



**TRIATHLON**  
AUSTRALIA

# GOMEMBERSHIP CLUB SET UP MANUAL

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This manual is provided to all Triathlon Australia affiliated clubs and contains processes and information on how to set up a club using GoMembership.

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## CLUB SET UP

Stripe is the integrated third party software used by GoMembership (GoM) to enable payments through the Triathlon Australia (TA) Membership and Events Portal.

You will need to set up a Stripe account to enable your members to pay their fees via GoM. Once your Stripe account is set up and connected to your clubs GoM account, you will not need to log in further unless updating your bank details or to add and remove users. All financial reporting is available through GoM.

## STRIPE ACCOUNT SET UP

To set up your Stripe account head to the Stripe Australia website and complete the set up. If you would like to watch a video of the Stripe set up process, [please click here](#).

## SET UP VIA STRIPE AUSTRALIA WEBSITE


To begin the process, head to the [Stripe Australia website](#) and click on the 'START NOW' button.

## ACCOUNT CREATION

To create an account with Stripe, you will need to enter your email address, full name and select a password. The person creating the account should be an authorised signatory for the club. This person will then become the 'Account Owner'. When all details have been entered click on 'Create your Stripe Account'.

You will receive an automatically generated email from Stripe asking you to confirm your email address. Actioning this step is crucial as you will not be able to complete the set up process until this is done.

Note: If the Club Administrator is not the Account Owner, it is easy for them to be added to the Stripe account as an Administrator. The details of the Account Owner can be easily transferred if/when there is a change of personnel.



The screenshot shows the 'Create your Stripe account' form. It includes fields for 'Email', 'Full name', 'Country' (with a dropdown menu showing 'Australia'), and 'Password'. Below these fields is a checkbox for 'Get emails from Stripe about product updates, industry news and events. If you change your mind, you can unsubscribe at any time.' with a link to the 'Privacy Policy'. At the bottom is a purple 'Create account' button.

## ADDING CLUB DETAILS

Once you have verified your account, add your business details by Selecting 'Start'.

**Next, add your business details**

Tell us a little more about your business to start accepting payments.

[Start →](#)

Enter your clubs details as per the headings noted below.

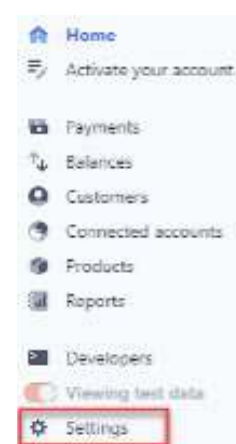
Business Structure	Registered club address
	Business type - NFP etc.
Business Details	Legal business name and ABN
	Registered business address
	Contact details and website
Business Representatives	Details of authorised respresentatives
Business Directors	Add directors as needed
Credit Card Staement	Enter descriptors to appear on member's statements as needed
Bank Details	Club bank account information
Two Step Authentication	Set up authentication via SMS or an authenticator app
Summary	Review and submit information

## ADDING USERS TO YOUR STRIPE ACCOUNT

You are able to add additional people from within your Club to the Stripe account. You have the option of giving them full administration rights to the account. Alternatively, you can permit view only access which will allow them to view the data in the account but not make any changes.

To add a new user, click on 'Settings' from the very bottom of the left-hand menu and choose Team at the bottom of the screen.

Then select the '+ New User' button from the top of the screen. Enter the email address/es of the person/people you wish to add to the account and select the role you would like to assign to them. This is defaulted to 'View Only' so be sure to update it if you want them to have administration access.





An email will be sent from the system to the new user with an invitation to join the Account that you have set up. At first, they will have to follow the normal account set up process. However when they log into their account, they will not go through the activation steps as these were already completed by yourself. They will also be prompted to set up Two Step Authorisation on their account login on the second time that they log in.

You can view and remove any users with access from this same area. You will also be able to view when someone was last logged in as well as transfer ownership of the account in the event that you leave the club or no longer hold an official position within the Club.

## LINKING YOUR ACCOUNT TO GOMEMBERSHIP

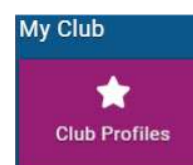
After logging into your GoM account, from the menu, locate and click on the 'Payment Set up' tile.



On the new screen, click on 'Let's Get Started' at the bottom. This will direct you out to a Stripe web page. Using the login details that you created when you set your Stripe account up, log into your existing account. When prompted, select to authorise GoM access. You will then be redirected back to the payment set up screen where the screen image will have changed to a 'Setup Complete' confirmation screen. There is nothing further that you need to do to enable your club to accept payments online.

