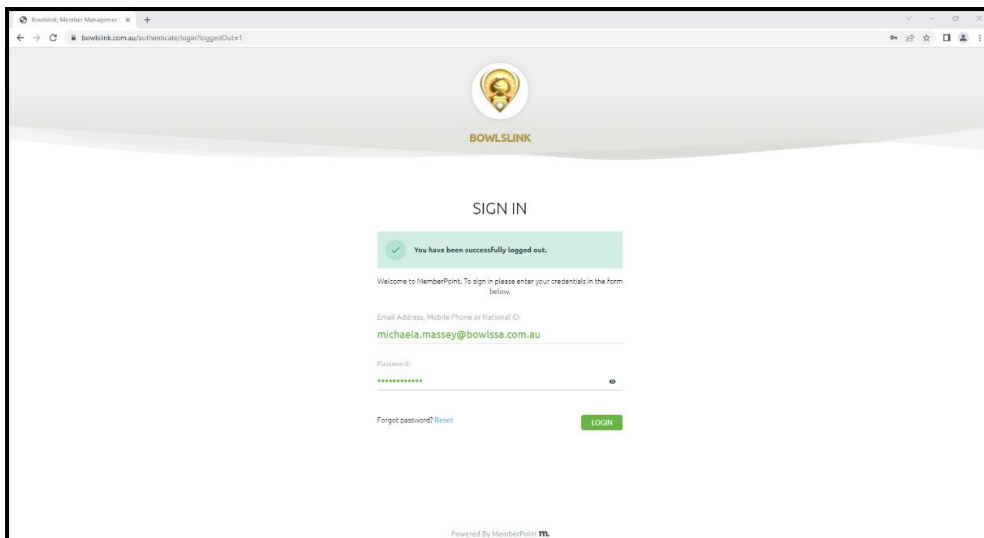
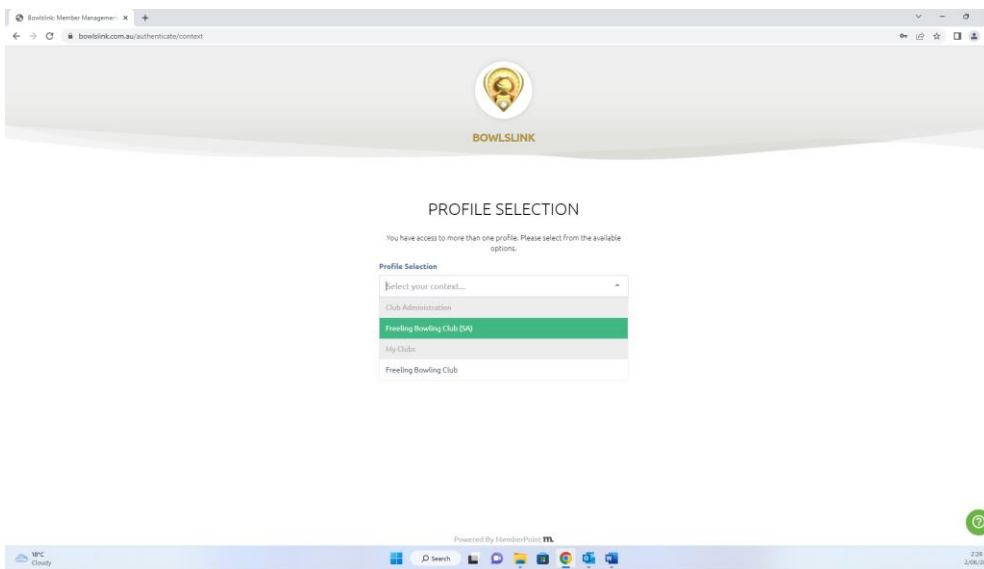


