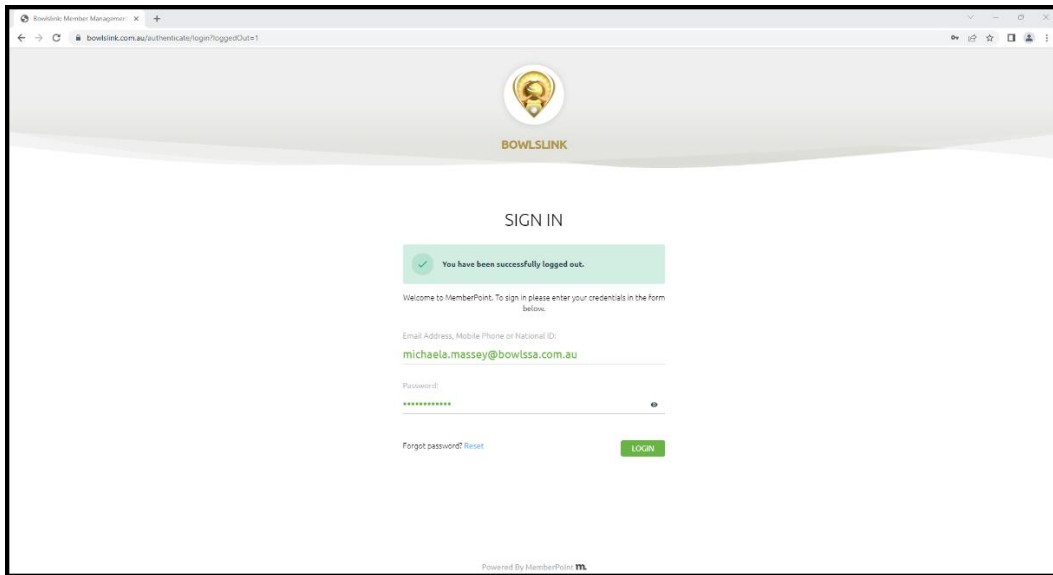
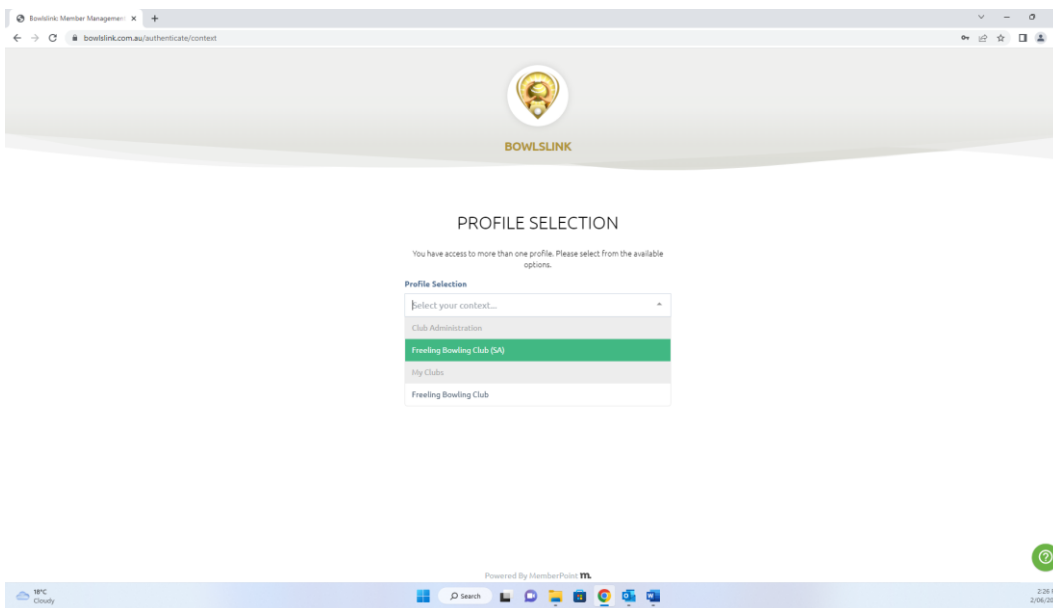


