

User Manual - Club Admin

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This user manual will give you an overview of all functionalities that can be performed by a Club Admin and where these can be performed.

Membership

In the membership section of BowlsLink you will be able to find all information related to members of your club.

The membership section is further divided into members, groups & categories, certifications and transfers.

Members

When you are in the members section you will be provided with a list of all the members currently in your club.

You will also be given the functionality to add new members.

The list is divided into three sections (tabs) - active, pending and archived.

For each member listed here you will be able to retrieve further information by clicking on their name.

Adding a Member

When you click the "Add Member" button in the member overview you will be able to add a new member to your club by providing all the relevant information or alternatively you can also add an already existing member.

1. Select "Add Member"

BOWLSLINK TAS Club 1 CHRIS CLARKE

Members Displaying 73 members

The ADD MEMBER button is in the top right of screen → ADD MEMBER

Active Pending Archived

FILTER Member Search Rows: 25 1 2 3 >

<input type="checkbox"/>	Last Name	First Name	Membership Number	Category	Financial Until	Member Since	Primary Club	Date Of Birth	Gender	Actions
<input type="checkbox"/>	Bogan	Nayeli	1987		13th Mar 2019		TAS Club 1	1-Jan	-	...
<input type="checkbox"/>	O'Connell	Taylor	997		12th Mar 2019		TAS Club 1	1-Jan	-	...
<input type="checkbox"/>	Frami	Lilla	277		12th Mar 2019		TAS Club 1	1-Jan	-	...
<input type="checkbox"/>	Lesch	Jerney	877		12th Mar 2019		TAS Club 1	1-Jan	-	...

a.

2. You will then be asked to provide personal details for the new member.

What is important to note is that the email and mobile phone number entered here are both the sign in and contact details for the member. These details need to be unique, and two members cannot have the same email address for example. If there are two club members who share an email address, simply leave this field blank. A separate field can be used to enter a contact email address for both members. Both the mobile and email fields can be left blank, as the member will still have a National ID they can use as their sign in.

Once the member has been created you can edit their details to add in a contact email address, which will be used for club communications only not for the logon process.

Lets look at an example of this: A couple are members of a club. They each have their own mobile number but share an email address. When setting them up, you would enter their mobile number only, and leave the email blank. Once you have created them in the system, you can edit their profiles and add in the contact email address for both. The system will use the Key Details field first (the login details) and if these fields are blank will use the Personal Information field (the contact details) instead.

Please enter the new member's personal information:

- a. Last Name
- b. Email Address
- c. Mobile Number
- d. DOB
- e. Gender

Add Member TAS Club 1

1 Personal Details 2 Password 3 Address 4 Club Details 5 Add Member Terms & Conditions

Personal Details *Please enter the new member's personal information*

First Name*

Last Name*

Email Address

Mobile Number

Birth Day* **Birth Month*** **Birth Year** **Gender**

NEXT

Please make sure all fields are filled in, except for duplicate email and mobiles

f.

3. Next you will be asked to create a password. Please select a strong password.

- a. Your password needs to fulfill certain requirements to be considered strong
- b. When you re-enter your password it needs to match your initial password

Add Member TAS Club 1 ADD EXISTING MEMBER

Personal Details
 2 Password
 3 Address
 4 Club Details
 5 Additional Club Details
 6 Terms & Conditions

Password *Please select a strong password*

Password

.....


- Must contain at least 8 characters
- Must contain at least one capital letter
- Must contain at least one number

When your password meets the requirements the ticks will appear green.

Re-enter Password

.....

Password must match

Powered by MemberPoint 

c.

4. Once you have set up a password you will be required to enter the new member's address details. Please enter the member's home address.

- a. Address Lines
- b. Suburb
- c. State
- d. Postcode
- e. Country

Add Member TAS Club 1 ADD EXISTING MEMBER

Personal Details
 Password
 3 Address
 4 Club Details
 5 Additional Club Details
 6 Terms & Conditions

Address *Please enter the member's home address.*

Address Line One

.....

Address Line Two

.....

Address Line Three


.....

Suburb State Postcode

.....

Country

.....

Powered by MemberPoint 

f.

5. The fourth step is to provide club details for the new member. This information will be helpful when it is necessary to create invoices against a member. Please enter the member's Club information.

- a. Financial Until
- b. Member Since

Add Member TAS Club 1 ADD EXISTING MEMBER

Personal Details
 Password
 Address
 4 Club Details
 5
 Conditions

Club Details *Please enter the member's Club information.*

Financial Until
 30

Member Since

« < Aug 2019 > »

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Powered by MemberPoint

c.

6. Should any additional club details be required, this can be provided in this step after providing the member's club details.

Add Member TAS Club 1 ADD EXISTING MEMBER

Personal Details
 Password
 Address
 Club Details
 5 Additional Club Details
 6 Terms & Conditions

Additional Club Details *Additional Details requested by the club.*

This form is empty.

Any details on this page are unique to your club. Fields will appear for information your club requires.

a.

7. In the last step you need to confirm that you have permission to add a new member to your club. Once confirmed you will be able to add the member to your club.

Add Member TAS Club 1 ADD EXISTING MEMBER

Personal Details
 Password
 Address
 Club Details
 Additional Club Details
 6 Terms & Conditions

Terms & Conditions *Please review and accept the terms and conditions.*

I agree all my details are up to date and confirming I am applying for a membership to TAS Club 1.

Tick the box to agree to the terms and conditions

a.

8. If you have provided all details correctly you will receive a notification confirming the new member. If some details are already in the system (e.g. mobile number or email) the system will bring up an error message. This usually indicates that a member already exists.

a.

Active Members

In the **active** tab of your members list you will be able to see all members that are currently active. You will also be given some of their member details without clicking into their profile and you will be able to perform the following actions:

1. You will be able to click onto the club members' name to retrieve additional information about this member.
2. You will be able to search for a particular member by name.

<input type="checkbox"/>	Last Name	First Name	Membership Number	Category	Financial Until	Member Since	Primary Club	Date Of Birth	Gender	Actions
<input type="checkbox"/>	Bogan	Nayeli	1987					1-Jan	-	...
<input checked="" type="checkbox"/>	O'Connell	Taylor	997					1-Jan	-	...
<input type="checkbox"/>	Frami	Lilla	277					1-Jan	-	...
<input type="checkbox"/>	Lesch	Jermey	877		12th Mar 2019		TAS Club 1	1-Jan	-	...
<input type="checkbox"/>	Schultz	Kelsi	127		12th Mar 2019		TAS Club 1	1-Jan	-	...
<input type="checkbox"/>	Schulist	Hildegard	337		12th Mar 2019		TAS Club 1	1-Jan	-	...

a.

3. You will be able to sort the list of members differently by clicking on the different column headers.

a.

4. You will be able to apply specific filters to only find members matching your search criteria. You will be able to filter the following parameters:
- Groups
 - Gender
 - Category
 - Financial To
 - Member Since

To open up the filter screen click on this button

Members Displaying 73 members ADD MEMBER

Active Pending Archived

FILTER Member Search Rows: 100

<input type="checkbox"/>	Last Name	First Name	Membership Number	Category	Financial Until	Member Since	Primary Club	Date Of Birth	Gender	Actions
<input type="checkbox"/>	Bogan	Nayeli	1987		13th Mar 2019		TAS Club 1	1-Jan	-	...
<input checked="" type="checkbox"/>	O'Connell	Taylor	997		12th Mar 2019		TAS Club 1	1-Jan	-	...
<input type="checkbox"/>	Frami	Lilla	277		12th Mar 2019		TAS Club 1	1-Jan	-	...
<input type="checkbox"/>	Lesch	Jermey	877		12th Mar 2019		TAS Club 1	1-Jan	-	...
<input type="checkbox"/>	Schultz	Kelsi	127		12th Mar 2019		TAS Club 1	1-Jan	-	...
<input type="checkbox"/>	Schulist	Hildegard	337		12th Mar 2019		TAS Club 1	1-Jan	-	...

f.

Members Displaying 73 members

Active Pending Archived

FILTER Member Search

Filters

- GROUPS
- GENDER
- CATEGORY
- FINANCIAL TO
- MEMBER SINCE

APPLY **CANCEL**

These are the five areas you can filter on to find certain members in your club

g.

5. You will be able to change the amount of rows displayed in your member table.

Members Displaying 73 members ADD MEMBER

Active Pending Archived

FILTER Member Search Rows: 25

<input type="checkbox"/>	Last Name	First Name	Membership Number	Category	Financial Until	Member Since	Primary Club	Date Of Birth	Gender	Actions
<input type="checkbox"/>	Bogan	Nayeli	1987		13th Mar 2019		TAS Club 1	1-Jan	-	...
<input type="checkbox"/>	O'Connell	Taylor	997		12th Mar 2019		TAS Club 1	1-Jan	-	...
<input type="checkbox"/>	Frami	Lilla	277		12th Mar 2019		TAS Club 1	1-Jan	-	...
<input type="checkbox"/>	Lesch	Jermey	877		12th Mar 2019		TAS Club 1	1-Jan	-	...
<input type="checkbox"/>	Schultz	Kelsi	127		12th Mar 2019		TAS Club 1	1-Jan	-	...
<input type="checkbox"/>	Schulist	Hildegard	337		12th Mar 2019		TAS Club 1	1-Jan	-	...

The number of rows defaults to 25, you can increase this through this drop down menu

a.

6. You will be able to perform additional actions for individual members. Additional actions are:
- Manage Groups - You will be able to add or remove the selected user from member groups that have been created.
 - Manage Fee Packages - You will be able to add or remove fee packages for the selected member. Please be aware that fee packages need to be created first before they can be assigned (Check Finance section for more details).

- c. Create Invoice - You will be able to create an invoice for the selected member if they have been assigned the required fee package (refer to the Finance section for more details).
- d. Archive Member - You will be able to archive a selected member.

Members Displaying 73 members ADD MEMBER

Active Pending Archived

FILTER Member Search

<input type="checkbox"/>	Last Name	First Name	Membership Number	Category	Financial Until	Member Since	Primary Club	Date	Actions
<input type="checkbox"/>	Bogan	Nayeli	1987		13th Mar 2019		TAS Club 1	1-Jan	-
<input checked="" type="checkbox"/>	O'Connell	Taylor	997		12th Mar 2019		TAS Club 1	1-Jan	-
<input type="checkbox"/>	Frami	Lilla	277		12th Mar 2019		TAS Club 1	1-Jan	-
<input type="checkbox"/>	Lesch	Jerney	877		12th Mar 2019		TAS Club 1	1-Jan	-
<input type="checkbox"/>	Schultz	Kelsi	127		12th Mar 2019		TAS Club 1	1-Jan	-
<input type="checkbox"/>	Schulist	Hildegard	337		12th Mar 2019		TAS Club 1	1-Jan	-
<input type="checkbox"/>	Bergnaum	Charity	1927		12th Mar 2019		TAS Club 1	1-Jan	-

e.

- 7. You will be able to bulk select all or a select group of members to perform additional actions. Additional actions are:
 - a. Create invoice - You will be able to create and send bulk invoices if the selected members have been assigned the required fees.
 - b. Add to Group - You will be able to add the selected members to a particular group that has already been created.
 - c. Update the Financial To Date - You will be able to update the financial membership date for multiple users to the same new date.

Members Displaying 73 members ADD MEMBER

Active

FILTER Member Search

Rows: 25 1 2 3 >

Create Invoice Add to Group Update Financial To Date

<input type="checkbox"/>	Last Name	First Name	Membership Number	Category	Financial Until	Member Since	Primary Club	Date Of Birth	Gender	Actions
<input type="checkbox"/>	Bogan	Nayeli	1987		13th Mar 2019		TAS Club 1	1-Jan	-	...
<input type="checkbox"/>	O'Connell	Taylor	997		12th Mar 2019		TAS Club 1	1-Jan	-	...
<input checked="" type="checkbox"/>	Frami	Lilla	277		12th Mar 2019		TAS Club 1	1-Jan	-	...
<input checked="" type="checkbox"/>	Lesch	Jerney	877		12th Mar 2019		TAS Club 1	1-Jan	-	...
<input checked="" type="checkbox"/>	Schultz	Kelsi	127		12th Mar 2019		TAS Club 1	1-Jan	-	...
<input checked="" type="checkbox"/>	Schulist	Hildegard	337		12th Mar 2019		TAS Club 1	1-Jan	-	...
<input type="checkbox"/>	Bergnaum	Charity	1927		12th Mar 2019		TAS Club 1	1-Jan	-	...

d.

Pending Members

In the **pending tab** of your members list you will be able to see all members that are currently pending review. As per the active member list, you will be given some of their member details without clicking into their profile. Many functions work the same as in the Active members tab.

The similar functions are:

1. You will be able to click onto the club members' name to retrieve additional information about this member.
2. You will be able to sort the list of members differently by clicking on the different column headers.
3. You will be able to search for a particular member by name.
4. You will be able to apply specific filters to only find members matching your search criteria.
5. You will be able to change the amount of rows displayed in your member table.

Members Displaying 3 members ADD MEMBER

Active **Pending** Archived

FILTER
Rows: 25

<input type="checkbox"/>	Last Name	First Name	Membership Number	Category	Financial To	Member Since	Primary Club	Date Of Birth	Gender	Actions
<input type="checkbox"/>	Barrows	Rashawn	1694				-	1-Jan	-	...
<input type="checkbox"/>	Segaer	Bob	3637				-	1-Jan-1900	Male	...
<input type="checkbox"/>	Little	Tracey	3220				-	2-Feb	Female	...

Functions like Filter, Searching, Sorting Members and Changing Rows work the same as in the Active Members screen

a.

6. You will be able to perform additional actions for individual members. Additional actions are:
- Approve Membership - You will be able to approve the membership for the selected member.
 - Deny Membership - You will be able to deny the membership for the selected member.

Members Displaying 3 members ADD MEMBER

Active **Pending** Archived

FILTER
Rows: 25

<input type="checkbox"/>	Last Name	First Name	Membership Number	Category	Financial To	Member Since	Primary Club	Date Of Birth	Gender	Actions
<input checked="" type="checkbox"/>	Barrows	Rashawn	1694				-	1-Jan	-	... Approve Membership Deny Membership
<input type="checkbox"/>	Segaer	Bob	3637				-	1-Jan-1900	Male	...
<input type="checkbox"/>	Little	Tracey	3220				-	2-Feb	Female	...

Clicking on this icon brings up the additional actions for each member

c.

7. You will be able to bulk select all or a select group of members to perform additional actions. Additional actions are:
- Approve Members - You will be able to bulk approve all pending members.

Members Displaying 3 members ADD MEMBER

Active

FILTER
Rows: 25

Approve Members

<input type="checkbox"/>	Last Name	First Name	Membership Number	Category	Financial To	Member Since	Primary Club	Date Of Birth	Gender	Actions
<input checked="" type="checkbox"/>	Barrows	Rashawn	1694				-	1-Jan	-	...
<input checked="" type="checkbox"/>	Segaer	Bob	3637				-	1-Jan-1900	Male	...
<input type="checkbox"/>	Little	Tracey	3220				-	2-Feb	Female	...

With multiple members selected you can approve multiple members at once

Check the boxes next to names to select multiple members at once

b.

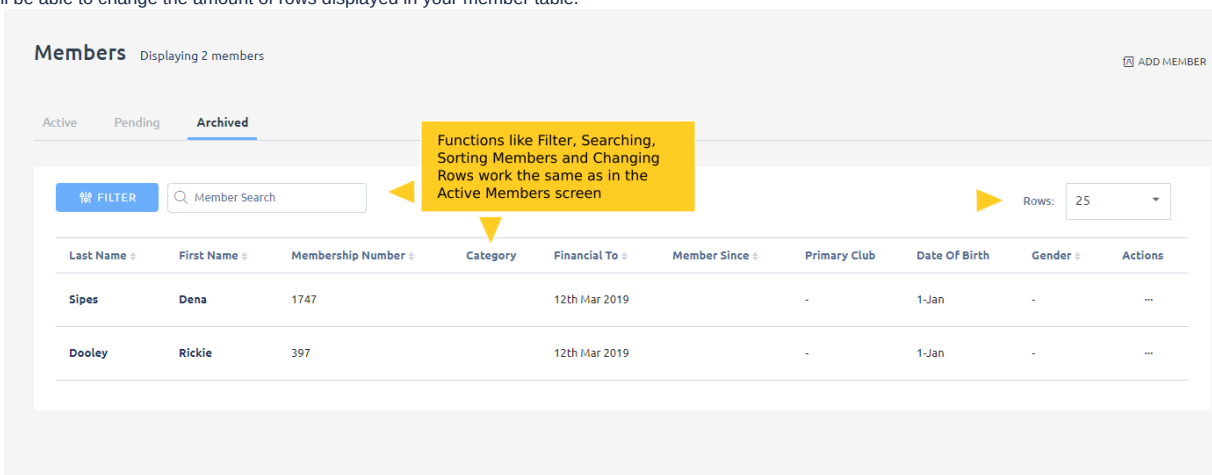
Archived Members

In the **archived tab** of your members list you will be able to see all members that are currently archived. As per the active and pending member lists, you will be given some of their member details without clicking into their profile. Many functions work the same as in the Active members tab.

The similar functions are:

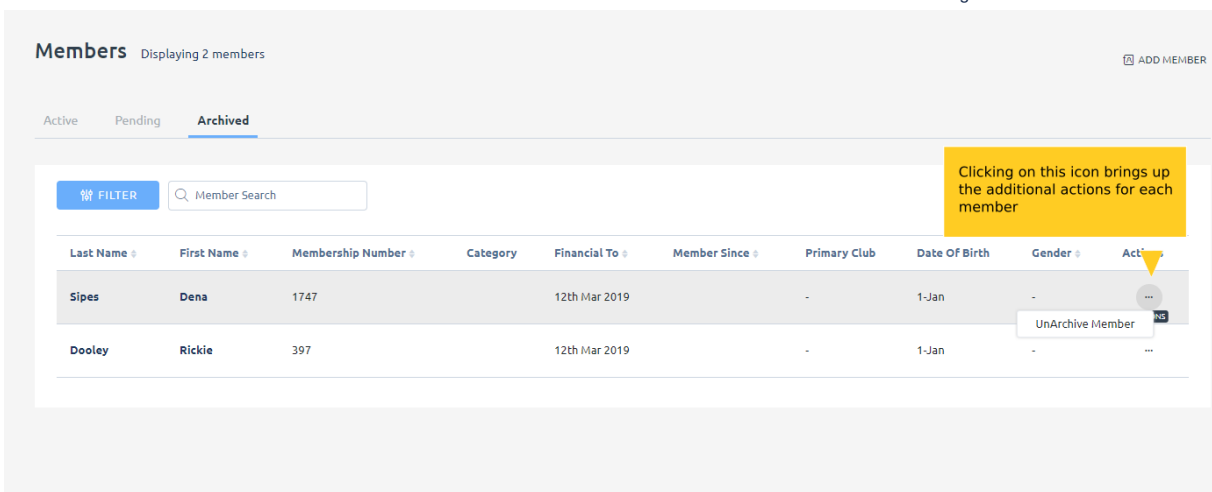
- You will be able to click onto the club members' name to retrieve additional information about this member.
- You will be able to sort the list of members differently by clicking on the different column headers.

