

## Training Manual



In the **Membership** section of BowlsLink you will be able to find all information related to the members of your club. The membership section is further divided into Membership Members, Groups & Categories, Certifications, Transfers and Exports.

You may view Webinar 1 on the [Bowls Victoria YouTube channel](#).

## Members

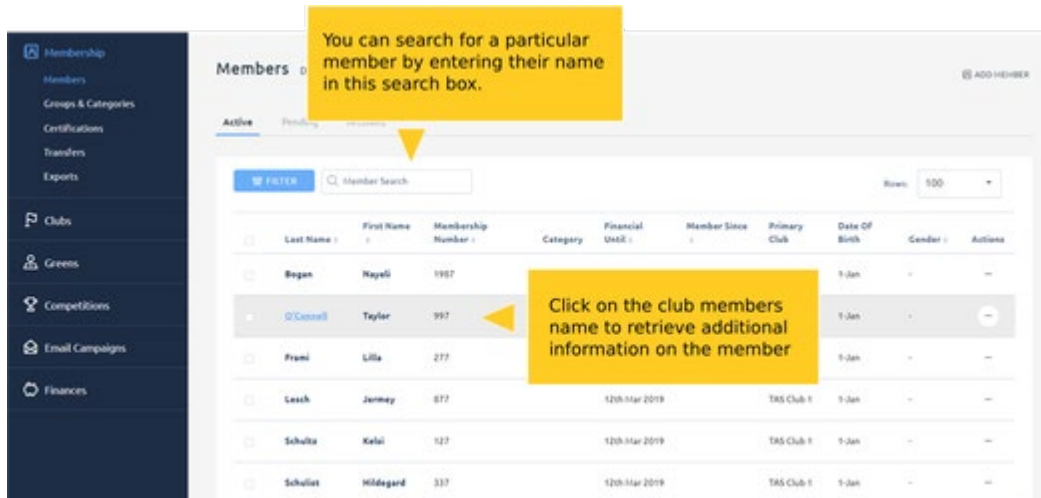
When you are in the **Members** section you will be provided with a list of all the members currently in your club.

The list is divided into three sections (tabs) - Active, Pending and Archived.

## Active Members

In the **Active** tab of your members list you will be able to perform the following actions:

1. You will be able to click onto the club members' name to retrieve additional information about this member.
2. You will be able to search for a particular member by name.



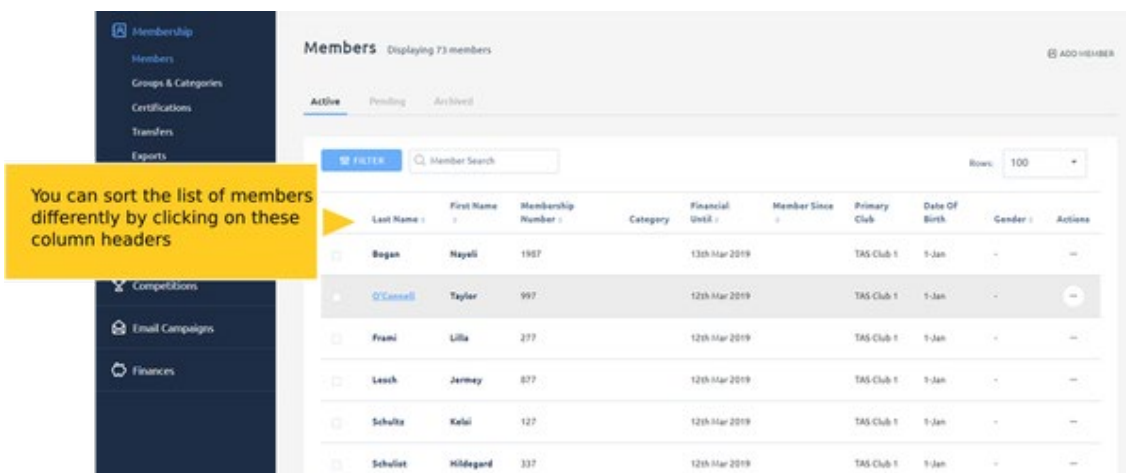
Members

Active Pending Archived

Filters Member Search Rows: 100

Last Name	First Name	Membership Number	Category	Financial Unit	Member Since	Primary Club	Date Of Birth	Gender	Actions
Began	Nayali	1987				TAS Club 1	1-Jan	-	
O'Connell	Taylor	997				TAS Club 1	1-Jan	-	
Frani	Lilla	277				TAS Club 1	1-Jan	-	
Lesch	Jemey	877		12th-Mar-2019		TAS Club 1	1-Jan	-	
Schultz	Kelii	127		12th-Mar-2019		TAS Club 1	1-Jan	-	
Schulst	Hildegard	337		12th-Mar-2019		TAS Club 1	1-Jan	-	

3. You will be able to sort the list of members differently by clicking on the different column headers.



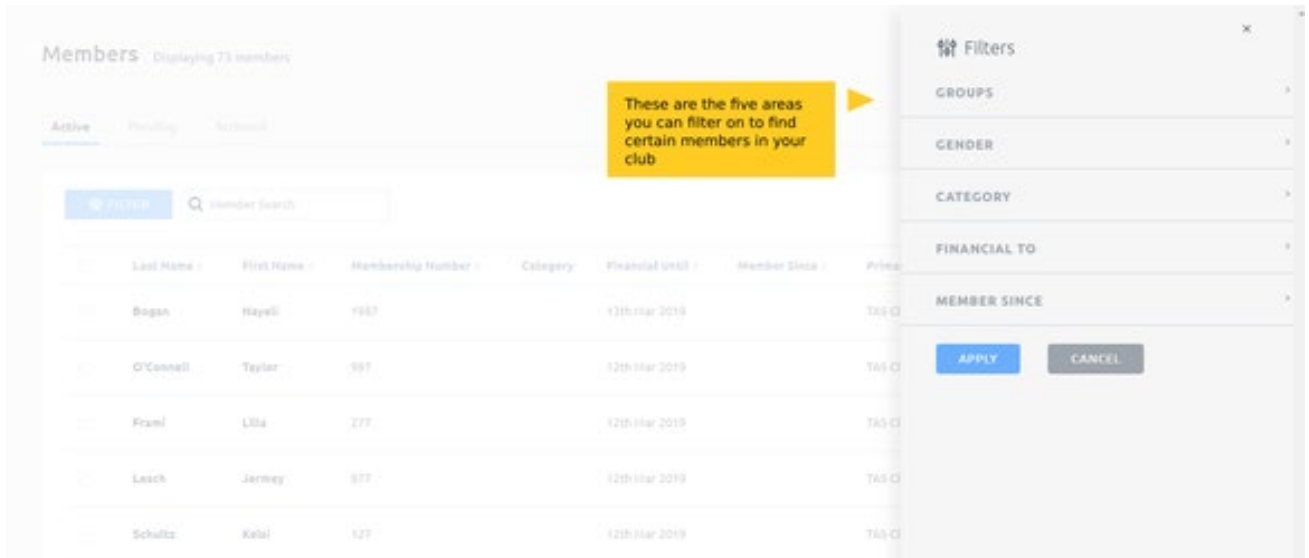
Members

Active Pending Archived

Filters Member Search Rows: 100

Last Name	First Name	Membership Number	Category	Financial Unit	Member Since	Primary Club	Date Of Birth	Gender	Actions
Began	Nayali	1987		13th-Mar-2019		TAS Club 1	1-Jan	-	
O'Connell	Taylor	997		12th-Mar-2019		TAS Club 1	1-Jan	-	
Frani	Lilla	277		12th-Mar-2019		TAS Club 1	1-Jan	-	
Lesch	Jemey	877		12th-Mar-2019		TAS Club 1	1-Jan	-	
Schultz	Kelii	127		12th-Mar-2019		TAS Club 1	1-Jan	-	
Schulst	Hildegard	337		12th-Mar-2019		TAS Club 1	1-Jan	-	

4. You will be able to apply specific filters to only find members matching your search criteria. You will be able to filter the following parameters:
1. Groups
  2. Gender
  3. Category
  4. Financial To
  5. Member Since



Members Displaying 73 members

Active Pending Archived

FILTER Member Search

Last Name	First Name	Membership Number	Category	Financial Until	Member Since	Price
Bogan	Nayeli	1987		13th Mar 2019		TAS Club
O'Connell	Taylor	997		12th Mar 2019		TAS Club
Framl	Lilla	277		12th Mar 2019		TAS Club
Lesch	Jerney	877		12th Mar 2019		TAS Club
Schultz	Kelal	127		12th Mar 2019		TAS Club

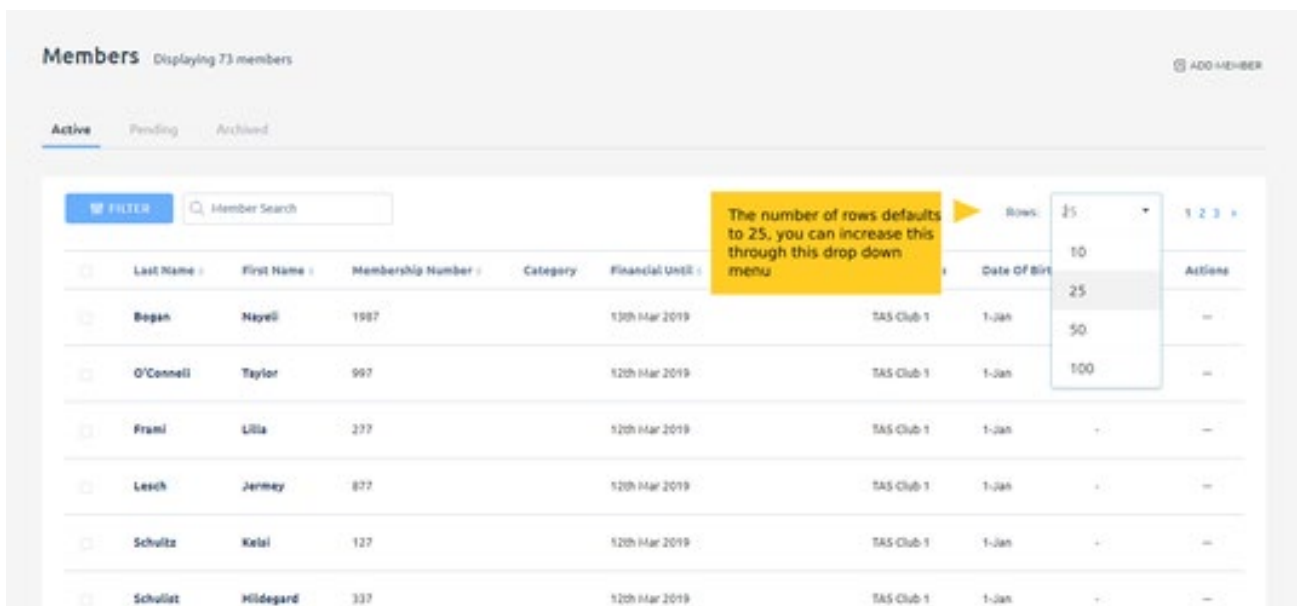
Filters

- GROUPS
- GENDER
- CATEGORY
- FINANCIAL TO
- MEMBER SINCE

APPLY CANCEL

These are the five areas you can filter on to find certain members in your club

5. You will be able to change the number of rows displayed in your member table.



Members Displaying 73 members

Active Pending Archived

ADD MEMBER

FILTER Member Search

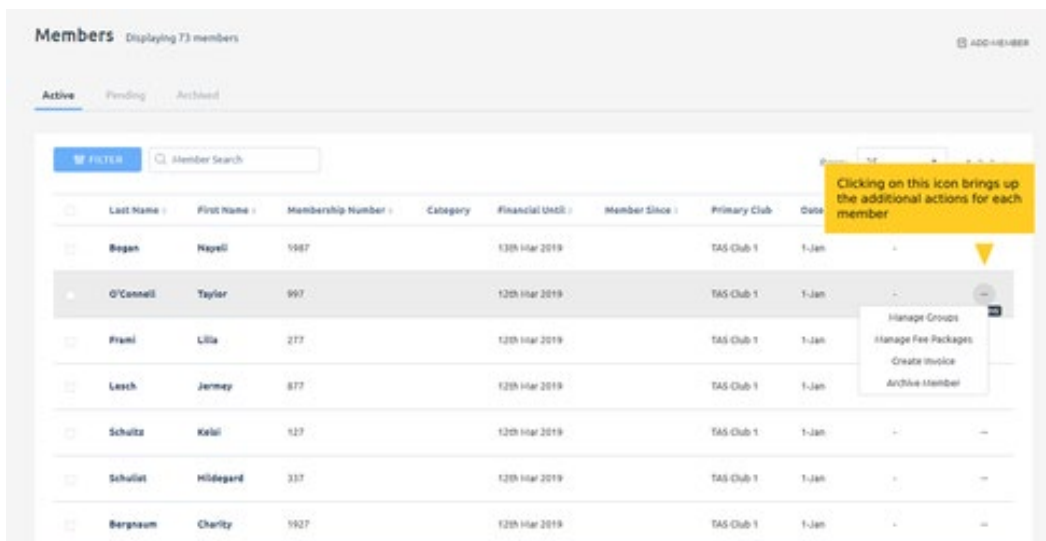
Rows: 25

Last Name	First Name	Membership Number	Category	Financial Until	Date Of Birth	Actions
Bogan	Nayeli	1987		13th Mar 2019	TAS Club 1 1-Jan	—
O'Connell	Taylor	997		12th Mar 2019	TAS Club 1 1-Jan	—
Framl	Lilla	277		12th Mar 2019	TAS Club 1 1-Jan	—
Lesch	Jerney	877		12th Mar 2019	TAS Club 1 1-Jan	—
Schultz	Kelal	127		12th Mar 2019	TAS Club 1 1-Jan	—
Schullat	Hildegard	337		12th Mar 2019	TAS Club 1 1-Jan	—

The number of rows defaults to 25, you can increase this through this drop down menu