## How to assign member categories to members

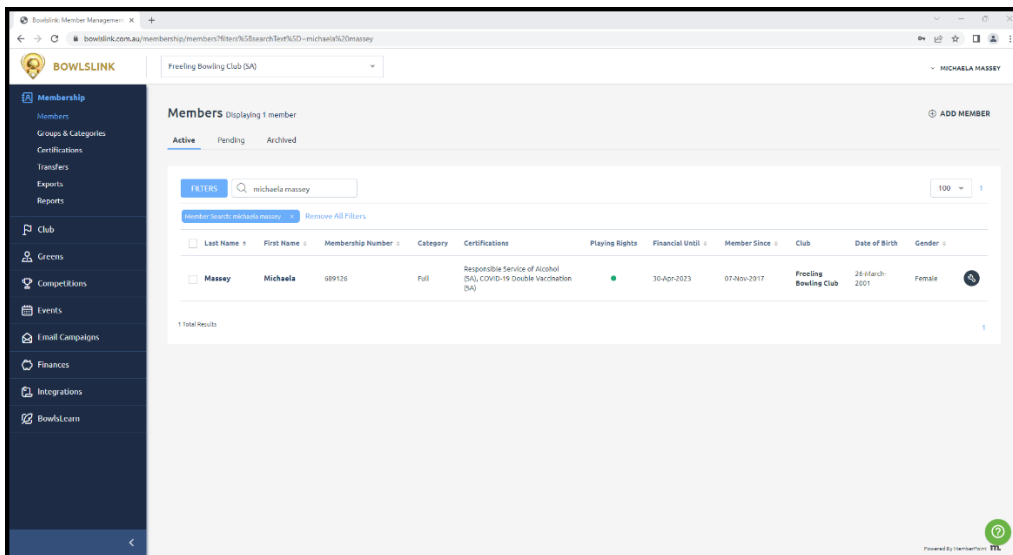
### 1. Log in with your email and password



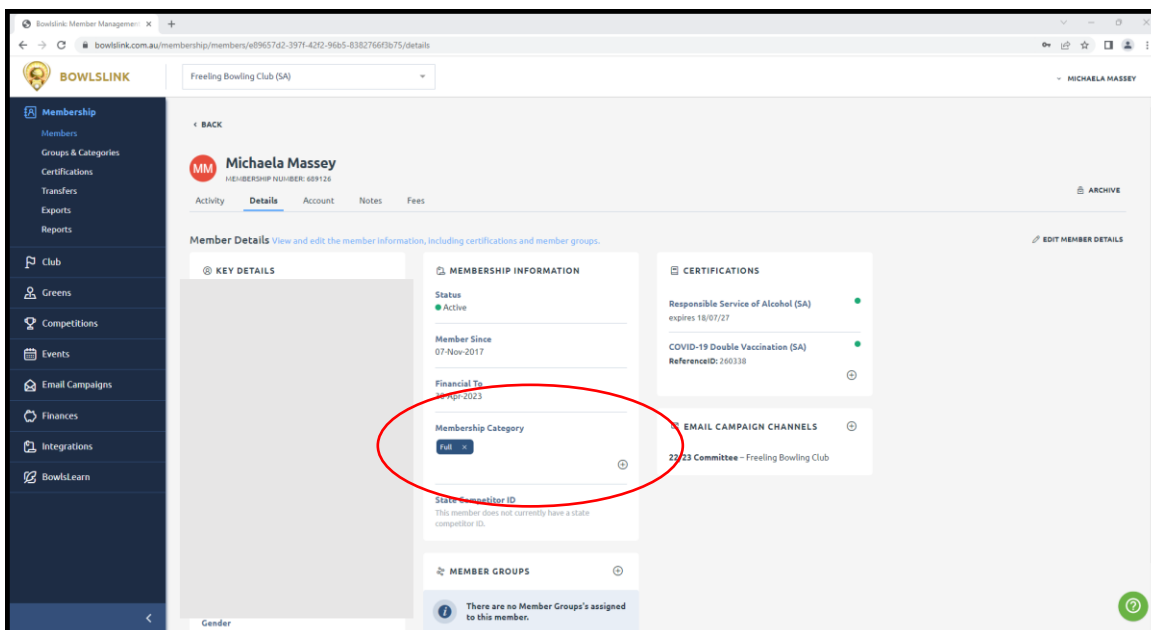
2. When selecting your profile selection, you need to ensure you are clicking the one that is club administrator access, this is the one that has club administration above it and should have "(SA)" in brackets after the club name. See below the one in green is the correct profile to select.



