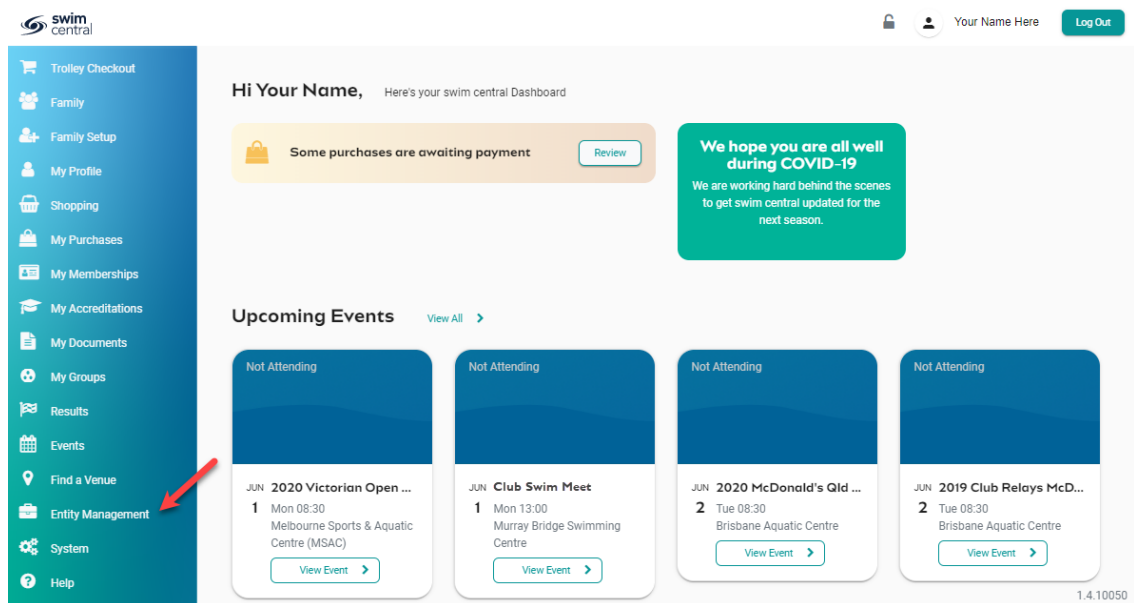


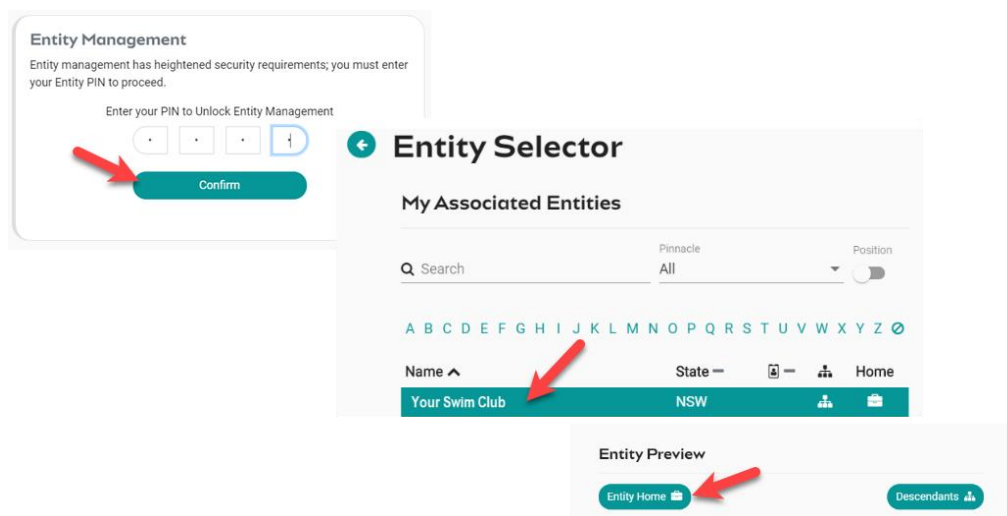
HOW TO SET UP A REPLACEMENT MEMBERSHIP PRODUCT

This help guide is for Club Administrators to set up new membership products with updated pricing to replace expiring membership products for their club.

