

## HOW TO SET UP A STANDARD MEMBERSHIP AT CLUB LEVEL

This Help Sheet is to assist MSA Clubs to set-up their Membership products in Swim Central.

### Summary

MSA will create one (1) standard Swimming membership product, which is valid from 1 December to 31 December. We will not be creating separate 12 month & 6-month products. The National Membership product will be called **xxxx Masters Swimming Australia Membership** (where xxxx is the calendar year).

The 12-month National component includes GST and Swim Central fees, and we will apply a \*25% discount to the National Component ONLY, from 1 June to 31 December. This will reduce the National Component to reflect the 6 month membership period. The discount feature in Swim Central allows us to discount our fees from certain dates and means we only need to create one (1) standard membership product.

**NOTE \*** *The 6-month National component is 75% of the 12-month membership (BL7.3)*

### Date-based Discounts

- The 6 month membership discount is generated automatically to any membership purchased from the Valid Start date (1 June) to the Valid End date, and is applied to the National component **and** any products created by Branches and Clubs using the **xxxx Masters Swimming Australia Membership** product.
- Branches and Clubs are encouraged to include a similar discount feature on their own respective fees.
  - Discounts can be applied, or removed, at any time after the product has been published (please do not hesitate to reach out to your Branch/National Office to check your discounts)
  - Clubs can apply more than one discount to their products - e.g. early bird (again please seek direction/assistance from your Branch/National Office on this)
  - If you do not charge a Club fee you do not need to apply a discount.
  - The discount feature is found under Extra Information when creating or editing a product and you need to add a Start and an End date for the discounts.

### HOW TO SET UP A STANDARD MEMBERSHIP AT CLUB LEVEL

- For a 6-month membership period the:
  - Discount START DATE** is 1 June (to match MSA, or 1 July, if preferred)
  - Discount END DATE** is 31 December
- You can add the discount as either a percentage (%) or an amount (\$)

### Steps to creating the standard Club Swimmer Membership product

#### Important Information

- **COMPONENT ONLY:** Clubs DO NOT tick this – leave this blank.

By leaving this blank at Club level it ‘closes’ the product off and is now able to be purchased  
If a Club ticks this the product will not be able to be purchased

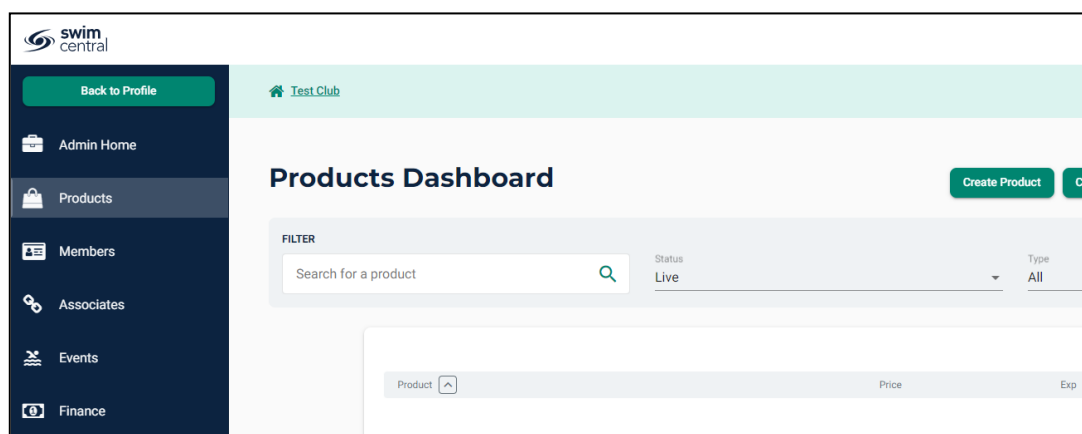
- **Availability Start and End Date**

This is the date your membership product is available in the Store to purchase (note this is different to the Discount dates)

