Club Membership Admin

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.

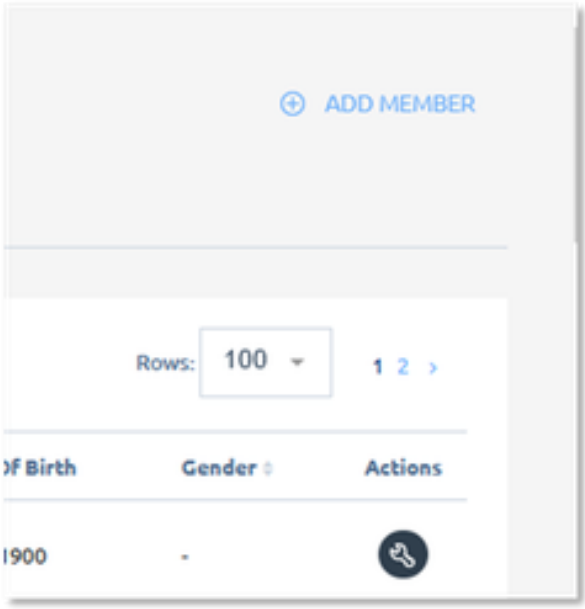
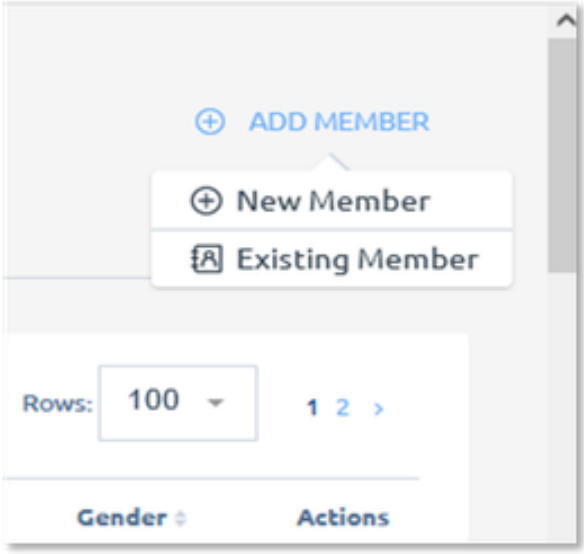
Membership

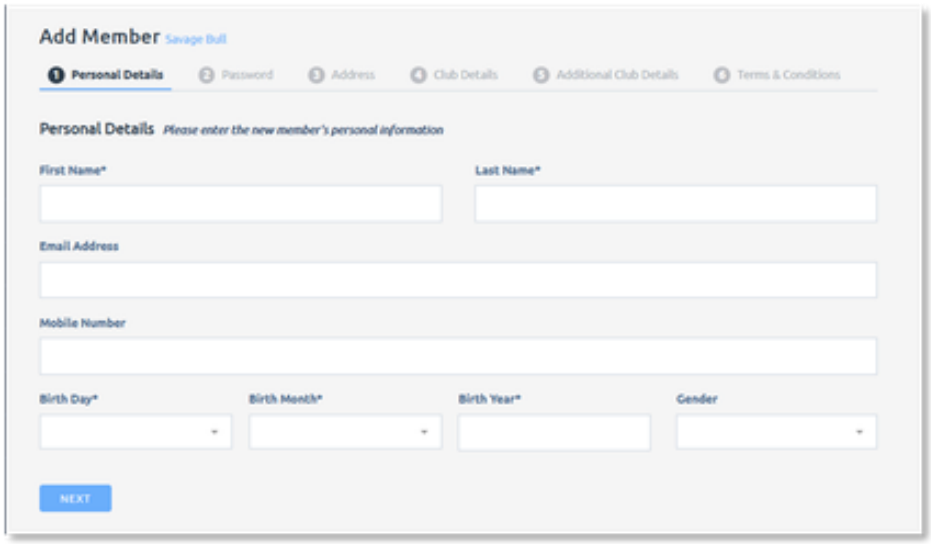
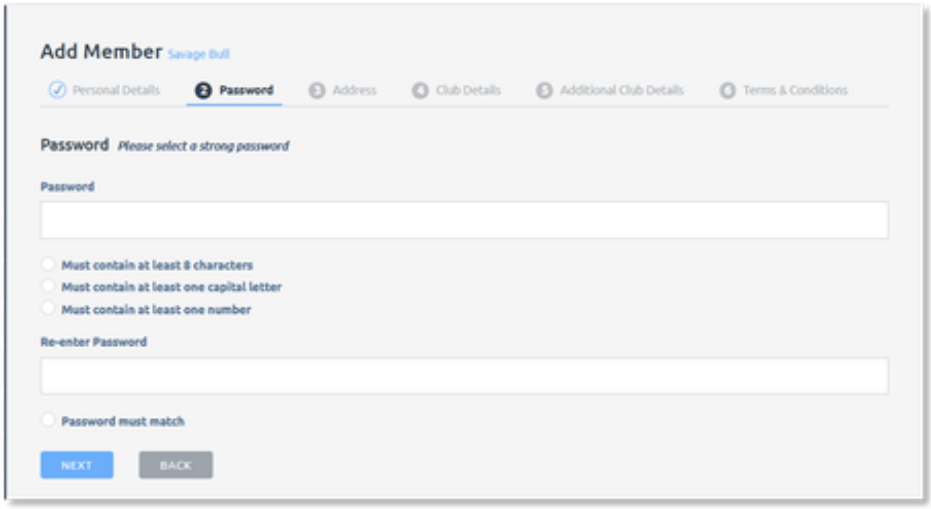
In the membership section of BowlsLink you will be able to find all information related to members of your club.
The membership section is further divided into members, groups & categories, certifications and transfers.

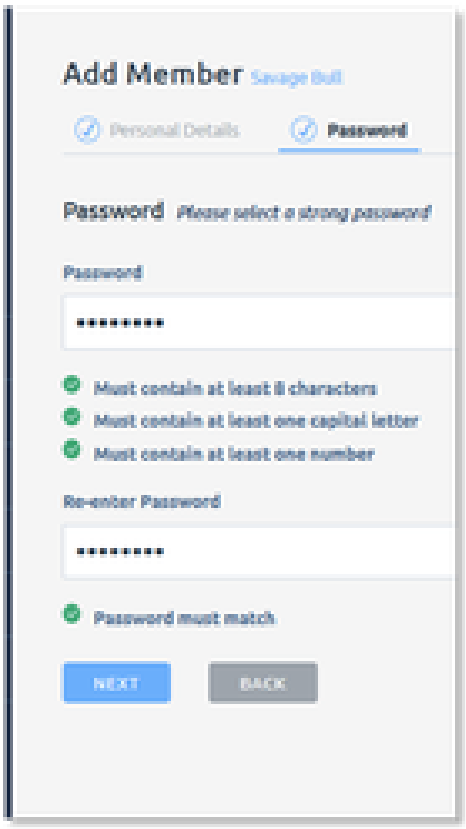
Members

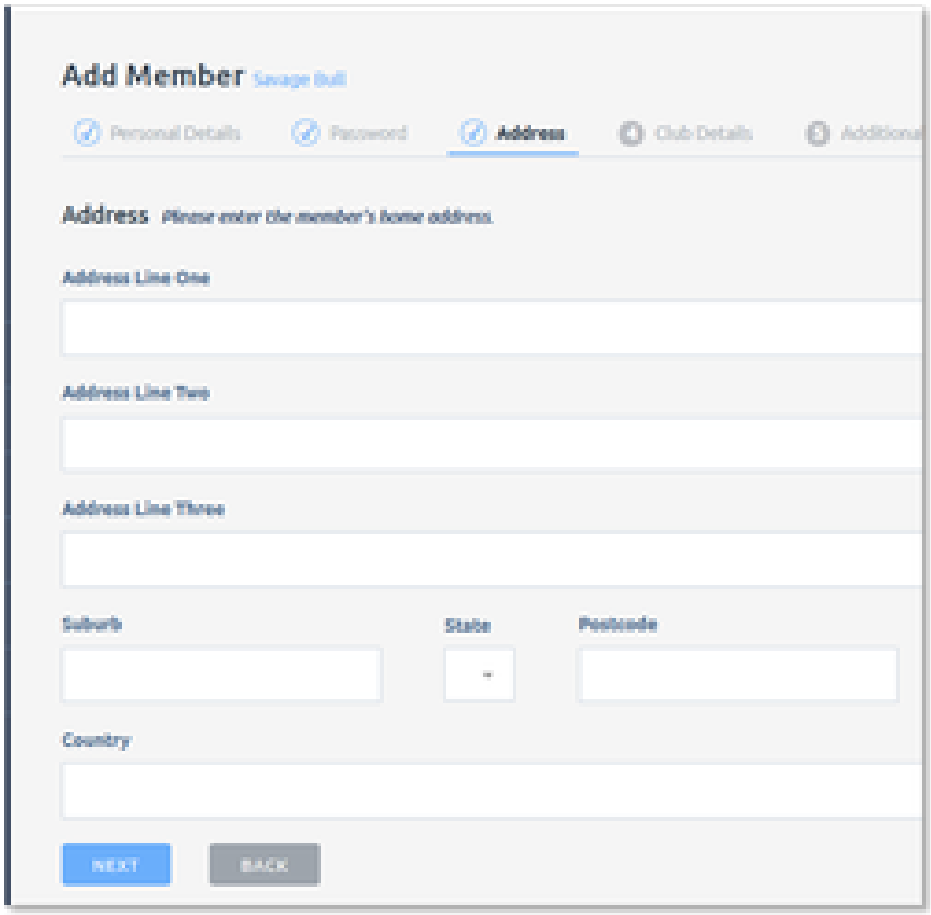
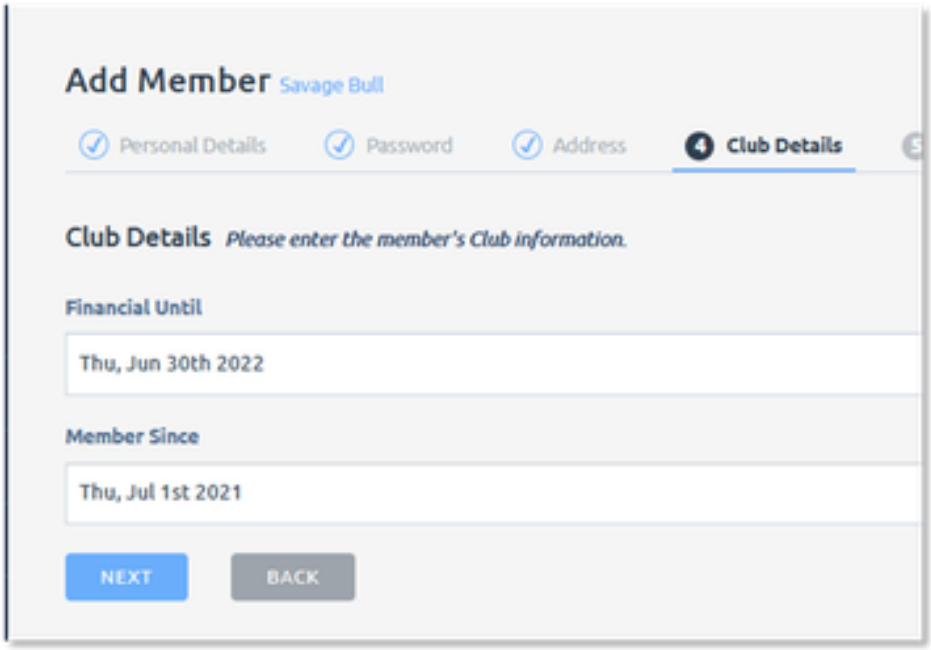
When you are in the members section you will be provided with a list of all the members currently in your club.
You will also be given the functionality to add new members.
The list is divided into three sections (tabs) - active, pending and archived.
For each member listed here you will be able to retrieve further information by clicking on their name.

