

HOW TO SET UP A MEMBERSHIP AT CLUB LEVEL

This Help Sheet is to assist a club to set-up your membership product(s) for 2023 in Swim Central, Masters Swimming Australia's (MSA) new membership platform.

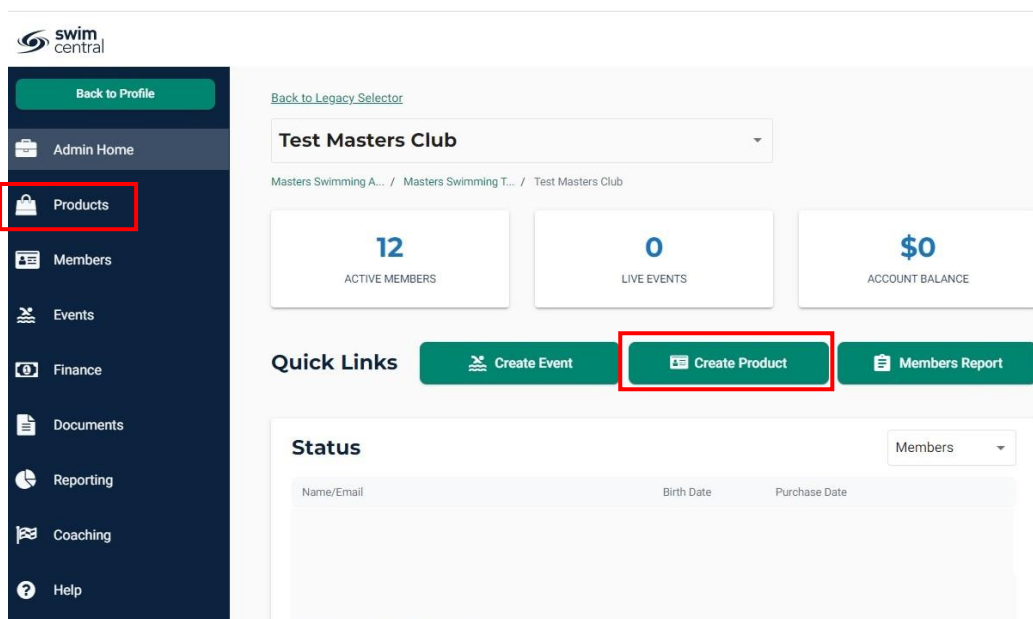
IMPORTANT INFORMATION:

NO MEMBERSHIP PRODUCTS ARE to be made available before the 1/11/2022 (1 November 2022)

- This Help Sheet is to assist you with setting up your Clubs **2023 – 12 Month Swimmer** – valid from the 1/11/2022 to the 31/12/2023
- You **CANNOT DELETE** a Published product (you can delete in draft). MSA recommends saving it as a DRAFT so you can review it before you publish it.
- Publishing a product makes it available for purchase in the Store from the **Availability date**. You do not need to manually make it available on the day. Club products can be published but are **NOT to be made available until the 1/11/2022**
- If you have published it and find a mistake, you can remove it from the Store by removing the tick next to Show in Catalogue under the Availability tab in Extra Information. (See last page of this Help Sheet – page 8)
- You can change the dates that this product is available to purchase from the Store after it has been published (you **CANNOT** change the dates it is valid for)
- Club membership products are **NOT** to be created as a Component