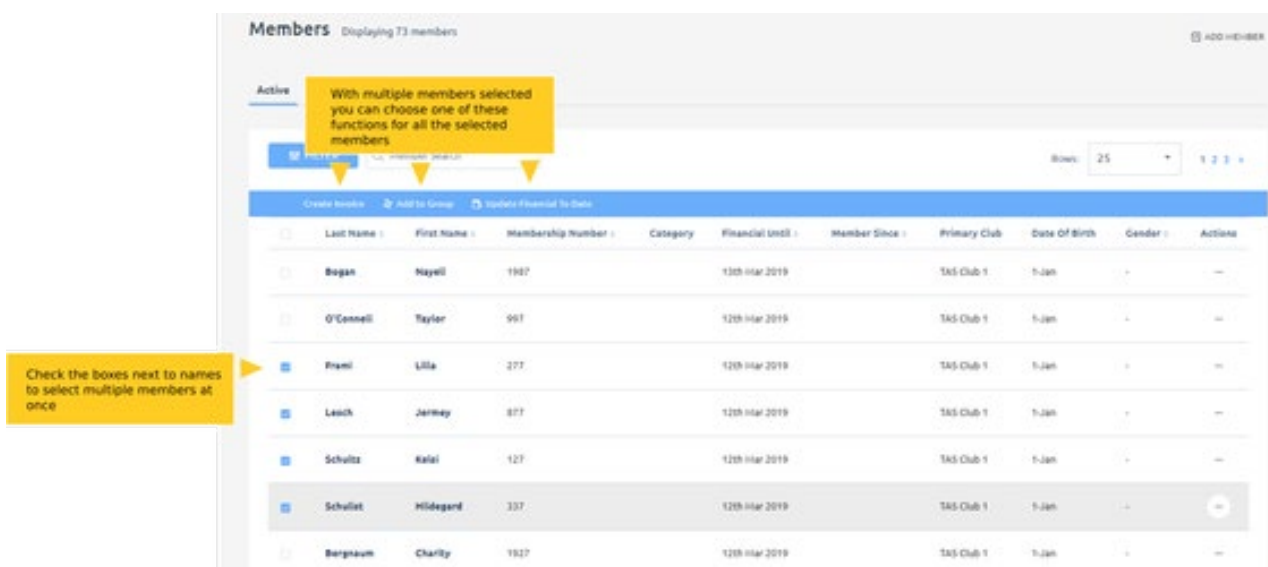
6. You will be able to perform additional actions for individual members.

1. **Manage Groups** - You will be able to add or remove the selected user from member groups that have been created.
2. **Manage Fee Packages** - You will be able to add or remove fee packages for the selected member. Please be aware that fee packages need to be created first before they can be assigned (Check Finance section for more details).
3. **Create Invoice** - You will be able to create an invoice for the selected member if they have been assigned the required fee package (refer to the Finance section for more details).
4. **Archive Member** - You will be able to archive a selected member.



7. You will be able to bulk select all or a select group of members to perform additional actions.

1. **Create invoice** - You will be able to create and send bulk invoices if the selected members have been assigned the required fees.
2. **Add to Group** - You will be able to add the selected members to a particular group that has already been created.
3. **Update the Financial To Date** - You will be able to update the financial membership date for multiple users to the same new date.

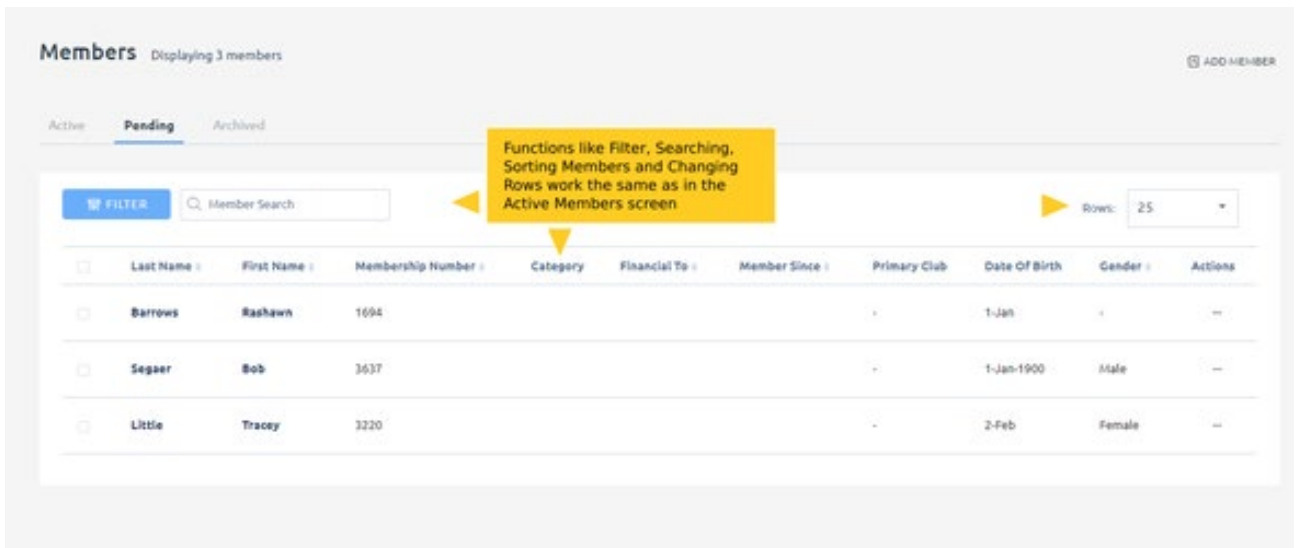


# MEMBERSHIP MODULE (WEBINAR 1)

## Pending Members

In the **Pending** tab of your members list you will be able to see all members that are currently pending review. Many functions work the same as in the **Active** members tab. There are two main actions you need to perform in this list:

1. **Approve Membership** - You will be able to approve the membership for the selected member.
2. **Deny Membership** - You will be able to deny the membership for the selected member.



Members Displaying 3 members ADD MEMBER

Active **Pending** Archived

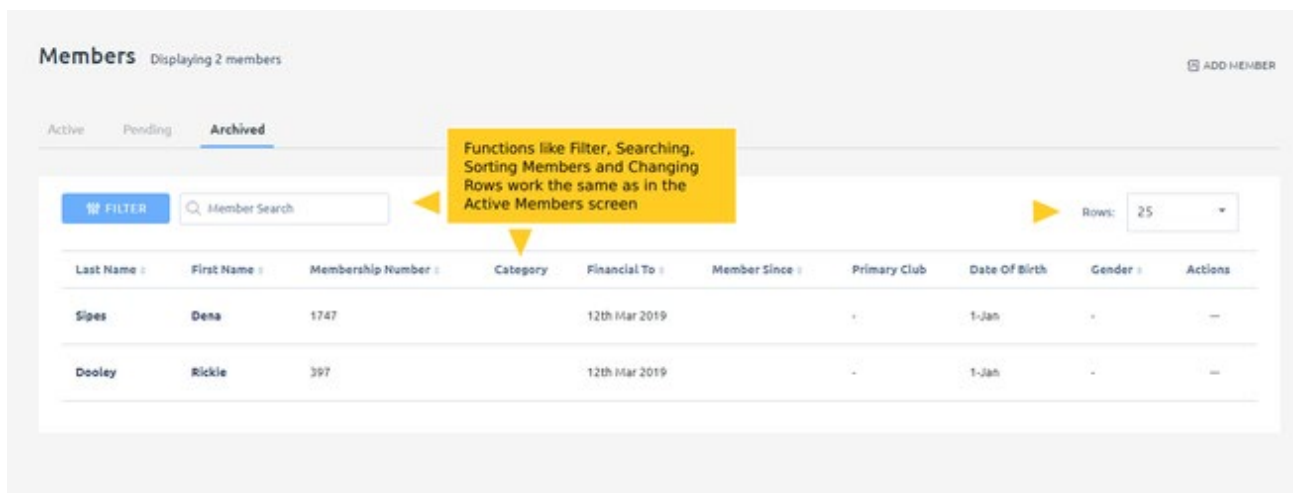
**FILTER** Member Search Rows: 25

<input type="checkbox"/>	Last Name	First Name	Membership Number	Category	Financial To	Member Since	Primary Club	Date Of Birth	Gender	Actions
<input type="checkbox"/>	Barrows	Rashawn	1694					1-Jan		—
<input type="checkbox"/>	Seager	Bob	3637					1-Jan-1900	Male	—
<input type="checkbox"/>	Little	Tracey	3220					2-Feb	Female	—

## Archived Members

In the **Archived** tab of your members list you will be able to see all members that are currently archived. Many functions work the same as in the **Active** members tab.

1. **UnArchive Member** - You will be able to unarchive the selected member and make them an active member of the club again.



Members Displaying 2 members ADD MEMBER

Active Pending **Archived**

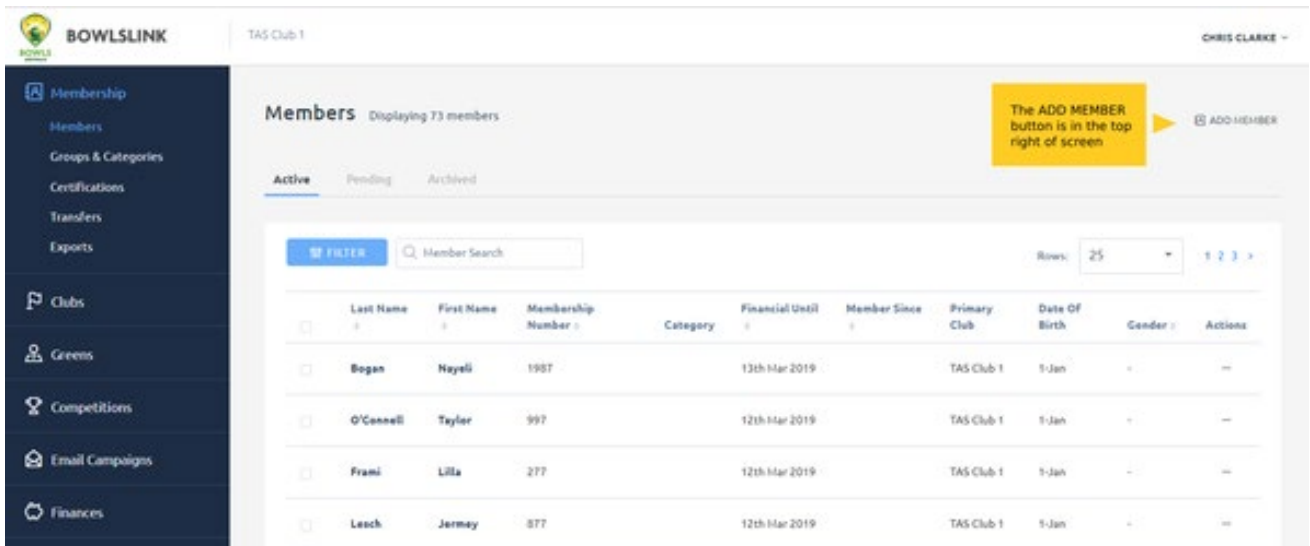
**FILTER** Member Search Rows: 25

<input type="checkbox"/>	Last Name	First Name	Membership Number	Category	Financial To	Member Since	Primary Club	Date Of Birth	Gender	Actions
<input type="checkbox"/>	Sipes	Dena	1747		12th Mar 2019			1-Jan		—
<input type="checkbox"/>	Dooley	Rickie	397		12th Mar 2019			1-Jan		—

## How to add a Member

When you click the "Add Member" button in the member overview you will be able to add a new member to your club by providing all the relevant information or alternatively you can also add an already existing member.

1. Select "Add Member"



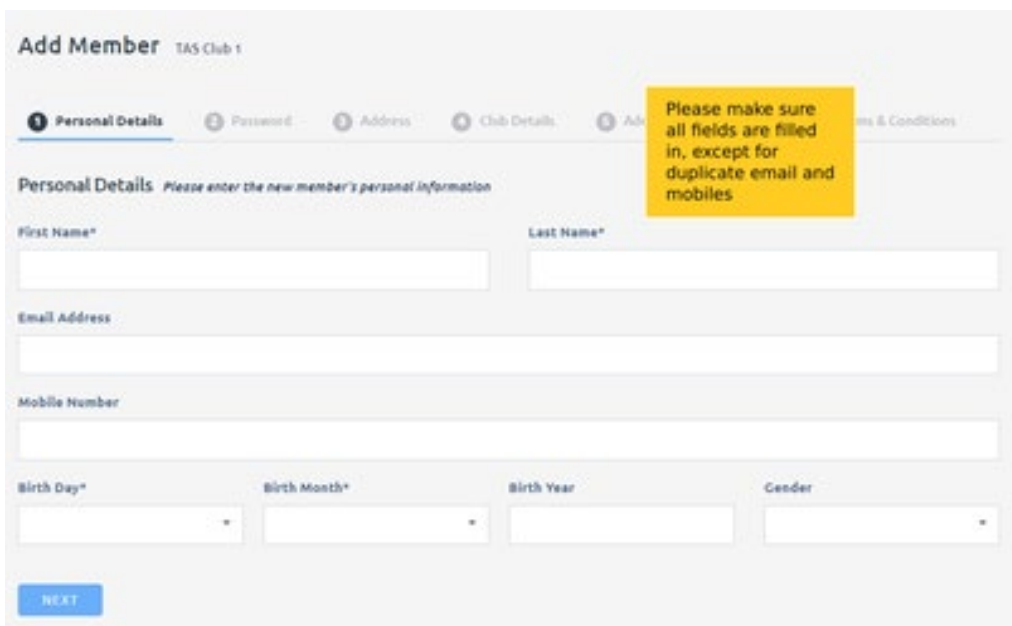
The screenshot shows the 'Members' page in the BowlsLink system. The page title is 'Members' and it indicates 'Displaying 73 members'. There are tabs for 'Active', 'Pending', and 'Archived'. A search bar is present with the text 'Member Search'. A table lists several members with their details. A yellow callout box highlights the 'ADD MEMBER' button in the top right corner.