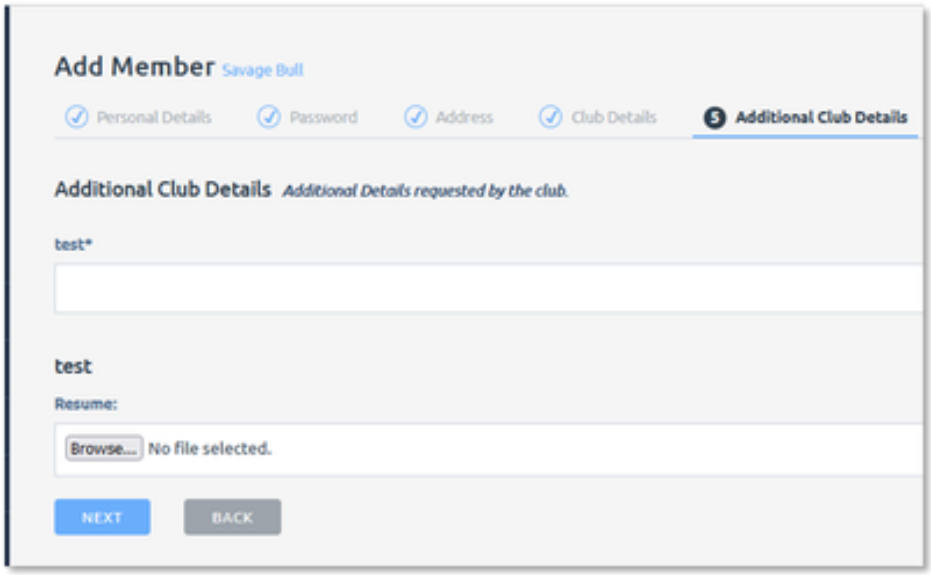
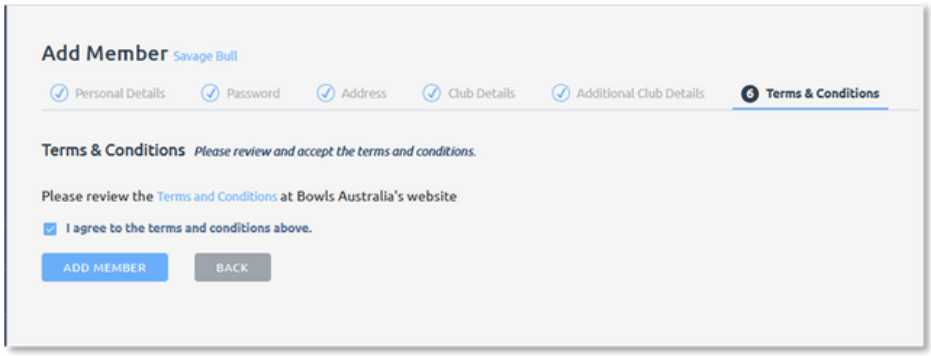
Adding a new member

You can add a new member using the add member button on the top right.	
Select the New Member option	

You will be asked to provide information on a number of screens. The first asks for First Name Last Name Email Address Mobile Number DOB These details are used to sup login access to the system, emails and mobile numbers must be unique.	
You will be asked to set a password. This password should be reset the first-time members log in. Password must: Have 8 characters Contain a capital Contain a number Once they match you can continue.	

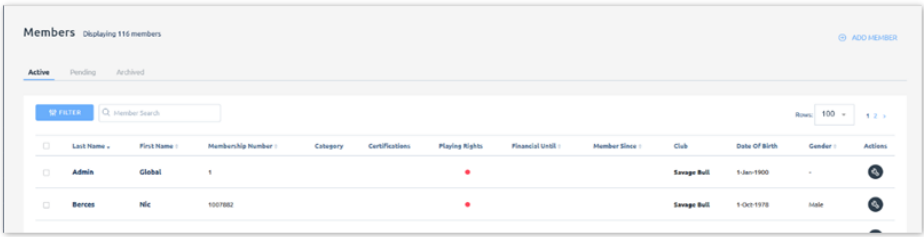
When the passwords match you will get the green lights	

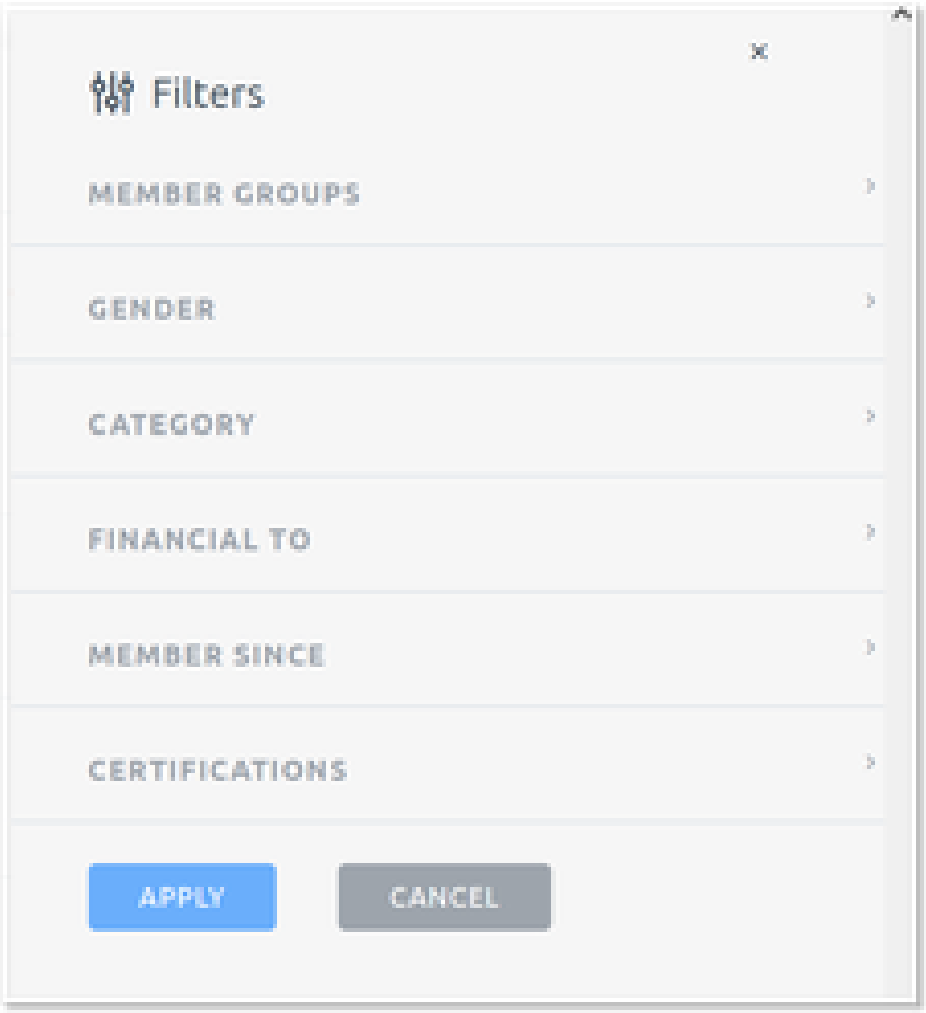
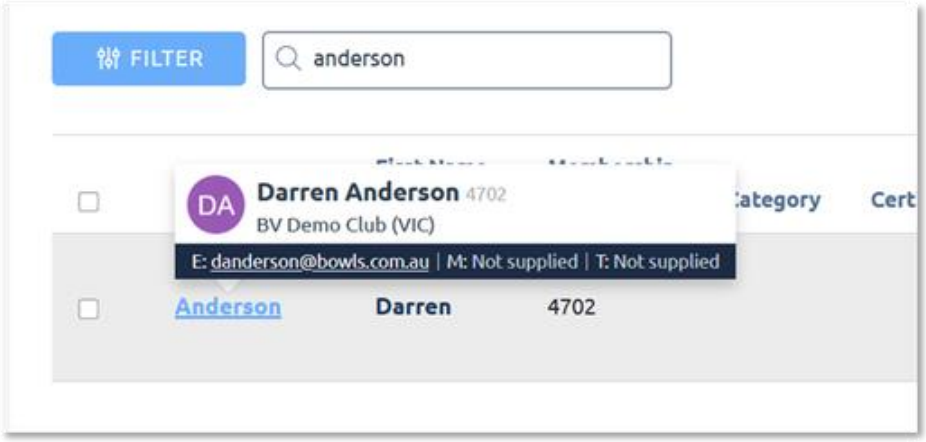
Next add the members address This should include: Address Suburb State Postcode Country	
The Club Details will allow you to set when the member is financial to and when they joined your club.	

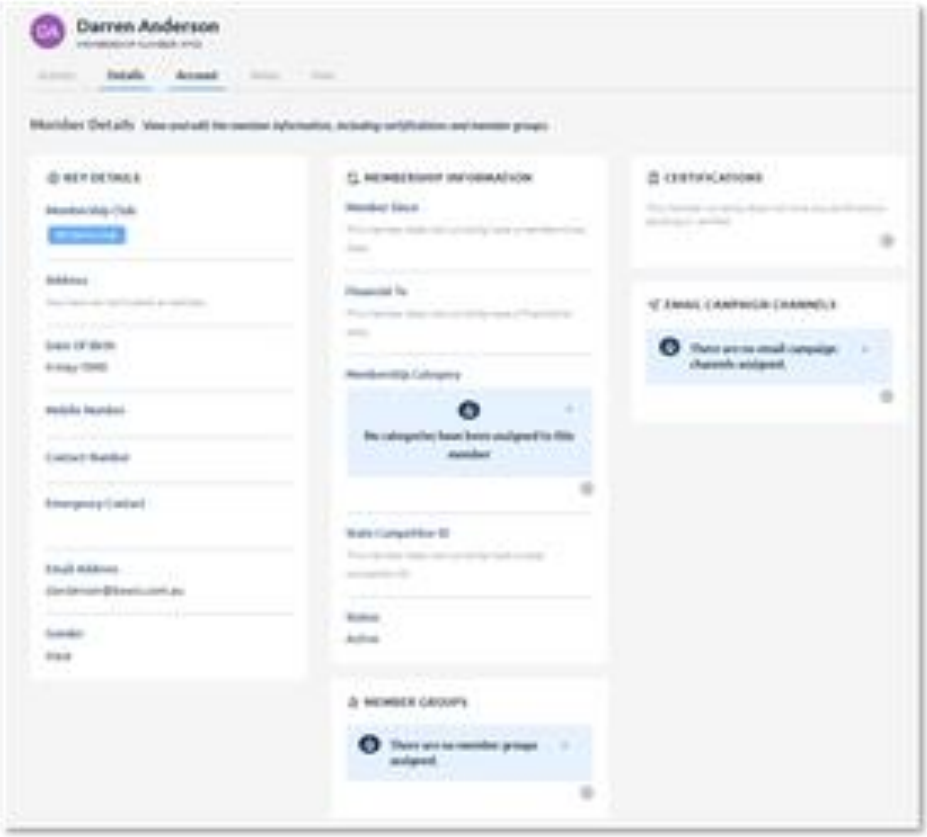
Additional Club details, are where you can enter any additional questions the club has on the system	
The Terms and conditions are saying that you have the members permission to put their details into the system	

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:

The initial screen will give you an overview of your active membership You will be able to see: Last name First name Membership Number (NIN) Category Certifications Playing rights indicator Financial until date Member Since Date Club DOB Gender On the far right is an actions button, that allows you to perform some actions on the member.	

You can use the filter button to filter members by: Member groups Gender Category Financial Date Member since date Certifications	
You can also use thee search function to find specific members.	
Hovering the mouse over a name will provide a box with contact information.	