TO CREATE A MEMBERSHIP PRODUCT FOR 2023

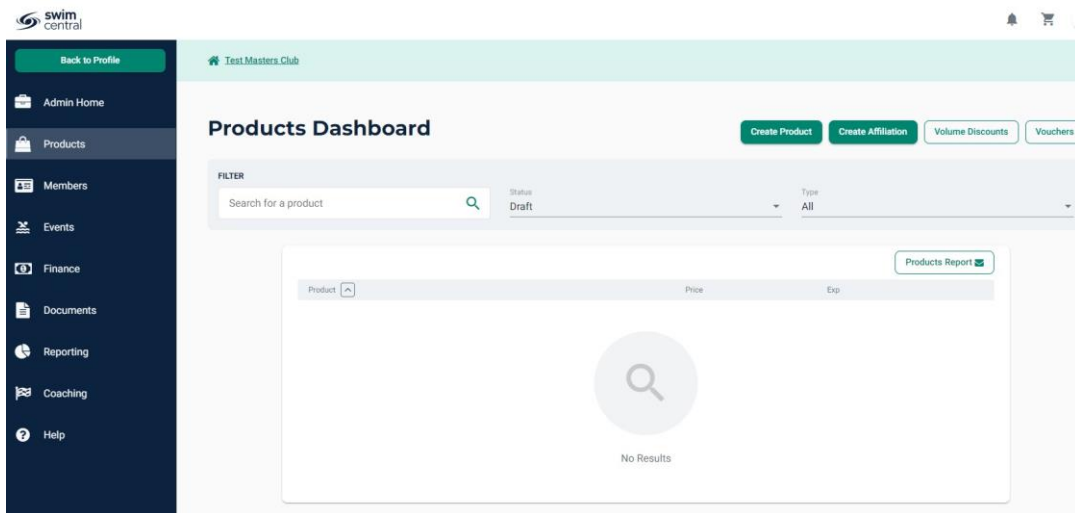
1. Navigate to Admin Home and click on Products tab from the left hand menu or Create Product from the Quick Links tab



The screenshot shows the Swim Central Admin interface. On the left, a dark blue sidebar menu has the 'Products' tab highlighted with a red box. The main content area shows a dropdown menu for 'Test Masters Club' and three summary cards: '12 ACTIVE MEMBERS', '0 LIVE EVENTS', and '\$0 ACCOUNT BALANCE'. Below these is a 'Quick Links' section with three buttons: 'Create Event', 'Create Product' (highlighted with a red box), and 'Members Report'. At the bottom, there is a 'Status' section with a table header for 'Name/Email', 'Birth Date', and 'Purchase Date'.

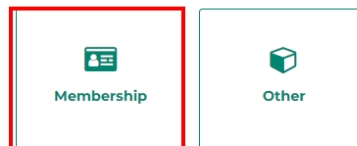
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- The Products tab on the left hand menu takes you to the Products Dashboard below where you click on the Create Product tab and it takes you to the Select Membership page

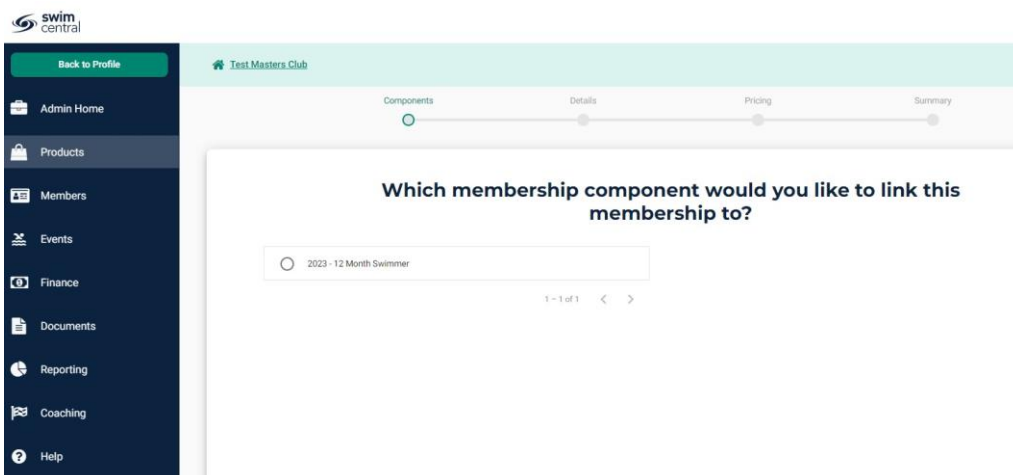


- From the Quick Links it takes you to the Select Membership page
- The type of product you are setting up is a 'Membership' one (NB. 'Other' is to be used for Non-Membership products only)

What type of product would you like to create?