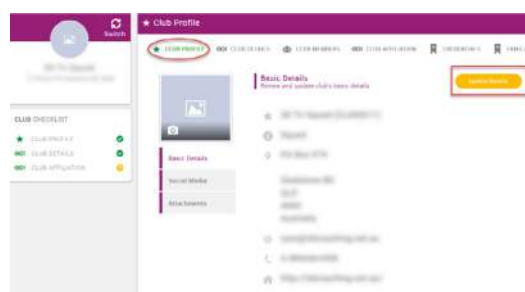
## CLUB PROFILE

All clubs will have a 'Club Profile' in GoM. This is where information is housed that is then fed to different areas of the system, including the Club Finder and Member Invoices. It is always important to ensure that the club information is up to date. To begin this process, click on the 'Club Profiles' tile within the menu. This is located under the 'My Club' header.



## UPDATING DETAILS

Click on the 'Update Details' button to make sure your basic information is up to date including the location, contact information and your geo location. Do not change your club name in this area as it will affect the connection to your payment portal.



If your club does not have a physical address, you will then be able to put PO Box detail or the Treasurer's address in a different part of the club profile to populate the member invoices that are generated from the system.

## GEO LOCATION

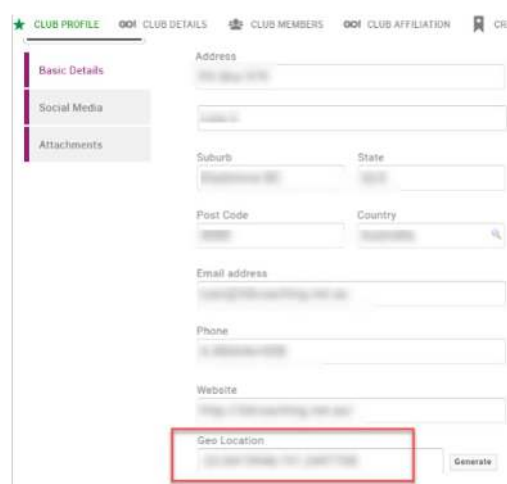
The geo location is what is used to locate your club within the Club Finder with a location pin so it is important that it is accurate so that new members can find you.

If you do not have a physical address for your club (for example you meet at a certain spot at a park or track) or your club is showing up in the wrong location on the Club Finder map, you can manually set your geo location.

To do this, head to [Google Maps](#) and locate your Club or your meeting point. Once located, right click on the relevant point within the map and the longitude and latitude will be the first text in the box. Click on these numbers.

This will copy the information to your clipboard and right click and paste it into the geo location field on your Club Profile.

It is important that you DO NOT click on the generate button after you have pasted the information. Simply press save once you have pasted it.

CLUB PROFILE | CLUB DETAILS | CLUB MEMBERS | CLUB AFFILIATION | CRED

Basic Details | Social Media | Attachments

Address: [Field]  
[Field]  
[Field]

Suburb: [Field] State: [Field]

Post Code: [Field] Country: [Field]

Email address: [Field]

Phone: [Field]

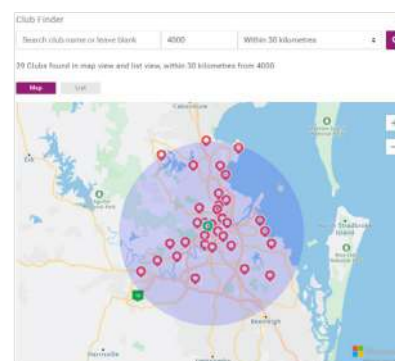
Website: [Field]

Geo Location: [Field] Generate

## CHECKING WHERE YOUR CLUB 'PIN' DROPS ON CLUB FINDER

To check where your club appears in the Club Finder, click on 'My Profile' from the header menu bar at the top of your screen. From the right-hand side of the screen, click on 'Select Club' under 'My Clubs'.

This will open up the Club Finder tool. You will see that the postcode field will be prepopulated. This will be the postcode that is in your profile. You can remove this simply by highlighting and typing over it or just deleting it. Type in your club's name in the Club Name field, or your suburb or postcode in the next field. You might see red and green pins on the map. Green indicates that you are already connected to that club.



Scroll in or out to view more detail on where your club pin has been placed. If you are not happy with the positioning of your club on the map, follow the steps outlined in 'Geo Location' above. If there are multiple pins, click on the pin to view the club details.

## LOGO

To update your club logo, click on the camera icon over the existing image. Then click on 'Select Image' or 'Change', locate your logo on your device and click 'Done' when you are happy with the appearance.