How to assign member categories to members

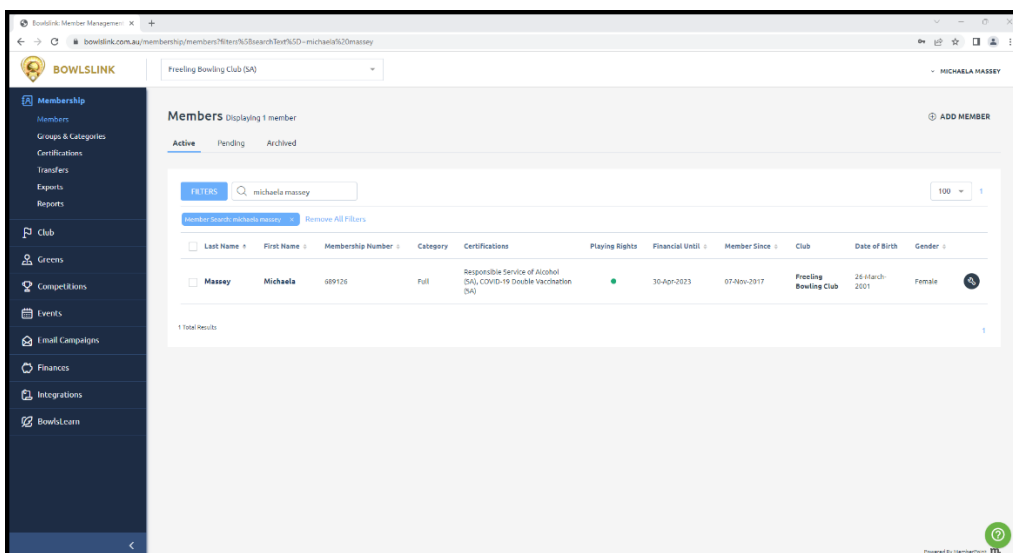
1. Log in with your email and password



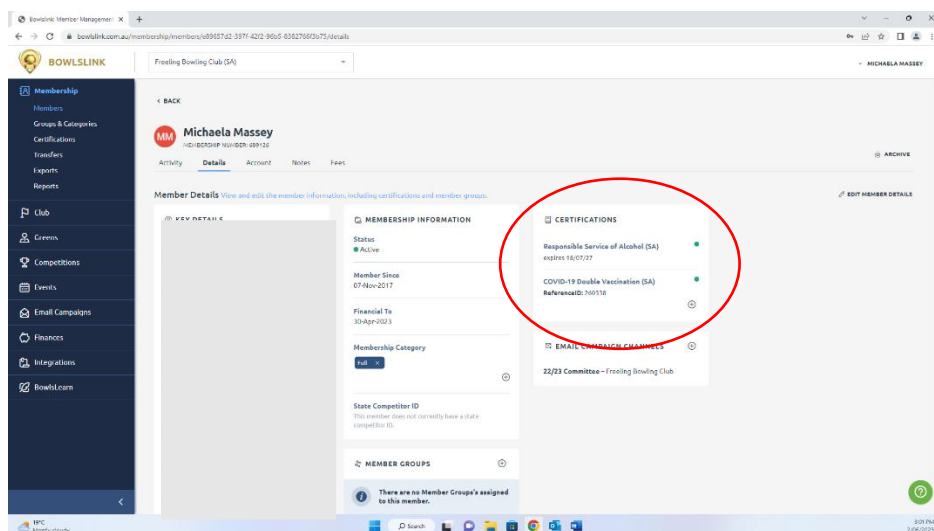
2. When selecting your profile selection, you need to ensure you are clicking the one that is club administrator access, this is the one that has club administration above it and should have "(SA)" in brackets after the club name. See below the one in green is the correct profile to select.



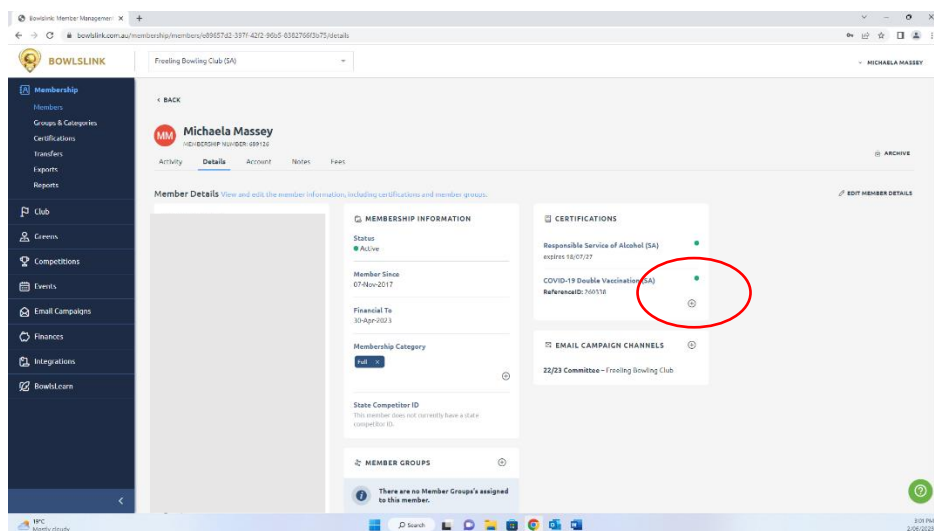
3. This will then show the membership of the club. 4. You can either scroll to find the member you are looking for, or you can search their name. To search, type their name in the search bar next to the blue filter button as shown below.