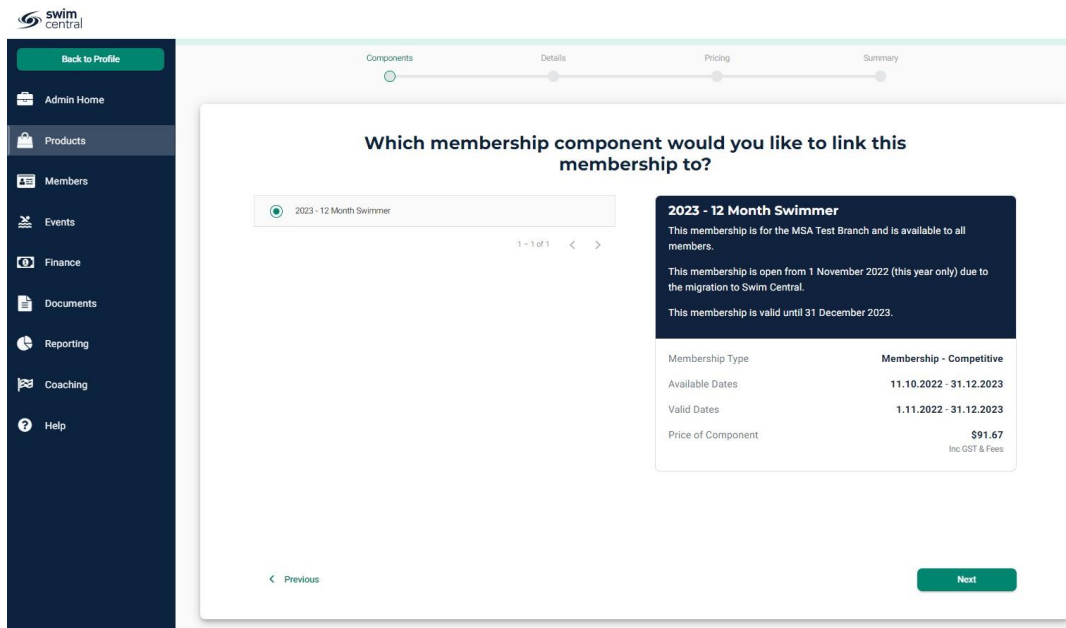


- Select the product you wish to link to (**2023 – 12 Month Swimmer**) to create your Club membership product.



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6. When you click on the product the details of the product will list on the right-hand side, then select NEXT



7. Now you enter your membership product details: * red asterisk are compulsory fields
- *** PRODUCT NAME:** MSA suggests the following format for product names:
 - Year - Term of the membership(how long) membership type (swimmer)
 - For example; 2023 – 12 month Swimmer
 - **PRODUCT SHORT NAME:** this name appears on some reports
 - *** DESCRIPTION:** here you can describe what product it is (ie you may have more than one membership type – youth, regional, early bird) It is recommended you add your Club name in here in the first line (there are 1000 characters to use)
 - **PRODUCT REPLACEMENT:** We currently recommended not to use due to the migration on products. Please leave blank
 - **REQUIREMENTS TO PURCHASE:** only set if documents are required at purchase: MSA recommends not using this for 2023 memberships
 - **DOCUMENTS TO ISSUE:** only set if you wish to issue documents on purchase completion, MSA recommends not using this for 2023 memberships
 - **AVAILABLE START AND END DATES:** these are the dates you want members to be able to start purchasing this product and when you want to stop them for purchasing the product
 - **Start date** – the date that the product will be available for purchase in the Store, enter **1/11/2022** for the Availability Start Date (this can be edited)
 - Club products are **NOT to be made available until the 1/11/2022**
 - **End date** – the last date you want your product to be available for purchase