	Last Name	First Name	Membership Number	Category	Financial Until	Member Since	Primary Club	Date Of Birth	Gender	Actions
<input type="checkbox"/>	Bogan	Nayeli	1987		13th Mar 2019		TAS Club 1	1-Jan	-	—
<input type="checkbox"/>	O'Connell	Taylor	997		12th Mar 2019		TAS Club 1	1-Jan	-	—
<input type="checkbox"/>	Frami	Lilla	277		12th Mar 2019		TAS Club 1	1-Jan	-	—
<input type="checkbox"/>	Leach	Jerney	877		12th Mar 2019		TAS Club 1	1-Jan	-	—

2. You will then be asked to provide personal details for the new member.  
Please enter the new member's personal information:

1. Last Name
2. Email Address
3. Mobile Number
4. DOB
5. Gender

**Note:** The email and mobile phone number entered here are both the sign-in and contact details for the member. These details need to be unique, and two members cannot have the same email address.



The screenshot shows the 'Add Member' form in the BowlsLink system. The form is titled 'Add Member' and is for 'TAS Club 1'. It has a progress bar with steps: 1 Personal Details, 2 Password, 3 Address, 4 Club Details, 5 Add Existing Member, and 6 Terms & Conditions. The 'Personal Details' step is active. A yellow callout box says 'Please make sure all fields are filled in, except for duplicate email and mobiles'.

**Personal Details** Please enter the new member's personal information

First Name\*

Last Name\*

Email Address

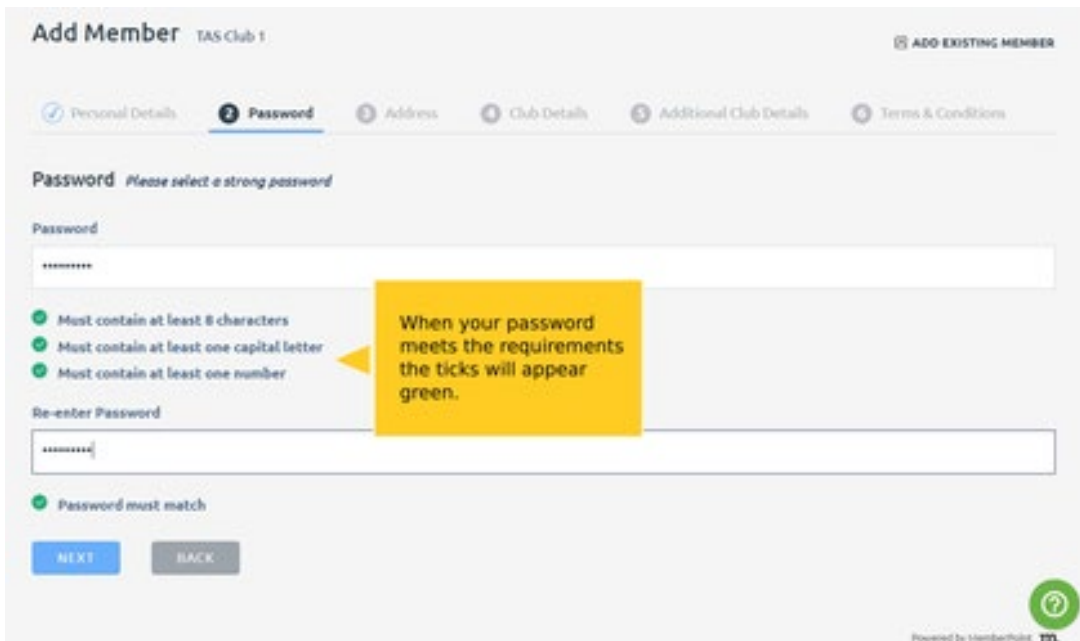
Mobile Number

Birth Day\* Birth Month\* Birth Year Gender

Next

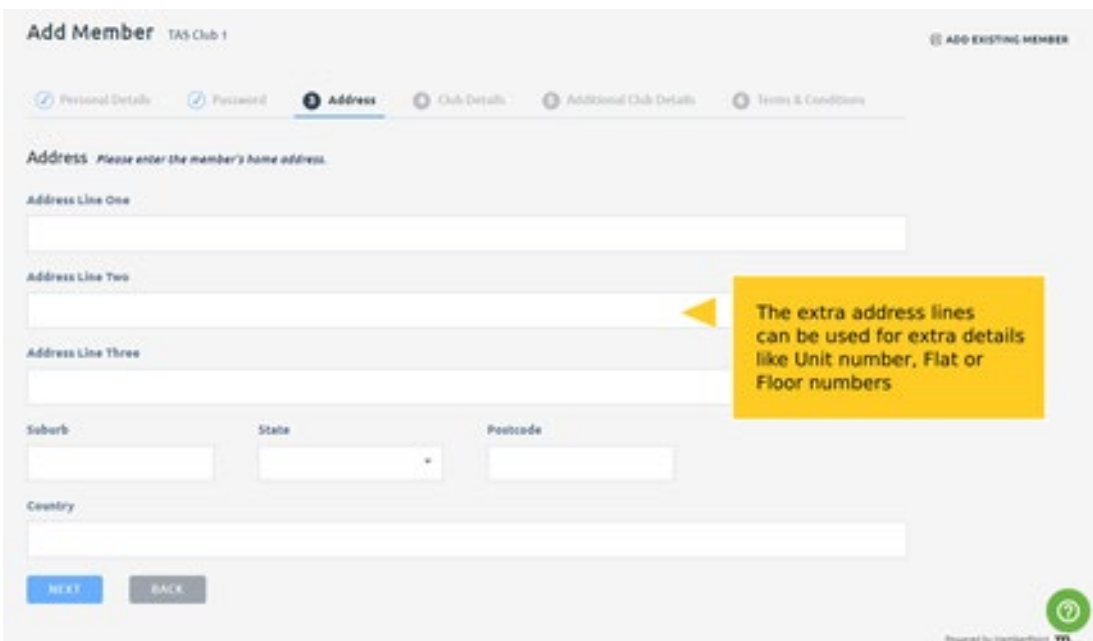
# MEMBERSHIP MODULE (WEBINAR 1)

3. Next you will be asked to create a password. Please select a strong password.
  1. Your password needs to fulfill certain requirements to be considered strong.
  2. When you re-enter your password it needs to match your initial password.



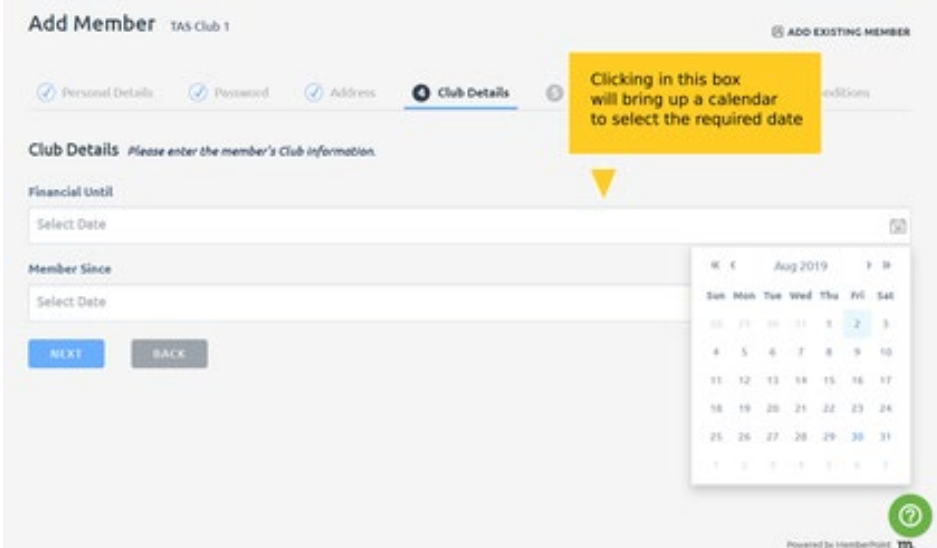
The screenshot shows the 'Add Member' form for 'TAS Club 1'. The 'Password' step is active, indicated by a blue underline. The form includes a 'Password' field with a masked input, a 'Re-enter Password' field, and a list of requirements: 'Must contain at least 8 characters', 'Must contain at least one capital letter', and 'Must contain at least one number'. All three requirements have green checkmarks. A yellow callout box points to the requirements, stating: 'When your password meets the requirements the ticks will appear green.' Below the fields are 'NEXT' and 'BACK' buttons. A green help icon is in the bottom right corner.

4. Once you have set up a password you will be required to enter the new member's address details. Please enter the member's home address.
  1. Address Lines
  2. Suburb
  3. State
  4. Postcode
  5. Country

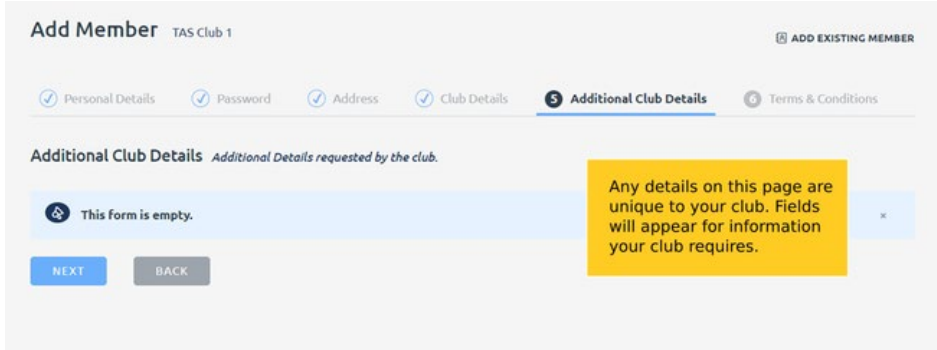


The screenshot shows the 'Add Member' form for 'TAS Club 1'. The 'Address' step is active, indicated by a blue underline. The form includes three 'Address Line' fields (One, Two, Three), 'Suburb', 'State', 'Postcode', and 'Country' fields. A yellow callout box points to the 'Address Line Two' field, stating: 'The extra address lines can be used for extra details like Unit number, Flat or Floor numbers.' Below the fields are 'NEXT' and 'BACK' buttons. A green help icon is in the bottom right corner.

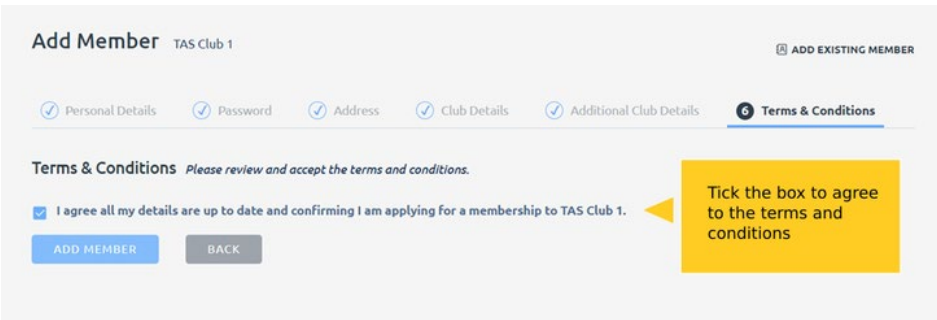
5. The fourth step is to provide club details for the new member. This information will be helpful when it is necessary to create invoices against a member. Please enter the member's Club information.
1. Financial Until
  2. Member Since



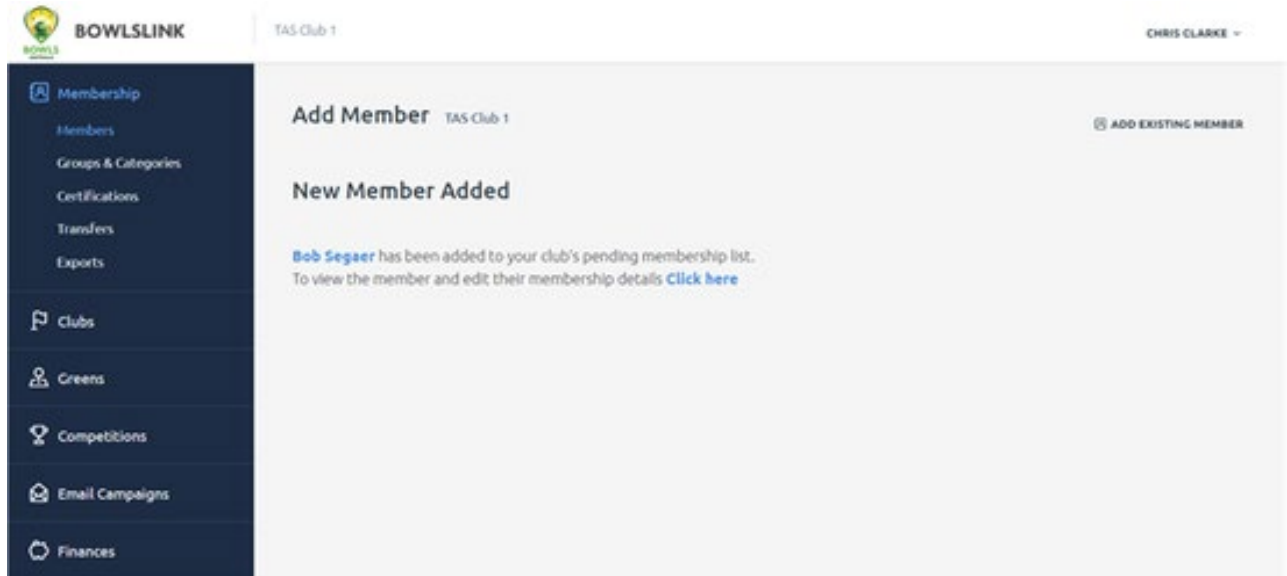
6. Should any additional club details be required, this can be provided in this step after providing the member's club details.



7. In the last step you need to confirm that you have permission to add a new member to your club. Once confirmed you will be able to add the member to your club.



- If you have provided all details correctly you will receive a notification confirming the new member. If some details are already in the system (e.g. mobile number or email) the system will bring up an error message. This usually indicates that a member already exists.

