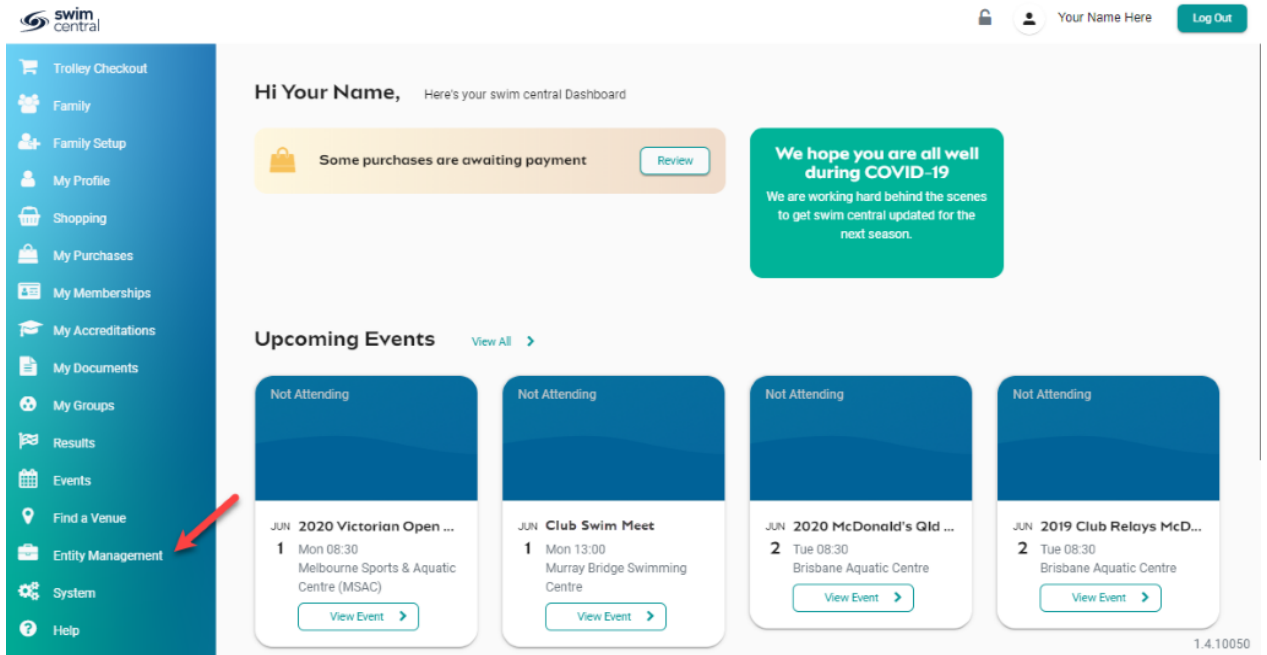


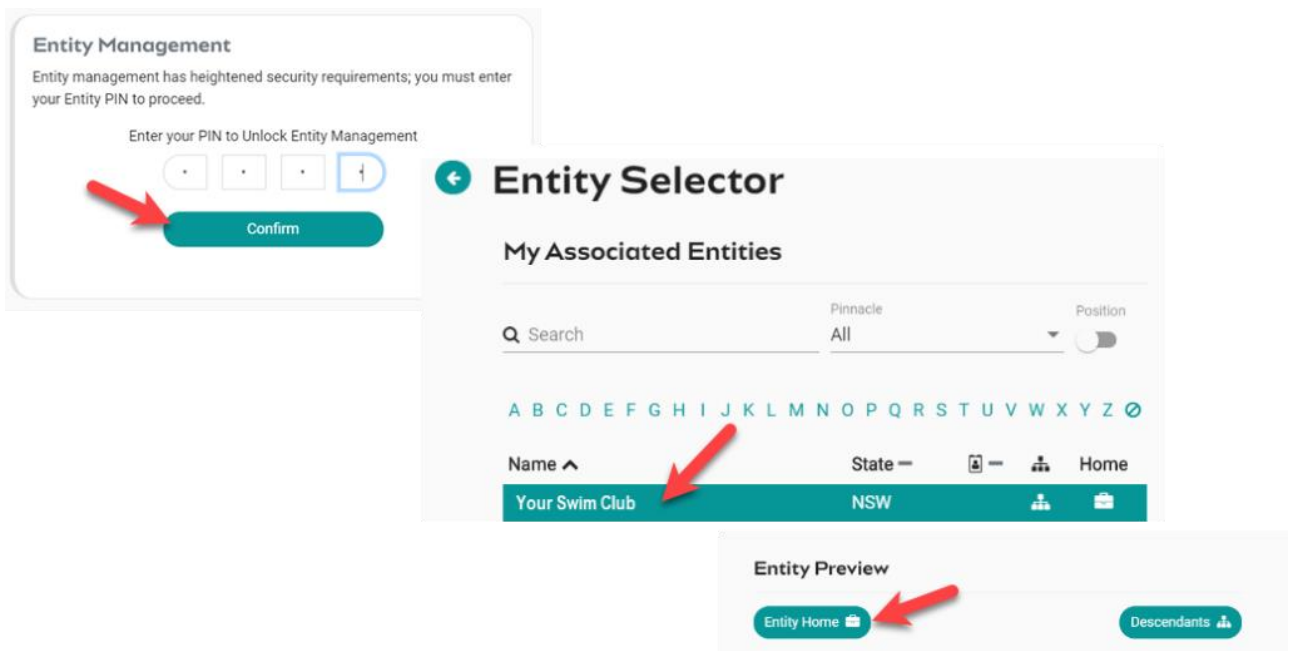
## HOW TO SET UP NEW MEMBERSHIP PRODUCT

This help guide is for Club Administrators to set up brand new membership products for their club where the automatic renewal/replacement process is not being used. To replace/renew existing products, please refer to the **How to Set Up Replacement Products** help guide.

From your home screen, select **Entity Management**



Enter your entity PIN and select **Confirm**, highlight/select your Club, and then select **Entity Home** from near the top right-hand side of the screen.

