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.

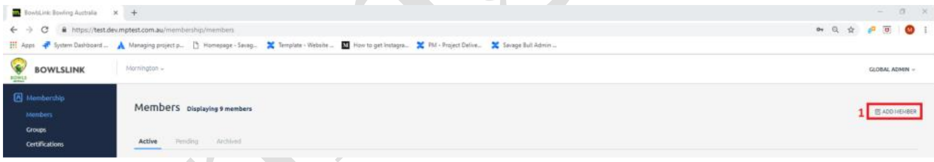
You will also be given the functionality to add new members.

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

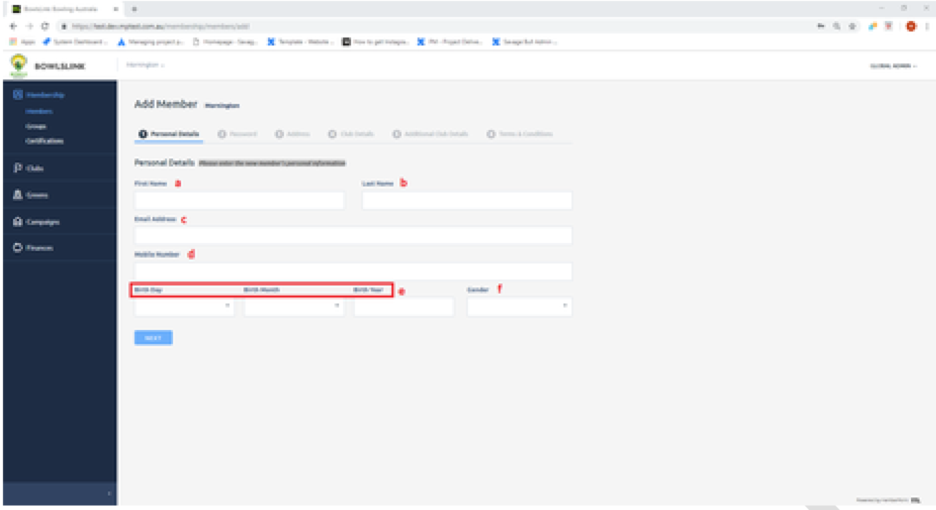
For each member listed here you will be able to retrieve further information by clicking on their name.

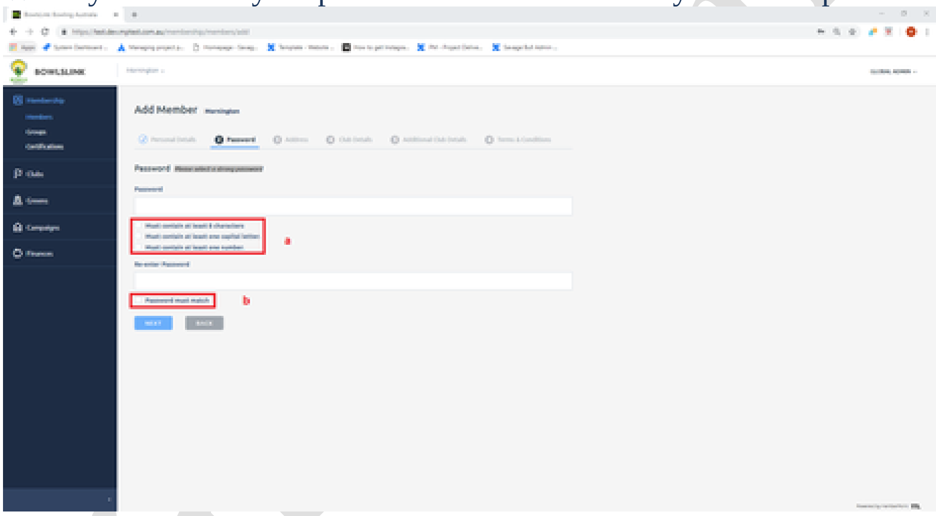
Adding a Member

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.

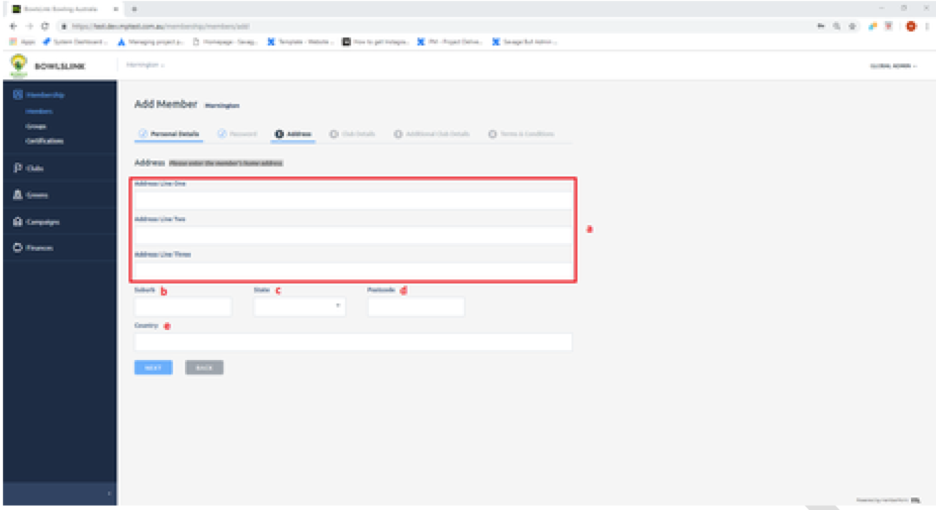
1. Select "Add Member"
   1. 

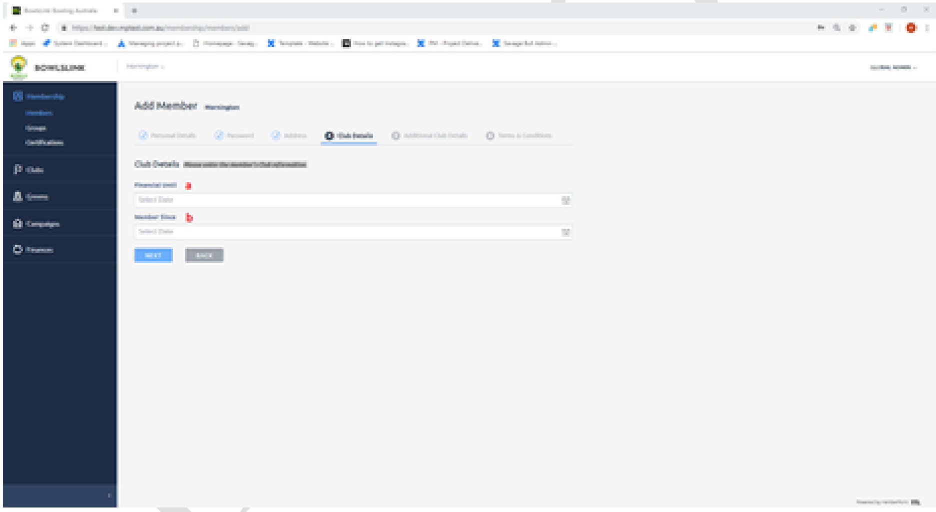
2. You will then be asked to provide personal details for the new member. Please enter the new member's personal information:
   1. First Name
   2. Last Name
   3. Email Address
   4. Mobile Number
   5. DOB
   6. Gender

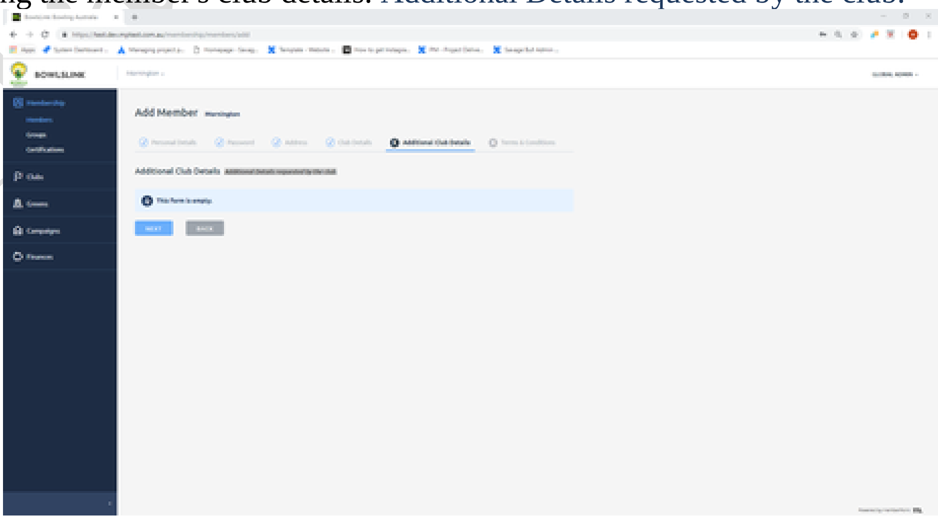
7. 

3. Next you will be asked to create a password. Please select a strong password.
    1. Your password needs to fulfil certain requirements to be considered strong
    2. When you re-enter your password it needs to match your initial password
    3. 

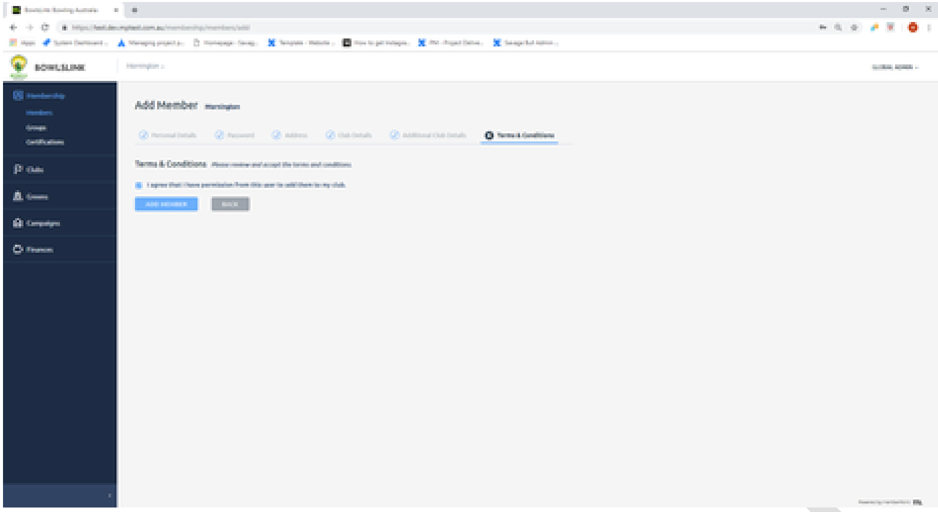
4. Once you have set up a password you will be required to enter the new member's address details. Please enter the member's home address.
    1. Address Lines
    2. Suburb
    3. State
    4. Postcode
    5. Country

6. 

