

# **GoMembership** **Event Administration Manual**

TRIATHLON AUSTRALIA

# EVENT ADMINISTRATION

This manual is provided to all Triathlon Australia (TA) affiliated State and Territory Triathlon Associations, clubs and event organisers and contains support on how to set up an event for registration purposes using GoMembership.

<b>Version</b>	1.2
<b>Date</b>	August 2021
<b>Author</b>	TA, J Wilfred

# CONTENTS

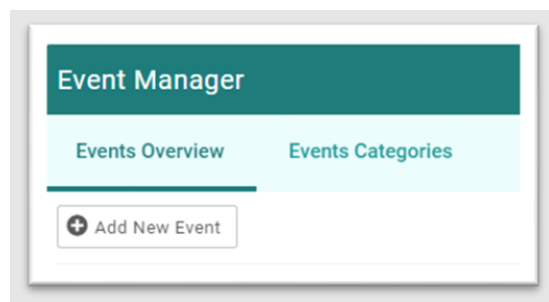
<b>CREATING A NEW EVENT</b>	<b>1</b>
EVENT NAME AND TYPE	1
EVENT CATEGORY	1
EVENT LOCATION	1
EVENT DATE AND TIME	2
EVENT IMAGE	2
EVENT DETAILS	2
EVENTS CONTACTS	3
<b>EVENT TICKETS</b>	<b>3</b>
ADDING TICKETS	3
EDITING A TICKET ITEM	3
BOOKING FORMAT	4
<b>TICKET RESTRICTIONS, DISCOUNTS, &amp; SURCHARGES</b>	<b>4</b>
RESTRICTIONS	4
DISCOUNTS	5
SURCHARGES	6
ADDITIONAL DETAILS	6
<b>SUPPORT</b>	<b>8</b>
TRIATHLON AUSTRALIA	8
STATE AND TERRITORY TRIATHLON ASSOCIATIONS	8

# CREATING A NEW EVENT

To create a new event, select the **Menu** button on the top left of the screen and locate the **Event Management** tile.

At the top-left of the screen select the **Add New Event** button to create a new event.

This will open a new form to enter in your event details.



## EVENT NAME AND TYPE

Enter in your Event name. This is the name that will be seen by all members – ideally this will be the same name that you use to enter your event into the Online Sanctioning Portal for sanctioning purposes (not relevant for Social and Training events).

**Note:** As this system is designed to be used by multiple organisations and a number of these events will show up in the directory, **you will need to ensure that you don't set up the event with a vague name.** The name of the Club/Association may also be recommended. This will also assist with reconciliation of fees collected if running multiple events at the same time.

**For example,** instead of 'Training Camp', use 'Logan Triathlon Club Training Camp' – April 2021 (date may also be useful if you run multiple camps).

Please select **Club** from the **Course Provider** list.

## EVENT CATEGORY

Select a **Category** from the dropdown which relates to your event. Depending on the category, a subcategory may also be available to choose from. You can select multiple subcategories depending on the disciplines you are including in your event.

**Note:** For club training or sanctioned club events, clubs will need to select **Club Events** as the category. If the event is sanctioned by Triathlon Australia as an Open event (100+ competitors), then **Triathlon and Multisport Events** can be selected.



## EVENT LOCATION

Select the **Location Type** from the dropdown. If your event has a physical location, select **Venue**. If it is a virtual event/course, select **Online**. You have the option to select this later by clicking **Announce Later**.

If your event will be held at a physical location, enter in the name of your event location (e.g. Sportsman Parade) and the address of the venue.

Search Venue  Use venue lookup

Event Location Name:

Address1:

Address2:

Suburb:  State:

Postcode:  Country:

Once the address is entered, you'll see a map appear on the right-hand side of your screen. Once you've entered in the address, a pin will appear on the map where your event will be located.

If the dropped pin on the map does not represent where your event will be exactly held, you can move this location by clicking 'Not the right location on this map?' which is located directly under the map.