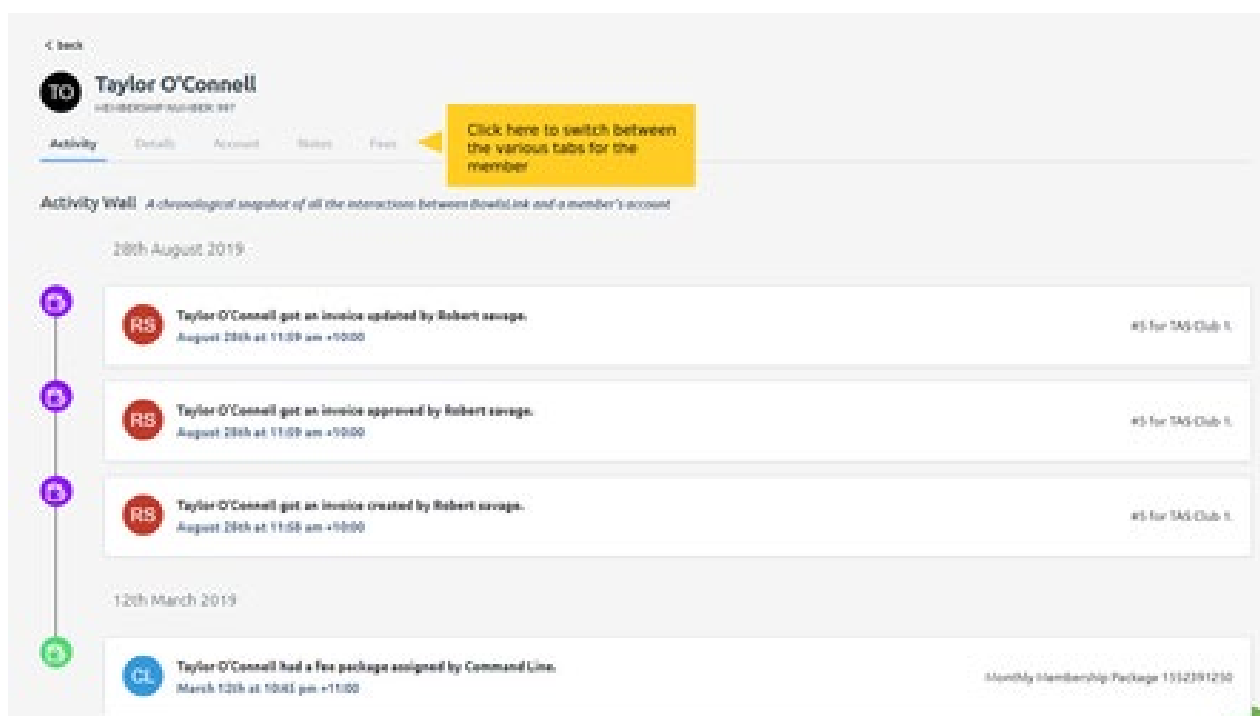


## Edit an Existing Members' details

If you click on a member in your member list, you will see a detailed view of the member. You will be able to retrieve additional information about the member as well as being able to perform additional administrative actions.

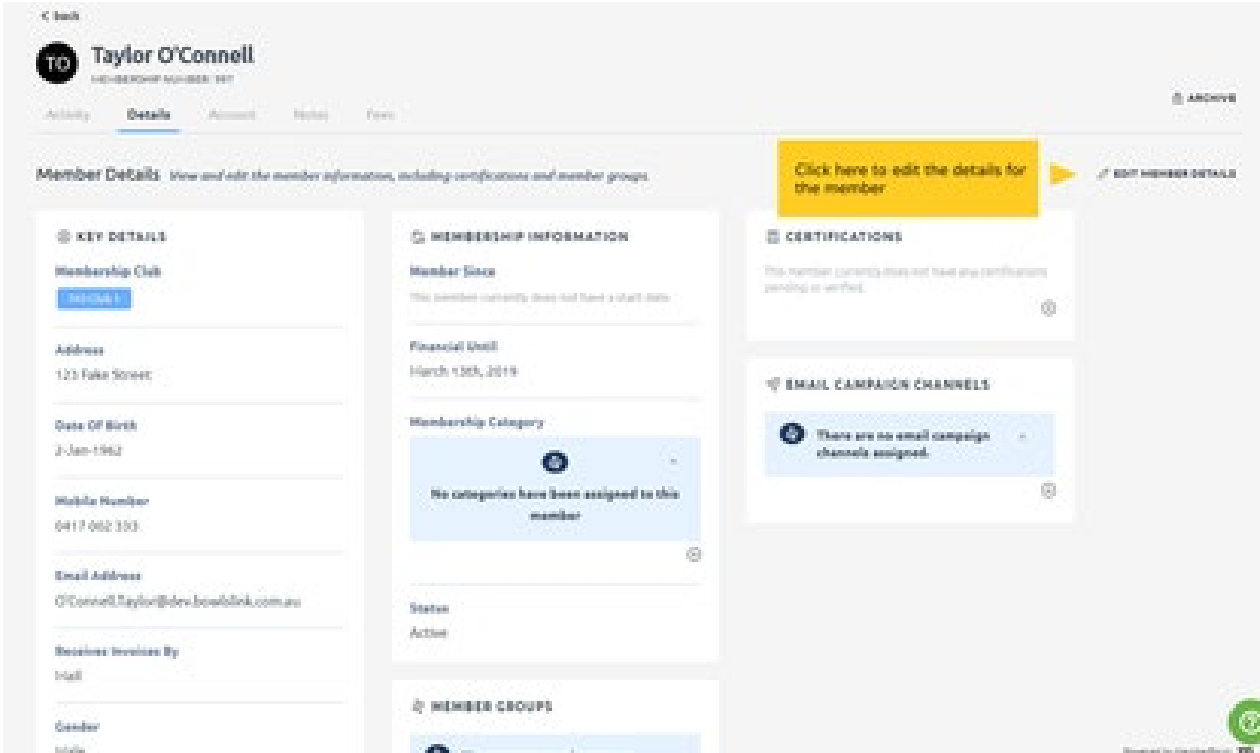
The detailed member profile is divided into five sections (tabs) - activity, details, account, notes and fees.

- The first tab is the **Activity** tab where you will be able to see any activity against a members' profile.





2. The second tab is the **Details** tab where you will find most of your member's information.



← back

**TO Taylor O'Connell**  
MEMBERSHIP NUMBER: 107

Activity **Details** Account Notes Forms ARCHIVE

**Member Details:** View and edit the member information, including certifications and member groups. Click here to edit the details for the member → **EDIT MEMBER DETAILS**

**KEY DETAILS**

**Membership Club**  
[View Club](#)

**Address**  
123 Fake Street

**Date Of Birth**  
2-Jan-1962

**Mobile Number**  
0417 002 333

**Email Address**  
O'Connell.Taylor@dev.bowlslink.com.au

**Receive Invoices By**  
Mail

**Gender**  
Male

**MEMBERSHIP INFORMATION**

**Member Since**  
This member currently does not have a start date.

**Financial Start**  
March 13th, 2019

**Membership Category**  
No categories have been assigned to this member.

**Status**  
Active

**MEMBER GROUPS**  
There are no member groups.

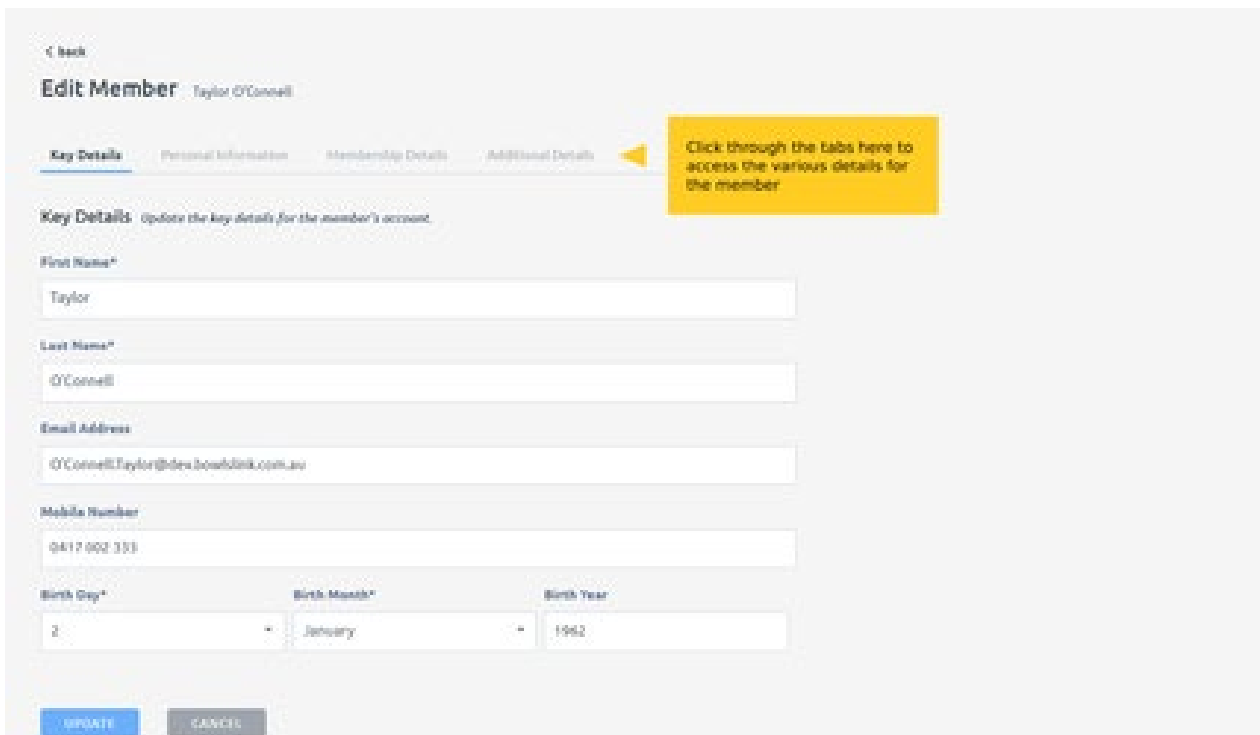
**CERTIFICATIONS**  
This member currently does not have any certifications pending or verified.

**EMAIL CAMPAIGN CHANNELS**  
There are no email campaign channels assigned.

Powered by BowlsLink™

Click **Edit Member Details** and you will be able to edit:

1. Key Details
2. Personal Information
3. Membership Details
4. Additional Details



← back

**Edit Member** Taylor O'Connell

**Key Details** Personal Information Membership Details Additional Details Click through the tabs here to access the various details for the member

**Key Details:** Update the key details for the member's account.

**First Name\***  
Taylor

**Last Name\***  
O'Connell

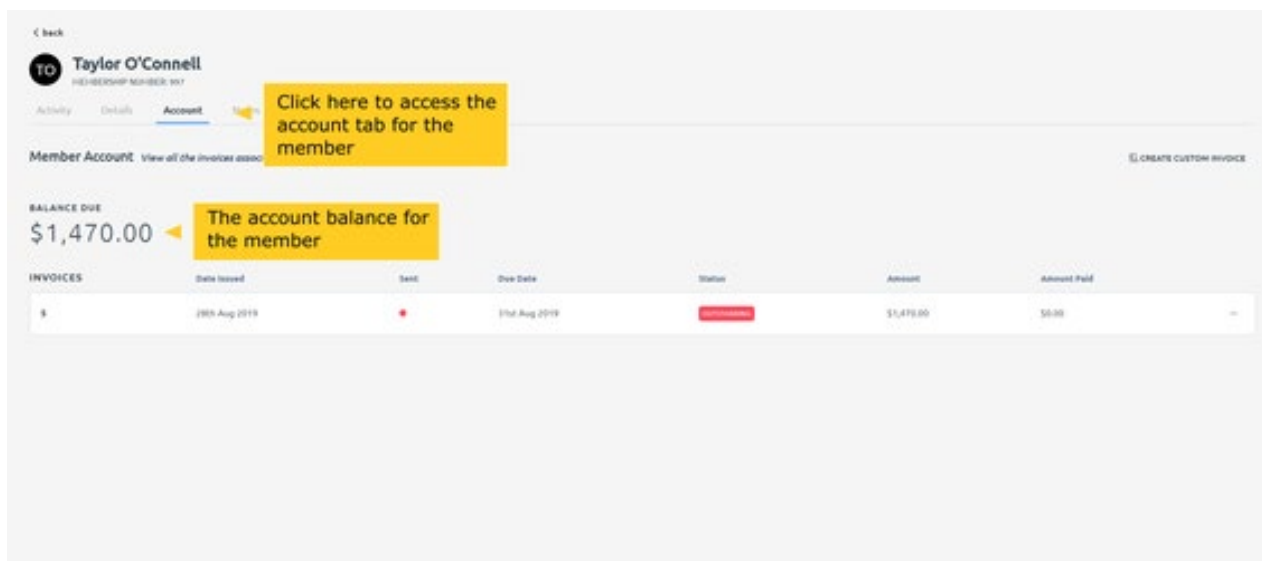
**Email Address**  
O'Connell.Taylor@dev.bowlslink.com.au