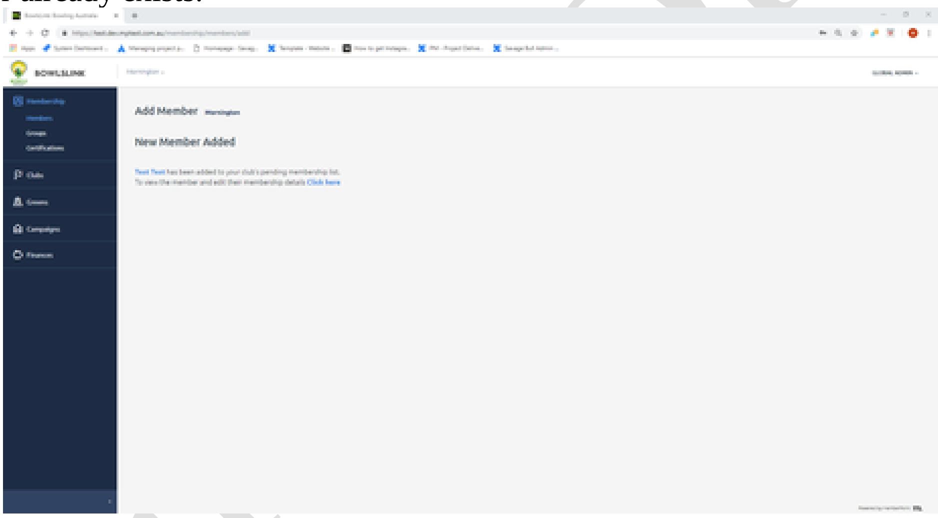
5. The fourth step is to provide club details for the new member. This information will be helpful when it is necessary to create invoices against a member. Please enter the member's Club information.
   1. Financial Until
   2. Member Since
   3. 

6. Should any additional club details be required, this can be provided in the step after providing the member's club details. Additional Details requested by the club.
   1. 

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.

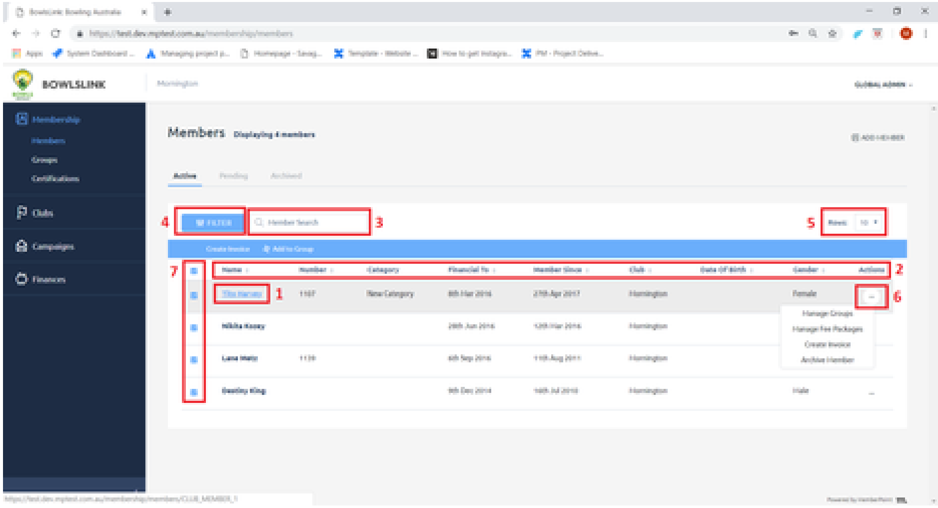
1. 

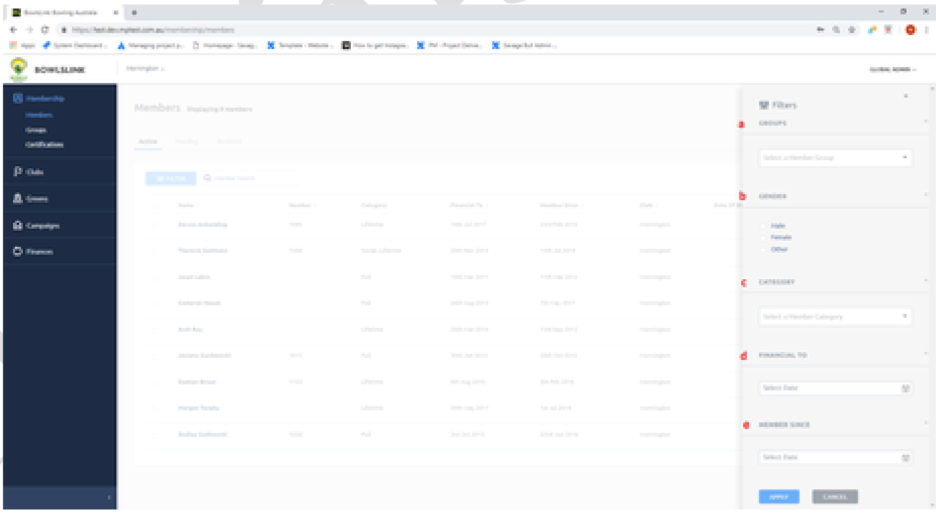
8. If you have provided all details correctly you will receive a notification confirming the new member. If some details are already in the system (e.g. mobile number or email) the system will bring up an error message. This usually indicates that a member already exists.

1. 

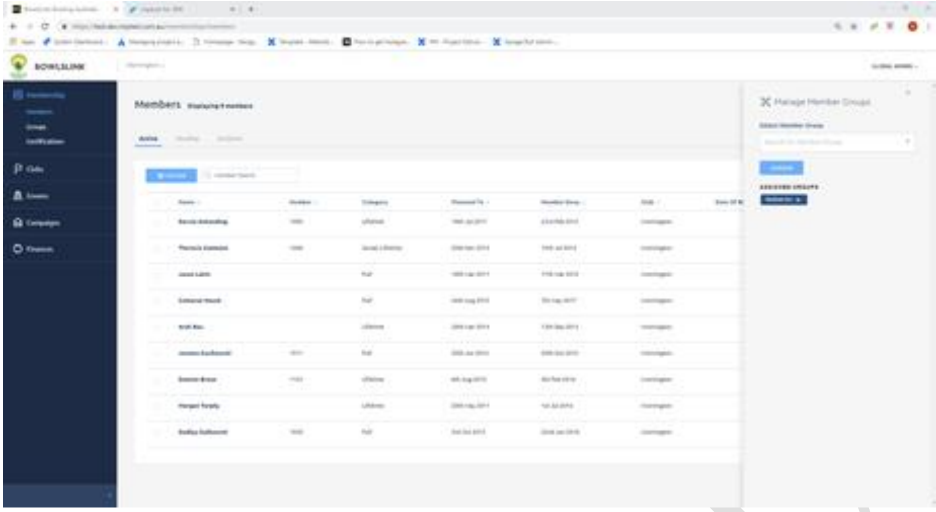
Active Members

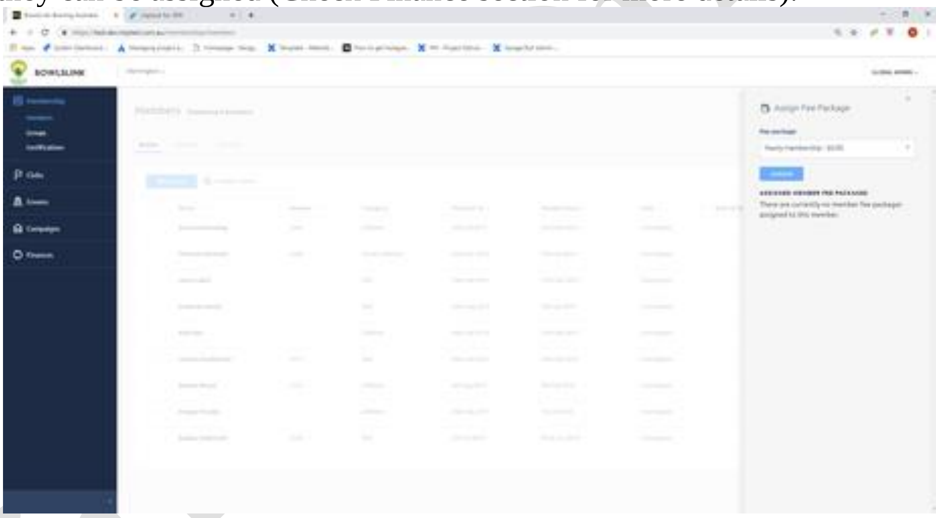
In the **active tab** of your members list you will be able to see all members that are currently active. You will also be given some of their member details without clicking into their profile and you will be able to perform the following actions:



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 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. You will be able to filter the following parameters:
    1. Groups
    2. Gender
    3. Category
    4. Financial To
    5. Member Since
    6. 

5. You will be able to change the amount of rows displayed in your member table.
6. You will be able to perform additional actions for individual members. Additional actions are:
    1. Manage Groups - You will be able to add or remove the selected user from member groups that have been created.

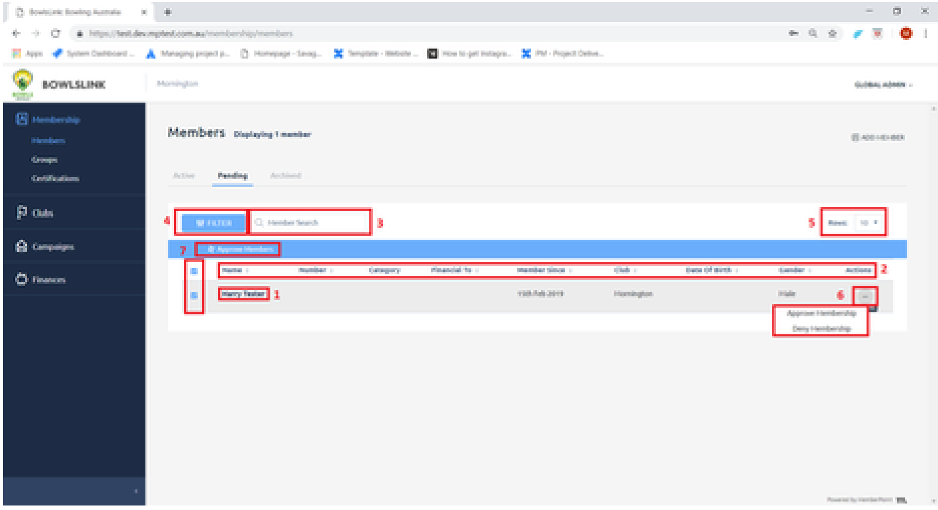
      1. 

   2. 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).
      1. 

   3. 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).
   4. Archive Member - You will be able to archive a selected member.
7. You will be able to bulk select all or a select group of members to perform additional actions. Additional actions are:
   1. Create invoice - You will be able to create and send bulk invoices if the selected members have been assigned the required fees.
   2. Add to Group - You will be able to add the selected members to a particular group that has already been created.