- 3. You will be able to search for a particular member by name.
- 4. You will be able to apply specific filters to only find members matching your search criteria. (This is the same as for the active and pending members)
- 5. You will be able to change the amount of rows displayed in your member table.



a.

- 6. You will be able to perform additional actions for individual members. Additional actions are:
 - a. UnArchive Member - You will be able to unarchive the selected member and make them an active member of the club again.



b.

Member - Detailed View

In the detailed view of a member you will be able to retrieve additional information about the member as well as being able to perform additional administrative actions.

The detailed member profile is divided into five sections (tabs) - activity, details, account, notes and fees.

This is the same for active, pending and archived members.

Activity

- 1. The first tab is the **Activity tab** where you will be able to see any activity against a members' profile.

< back

TO Taylor O'Connell
MEMBERSHIP NUMBER: 997

Activity Details Account Notes Fees

Click here to switch between the various tabs for the member

Activity Wall *A chronological snapshot of all the interactions between BowlsLink and a member's account*

28th August 2019

- RS Taylor O'Connell got an invoice updated by Robert savage. August 28th at 11:59 am +10:00 #5 for TAS Club 1.
- RS Taylor O'Connell got an invoice approved by Robert savage. August 28th at 11:59 am +10:00 #5 for TAS Club 1.
- RS Taylor O'Connell got an invoice created by Robert savage. August 28th at 11:58 am +10:00 #5 for TAS Club 1.

12th March 2019

- CL Taylor O'Connell had a fee package assigned by Command Line. March 12th at 10:45 pm +11:00 Monthly Membership Package 1552391250

a.

Details

1. The second tab is the **Details** tab where you will find most member information.
2. You will be able to perform the following actions:
 - a. Manage details - edit any of the key details for this member

< back

TO Taylor O'Connell
MEMBERSHIP NUMBER: 997

Activity **Details** Account Notes Fees

ARCHIVE

Member Details *View and edit the member information, including certifications and member groups.*

Click here to edit the details for the member

EDIT MEMBER DETAILS

KEY DETAILS

Membership Club
TAS Club 1

Address
123 Fake Street

Date Of Birth
2-Jan-1962

Mobile Number
0417 002 333

Email Address
O'Connell.Taylor@dev.bowlslink.com.au

Receives Invoices By
Mail

Gender
Male

MEMBERSHIP INFORMATION

Member Since
This member currently does not have a start date.

Financial Until
March 13th, 2019

Membership Category
No categories have been assigned to this member

Status
Active

MEMBER GROUPS
There are no member groups

CERTIFICATIONS
This member currently does not have any certifications pending or verified.

EMAIL CAMPAIGN CHANNELS
There are no email campaign channels assigned.

b.

< back

Edit Member Taylor O'Connell

[Key Details](#)
[Personal Information](#)
[Membership Details](#)
[Additional Details](#)

Key Details *Update the key details for the member's account.*

First Name*

Last Name*

Email Address

Mobile Number

Birth Day* **Birth Month*** **Birth Year**

Click through the tabs here to access the various details for the member

c.

3. Edit Category - add or remove a category for this member

TO Taylor O'Connell
MEMBERSHIP NUMBER: 997

[Activity](#)
[Details](#)
[Account](#)
[Notes](#)
[Fees](#)
ARCHIVE

Member Details *View and edit the member information, including certifications and member groups.* EDIT MEMBER DETAILS

KEY DETAILS

Membership Club
TAS Club 1

Address
123 Fake Street

Date Of Birth
2-Jan-1962

Mobile Number
0417 002 333

Email Address
O'Connell.Taylor@dev.bowlslink.com.au

Receives Invoices By
Mail

MEMBERSHIP INFORMATION

Member Since
This member currently does not have a start date.

Financial Until
March 13th, 2019

Membership Category
No categories have been assigned to this member

Status
Active

MEMBER GROUPS

CERTIFICATIONS
This member currently does not have any certifications pending or verified.

EMAIL CAMPAIGN CHANNELS
There are no email campaign channels assigned.

The member has no categories, click here to assign one

Powered by MemberPoint **m.**

a.

TO Taylor O'Connell
MEMBERSHIP NUMBER: 997

Activity Details Account Notes Fees

Member Details *View and edit the member information, including certifications and member groups.*

KEY DETAILS

Membership Club
TAS Club 1

Address
123 Fake Street

Date Of Birth
2-Jan-1962

Mobile Number
0417 002 333

MEMBERSHIP INFORMATION

Member Since
This member currently does not have a start date.

Financial Until
March 13th, 2019

Membership Category
No categories have been assigned to this member

CERTIFICATIONS
This member currently does not have any certifications pending or verified.

EMAIL CAMPAIGN CHANNELS
There are no email campaign channels assigned.

Assign Member Category

Member Category*
Full Member

ASSIGN CANCEL

Click here to open the list of categories and select one

Click assign to set the category for the member

b.

4. Add to Group - you can add a member to a specific group and you will also be able to remove a member from a member group

TO Taylor O'Connell
MEMBERSHIP NUMBER: 997

Activity Details Account Notes Fees

Member Details *View and edit the member information, including certifications and member groups.*

KEY DETAILS

Membership Club
TAS Club 1

Address
123 Fake Street

Date Of Birth
2-Jan-1962

Mobile Number
0417 002 333

Email Address
O'Connell.Taylor@dev.bowlslink.com.au

Receives Invoices By
Mail

Gender
Male

MEMBERSHIP INFORMATION

Member Since
This member currently does not have a start date.

Financial Until
March 13th, 2019

Membership Category
Full Member

Status
Active

CERTIFICATIONS
This member currently does not have any certifications pending or verified.

EMAIL CAMPAIGN CHANNELS
There are no email campaign channels assigned.

MEMBER GROUPS
There are no member groups assigned.

The member has no groups, click here to assign one

a.

TO Taylor O'Connell
MEMBERSHIP NUMBER: 997

Activity Details Account Notes Fees

Member Details *View and edit the member information, including certifications and member groups.*

KEY DETAILS

Membership Club
TAS Club

Address
123 Fake Street

Date Of Birth
2-Jan-1962

Mobile Number
0417 002 333

Email Address
O'Connell.Taylor@dev.bowlslink.com.au

MEMBERSHIP INFORMATION

Member Since
This member currently does not have a start date.

Financial Until
March 13th, 2019

Membership Category
Full Member

Status
Active

CERTIFICATIONS

This member currently does not have any certifications pending or verified.

EMAIL CAMPAIGN CHANNELS

There are no email campaign channels assigned.

MEMBER GROUPS

Group Assignments

Select Member Group*
Pennant Team

ASSIGN CANCEL

Click here to open the list of groups and select one

Click assign to set the group for the member

b.

5. Add Certification - you will be able to add a certification to the member

TO Taylor O'Connell
MEMBERSHIP NUMBER: 997

Activity Details Account Notes Fees

Member Details *View and edit the member information, including certifications and member groups.*

KEY DETAILS

Membership Club
TAS Club 1

Address
123 Fake Street

Date Of Birth
2-Jan-1962

Mobile Number
0417 002 333

Email Address
O'Connell.Taylor@dev.bowlslink.com.au

Receives Invoices By
Mail

Gender
Male

MEMBERSHIP INFORMATION

Member Since
This member currently does not have a start date.

Financial Until
March 13th, 2019

Membership Category
Full Member

Status
Active

CERTIFICATIONS

This member currently does not have any certifications pending or verified.

EMAIL CAMPAIGN CHANNELS

There are no email campaign channels assigned.

MEMBER GROUPS

Pennant Team

The member has no certifications, click here to assign one

a.

TO Taylor O'Connell
MEMBERSHIP NUMBER: 997

Activity Details Account Notes Fees

Member Details *View and edit the member information, including certifications and member groups.*

KEY DETAILS

Membership Club
TAS Club 1

Address
123 Fake Street

Date Of Birth
2-Jan-1962

Mobile Number
0417 002 333

Email Address
O'Connell.Taylor@dev.bowlslink.com.au

MEMBERSHIP INFORMATION

Member Since
This member currently does not have a start date.

Financial Until
March 13th, 2019

Membership Category
Full Member

Status
Active

CERTIFICATIONS

This member currently does not have any certifications pending or verified.

EMAIL CAMPAIGN CHANNELS

There are no email campaign channels assigned.

MEMBER GROUPS

Add Certification

Select a certification you currently hold from the list below.

Certification*
RSA (Alcohol Service)

Valid Until
Select Date

Supporting Documentation
Choose File | No file chosen

CREATE CANCEL

Click here to open the list of certifications and select one

Certifications can have extra details, such as expiry dates. You can also upload a photo or scan of the certification

b.

Taylor O'Connell
MEMBERSHIP NUMBER: 997

Activity **Details** Account Notes Fees

Member Details *View and edit the member information, including certifications and member groups.*

KEY DETAILS

Membership Club
TAS Club 1

Address
123 Fake Street

Date Of Birth
2-Jan-1962

Mobile Number
0417 002 333

Email Address
O'Connell.Taylor@dev.bowlslink.com.au

Receives Invoices By
Mail

Gender
Male

MEMBERSHIP INFORMATION

Member Since
This member currently does not have a start date.

Financial Until
March 13th, 2019

Membership Category
Full Member

Status
Active

MEMBER GROUPS
Pennant Team

CERTIFICATIONS

RSA (Alcohol Service)
expires 18/08/20

Club Coach
expires

EMAIL CAMPAIGN CHANNELS

There are no email campaign channels assigned.

Members can have multiple certifications assigned to their profile

c.

6. Add to Group - you will be able to add the member to an Email Campaign Channel and also remove that member for the assigned channel

Taylor O'Connell
MEMBERSHIP NUMBER: 997

Activity **Details** Account Notes Fees ARCHIVE

Member Details *View and edit the member information, including certifications and member groups.* EDIT MEMBER DETAILS

KEY DETAILS

Membership Club
TAS Club 1

Address
123 Fake Street

Date Of Birth
2-Jan-1962

Mobile Number
0417 002 333

Email Address
O'Connell.Taylor@dev.bowlslink.com.au

Receives Invoices By
Mail

MEMBERSHIP INFORMATION

Member Since
This member currently does not have a start date.

Financial Until
March 13th, 2019

Membership Category
No categories have been assigned to this member

Status
Active

MEMBER GROUPS

CERTIFICATIONS

This member currently does not have any certifications pending or verified.

EMAIL CAMPAIGN CHANNELS

There are no email campaign channels assigned.

The member has no categories, click here to assign one

Powered by MemberPoint

a.

Taylor O'Connell
MEMBERSHIP NUMBER: 997

Activity **Details** Account Notes Fees

Member Details *View and edit the member information, including certifications and member groups.*

KEY DETAILS

Membership Club
TAS Club 1

Address
123 Fake Street

Date Of Birth
2-Jan-1962

Mobile Number
0417 002 333

Email Address
O'Connell.Taylor@dev.bowlslink.com.au

MEMBERSHIP INFORMATION

Member Since
This member currently does not have a start date.

Financial Until
March 13th, 2019

Membership Category
Full Member

Status
Active

CERTIFICATIONS

RSA (Alcohol Service)
expires 18/08/20

Club Coach
expires

EMAIL CAMPAIGN CHANNELS

There are no email campaign channels assigned.

Group Assignments

Select Email Campaign Channel*

Club Newsletter

ASSIGN CANCEL

Click here to open the list of email campaigns and select one

Click assign to set the email campaign for the member

b.

7. Archive and Request Transfer - here you will be able to archive a member and you will also be able to request a transfer of a member to your club being the primary club.

Taylor O'Connell
MEMBERSHIP NUMBER: 997

Activity **Details** Account Notes Fees

Click here to archive this member [ARCHIVE](#)

Member Details *View and edit the member information, including certifications and member groups.* [EDIT MEMBER DETAILS](#)

KEY DETAILS

Membership Club
IAS Club 1

Address
123 Fake Street

Date Of Birth
2-Jan-1962

Mobile Number
0417 002 333

Email Address
O'Connell.Taylor@dev.bowlslink.com.au

Receives Invoices By
Mail

MEMBERSHIP INFORMATION

Member Since
This member currently does not have a start date.

Financial Until
March 13th, 2019

Membership Category
No categories have been assigned to this member

Status
Active

CERTIFICATIONS
This member currently does not have any certifications pending or verified.

EMAIL CAMPAIGN CHANNELS
There are no email campaign channels assigned.

MEMBER GROUPS

Powered by MemberPoint

a.

Account

The third tab is the Account tab where you will be able to view all the invoices associated to this particular member. You will be able to find invoice information and perform the following actions:

1. You will be able to see any monies owing by this member

Taylor O'Connell
MEMBERSHIP NUMBER: 997

Activity Details **Account** Fees

Click here to access the account tab for the member

Member Account *View all the invoices associated to this member.* [CREATE CUSTOM INVOICE](#)

BALANCE DUE
\$1,470.00 **The account balance for the member**

INVOICES	Date Issued	Sent	Due Date	Status	Amount	Amount Paid	
5	28th Aug 2019	●	31st Aug 2019	OUTSTANDING	\$1,470.00	\$0.00	...

a.

2. You will be able to perform specific actions against an invoice for this member:
 - a. Enter Payment
 - b. Send
 - c. Download
 - d. Void
 - e. View Payments

< back

TO Taylor O'Connell
MEMBERSHIP NUMBER: 997

Activity Details **Account** Notes Fees

Member Account *View all the invoices associated with this membership account.* CREATE CUSTOM INVOICE

BALANCE DUE
\$1,470.00

INVOICES	Date Issued	Sent	Due Date	Status	Amount	Amount Paid
5	28th Aug 2019	•	31st Aug 2019	OUTSTANDING	\$1,470.00	\$0.00

Click here to access the invoice actions for the member

- Enter payment
- Send
- Download
- Void
- View Payments

f.

3. Enter payment - If your club has received money from this member you will be able to record the receipt against the correct invoice.

< back

TO Taylor O'Connell
MEMBERSHIP NUMBER: 997

Activity Details **Account** Notes Fees

Member Account *View all the invoices associated with this membership account.*

BALANCE DUE
\$1,470.00

INVOICES	Date Issued	Sent	Due Date	Status	Amount	Amount Paid
5	28th Aug 2019	•	31st Aug 2019	OUTSTANDING	\$1,470.00	\$0.00

Select the type of payment

Enter the amount of the payment here. The payment details below will update. Click Pay to complete

Record Payment

Payment Method
Cash

Amount
\$ 185.00

Payment Overview

Invoice Total	\$1,470.00
Paying	\$185.00
Sub-Total	\$185.00
Surcharges	\$0.00
Total Payment	\$185.00
Remainder after payment	\$1,285.00

PAY CANCEL

a.

4. Send - If a new invoice has been created for this member but hasn't been sent yet you will be able to send this invoice.

a.

< back

TO Taylor O'Connell
MEMBERSHIP NUMBER: 997

Activity Details **Account** Notes Fees

Member Account *View all the invoices associated with this membership account.* CREATE CUSTOM INVOICE

BALANCE DUE
\$1,470.00

INVOICES	Date Issued	Sent	Due Date	Status	Amount	Amount Paid
5	28th Aug 2019	•	31st Aug 2019	OUTSTANDING	\$1,470.00	\$0.00

Click send to email an invoice for the amount owing to the member

- Enter payment
- Send
- Download
- Void
- View Payments

5. Download - You can download a PDF file of the invoice.

< back

TO Taylor O'Connell
MEMBERSHIP NUMBER: 997

Activity Details **Account** Notes Fees

Member Account *View all the invoices associated with this membership account.* [CREATE CUSTOM INVOICE](#)

BALANCE DUE
\$1,470.00

INVOICES	Date Issued	Sent	Due Date	Status	Amount	Amount Paid
5	28th Aug 2019	●	31st Aug 2019	OUTSTANDING	\$1,470.00	\$0.00

Click download to download to your computer a PDF version of the invoice

- Enter payment
- Send
- Download
- Void
- View Payments

a.

6. Void - If an invoice is no longer required to be paid by a member you will be able to cancel the invoice here.

< back

TO Taylor O'Connell
MEMBERSHIP NUMBER: 997

Activity Details **Account** Notes Fees

Member Account *View all the invoices associated with this membership account.* [CREATE CUSTOM INVOICE](#)

BALANCE DUE
\$1,470.00

INVOICES	Date Issued	Sent	Due Date	Status	Amount	Amount Paid
5	28th Aug 2019	●	31st Aug 2019	OUTSTANDING	\$1,470.00	\$0.00

Click void to cancel this invoice for the member

- Enter payment
- Send
- Download
- Void
- View Payments

a.

A confirmation screen will appear, to check you want to void the invoice

👉

Confirm Void Invoice

Are you sure you want to void invoice '5'?

VOID **CANCEL**

b.

7. View payments - If any payments have been entered against a particular invoice you will be able to see these records here and you will also be able to void an existing payment record.

< back

TO Taylor O'Connell
MEMBERSHIP NUMBER: 997

Activity Details **Account** Notes Fees

Member Account *View all the invoices associated with this membership account.* [CREATE CUSTOM INVOICE](#)

BALANCE DUE
\$1,470.00

INVOICES	Date Issued	Sent	Due Date	Status	Amount	Amount Paid
5	28th Aug 2019	●	31st Aug 2019	OUTSTANDING	\$1,470.00	\$0.00

Enter payment
Send
Download
Void
View Payments

Click view payments to see any payment made towards this invoice

a.

< back

TO Taylor O'Connell
MEMBERSHIP NUMBER: 997

Activity Details **Account** Notes Fees

Member Account *View all the invoices associated with this membership account.*

BALANCE DUE
\$1,285.00

INVOICES	Date Issued	Sent	Due Date	Status	Amount
5	28th Aug 2019	●	31st Aug 2019	OUTSTANDING	\$1,470.00

Payment #5
\$185.00 CASH
Paid By: Taylor O'Connell September 03, 2019 at 11:49
CANCEL

Details of any payments made will be shown here

You can void this payment by clicking on this icon

b.