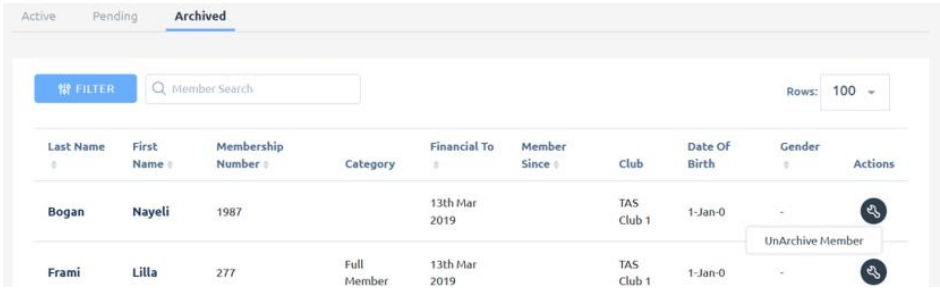
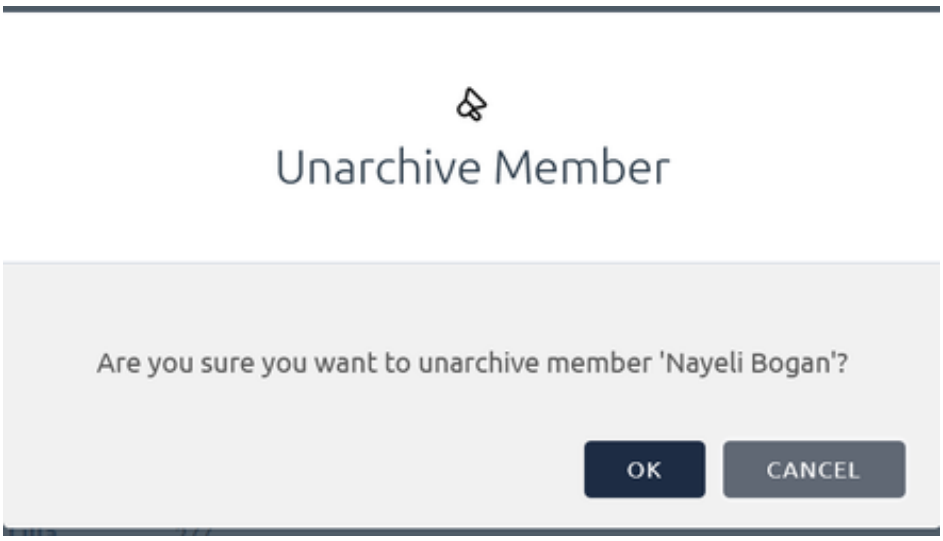
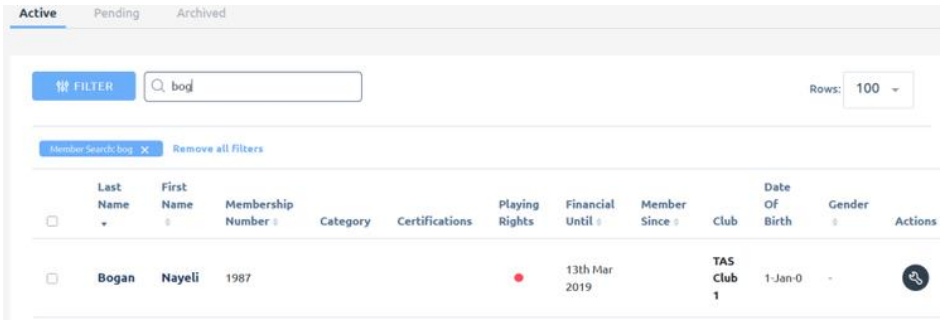
Clicking on a name will provide you with a detailed screen of the members information This is broken into: Key details Membership information Member groups Certifications Email campaign channels	

1. **Archived Members**
   2. 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.
      Archive is where all deceased and previous members of the club are stored.
      The similar functions are:
2. You will be able to click onto the club members' name to retrieve additional information about this member.
3. You will be able to sort the list of members differently by clicking on the different column headers.
4. You will be able to search for a particular member by name.
5. 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)

You will be able to perform additional actions for individual members. Additional actions are:

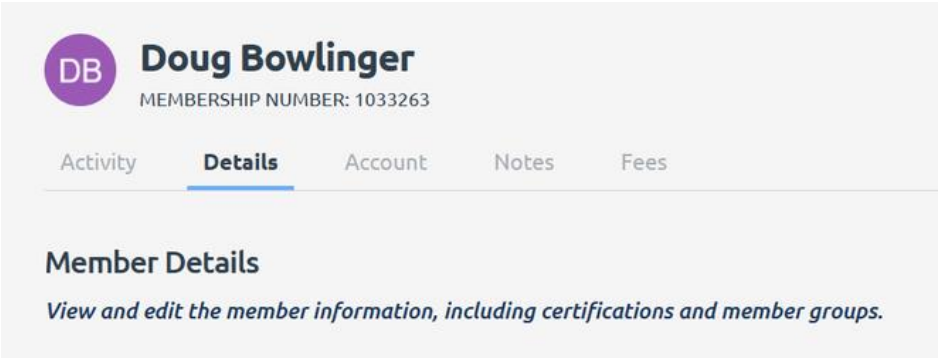
1.

1. UnArchive Member - You will be able to unarchive the selected member and make them an active member of the club again.

Use the actions button on the right to select the unarchive the member.	
You will be prompted to ensure the action you are doing is the one you want.	
Once it has been completed the member will appear in your active members list.	

2. Member - Detailed View

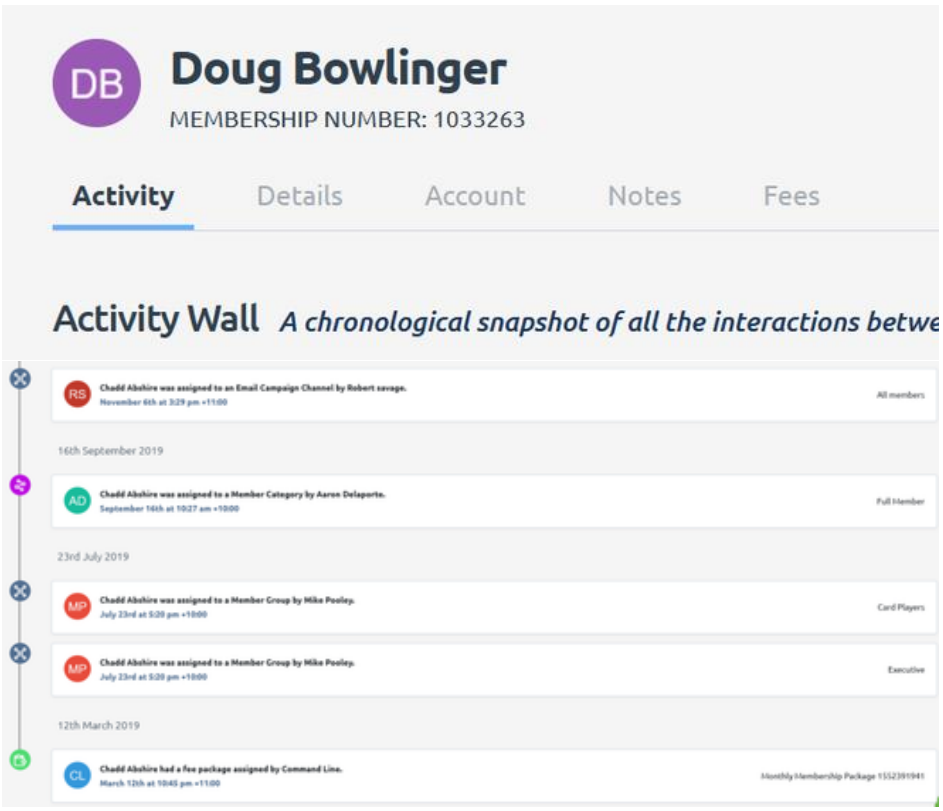
3. In the detailed view of a member you will be able to retrieve additional information about the member as well as being able to perform additional administrative actions.

The detailed member profile is divided into five sections (tabs) - Activity, Details, Account, Notes and Fees.	

4.

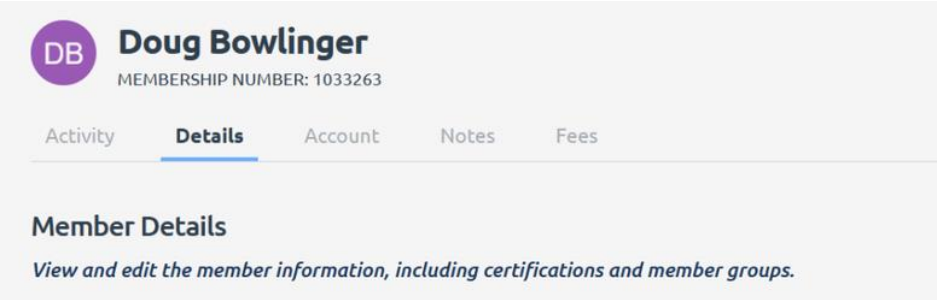
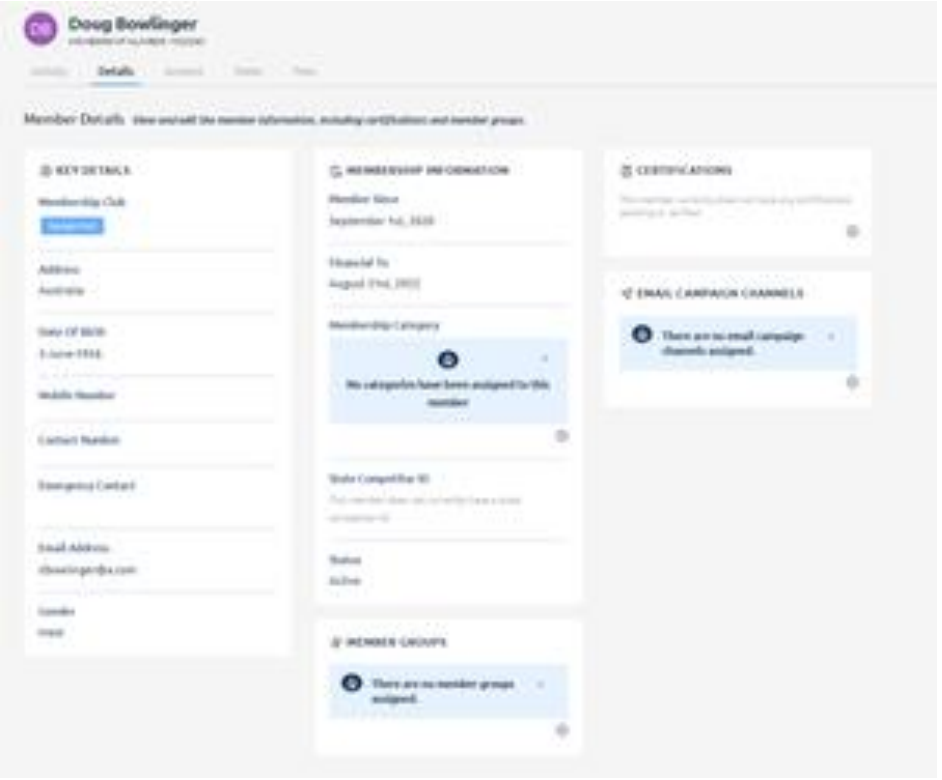
This is the same for active, pending and archived members.