Pending Members

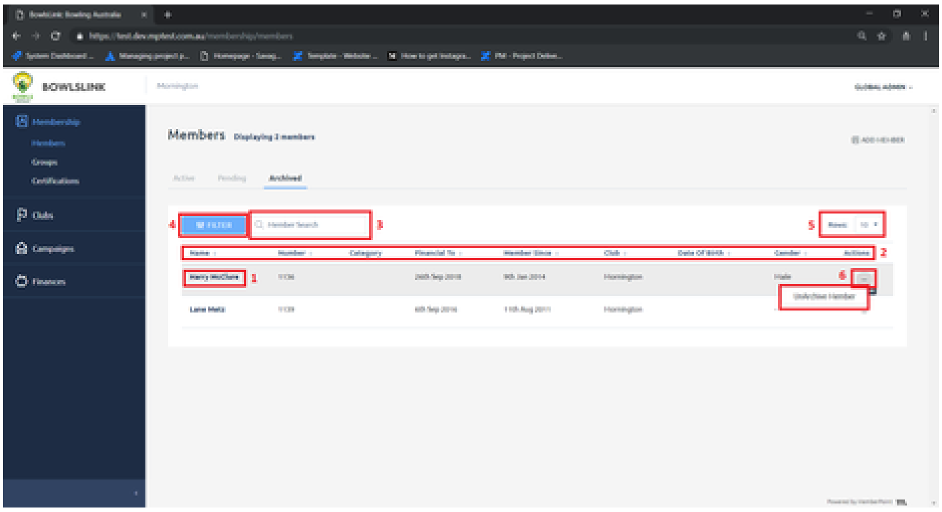
In the **pending tab** of your members list you will be able to see all members that are currently pending review. As per the active member list, you will be given some of their member details without clicking into their profile and you will be able to perform the following actions:



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 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 members)
5. You will be able to change the amount of rows displayed in your member table.
6. You will be able to perform additional actions for individual members. Additional actions are:
    1. Approve Membership - You will be able to approve the membership for the selected member.
    2. Deny Membership - You will be able to deny the membership for the selected member.
7. You will be able to bulk select all or a select group of members to perform additional actions. Additional actions are:
    1. Approve Members - You will be able to bulk approve all pending members.

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

Member - Detailed View

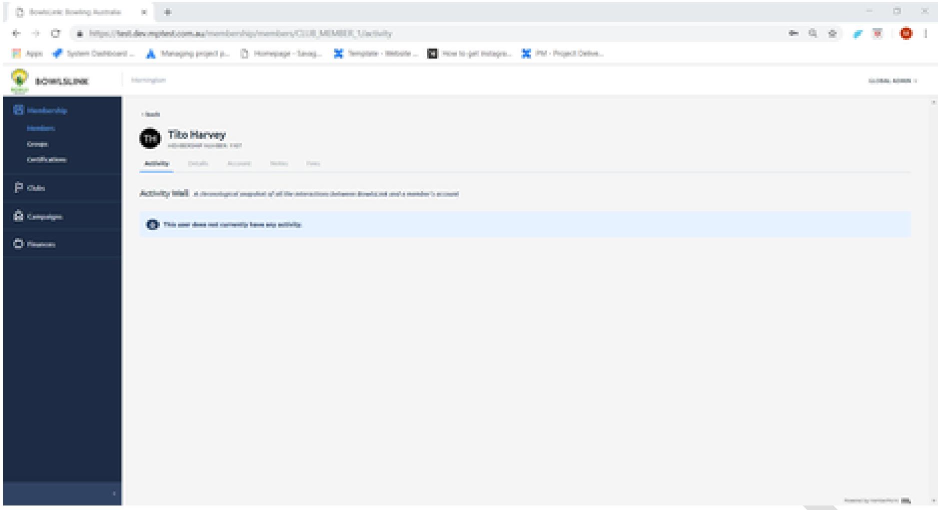
In the detailed view of a member you will be able to retrieve additional information about the member as well as being able to perform additional administrative actions.

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

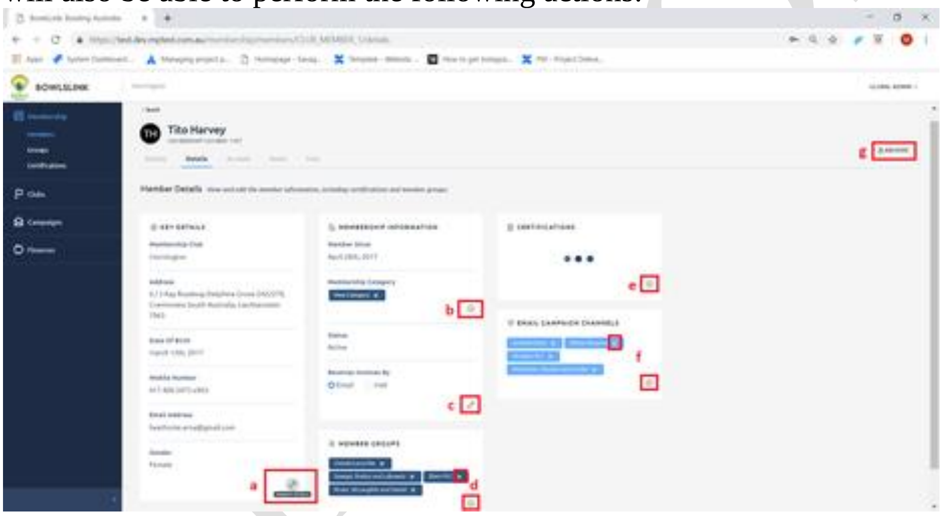
This is the same for active, pending and archived members.

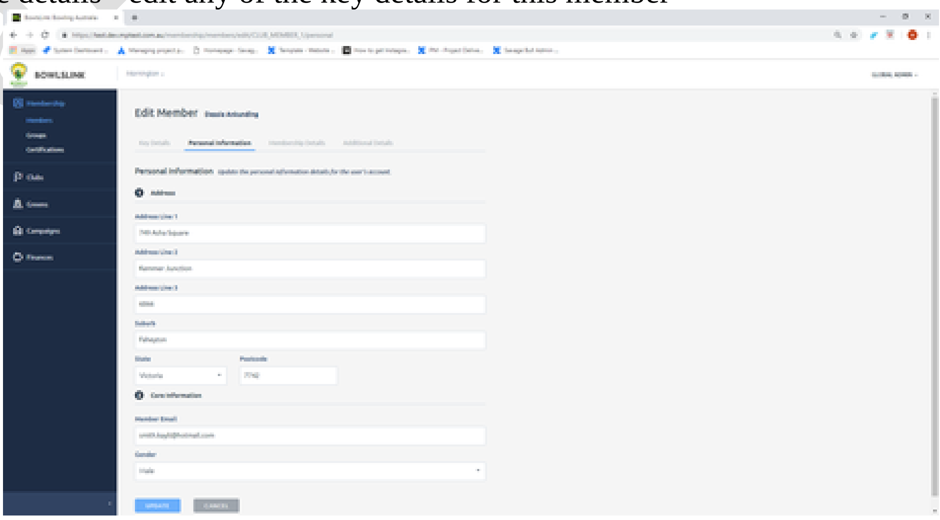
Activity

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

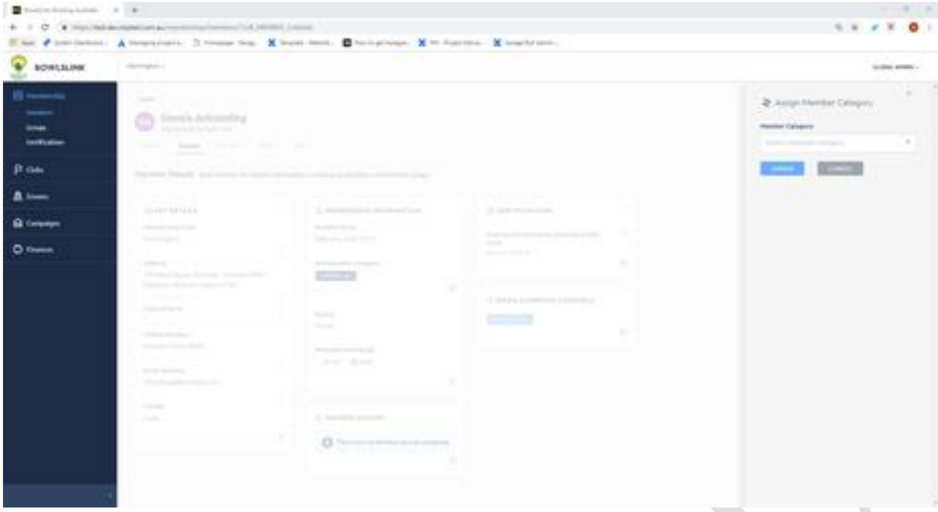
1. 

Details

1. The second tab is the **Details tab** where you will find most member information. You will also be able to perform the following actions:
2. 

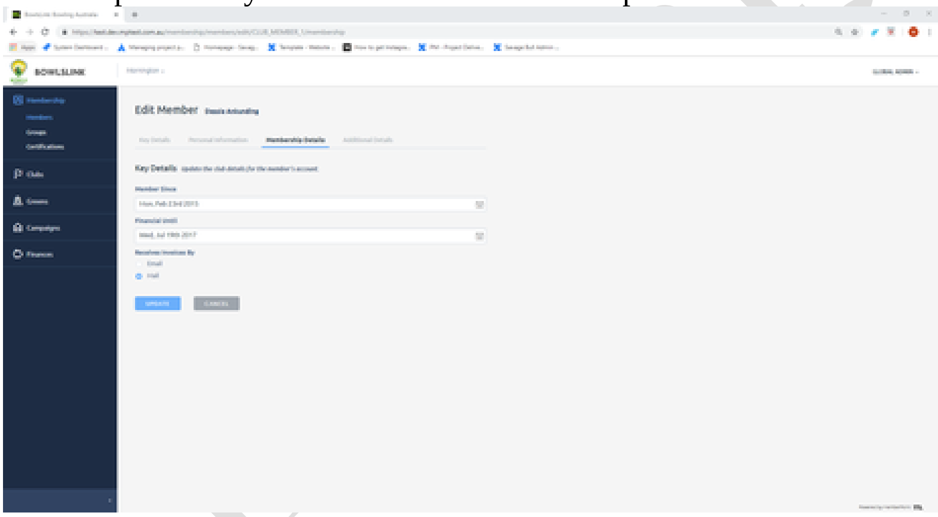
    1. Manage details - edit any of the key details for this member
        1. 

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



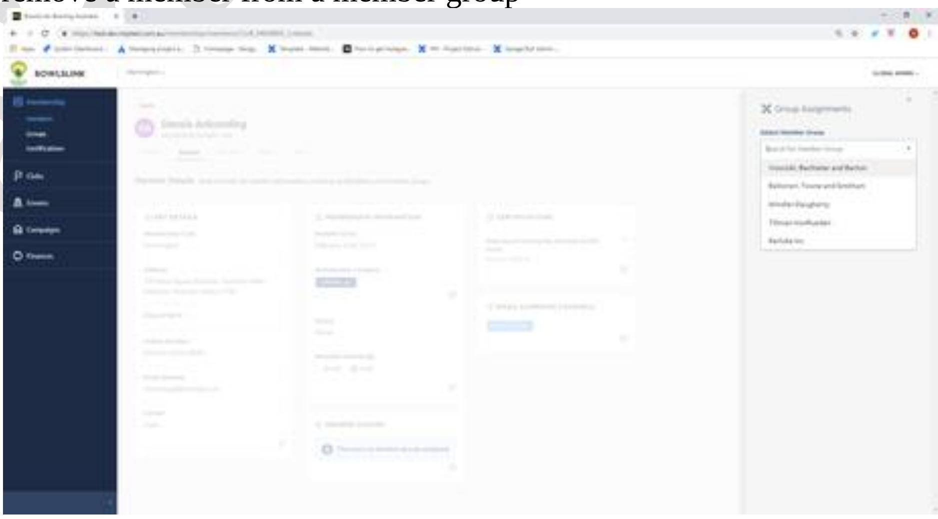
1.