8. You will be able to create a custom invoice should this be necessary. This will direct you to the finance section to finalise the creation of a custom invoice.

< back

TO Taylor O'Connell
MEMBERSHIP NUMBER: 997

Activity Details **Account** Notes Fees

Member Account *View all the invoices associated with this membership account.* [CREATE CUSTOM INVOICE](#)

BALANCE DUE
\$1,470.00

INVOICES	Date Issued	Sent	Due Date	Status	Amount	Amount Paid
5	28th Aug 2019	●	31st Aug 2019	OUTSTANDING	\$1,470.00	\$0.00

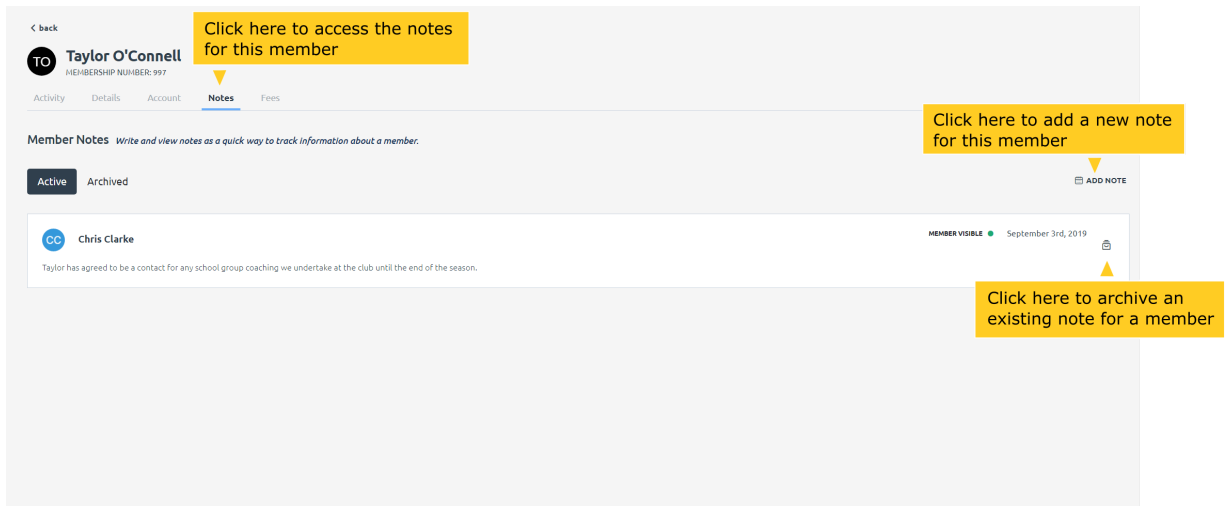
Enter payment
Send
Download
Void
View Payments

Click here to create a custom invoice for this member. This will open up the finance module

a.

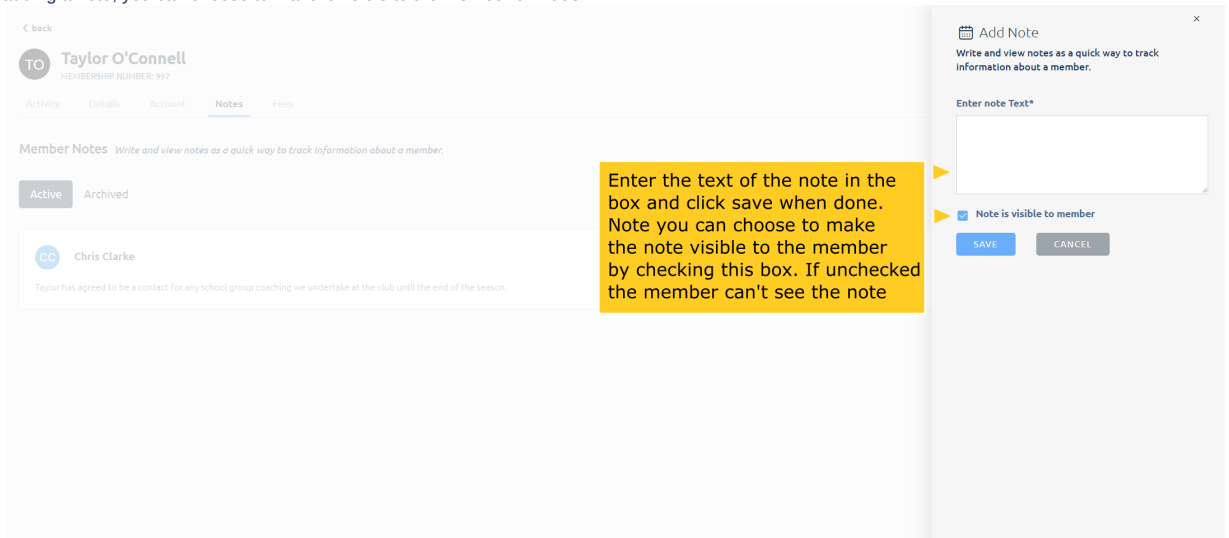
Notes

- The fourth tab is the **Notes tab** where you will be able to write and view notes as a quick way to track information about a member. You will be able to perform the following actions:
 - Add notes for a member
 - Archive existing notes that are no longer required.



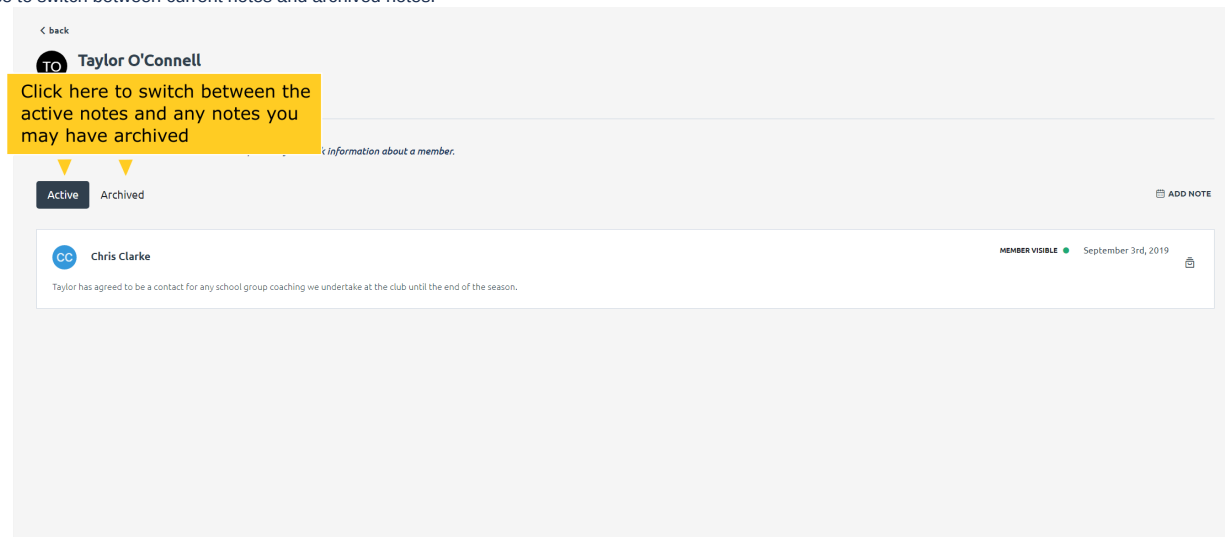
c.

2. When adding a note, you can choose to make it visible to the member or hidden.



a.

3. Choose to switch between current notes and archived notes.



a.

Fees

1. The last tab is the **Fees tab** where you will be able to see all allocated fees the member has to pay to the club. You will be able to perform the following actions:
 - a. Assign Fee - If you need to add any additional fees that are not already assigned to the member. Please note that fees need to be part of a fee package which needs to be created in the finance section first before they can get assigned to a member. (Please check the Finance section for further details)
 - b. Remove Fee - If a member has fees assigned already you will be able to remove them by clicking the minus symbol next to the fee you want to remove.

TO Taylor O'Connell
MEMBERSHIP NUMBER: 997

Activity Details Account Notes **Fees**

Fees *Manage the fee packages assigned to this member*

Click here to assign a new fee to the member

ASSIGN FEE

Title	Type	Next Bill Date	Valid for	Price incl GST	GST
Monthly Membership Package 1552391250		1st May 2019	1 month	\$245.00	\$22.27
Monthly Membership 1552391250	MEMBERSHIP 1552391250			\$185.00	\$16.82
Club Shirt	CLUB SHIRT			\$60.00	

Click here to remove this fee from the member

C.

Groups & Categories

When you are in the groups & categories section you will be provided with a list of all the groups and categories you have already created for your club.

BOWSLINK TAS Club 1 CHRIS CLARKE

Membership Members **Groups & Categories** Certifications Transfers Exports Clubs Greens Competitions Email Campaigns Finances

Member Groups **Member Groups** TAS Club 1 ADD MEMBER GROUP

Member Groups *Groups allow clubs to organise members into flexible sets that can be used for email communication*

Name	Description	Email Channel	Members	Actions
Club Newsletter	Club Newsletter	●	1 member	...
Club Board	Club Board	●	1 member	...
Pennant Team	Pennant Team	●	1 member	...

Click here to select the groups and categories for your club

The list is divided into two sections (tabs) - Member Groups and Member Categories.

BOWSLINK TAS Club 1 CHRIS CLARKE

Membership Members **Groups & Categories** Certifications Transfers Exports Clubs Greens Competitions Email Campaigns Finances

Member Groups **Member Groups** TAS Club 1 ADD MEMBER GROUP

Member Groups **Member Groups** **Member Categories** *Members into flexible sets that can be used for email communication*

Name	Description	Email Channel	Members	Actions
Club Newsletter	Club Newsletter	●	1 member	...
Club Board	Club Board	●	1 member	...
Pennant Team	Pennant Team	●	1 member	...

Member groups and member categories

You will also be given the functionality to add new member groups and new member categories.

For each member group or member category listed here you will be able to perform additional actions.

Member Groups

In the **member groups tab** of your list you will be able to see all member groups that have already been created. You will also be given an overview of some of the groups' details. Furthermore, you will be able to perform the following actions:

1. You will be able to add new member groups.
2. You will be able to edit or delete existing member groups (**Attention:** Groups can only be deleted when no members are associated to this category).

Member Groups TAS Club 1

Click here to add a new member group ➔ ADD MEMBER GROUP

Member Groups Member Categories

Member Groups Groups allow clubs to organise members into flexible sets that can be used for email communication

Click here to edit or delete an existing member group

Name	Description	Email Channel	Members	Actions
Club Newsletter	Club Newsletter	●	1 member	⋮
Club Board	Club Board	●	1 me	⋮
Pennant Team	Pennant Team	●	1 member	⋮

a.

b. Details that can be edited for a member group

Member Groups TAS Club 1

Member Groups Member Categories

Member Groups Groups allow clubs to organise members into flexible sets that can be used for email communication

Details for a member group which can be updated

Edit a Member Group

Fill in the form below to edit the member group.

Group Name*
Club Newsletter

Description*
Club Newsletter

UPDATE CANCEL

c.

Member Categories

In the **member categories tab** of your list you will be able to see all member categories that have already been created. You will also be given an overview of some of the categories' details. Furthermore, you will be able to perform the following actions:

1. You will be able to add new member categories.
2. You will be able to edit or delete existing member categories (**Attention:** Categories can only be deleted when no members are associated to this category).

Member Categories TAS Club 1

Click here to add a new member category ➔ ADD MEMBER CATEGORY

Member Groups **Member Categories**

Member Categories Create and manage the club categories, membership or otherwise, that best reflects your club's needs

Click here to edit or delete an existing member category

Name	Description	Playing Rights	Assigned Members	Actions
Full Member	Full Member	●	1 member	⋮
Social member	Social member	●	0 members	⋮

a.

b. Details that can be edited for a member category

Member Categories TAS Club 1

Member Groups **Member Categories**

Member Categories Create and manage the club categories, membership or otherwise, that best reflects your club's needs

Details for a member category which can be updated

Edit Member Category

Name*
Social member

Description*
Social member

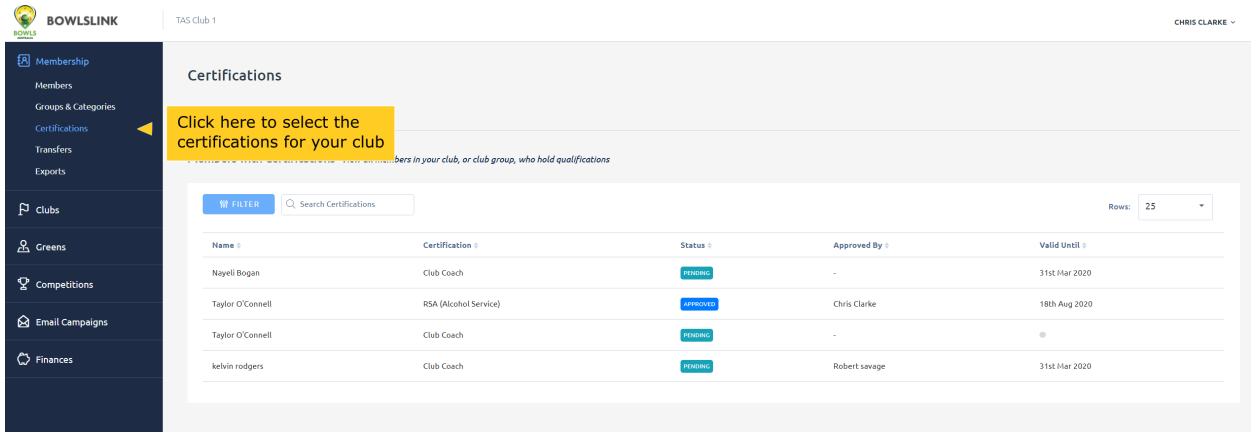
Includes Playing Rights

SAVE CANCEL

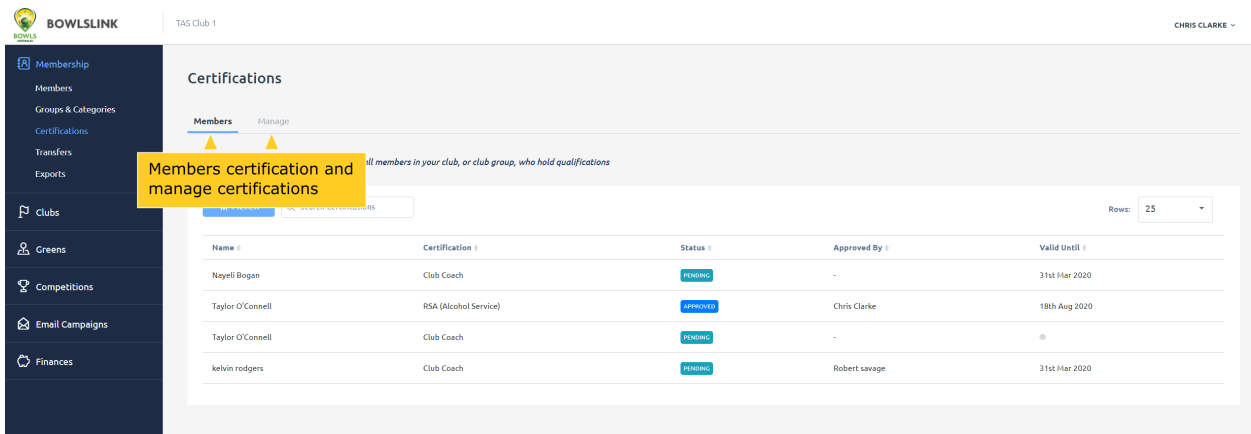
c.

Certifications

When you are in the certifications section you will be provided with a list of all the members currently holding a certification in your club.



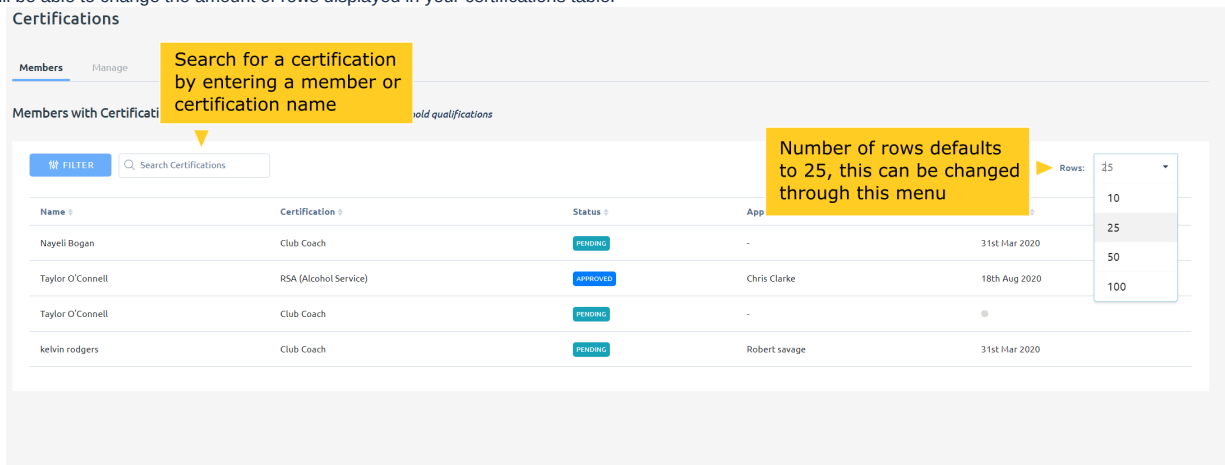
The list is divided into two sections (tabs) - members and manage.



Members

For each member listed here you will be able to retrieve their certification status, the validity of their certification and the certification type. You will be able to perform the following actions:

1. You will be able to search for a particular certification by name.
2. You will be able to change the amount of rows displayed in your certifications table.



3. You will be able to apply specific filters to only find certifications matching your search criteria.

Certifications

Click here to open the filter options

Members in your club, or club group, who hold qualifications

Filter Search Certifications Rows: 25

Name	Certification	Status	Approved By	Valid Until
Nayeli Bogan	Club Coach	PENDING	-	31st Mar 2020
Taylor O'Connell	RSA (Alcohol Service)	APPROVED	Chris Clarke	18th Aug 2020
Taylor O'Connell	Club Coach	PENDING	-	⊖
kelvin rogers	Club Coach	PENDING	Robert savage	31st Mar 2020

a.