Logo image size is 138x177. Please be aware that in some pages of the program this image will have a circular shape so you need to choose a photo to fit that format.



## SOCIAL MEDIA

You will see a tab along the left for 'Social Media' and one for 'Attachments'. At this stage, the social media information entered does not appear anywhere, however there are developments on the System Road Map to have this data show up on the Club Finder tool. When finished making your updates, click on 'Save'.

## ATTACHMENTS

Attachments can only be seen by those with Club Administrator access to the system with permission to view your club. You may want to utilise this area as your Document portal for things like Committee Meeting Minutes, By-Laws, and Constitution, etc., so that your important club documents are housed in a single portal that can be accessed by all admins. This will assist when there is a change of members in committee positions in that all relevant documentation is readily accessible as opposed to being saved on someone's personal computer etc.



## DISCIPLINES/PROGRAMS

If you click on 'Club Details' along the top, it will display a page with two new tabs. The first one, 'Additional Information' will display the clubs home venue information, however if you click on 'Programs' you will see a range of disciplines. The selected Club Programs will determine what club disciplines are shown to members signing up. Some of these disciplines might be Age Group, Beginners, Ocean Swim Training, Juniors, Elite Pathways etc. Select all those offered at your club. As part of the Club Finder Developments, members will be able to search by discipline as well as the existing postcode, suburb or club name. In preparation of this, it is recommended that you keep it updated. When finished making your selections, click on 'Save'.



## MEMBERSHIP SET UP

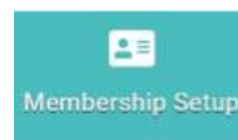
You have the ability to set up as many different memberships as your club requires. However, they must all align to the 'Classifications' available in the system. Each membership will be presented as its own Membership Tile.

All clubs have been pre-loaded with Membership Tiles for all basic club options in line with the memberships offered by TA. These are:

Premium Adult/Premium Junior
Standard Adult/Standard Junior
Basic Adult/Basic Junior
Social Adult/Social Junior
14 Day Trial
8 Week Trial

You can update these pre-loaded membership names and settings or archive them if they are not required by your club e.g. if your club doesn't have junior members you can archive the membership.

Each membership is also pre-loaded with the TA membership benefits and other basic set up information. From the menu, locate and click on the 'Membership Setup' Tile.



You will then see a list of all the memberships already setup for your club.

★ Membership Setup						
Membership Overview						
<a href="#">Add new membership</a> <a href="#">Configure family membership</a>						
Name	Description	Price	Duration	Status		
Premium	Adult Package - Designed for the avid triathlete who wants additional value and benefits from their triathlon membership.	\$0.00	1 Year	Active	↑ ↓ ↻	ⓘ
Premium	Junior Package - Designed for the avid triathlete who wants additional value and benefits from their triathlon membership.	\$0.00	1 Year	Active	↑ ↓ ↻	ⓘ
Standard	Adult Package - Essential for the regular member and provides access to enhanced member benefits.	\$0.00	1 Year	Active	↑ ↓ ↻	ⓘ
Standard	Junior Package - Essential for the typical club member and provides access to most member benefits.	\$0.00	1 Year	Active	↑ ↓ ↻	ⓘ
Basic	Adult Package - Ideal for those who just want a lighter experience and only want to train with their club or participate in events or tri only on an occasional basis.	\$0.00	1 Year	Active	↑ ↓ ↻	ⓘ
Basic	Junior Package - Ideal for those who just want a lighter experience and only want to train with their club or participate in events or tri only on an occasional basis.	\$0.00	1 Year	Active	↑ ↓ ↻	ⓘ
Social	Adult Package - Perfect for fans, volunteers and supporters who want to enjoy club life, stay connected with the latest triathlon news and watch Aussies in action.	\$0.00	1 Year	Active	↑ ↓ ↻	ⓘ
Social	Junior Package - Perfect for fans, volunteers and supporters who want to enjoy club life, stay connected with the latest triathlon news and watch Aussies in action.	\$0.00	1 Year	Active	↑ ↓ ↻	ⓘ
14 Day Trial	Trial club life - start training with a club and make sure it's the right fit before you commit and become a regular triathlon member.	\$0.00	2 Week	Active	↑ ↓ ↻	ⓘ
8 Week Trial	Get started - New to triathlon or interested in joining a club? Experience club life with an 8 week trial - perfect for beginner programs.	\$0.00	8 Week	Active	↑ ↓ ↻	ⓘ