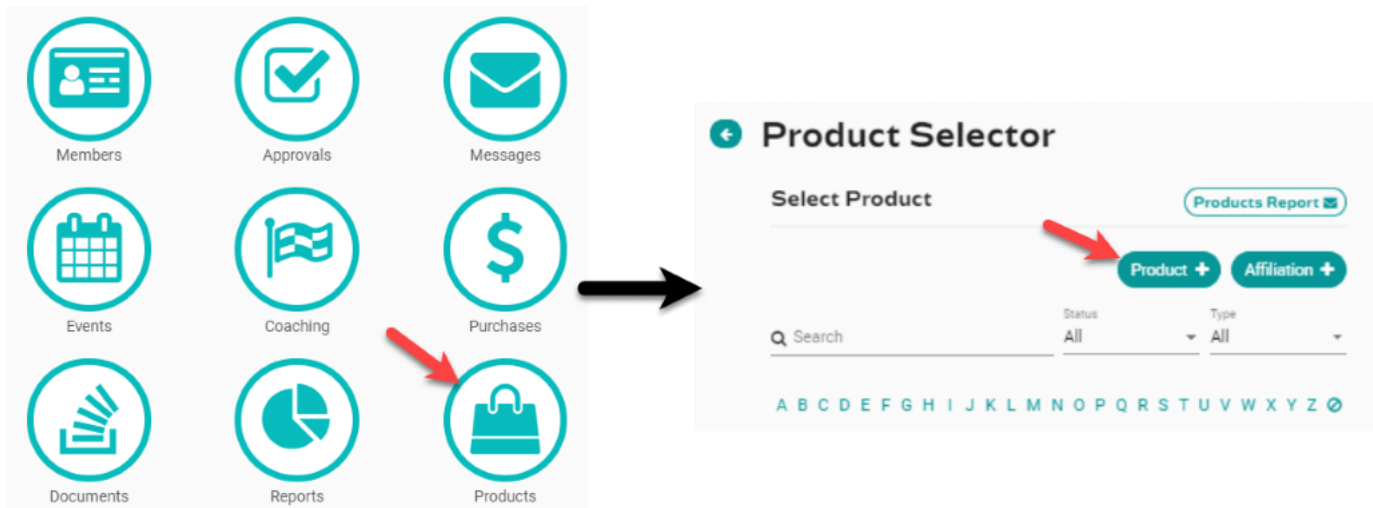


### STEP 1: CREATE NEW MEMBERSHIP PRODUCTS FOR YOUR UPCOMING SEASON

Once you have determined your Club portion of the fees for the new season and made all 2019/2020 memberships unavailable for purchase, you can now create your replacement membership products in Swim Central.

Access the *Product Selector* by clicking on the **Product** icon in your entity home. Here you can view a list of your Club's current products, as well as add new ones.

Select the **Product +** option



Enter the product details for the membership.

The screenshot shows the 'Product Details' form. At the top, there are 'Detail' and 'Summary' tabs. The form has two main sections: 'Config' and 'Payment'. The 'Config' section has two toggle switches: 'Component Only' and 'Hide From Requirement Lists'. The 'Payment' section has a 'Payment Type \*' dropdown menu with 'Upfront Payment' selected. Below the form is a yellow warning box with the text: 'To proceed, ensure the following items are addressed: Product Type is required, Product Name is required'. At the bottom, there are three buttons: 'Back', 'Cancel', and 'Next'.

**Product Type:** Select your product type from the drop-down list. For membership products, choose *Membership*

**Product Name:** Type in a name for your product [e.g. Jr Swimmer (8 yrs & Under) – 2020/2021]. It is strongly recommended that you include the season (e.g. 2020/2021) of the membership in the name to provide clarity for members when purchasing.

**Component Only:** Please leave this field toggled **OFF**. Only Region/Area and a above membership products will be component only.