3. Edit Membership - edit any of the members' membership information



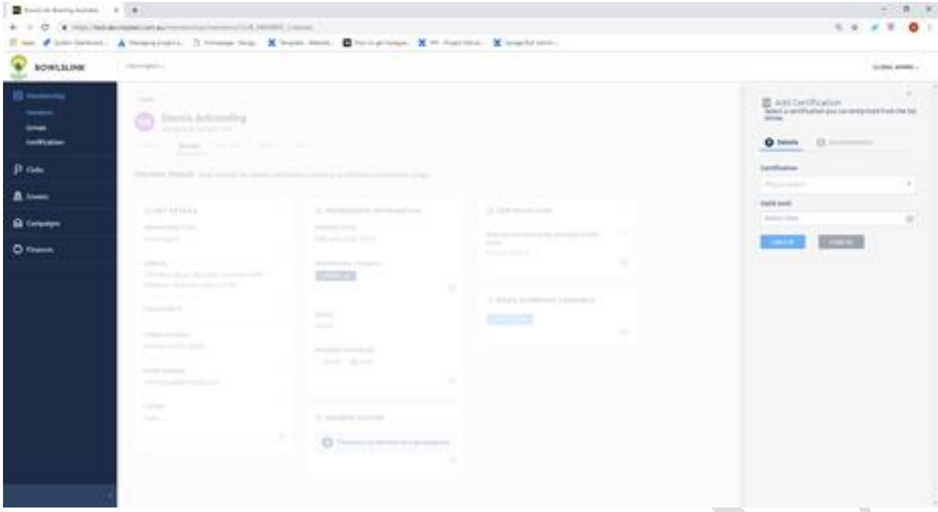
1.

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

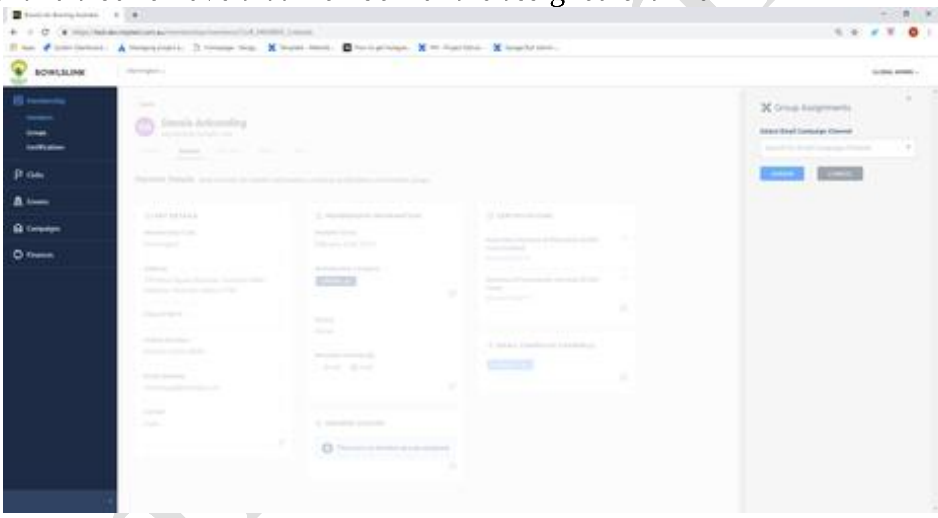


1.

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

1. 

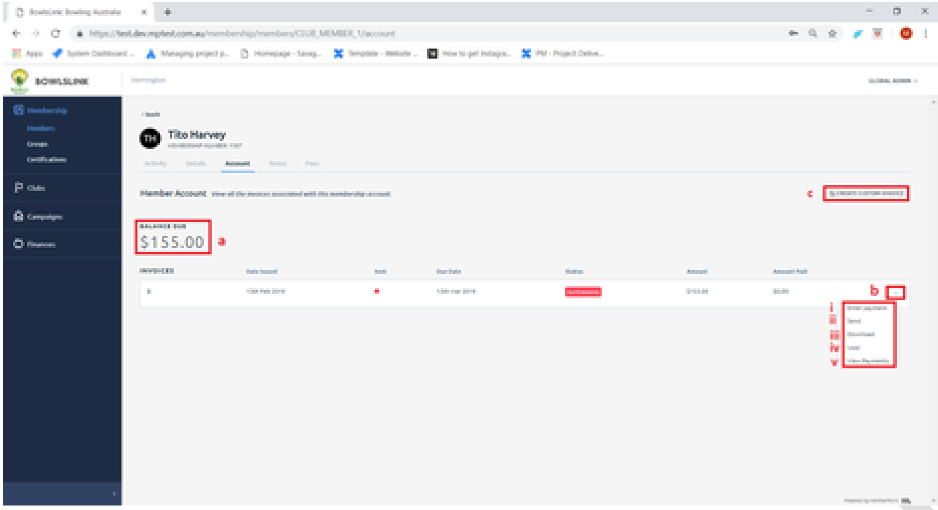
6. Add to Group - you will be able to add the member to an Email Campaign Channel and also remove that member for the assigned channel

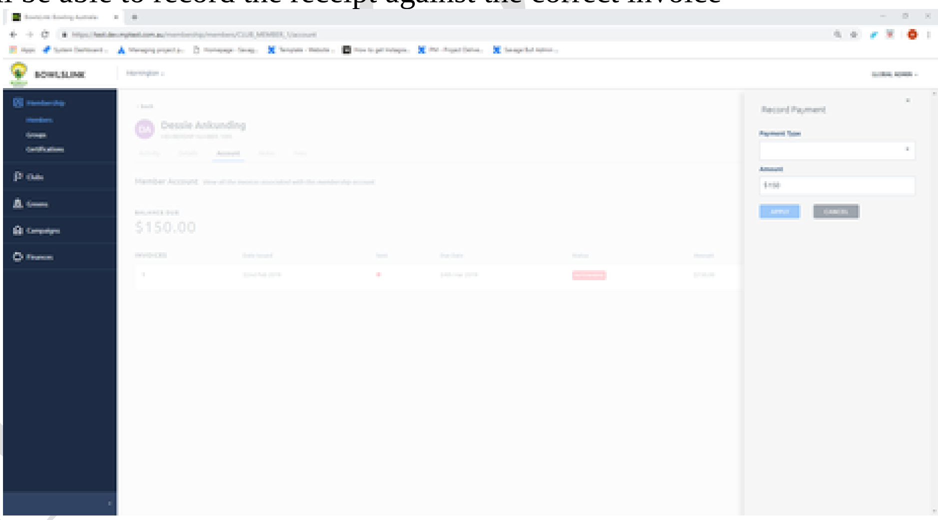
1. 

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.

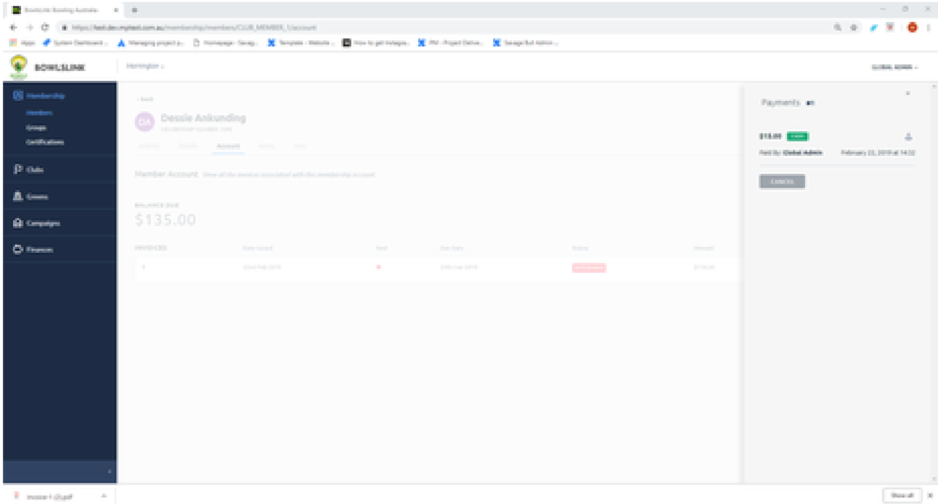
Account

1. 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:

2. 

    1. You will be able to see any monies owing by this member
    2. You will be able to perform specific actions against an invoice for this member such as:
        1. Enter payment - If your club has received money from this member you will be able to record the receipt against the correct invoice
            1. 

        2. 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.
        3. Download - You will be able to download the invoice
        4. Void - If an invoice is no longer required to be paid by a member you will be able to void the invoice here.
        5. 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.

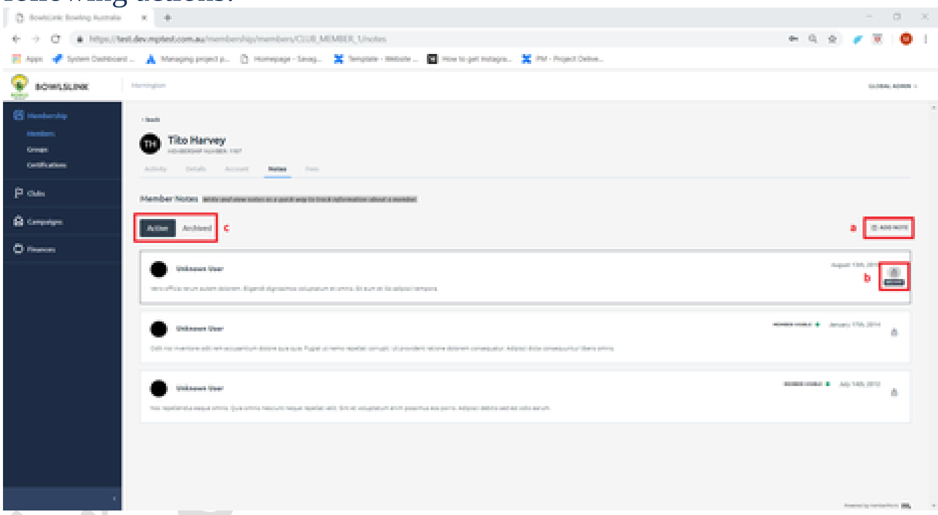


1.

3. 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.