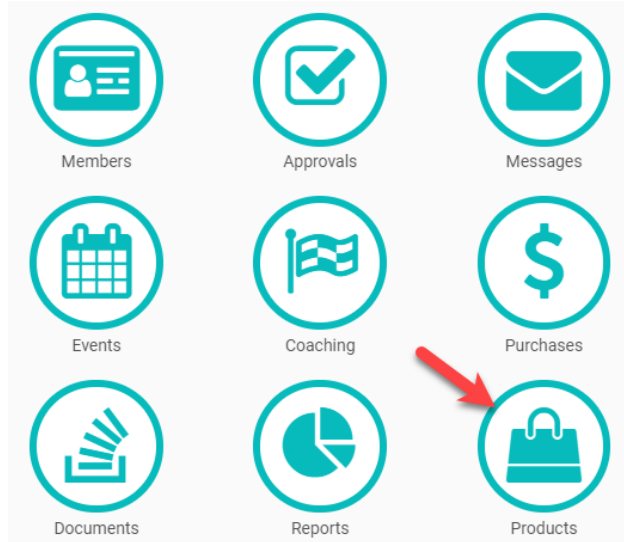
From your home screen, select **Entity Management**



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.



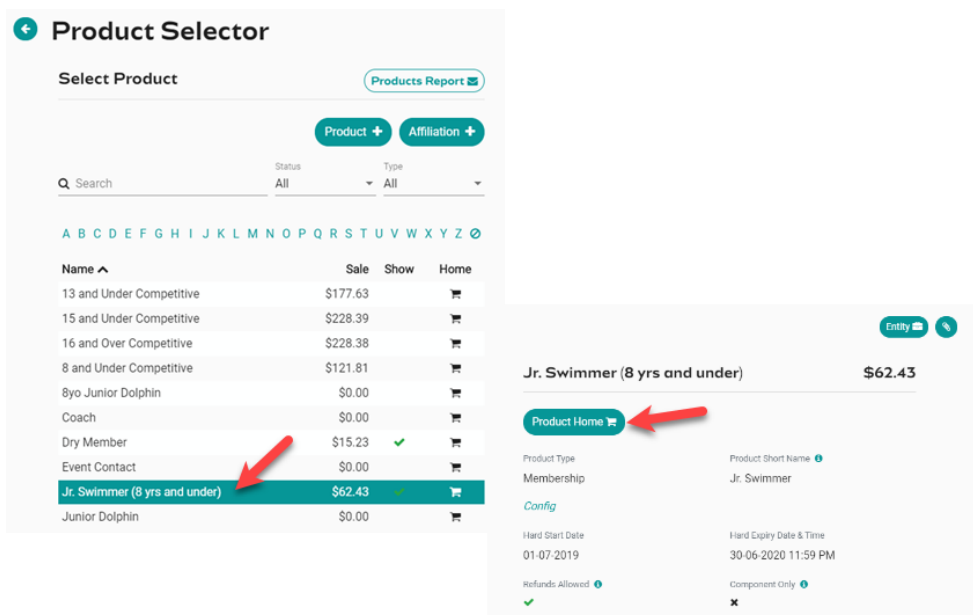
Select the **Products** icon to view the Club's list of existing membership products



You will be taken to a list of all products that have been created for your Club.

STEP 1: SWITCH OFF AVAILABILITY OF EXPIRING PRODUCTS

To replace expiring products, you must first switch off the availability of those products in the product catalogue and make them unavailable for purchase to members. To do this, select the product that is set to expire and go to the *Product Home*.



Product Selector

Select Product Products Report

Product + Affiliation +

Q Search Status: All Type: All

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Name ^	Sale	Show	Home
13 and Under Competitive	\$177.63		
15 and Under Competitive	\$228.39		
16 and Over Competitive	\$228.38		
8 and Under Competitive	\$121.81		
8yo Junior Dolphin	\$0.00		
Coach	\$0.00		
Dry Member	\$15.23	✓	
Event Contact	\$0.00		
Jr. Swimmer (8 yrs and under)	\$62.43	✓	
Junior Dolphin	\$0.00		