**Mobile Number**  
0417 002 333

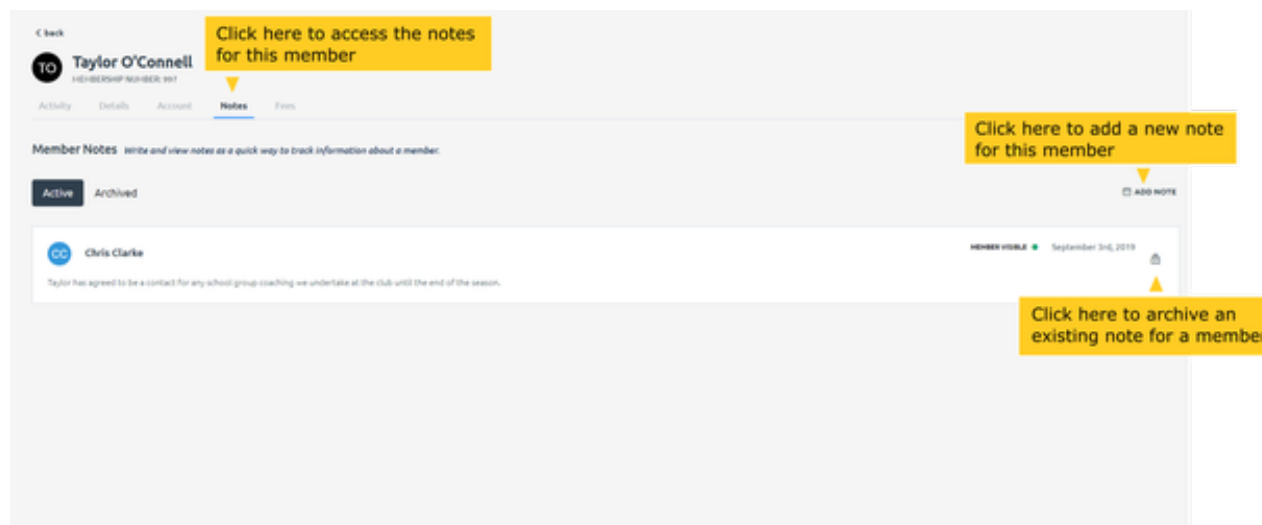
**Birth Day\***    **Birth Month\***    **Birth Year**  
2    January    1962

**UPDATE** **CANCEL**

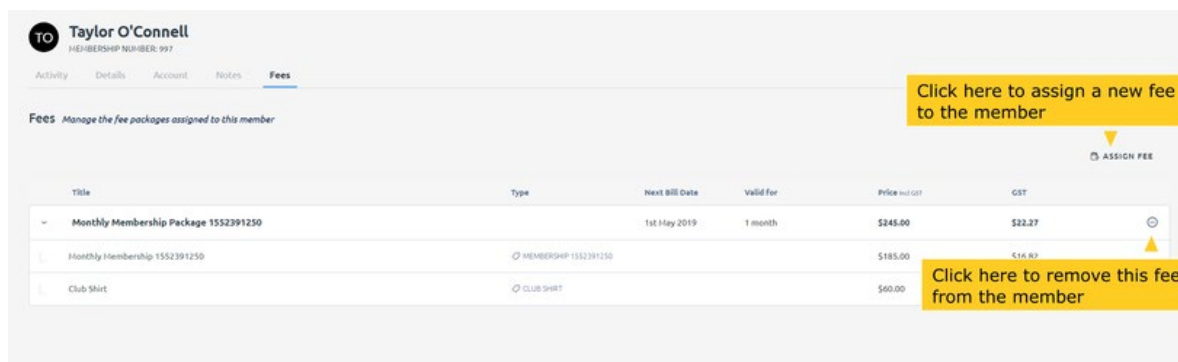
- The third tab is the **Account** tab where you will be able to view all the invoices associated to this particular member.



- The fourth tab is the **Notes** tab where you will be able to write and view notes as a quick way to track information about a member.

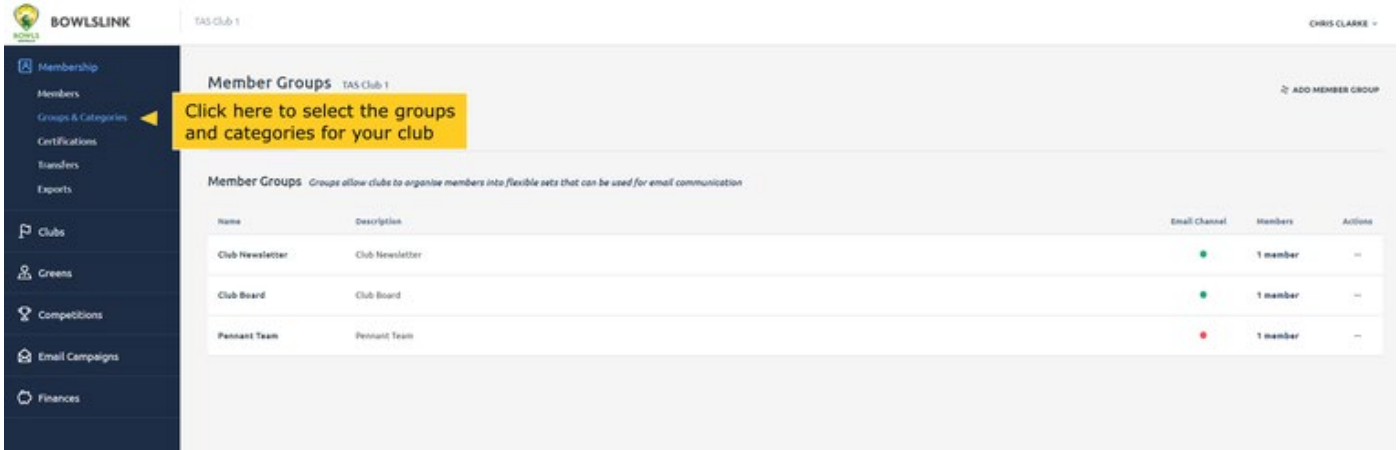


- The last tab is the **Fees** tab where you will be able to see all allocated fees the member has to pay to the club.



## Groups & Categories

When you are in the **Groups & Categories** section you will be provided with a list of all the groups and categories you have already created for your club.



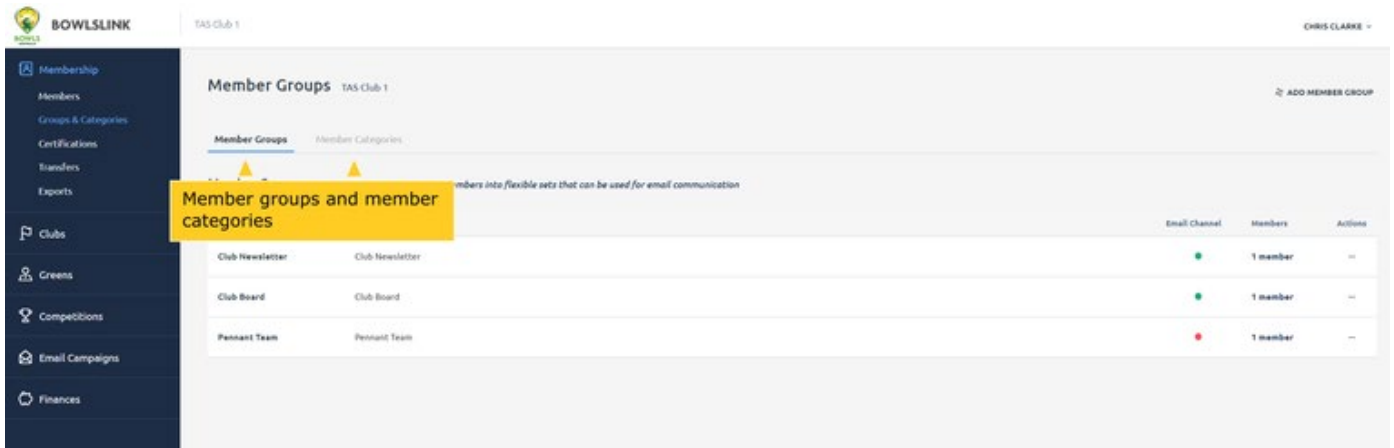
**Member Groups** TAS Club 1 CHRIS CLARKE ▾

[+ ADD MEMBER GROUP](#)

**Member Groups** Groups allow clubs to organise members into flexible sets that can be used for email communication

Name	Description	Email Channel	Members	Actions
Club Newsletter	Club Newsletter	●	1 member	⋮
Club Board	Club Board	●	1 member	⋮
Pennant Team	Pennant Team	●	1 member	⋮

The list is divided into two sections (tabs) - Member Groups and Member Categories.



**Member Groups** TAS Club 1 CHRIS CLARKE ▾

[+ ADD MEMBER GROUP](#)

**Member Groups** Groups allow clubs to organise members into flexible sets that can be used for email communication

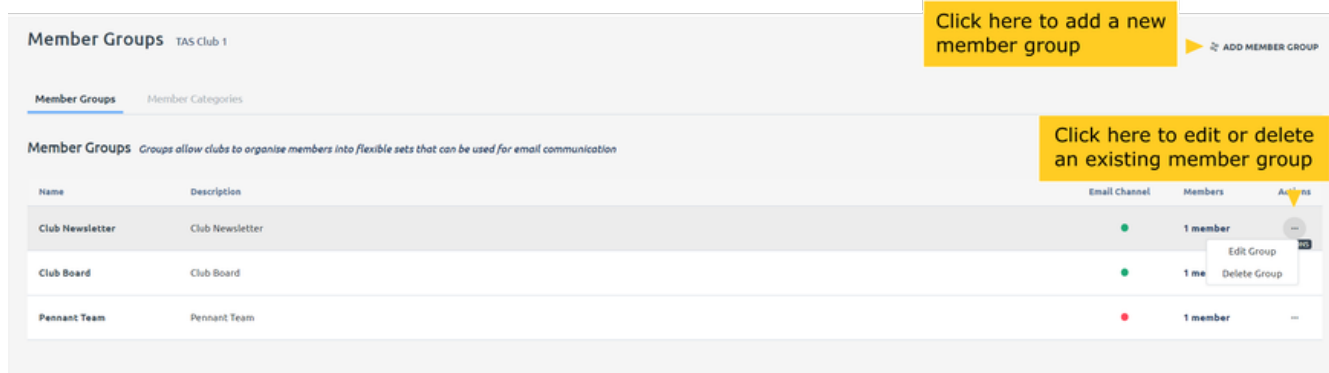
**Member groups and member categories**

Name	Description	Email Channel	Members	Actions
Club Newsletter	Club Newsletter	●	1 member	⋮
Club Board	Club Board	●	1 member	⋮
Pennant Team	Pennant Team	●	1 member	⋮

## Member Groups

In the **Member Groups** tab of your list you will be able to see all member groups that have already been created. You will also be given an overview of some of the groups' details. Furthermore, you will be able to perform the following actions:

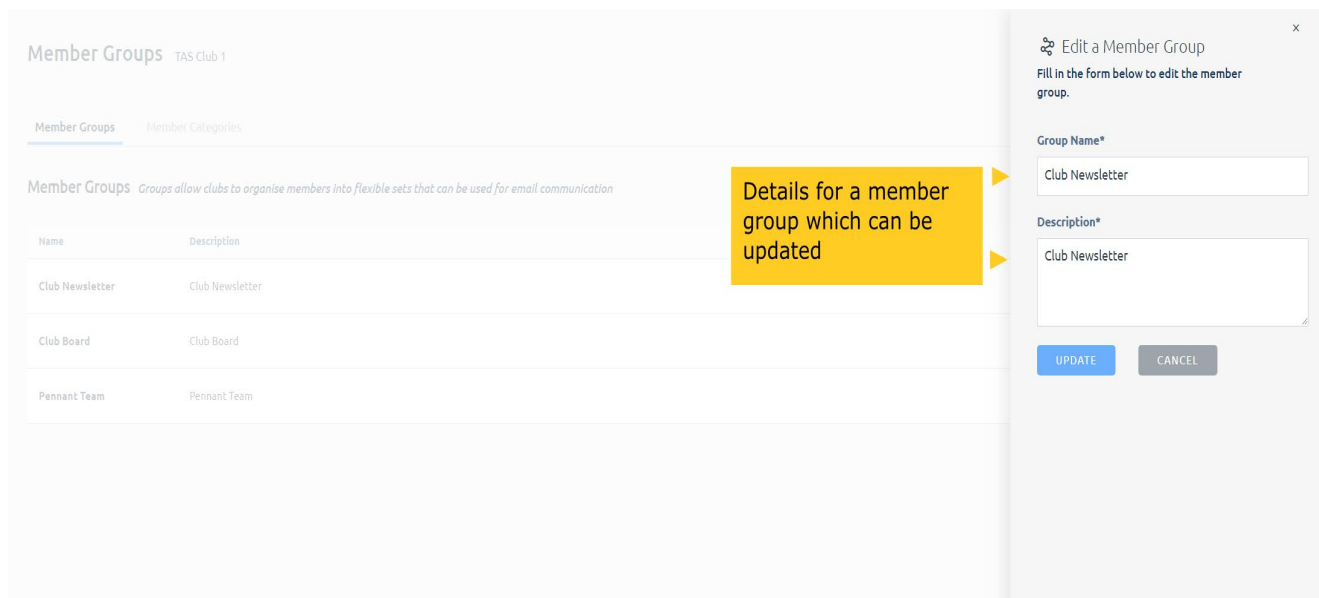
1. You will be able to add new member groups.
2. You will be able to edit or delete existing member groups (**Attention:** Groups can only be deleted when no members are associated to this category).



The screenshot shows the 'Member Groups' interface for 'TAS Club 1'. At the top right, a yellow callout box says 'Click here to add a new member group' with an arrow pointing to the 'ADD MEMBER GROUP' button. Below the table, another yellow callout box says 'Click here to edit or delete an existing member group' with an arrow pointing to the 'Edit Group' and 'Delete Group' options in the 'Actions' column of the 'Club Newsletter' row.