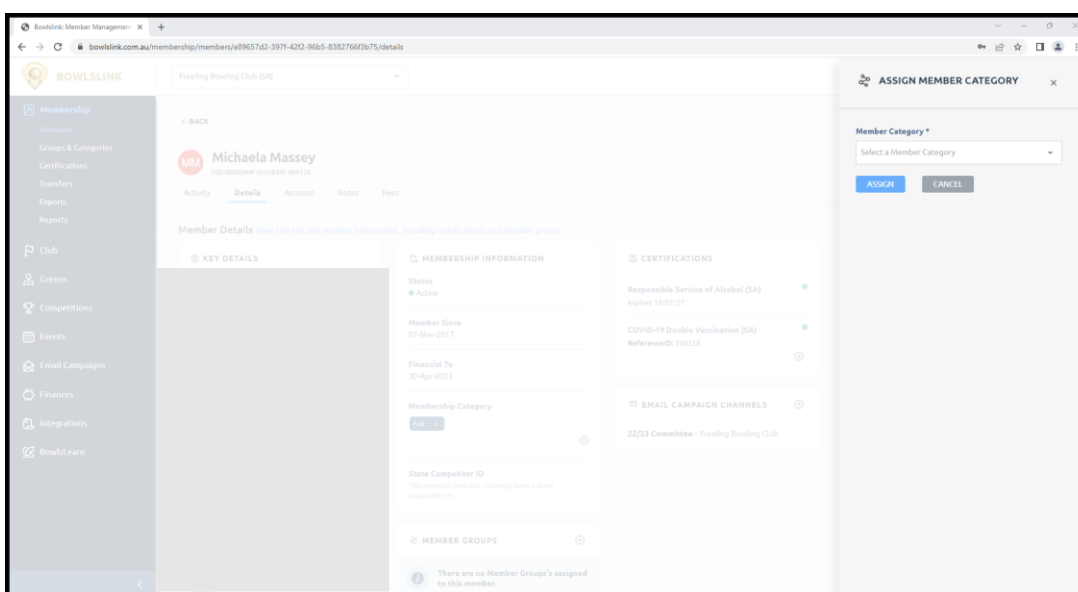
3. This will then show the membership of the club.
4. You can either scroll to find the member you are looking for, or you can search their name. To search, type their name in the search bar next to the blue filter button as shown below.