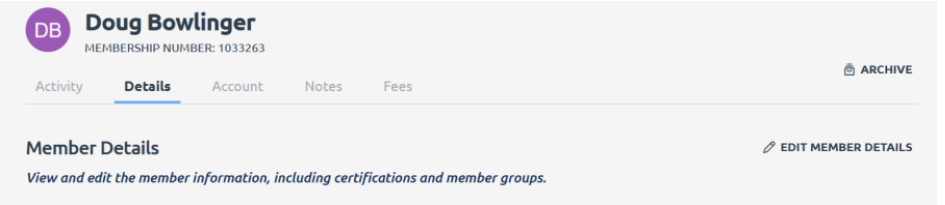
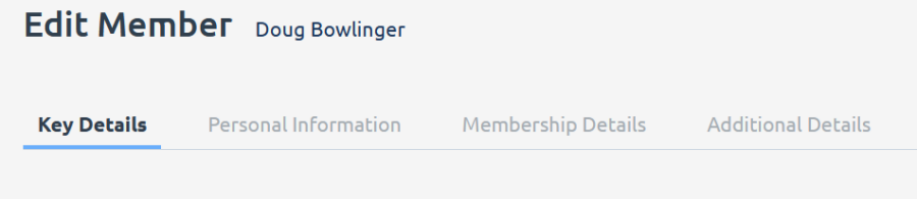
5. **Activity**

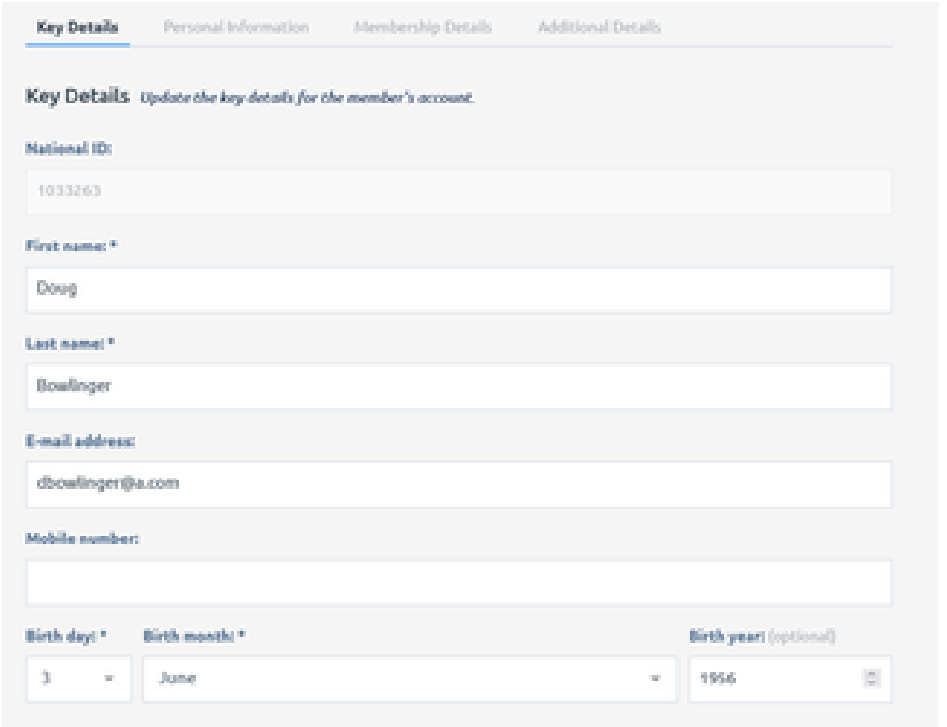
The first tab is the **Activity tab** where you will be able to see any activity against a members' profile.	

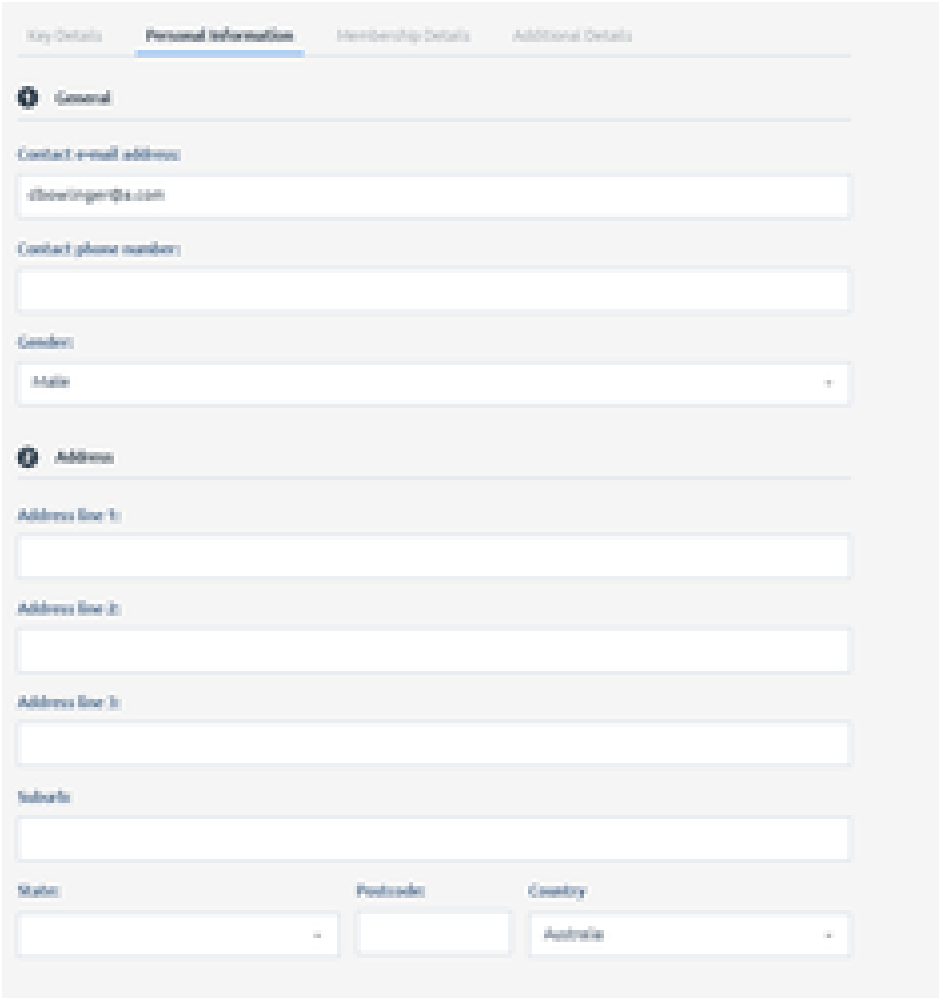
6. **Details**

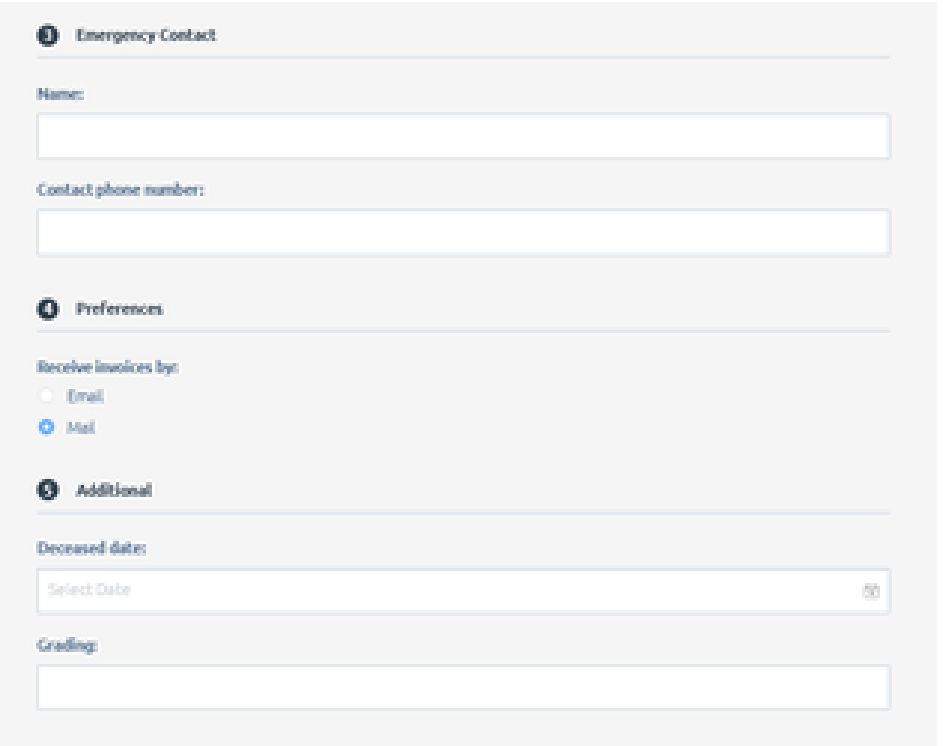
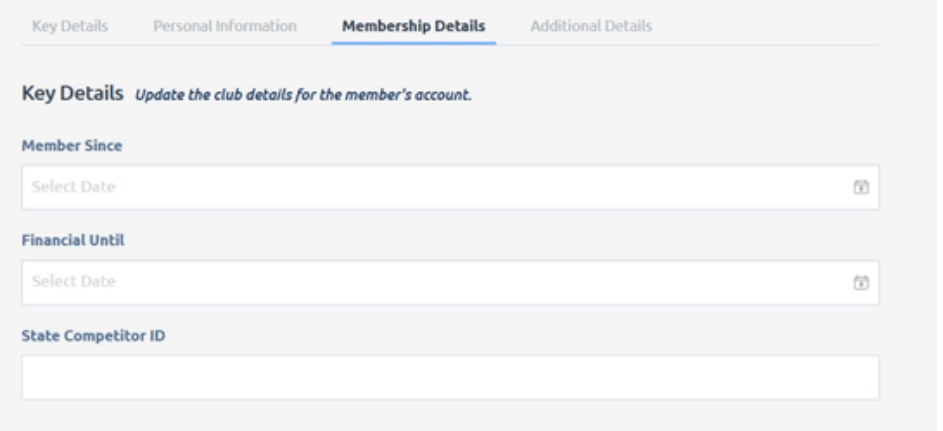
7. The details tab is where you will find in depth information about the member, it is also whee you can edit member information.

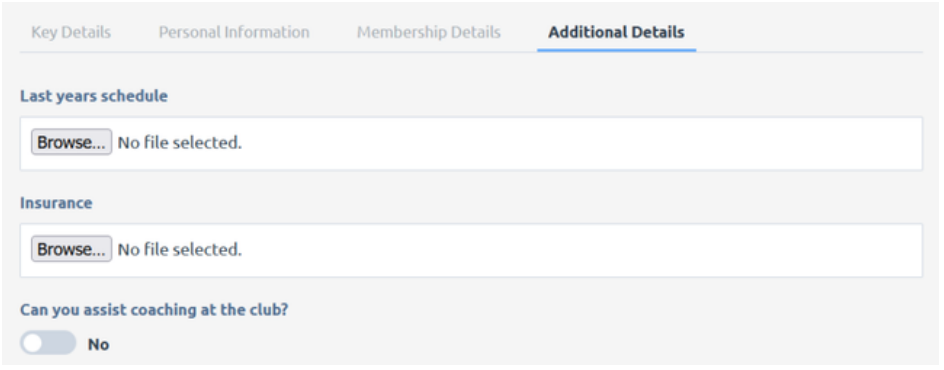
The second tab is the **Details tab** where you will find most member information.	
This page is broken into sections for navigation purposes. These sections are: Key Details Membership Information Member Groups Certifications Email Groups We will look at each section in detail.	

There is also an Edit Member Details on the right-hand side. Clicking this allows you to change members details.	
Editing Member Details is broken into four tabs: Key Details Personal Information Membership Details Additional Details	

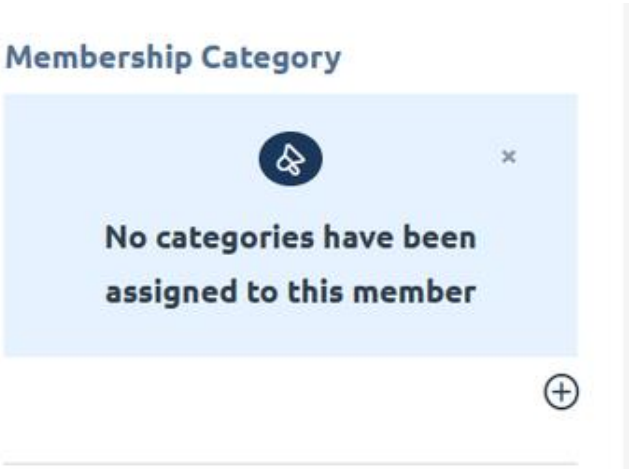
Key Details contains essential information for members. These details are used for login details to the system and id verification and must be unique within the system. E.g. two people cannot share and email or mobile number in this section.	