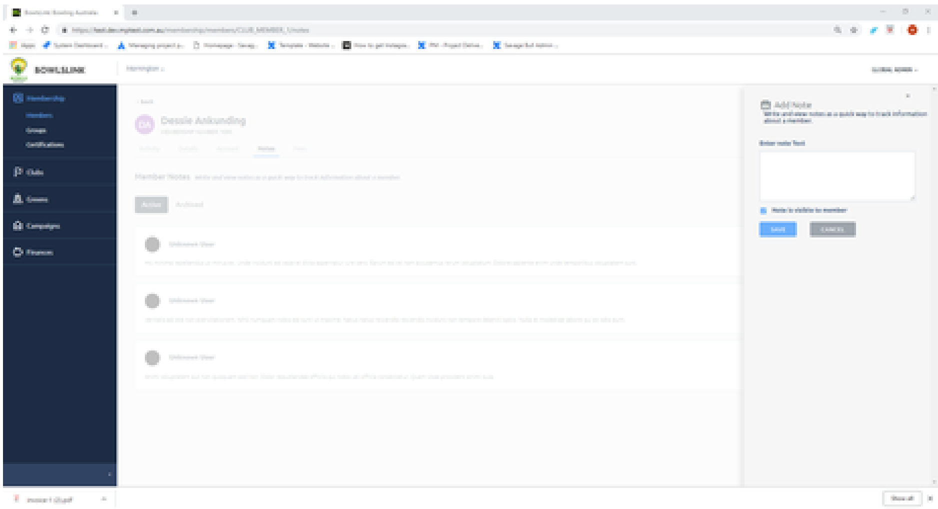
Notes

1. 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:



2.

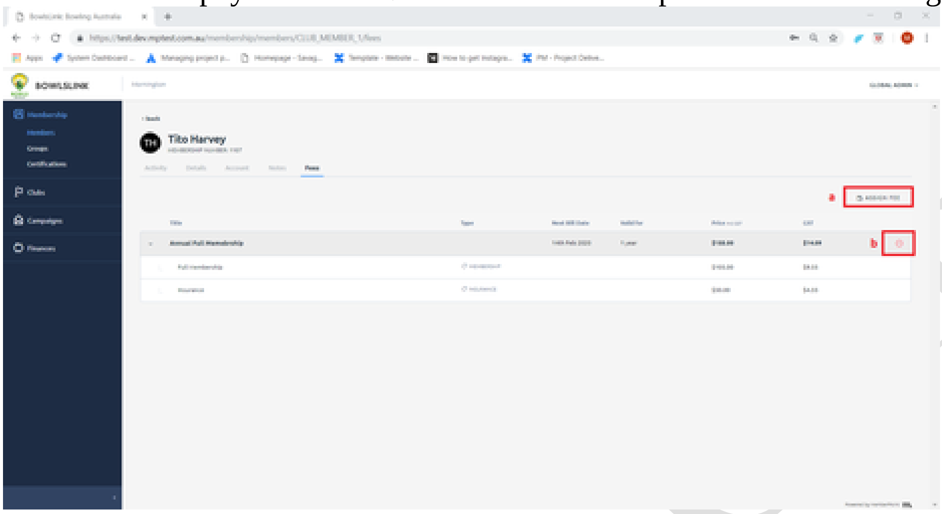
   1. Add notes for a member



1.

2. Archive existing notes that are no longer required.
3. View current notes and archived notes

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:
2. 

    1. 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)
    2. 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.

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.

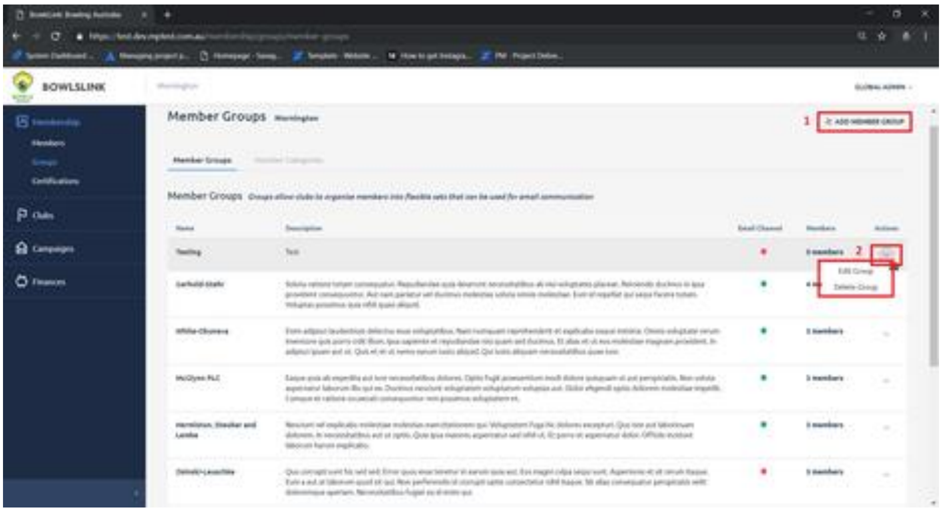
The list is divided into two sections (tabs) - Member Groups and Member Categories.

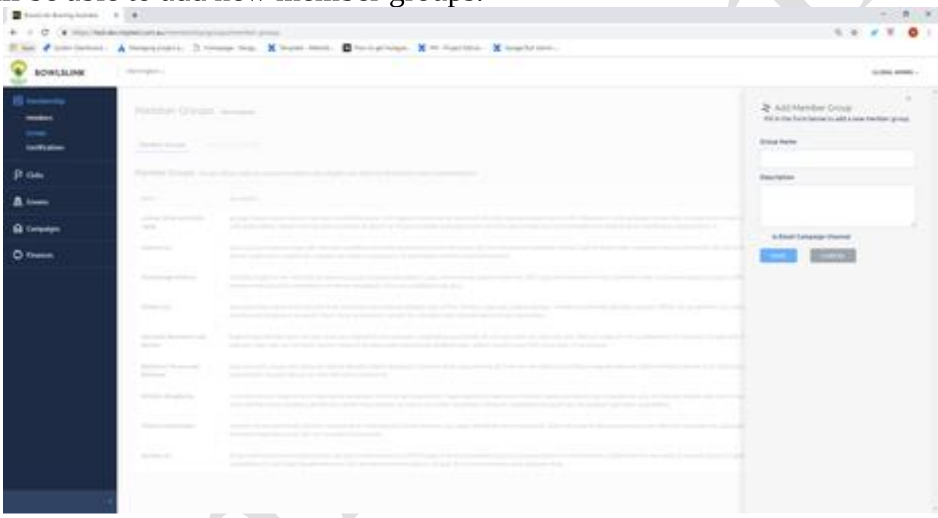
You will also be given the functionality to add new member groups and new member categories.

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:

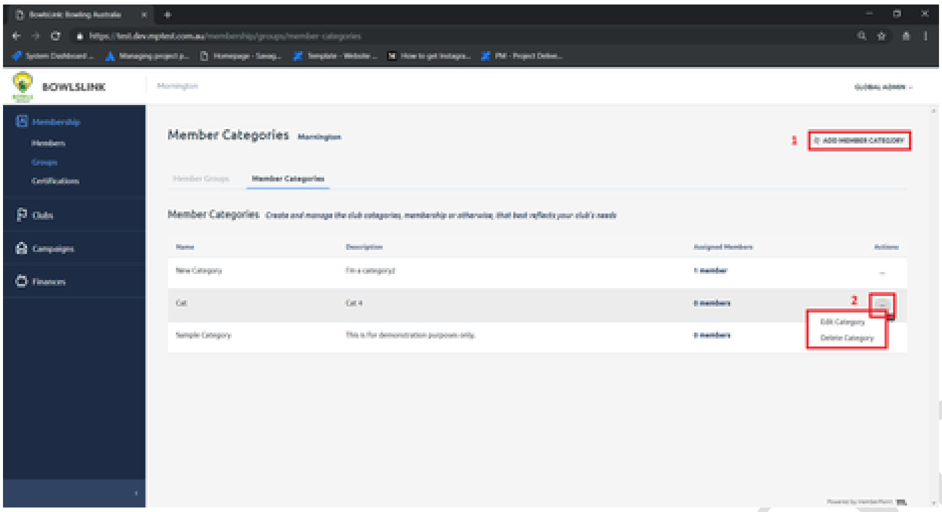


1. You will be able to add new member groups.
    1. 

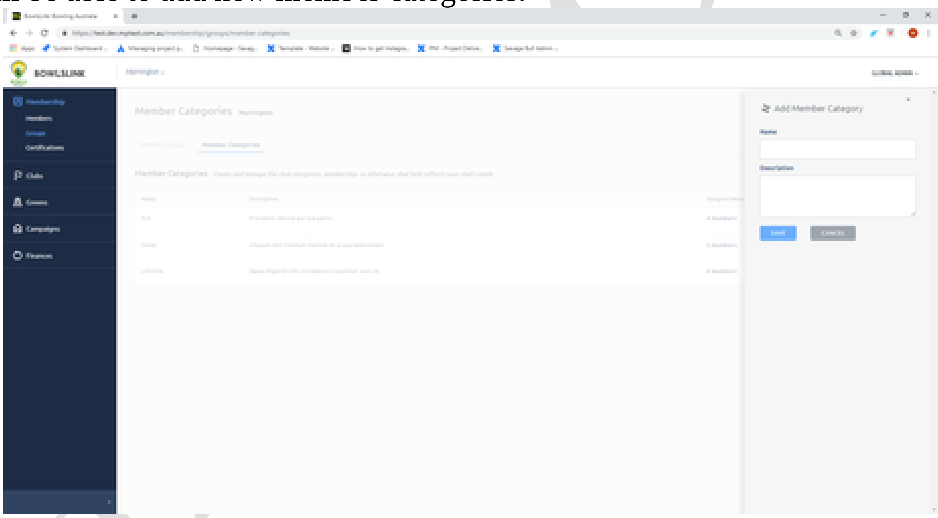
2. You will be able to edit or delete existing member groups (**Attention:** Groups can only be deleted when no members are associated to this category).
    1. 

Member Categories

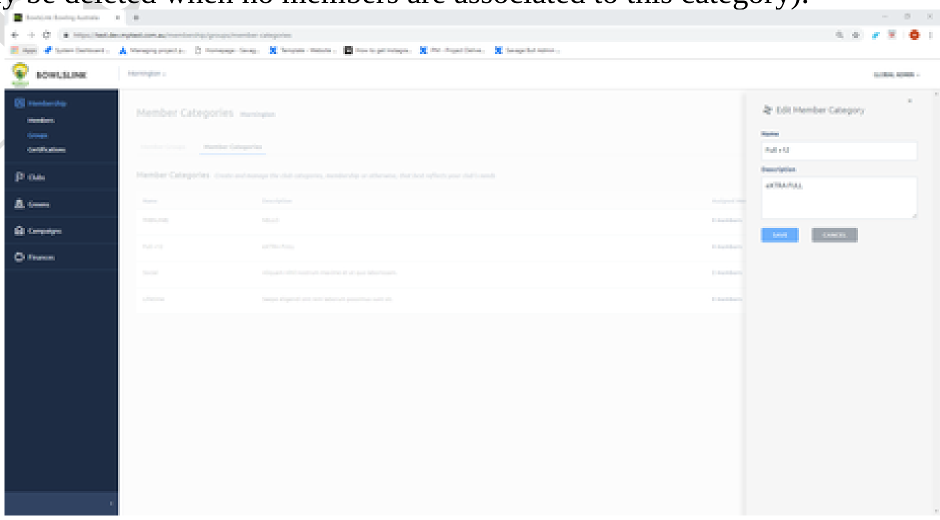
In the **member categories tab** of your list you will be able to see all member categories that have already been created. You will also be given an overview of some of the categories' details. Furthermore, you will be able to perform the following actions:



1. You will be able to add new member categories.

    1. 

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).

    1. 