A **Location Reference** field will appear where you can adjust the Latitude and Longitude of the location. You can find the exact coordinates of your venue by opening Google Maps. Right-click the place or area on the map. Select the latitude and longitude - this will automatically copy the coordinates to paste into the Location Reference field.

Location Reference (Latitude & Longitude):

## EVENT DATE AND TIME

In the **Timezone** field, select the time zone applicable to your event using the dropdown list. Use the date and time functions to select the start and end date and times of your event. Times will be listed in 24hr format.

You can use **Text instead of Date** by checking the **'Hide Date and Time'** checkbox and entering the dates in the text field. Example below

Timezone:

When:  \* Time - Hr:  Min:

End Date:  Time - Hr:  Min:

Hide Date and Time: ☒ Include Calendar Invite: ☒

Text Instead of Date:

An option to include **Calendar** invite is available, however please note that the invite will use the When and End date information entered above.

## EVENT IMAGE

You can enter in your club or event logo in the **Event Image** section by selecting the **Camera** icon in the bottom left corner of the image. It will ask you to **Upload an Image**. Click the **Browse** button and select an image from your device to upload and select **Done** to save.

Event Image:

## EVENT DETAILS

Under **Event Details** you can enter detailed information regarding your event. You have many formatting icons available to you in order to upload your event content. In this field you can enter additional images, add hyperlinks to websites, and add tables. You can also copy and paste any information from another location into this field.

If copying from a Word Document, you can choose to keep the same formatting by selecting **Keep**. If you choose **Clean**, all content will be copied over, but the font type and colours will be reset.

Word Paste Detected

The pasted content is coming from a Microsoft Word document. Do you want to keep the format or clean it up?

## EVENTS CONTACTS

Add contacts to your event, by selecting **Add Contacts** so members know who to contact for questions regarding your event.

### 2 Event Contacts

+ Add Contacts

You can type the details of the contact in the available fields, or search for an existing member in your club by using the **Find Member** field. If you selected the relevant member, the fields will be pre-populated with their details. If you wish to use a separate contact number or email address to the one linked to their membership, you can amend this and enter in the details you wish to use. When you have finished making changes select **Done**.

You can add more contacts but only one will be listed as the primary and will be displayed as part of the event.

Create new contact



Find Member: Search by Name...

MID:   
First Name:  \*  
Last Name:  \*  
Email:  \*  
Phone:  \*  
Role:  \*

Primary Contact: ☒

Cancel

Done

## EVENT TICKETS

### ADDING TICKETS

Adding tickets to your event is what enables individuals to sign up and register for your event online. To add a new ticket, click on **Add New Ticket** button.

### 3 Event Tickets

+ Add New Ticket

An editable line will appear where you will enter the name of the ticket, the price, and the quantity available. Select the green tick when you are finished.

Tickets	Price	Quantity available
Name: <input type="text"/>	Price: 0.00	Quantity available: 0

Repeat this for all ticket items that will be available at your event. To make changes to a ticket, click on the pencil icon on the right to edit, or the bin icon to delete a ticket.

### EDITING A TICKET ITEM

Tickets	Price	Quantity available
Sprint Aquathlon - Saturday	\$70.00	20

Once you've added all your ticket items, you'll need to include ticket details such as who can purchase your ticket and when. To include these details, click on the **Settings** icon to the right of each Ticket item.

### 1 Ticket Details

Name:

Sprint Aquathlon - Saturday

Description:

Code:

Price:

70.00

Display Price Settings:

- ☒ Display Actual Price
- ☐ Hide Price
- ☐ Display Alternative Price
- ☐ Display Price Range

You have the option to add a description for each ticket item. You can use this section to identify who this ticket is applicable for e.g. Standard members over the age of 18yrs.

**Price** – this will be what is charged for the ticket and you have the option to modify the price settings.

**Note:** The fee put will be what is charged for the event ticket and includes any processing fees incurred with the merchant (make sure you account for this when setting pricing).

## BOOKING FORMAT

Setting your ticket to **Member** format will allow individuals to purchase tickets to the event. We recommend that you also use this function for **Team** tickets and add in additional fields to request other member details who will make up the team (i.e only one person from the team registers and purchases 1 ticket for the team).