Name	Description	Email Channel	Members	Actions
Club Newsletter	Club Newsletter	●	1 member	⋮ Edit Group Delete Group
Club Board	Club Board	●	1 me	⋮
Pennant Team	Pennant Team	●	1 member	⋮

3. Details that can be edited for a member group



The screenshot shows the 'Member Groups' interface with an 'Edit a Member Group' modal open. A yellow callout box points to the modal with the text 'Details for a member group which can be updated'. The modal contains the following fields:

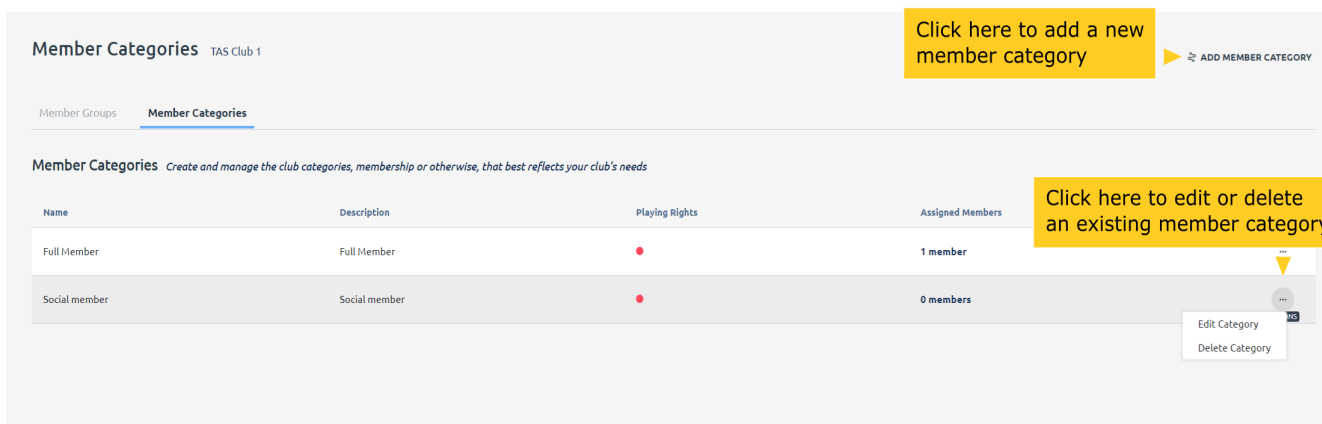
- Group Name\*: Club Newsletter
- Description\*: Club Newsletter

Buttons for 'UPDATE' and 'CANCEL' are visible at the bottom of the modal.

## Member Categories

In the **Member Categories** tab of your list you will be able to see all member categories that have already been created. You will also be given an overview of some of the categories' details. Furthermore, you will be able to perform the following actions:

1. You will be able to add new member categories.
2. You will be able to edit or delete existing member categories (**Attention:** Categories can only be deleted when no members are associated to this category).



Member Categories TAS Club 1

Click here to add a new member category ➔ ADD MEMBER CATEGORY

Member Groups **Member Categories**

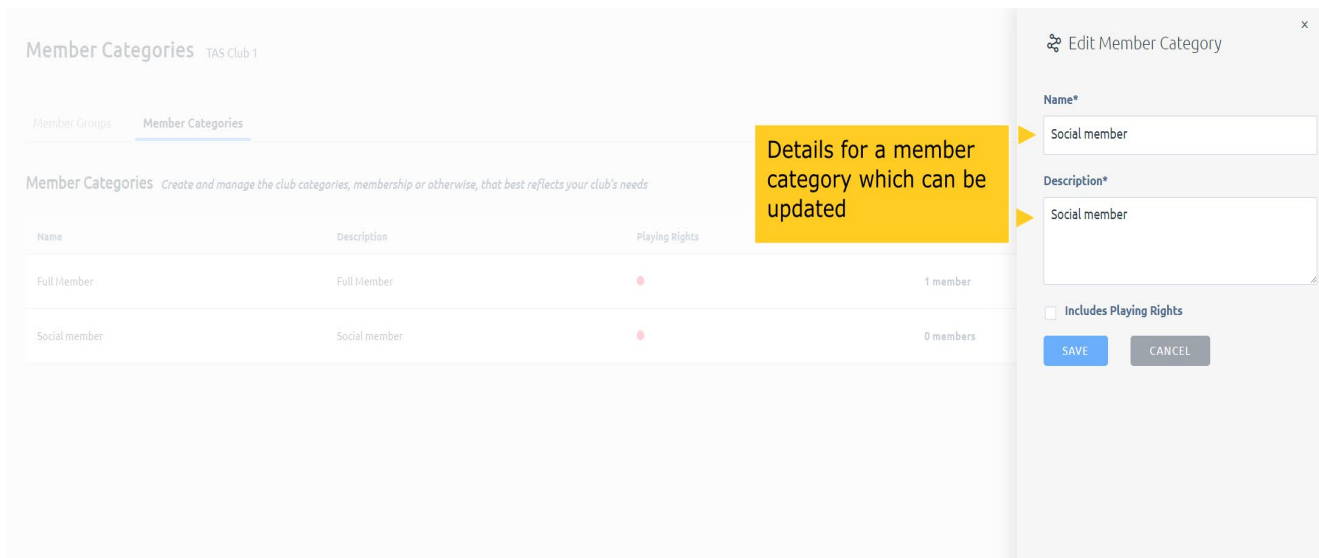
Member Categories *Create and manage the club categories, membership or otherwise, that best reflects your club's needs*

Name	Description	Playing Rights	Assigned Members
Full Member	Full Member	●	1 member
Social member	Social member	●	0 members

Click here to edit or delete an existing member category

Edit Category  
Delete Category

3. Details that can be edited for a member category



Member Categories TAS Club 1

Member Groups **Member Categories**

Member Categories *Create and manage the club categories, membership or otherwise, that best reflects your club's needs*

Name	Description	Playing Rights	Assigned Members
Full Member	Full Member	●	1 member
Social member	Social member	●	0 members

Details for a member category which can be updated

**Edit Member Category** ✕

Name\*  
Social member

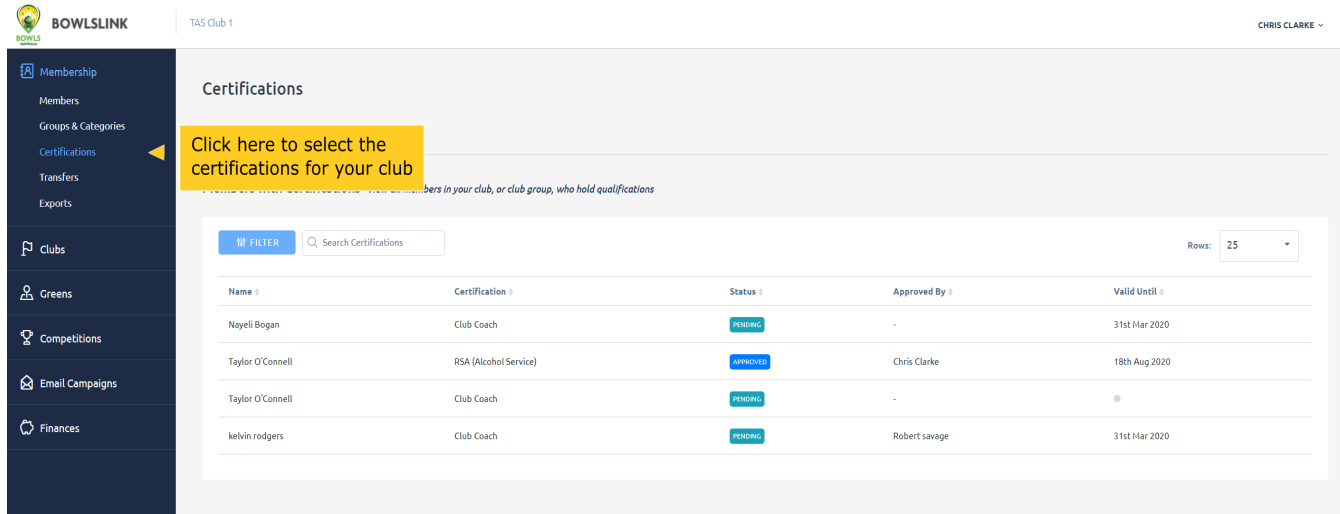
Description\*  
Social member

Includes Playing Rights

SAVE CANCEL

## Certifications

When you are in the certifications section you will be provided with a list of all the members currently holding a certification in your club.



**BOWLSLINK** TAS Club 1 CHRIS CLARKE ▾

**Certifications**

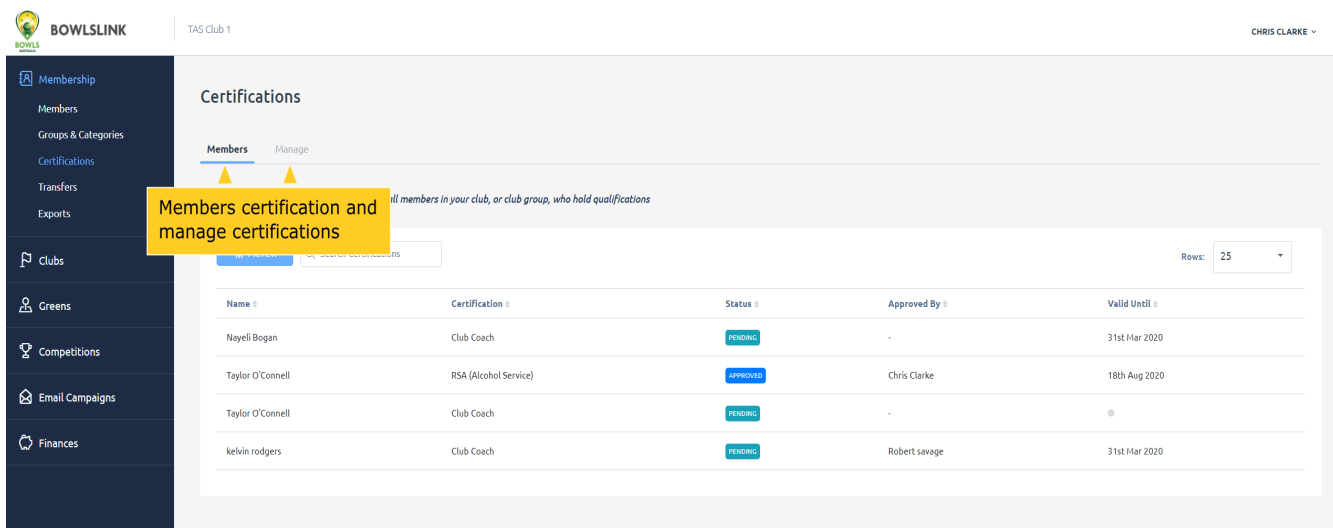
Click here to select the certifications for your club

all members in your club, or club group, who hold qualifications

Rows: 25 ▾

Name ▾	Certification ▾	Status ▾	Approved By ▾	Valid Until ▾
Nayeli Bogan	Club Coach	PENDING	-	31st Mar 2020
Taylor O'Connell	RSA (Alcohol Service)	APPROVED	Chris Clarke	18th Aug 2020
Taylor O'Connell	Club Coach	PENDING	-	●
kelvin rogers	Club Coach	PENDING	Robert savage	31st Mar 2020

The list is divided into two sections (tabs) - Members and Manage.



**BOWLSLINK** TAS Club 1 CHRIS CLARKE ▾

**Certifications**

Members Manage

Members certification and manage certifications

all members in your club, or club group, who hold qualifications

Rows: 25 ▾

Name ▾	Certification ▾	Status ▾	Approved By ▾	Valid Until ▾
Nayeli Bogan	Club Coach	PENDING	-	31st Mar 2020
Taylor O'Connell	RSA (Alcohol Service)	APPROVED	Chris Clarke	18th Aug 2020
Taylor O'Connell	Club Coach	PENDING	-	●
kelvin rogers	Club Coach	PENDING	Robert savage	31st Mar 2020

## Members

For each member listed here you will be able to retrieve their certification status, the validity of their certification and the certification type. You will be able to perform the following actions:

1. You will be able to search for a particular certification by name.
2. You will be able to change the number of rows displayed in your certifications table.

Certifications

Members Manage

Members with Certification *hold qualifications*

Search for a certification by entering a member or certification name

Number of rows defaults to 25, this can be changed through this menu

Rows: 25

Name	Certification	Status	App	Expires
Nayeli Bogan	Club Coach	PENDING	-	31st Mar 2020
Taylor O'Connell	RSA (Alcohol Service)	APPROVED	Chris Clarke	18th Aug 2020
Taylor O'Connell	Club Coach	PENDING	-	
kelvin rogers	Club Coach	PENDING	Robert savage	31st Mar 2020

## Manage

In the manage section of certifications you will be able to approve, extend and revoke certifications you have permission to manage. If there are any certifications that require review by you they will be listed here.

1. You will be able to search for a particular certification by name.
2. You will be able to change the amount of rows displayed in your certifications table.
3. Filter functions are also available, functioning the same as the Members Certification tab.

Certifications

Members Manage

Manage Certifications

Search for a certification by entering a member or certification name

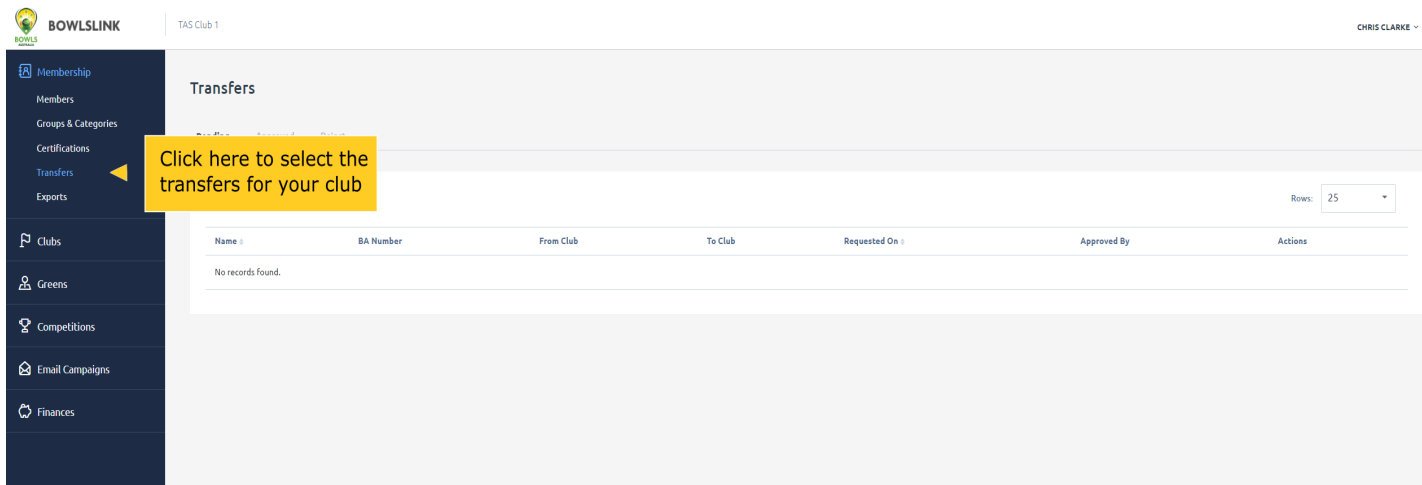
Number of rows defaults to 25, this can be changed through this menu

Rows: 25

Name	Certification	Attachment	Status	Approve
No records found.				