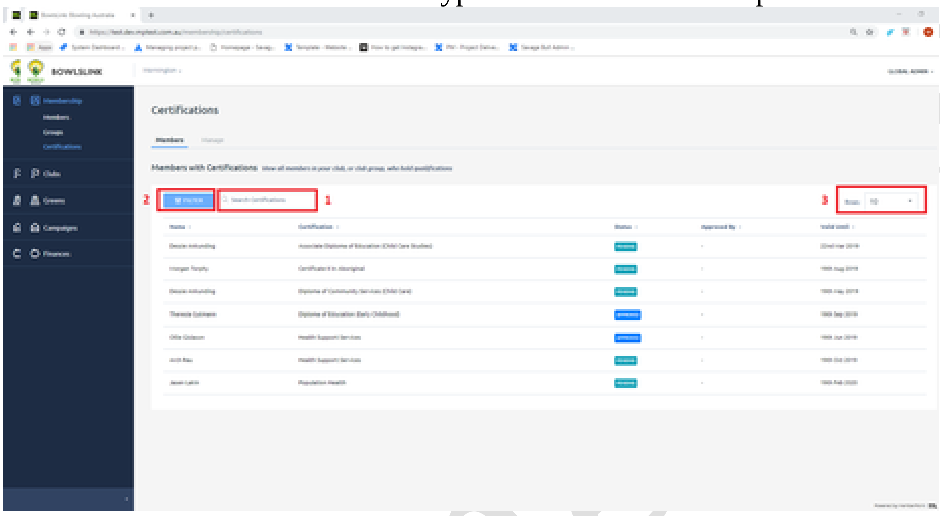
Certifications

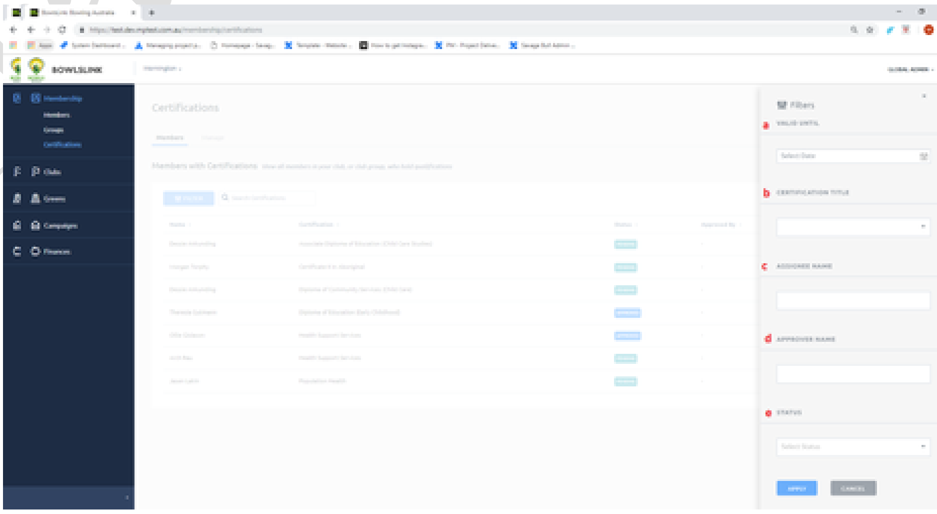
When you are in the certifications section you will be provided with a list of all the members currently holding a certification in your club.

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:

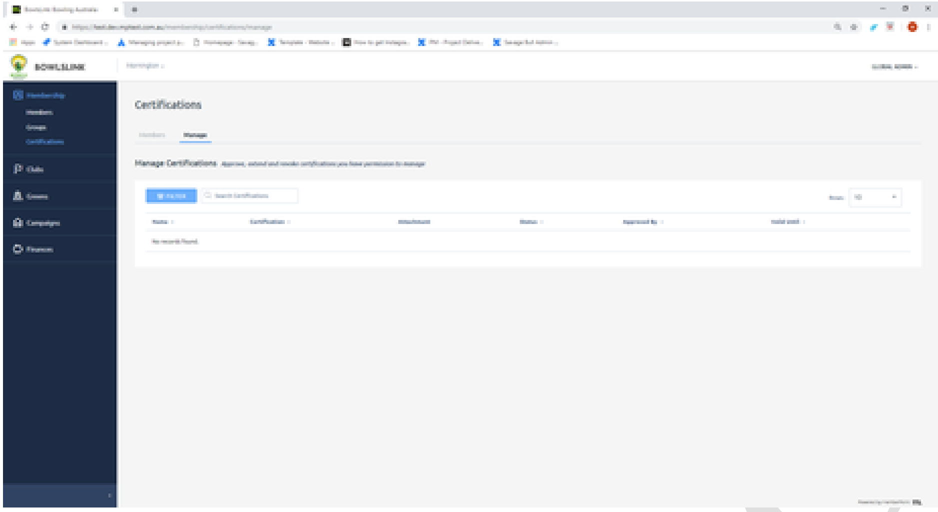


1. You will be able to search for a particular certification by name.
2. You will be able to apply specific filters to only find certifications matching your search criteria.
    1. Expires Before
    2. Certification Title
    3. Assignee Name
    4. Approver Name
    5. Status
    6. 

3. You will be able to change the amount of rows displayed in your certifications table.

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.



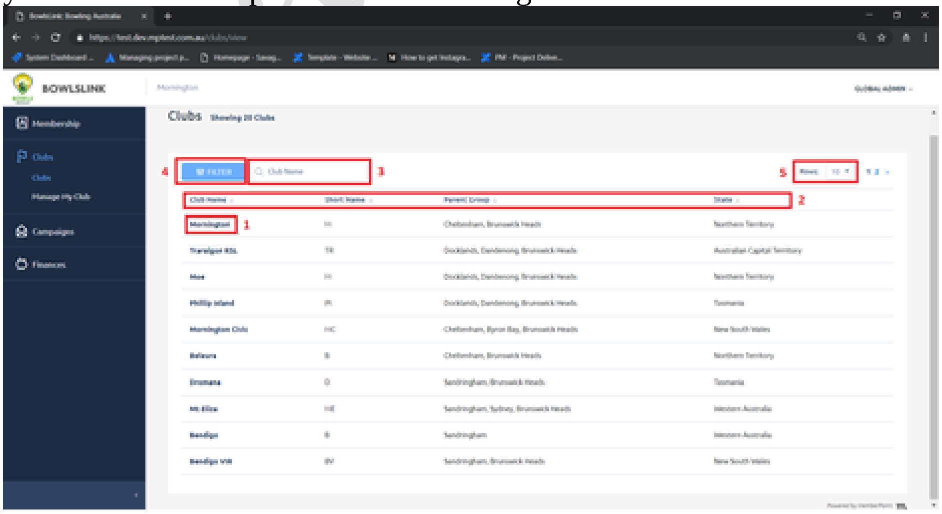
Clubs

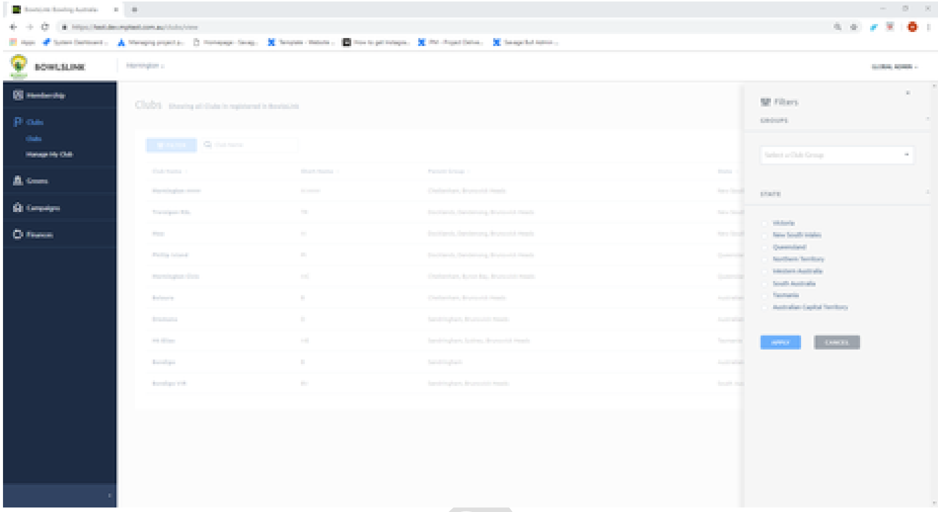
In the clubs section of BowlsLink you will be able to find all information related to your club and any other clubs you have the permission to see.

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

Clubs

In the **clubs sub-section** you will be able to see all clubs that are currently active in BowlsLink. 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 sort the list of clubs differently by clicking on the different column headers.
3. You will be able to search for a particular club by name.
4. You will be able to apply specific filters to only find clubs matching your search criteria.
    1. Groups
    2. States
    3. 
5. You will be able to change the amount of rows displayed in your club table.

Manage My Club

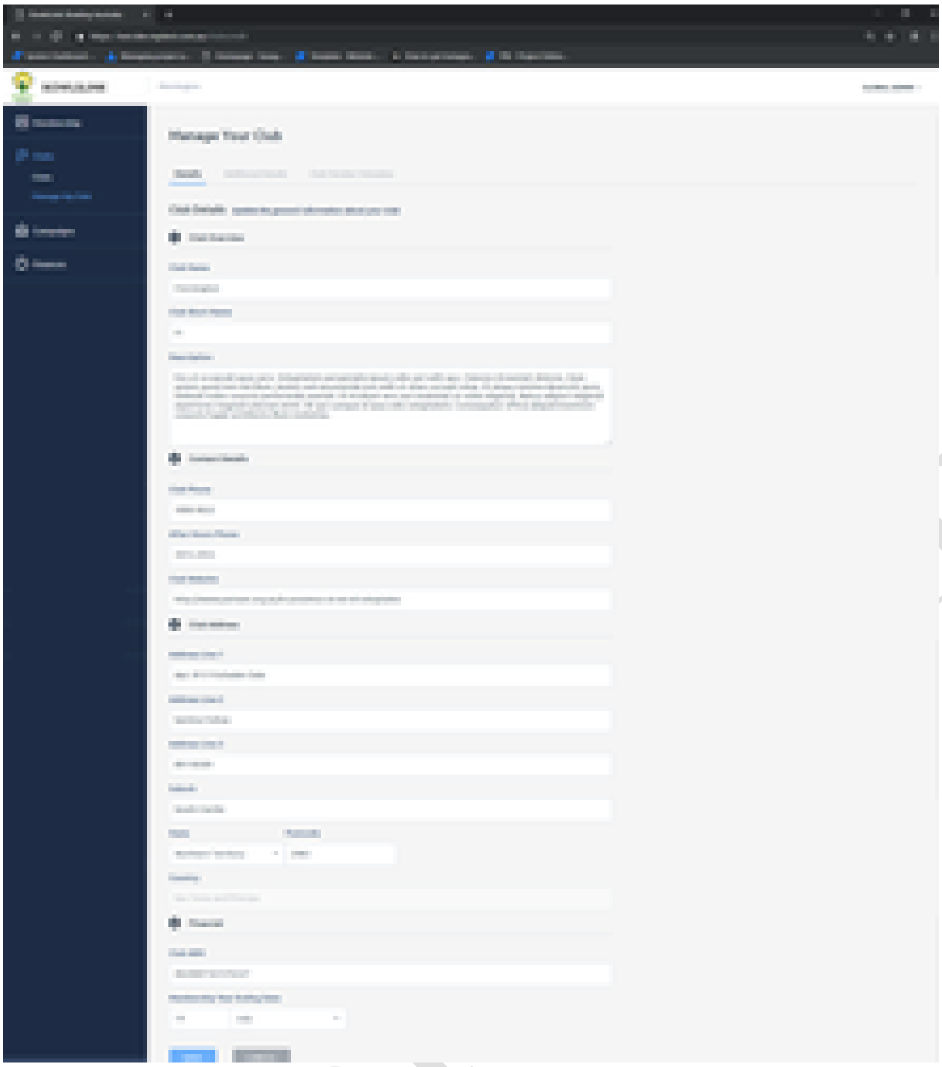
In the **manage my club sub-section** you will be able to see all the details relevant to your club. You will be able to edit all the club information for your club.