4. The filter options available are:

- a. Expires Before
- b. Certification Title
- c. Assignee Name
- d. Approver Name
- e. Status

Enter details to filter on in the appropriate fields. Click apply to filter

Filters

EXPIRES BEFORE

Select Date

CERTIFICATION TITLE

ASSIGNEE NAME

APPROVER NAME

STATUS

Select Status

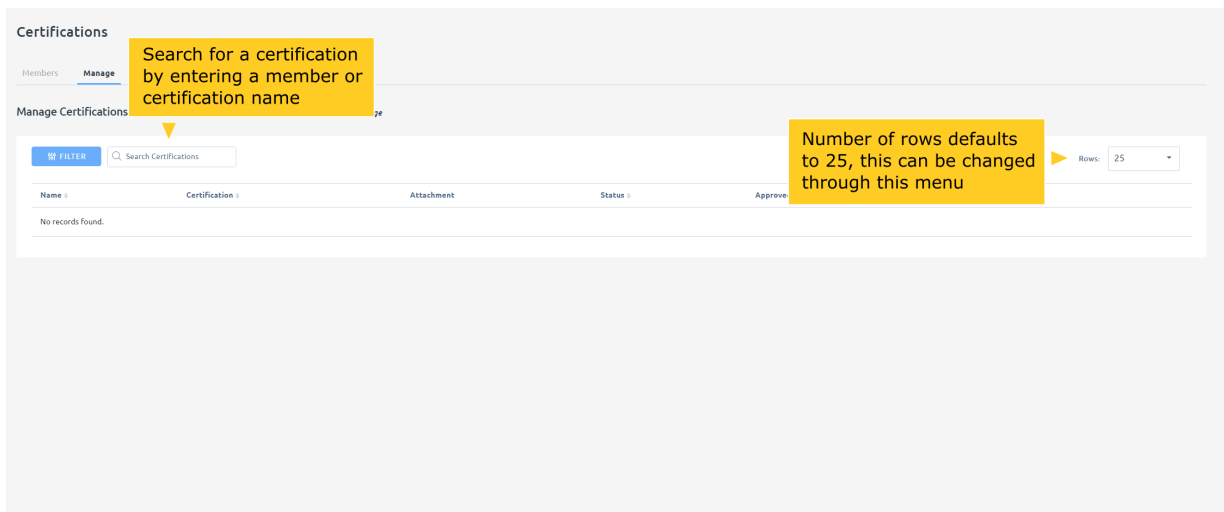
APPLY **CANCEL**

f.

Manage

In the manage section of certifications you will be able to approve, extend and revoke certifications you have permission to manage. If there are any certifications that require review by you they will be listed here.

1. You will be able to search for a particular certification by name.
2. You will be able to change the amount of rows displayed in your certifications table.
3. Filter functions are also available, functioning the same as the Members Certification tab.



a.

Dual Membership & Transfers

To understand how the transfers section works, we need to understand the dual membership functions as well.

As a club administrator, you can:

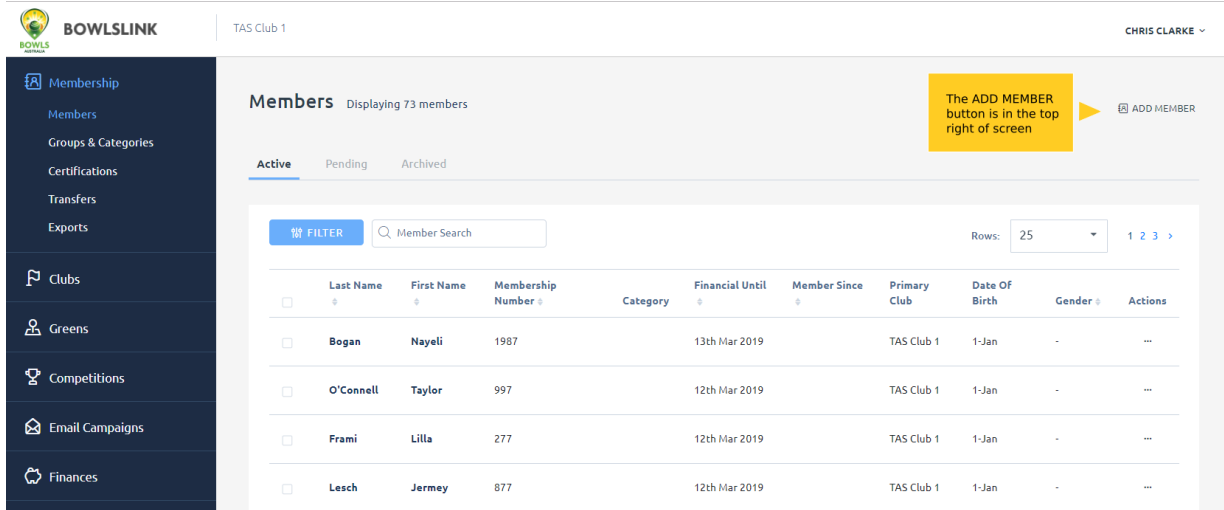
- Request dual membership for a member to join your club.
- Approve or deny current members to be dual members with another club. Note that this is done via an email to your account, not within BowsLink.
- Request for a transfer of primary membership to your club.
- Approve transfers away from your club.

The key concept you will need to understand with transfers is this: Members must be **dual members** of two clubs, before they can then transfer their **primary membership** from one club to the other. Therefore setting up dual membership is required for before you can transfer the primary membership.

The transfer section is used to manage members transferring their primary club membership away from your club.

Dual Membership

1. To request a member to join your club as a dual member, first go back to the members screen, and click on the add member button.



a.

2. Instead of filling in details, click on the add existing member button. This is adding a member who already exists as a member at a different club.

Add Member TAS Club 1 ADD EXISTING MEMBER

1 Personal Details 2 Password 3 Address 4 Club Details 5 Additional

Personal Details *Please enter the new member's personal information*

First Name* Last Name*

Email Address

Mobile Number

Birth Day* Birth Month* Birth Year Gender

Click here to add a member from another club

a.

3. You will need to provide details to identify the correct member. The easiest form of identification is the existing national ID number for the member. Otherwise you will need to provide either - Email address, last name and date of birth or - Mobile phone, last name and date of birth. Scroll to the bottom of the screen and click search.

Please enter the new member's details in **one of the options** below to ensure they haven't previously registered in the BowlsLink system.

National ID Number

OR

Email Address

Last Name

DATE OF BIRTH

Day **Month** **Year optional**

Enter the ID details for the member

Enter the details for the member in these fields, you will need to complete all three to search

a.

4. Once the correct member has been identified, click on invite to send an invitation for membership.

Add Member TAS Club 1 ADD NEW MEMBER

Found 1 Result

Name	Email Address	Mobile Number	National Id
Merrill Camacho	diam@sitamet.edu		3676

Click invite to add the member

BACK

a.

5. You will see a notification message on the screen. An approval request is now sent to the member, the administrator of their primary club and their state representative. When one of these three approves the membership, they will be added to your member list. Note it is not necessary for all three requests to be approved, any one of the three is sufficient.

Add Member TAS Club 1

An application has been sent to Merrill Camacho, Their current primary club, and state representative. Once the application has been approved, Merrill will appear in your pending membership tab.

a.

6. Once approved, the new member will appear in the pending members section and you will be able to approve their membership from the menu.

Members Displaying 4 members ADD MEMBER

Active **Pending** Archived

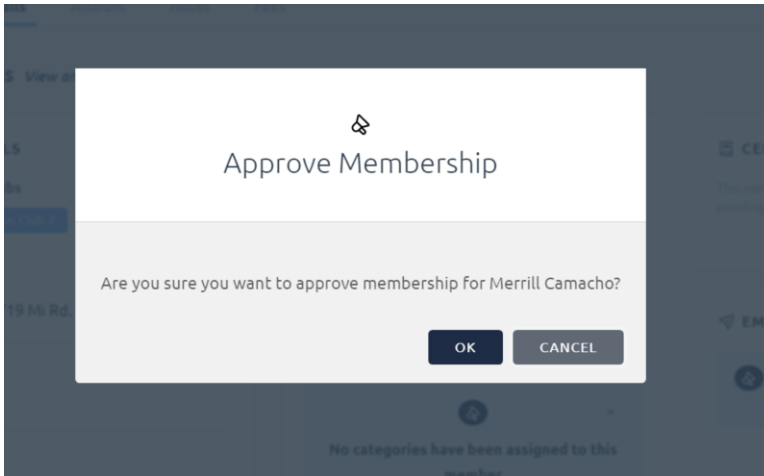
Member will appear in the pending tab

Click here to select actions for member

	Last Name	First Name	Membership Number	Category	Financial To	Member Since	Primary Club	Date of Birth	Gender	Actions
<input type="checkbox"/>	Camacho	Merrill	3676				-	3-March	Male	<ul style="list-style-type: none"> Approve Membership Deny Membership
<input type="checkbox"/>	Barrows	Rashawn	1694				-	1-Jan		
<input type="checkbox"/>	Segaer	Bob	3637				-	1-Jan-1900	Male	
<input type="checkbox"/>	Little	Tracey	3220				-	2-Feb	Female	

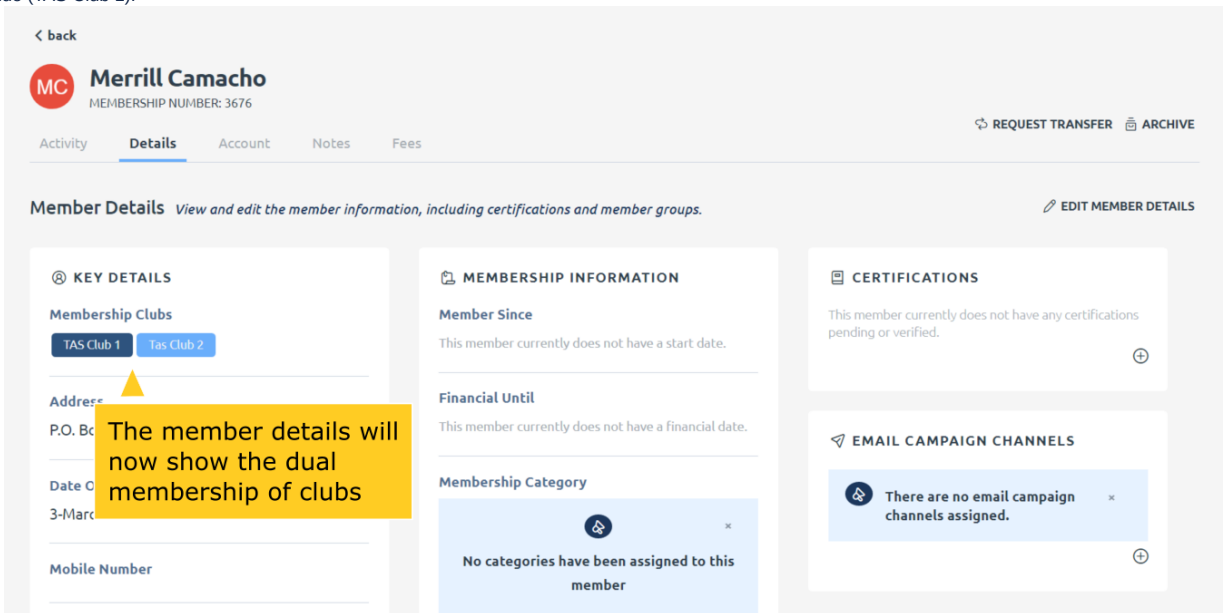
a.

7. When you select approval, you will be asked to confirm the membership.



a.

8. The members details will now show the dual membership of clubs, with the light blue club being the primary club (Tas Club 2). All other clubs will be shown in dark blue (TAS Club 1).

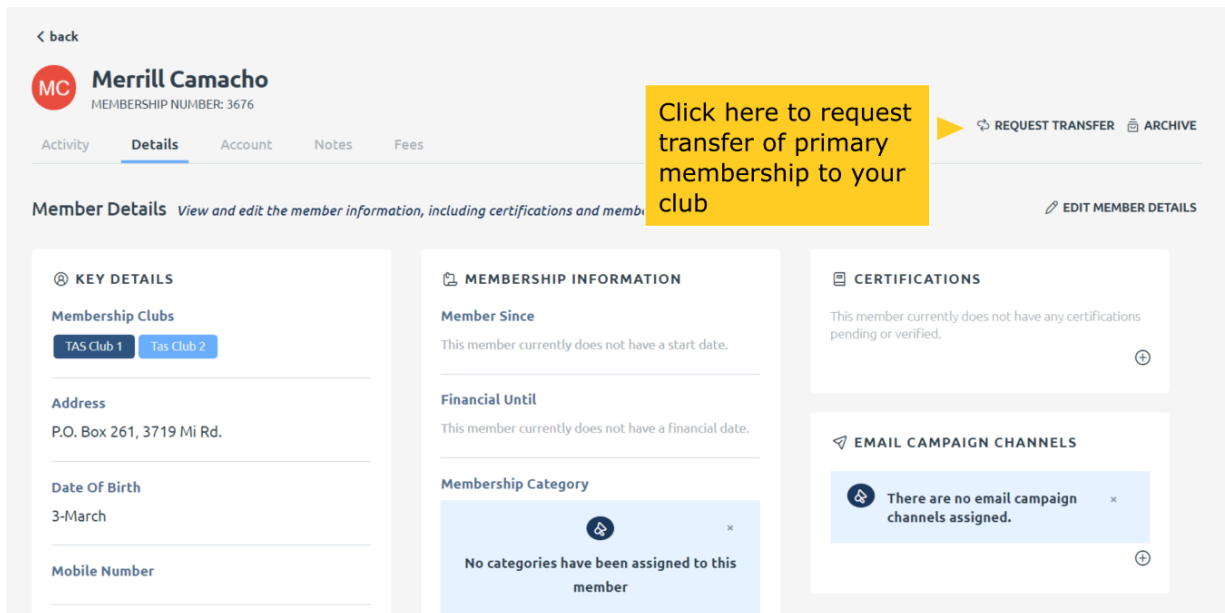


a.

Primary Club Membership

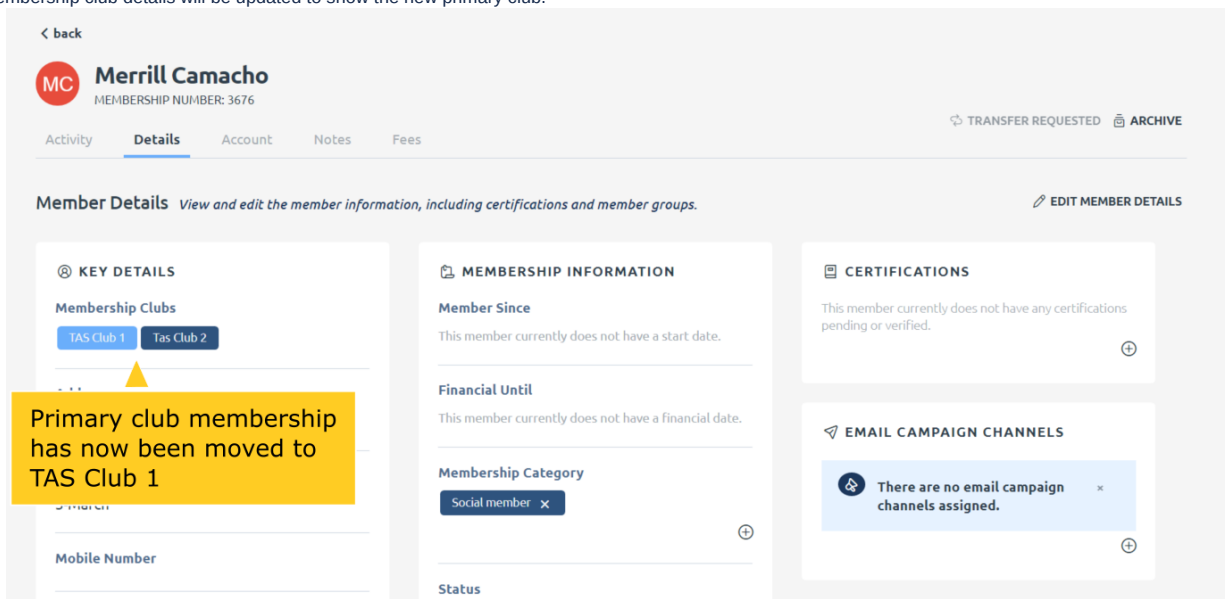
To request that a member's primary membership is moved to your club, you will need to have already completed the steps above to setup the member as a dual member.

1. Click on the request transfer button on the members profile.



a.

- This will place a request with the current primary club to approve a transfer. If the current club approves the transfer, it will appear in the transfer section, and the membership club details will be updated to show the new primary club.

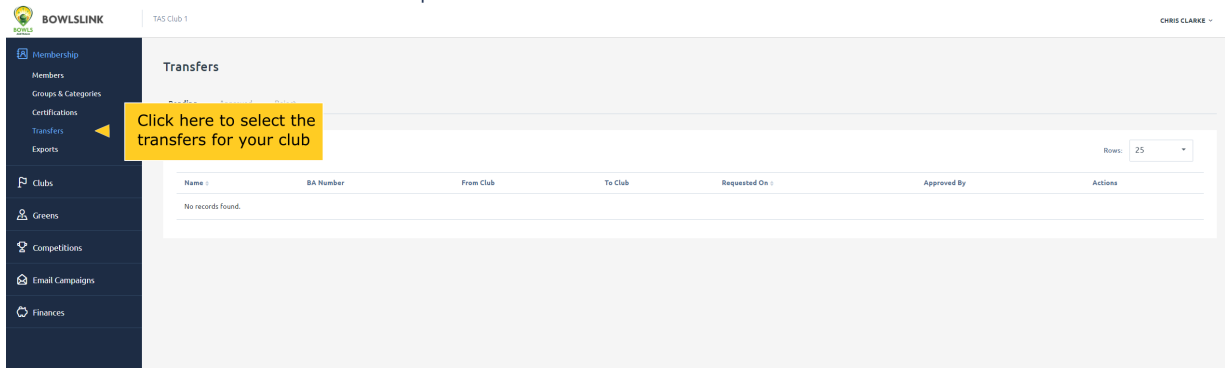


a.