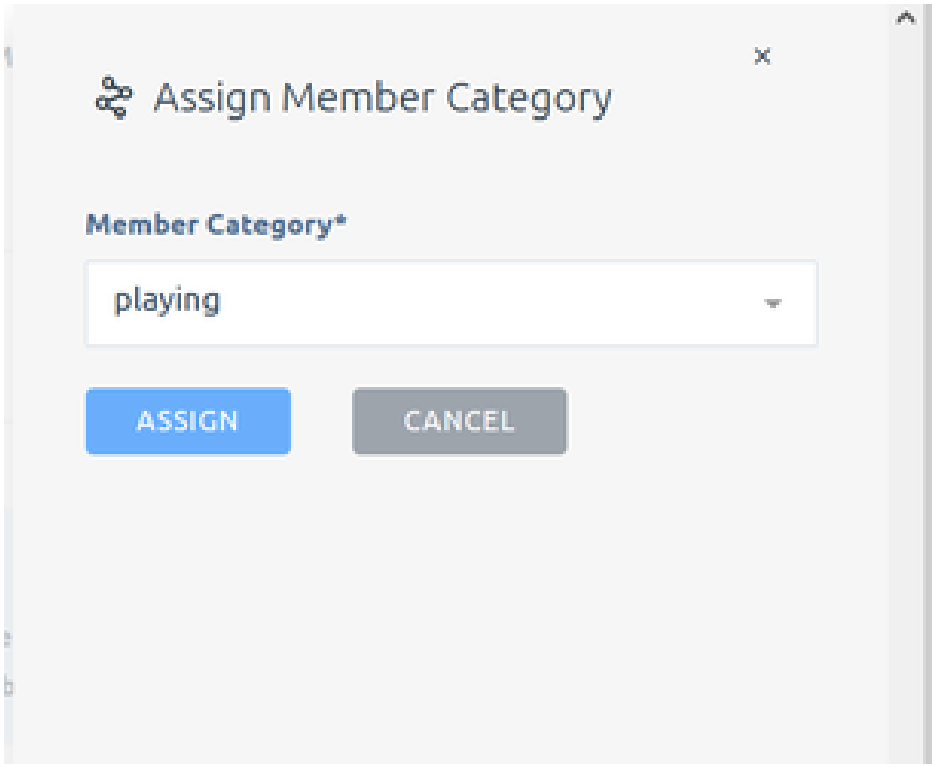
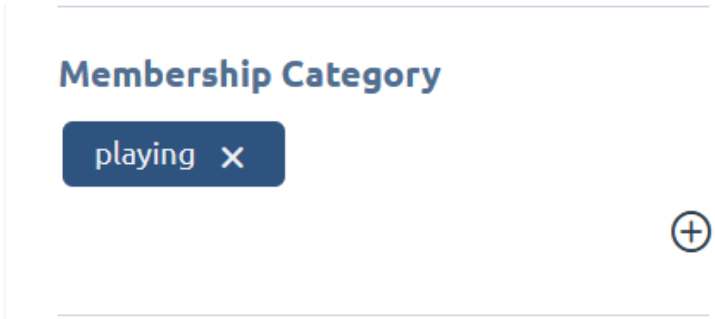
Personal information tab contains additional details about members that are not used for ID purposes. These fields do not need to be unique, and members can use the same email/phone numbers here. The first two section include; Email Phone number Gender Address	

The remain sections include: Emergency contact details Email invoice options Deceased date (admin only) And Grading (NSW Only)	
Membership Details hold information regarding membership to the club. This includes: Member since date Financial until date State Competitor ID (where used)	

Membership Details contains any club specific information required from members. This section can be blank	

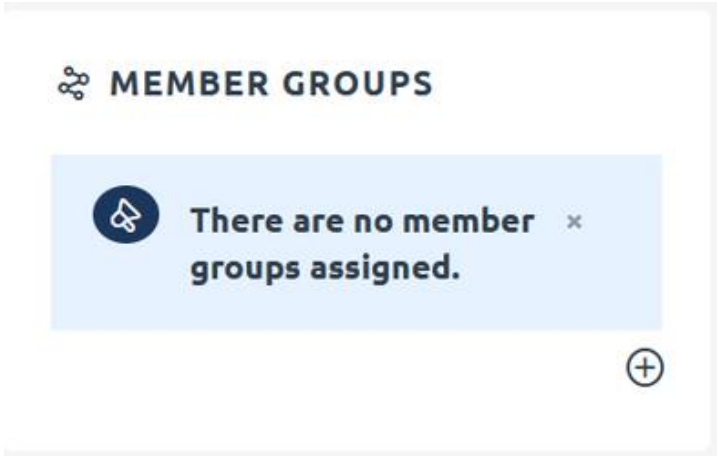
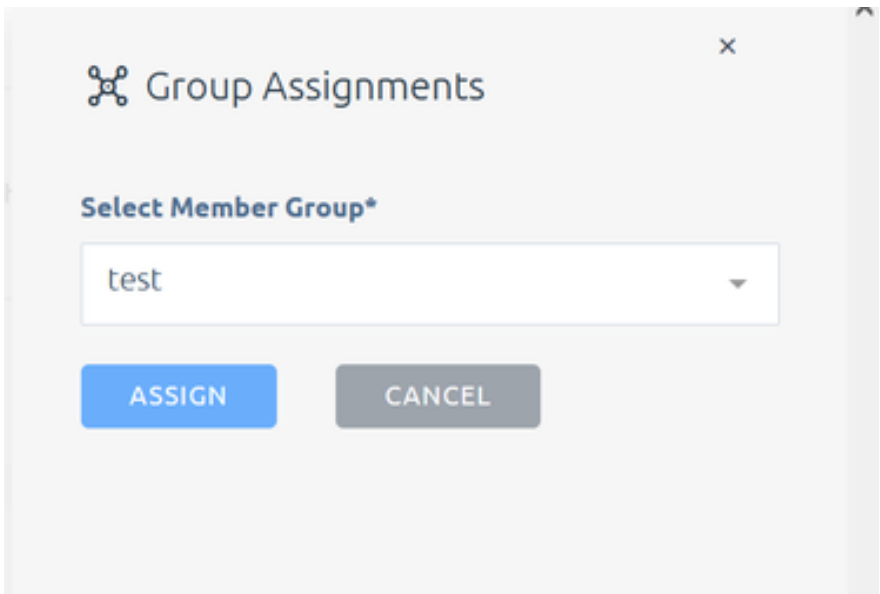
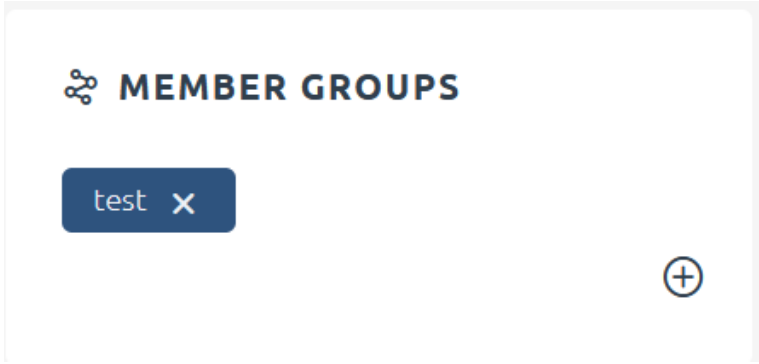
8. **Categories**
9. Categories are a very important part of BowlsLink. Each category is associated with playing rights. Members who have categories that have playing rights will be able to enter competitions where playing rights are required.

Editing Categories can be done from the details page. Categories can be added using the small plus in the Membership category box	

This will open a side bar, where you can select the appropriate category from the list.	
Removing a category can be done by clicking the small cross next to the category on the details page.	

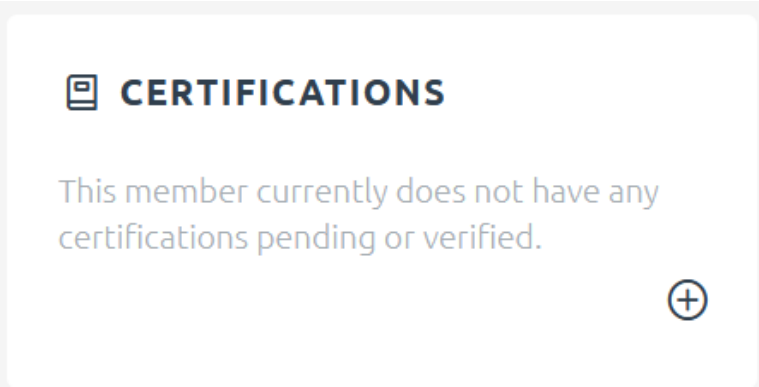
10. Groups

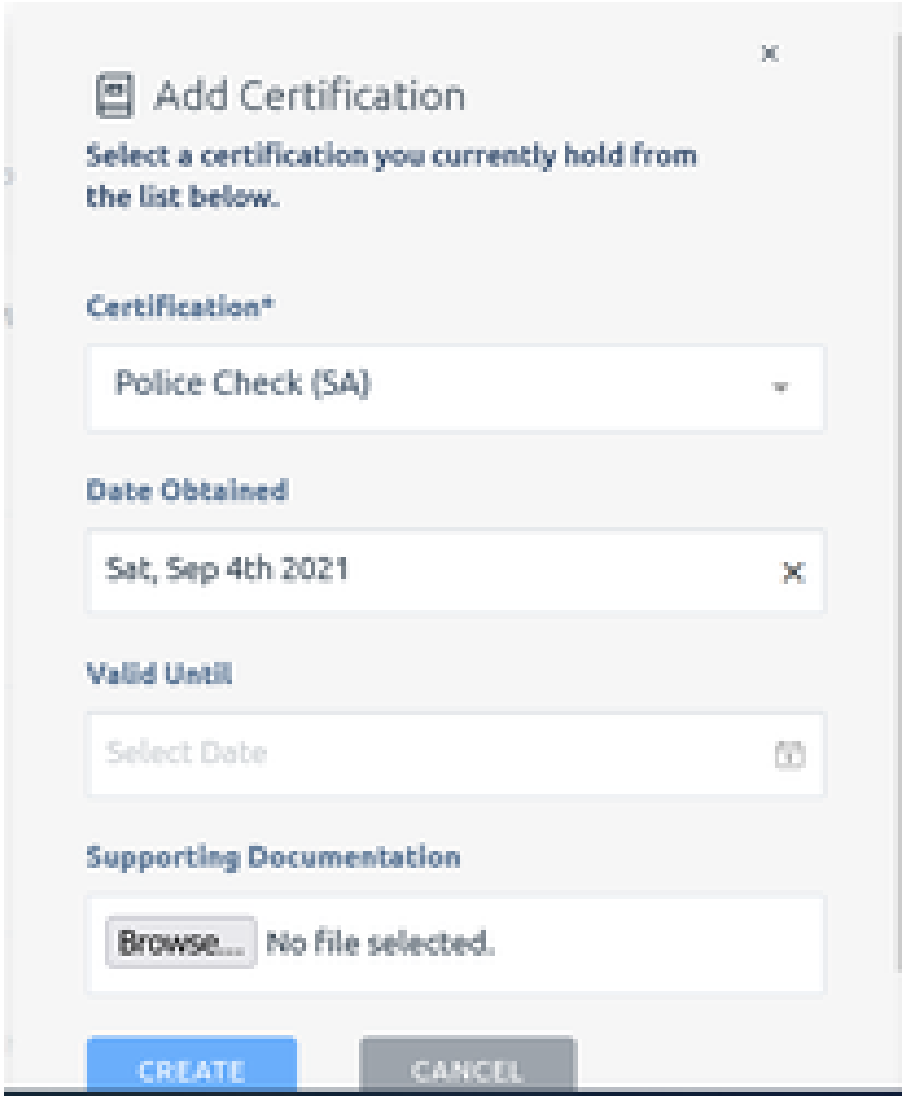
11. Groups are another important part of BowlsLink. Groups can either be **Email Campaign Channels,** or not. If they are setup as an email channel then you will be able to use the Email Campaigns feature of BowlsLink to email from the system to members.

Editing Groups can be done from the details page. Groups can be added using the small plus in the Member groups box	
This will open a side bar, where you can select the appropriate group from the list.	
Removing a group can be done by clicking the small cross next to the group on the details page.	

12. Certifications

13. Certifications are in integral part of BowlsLink as they are used to indicate everything from Responsible Service of Alcohol to International Technical Officials. Certificates can be added on the details page of a member.