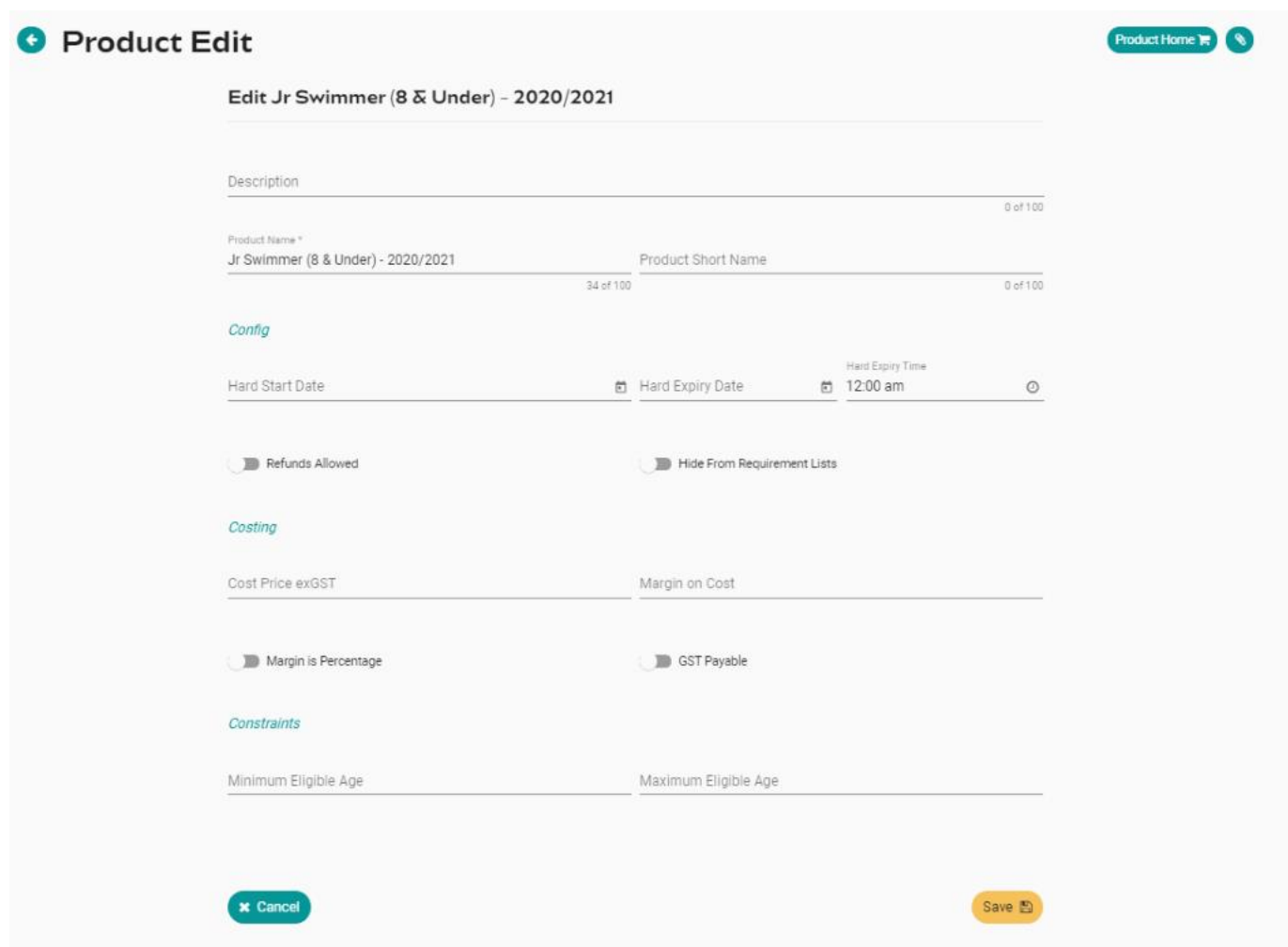
**Hide from Requirement Lists:** This field determines if the product will appear in the list of requirements possible to nominate for a meet. We recommend Clubs:

- Toggle **OFF** for dry memberships (e.g. Life Members, Coaches, Parents)
- Toggle **ON** for wet memberships (e.g. swimmers)

**Payment:** Clubs do not have access to edit the boxes under payment. Should remain as **Upfront Payment**.

Select **Next**, review all information and then select **Save**.

You will be taken to a screen to edit further details along with pricing.



The screenshot shows the 'Product Edit' interface for 'Edit Jr Swimmer (8 & Under) - 2020/2021'. The form is organized into several sections:

- Description:** A text input field with a character count of '0 of 100'.
- Product Name:** A text input field containing 'Jr Swimmer (8 & Under) - 2020/2021' with a character count of '34 of 100'.
- Product Short Name:** A text input field with a character count of '0 of 100'.
- Config:** Contains date and time pickers for 'Hard Start Date', 'Hard Expiry Date', and 'Hard Expiry Time' (set to '12:00 am').
- Costing:** Includes toggle switches for 'Refunds Allowed', 'Hide From Requirement Lists', 'Margin is Percentage', and 'GST Payable'.
- Constraints:** Features input fields for 'Minimum Eligible Age' and 'Maximum Eligible Age'.

At the bottom of the form, there are two buttons: a teal 'Cancel' button and a yellow 'Save' button.

**Description:** This is an optional field, which will show in the product catalogue. *While this field is not mandatory it can be helpful for members.*

**Product Name:** This field is prepopulated from your initial product creation steps.

**Product Short Name:** This field is optional and will display on a member's Membership Card within their My Memberships tile. We suggest including the season (e.g. 2020/2021) somewhere in the membership name.