**START DATE** - products are NOT to be available for purchase until 1 December

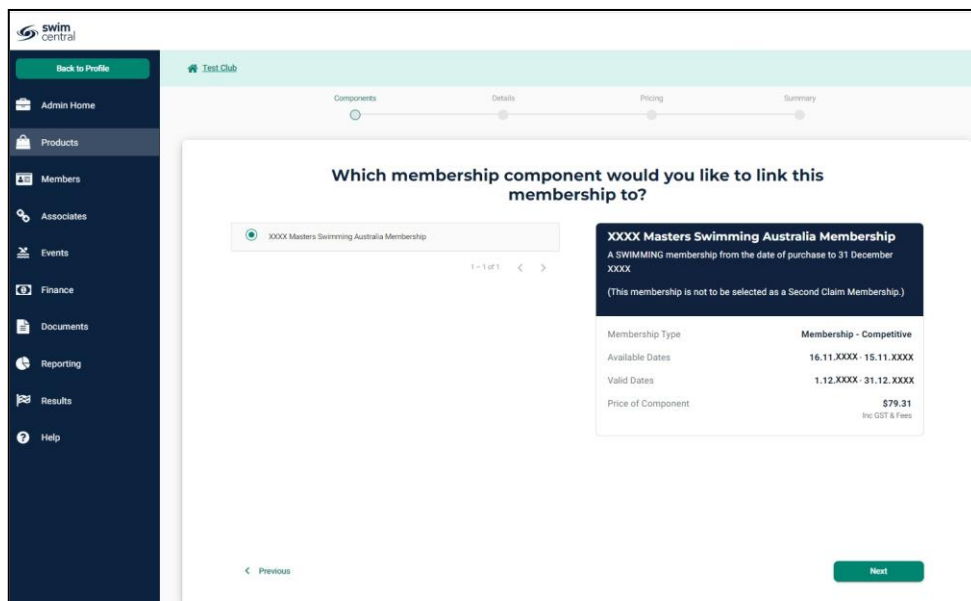
**END DATE** - MSA recommends making this date approx. 2 weeks before the following year’s Memberships open (1 December 2024) – so approximately the 15 November of the following year

**STEP 1:** Log into your Clubs Console on Swim Central and click on the *Products* menu, Click on the green *Create Product* button and the product you are wanting to create is a Membership – click on that button.



## HOW TO SET UP A STANDARD MEMBERSHIP AT CLUB LEVEL

**STEP 3:** You should now see all the 'Membership components' that have been made available to you by your Branch that you can select to create your membership product. Click on the **Swimming Membership** and you will see a pop up on the screen with the description of the product, **Click NEXT**



**STEP 4:** Now you can customise your product to suit your Club, add your Club fee and save to Draft so you can review it Notes that \* are required fields