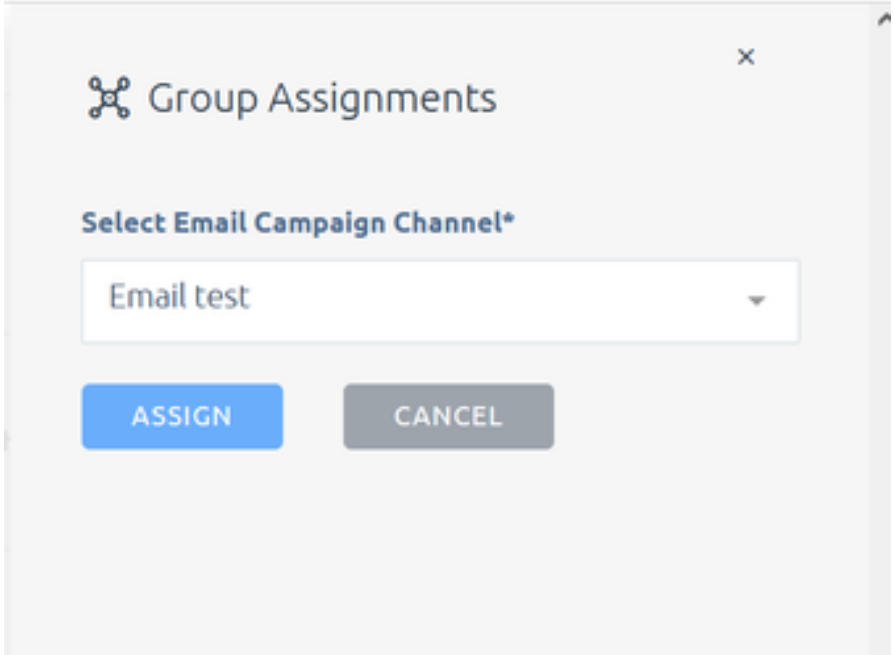
Editing Certifications can be done from the details page. Certifications can be added using the small plus in the Membership certifications box	

This will open a side bar, where you can select the appropriate certification from the list. The list is large, if you start typing the name the list will reduce the choices.	

Members may have more than one certification. When added certification will have a grey light meaning they are pending. They will all appear as having a green light, when the certificate has been approved. Approval may need to be done by an Admin at another level.	

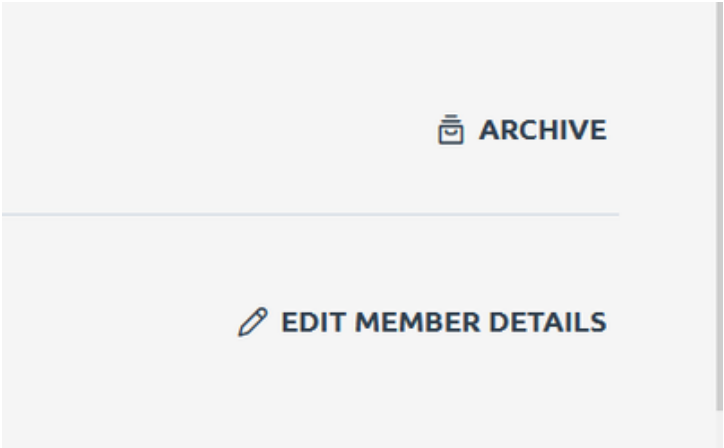
14. Email Campaign Channels

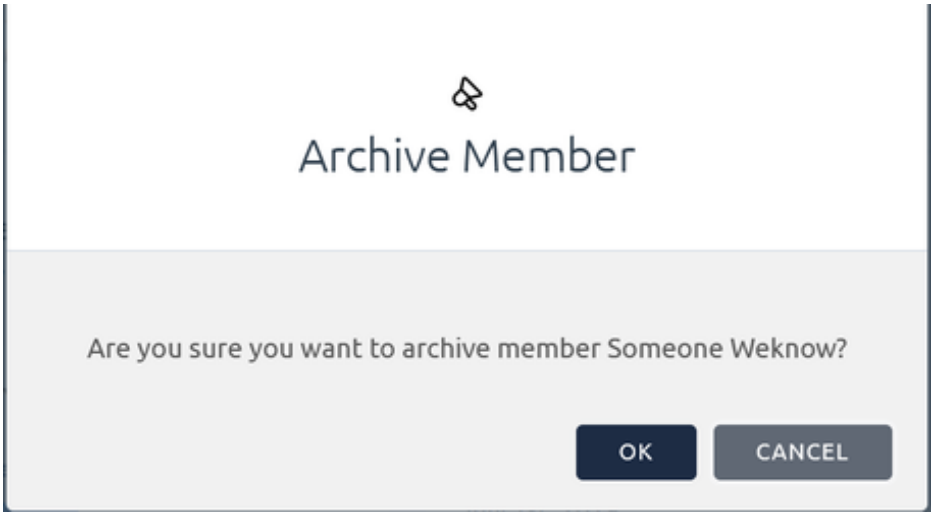
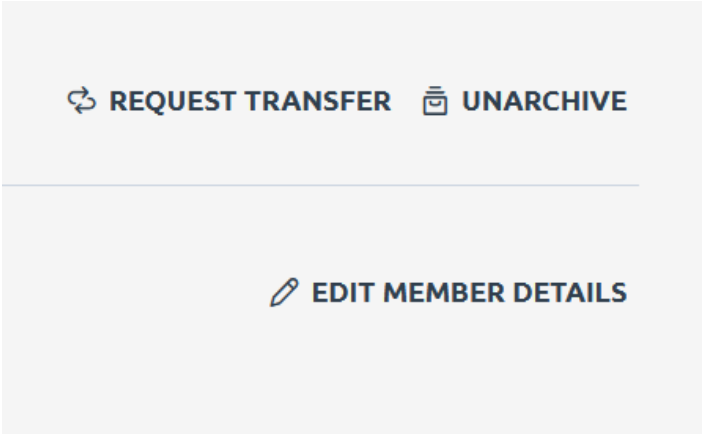
15. Email Campaigns are used similar to groups, however these channels are updated to an email campaign manager every day, so by adding or removing people to these channels enable members to receive important emails from administrators. Members can remove themselves or add themselves at any point to email channels.

To add members to an email channel you can use the plus sing in the bottom right of the email campaign channel box.	
This will open a side bar, where you can select the appropriate campaign channel from the list. The list is large, if you start typing the name the list will reduce the choices.	

Members may belong to more than one Email Campaign channel. Members will be able to remove themselves from these channels. To remove members from particular channels you can click the cross next to the channel name,	

16. **Archive**
17. **The archive function can be used when members leave the club. Putting members in Archive will remove them from and email campaigns and member groups. They will also be removed from the active listing and put under the archive listing.**

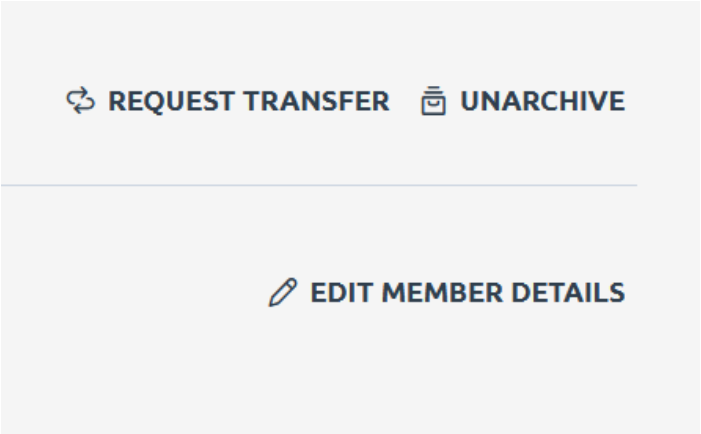
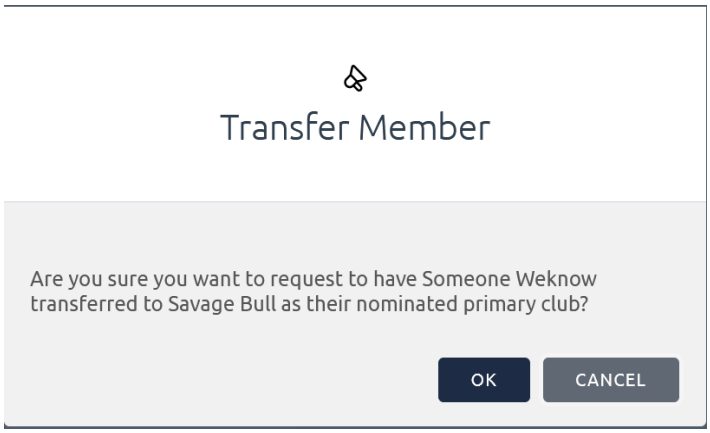
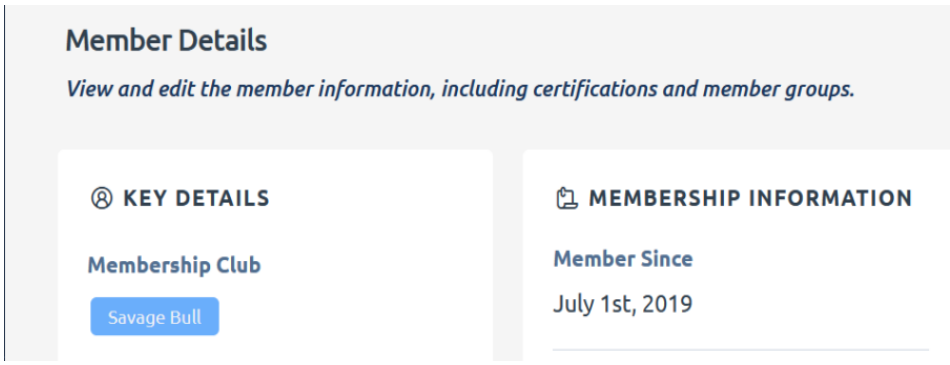
To archive a member, use the archive function located about the edit member details function.	

You will be presented a confirmation box to ensure you want to archive the member.	
Once the member is archived they will only appear in the archive list. **Members can be unarchived in a similar way from the archive list using the unarchive function.** **When players are unarchived they will return to the active list with no groups or categories.**	

18. Request Transfer

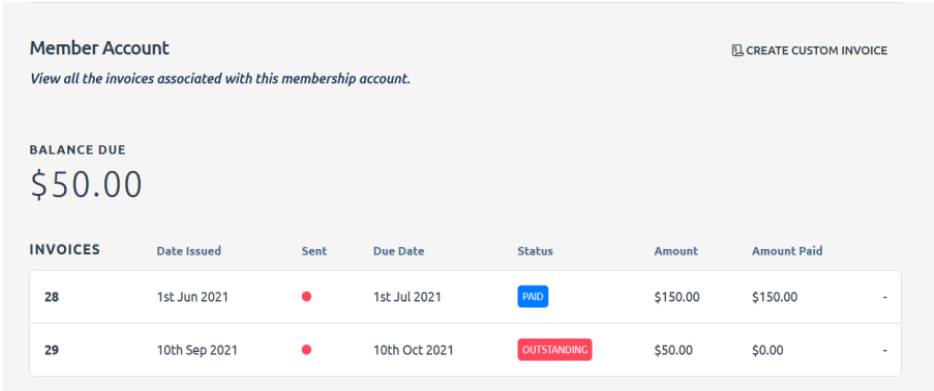
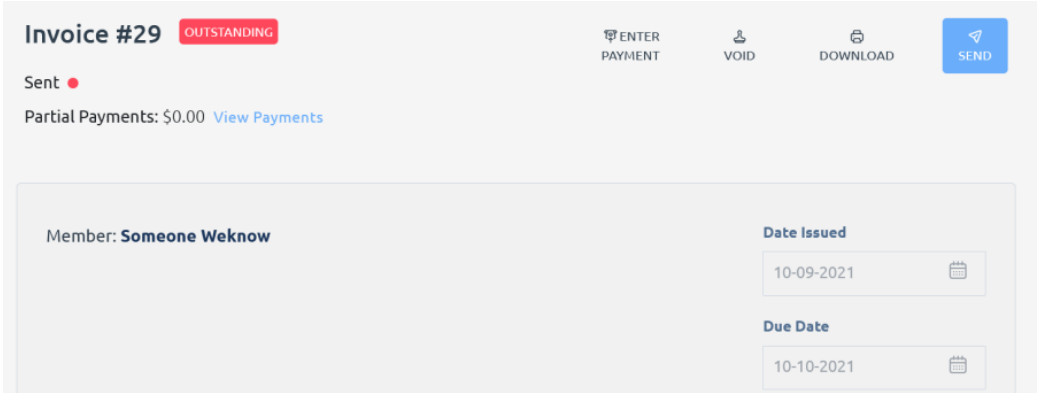
19. The request transfer option will appear when a member is archived at your club, or when they are a duel member, and your club is not the primary or declared

club.
Using this function will start a transfer process which will initiate a switch of primary club from one to the other. This may require approval at STA level.