### Configuration

- **Hard Start Date:** This date needs to be the first date of the season and is the date the product will be valid from
- **Hard Expiry Date:** This date needs to be the last date of the season and is the date the product will be valid to
- **Hard Expiry Time:** The time on the last day of eligibility that a product switches to expired. Often set to 11:59 PM. Select **Confirm** to set time.
- **Refunds Allowed:** Toggle **ON** the refund allowed field.  
*This will allow refunds to be requested for this product, it does not guarantee a refund.*
- **Hide From Requirement Lists:** This field should be prepopulated from earlier product creation steps and determines if the product will appear in the list of requirements possible to nominate for a meet. We recommend Clubs:
  - Toggle **OFF** for dry members (e.g. Life Members, Coaches, Parents)
  - Toggle **ON** for wet members (e.g. swimmers)

### Costing

- **Cost Price exGST:** This is the cost of your Club's membership component (**do not include the SAL, State and region amounts here**). If your Club is registered for GST, please enter the cost excluding GST as Swim Central will add GST to the amount.
- **Margin on Cost:** This field is not required but allows your Club to add a margin on top of the cost price; the margin could be a dollar amount or a percentage.
- **GST Payable:** Ensure this is toggled appropriately for your Club.

### Constraints

- **Minimum Eligible Age:** A constraint which needs to be set for any membership product which is restricted to members over a certain age (e.g. Competitive Swimmer 9&O membership product would require a Minimum Eligible Age of 9)
- **Maximum Eligible Age:** A constraint which needs to be set for any membership product which is restricted to members under a certain age (e.g. Swimmer 8&U membership product would require a Maximum Eligible Age of 8)

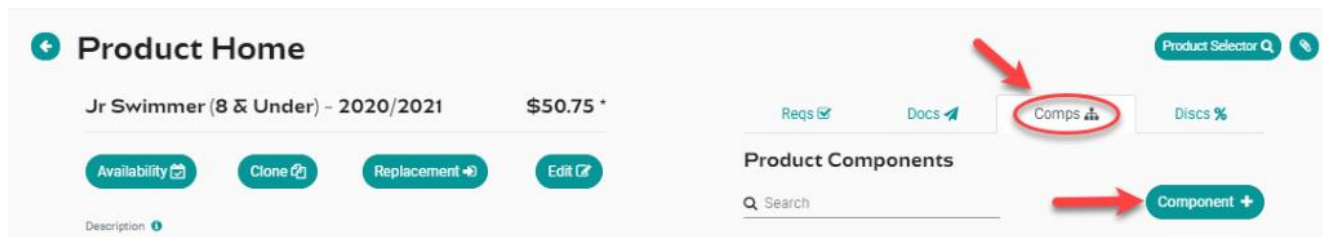
Double check your product details and then select **Save**.

### STEP 2: LINK MEMBERSHIP PRODUCT TO REGION/AREA, STATE, AND SAL FEES

With the product now created, it is critical to correctly link that product to the appropriate fees for Region/Area, State and SAL. This step ensures that members can compete and are covered by insurance.

- From the Product Home screen, select the **Comps tab** on the right.
- Select the **Component +** button.
- Select from the list, the component that links to this membership product.
- View information about the component on the right, confirming it is correct.

- Select the blue **Next** button at the bottom of the list, then the red **Confirm** button.
- Your membership product is now linked to the region/area, state, and national components in one-step.



**Extra optional product features you can add at this stage using the other tabs across the top right on Product Home.**



- **Requirements:** This feature allows your club to set-up a certain document requirement which will restrict who can purchase that specific membership. To use this feature, set a document requirement on the membership that the prospective member must upload into their Swim Central account document library. Only after uploading the document into Swim Central in the proper document category, will the prospective member be allowed to purchase the membership (e.g. you can ask the member to load a screen shot of the confirmation email the club sent them, etc.).
  - It is recommended to use the following settings for this new member scenario:
    - Document Category: **Governance**  
**\*\*Club then instructs prospective member to upload the required document into the document library of the person requesting membership. Upon upload, member MUST use Document Category = Governance and Document Type = Membership Eligibility Approval**