## Transfers

The transfer section is used to manage the approval or rejection of transfers from your club, to be primary members of other clubs. It also provides a history of transfers to your club, where dual members have become a primary member of your club.

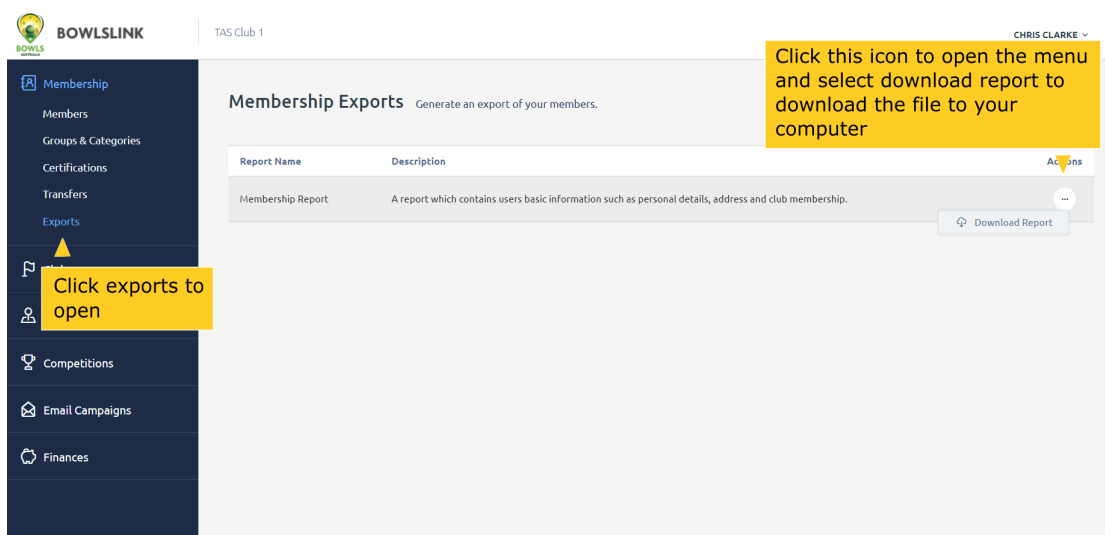


## Exports

This function allows you to export a report of your club and membership in a format that is suitable for opening in a spreadsheet program such as Microsoft Excel.

Currently the membership report includes the following information:

- Name
- Email
- Mobile Phone
- ID
- Birth date
- Gender
- Address
- Membership status



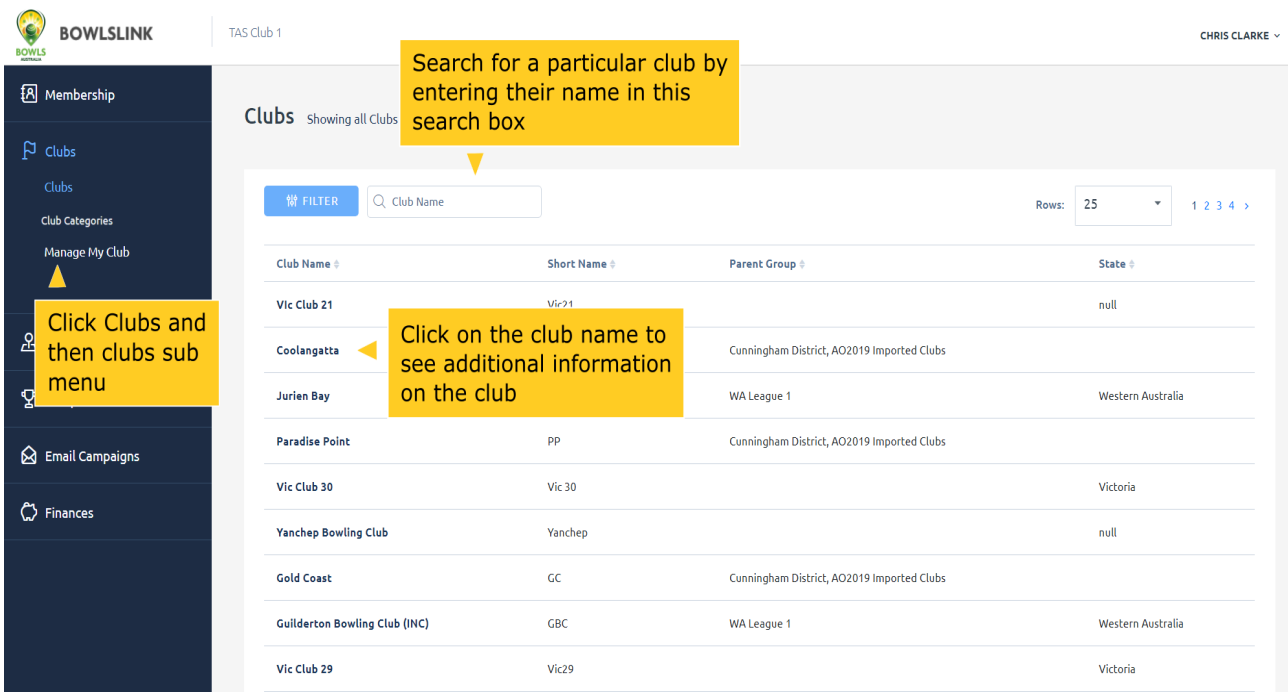
1. Select the exports option in the membership menu. The available reports will appear, with the membership report as the only current report. Other reports may be added over time. Click the action icon to download a copy of the report for your club.



## Clubs

In the **Clubs** sub-section, you will be able to see all clubs that are currently active in BowlsLink. You will be given some club details without clicking into their club profile and you will be able to perform the following actions:

1. You will be able to click onto the clubs' name to retrieve additional information about the chosen club.
2. You will be able to search for a particular club by name.



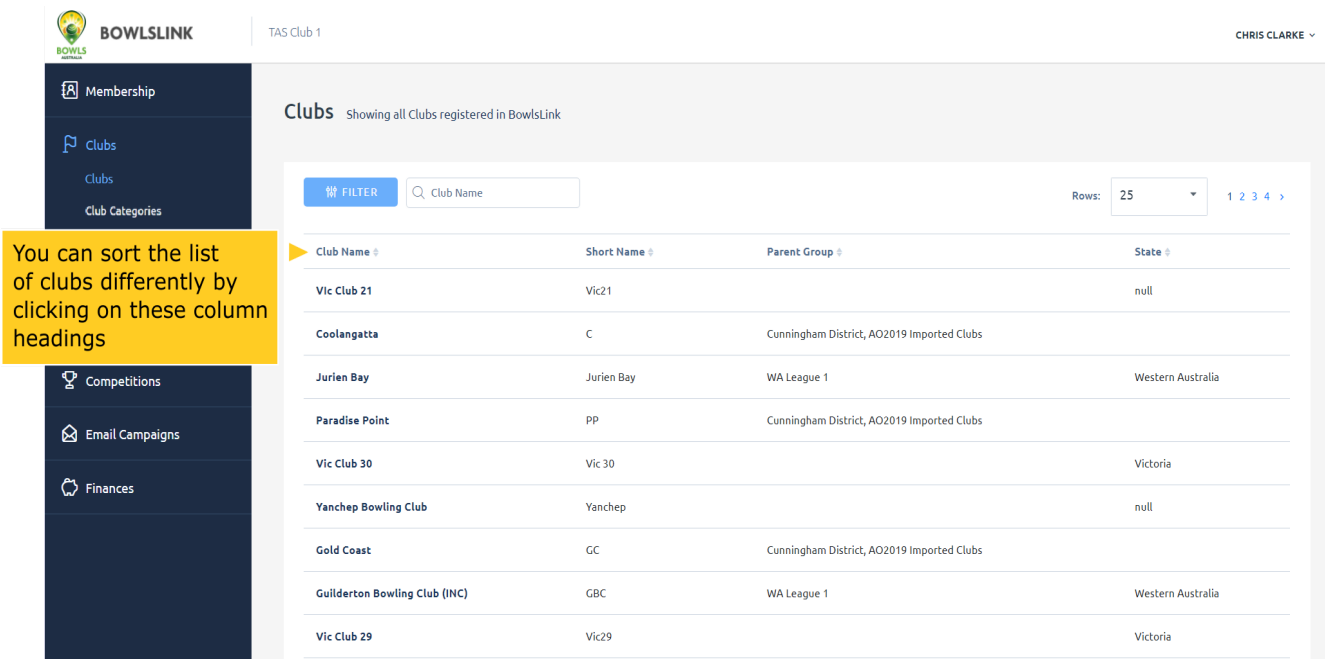
**BOWLSLINK** TAS Club 1 CHRIS CLARKE ▾

**Clubs** Showing all Clubs

**Search:** FILTER Club Name Rows: 25 1 2 3 4 >

Club Name	Short Name	Parent Group	State
Vic Club 21	Vic21		null
Coolangatta		Cunningham District, AO2019 Imported Clubs	
Jurien Bay		WA League 1	Western Australia
Paradise Point	PP	Cunningham District, AO2019 Imported Clubs	
Vic Club 30	Vic 30		Victoria
Yanchep Bowling Club	Yanchep		null
Gold Coast	GC	Cunningham District, AO2019 Imported Clubs	
Guilderton Bowling Club (INC)	GBC	WA League 1	Western Australia
Vic Club 29	Vic29		Victoria

3. You will be able to sort the list of clubs differently by clicking on the different column headers.



**BOWLSLINK** TAS Club 1 CHRIS CLARKE ▾

**Clubs** Showing all Clubs registered in BowlsLink

**Search:** FILTER Club Name Rows: 25 1 2 3 4 >

Club Name	Short Name	Parent Group	State
Vic Club 21	Vic21		null
Coolangatta	C	Cunningham District, AO2019 Imported Clubs	
Jurien Bay	Jurien Bay	WA League 1	Western Australia
Paradise Point	PP	Cunningham District, AO2019 Imported Clubs	
Vic Club 30	Vic 30		Victoria
Yanchep Bowling Club	Yanchep		null
Gold Coast	GC	Cunningham District, AO2019 Imported Clubs	
Guilderton Bowling Club (INC)	GBC	WA League 1	Western Australia
Vic Club 29	Vic29		Victoria

4. You will be able to apply specific filters to only find clubs matching your search criteria.

Clubs Showing all Clubs registered in BowlsLink

**FILTER**

Rows: 25 | 1 2 3 4 >

Click here to open the filter options

Club Name	Short Name	Parent Group	State
Vic21	Vic21		
Coolangatta	C	Cunningham District, AO2019 Imported Clubs	
Jurien Bay	Jurien Bay	WA League 1	Western Australia
Paradise Point	PP	Cunningham District, AO2019 Imported Clubs	
Vic Club 30	Vic 30		Victoria
Yanhep Bowling Club	Yanhep		null
Gold Coast	GC	Cunningham District, AO2019 Imported Clubs	
Guilderton Bowling Club (INC)	GBC	WA League 1	Western Australia

5. Filters can be applied by:

1. Groups
2. States

Clubs can be filtered by club groups or state. Click apply once the selection has been made

**Filters**

**GROUPS**

Select a Club Group

**STATE**

Victoria  
 New South Wales  
 Queensland  
 Northern Territory  
 Western Australia  
 South Australia  
 Tasmania  
 Australian Capital Territory

6. You will be able to change the amount of rows displayed in your club table.

Clubs Showing all Clubs registered in BowlsLink

**FILTER**

The number of rows defaults to 25, this can be changed through this menu

Rows: 25 | 1 2 3 4 >

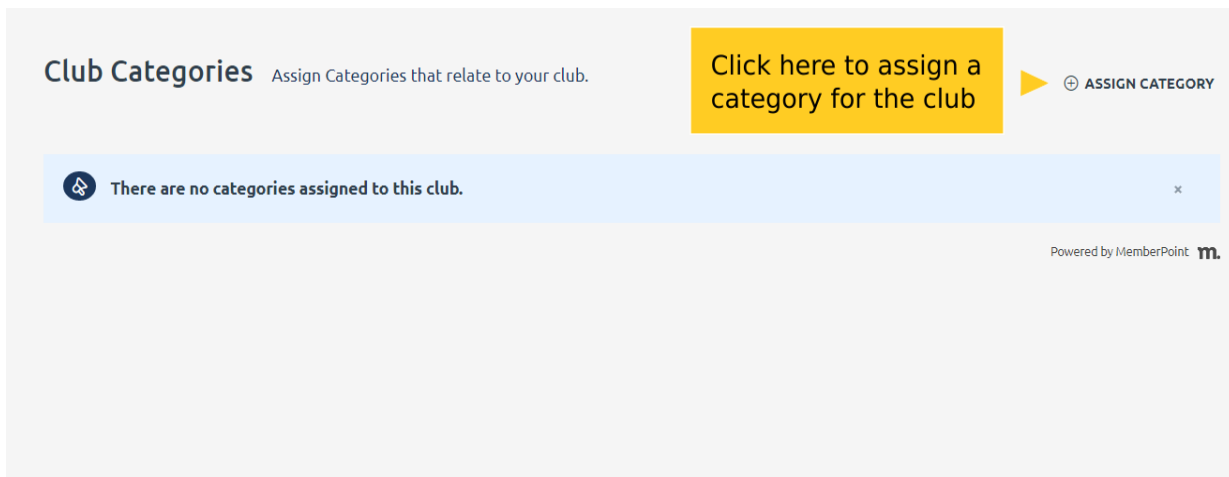
Club Name	Short Name	Parent Group	State
Vic Club 21	Vic21		
Coolangatta	C	Cunningham District, AO2019 Imported Clubs	
Jurien Bay	Jurien Bay	WA League 1	Western Australia
Paradise Point	PP	Cunningham District, AO2019 Imported Clubs	
Vic Club 30	Vic 30		Victoria
Yanhep Bowling Club	Yanhep		null
Gold Coast	GC	Cunningham District, AO2019 Imported Clubs	
Guilderton Bowling Club (INC)	GBC	WA League 1	Western Australia