When the member is archived if they are returning to the club you can select the Request transfer function.	
This will open a dialogue box asking to confirm the transfer and make your club the primary club.	
When the member is unarchived, your club will become the primary club for the member.	

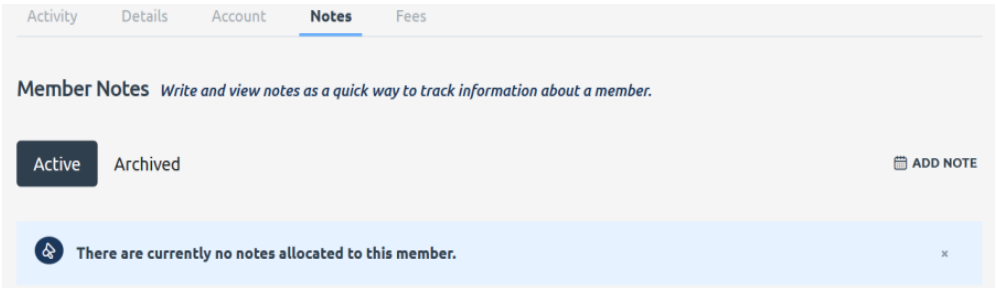
20. Account

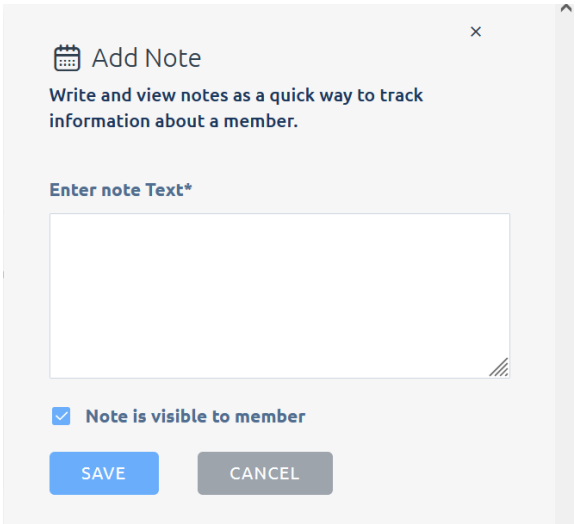
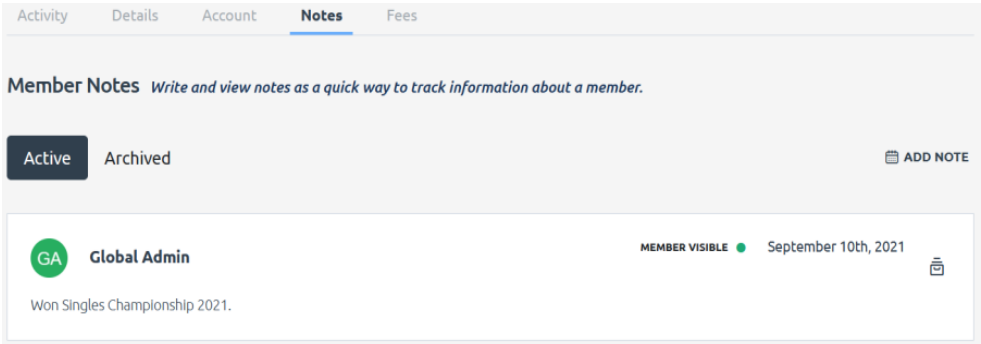
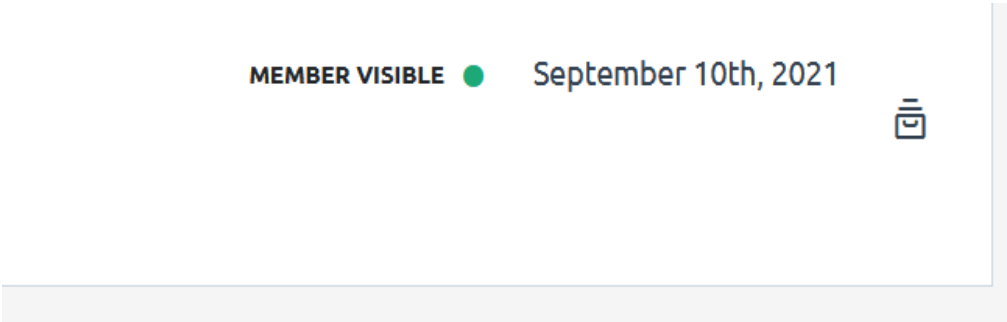
21. The third tab is the Account tab where you will be able to view all the invoices associated to this particular member. You will be able to find invoice information and perform the following actions:

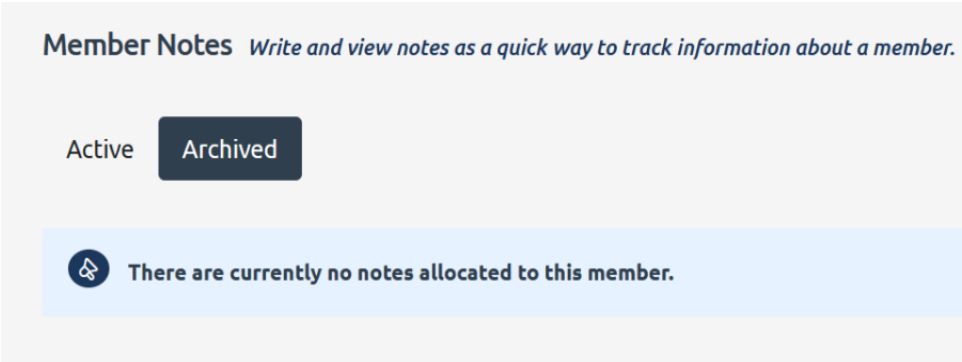
The account tab will show you a history of invoices issued through the system. It will also show any outstanding balances.	
Clicking the invoice will give you more options. Including entering payments, voiding the invoice, downloading to print or sending via email.	

22. Notes

23. 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:

Notes can be added using the add note function in the top right.	

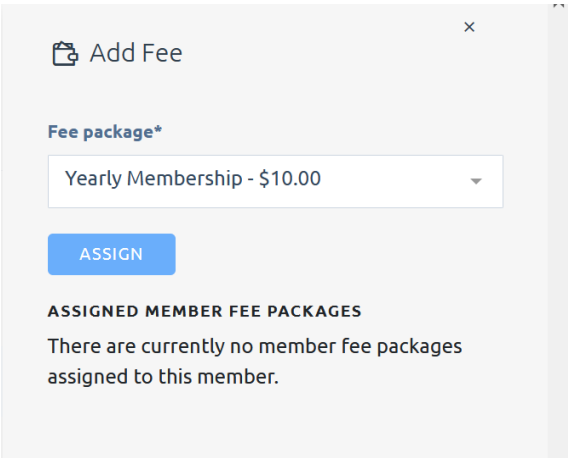
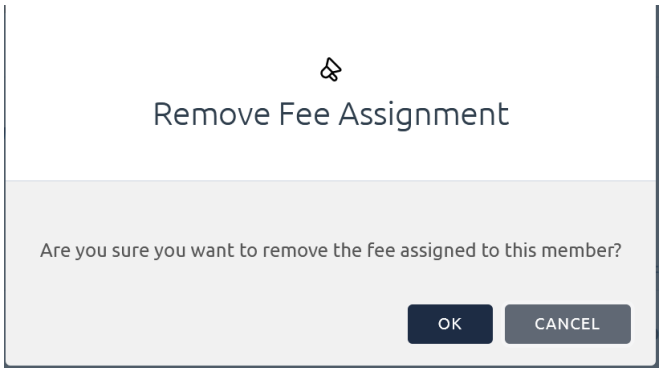
This will open a dialogue box, where you can put the note. You can also select if the note is visible to the member or not.	
Once the note has been added it will appear in the list.	
Notes can be archived but **not deleted.** To archive use the archive function on the right of the note.	

Archived notes can still be viewed by changing the notes view from active to archived.	

24. Fees

25. 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 Assign and Remove fees.

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)	

If you need to add any additional fees that are not already assigned to the member use the Assign Fee function. This will open a side window, select the fee and assign.	
To remove a package use the minus sign on the right of the package.	
This will give you a confirmation window, click OK and the fee will be removed.	

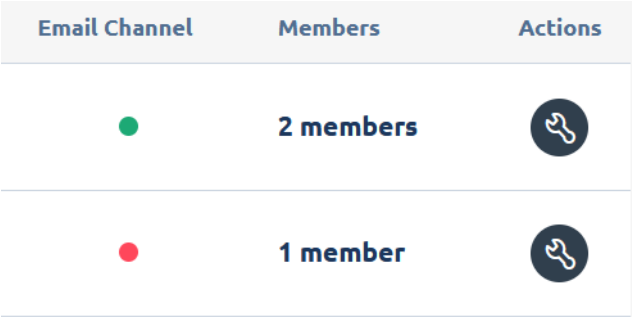
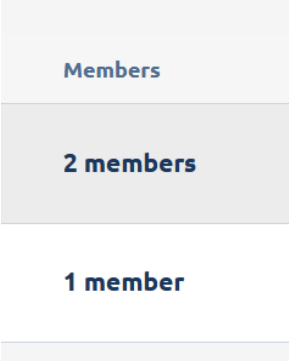
26. Groups & Categories

27.

Groups and Categories are similar but serve different purposes within the system. Groups will provide lists and email channels for communication with members. Categories allocate playing rights within the system which can be used to exclude members from entry to competitions.

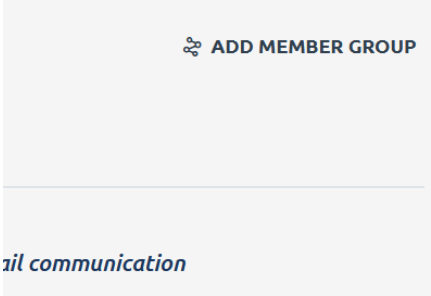
28. Member Groups Overview

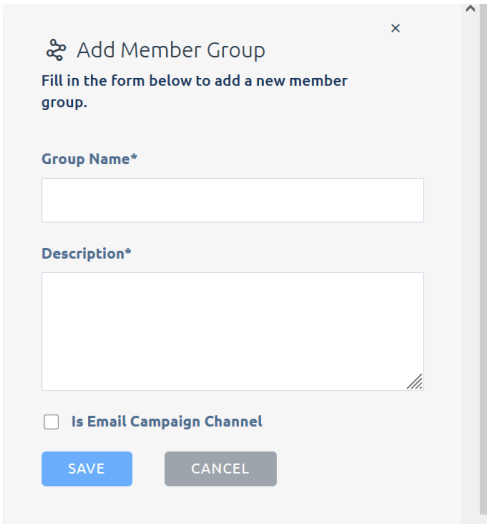
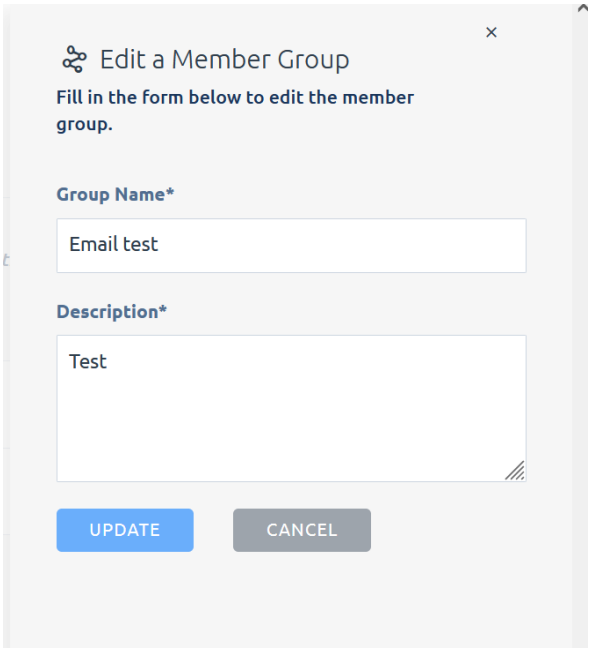
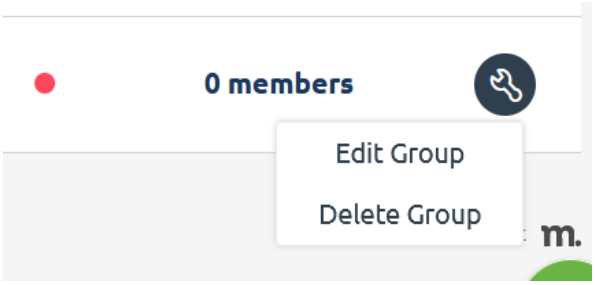
29. In the **member groups tab** of your list you will be able to see all member groups that have already been created. You will also be given an overview of some of the groups' details.