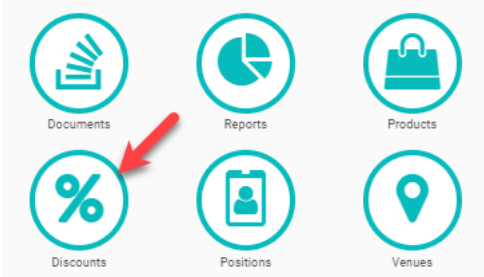
*\*\*Document requirements can also be applied for Coach or Technical Official memberships with a document category of the proper accreditation document.*
- **Documents:** This feature allows you to provide a certain document to every member who purchases that membership product. For example- member handbook or club rules information packet. This document will be placed in that members document library upon completion of the purchase of the membership. The additional benefit of this, is the document can be updated whenever needed, and it will be updated for everyone who has that membership product automatically.
- **Discounts:** Allows you to set an “early bird” or “late joiner” discount (amount or percentage) based on dates (e.g. you could set that an x% or \$x discount to apply within a certain date range). This discount will only apply to your Club component amount (and not any components from region, state or national).

**STEP 3: SETTING UP VOLUME DISCOUNTS**

Swim Central allows clubs to offer volume discounts for members paying for multiple membership products at the same time. However, clubs are not required to offer discounts. The discount is for the Club component only of the total membership price. Clubs cannot set discounts for regional/area, State, and National level components.

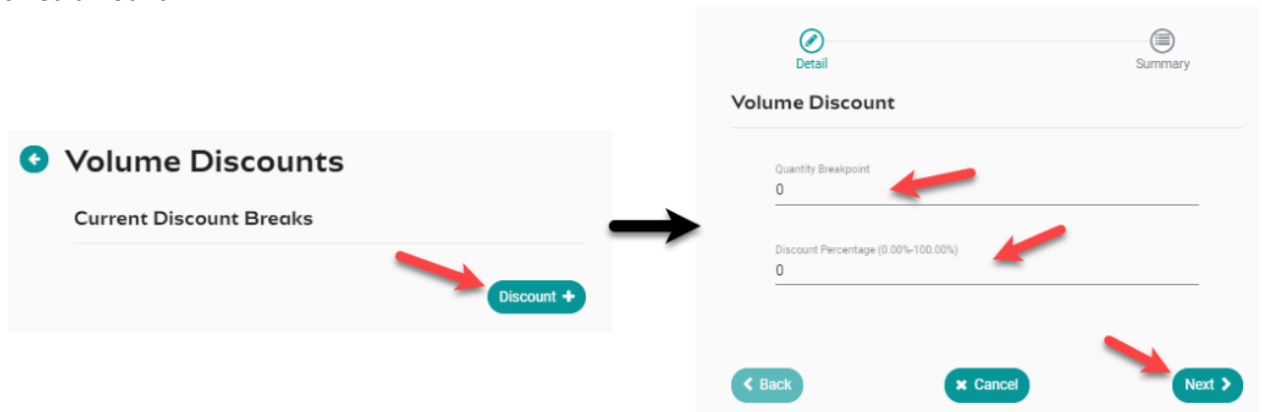
Keep in mind Volume Discounts are for a certain number of membership products purchased at the same time (e.g. if a parent has Y number of paying membership products (any combination) in their shopping trolley they will receive an X% discount for each of the Club's membership products in the shopping trolley).

To set up volume discounts, select the **Discounts** icon from your *Entity Home*.



Select the **Discount +** button and enter required information.

- **Quantity Breakpoint:** The number of membership products this discount will apply to (e.g. if you enter 3 here, it will apply this discount to any shopping trolley with 3 x paying membership products from your Club).
- **Discount Percentage:** The percentage discount that will be applied to your Club's membership product amount (not any included components) if the shopping trolley has the specified amount.



Select **Next** to confirm the details of the discount you created then select **Save**.

You have now added a volume discount for anyone who's trolley contains the number of products you have specified in the above steps. Repeat for as many discounts that are required.