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

Details

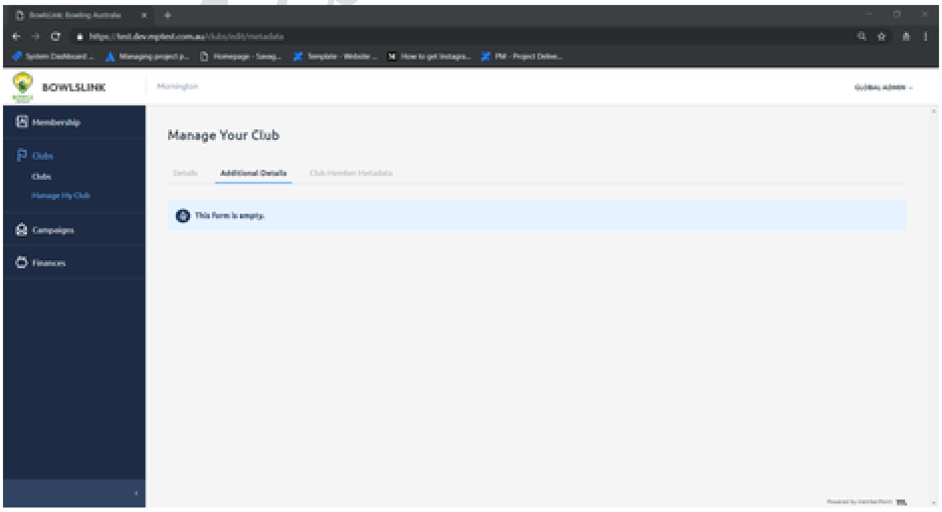
In the details tab of your club you will be able to edit the following field groups:

1. Club Overview
2. Contact Details
3. Club Address
4. Financial

5. 

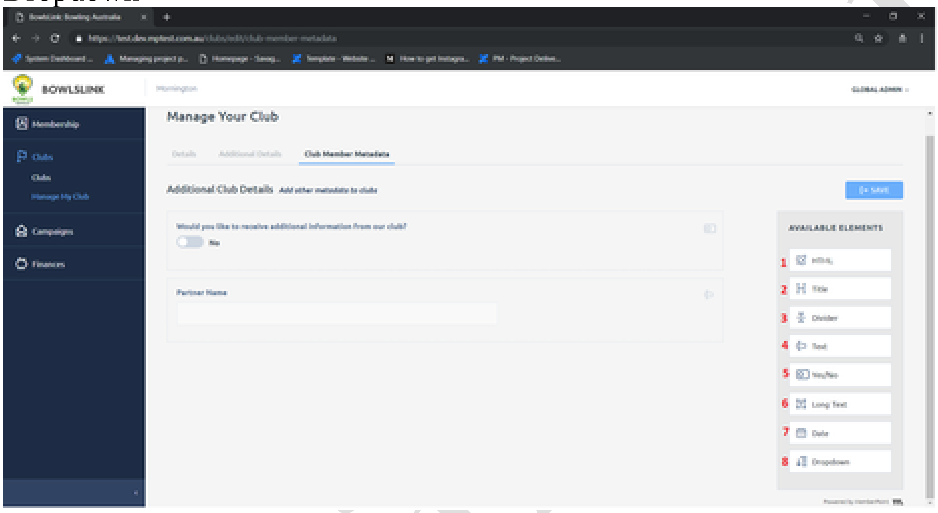
Additional Details

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



Club Member Metadata

In the club member metadata 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:

1. HTML
2. Title
3. Divider
4. Text
5. Yes/No
6. Long Text
7. Date
8. Dropdown
9. 

Campaigns

When you are in the campaigns section you will be provided with a list of all campaigns currently available.

You will also be given the functionality to create new campaigns.

The list is divided into three sections (tabs) - sent, drafts and scheduled.

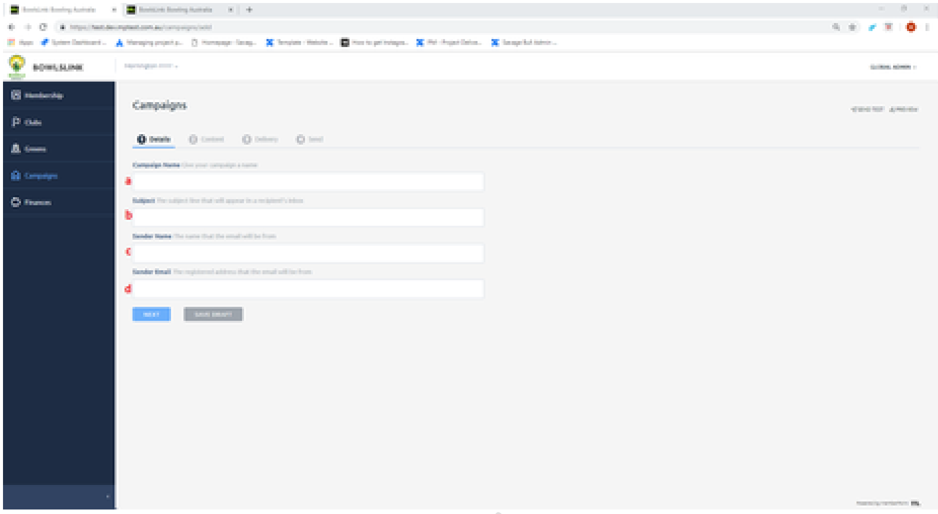
For each campaign listed here you will be able to retrieve further information through various actions.

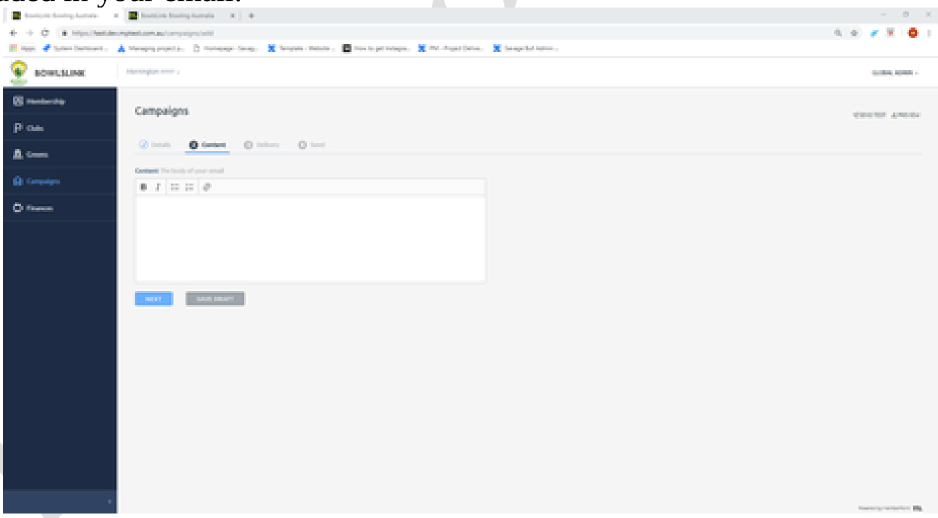
Creating a campaign

When you create a new campaign you will need to go through a few steps to get the campaign to a state where it can be broadcasted.

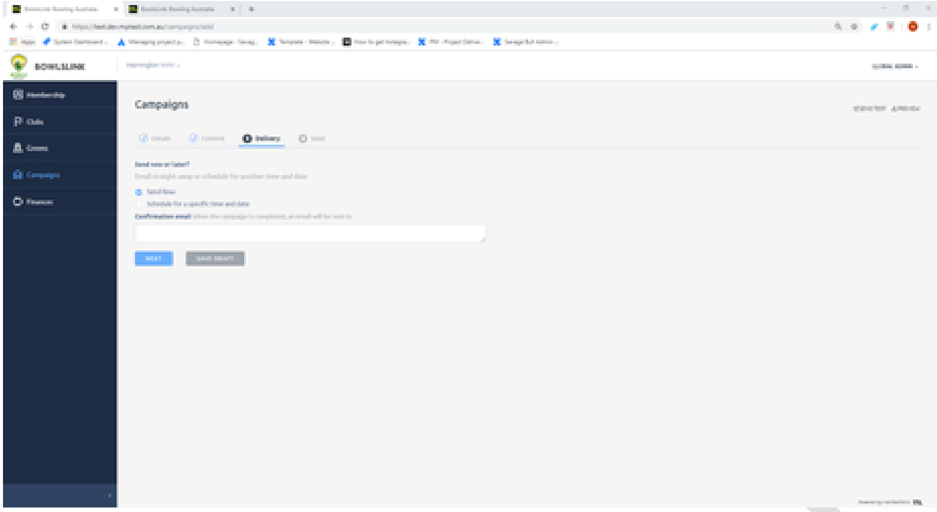
Select "Create Campaign" from the top right-hand corner. 

Each step requires further information to be provided into the specific fields listed here. The below steps need to be followed to create a new campaign successfully.

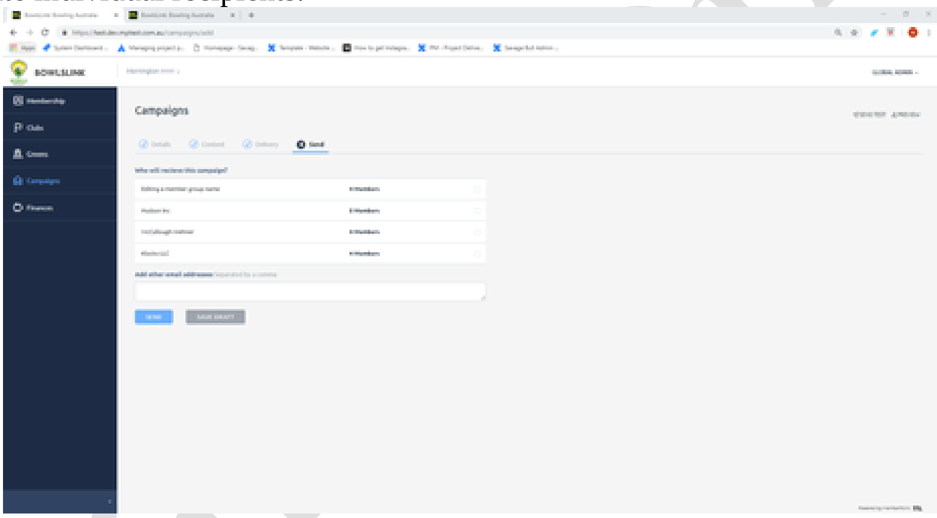
1. **Details** - You will be asked to provided the following information:
    1. Campaign Name
    2. Subject
    3. Sender Name
    4. Sender Email
    5. 