Jr. Swimmer (8 yrs and under) \$62.43

Product Home

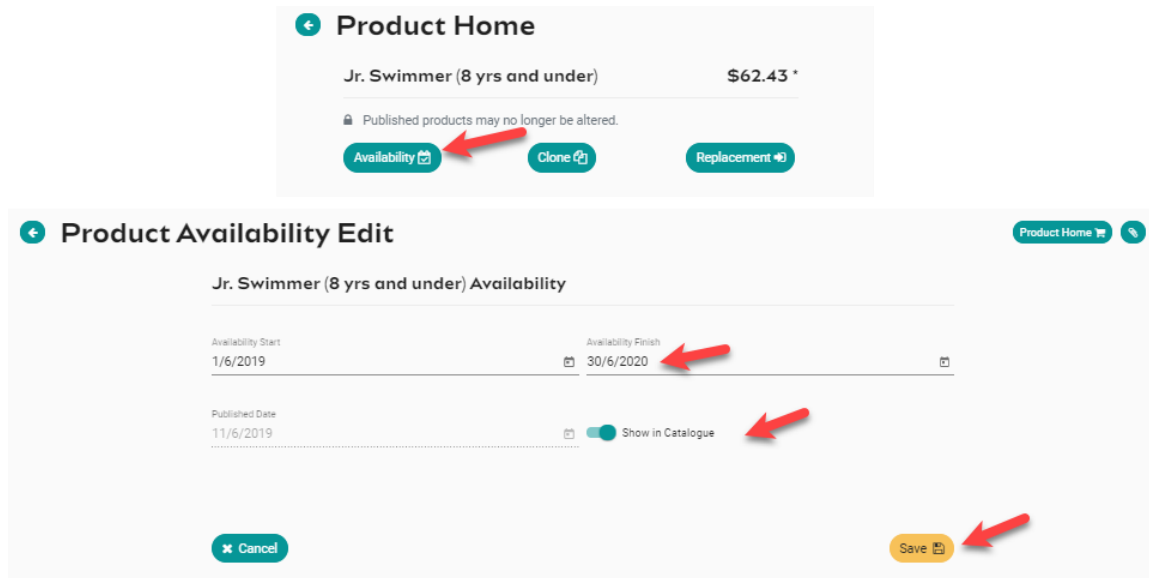
Product Type: Membership Product Short Name: Jr. Swimmer

Config

Hard Start Date: 01-07-2019 Hard Expiry Date & Time: 30-06-2020 11:59 PM

Refunds Allowed: ✓ Component Only: x

Select **Availability** to update the *Availability Finish* to today's date and toggle off the *Show in Catalogue* option to remove the product from the catalogue. Select **Save**



Product Home

Jr. Swimmer (8 yrs and under) \$62.43 *

Published products may no longer be altered.

Availability Clone Replacement

Product Availability Edit

Jr. Swimmer (8 yrs and under) Availability

Availability Start: 1/6/2019

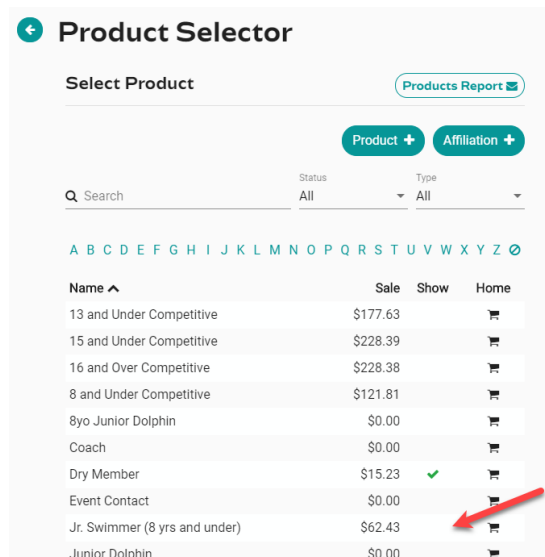
Availability Finish: 30/6/2020

Published Date: 11/6/2019

Show in Catalogue:

Cancel Save

At this point, if you select Product Selector at the top right of the page, you will be taken to a listing of your Club's products again and you will see the membership no longer has a green tick beside it in the listing.