## Club Categories

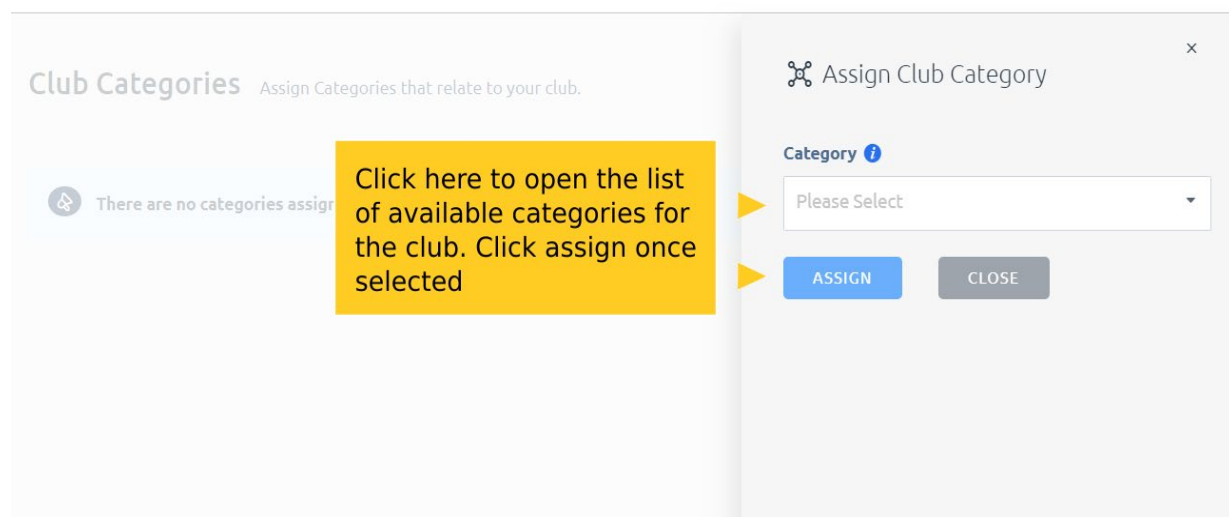
A club can have various categories assigned. Categories are used to show the various services and amenities that the club has, and this information is published in websites and other information systems about the club. The categories are selected from a pre-defined list, and the club administrator selects any and all that may apply to their club.

Examples are: Social Bowls, Meals, Entertainment, Function Room Bookings etc.

1. To add a category, click on the assign category button in the top right of screen.



2. Select from the drop down list the appropriate category for your club and click the assign button.




- Once a category has been added, it can be removed by clicking the icon at the right end of the category listing.

**Club Categories** Assign Categories that relate to your club.

Click here to remove a category from a club

Name	Description	Is Public	Owner	Actions
Midweek	Midweek Pennant	●	VIC	⊖

The new category is now added to the club

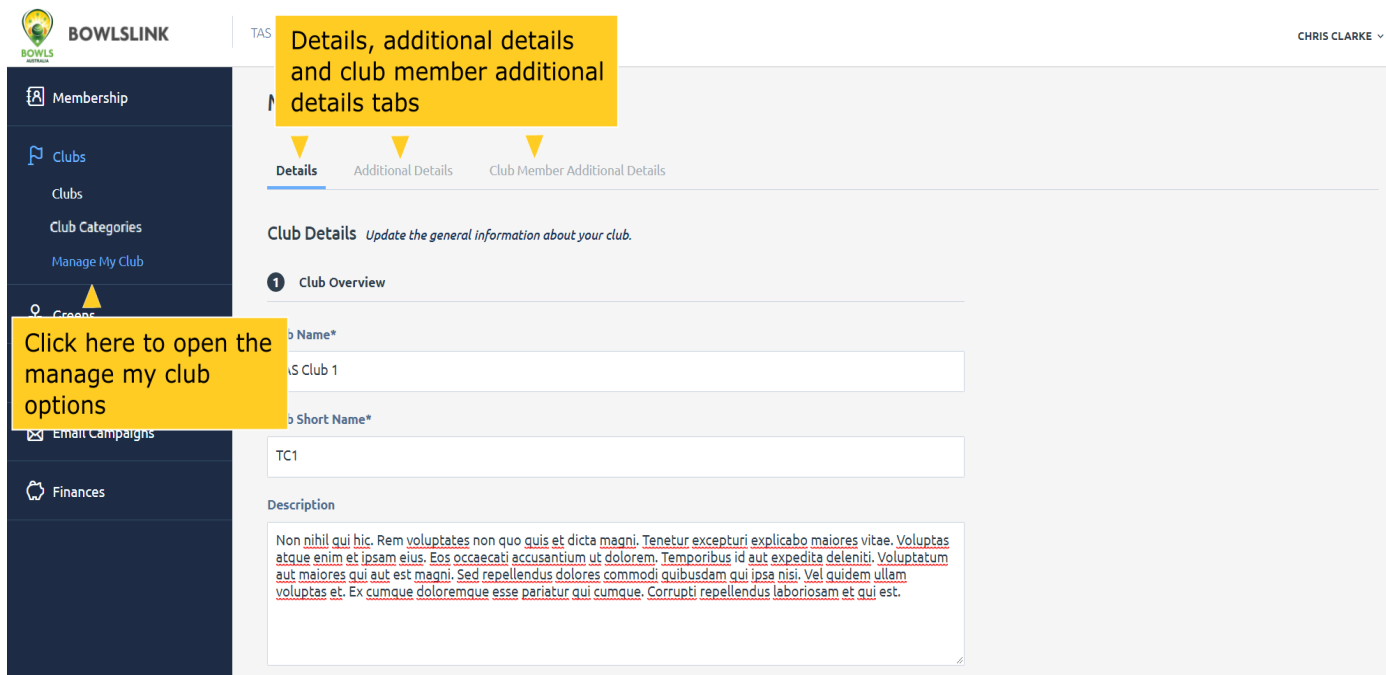
Powered by MemberPoint 

- This process can be repeated as many times as you like, to add all the required categories to the club.

## Manage My Club

In the **Manage My Club** sub-section you will be able to see all the details relevant to your club. You will be able to edit all the club information for your club.

The manage your club sub-section is divided into three tabs - Details, Additional Details and Club Member Additional Details.



**BOWLSLINK** TAS CHRIS CLARKE ▾

Membership  
Clubs  
Club Categories  
Manage My Club  
Create  
Email Campaigns  
Finances

Details, additional details and club member additional details tabs

Details Additional Details Club Member Additional Details

**Club Details** Update the general information about your club.

1 Club Overview

Name\*  
S Club 1

Short Name\*  
TC1

Description  
Non nihil qui hic. Rem voluptates non quo quis et dicta magni. Tenetur excepturi explicabo maiores vitae. Voluptas atque enim et ipsam eius. Eos occaecati accusantium ut dolore. Temporibus id aut expedita deleniti. Voluptatum aut maiores qui aut est magni. Sed repellendus dolores commodi quibusdam qui ipsa nisi. Vel quidem ullam voluptas et. Ex cumque doloremque esse pariatur qui cumque. Corrupti repellendus laboriosam et qui est.

## Details

1. In the details tab of your club you will be able to edit the following field groups:

1. Club Overview
2. Contact Details

### Manage Your Club

**Details**   Additional Details   Club Member Additional Details

**Club Details** *Update the general information about your club.*

**1 Club Overview**

Club Name\*

Club Short Name\*

Description

**2 Contact Details**

Club Phone

After Hours Phone

Club Website

Edit details fields as required

3. Club Address
4. Financial

**3 Club Address**

Address Line 1

Address Line 2

Address Line 3

Suburb

State      Postcode  
     

Country

**4 Financial**

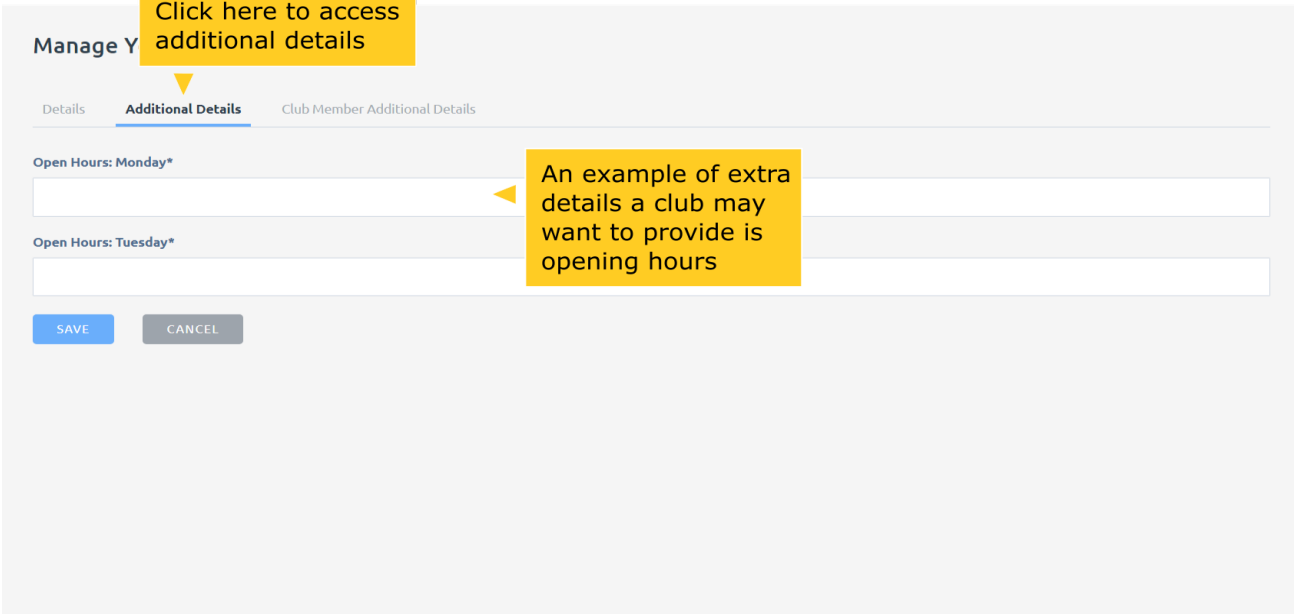
Club ABN

Membership Year Ending Date

Edit details fields as required

## Additional Details

1. In the additional details tab you will be able to update any additional details that your club is requesting. If no additional details are required this tab will not display anything.

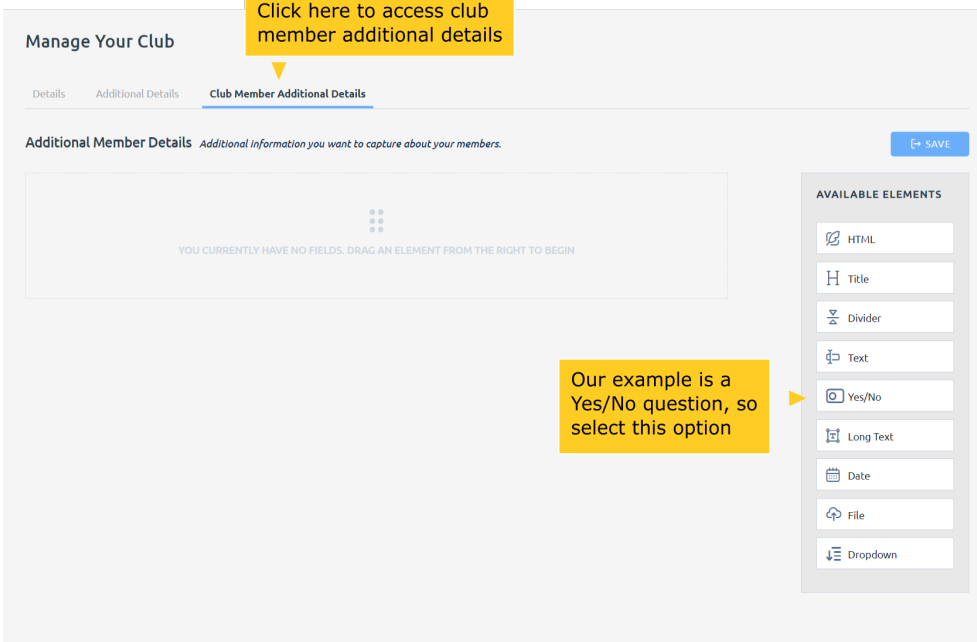


## Club Member Additional Details

In the club member additional details tab you will be able to create new additional fields to gather more data for your club members. You will be able to add the following fields:

- HTML
- Title
- Divider
- Text
- Yes/No
- Long Text
- Date
- Dropdown

1. In this example, we want to know if members are willing to volunteer with school group coaching at the club. This would be a yes or no question, so that is the option we will use.



- When Yes/No is clicked, a detailed dialog box will appear, which you can fill out with the appropriate details. In our example, we want to get a response from all members, and we want them to answer the question. Once we are happy with how the question is set up, we click save to finalise the question. It will now appear in the member's profile for them to respond to. We can then report on this in future.

### Manage Your Club

Details   Additional Details   **Club Member Additional Details**

Click save once done

---

**Additional Member Details** *Additional information you want to capture about your members.* ← SAVE

Are you able to assist with coaching of school groups at the club?

No

**Field Label Text** ⓘ

Are you able to assist with coaching of school groups at the club?

**Default Value**

No

**Settings**

**Field Required**

Yes

**Visible to members**

Yes

**Members can edit**

Yes

Field Name: 1567562399509

**AVAILABLE ELEMENTS**

- HTML
- H Title
- Divider
- Text
- Yes/No
- Long Text
- Date
- File
- Dropdown

The label in this case is the question we want the member to answer

In this case we want the default to be no, until the member responds

The question should be visible to all members, and we need members to edit, so they can say Yes or No