### STEP 5:

#### *Under General Information*

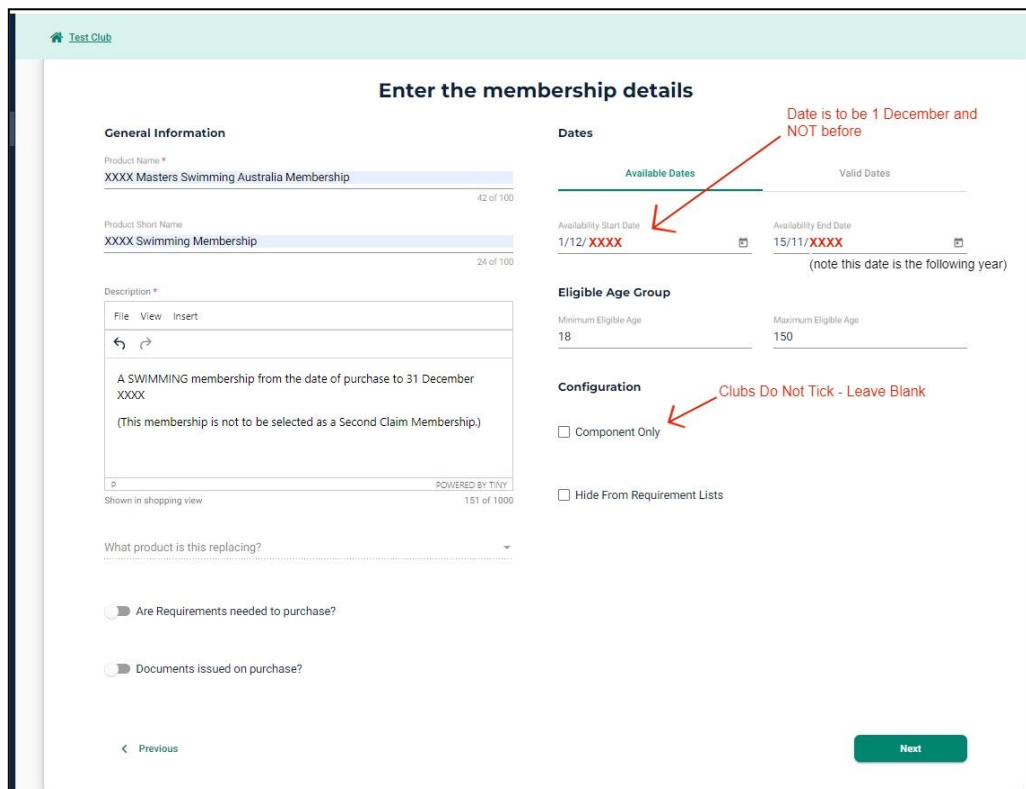
- **\* PRODUCT NAME:** As we are only creating one (1) standard membership product, MSA suggests no longer adding the term (12 month/6 month) to the description. MSA Recommends using the naming convention **XXXX Masters Swimming Australia Membership** (Note add the membership Year at the beginning)
- **PRODUCT SHORT NAME:** use the same as above.
- **\* DESCRIPTION:** here you can describe what product it is (i.e., you may have more than one membership type – youth, regional, early bird, over 80). It is recommended you add your Club name in here in the first line (there are 1000 characters to use) Note you can add your Club name in the description for easy identification.

### HOW TO SET UP A STANDARD MEMBERSHIP AT CLUB LEVEL

- **PRODUCT REPLACEMENT:** MSA currently recommends not to use this feature - we are trialling it with a few clubs
- **REQUIREMENTS TO PURCHASE:** only set if documents are required at purchase: MSA currently recommends not using this feature.
- **DOCUMENTS TO ISSUE:** only set if you wish to issue documents on purchase completion, MSA currently recommends not using this feature

#### Under Dates

- **AVAILABLE START AND AVAILABLE END DATES:** these are the dates when the membership product is available for purchase in the Store (Show in Catalogue) and you can edit these dates after publishing.
- **AVAILABLE START DATE** – enter 1/12/xxxx (1 December of the current year)
- **AVAILABLE END DATE** – MSA recommends making this date approx. 2 weeks before the following year’s Memberships 1 December opening date – so approximately the 15 November in the following year



**Enter the membership details**

**General Information**

Product Name \*  
XXXX Masters Swimming Australia Membership 42 of 100

Product Short Name  
XXXX Swimming Membership 24 of 100

Description \*  
A SWIMMING membership from the date of purchase to 31 December XXXX  
(This membership is not to be selected as a Second Claim Membership.)

What product is this replacing?

Are Requirements needed to purchase?

Documents issued on purchase?

**Dates**

Available Dates Valid Dates

Availability Start Date 1/12/XXXX Availability End Date 15/11/XXXX  
(note this date is the following year)