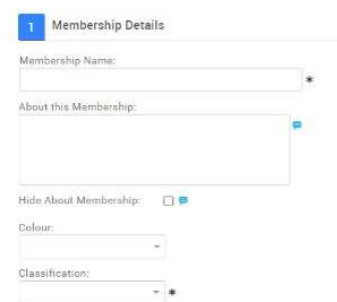
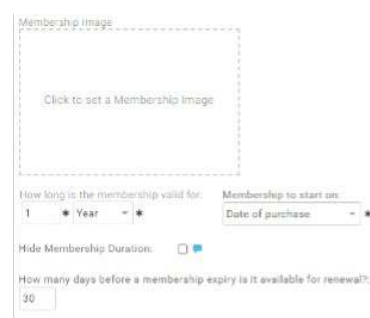
To edit an existing membership, you can click on the pencil icon to the right of the membership line, or to add a new one, click on the 'Add new membership' button above the listed memberships.



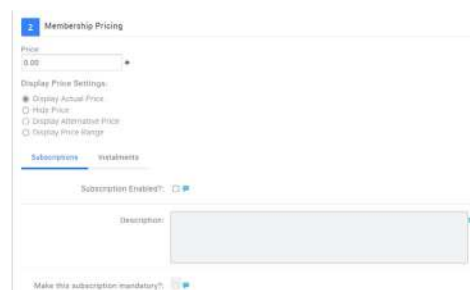
## MEMBERSHIP SET UP REQUIREMENTS

There is basic information that needs to be setup for all memberships and there is mandatory information that must be entered as part of the setup.

- **MEMBERSHIP NAME** - The Membership Name is what will appear at the bottom of the Membership Tile and against the member's name in reports and invoices etc. The name should be self-explanatory to the members who will be buying the memberships.
- **ABOUT THIS MEMBERSHIP** - The data in this field will appear when someone clicks on the membership tile or clicks on 'More Information'. It will also appear on their invoice so it should be a short, succinct description or it can be left blank.
- This is where you have the ability to note who this membership is applicable to, such as if you have a separate membership for people with a Health Care Card. In here you would note that it is a Concession Membership only available to those with a current health care card which must be presented to the club.
- **COLOUR** - The colour selected will be the colour of the font and background in some areas of the tile. There are only a small number of colours available for selection.
- **CLASSIFICATION** - This is the linking of the membership to the State and National classifications. This allows the system to automatically apply the relevant TA membership fees to your club memberships. This is a mandatory field so you will need to select either Premium, Standard, Basic or Social.
- **IMAGES** - Any images that are added to a membership are displayed on the Membership Tile as well as in the cart / at checkout after a membership is purchased. If there is no image attached to a membership, a grey area will display on the tile and no image will appear in the cart.
- **LENGTH OF MEMBERSHIP** - This can be entered as weeks, months or 1 year. Enter the number in the box and select the term from the drop down.
- **MEMBERSHIP TO START ON** - This is where you define your memberships for a predefined period/season. You can determine how many days prior to a membership expiring a member can renew from. You will set this by entering the number of days. The current standard is one month and the system is defaulted to 30 days and it is

suggested you retain this as the system generated 'your membership is due for renewal on X date' email will send a month prior to the renewal date, letting them know that their membership is about to expire.



- **MEMBERSHIP PRICING** - In this field you will enter in the club component of the fees charged to your members. The TA fees will automatically be assigned to the member when they get to their cart/checkout.
- **DISPLAY PRICE SETTINGS** - Here you have the ability to determine the price that will display on the tile of the membership. It is important to note that it will display the club portion only if you select display actual price, which is not the full amount that your members will be charged. It is recommended that you select 'Display Alternative Price' and manually enter in the price that the member will pay i.e. the TA fee plus club fee (this is the preferred option) or you can define a price range to display. You are able to 'hide price' and show no price on the tile however this is not recommended as the member will only see the price when they get to their cart/checkout.
- **MEMBERSHIP BENEFITS** - Membership benefits are displayed as dot points on the Membership Tile. All preloaded club memberships are populated with the TA membership benefits. You can add your own club benefits and remove or change the order of the default ones that have been entered. Use the up and down arrows to reorder the benefit dot points.
  - o *Do not delete or change the membership benefits already pre-loaded by TA. These will be modified by TA if a modification is necessary.*



- To add a membership benefit, click on the blue 'Add a New Benefit' button. In the free text area, enter in the benefit that you wish to list and when complete, click on the green tick or the red cross to cancel. Repeat this process for all of the membership benefits you want to add.

## DISCOUNTS AND SURCHARGES

This area provides your club with the ability to refine who can see and purchase your memberships, who can receive a discount and who will be charged more (a surcharge) based on their profile or on the date. Some common discounts are over 65s, renewing

members, new joiners, Life Members etc.