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- **VALID DATES:** this is set by the National product and cannot be edited
- **MIN ELIGIBLE AND MAX AGE:** This is where you can nominate the start age for the product (minimum age is 18 unless the product is for a specific age over 18 – ie 80+)
- **COMPONENT ONLY:** **Clubs DO NOT tick this – leave this blank**
- **HIDE FROM REQUIREMENTS:** leave unticked (for meet requirements)
- Once you have reviewed the details, select **NEXT**

8. Enter your club's membership price ex GST under the Pricing details. The price will populate in the right-hand list inc GST and fees, and provide a total price. Please note if your Club is registered for GST you will see a blue GST tab under the Pricing

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9. You cannot delete a Product. Save it as a Draft to review. You can do this now or go Next to review the product breakdown and you can Save it to Draft then.

The screenshot shows the 'Summary of 2023 - 12 Month Swimmer' page. It includes a progress bar at the top with steps: Components, Details, Pricing, and Summary. The main content is divided into two columns. The left column contains: Membership Name (2023 - 12 Month Swimmer), Membership Short Name (2023 - 12 Month Swimmer), Membership Description (Test Masters Club 2023 - 12 month memberships, valid to 31/12/2023), Available Dates (1.11.22 to 31.12.23), Valid Dates (1.11.22 to 31.12.23), and Eligible Age group (18 to). The right column contains: Linking with membership component (2023 - 12 Month Swimmer), Pricing Details (Upfront Payment, Non-Subscription, Refunds Allowed), Subtotal (\$91.67), and TOTAL (\$101.97 Inc GST & Fees). At the bottom, there are 'Previous', 'Save Draft', and 'Publish to Store' buttons.

10. Once saved, if you want to go back and work on it, go to the Products Dashboard and change the Product status filter to Draft to locate the product

The screenshot shows the 'Products Dashboard' with a search bar and a filter dropdown menu. The filter menu is open, showing options: All, Draft (selected), Expired, Live, and Active Not Live. The dashboard lists a product '2023 - 12 Month Swimmer' with a price of \$101.97 and an expiration date of 31.12.2023. There are buttons for 'Create Product', 'Create Affiliation', 'Volume Discounts', and 'Vouchers'. A 'Products Report' button is also visible.

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- Before publishing, check the details on the summary page. If you need to amend, click Edit Product to return. Select **Publish** when you're ready to make the product Live in the Store

[Test Masters Club](#)

[Product Bounce Link](#)

DRAFT

2023 - 12 Month Swimmer

\$101.97

Inc GST & Fees

Edit Product

Delete

Publish

Product Details

Extra Information

This product is a DRAFT and can be edited.

Description

Description: Test Masters Club 2023 - 12 month memberships This membership is valid to the 31/12/2023
Product Type: Membership - Competitive
Product Short Name: 2023 - 12 Month Swimmer

Config

Component Only: No
Valid Start Date: 1.11.2022
Valid Expiry Date: 11:59pm - 31.12.2023
Refunds Allowed: Yes
Hide From Requirement Lists: No

Pricing

My Entitlement Ex GST & Fees: \$10.00 AUD
Cost Price Ex GST & Fees: \$10.00 AUD
GST Payable: No

Payment

Payment Type: Upfront Payment
Subscription Duration: Non-Subscription

Available for purchase

Availability Start Date: 1.11.2022
Availability End Date: 31.12.2023
Show in Catalogue: No