Transfers

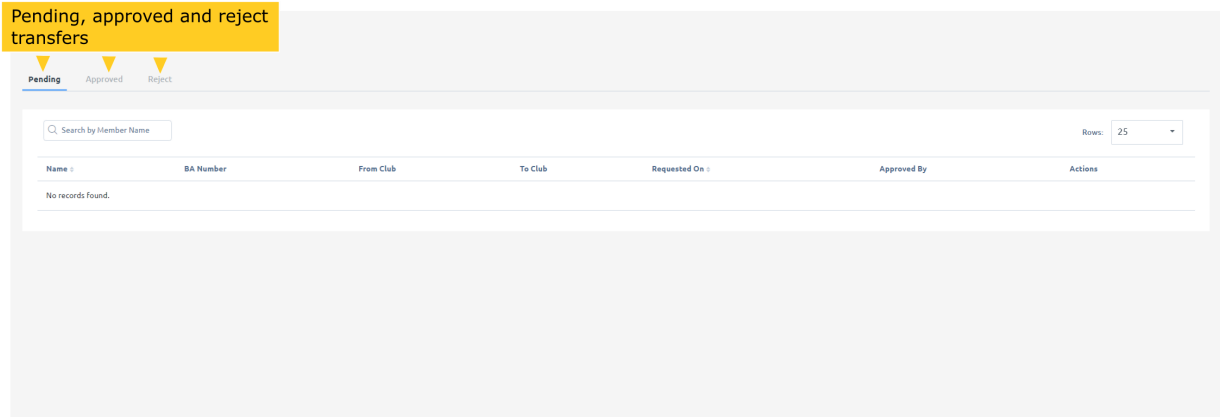
The transfer section is used to manage the approval or rejection of transfers from your club, to be primary members of other clubs. It also provides a history of transfers to your club, where dual members have become a primary member of your club.

- You can access the transfers section under the membership menu.



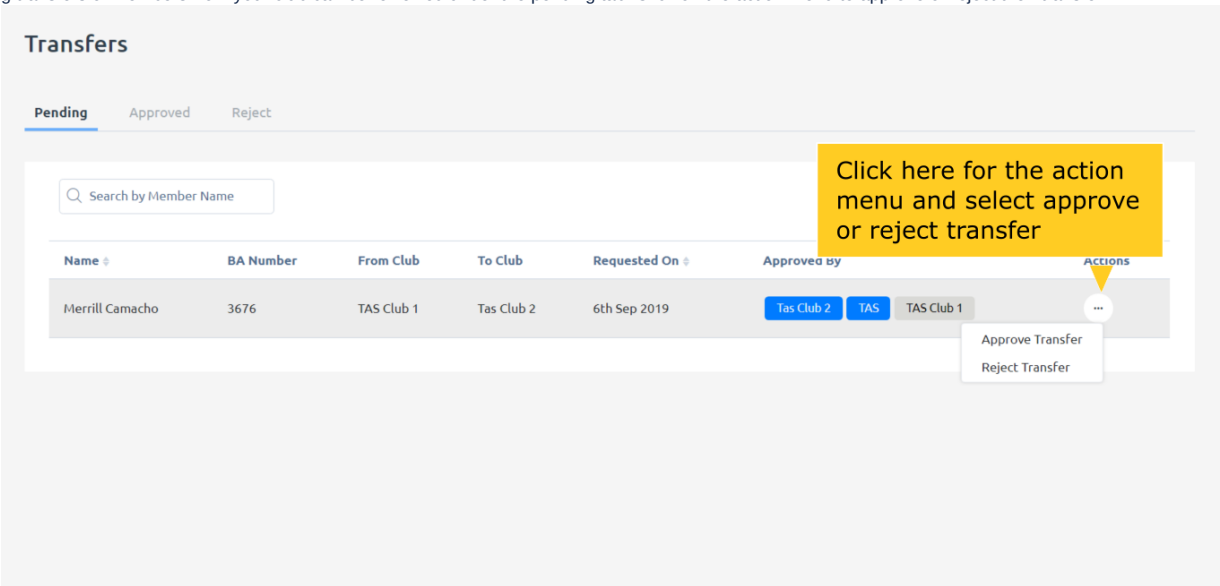
a.

- The list is divided into three sections (tabs) - Pending, Approved and Reject



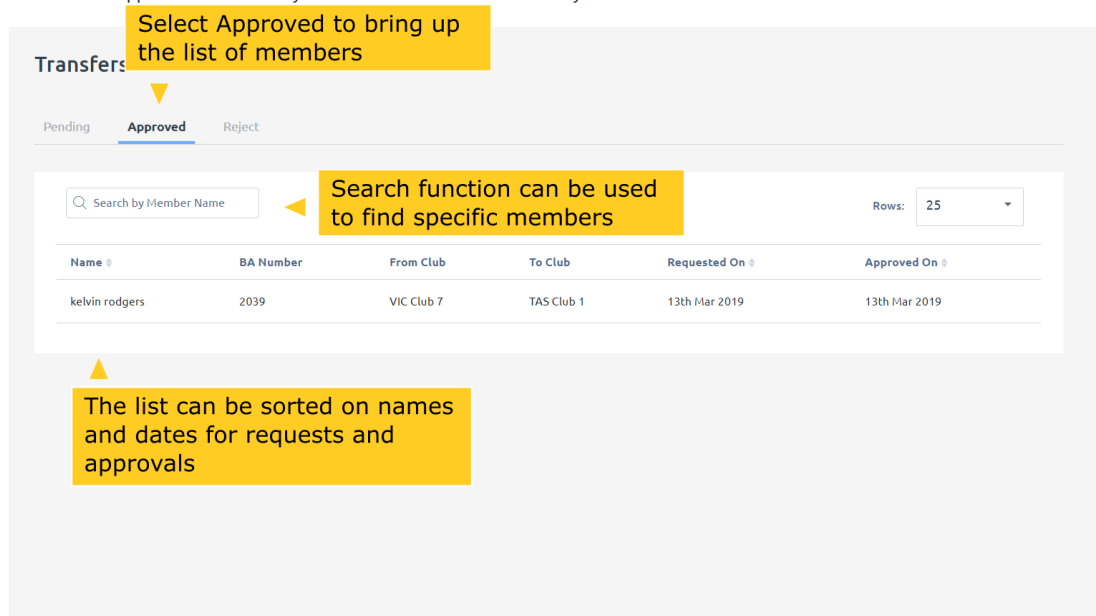
a.

3. Pending transfers of members from your club can be reviewed under the pending tab. Click on the action menu to approve or reject their transfer.



a.

4. Approved members can be reviewed in the approved tab. You can see details such as the approval and request dates, along with the club they have transferred from. This will show both approved transfers to your club as well as transfers from your club. The to club and from club columns will show this detail.



a.

5. Rejected transfers can be reviewed in the reject tab. You can see details such as the reject and request dates, along with the details of the rejection. This will show both rejected transfers to your club as well as transfers from your club. The to club and from club columns will show this detail.

Transfers

Pending Approved **Reject**

Search by Member Name Rows: 25

Name	BA Number	From Club	To Club	Requested On	Rejected On	Rejected By	Reason
Paul Hoddy	2038	TAS Club 1	VIC Club 7	13th Mar 2019	13th Mar 2019	TAS Club 1	

Select Reject to bring up the list of members

Search function can be used to find specific members

The list can be sorted on names and dates for requests and rejections

a.

Exports

This function allows you to export a report of your club and membership in a format that is suitable for opening in a spreadsheet program such as Microsoft Excel.

Currently the membership report includes the following information:

- Name
- Email
- Mobile Phone
- ID
- Birth date
- Gender
- Address
- Membership status

1. Select the exports option in the membership menu. The available reports will appear, with the membership report as the only current report. Other reports may be added over time. Click the action icon to download a copy of the report for your club.

BOWLSLINK TAS Club 1 CHRIS CLARKE

Membership Exports Generate an export of your members.

Report Name	Description	Actions
Membership Report	A report which contains users basic information such as personal details, address and club membership.	Download Report

Click exports to open

Click this icon to open the menu and select download report to download the file to your computer

a.

Clubs

In the clubs section of BowlsLink you will be able to find all information related to your club and any other clubs you have the permission to see.

The clubs section is further divided into clubs, club categories and manage my club.

Clubs

In the **clubs sub-section** you will be able to see all clubs that are currently active in BowsLink. You will be given some club details without clicking into their club profile and you will be able to perform the following actions:

1. You will be able to click onto the clubs' name to retrieve additional information about the chosen club.
2. You will be able to search for a particular club by name.

a.

BOWSLINK TAS Club 1 CHRIS CLARKE ▾

Clubs Showing all Clubs

SEARCH FILTER Rows: 25 1 2 3 4 >

Club Name	Short Name	Parent Group	State
Vic Club 21	Vic21		null
Coolangatta		Cunningham District, AO2019 Imported Clubs	
Jurien Bay		WA League 1	Western Australia
Paradise Point	PP	Cunningham District, AO2019 Imported Clubs	
Vic Club 30	Vic 30		Victoria
Yanched Bowling Club	Yanched		null
Gold Coast	GC	Cunningham District, AO2019 Imported Clubs	
Guilderton Bowling Club (INC)	GBC	WA League 1	Western Australia
Vic Club 29	Vic29		Victoria

3. You will be able to sort the list of clubs differently by clicking on the different column headers.

a.

BOWSLINK TAS Club 1 CHRIS CLARKE ▾

Clubs Showing all Clubs registered in BowsLink

SEARCH FILTER Rows: 25 1 2 3 4 >

Club Name	Short Name	Parent Group	State
Vic Club 21	Vic21		null
Coolangatta	C	Cunningham District, AO2019 Imported Clubs	
Jurien Bay	Jurien Bay	WA League 1	Western Australia
Paradise Point	PP	Cunningham District, AO2019 Imported Clubs	
Vic Club 30	Vic 30		Victoria
Yanched Bowling Club	Yanched		null
Gold Coast	GC	Cunningham District, AO2019 Imported Clubs	
Guilderton Bowling Club (INC)	GBC	WA League 1	Western Australia
Vic Club 29	Vic29		Victoria

4. You will be able to apply specific filters to only find clubs matching your search criteria.

a.

Clubs Showing all Clubs registered in BowsLink

SEARCH FILTER Rows: 25 1 2 3 4 >

Click here to open the filter options

Club Name	Short Name	Parent Group	State
Vic Club 21	Vic21		null
Coolangatta	C	Cunningham District, AO2019 Imported Clubs	
Jurien Bay	Jurien Bay	WA League 1	Western Australia
Paradise Point	PP	Cunningham District, AO2019 Imported Clubs	
Vic Club 30	Vic 30		Victoria
Yanched Bowling Club	Yanched		null
Gold Coast	GC	Cunningham District, AO2019 Imported Clubs	
Guilderton Bowling Club (INC)	GBC	WA League 1	Western Australia

- 5. Filters can be applied by:
 - a. Groups
 - b. States

The screenshot shows a 'Filters' dialog box with two sections: 'GROUPS' and 'STATE'. The 'GROUPS' section has a dropdown menu labeled 'Select a Club Group'. The 'STATE' section has radio buttons for Victoria, New South Wales, Queensland, Northern Territory, Western Australia, South Australia, Tasmania, and Australian Capital Territory. At the bottom are 'APPLY' and 'CANCEL' buttons. A yellow callout box with a black border contains the text: 'Clubs can be filtered by club groups or state. Click apply once the selection has been made'. Two yellow arrows point from the callout box to the 'Select a Club Group' dropdown and the 'APPLY' button.

- c. ...
- 6. You will be able to change the amount of rows displayed in your club table.

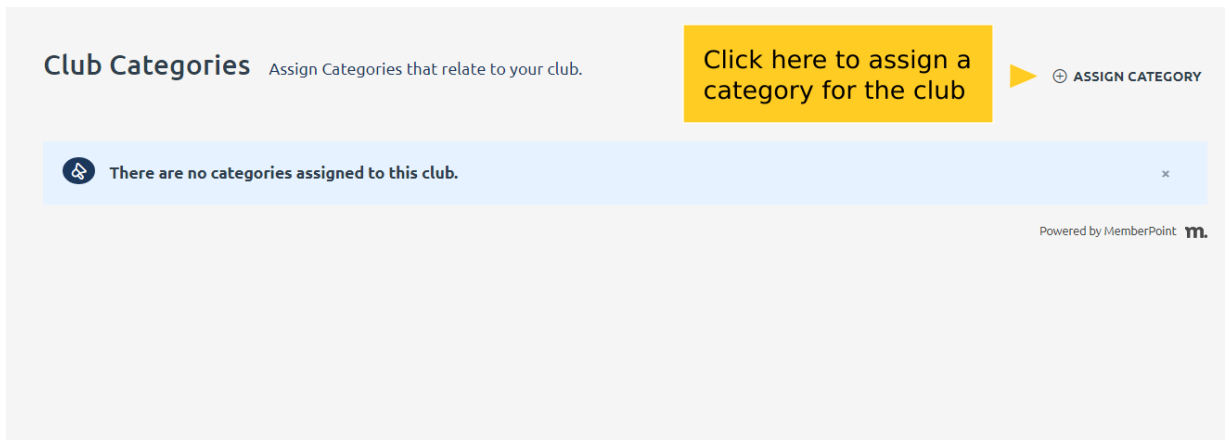
The screenshot shows a table titled 'Clubs' with the subtitle 'Showing all Clubs registered in BowsLink'. The table has columns for Club Name, Short Name, and other details. A yellow callout box with a black border contains the text: 'The number of rows defaults to 25, this can be changed through this menu'. A yellow arrow points from the callout box to a 'Rows:' dropdown menu on the right side of the table. The dropdown menu is open, showing options for 10, 25, 50, and 100 rows. The current selection is 25. Below the table, there is a pagination control showing '1 2 3 4 >'.

a.

Club Categories

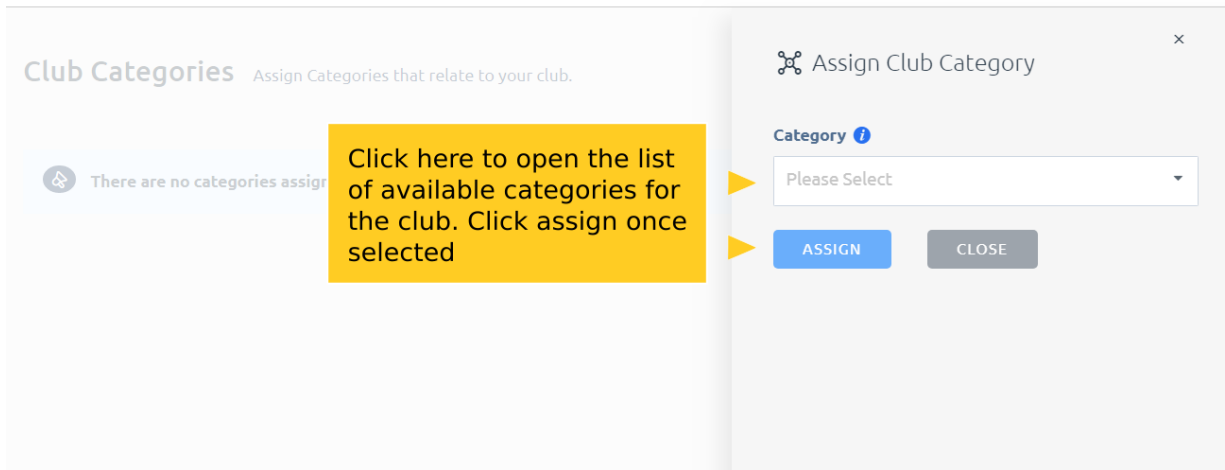
A club can have various categories assigned. Categories are used to show the various services and amenities that the club has, and this information is published in websites and other information systems about the club. The categories are selected from a pre-defined list, and the club administrator selects any and all that may apply to their club. Examples are: Social Bowls, Meals, Entertainment, Function Room Bookings etc.

- 1. To add a category, click on the assign category button in the top right of screen.



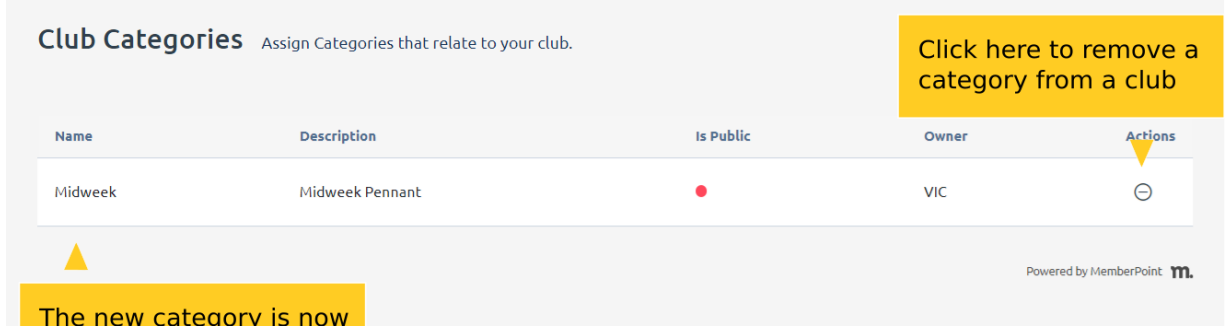
a.

2. Select from the drop down list the appropriate category for your club, and click the assign button.



a.

3. Once a category has been added, it can be removed by clicking the icon at the right end of the category listing.



a.

4. This process can be repeated as many times as you like, to add all the required categories to the club.

Manage My Club

In the **manage my club sub-section** you will be able to see all the details relevant to your club. You will be able to edit all the club information for your club.

The manage your club sub-section is divided into three tabs - Details, Additional Details and Club Member Additional Details.

TAS

Details, additional details and club member additional details tabs

Details Additional Details Club Member Additional Details

Club Details *Update the general information about your club.*

1 Club Overview

Club Name*
 TAS Club 1

Club Short Name*
 TC1

Description
 Non nihil qui hic. Rem voluptates non quo quis et dicta magni. Tenetur excepturi explicabo maiores vitae. Voluptas atque enim et ipsam eius. Eos occaecati accusantium ut dolorem. Temporibus id aut expedita deleniti. Voluptatum aut maiores qui aut est magni. Sed repellendus dolores commodi quibusdam qui ipsa nisi. Vel quidem ullam voluptas et. Ex cumque doloremque esse pariatur qui cumque. Corrupti repellendus laboriosam et qui est.

Click here to open the manage my club options

Details

1. In the details tab of your club you will be able to edit the following field groups:
 - a. Club Overview
 - b. Contact Details

Manage Your Club

Details Additional Details Club Member Additional Details

Club Details *Update the general information about your club.*

1 Club Overview

Club Name*
 TAS Club 1

Club Short Name*
 TC1

Description
 Non nihil qui hic. Rem voluptates non quo quis et dicta magni. Tenetur excepturi explicabo maiores vitae. Voluptas atque enim et ipsam eius. Eos occaecati accusantium ut dolorem. Temporibus id aut expedita deleniti. Voluptatum aut maiores qui aut est magni. Sed repellendus dolores commodi quibusdam qui ipsa nisi. Vel quidem ullam voluptas et. Ex cumque doloremque esse pariatur qui cumque. Corrupti repellendus laboriosam et qui est.