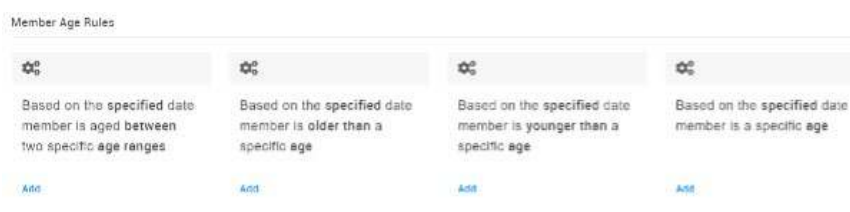
As part of the template memberships that have been pre-loaded for your club, there will be a restriction rule already applied which is age based. Only members who are under 20 will see the Junior Membership and equally, only those 20 and over will see the Adult Membership. You can group together multiple rules within the one membership which means the members have to meet all those rules in order to purchase the membership.



To add a new rule, click on the blue 'Add New Purchase Rule' button, taking note of whether you are in Restrictions, Discounts or Surcharges based on which of the headings in blue. Give the Purchase Rule a name so that is clear what rules you have set up in the membership.



Click on 'Add New Rule' - it will first tell you what type of rule you are applying, whether that be Purchasing Restriction, Discount or Surcharge. Next to that it will have the name of the membership you are applying this rule to. Below this, you will see tiles of the different rule grouped by the type of rule, i.e. date/age etc.



To set a rule based on the age of the member, click on one of the Member Age Rule. For example, if you want to restrict the purchase of this membership to members over the age of 17 only, then click on 'Based on the current date, member is older than a specific age'. After you select this rule, you will be presented with an area to complete. In the free text box, you will need to change the default age to the one that is relevant to your membership setup. When you have finished applying the rules applicable, click on 'Done'.



To add a discount rule, based on age, click on the Discounts header and then click on the blue 'Add new Discount Rule' button. You will need to enter in a description for the discount as well as an explanation. This might be 'Senior Citizen Discount' for example.

For discounts and surcharges, the value can be either a dollar amount or a percentage. Where it is a percentage, you will need to note this by ticking the 'Is Percentage' box after entering the value. 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.

Click on the same rule button as before to specify an age-based discount. You will be presented with an area to complete. If you enter 65 as the age in the field presented, based on the examples set here, members who are over the age of 65 will automatically receive a 25% discount on this particular membership. The surcharges are applied in the same manner.

You can also apply rules based on a member field, such as if they are listed as a Life Member for your club. Here you would select the rule tile 'The specified profile field for the member is set to the following value'. The field that you will then choose will be from a list of all fields set up by your club. You will select the Club Life Member Rule and chose the value as 'Yes'. This will mean that where the member has been listed as 'Yes' to being a Life Member, they will receive the discount that you apply.

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.

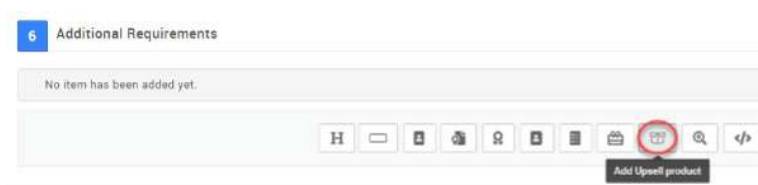
To apply a surcharge to members who are new to your club, you can select 'Is New Joiner' from the rules tiles. This will apply the rule to anyone who has not been a member of your club previously. Important to note that this is a profile based rule, so if a previous member was to create a brand-new profile in the system, the surcharge will not be applied as that profile has not previously been connected to your club.

## PRODUCTS

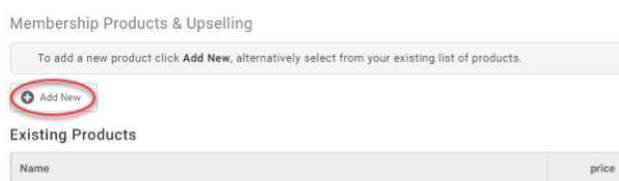
Products can be set up and sold as part of the membership journey. As with the other fields, you can determine which products are available for purchase based on the membership being purchased. Once you set up products once, you will then be able to select them from a pop-up window for all remaining/future memberships that you setup.

The most popular options here might be club t-shirts, club merchandise etc.

From the Additional Requirements area, click on 'Add Upsell Product'.