The screenshot shows a form for configuring a ticket. It includes a 'Booking Format' dropdown set to 'Member', a 'Timezone' dropdown set to 'Australia/Brisbane (UTC+10:00)', 'Booking Start Date' and 'Time - Hr: Min:' fields set to '01/01/1901' and '00:00' respectively, 'Booking End Date' and 'Time - Hr: Min:' fields set to '22/10/2021' and '12:00' respectively, 'Quantity available' set to '20', 'Min Booking Qty' set to '1', and 'Max Booking Qty' set to '1'. There are checkboxes for 'Prevent Multiple Booking' (unchecked), 'Save as template ticket?' (unchecked), and 'Is Active' (checked).

Using the **Booking Start Date** and **Booking End Date** functions, enter in the date and time-period that this ticket will be available to purchase. You can determine the minimum and maximum number of tickets that can be purchased by individuals. This will only apply per transaction. If you select the checkbox next to **Prevent Multiple Booking** you will prevent individual members from booking this ticket multiple times.

You can also add a separate image for each ticket item using the camera icon to the right of the screen.

## TICKET RESTRICTIONS, DISCOUNTS, & SURCHARGES

You'll need to build in rules for each ticket to set up when they are available for purchase, who they are available to, and when discounts and surcharges should be applied by selecting the settings icon to the right of each ticket.

### RESTRICTIONS

Use purchasing rules to restrict which group of members are able to buy this ticket. There are a list of standard rule types which can be grouped together to form different combinations e.g. Age Rule & Gender Rule.

Start by clicking on **Add new purchase rule**.

[+ Add new purchase rule](#)

If you're wanting to allow participants of a certain age to enter your event, you can do this by selecting the following rule under **Member Age Rules**.

#### Member Age Rules

The screenshot shows a configuration box for 'Member Age Rules'. It contains a gear icon, the text 'Based on the specified date member is aged between two specific age ranges', and an 'Add' button.

If your ticket is available for all participants aged 14yrs and over, you would format it as shown below. Age determination for all categories is determined by age on December 31st during the season of the triathlon competition. For the categories Under 23, Junior and Youth Draft legal competition, age determination is by age on December 31st in the year of the coming World Triathlon Championship competition.



Another common rule would be to restrict the ticket to only be purchased by **Club members**. You would do this by selecting the following rule.

#### Membership/Affiliation Rules

After selecting this rule type, you would select the Membership types that would allow that participant to enter the race (as shown here – applicable membership types selected). If it was a Club training event you could also select the Basic Adult and Basic Junior Membership type.

You can also select '**Any Club Membership**' if you want this ticket item to be available to all members of your club. Note that this will include any non-core packages you may hold (e.g. Trials or Training Subscriptions).

By default, currently the list of packages will only show what the club has. If you want to instead filter by TA Membership packages (e.g. you open this event up to people outside of the club) then you will need to talk to your association for assistance. The Any NGB Membership option will not filter by those who hold competing memberships.

Click on **Done** when you've finished adding your restrictions.

**Note:** If you want to add multiple rules to the purchase restrictions, they will need to be grouped together. E.g. If you want the purchase to be restricted to individuals who hold current membership AND are over the age of 18, you will need to continue to add the rules within the one group by clicking on the 'Add New Rule' button and creating the rule within the one Group. If the rules are listed separately, it means they are applied in an 'Or' fashion – in that the individual must meet one OR the other to be eligible to purchase.

## DISCOUNTS

You set up the discounts in the same way that you set up Restrictions. Select the **Discounts** tab under Ticket Restrictions, Discounts & Surcharges.

### 3 Ticket Restrictions, Discounts & Surcharges

Restrictions **Discounts** Surcharges

Give your discount a description (this will only be seen by the club) and enter the amount of the discount. This can either be a dollar value or percentage. The amount entered will be the discount applied – not the reduced ticket total amount.

You'll need to select **Add New Rule** to determine who will be eligible for this discount.