**Eligible Age Group**


Minimum Eligible Age 18 Maximum Eligible Age 150

**Configuration**

Component Only  
 Hide From Requirement Lists

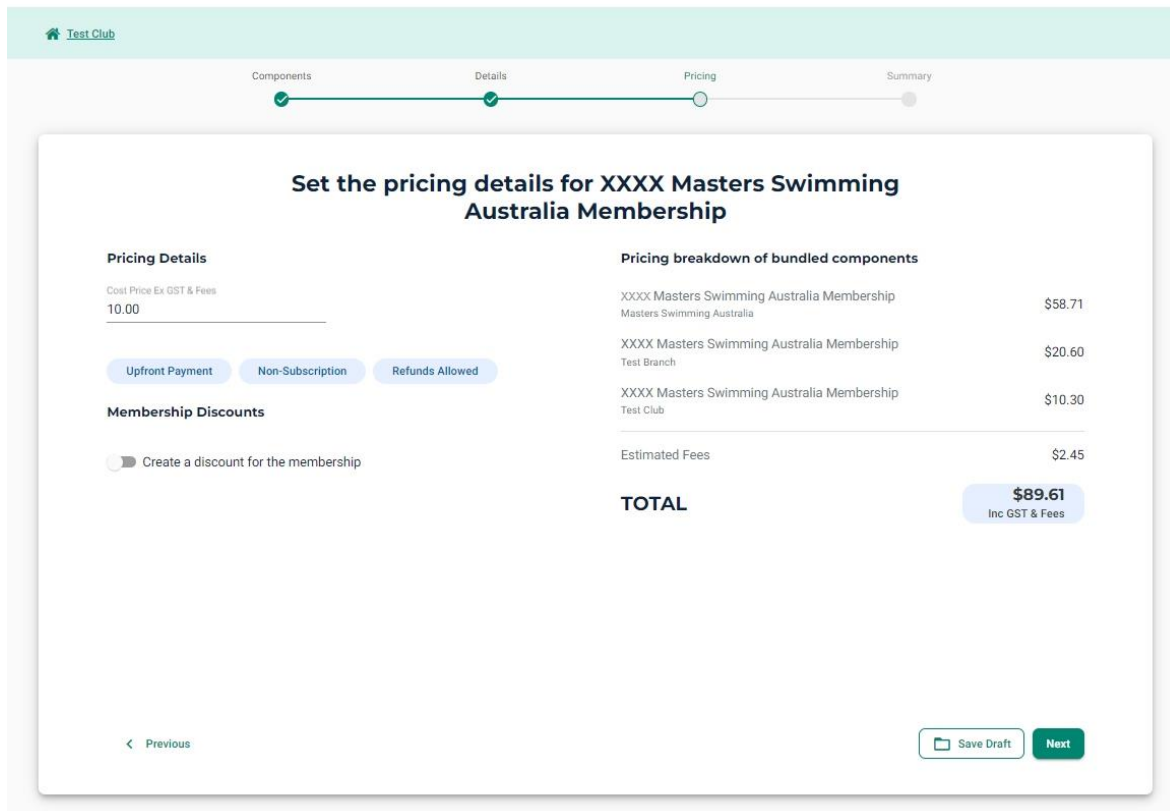
Next

### HOW TO SET UP A STANDARD MEMBERSHIP AT CLUB LEVEL

- **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 set by National to be 18 but you can change to 80 if your product is for members over the age of 80.
- **COMPONENT ONLY:** Clubs **DO NOT** tick this – leave this blank. 
- **HIDE FROM REQUIREMENTS:** leave unticked (for meet requirements)
- Click **NEXT**

#### STEP 6:

Enter your Club's membership fee under the *Pricing Details*. Your Club fee will auto calculate with the MSA National and your Branch fee. Under *Pricing breakdown of bundled components* on the right-hand side of the screen you will see the breakdown of the 3 membership components with a Total. The total includes GST and platform fees. Please note if your Club is registered for GST, you will see a blue GST tab under the Pricing Details.



The screenshot shows a web interface for setting pricing details for a membership. At the top, there is a progress bar with four steps: Components, Details, Pricing, and Summary. The 'Pricing' step is currently active. The main heading is 'Set the pricing details for XXXX Masters Swimming Australia Membership'. On the left, under 'Pricing Details', the 'Cost Price Ex GST & Fees' is set to 10.00. There are three toggle buttons: 'Upfront Payment' (checked), 'Non-Subscription' (unchecked), and 'Refunds Allowed' (checked). Below this is a 'Membership Discounts' section with a toggle for 'Create a discount for the membership' which is currently off. On the right, under 'Pricing breakdown of bundled components', there is a table with three rows: 'XXXX Masters Swimming Australia Membership Masters Swimming Australia' for \$58.71, 'XXXX Masters Swimming Australia Membership Test Branch' for \$20.60, and 'XXXX Masters Swimming Australia Membership Test Club' for \$10.30. Below the table, 'Estimated Fees' are listed as \$2.45. A large blue box at the bottom right shows the 'TOTAL' as '\$89.61 Inc GST & Fees'. At the bottom of the form, there are 'Previous' and 'Next' buttons, and a 'Save Draft' button.