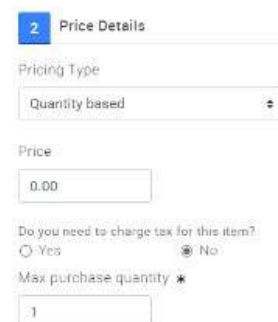
Click on the 'Add New' button. In the name field, enter the name of your product, remembering that this is what the member will see, so you want to make it nice and simple.



If you want, you can also enter a description in the field provided. If you enter an image here, it will appear when they are making their selection as well as appearing in the cart / checkout and on the invoice.

In the field provided, enter the price of the product and if your club is GST Registered, make sure you click the Yes button under the tax field so that GST is noted on the invoice. You can also set a maximum number that can be purchased as part of the journey. Simply enter the number in the Max Purchase Quantity field.

As you complete the set up for your products, they will appear as a list with the image that you have uploaded, the name, detail and price. This is also how it appears for your members when they select the membership that you have added these products to. If you need to add some information capture fields in relation to your product, for example t-shirt size, you can create and add a Field and insert it before or after the product listing.



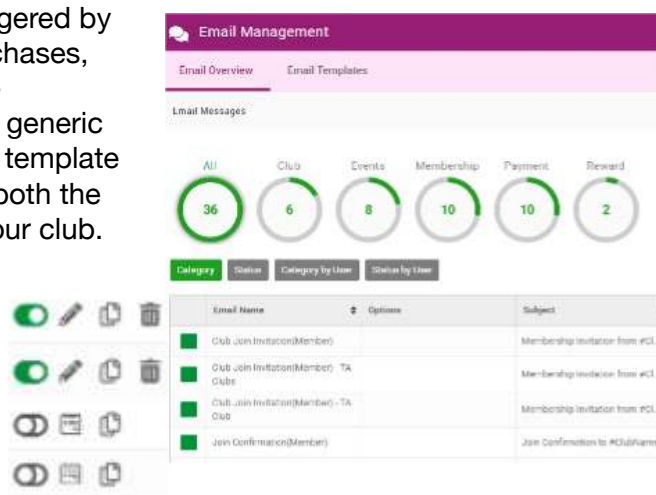


## EMAIL MANAGEMENT - SYSTEM TRIGGERED EMAILS

GoM has pre-defined emails that are triggered by system events such as membership purchases, renewal notifications and when someone registers for an event. TA has pre-loaded generic text for these emails as well as a generic template however each club is able to customise both the content and template to be specific to your club.

The emails will only send for your club if they are set to 'Active'.

A generic template will be available for you to use to customize your own system triggered emails.



Please note that TA and your relevant STTA offices will be sending members the following information via email on a schedule. This information is provided to determine that members do not receive multiple emails regarding the same information.

- Membership expiry reminder – 30 days prior and 15 days prior to expiry
- Renewal available at start of season – When membership for the new season can be purchased
- Credential and qualification expiry – upon expiry of select credentials and qualifications against members profiles, members will be notified 30 days prior, 14 days prior and upon expiry.
- Payment reminders for failed automatic payments – Payments will be attempted 3 times after initial failure. Members will be notified if payment is still outstanding after these attempts.

### BASIC DETAILS

From the menu, locate and click on the 'Email Management' Tile which is under the Club+ section. You will then see a list of all the system triggered emails already set up for your club.



Before we look at editing the text / content within each individual email, we will first look at setting up the template that all of your system triggered emails will come from.

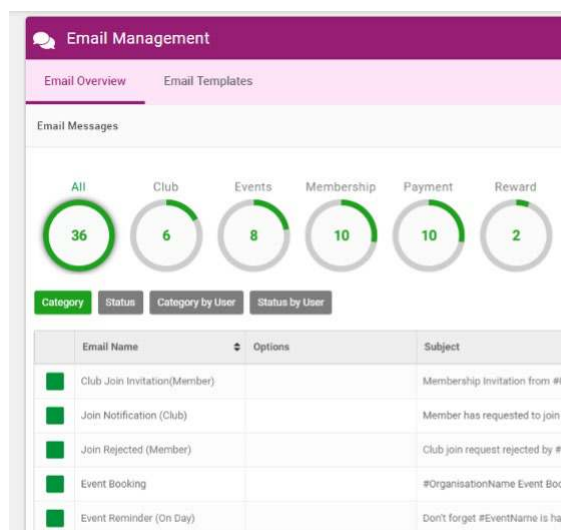
## SET UP – CLUB SYSTEM TRIGGERED EMAIL TEMPLATE

From the menu bar at the top of the Email Management screen, select 'Email Templates' then you will see that there is a template named 'CLUB DESIGN'.