For example, if your Club Committee are eligible for a discount on entries, you can select the following discount rule:

#### Club & Member Role Rules

You can select the types of Club Committee members eligible for a discount in the dropdown shown in the image below.

- > Standard Adult
- > Standard Junior

**Note:** When set up at club level, you will only be able to see Club membership packages. To validate against Triathlon Australia packages you will need to contact your relevant association contact to assist with this.

Another way to collect ODLs from ticket items is to apply the ODL fee to all ticket items and create a discount for the members who do not have a competing membership type.

Select **Save** once you've applied all discounts.

## SURCHARGES

### 3 Ticket Restrictions, Discounts & Surcharges

Restrictions Discounts **Surcharges**

You set up Surcharges in the same way that you set up Discounts. One of the most common surcharges is to charge Non-Members a One Day License (ODL) to race in your event.

Select **Add new surcharge rule** and locate the following rule under Member/Affiliation rules

Enter in the price of the ODL. You'll need to ensure you set the right ODL price depending on what the event is. Please locate the Terms of One Day Licence document on the Triathlon Australia website to assist you. Event Organiser Information ([triathlon.org.au](http://triathlon.org.au))

In the dropdown in the image above, select all membership types that are not applicable:

- > Premium Adult
- > Premium Junior

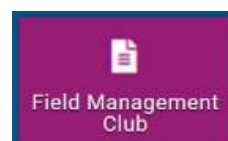
## ADDITIONAL DETAILS

### 4 Additional Details

GoMembership provides the functionality to ask questions and capture additional information and data from your members as part of registering for a particular ticket item.

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.

To set up these custom questions, find the **Field Management** tab in the **Menu** bar.



The select **Add New Form** under **Event Booking Overview**.

You will then need to give your form a name. This form name will appear to the Member Profile so keep this in mind when considering the naming.



Next, select an icon for your form if needed.

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, locate the four icons on the bottom of the page - click on the H icon to **“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. Click on the rectangle icon (the first icon of the four at the bottom of the page).

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. 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.

### 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. To access this, select the **Settings** icon.

#### General Properties

Tooltip

To add available answers on the question 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”**.

Remember to save your changes before clicking through to other pages.

To add these questions to your entry process, please return to the event you are creating by selecting the Event Management Tile from the Menu. Select the edit button against your particular event.

Scroll down to the **Event Ticket** section and select the Advance Cog on the right hand side.

Scroll down to the bottom of the page that opens and select **Form**.

A pop-up will display all forms that have been created. To select a set of questions, please click the blue header at the top. This will import all questions listed below as a set. If a green tick is shown against the heading, this means these questions have already been inserted.

Once you have added your questions, you can select whereabouts in the journey they will appear by using the up and down arrows. Remember to select **Done** once complete.

## SUPPORT

### TRIATHLON AUSTRALIA

**E:** [info@triathlon.org.au](mailto:info@triathlon.org.au)

**P:** 02 8488 6200

### STATE AND TERRITORY TRIATHLON ASSOCIATIONS

**QLD** - [admin@qld.triathlon.org.au](mailto:admin@qld.triathlon.org.au) (07) 3369 9600

**NSW** - [info@nsw.triathlon.org.au](mailto:info@nsw.triathlon.org.au) (02) 8488 6250

**ACT** - [admin@act.triathlon.org.au](mailto:admin@act.triathlon.org.au) (02) 6260 4430

**VIC** - [info@vic.triathlon.org.au](mailto:info@vic.triathlon.org.au) (03) 9598 8686

**TAS** - [admin@tas.triathlon.org.au](mailto:admin@tas.triathlon.org.au) 0419 152 487

**SA** - [admin@sa.triathlon.org.au](mailto:admin@sa.triathlon.org.au) (08) 8363 9133

**WA** - [admin@wa.triathlon.org.au](mailto:admin@wa.triathlon.org.au) (08) 9443 9778

**NT** - [eo@nt.triathlon.org.au](mailto:eo@nt.triathlon.org.au) (08) 8929 1695