**\*\*Please Note: discounts will NOT apply to \$0 products. So, if you were to set up a volume discount for 3 swimmers, and one of them was voucher recipient with a \$0 valued membership product and therefore owed nothing, then Swim Central would only recognize 2 of those 3 swimmers for a discount, and so the Volume Discount of '3' would not apply.**

#### **STEP 4: UPDATING YOUR CLUB'S TERMS AND CONDITIONS**

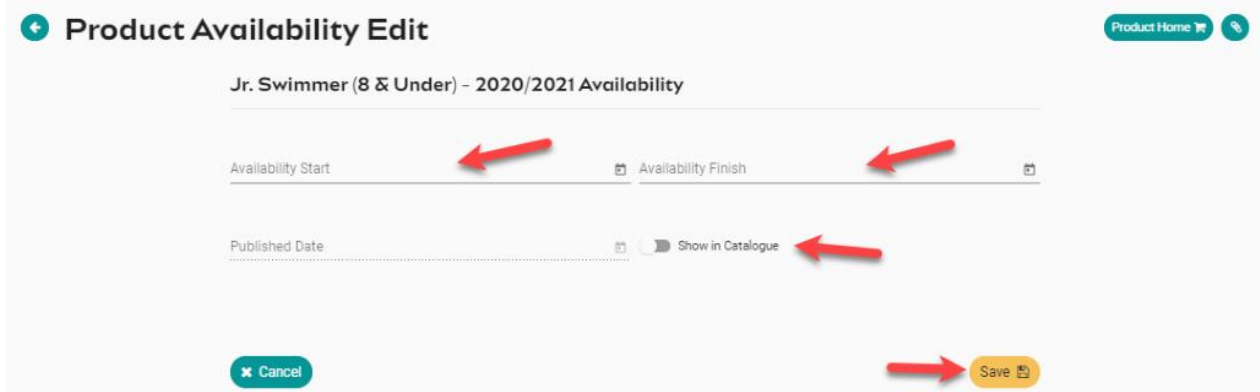
Clubs also need to ensure their terms and conditions have been updated for the new season. These terms will need to be agreed to by anyone purchasing a product from your Club. You can update your Club's terms and conditions using the **Legal Terms** tile from your *Entity Home* screen.

## STEP 5: PUBLISHING YOUR MEMBERSHIP PRODUCTS

Once you have completed the above steps for each of your membership products, you can publish them in your Product Catalogue to make them available for your Members to purchase. ***\*\*This is the same process you followed above when switching off the old product availability but instead you are switching them to be available.***

Publish each product individually following the steps below:

- From the product's *Product Home* screen, select the **Availability** button.
- Enter the **Availability Start** as first date that someone could purchase this product (e.g. today's date – or whatever date you open registration)
- Enter the **Availability Finish** as the last date that someone could purchase this product (e.g. end of season date)
- Toggle **ON** the **Show in Catalogue** field if you want this membership product to show in your Product Catalogue. *You may wish to leave that toggled off in certain circumstances (e.g. a Life Member membership product would not be something that the member would select but something the club would provide to them and therefore you would not publish it in your catalogue).*



The screenshot shows the 'Product Availability Edit' interface. At the top, there's a title 'Product Availability Edit' and a 'Product Home' button. Below the title, the product name 'Jr. Swimmer (8 & Under) - 2020/2021 Availability' is displayed. The form contains several fields: 'Availability Start' and 'Availability Finish' (both with calendar icons), 'Published Date' (with a calendar icon), and a 'Show in Catalogue' toggle switch. At the bottom, there are 'Cancel' and 'Save' buttons. Red arrows in the image point to the 'Availability Start' and 'Availability Finish' fields, the 'Show in Catalogue' toggle, and the 'Save' button.

- Select **Save**
- ✓ Once your product is made 'Available' or 'Published', you will no longer be able to edit it. To confirm the product has been set up and is available, go back to your *Product Selector* list. A green tick should appear next to the product if you have made it available successfully.