Click on the edit pencil to access the generic template that has been loaded for your club. You can update club details and customise this template to include your own club logo and club colours etc.

The 'Organisation Name' and 'Organisation Email' details are extremely important as the details written in 'Organisation Name' will be used to populate #merge fields in the email content.

'Organisation Email' is the default email address all system triggered emails will be sent from (and replies received to). The details have been pre-populated based on information that TA was provided however you can change this as required and then press save.



## EMAIL MANAGEMENT SETUP AND CUSTOMISATION



To update the logo click on 'Header' and then 'Upload Logo'. You can also enter a link such as your website to the logo so that when it is clicked on, it will link the user out to that website.

To change the colour of the blue heading band or the text within it, click on body then click on the cog next to background colour and text colour. You can select from set colour options or manually key in the Hex code for your logo colour.

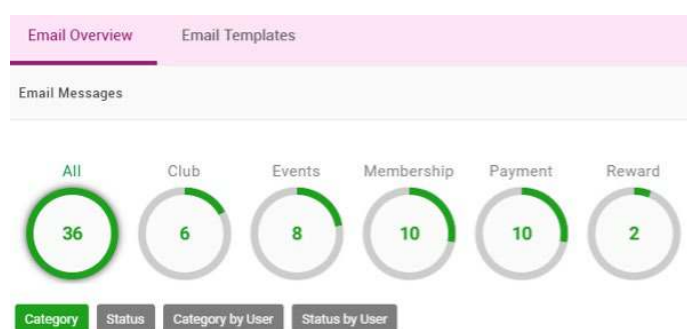
TA have pre-loaded a default message for the footer text which you can also update by clicking on footer and overwriting the text. However, it is important to note that the core sentiment of the message is required under Australian Privacy Law.

Once you have finished making changes to the template click save to exit.

## EMAIL SEND FROM ADDRESS AND CC'ING CLUB ON AN EMAIL

As outlined on page one, all system triggered emails will send from the email address that is entered into the 'Organisation Email' field on the club email template.

From the menu bar at the top of the email management screen, select 'Email Overview' then you will see circle icons that you can click on to access the topic specific emails. The emails marked with the green tab are the emails that are set to active. Again, please note that the templates with 'Triathlon Club' are the ones to use.



To edit the send email address of an individual system triggered email, click on the edit pencil, key the desired email address into the From field under Content Edit.

If you wish to CC (copy) or BCC (blind copy) the club on a specific email, enter in the email address in the CC or BCC field.

## EMAIL CONTENT / WORDING

To edit the content / wording of each email, scroll to the bottom of the screen to the 'Message Body' and overwrite any of the text you wish to alter. To add key fields from the GoM database to your emails, use the # icon to add #merge fields from a limited pre-set list. You can do this for the email subject line as well.

## CREATING NEW SYSTEM TRIGGERED EMAILS

You are able to create additional system triggered emails for specific membership types as long as they are based on the same trigger criteria as an existing email. For example you may wish to send a different email to new members who purchase a 'New Joiner'

membership verses a member who renews. To see the trigger criteria, from the email overview screen, click on the edit pencil and refer to the Description field at the top of the mail under general.

Once you have located the correct trigger event (eg in the example above 'Membership – On purchase Triathlon Club'), return to the email overview page and click on the copy icon.

Rename the copied email to a relevant name in the Name field (eg in this example On Purchase – Triathlon Club New Joiner) then customise the content as per instructions above.

To define which membership the email is to be triggered for, click on the arrow in the 'Arguments' field and select the relevant membership type. After making your selection, click on the small green '+' which is located next to the arrow.

If you want to assign this template to another membership also, simply repeat the steps, ensuring you click on the '+' after each selection to save it. You will see each of the selected memberships under the arguments area as you save them (image to the right) .

The outcome of this change is that the original email will be triggered for all other membership types and the new membership specific email will be sent to the specified membership type only (in this example New Members).

## ACTIVATING/DEACTIVATING SYSTEM TRIGGERED EMAILS

The emails marked with a green tab are the active system triggered emails.

## FIELD MANAGEMENT AND CUSTOM QUESTIONS

GoM provides the functionality to ask questions and capture additional information and data from your members either as part of purchasing a membership or simply as an extra form on their profile that they can complete at any time.

The first step is to create a 'Form'. Within this form you will create 'Fields'. These fields are the questions you will ask or the extra data you want from your members. These 'Fields' can be added to specific memberships. This means that when someone selects to purchase that membership from your club, they will be asked to complete the fields prior to continuing with the purchase.

You can set these fields to mandatory or optional as you see fit. You can also set them so they are hidden from the member, can be seen but not edited by the member or so that they are both seen and can be edited by the member.