### HOW TO SET UP A STANDARD MEMBERSHIP AT CLUB LEVEL

#### STEP 7:

You CANNOT DELETE a Published Product – MSA recommends saving it as a Draft to review. Once saved to Draft to locate it go to the *Products Dashboard* and change the *Product Status* filter to Draft.

#### STEP 8:

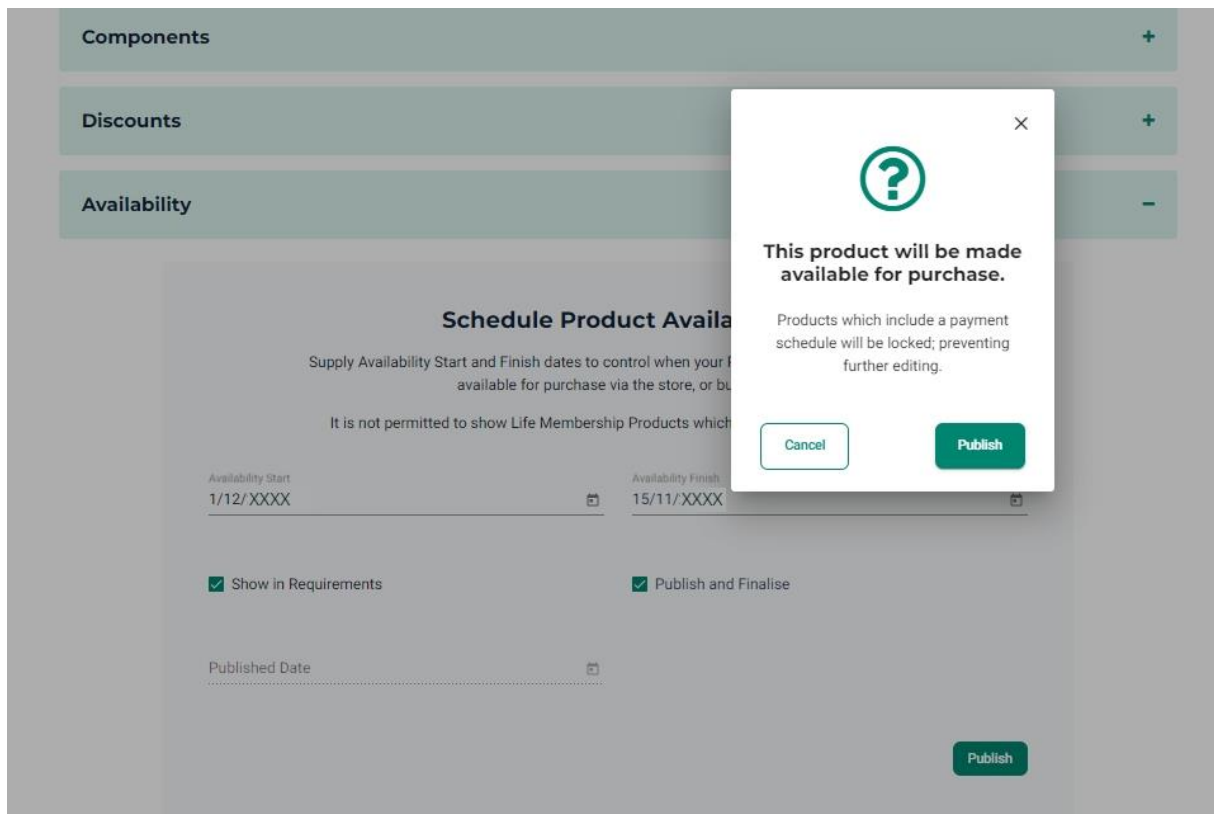
Before publishing click on the Draft Product and review the details on the summary page. If you need to amend, click Edit Product.

#### STEP 9:

Select Publish when you are ready to make the product Live in the Store (note it only becomes available from the **AVAILABLE START DATE which must be set to 1 December (NOT BEFORE)**.



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.