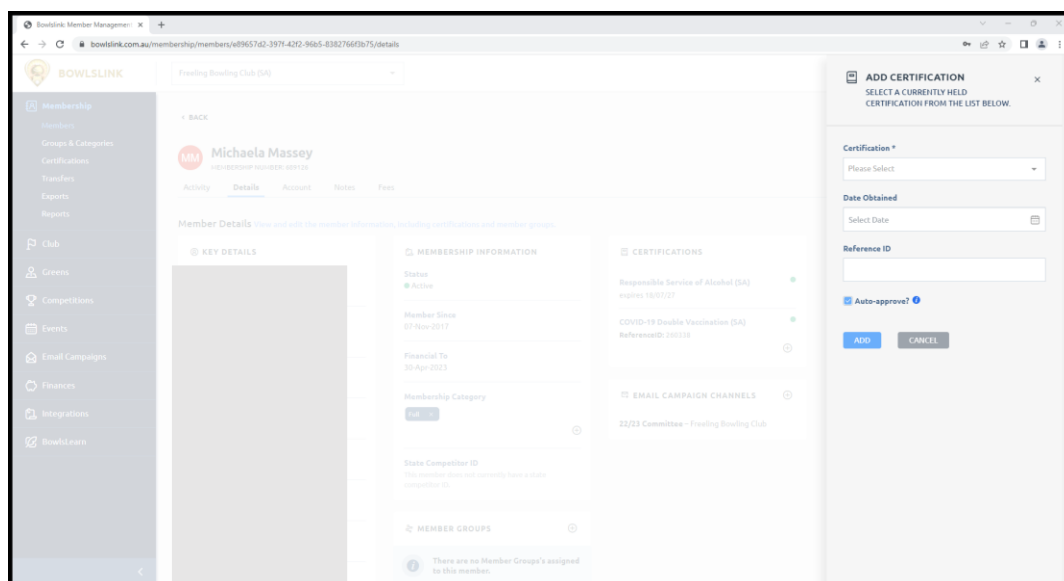
- Then you need to go into their profile, you can simply click on the members last or first name.
- Once in their profile, the certifications section is on the right hand side, and any already there you will be able to see. *Note the grey box from here onwards is to block out personal data of the membership used.



- To add a certification – click the + in a circle symbol in the certifications box as shown below.



- This will bring up a screen on the right for the certification details, will look like below.



9. For the certification, you will need to use the drop down box to scroll through, or use the search bar, for what you are trying to add. For example, a working with children check or responsible service of alcohol. Please note that there are multiple of these as one for each state, be sure to select the one with (SA) in the title.
 - Please note there are certain certifications that clubs can add, and certain certifications Bowls SA needs to add.
 - Club examples
 - RSA's
 - Police Checks / WWCC for Board/Committee members
 - Bowls SA
 - WWCC for Coach Accreditations
 - Officials Accreditations (Marker, Measurer and Umpire)
 - Coach Accreditations
 - Pennant Permits

The screenshot shows the BowlsLink Member Management interface. On the left is a sidebar with navigation links: Membership, Club, Greens, Competitions, Events, Email Campaigns, Finance, Integrations, and BowlsLink. The main area displays the profile of Michaela Massey, a member of the Freeling Bowling Club (SA). The profile includes key details like address, date of birth, and contact information, as well as membership information and a list of certifications. A modal titled 'ADD CERTIFICATION' is open on the right, allowing the user to add a new certification. The modal includes a dropdown for 'Certification' (currently set to 'Responsible Service of Alcohol (SA)'), a date picker for 'Date Obtained', a date picker for 'Valid Until', a file upload section for 'Supporting Documentation', and a text field for 'Reference ID'. There is also an 'Auto-approve?' checkbox and 'ADD' and 'CANCEL' buttons at the bottom.

10. Now you can fill in the rest of the details.
 - Date obtained - this shows up in a calendar style, use the arrows on the calendar pop up to select the month, year and date obtained.
 - Valid Until – if there is a time limit on the certification, enter that date. If there isn't an expiry on the qualification like an RSA (responsible service of alcohol) just pick a date that is far away, for example 10 years would be fine. It won't let you not put one in so you have to make one up.
 - You can choose to add any supporting documentation for example a photo or pdf copy of the certificate or email.
 - You can also add a reference ID, for example if entering a working with children check for a member here you would add their reference SRN number which is in a 'xxxx-xxxx' format.
 - The little auto-approve tick box is good to tick as it approves the certification and in another tab in bowlslink it will show the name of who approved it, which is who entered it. Good for quality checks.
 - once all the details are entered, click the blue add button and the certification will show up. Then you are all done – it saves as soon as you click add so you will be able to log out or change the page after doing so.