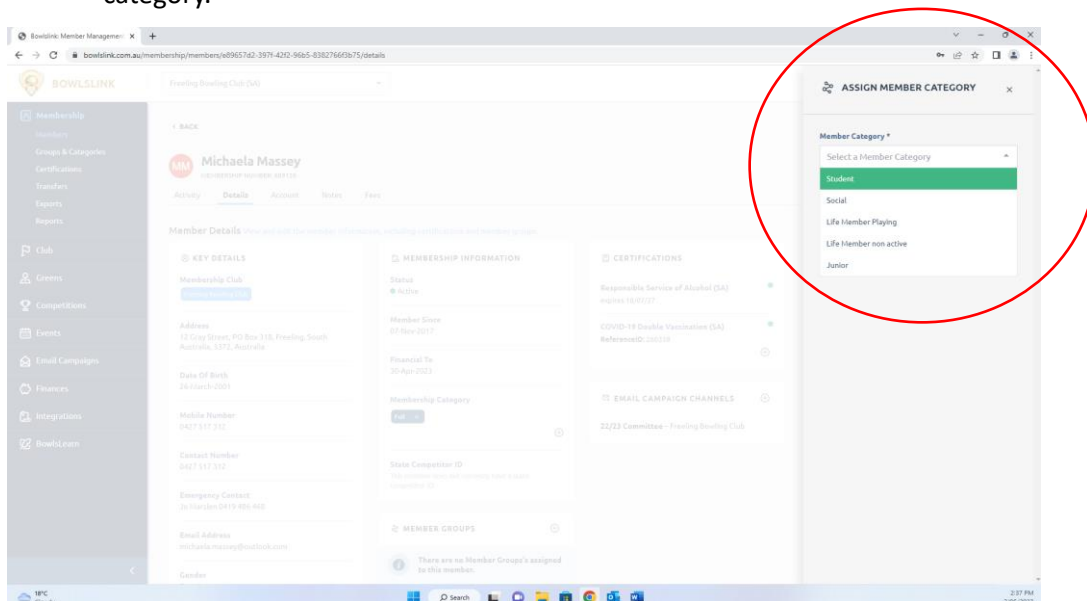
- Then you need to go into their profile, you can simply click on the members last or first name.
- This will then bring up all the details of that member. To add them to a membership category, this is the middle section, there is a 'membership category' title and there is a little + in a circle. You need to click the +. See below circled in red is the area to look at and click. \*Please note in below example the grey box is blocking personal information of the member profile being used.



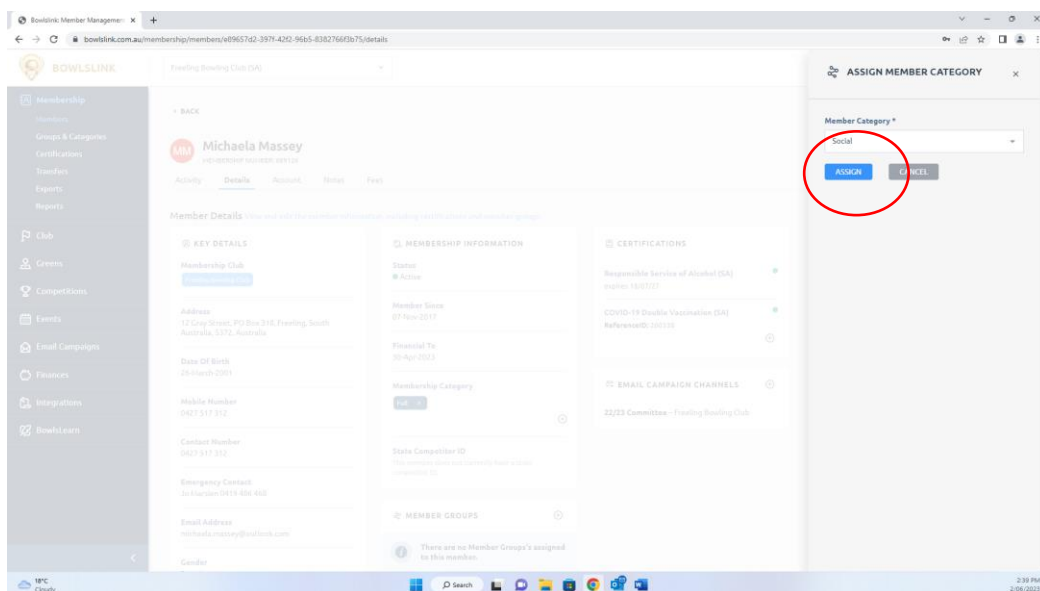
- Once you click on the +, there will be a section show up on the right hand side, should look like below.