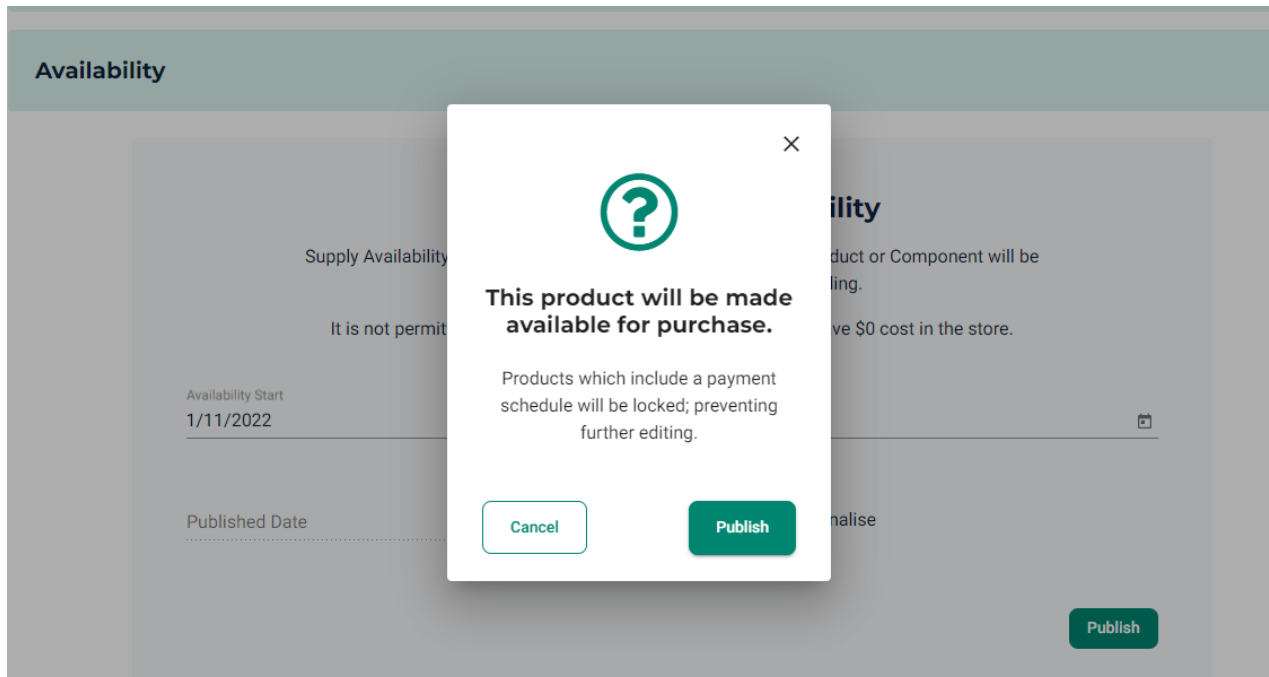
Constraints

Minimum Eligible Age: 18

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12. To publish the product you can click the Publish button when viewing it in draft form (this will take you to the Availability tab) or you can click on the Extra information tab and click on Availability. When you tick the checkbox Publish and Finalise and Select Publish under the Availability Tab you will see a pop up telling you the product is about to be made available for purchase and can no longer be edited. If you are not sure you can cancel and it will stay in draft form. If you are ready you click Publish.
13. When you are ready to Publish double check the date you have made this product Available from – this is the date that it will be available to purchase in the store. Your product will be Active Not Live until the availability date - 1/11/2022

Your Club product is NOT TO BE MADE AVAILABLE BEFORE the 1/11/2022



14. To view your product before the 1/11/2022 you need to click on the Product Dashboard and change the Product filter to Active Not Live.
15. An Active Not Live product is not viewable in the Store and cannot be purchased
16. You may choose to make this product available **AFTER the 1/11/2022 NOT BEFORE** but members will not be able to find this product in the Store until the available date

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17. You cannot delete a product but you can remove it from the store. This means that you are removing the product from showing in the Store. You do this by removing the tick next to Show in Catalogue under the Availability tab in Extra Information.

18. This now makes the product **Active Not Live** and cannot be purchased

Availability

Schedule Product Availability

Supply Availability Start and Finish dates to control when your Product or Component will be available for purchase via the store, or bundling.

It is not permitted to show Life Membership Products which have \$0 cost in the store.

Availability Start	1/11/2022	Availability Finish	31/12/2023
Published Date	8/10/2022	<input checked="" type="checkbox"/> Show in Catalogue	

Save