Different instances where you might use these settings is where you have Life Members and you want your members to see that they have been listed as a Life Member but not be able to change that themselves.

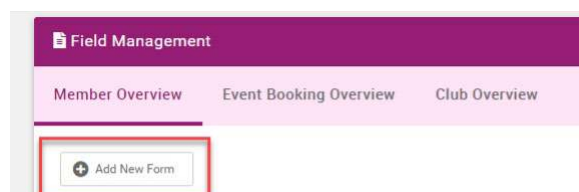
You might also have a requirement that all of your members complete a particular task or demonstrate a level of proficiency etc before they are accepted in particular events, in which case you might make fields that are hidden from their view, that will enable you to update their profile and even restrict their purchase to an event or membership based on the answer to this question (i.e a Purchase Restriction rule that is 'Member Field is equal to ' this means that any member with a 'no' in this area can neither see nor purchase that membership).

If you have club Terms and Conditions that members need to agree to at the time they purchase their membership, you can utilise this functionality to create these and have a mandatory tickbox they must check tick to be able to progress with purchasing the membership. While there is no limit to the number of forms nor fields (questions) that you can set up for your club, it is always a good idea to be mindful of the end user experience; what it will be like for your members when they click in their profile or when they complete their membership purchase.

## SET UP

From the menu, locate and click on the 'Field Management Club' Tile. This is under the Club+ header.

The first thing is to select 'Add New Form' from the top left of the screen.



You will then 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 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.

For each club/organisation that an individual is a part of, they will see all forms that have been set up by them on their personal profile. As noted above, to access these forms, they will click on 'Member Details' within their 'Member Profile'. They simply click on the club name to see the forms they have. If you choose not to add the fields to the membership



purchase journey, this is the only area that the forms and their fields will appear.

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.

The next step is to add fields to your form. This is the data you are wanting to collect from members or enter into their profile for the clubs information.

Click on 'Add Field'. You will see that 'Label Text' is already highlighted. This is the question field. The answer type will also be pre-set to 'Short Answer'. It is important not to type your question/field in until you have selected your answer type as changing the answer type will result in the removal of any text in this area.

There are nine (9) possible answer types:

Short Answer	This is a free text field that allows the member to enter anything they like in a small space.
Paragraph	This is the same as the short answer however it provides larger area for longer answers.
Numeric Answer	This provides the member with a field that they can only answer numbers into.
Checkboxes	Your club defines the answers available and the member chooses as many as they want.
Multiple Choice	Your club defines the answers available and the member can choose only one of these.
Dropdown	Similar to the multiple choice in that the club defines the available answers however the member will select their choice from a dropdown box (max 1 answer per dropdown).
Date	Presents the user with a date picker tool (calendar). Only a date can be entered in here.
Tickbox	This is a single tickbox that is presented to the member. Ideal for Terms and Conditions (i.e. I have read and agree to the club Terms of Membership as provided for on the club website).
Yes/No	This is the same as the dropdown, however it is prepopulated with Yes and No. All answer types provide you with the ability to enter information into a 'Tool Tips' space. This information will appear when a member clicks on the small speech bubble next to the field.

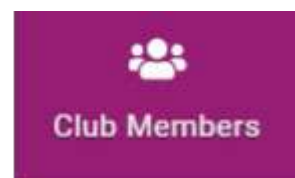
All answer types provide you with the ability to enter information into a 'Tool Tips' space. This information will appear when a member clicks on the small speech bubble next to the field.

To add available answers on the questions types that allow it, click on 'Add Option' and type in the answer. Continue this until you have entered all answers to be made available on that particular field. To make a field mandatory as part of the form, click on the toggle switch to the right of 'Required'.

## VIEWING/UPDATING FIELDS

**\*\*Please note:** There are currently no member profiles available to action this due to implementation still ongoing. If you would like to see an example of this in action, you can view your own profile to understand this.

To view and/or update the fields on any of your members profiles, from the menu, locate and click on the 'Club Members' Tile. When the page loads you will be presented with all of your club members. You can click on any of the infographic circles to filter your members or use the search function.



When you have located the Member you are after, click on their tile.

From the tabs on the left-hand side, select 'More About Me' then select your club from the tiles at the top of the new page.

You will then see all forms that you have setup at your club. Click on the relevant form to view the details.

From here you can edit any of the fields that you have set up. You cannot change the settings of the fields though. For example, if you wanted to make the Life Member field hidden to members, you would need to go back through the steps outlined in the above setup to view the form and edit the settings.

Be sure to click 'Save' when you have finished making your change