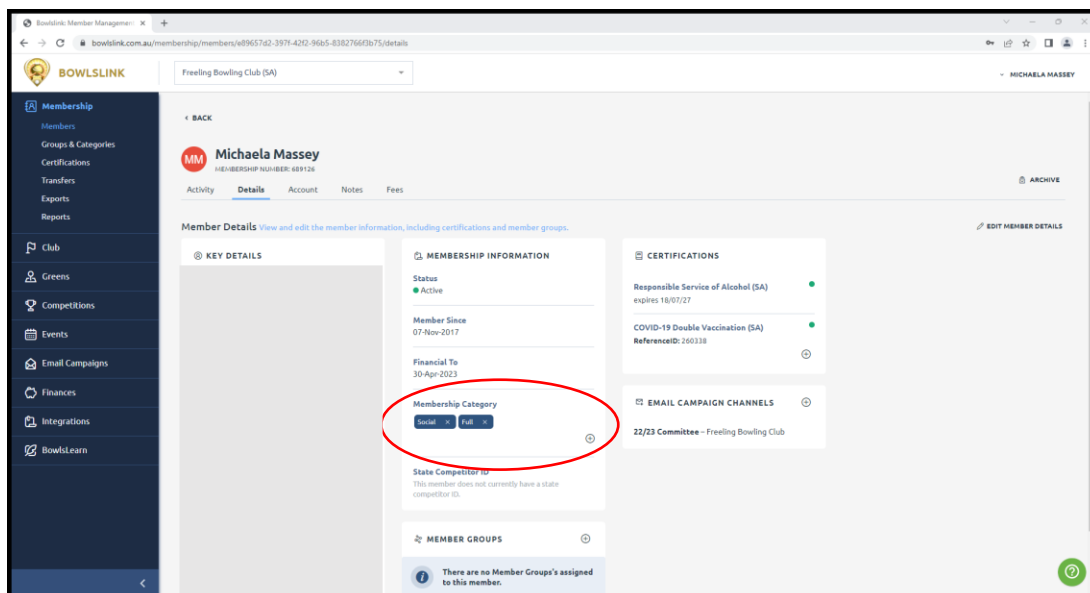
8. Now from the drop down box, you can select which member category to assign them based on what membership they have at the club, full member, social member, night owler, depends what settings your club has. If they apply to a member category not listed, see step 12 onwards which show how to add a new category.



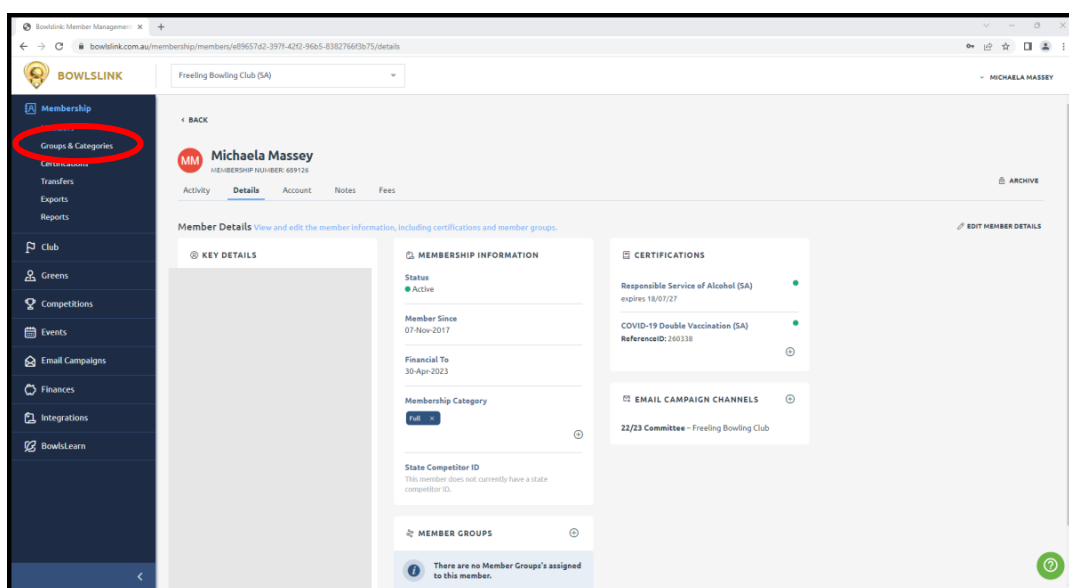
9. Once you click the category you need, click the blue assign button as outlined below.