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 Email Channel column will indicate if you can send emails to this group directly from the system. A green light indicates you can email them, a red light indicates you can't.	
By Clicking on the Members link you can see who is in the group. In this case you would click on the 2 members and be shown a list of those 2 members.	

30. Members Groups Add New

31. Adding a new members group is fairly simple, it is best to ensure that there is a definitive reason for adding a new group before adding it. You will also need to decide if you want to be able to send emails to the group from within BowlsLink.

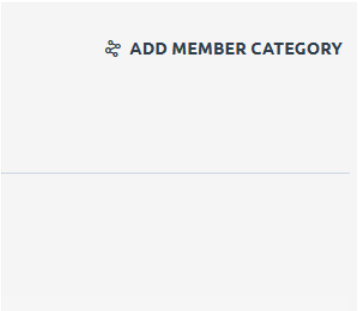
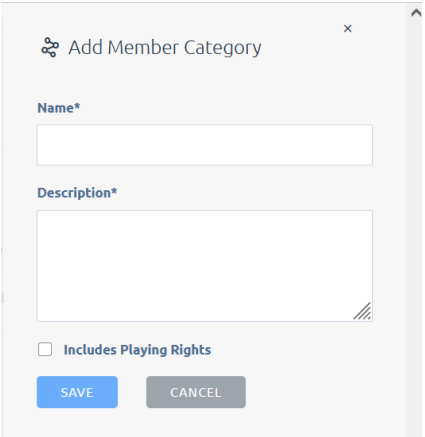
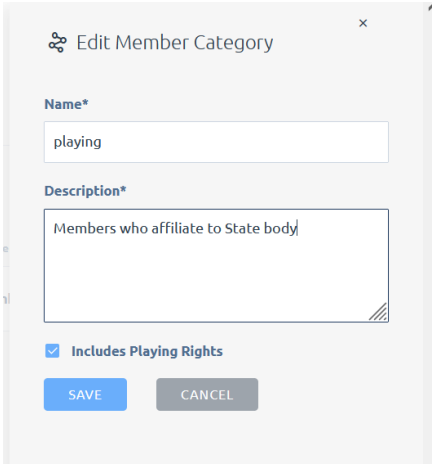
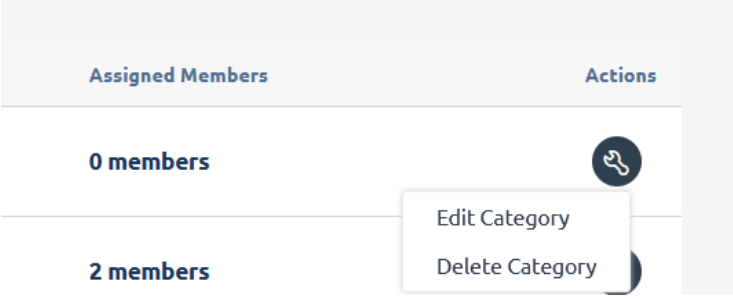
You will be able to add new member groups using the Add Members Group function.	

This will open a sliding panel. You will need to fill out A Group Name A Description And tick the box if you want to be able to email a group. **NB:** once you save group you **will not be able** to choose if it is an email channel or not. If you are in doubt it is safer to choose to be able to email the group.	
Once a group has been created you can edit a group, but only the title and description.	
You will only be able to delete a group if there are no members in it.	

32. Member Categories

33. In the **member categories tab** of your list you will be able to see all member categories that have already been created. Categories are able to give members **Playing Rights** which can be used to include or exclude members from

competitions. You will also be given an overview of some of the categories' details.

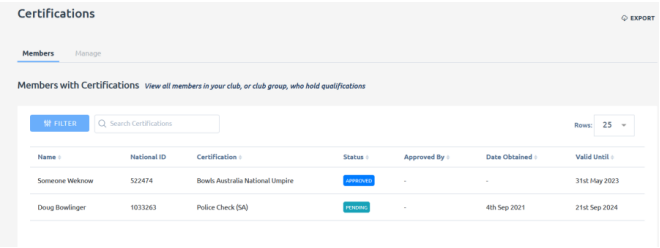
You will be able to add new member categories, using the new category function.	
This will open a sliding panel. You will need to fill out A Category Name A Description of the category And tick the box if you want to the category to have playing rights.	
Once a Category has been created you can edit a category, this includes adding or removing playing rights for the whole category.	
You will only be able to delete a group if there are no members in it.	

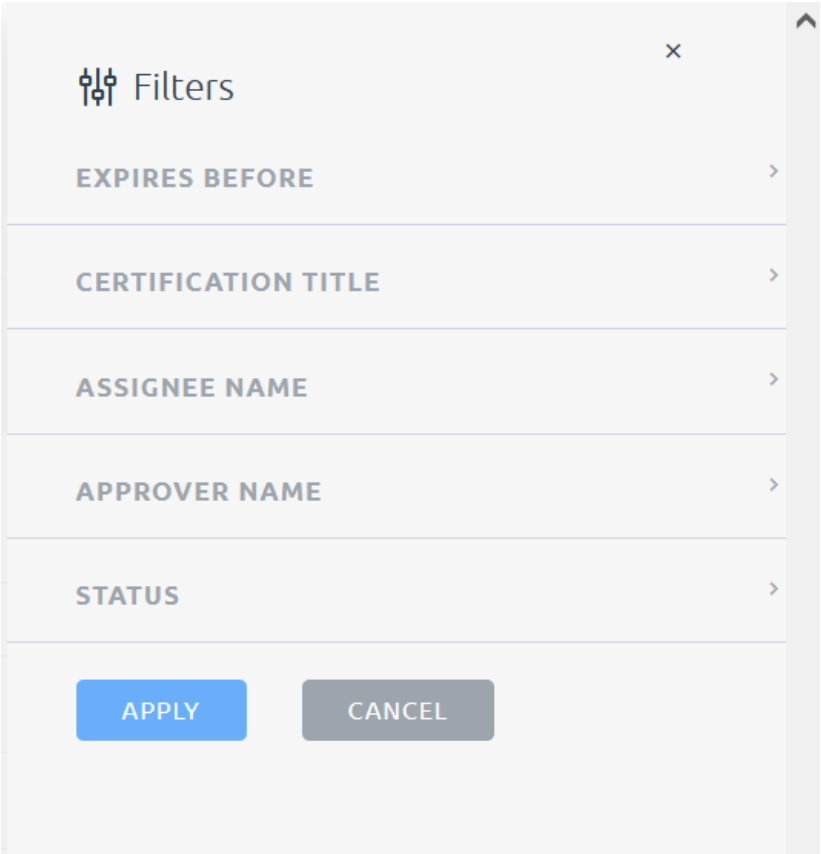
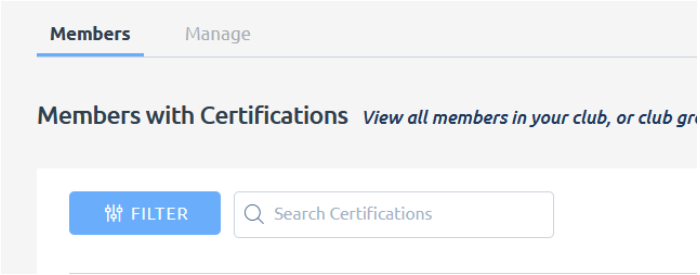
34. Certifications

35. Certifications can be used for a large number of certifications, this includes all Bowls Australia accreditations (coaching and officiating accreditations), as well as more club specific requirements such as RSA, and Gambling licences. Certification is divided into two sections (tabs) - members and manage.

36. Members

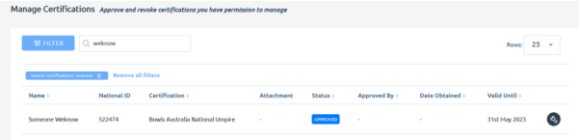
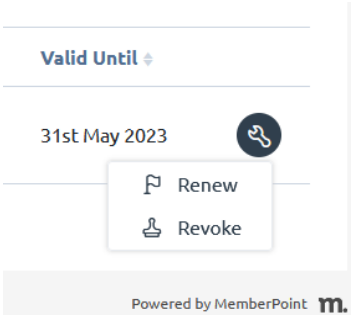
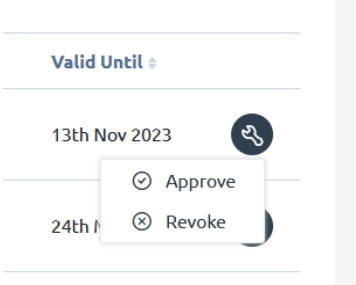
37. For each member listed here you will be able to retrieve their certification status, the validity of their certification and the certification type. You will be able to search for a particular certification by name. Certification status can be Approved (valid), Pending (awaiting approval), Expired (past date for renewal) or revoked.

The initial screen will display general information about members and their certifications including: Name National ID Certification Status Approver Date Obtained Date Valid until You can use these to sort the data with the exception of National ID.	

There is a filter button that will limit the visible certifications. You can filter by Expiry date Title Name Person who approved Status	
There is also a search function which allows you to do a text search on names and certification titles	

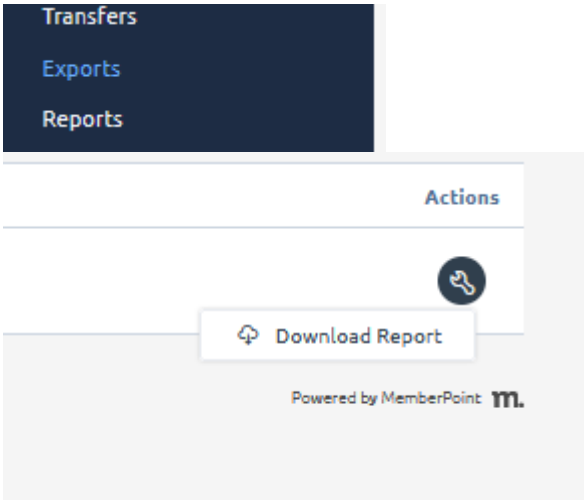
38. Manage

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

The initial screen will display general information about members and their certifications including: Name National ID Certification Status Approver Date Obtained Date Valid until You can use these to sort the data with the exception of National ID.	
If the certification is in Approved Status the you will have 2 options from the actions button on the right. **Renew** or Revoke	
If the certification is in Pending Status the you will have 2 options from the actions button on the right. **Approve** or **Revoke**	
If the certification is in revoked Status the you will not be able to do anything with it. If the members re-attain the certification a new one will need to be added.	

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

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 have been added and are available from the reports menu. Click the action icon to download a copy of the report for your club