### HOW TO SET UP A STANDARD MEMBERSHIP AT CLUB LEVEL

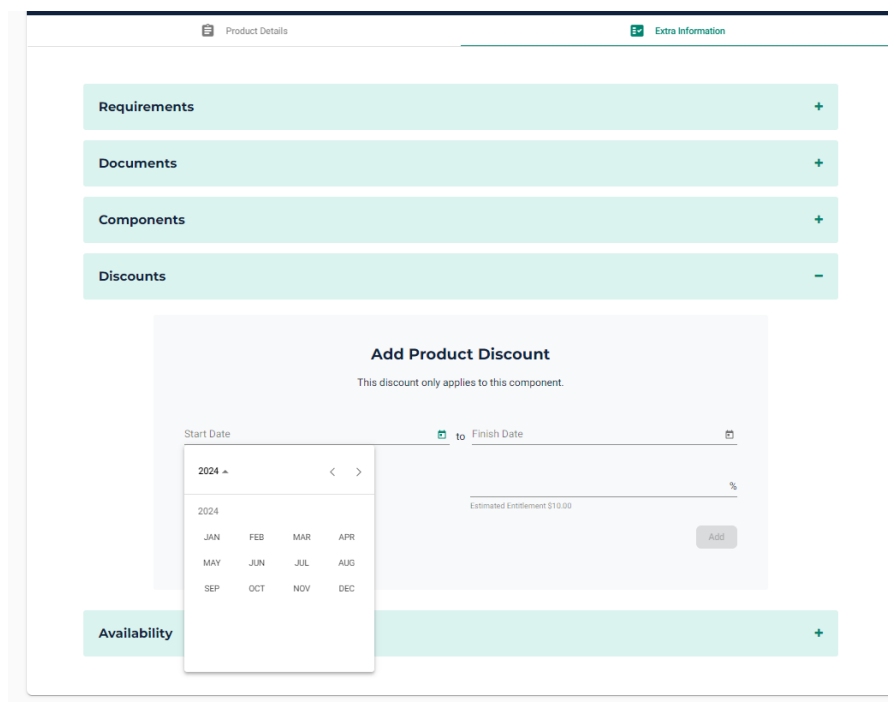
#### STEP 10:

Check whether your product is ready to be available for purchase from the 1 December. Go to the *Products Dashboard* and change the *Status* filter to Live and you will see what products are currently available in the Store to purchase. If your **Masters Swimming Australia Membership** is there you need to click on the product to update the Available Start Date to make sure it is 1 December. If you cannot see it under the Live filter change the *Status* filter to Active Not Live and you should see it listed there.

#### HOW TO APPLY A DISCOUNT

Click on Extra Information (this can be done before or after the product has been published)

- For a 6-month membership period the:
  - Discount START DATE** is 1 June (to match MSA, or 1 July, if preferred)
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- You can add the discount as either a percentage (%) or an amount (\$)
- Click Add



### HOW TO SET UP A STANDARD MEMBERSHIP AT CLUB LEVEL

- To remove a discount click on the green x

Discounts -

#### Add Product Discount

This discount only applies to this component.

Start Date  to Finish Date

Discount is Percentage \$

Estimated Entitlement \$51.82

Discount	Dates	
25%	1.XX.XXXX - 31.12.XXXX	ⓧ

### HOW TO EDIT THE AVAILABILITY OF LAST YEAR'S MEMBERSHIPS

You will want to remove the previous year's Swimmer memberships from the Store so no-one accidentally purchases them from the 1 December.

Click on the **Products Dashboard**. If you select Live under the Status tab you will see what products are currently available.

Click on the relevant membership product that you want to remove and top right of Product Details screen you can now select under Show Component to remove from Workflows (if unticked this product becomes Active not Live).

OR you can click on Extra Information tab, scroll down to the **Availability** tab, change the **Available Finish** date to today's date and untick the **Show in Workflow** and Save – this will now take the product out of the Store and make it Active Not Live so members can no longer purchase it.

To check click on the **Products Dashboard**. If you select Live under the Status tab you will see what products are currently available.

**Please do not hesitate to contact your Branch or the National Office if you need assistance or would like us to check your products.**