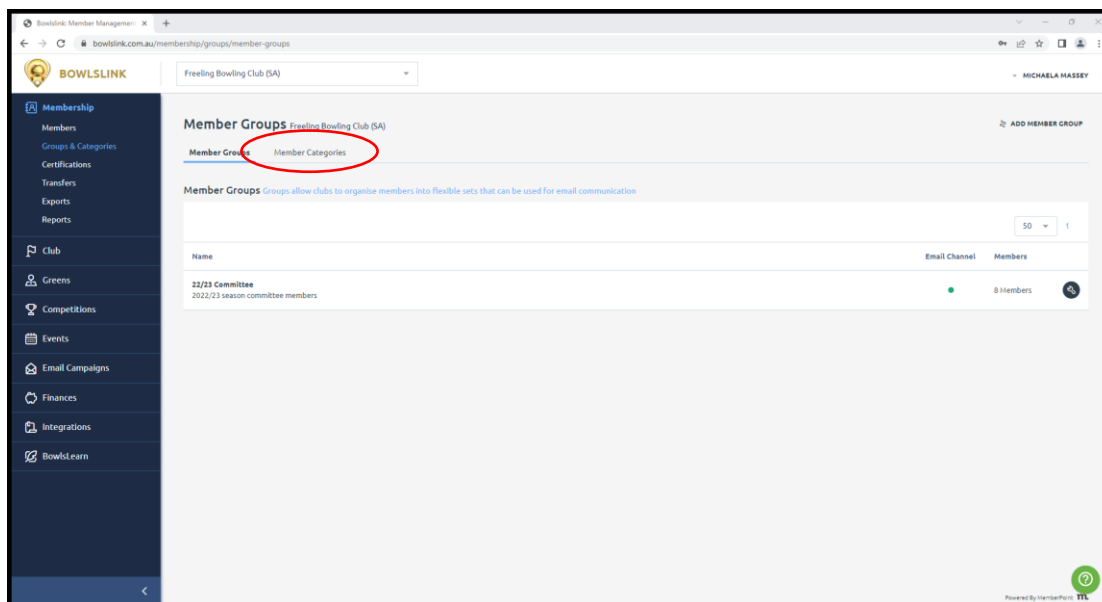
10. Now they are part of that category, and it shows in a dark blue box in the membership category as circled below. There is no need to save anything after this, if you go log out or click on a different page the membership category has been assigned and wont go anywhere unless you remove it as per step 11 below.



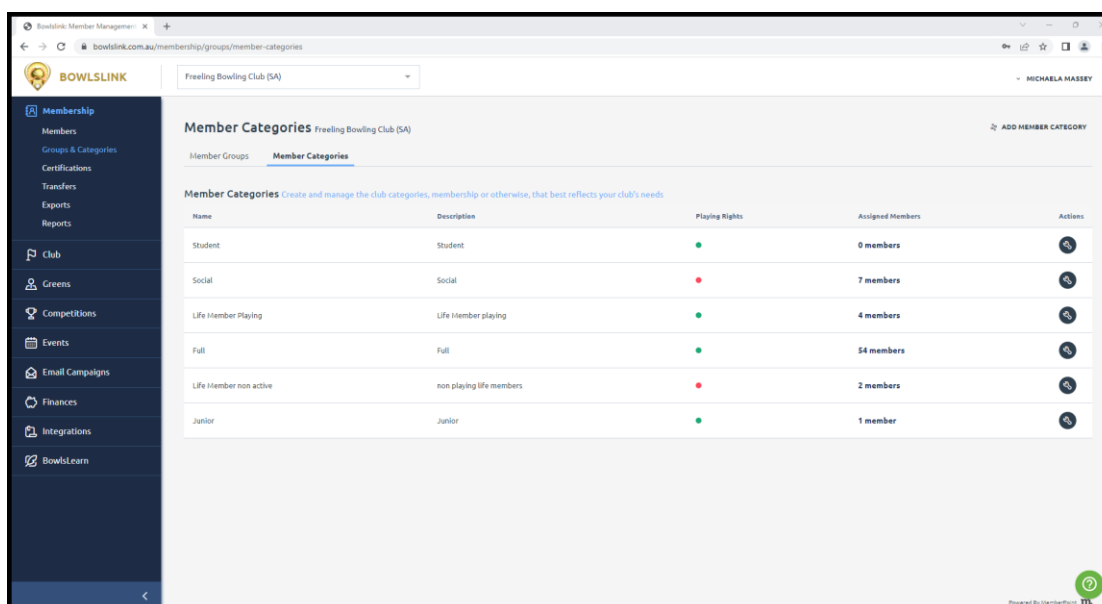
11. If you accidentally assign the wrong one or need to change it, simply click the 'x' on the blue block. It will come up with a pop up in the middle of the page to enter the code shown to remove them from that category. Type the code as shown and click the remove button, then they won't be in that category and you can reassign them to the correct one.
12. If the category they need isn't there, you will need to click on 'groups and categories' on the left in the membership tab as shown in red below.