2 Contact Details

Club Phone
 +61-2-2381-1256

After Hours Phone
 03 3194-0893

Club Website
 http://www.lowe.com.au/molestiae-voluptas-sequi-numquam-est

Edit details fields as required

- c.
- d. Club Address
- e. Financial

3 Club Address

Address Line 1
147 Fake Street

Address Line 2

Address Line 3

Suburb
Lake Fred

State Postcode
New South Wales 2909

Country
Serbia

4 Financial

Club ABN
6011521505915222

Membership Year Ending Date
1 July

SAVE CANCEL

f.

Edit details fields as required

Additional Details

1. In the additional details tab you will be able to update any additional details that your club is requesting. If no additional details are required this tab will not display anything.

Manage Y

Click here to access additional details

Details **Additional Details** Club Member Additional Details

Open Hours: Monday*

Open Hours: Tuesday*

SAVE CANCEL

An example of extra details a club may want to provide is opening hours

a.

Club Member Additional Details

In the club member additional details tab you will be able to create new additional fields to gather more data for your club members. You will be able to add the following fields:

- HTML

- Title
- Divider
- Text
- Yes/No
- Long Text
- Date
- Dropdown

1. In this example, we want to know if members are willing to volunteer with school group coaching at the club. This would be a yes or no question, so that is the option we will use

The screenshot shows the 'Manage Your Club' interface. At the top, there are three tabs: 'Details', 'Additional Details', and 'Club Member Additional Details'. A yellow callout box points to the 'Club Member Additional Details' tab with the text 'Click here to access club member additional details'. Below the tabs, there is a section titled 'Additional Member Details' with a subtitle 'Additional information you want to capture about your members.' and a 'SAVE' button. The main area contains a message: 'YOU CURRENTLY HAVE NO FIELDS. DRAG AN ELEMENT FROM THE RIGHT TO BEGIN'. On the right side, there is a panel titled 'AVAILABLE ELEMENTS' with a list of options: HTML, Title, Divider, Text, Yes/No, Long Text, Date, File, and Dropdown. A yellow callout box points to the 'Yes/No' option with the text 'Our example is a Yes/No question, so select this option'.

a.

2. When Yes/No is clicked, a detailed dialog box will appear, which you can fill out with the appropriate details. In our example, we want to get a response from all members, and we want them to answer the question. Once we are happy with how the question is set up, we click save to finalise the question. It will now appear in the member's profile for them to respond to. We can then report on this in future.

Manage Your Club

Details Additional Details **Club Member Additional Details**

Click save once done

Additional Member Details *Additional information you want to capture about your members.* SAVE

Are you able to assist with coaching of school groups at the club?

No

Field Label Text ?

Are you able to assist with coaching of school groups at the club?

Default Value

No

Settings

Field Required

Yes

Visible to members

Yes

Members can edit

Yes

Field Name: 1567562399509

AVAILABLE ELEMENTS

- HTML
- Title
- Divider
- Text
- Yes/No
- Long Text
- Date
- File
- Dropdown

The label in this case is the question we want the member to answer

In this case we want the default to be no, until the member responds

The question should be visible to all members, and we need members to edit, so they can say Yes or No

a.

Greens

The Greens section is used to manage the greens and rinks available at your club. If there are missing greens for your club, these need to be added by a system administrator. Please contact a BowlsLink system admin to assist with fixing this.

The greens management section is linked to other components in the system. Greens available for member use and the greens used in competitions are taken from the information provided in this module.

1. The main screen shows the current greens assigned to your club. With multiple greens, you can use the standard search and filter functions to look for a particular green within your club.

Membership

Clubs

Greens

Finances

Select the greens option from the main options

Greens

Active Inactive

FILTER Search by club name Rows: 25

Club	Green	Rinks	Actions
TAS Club 1	Green 1	7	...

The current greens for your club are listed

Powered by MemberPoint **m.**

a.

2. To edit the options for a green in your club, click on the action button and select edit green from the menu.

Greens

Active Inactive

FILTER Search by club name

Click on the actions button and select edit green

Club	Green	Rinks	Actions
TAS Club 1	Green 1	7	...

Edit Green

a.

- b. The details for your green will be brought up. The managing club will default to your club, this cannot be changed in this screen, and requires a system administrator to change the management. The green short name is used to identify your green when you have more than one. The short name can be a number (for example: Green 1, Green 2, Green 3) or a letter (Green A, Green B, Green C). Optionally you can add a full name to better identify your greens. The timezone will default to your current club zone, but this can be adjusted if required.

Edit Green

1 Assign Club

Managed By

TAS Club 1

Your club will default as the managing club

2 Green Name

Green Short Name

1

The short name is either a single number or letter

Green Full Name (optional)

green 1

You can give the green a full name or title if you wish

3 Time Zone

Australia/Hobart GMT+10:00 (AEST)

The timezone will default to the same as your club

c.

- d. The address for the green will default to the same address as your club. If you need to alter this, you can uncheck this box and enter the full address details for the green location. The green features can be edited to reflect the particular details of the green, which may differ across the greens.

4 Address

Venue Information

Same as club address

The address for your green will default to the club address. You can change this by unchecking this box

6 Green Features

Indoor/Outdoor

Outdoor

Indoor

Surface

Grass

Carpet

Synthetic

Lights

Yes

The details of your green can be managed here. Any of the options can be altered as needed

e.

- f. The general availability times for the green can be configured in the next section. Complete days can be removed by unchecking the tick next to the day. For days of availability, the hours can be adjusted by changing the time in the boxes.

7 Default Green Availability

<input checked="" type="checkbox"/>	Monday	From	09:00 am	To	05:00 pm
<input checked="" type="checkbox"/>	Tuesday	From	09:00 am	To	05:00 pm
<input type="checkbox"/>	Wednesday	From	09:00 am	To	05:00 pm
<input checked="" type="checkbox"/>	Thursday	From	09:00 am	To	05:00 pm
<input checked="" type="checkbox"/>	Friday	From	09:00 am	To	05:00 pm
<input checked="" type="checkbox"/>	Saturday	From	09:00 am	To	05:00 pm
<input type="checkbox"/>	Sunday	From	09:00 am	To	05:00 pm

g.

h. Final screen is used to setup the individual rinks for the green. A green must have at least one rink included. The ditch rinks can be setup by ticking the boxes next to the rink. Click save and close to close the screen and save the information.

8 Set Rinks

Rink 1	<input checked="" type="checkbox"/> Ditch Rink
Rink 2	<input type="checkbox"/> Ditch Rink
Rink 3	<input type="checkbox"/> Ditch Rink
Rink 4	<input type="checkbox"/> Ditch Rink
Rink 5	<input type="checkbox"/> Ditch Rink
Rink 6	<input type="checkbox"/> Ditch Rink
Rink 7	<input checked="" type="checkbox"/> Ditch Rink

SAVE & CLOSE CANCEL

i.

Competitions

Please see the separate competitions user guide. This can be found here:

[User Manual - Competitions](#)

Email Campaigns

The email campaigns section is used to communicate with your club members. It makes it easier to communicate with particular members and to send regular email messages and updates.

BowlsLink uses a third party product called Campaign Monitor to send emails from the system. Campaign Monitor is embedded into BowlsLink so it acts as part of the system.

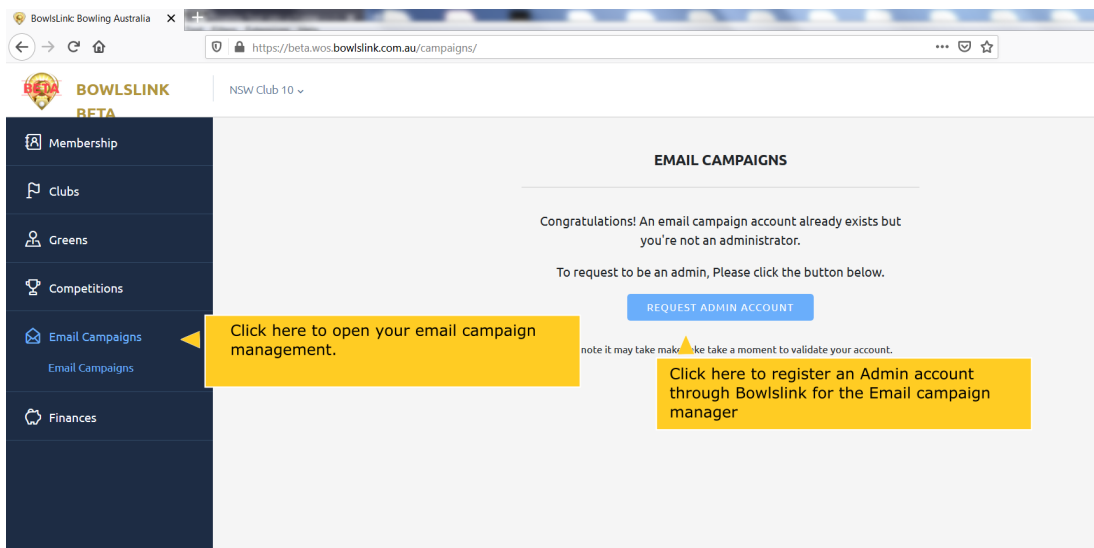
Note - When setting your From Address, please set it to noreply@bowlslink.com.au. You can set your Reply To Address and From Name to your club name and email address.

If you don't follow this delivery rates can be effected.

First Login to Emails

The first time you log into use the Emails from BowlsLink, you will need to setup an Administrator account with Campaign Monitor for your club. This is done automatically from with Bowlslink.

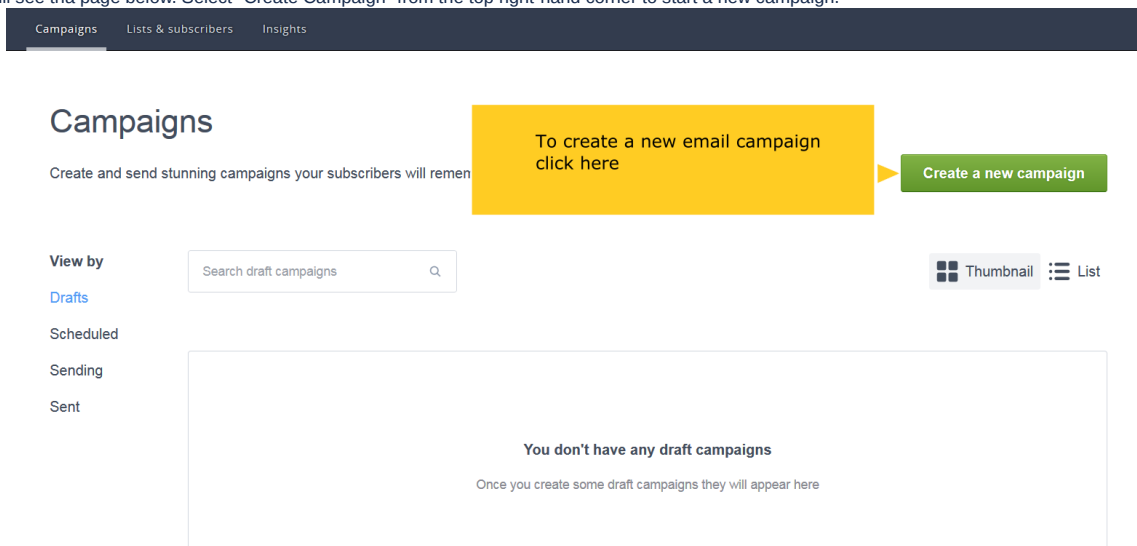
1. Click on the Email Campaigns menu in the Left hand Menu. This will ask you to request being an Admin for the Club email account. Click the Request Admin Account button.



Creating an email campaign

When you create a new email campaign you will need to go through a few steps to get the email ready to be sent out.

1. You will see the page below. Select "Create Campaign" from the top right-hand corner to start a new campaign.



a.

2. You will be taken to a screen to create the campaign (different to the Email, which we will create later). You will need to complete all of the fields, which are:

- a. Campaign Name - This won't appear on the email, but is a reference for you. Use a name that describes the type or content of the email.
- b. Subject - This is the subject line of the email, which the recipients will see.
- c. Who is it From - This should be set to Noreply@bowlslink.com.au. If it is not set to this it may effect delivery rates.

Campaigns Lists & subscribers Insights

Define the campaign and sender details
Choose from two campaign types

Regular A/B test

Campaign Content Recipients Deliver

Type your campaign name here this is a general name for the campaign.

Name this campaign
The campaign name is shown in your reports and your email archive.

Type the subject line here. This is what will appear in people's inboxes as the subject.

Write a subject line

Preheader text
The preview that's displayed as an email preview in [some inboxes](#). (Optional)

Who is it from?
This will display in the From field. You can use a [different reply-to address](#) and [personalized From details](#).

Kelvin Admin

noreply@bowlslink.com.au

Next

d.

3. You will be taken to a select

Campaigns

CREATE CAMPAIGN

Drafts Scheduled Sending Sent

Campaign Search

Rows: 25

Campaign	Subject	Date Created	Recipients	Content
Pennant teams week 1	Team for the first game	9th Sep 2019	●	●
Greens Changes November	Changes to Greens for play in November.	10th Sep 2019	●	●
	Are you interested in a new winter competition?		●	●

The campaign we have just created now appears in the list

The recipients is showing as red, as none have been added yet

The content is showing as red, as nothing has been added

a.

4. Click on the action menu for the email. The options in the action menu are:

- Edit Details - Change the details of the email. This will take you back to step 2 above, allowing you to change the name, subject, sender name etc.
 - Content editor - This is where you edit the content of the email, including the message in the email, adding logos and branding.
 - Recipients - This is where we can add the names of the members we want to send the email to.
 - View Preview - Allows us to see a preview of what the email will look like when it is sent.
 - Clone - Allows us to copy an existing email. Useful if there are emails you are sending frequently to members.
 - Delete - Removes this campaign email, if we no longer need to send it.
- g.

Subject	Date Created	Recipients	Content
Team for the first game	9th Sep 2019	●	●
Changes to Greens for play in November.	10th Sep 2019	●	●
Are you interested in a new winter competition?	6th Sep 2019	●	●

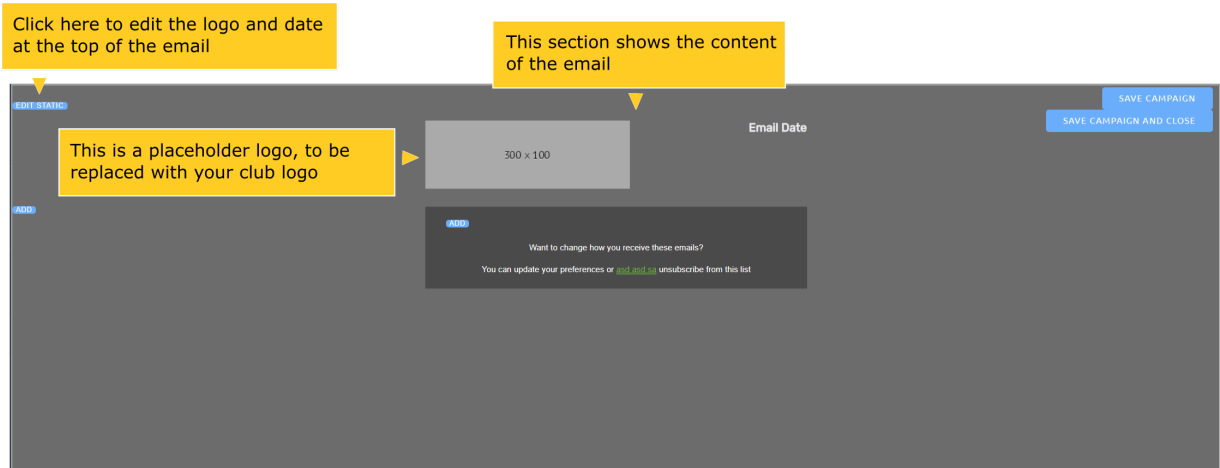
Click here to bring up the action menu for the email

- Edit Details
- Content Editor
- Recipients
- View Preview
- Clone
- Delete

Clone can be used to copy an existing email campaign

5. Click on the Content Editor option, this will open up the page to edit and add content to the email.

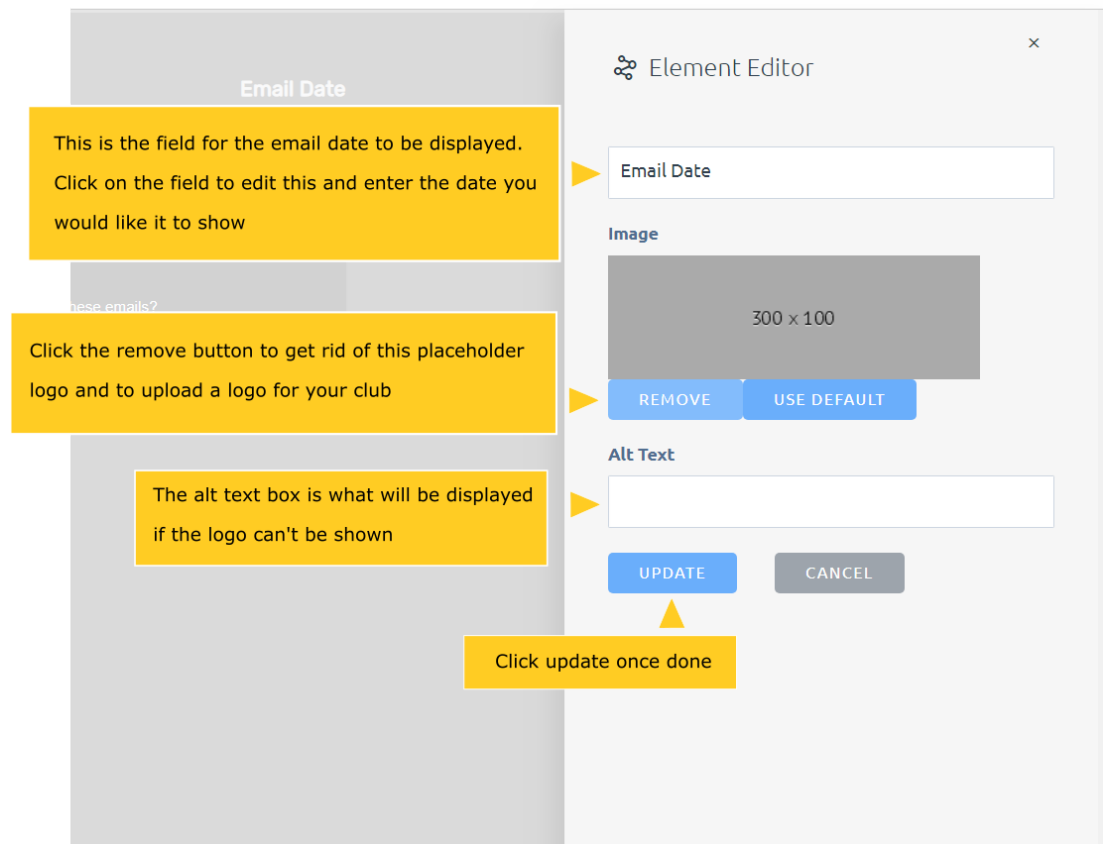
- The first screen is the default layout for the master template. In the center of the screen is the content that is already added to the email.
- The existing content is a placeholder for a logo, a date field and a section for the bottom of the email that allows members to change their mail options.
- The first thing to update is the logo, click on the edit static button as shown below.



d.