2. **Content** - Here you will be able to provide and style all the content you would like to be included in your email.
    1. 

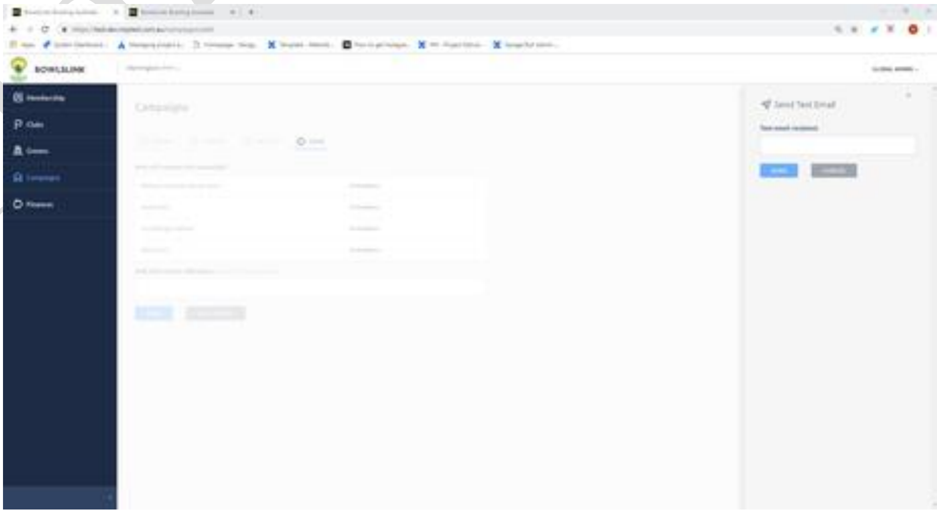
3. **Delivery** - In the delivery section of your campaign you will be able to specify when your campaign should be sent.

1. 

4. **Send** - In this final step you will be able to specify who should receive your email. You can either select recipient groups you have created previously or you can nominate individual recipients.

1. 

5. **Send Test** - During each of the four steps above you are able to send a test for your email. You will need to provide an email address to send the test to. The system will then send the email at the current state.

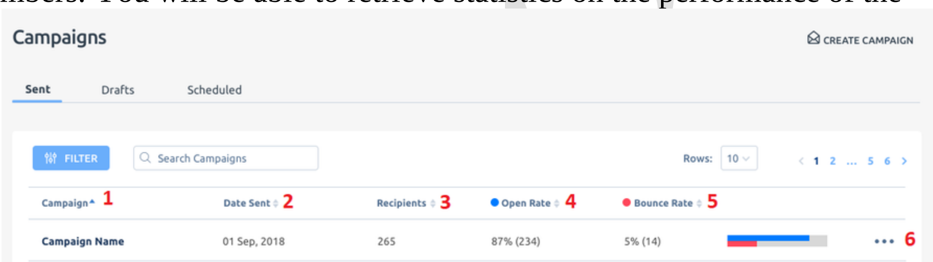
1. 

6. **Preview** - During each of the four steps above you are able to preview your email at its current state. This will help you identify if there are any more changes required to be made to your current email.

1.

Sent

In the **sent tab** of the listed campaigns you will find all campaigns that have been broadcasted to members. You will be able to retrieve statistics on the performance of the campaign such as:



1. Campaign Name
2. Date Sent
3. Number of recipients
4. Open rate
5. Bounce rate
6. More actions (e.g. Click through rate)

Drafts

In the **drafts tab** of the listed campaigns you will find all campaigns that are currently in draft status. These campaigns have not been broadcasted yet and can still get changed. You will be able to perform the following actions:

1. You will be able to search for a campaign by name.
2. You will be able to change the amount of rows displayed in your campaigns table.
3. You will be able to perform additional actions
    1. Edit - If your campaign still requires some work you will be able to continue to edit your campaign before sending it to your recipients. When editing a campaign you will be shown the same options as when you set up the campaign initially.

2. Clone - If you need to duplicate a campaign you can do that here.
3. Add Image - You can also add an image to your current draft.

Scheduled

In the **scheduled tab** of the listed campaigns you will find all campaigns that are currently scheduled for broadcasting.

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.

Invoices

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

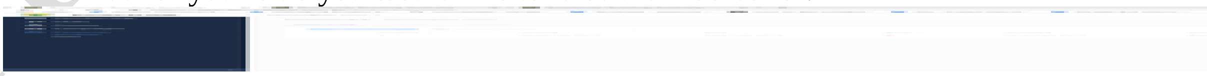
You will also be given the functionality to create custom invoices.

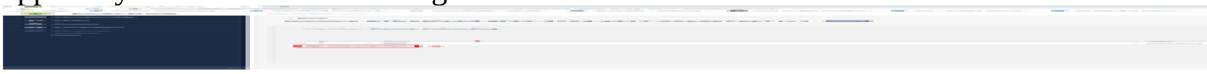
The list is divided into three sections (tabs) - approved, draft and voided.

For each invoice listed here you will be able to retrieve further information by clicking on the desired invoice.

Creating a custom invoice

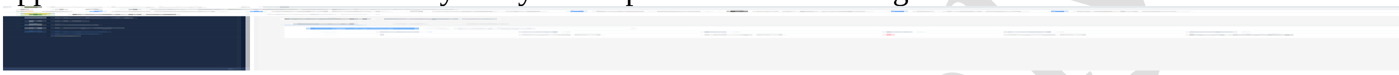
When creating a custom invoice for a particular member of your club you will need to follow the below steps.

1. Click "Create Custom Invoice" in the top right-hand corner. 
2. Select the member of your club you would like to raise the invoice for.
    1. 
3. 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 - You will be able to provide detail what you are invoicing the member for.
        1. Item
        2. Type
        3. GST
        4. Total
    2. Select date - You can specify when the invoice was issued and when the invoice is due for payment

3. Delete - If your invoice is no longer required you can delete the current version of your invoice.
4. Download - If you need to save your invoice externally or print it you will be able to download the invoice for further actions.
5. Approve - Once you have included all required details in your invoice you can approve your invoice for actioning.
6. 

Approved

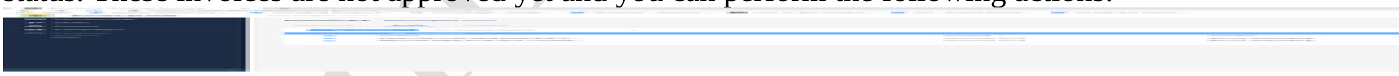
In the **approved tab** of the listed invoices you will find all invoices that are currently approved. These invoices are ready and you can perform the following actions:



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 where made you can do this here.

Draft

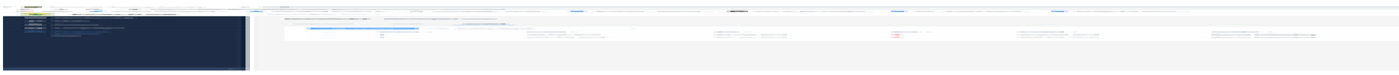
In the **draft tab** of the listed invoices you will find all invoices that are currently in draft status. These invoices are not approved yet and you can perform the following actions:



1. Edit
2. Delete
3. Approve
4. Download

Voided

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



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.

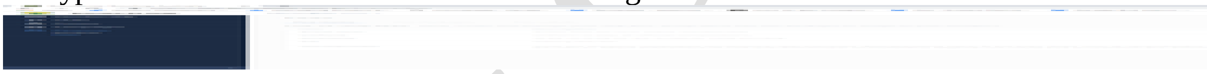
You will also be given the functionality to add fees and fee packages.

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

Adding a Fee

When adding a new fee to your fee items you will need to follow the below steps:

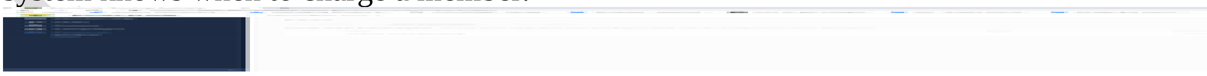
1. Click on the "Add Fee" button at the top right-hand corner. 

2. Once done you will be prompted to add the following details to complete the fee setup:
    1. Name - Give the fee you are creating a name that is relevant and can get recognised by your members
    2. Description - Give more specific details what this fee is for to help your members understand what this fee relates to.
    3. Price and GST - Specify the price of the fee and whether it should include GST.
    4. Fee Type - You can select a fee type that already exists or you can "Add a new fee type" that can be reused for other fees moving forward.
    5. 

Adding a Fee Package

When adding a new fee package you will need to follow the below steps:

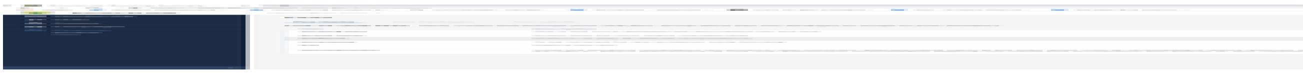
1. Click on the "Add Fee Package" button at the top right-hand corner. 

2. Once done you will be prompted to add the following details to complete the fee package setup:
    1. Package Name - Give the fee package you are creating a name that is relevant and can get recognised by your members
    2. Description - Give more specific details what this fee package is for to help your members understand what it relates to.
    3. Billing Cycle - You need to set the billing cycle for this fee package so the system knows when to charge a member.
    4. 

Fee Items

In the **fee items tab** of your fees list you will be able to see all the fee items currently available for assignment to a fee package.

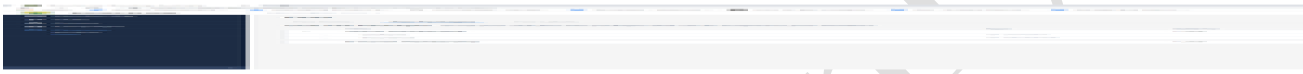
You will be able to see all the details for a fee when it is listed here. You will also be able to perform the following actions:

1. 
    1. Edit Fee - If certain details for your current fee need to be updated you can do this here.
    2. Remove Fee - If a fee item is no longer relevant you can remove it here.

Fee Packages

In the **fee packages tab** of your fees list you can group your club fees into packages that can be assigned to your members.

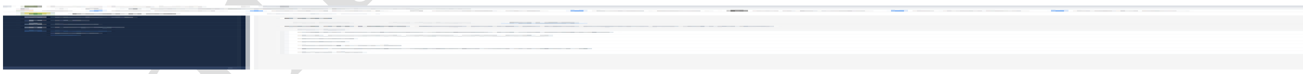
You will be able to see all the details for a fee package when it is listed here. You will also be able to perform the following actions:

1. 
    1. Add Fee Item - Once you have created your fee package you will be able to assign all the required fees to it. You can do this here.
    2. Edit Package - If certain details for your current fee package need to be updated you can do this here.
    3. Remove Package - You can also remove a fee package should you no longer require it. Please be aware that fee packages can only be removed when they are not assigned to any of your members.

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. 
    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.