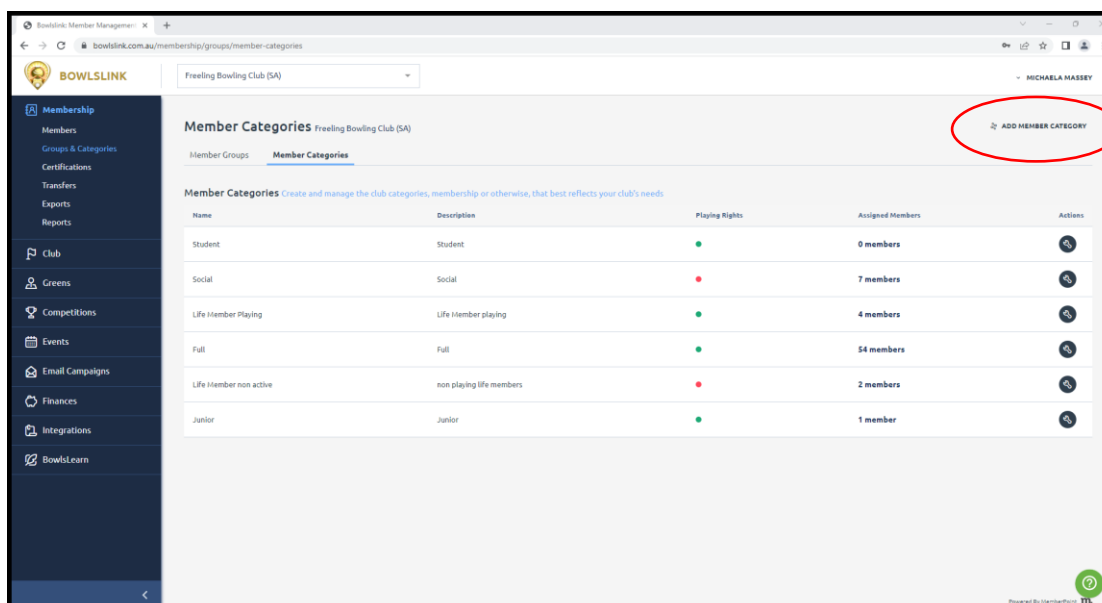
13. The screen will first show the member groups, we need to click on member categories. The screen will look like below, but you will need to click on member categories which is shown in red.