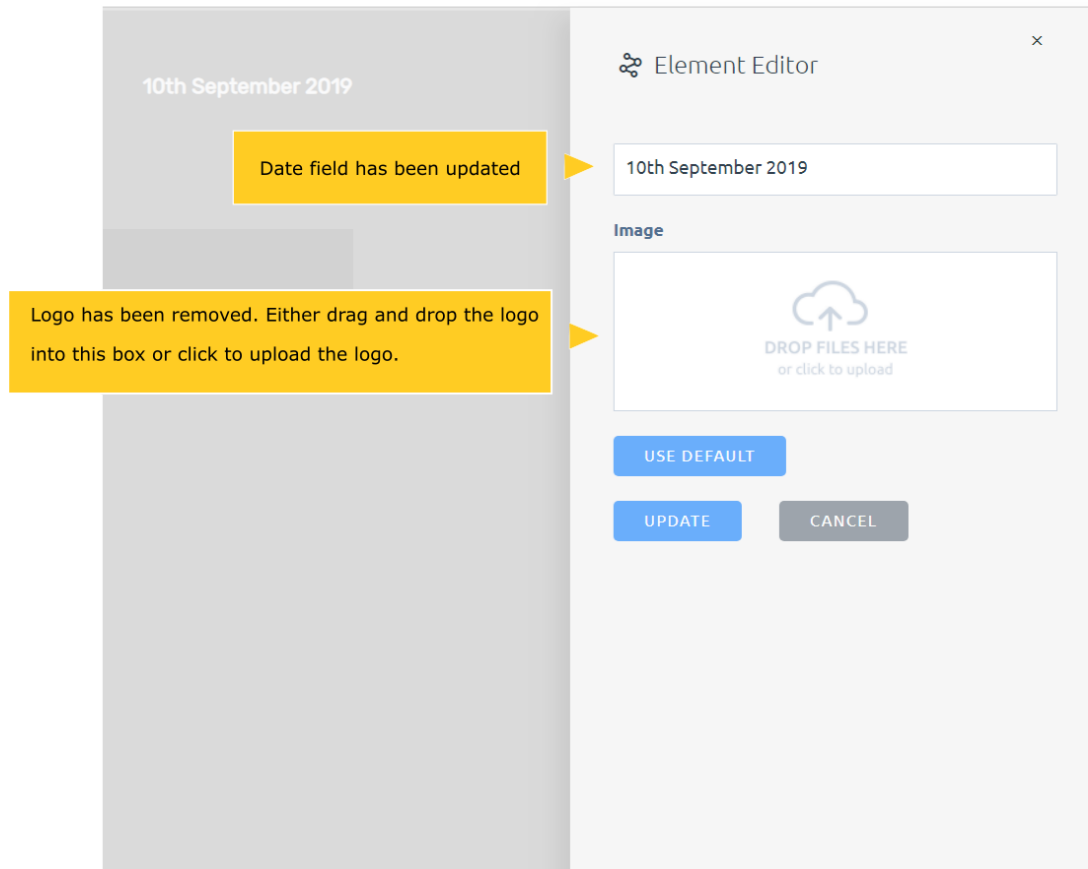
This will bring up the element editor screen. This allows you to add a date for the email message, simply by typing this into the field.

f. The image can be replaced by clicking on the remove button, which will then allow you to upload your own logo for your club. If the logo can't be displayed (for example if an email account will only display text and not images) then the text in the alt text box will be displayed instead. Typically it would be best to enter the name of your club, so this is displayed if the logo isn't.

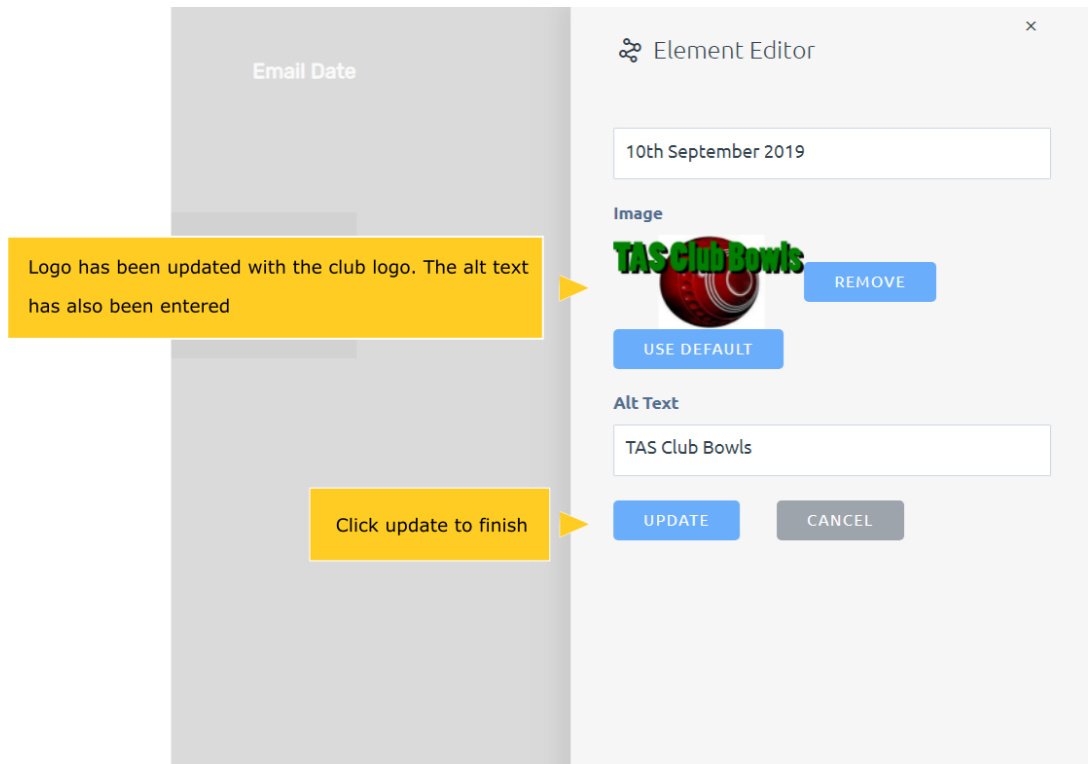


g.

Once the date has been updated, and the logo removed, it will prompt you to upload a new logo. This should be a copy of your club logo, and it should be sized **approximately 300 x 100 pixels in size**. It does not need to be exactly these dimensions, but keeping it close to these is ideal.



- i.
- j. Once your logo has been added, it will display in the box. You can also add the alt text to display when the logo can't be shown. Click update to complete the edit of the element and return to the main screen.



- k.
- l. On the main screen the logo and date information will now display correctly. The next component to add is the main text for the email, which is the most important part. Go to the Add menu on the left side of screen and select it, and then pick content block from the menu that comes up.

m.

n. The content block is now added to the screen, and it will be populated with fake text. Click edit on the left of screen to edit the main block of text.

o.

p. The element editor will appear, and you can now write the main text for your email. Basic tools allow you to use bold text, italics, bullets, numbered lists and to add in hyperlinks. Once you have written the main text for your email, click update to save the text.

10th September 2019

greens, green 1 will be
cheduled games for
en 2.




Enter text for the email and
click update to save the text

vs

tions relating to the
Bob for action.

mails?
scribe from this list

Element Editor

B *I*   

Please note that due to maintenance on the greens, green 1 will be out of action for the month of November. All scheduled games for the month will be moved to green 2.

This will primarily impact

- Pennant

UPDATE **CANCEL**

q.
r. If you are happy with the content of the email, you can click on the save campaign and close the draft email.

TAS Club Bowls

10th September 2019

Once you are happy with the content of the email, click save campaign and close

SAVE CAMPAIGN
SAVE CAMPAIGN AND CLOSE

Please note that due to maintenance on the greens, green 1 will be out of action for the month of November. All scheduled games for the month will be moved to green 2.

This will primarily impact

- Pennant
- Social and barefoot bowls

Bob will be the point of contact for any questions relating to the move. Replies to this email will be sent to Bob for action.

Happy bowling!

ADD

Want to change how you receive these emails?
You can update your preferences or [add, add, sa](#) unsubscribe from this list

S.

t. This will take you back to the drafts screen. The next step is to add in the recipients for the email. Click on the action menu to bring up the menu for the email, and select recipients from the menu.

Campaigns

CREATE CAMPAIGN

Drafts Scheduled Sending Sent

Campaign Search Rows: 25

Campaign	Subject	Date Created
Pennant teams week 1	Team for the first game	10th Sep 2019
Greens Changes November	Changes to Greens for play in November.	10th Sep 2019
New Winter Competition	Are you interested in a new winter competition?	6th Sep 2019

Click on the action menu and select recipients

- Edit Details
- Content Editor
- Recipients
- View Preview
- Send Preview
- Clone
- Delete

U.

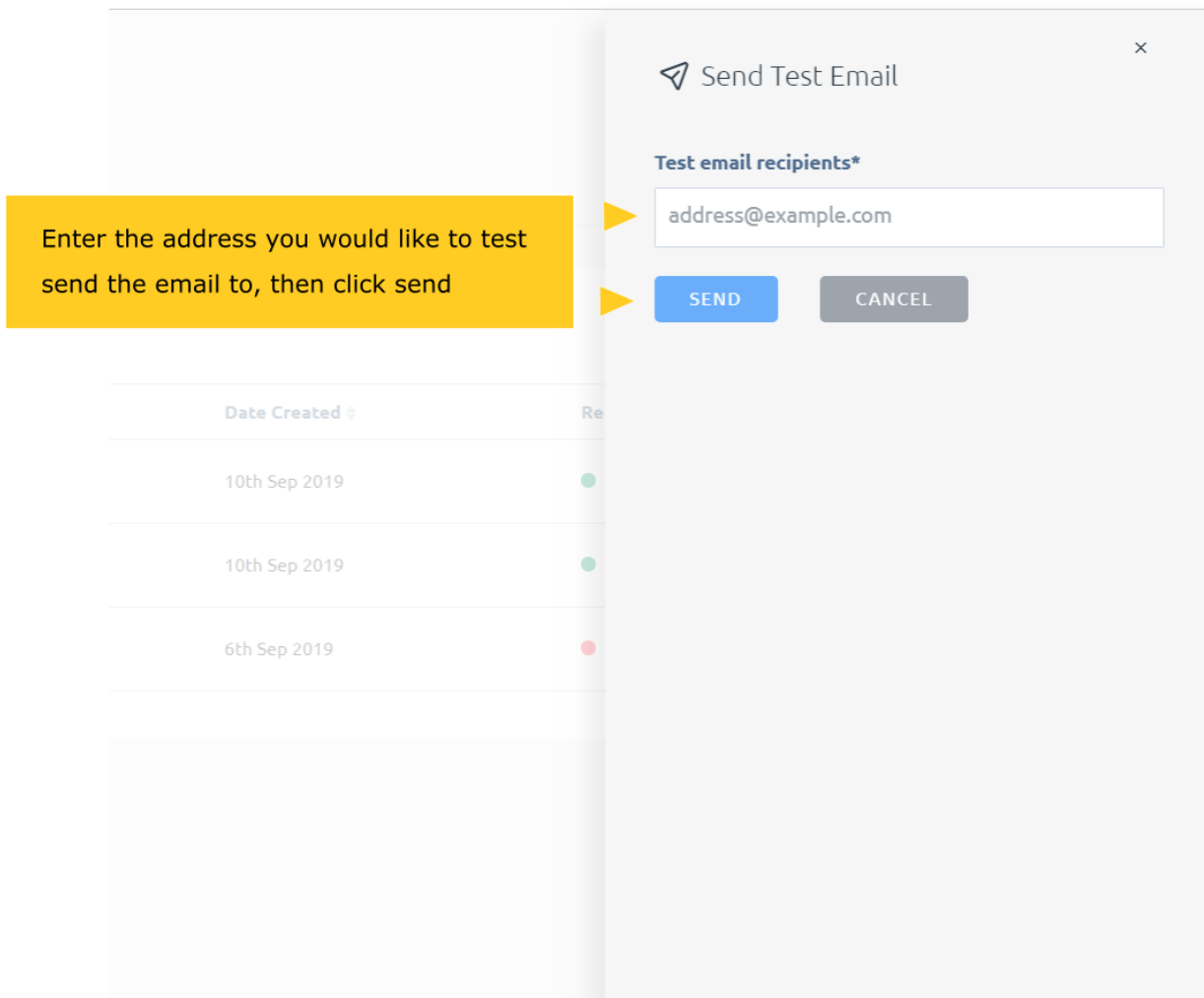
v. The edit campaign screen allows you to select the recipients for the email. The member groups listed are managed through the **membership** section, under the **groups and certificates** section. This is where you can assign your members to a group, which is a good way to manage your communication with members. If you need to add extra recipients who may not be in a group, you can individually add them in the other email address box. It may be the case that you are communicating with a group of members for the first time, and you will need to create a new membership group to cover them. This will make further communication easier, as the group will be available in future.

W.

- x. Now that the recipients and content of the email are done, you can preview the email before it is sent. There are two options for this, view preview and send preview. View preview will show you the content of the email, along with the subject line, sender name and logo. The send preview allows you to send a copy of the email, so you can check how it appears once it is delivered. Selecting this will bring up another dialog box.

Y.

- z. To test send the email, you need to enter an email address and click send. This will email a copy of the message to the address, and you can check the appearance and formatting before sending out to other members. There may be occasions where approval could be required for the content or wording of a message. This allows you to send a message to a single member to be approved before distribution.



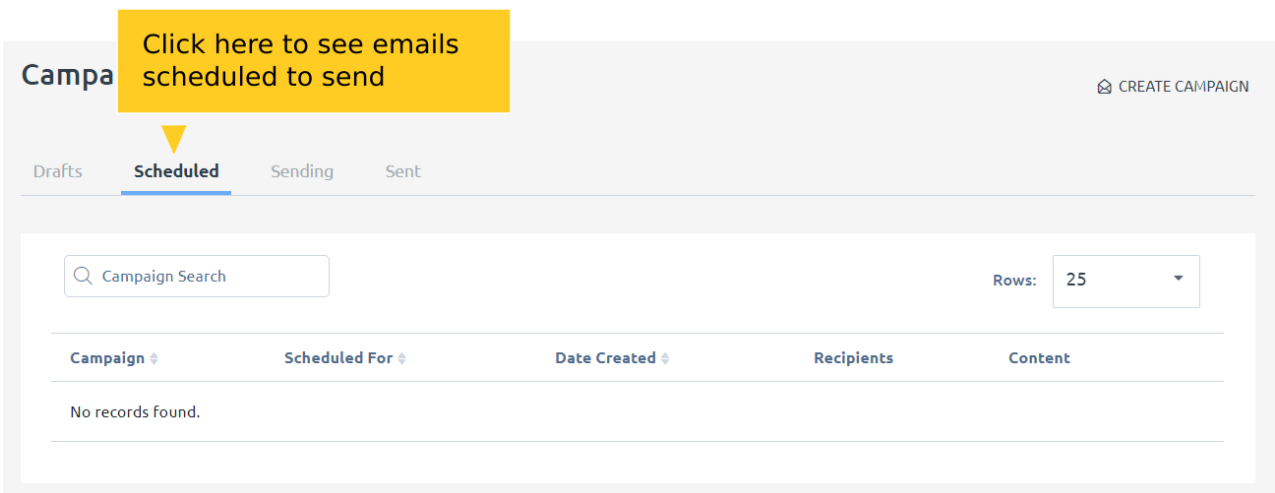
aa.

ab. Once you are happy with the testing and content of the email, you can schedule it to be sent.

Scheduled

Once an email has been scheduled to send, it will appear in this tab.

1. Select the scheduled tab to see any emails currently scheduled to be sent. Emails can be deleted or edited through the action button prior to the time they are due to be sent.



2.

Sending

Email campaigns that are actively being sent will appear in the sending tab. This is due to the potential size of some distribution lists for emails. Where there is a large number of recipients, the email will be sent to blocks of recipients at a time, to manage the load of outgoing emails. Any messages that are actively sending at this time will appear in the tab.

Sent

This tab is where you can see any past email campaigns. Sent emails can be reviewed and their effectiveness considered. Email addresses that have failed to deliver to can be reviewed and followed up.

1. Click on the sent tab to see details of email campaigns sent out. Statistics are shown for the number of emails sent, how many were opened and the number that failed to be delivered.

Click here to see emails sent

CREATE CAMPAIGN

Sent

FILTER Search Campaigns Rows: 10 < 1 2 ... 5 6 >

Campaign*	Date Sent	Recipients	Open Rate	Bounce Rate
Campaign Name	01 Sep, 2018	265	87% (234)	5% (14)

Statistics on the delivery of emails is shown

- 2.

Finance

In the finance section of BowlsLink you will be able to find all information related to finances of your club.

The finance section is further divided into Invoices and Fees.

BOWLSLINK TAS Club 1 CHRIS CLARKE

Membership Clubs Greens Competitions Email Campaigns Finances Invoices Fees

Invoices TAS Club 1 CREATE CUSTOM INVOICE

Approved Draft Voided

FILTER Invoice Search Rows: 25 1 2 >

Invoice	Issued	Due	Sent	Created	Member	Status	Total	Amount Paid
3	28th Aug 2019	31st Aug 2019	●	28th Aug 2019	Shanon Kertzmann	OUTSTANDING	\$1,470.00	\$0.00
4	28th Aug 2019	31st Aug 2019	●	28th Aug 2019	Cordie Keeling	OUTSTANDING	\$1,470.00	\$0.00
5	28th Aug 2019	31st Aug 2019	●	28th Aug 2019	Stephan Block	OUTSTANDING	\$1,470.00	\$0.00
6	28th Aug 2019	31st Aug 2019	●	28th Aug 2019	Taylor O'Connell	OUTSTANDING	\$1,470.00	\$185.00
7	28th Aug 2019	31st Aug 2019	●	28th Aug 2019	Kelsi Schultz	OUTSTANDING	\$1,470.00	\$0.00

Click here to access club finances - invoices and fees

Invoices

When you are in the **invoices** section you will be provided with a list of all the invoices related to your club.

You will also be given the functionality to create custom invoices.

1. The list is divided into three sections (tabs) - approved, draft and voided.
2. For each invoice listed here you will be able to retrieve further information by clicking on the desired invoice.

BOWLSLINK TAS Club 1 CHRIS CLARKE

Invoices TAS Club 1 CREATE CUSTOM INVOICE

Approved Draft Voiced

Approved, draft and voided

Invoice	Issued	Due	Sent	Created	Member	Status	Total	Amount Paid
2	28th Aug 2019	31st Aug 2019	●	28th Aug 2019	Shanon Kertzmann	OUTSTANDING	\$1,470.00	\$0.00
3	28th Aug 2019	31st Aug 2019	●	28th Aug 2019	Cordie Keeling	OUTSTANDING	\$1,470.00	\$0.00
4	28th Aug 2019	31st Aug 2019	●	28th Aug 2019	Stephan Block	OUTSTANDING	\$1,470.00	\$0.00
5	28th Aug 2019	31st Aug 2019	●	28th Aug 2019	Taylor O'Connell	OUTSTANDING	\$1,470.00	\$185.00
6	28th Aug 2019	31st Aug 2019	●	28th Aug 2019	Kelsi Schultz	OUTSTANDING	\$1,470.00	\$0.00

a.

Creating a custom invoice

When creating a custom invoice for a particular member of your club you will need to follow the steps below.

1. Click "Create Custom Invoice" in the top right-hand corner.

BOWLSLINK TAS Club 1 CHRIS CLARKE

Invoices TAS Club 1 CREATE CUSTOM INVOICE

Approved Draft Voiced

Click here to create custom invoice

FILTER Invoice Search

Invoice	Issued	Due	Sent	Created	Member	Status	Total	Amount Paid
2	28th Aug 2019	31st Aug 2019	●	28th Aug 2019	Shanon Kertzmann	OUTSTANDING	\$1,470.00	\$0.00
3	28th Aug 2019	31st Aug 2019	●	28th Aug 2019	Cordie Keeling	OUTSTANDING	\$1,470.00	\$0.00
4	28th Aug 2019	31st Aug 2019	●	28th Aug 2019	Stephan Block	OUTSTANDING	\$1,470.00	\$0.00
5	28th Aug 2019	31st Aug 2019	●	28th Aug 2019	Taylor O'Connell	OUTSTANDING	\$1,470.00	\$185.00
6	28th Aug 2019	31st Aug 2019	●	28th Aug 2019	Kelsi Schultz	OUTSTANDING	\$1,470.00	\$0.00

a.

2. Select the member of your club you would like to raise the invoice for.

Click here to bring up list of club members

Member*

Taylor O'Connell

APPLY CANCEL

Once the correct member is selected click apply

Created	Member
28th Aug 2019	Shanon Kertzmann
28th Aug 2019	Cordie Keeling
28th Aug 2019	Stephan Block
28th Aug 2019	Taylor O'Connell
28th Aug 2019	Kelsi Schultz
28th Aug 2019	Broderick Bode

a.

After you have selected your member you will be able to customise your invoice. You will be able to perform the following actions:

1. Add line item to the invoice, this will be blank when first added.
2. Select dates - You can specify when the invoice was issued and when the invoice is due for payment

< Back

Invoice #b93bb97e-1bcb-4a4b-bbf1-1b8fd8298eae

DRAFT

DELETE DOWNLOAD APPROVE

Member: Taylor O'Connell

The date of issue and the due date for the invoice can be altered here

Date Issued: Wed, Sep 4th 2019

Due Date: Fri, Oct 4th 2019

#	Item	Type	GST	Total
1			<input checked="" type="checkbox"/> GST Item	\$0

ADD LINE ITEM

Click here to add a line item to the invoice

Subtotal: \$0.00
GST 10%: \$0.00
TOTAL: \$0.00

PAID: \$0.00
REMAINING OWED: \$0.00

a.

3. You will be able to provide detail what you are invoicing the member for.

- a. Item
- b. Type
- c. GST
- d. Total

4. Approve - Once you have included all required details in your invoice you can approve your invoice for action.

< Back

Invoice #b93bb97e-1bcb-4a4b-bbf1-1b8fd8298eae DRAFT DELETE DOWNLOAD APPROVE

Member: Taylor O'Connell

Date:
 Week:
 Due:
 Fri:

Enter the cost of the item and tick if this includes GST. Click approve to finalise the invoice

Select the type of item by clicking here and selecting from the list

#	Item	Type	GST	Total
1	New club polo shirt	Club Shirt	<input checked="" type="checkbox"/> GST Item	\$55
		Membership 1552391250		
		Club Shirt		

Enter the name of the item in this field

Subtotal: \$50.00
 GST 10%: \$5.00
TOTAL: \$55.00

PAID: \$0.00
 REMAINING OWED: \$55.00

a.

5. Delete - If your invoice is no longer required you can delete the current version of your invoice.

6. Download - If you need to save your invoice externally or print it you will be able to download the invoice for further actions.

< Back

Invoice #b93bb97e-1bcb-4a4b-bbf1-1b8fd8298eae DRAFT DELETE DOWNLOAD APPROVE

Member: Taylor O'Connell

Due Date:

Click delete to remove this invoice, download if you wish to print or save a copy

#	Item	Type	GST	Total
1	New club polo shirt	Club Shirt	<input checked="" type="checkbox"/> GST Item	\$55
		Membership 1552391250		
		Club Shirt		

Subtotal: \$50.00
 GST 10%: \$5.00
TOTAL: \$55.00

PAID: \$0.00
 REMAINING OWED: \$55.00

a.

Approved

In the **approved** tab of the listed invoices you will find all invoices that are currently approved. These invoices are ready and you can perform the following actions:

1. Enter payment - If you have received payment (full or partial) for your invoice you will be able to record it here.
2. Send - If your approved invoice still needs sending you will be able to do this through this function.
3. Download - Should you require to download your invoice you will be able to do this here.
4. Void - Should this invoice no longer be required it can get voided here.

5. View Payments - If you need to check in more detail when payments were made you can do this here.

Invoices TAS Club 1 CREATE CUSTOM INVOICE

Approved | Draft | Voided

FILTER Invoice Search

Invoice	Issued	Due	Sent	Created	Member	Status	Total
2	28th Aug 2019	31st Aug 2019	●	28th Aug 2019	Shanon Kertzmann	OUTSTANDING	\$1,470.00
3	28th Aug 2019	31st Aug 2019	●	28th Aug 2019	Cordie Keeling	OUTSTANDING	\$1,470.00
4	28th Aug 2019	31st Aug 2019	●	28th Aug 2019	Stephan Block	OUTSTANDING	\$1,470.00
5	28th Aug 2019	31st Aug 2019	●	28th Aug 2019	Taylor O'Connell	PAID	\$0.00
6	28th Aug 2019	31st Aug 2019	●	28th Aug 2019	Kelsi Schultz	OUTSTANDING	\$1,470.00
7	28th Aug 2019	31st Aug 2019	●	28th Aug 2019	Broderick Bode	OUTSTANDING	\$1,470.00
8	28th Aug 2019	31st Aug 2019	●	28th Aug 2019	Nayeli Bogan	APPROVED	\$0.00

Actions which can be taken on an unpaid invoice

- Enter payment
- Send
- Download
- Void
- View Payments

a.

b. If you choose to enter a payment, you will need to select the method of payment and how much is being paid. If a credit card is used, the details will need to be provided as well.

Click here to bring up the payment method for the invoice

Enter the amount paid here

Click pay to finalise the payment

Payment Method: Credit Card (Live SB)

Amount: \$1,470.00

Card Number*:

Expiration*: MM/YY CVV*: CVV

Payment Overview

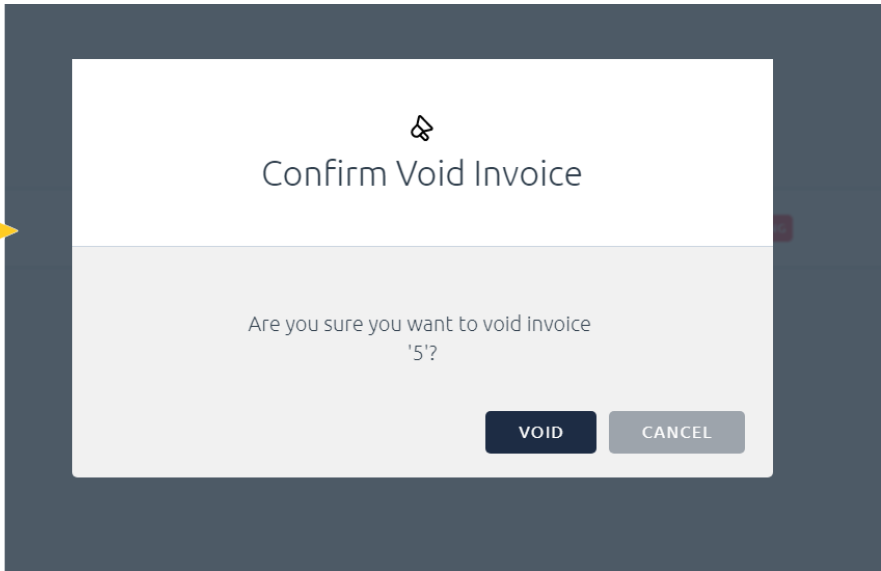
Invoice Total	\$1,470.00
Paying	\$1,470.00
Sub-Total	\$1,470.00
Surcharges	\$0.00
Total Payment	\$1,470.00

PAY CANCEL

c.

d. If you choose to void the invoice, a confirmation will appear.

A confirmation screen will appear, to check you want to void the invoice



e.

f. If you choose to view payments, you will be able to see a history of payments and are able to void these if required.

Created	Member	Status
28th Aug 2019	Shanon Kertzmnn	OUTSTAN
28th Aug 2019	Cordie Keeling	OUTSTAN
28th Aug 2019	Stephan Block	OUTSTAN
28th Aug 2019	Taylor O'Connell	PAID
28th Aug 2019	Kalei Schultz	OUTSTAN

g.

Draft

In the **draft tab** of the listed invoices you will find all invoices that are currently in draft status. These invoices are not approved yet and you can perform the following actions:

1. Edit - Change the details of the invoice before approving
2. Delete - Delete the invoice from the system
3. Approve - Approve the invoice and make live for payment
4. Download - Should you require to download your invoice you will be able to do this here.

Invoices CREATE CUSTOM INVOICE

Approved **Draft** Voided

Click here to select the draft invoice tab

Click here to bring up the action list for the draft invoice

FILTER Invoice Search

Invoice	Created	Member	Status	Total
<input type="checkbox"/> b93bb97e-1cb4-4a4b-bbf1-1b8fd...	4th Sep 2019	Taylor O'Connell	DRAFT	\$55.00

Edit
Delete
Approve
Download

a.

Voided

In the **voided tab** of the listed invoices you will find all invoices that have been voided.

Invoices TAS Club 1 CREATE CUSTOM INVOICE

Approved Draft **Voided**

The filter and search options can be used to find invoices

Rows: 25

The rows can be used to sort the invoices as required

Invoice	Issued	Due	Sent	Created	Member	Status	Total	Amount Paid
<input type="checkbox"/> 10	28th Aug 2019	31st Aug 2019	●	28th Aug 2019	Jerald Braun	VOID	\$1,470.00	\$0.00
<input type="checkbox"/> 15	28th Aug 2019	31st Aug 2019	●	28th Aug 2019	Colby Lindgren	VOID	\$1,470.00	\$0.00

Fees

When you are in the **fees** section you will be provided with a list of all the different fee items related to your club. As an overview, you create fee items, which are the individual things you will be charging members for. These are then added to a fee package, which allows you to group together items. Finally the fee package is assigned to the relevant members of your club.

The list is divided into these three sections (tabs) - fee items, fee packages and fee labels.

Fee Items

1. Adding a fee item
 - a. When adding a new fee item you will need to follow the below steps:
 - b. Click on the "Add Fee" button at the top right-hand corner.

Membership
Clubs
Greens
Competitions
Email Campaigns
Finances
Invoices
Fees

Fees

[Click here to add fee](#) [ADD FEE](#) [ADD FEE PACKAGE](#)

Fee Items | Fee Packages | Fee Labels

List of club fees *View, create and manage your club fees. Group these into Fee Packages to assign to your members.*

Title	Description	Type	Price (inc GST)	GST	
Monthly Membership 1552391250	Monthly Membership Demo Fee	MEMBERSHIP 1552391250	\$185.00	\$16.82	...
Club Shirt	Club Shirt	CLUB SHIRT	\$60.00	\$5.45	...

C.

2. You will now add the details for the fee. The details are:

- Name - Give the fee you are creating a name that is relevant and that will be understood by your members.
- Description - Give more specific details what this fee is for to help your members understand what this fee relates to and covers.
- Price and GST - Specify the price of the fee and whether it should include GST.
- Fee Type - You can select a fee type that already exists.

Enter fee name

Enter description for the fee

Enter fee amount. Check box if GST included

Add Fee
×

Name*

Description*

Price*

includes GST

Fee Type*

Membership 1552391250
 Club Shirt
 Add a new fee type

Click save to complete

Select fee type

e.

- If the fee type does not exist, you can select "Add a new fee type" to create a new type that can be reused for other fees moving forward. Click on the option to add a new fee type, enter a label for the fee type and then click add to make it available for use.

Add Fee

Name*

Description*

Price*
\$ 0.00 includes GST

Fee Type*

Membership 1552391250
 Club Shirt
 Add a new fee type

Add New Label

Click add a new fee type. Enter the label for the new fee type below

Click add to make fee type available

g.

3. Once a fee item is added, you can click on the action menu to edit it as required, or to delete it if it is no longer required. Any of the details entered above can be edited.

Fees

Fee Items **Fee Packages** **Fee Labels**

List of club fees *View, create and manage your club fees. Group these into Fee Packages to assign to your members.*

Title	Description	Type	Price (inc. GST)	
Monthly Membership 1552391250	Monthly Membership Demo Fee	MEMBERSHIP 1552391250	\$16.82	⋮
Club Shirt	Club Shirt	CLUB SHIRT	\$	

Click here to open the action menu

Select edit fee to change the details or remove fee to delete

a.

Fee Packages

The fee package groups the items together. For example, a member may have a membership fee and a club shirt fee, which all financial members are required to pay. These would be grouped together in the fee package.

1. Adding a fee package.
 - a. When adding a new fee package you will need to follow the below steps:
 - b. Click on the "Add Fee Package" button at the top right-hand corner.

Fees

Fee Items **Fee Packages** **Fee Labels**

Club Fee Packages *Group your club fees into packages that can be assigned to your members*

Title	Type	Valid For	Price (inc GST)	GST	Assigned to	
Monthly Membership Package 1552391250		1 month	\$245.00	\$22.27	68 members	⋮

Click here to select the fee packages

Click add fee package

c.

- d. Once done you will be prompted to add the following details to complete the fee package setup:
 - i. Package Name - Give the fee package you are creating a name that is relevant and that will be understood by your members.

- ii. Description - Give more specific details what this fee package is for to help your members understand what it relates to and what it covers.
- iii. Billing Cycle - You need to set the billing cycle for this fee package so the system knows when to charge a member.

Add Fee Package

Package Name*
Yearly Membership

Description

Billing Cycle*

- 1 Year
- 6 Months
- 3 Months
- 1 Month

SAVE CANCEL

iv.

Once a fee package has been added, you can configure it to use it with members. The key action is adding fee items to the package.

1. Adding fees to a package

- a. In this example we have a new fee package for a junior member. The package has been created but it is currently empty with no items added. Clicking on the action menu brings up the option to:
 - i. Add Fee Item - Adds a fee item to the package.
 - ii. Edit Package - Allows you to update details of the package.
 - iii. Remove Package - You can also remove a fee package should you no longer require it. Be aware that fee packages can only be removed when they are not assigned to any of your members. Since this package is empty, we can remove it.

Fees ADD FEE ADD FEE PACKAGE

Fee Items **Fee Packages** Fee Labels

Club Fee Packages Group your club fees into packages that can be assigned to your members

Title	Type	Valid for	Price Incl GST	GST	Assigned to	Action
Junior Membership		1 year	\$0.00	0%	0 members	...
> Monthly Membership Package 1552391250		1 month	\$245.00	0%	1 memb	...

b.

- c. When you select add fee item, the manage fees section will open. You can select a fee from the assign fees drop down menu, and assign it to the package. This can be done multiple times, to add a number of fee items as required. Once you have finished, click on the X to close the window.

Click here to see the fees list. Select the required fee

Click here once you have finished assigning fees

Click assign to add to the package. Multiple fees can be assigned

d.

2. Managing Fee Packages

- a. Now that the fees have been added to the package, you will be back on the fee package screen. There are options here to help you manage packages:
- You can expand a fee package to see the fees in the package
 - You can remove fees from a package
 - You can use the action menu to edit or remove the package as required.
 - See the number of members assigned to this package.

Click here to expand the package, to see fees included

Click here for the action menu

Click here to remove a fee from the package

Number of members assigned this package

Type	Valid for	Price Incl GST	GST	Assigned to
Junior Membership	1 year	\$230.00	\$20.91	0 members
Monthly Membership 1552391250	MEMBERSHIP 1552391250	\$185.00	\$16.82	
Junior Club Shirt	CLUB SHIRT	\$45.00	\$4.09	
Monthly Membership Package 1552391250	1 month	\$245.00	\$22.27	68 members

b.

Fee Labels

In the fee labels tab of your fees list you can manage and edit the labels assigned to your club's fee items.

You will be able to see all the details for a fee label when it is listed here. You will also be able to perform the following actions:

1. Edit Label - If certain details for your current fee label need to be updated you can do this here.
2. Delete Fee Label - You can also remove a fee label should you no longer require it. Please be aware that fee labels can only be removed when they are not assigned to any fees. This is available via the action menu.

Fees ADD FEE ADD FEE PACKAGE

Fee Items Fee Packages **Fee Labels**

Club Fee Labels *Manage and edit the labels assigned to your club's fee items*

Fee Type	Created	Assigned To	
Membership 1552391250	12th Mar 2019	1 Fees	...
Club Shirt	13th Mar 2019	2 Fees	... Edit Label
Uniform	11th Sep 2019	1 Fees	...

3.

4. If you select the edit label action, it will open an edit window, where you can change the label as required.

Edit Fee Label ×

Label*

Club Shirt

SAVE **CANCEL**

Assigned To

1 Fees

2 Fees

1 Fees

5.