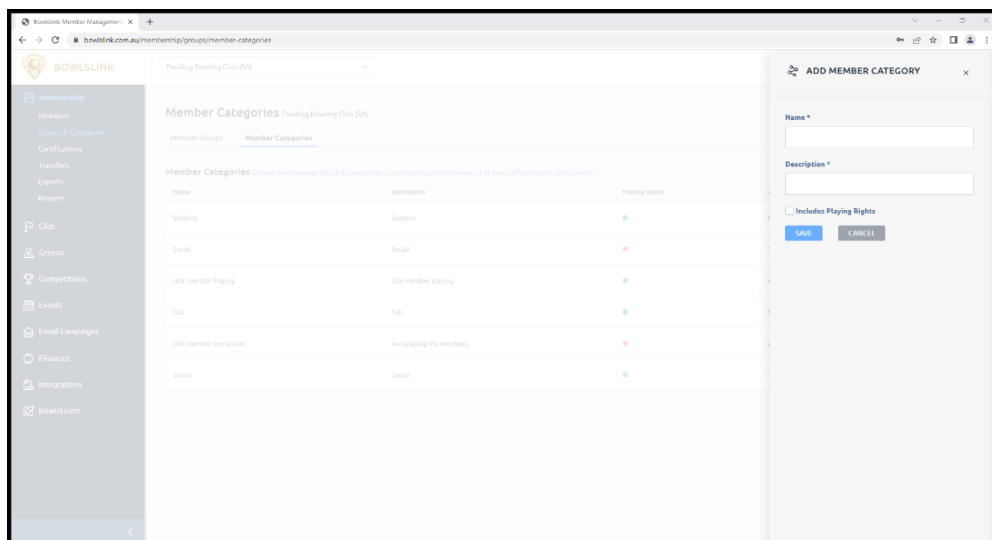
14. The screen will then look like below with whatever categories are currently set up for the club.



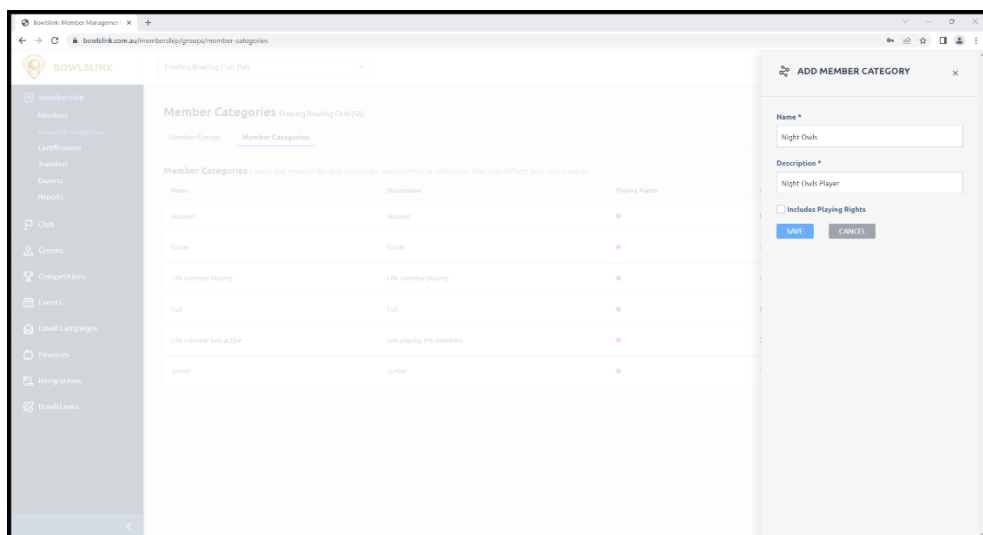
15. To add a new one, click the 'add member category' on the top right shown in red below.



16. This will have a pop up on the right hand side of the screen to fill out and will look like below.



17. Enter the name and description, these can be the same or the description can have a little bit more detail. For example, Name - Night Owls, Description – Night Owls Player.



18. Next is an important little tick box. This is for playing rights. This needs to be ticked for the member categories that relate to members who pay their fees that are counted as Bowls SA members as well – these playing rights are for pennant competition and also allows the player to be eligible for state events. You would need to tick the box if you are creating a category for full members, or for life-members that still play. Leave the box blank for social members or night owls members. Then click the blue save button as shown in red below. If you have had to create this category, go back to steps 4-11 to add a member to that category.