Product Selector

Select Product Products Report

Product + Affiliation +

Q Search Status: All Type: All

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

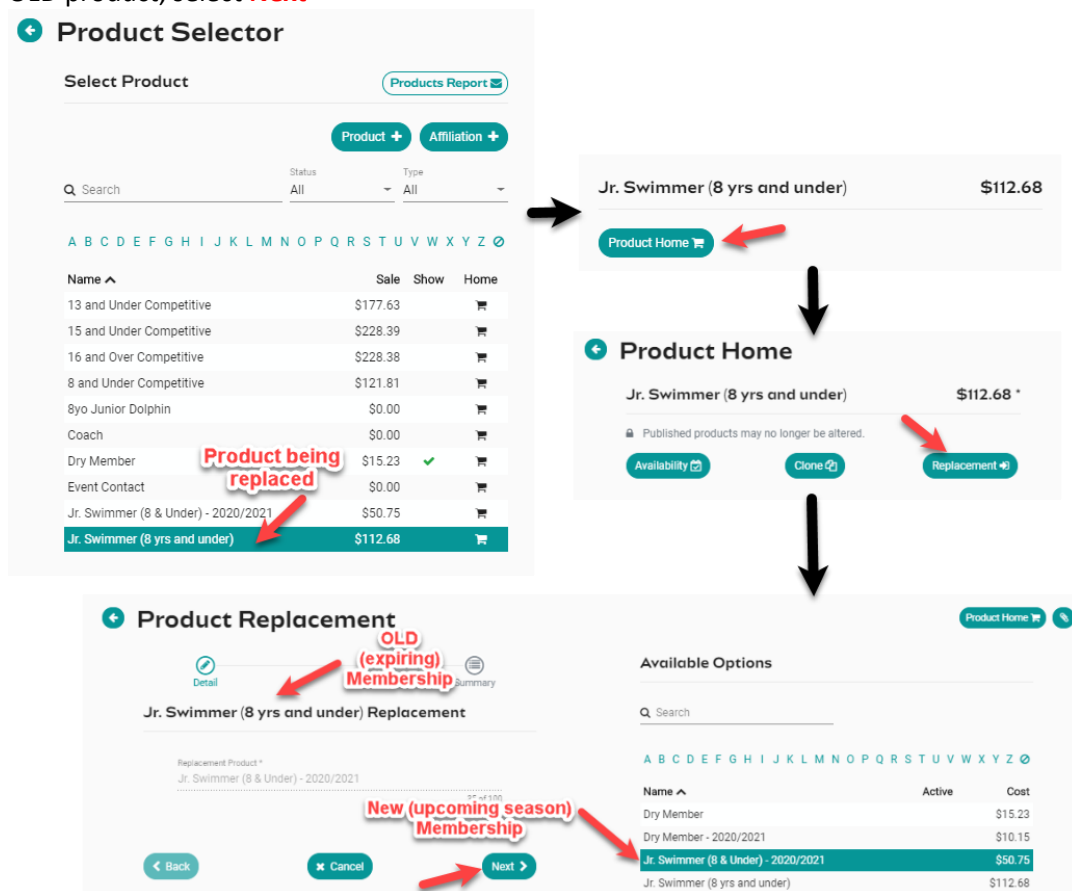
Name ^	Sale	Show	Home
13 and Under Competitive	\$177.63		
15 and Under Competitive	\$228.39		
16 and Over Competitive	\$228.38		
8 and Under Competitive	\$121.81		
8yo Junior Dolphin	\$0.00		
Coach	\$0.00		
Dry Member	\$15.23	✓	
Event Contact	\$0.00		
Jr. Swimmer (8 yrs and under)	\$62.43		
Junior Dolphin	\$0.00		

****You will need to do this for each product that currently has a tick next to it, as these products are not applicable for the 2020/2021 Season.**

STEP 2: SET UP AUTOMATIC RENEWAL REMINDERS

Swim Central has the capability to send members a reminder, via a renewal bot, when their previous membership is approaching expiry (i.e. the new season is approaching). To set this up for your Club, follow the steps below:

- Select the **OLD (expiring) membership product** (from the previous season) from the *Products Selector* list.
Remember to use the filters at the top of the screen if required.
- From the OLD (expiring) product's *Product Home* screen, select the **Replacement** button.
- From the list on the right, select the **NEW (upcoming season) product** that will replace the OLD product, select **Next**



Product Selector

Select Product Products Report

Product + Affiliation +

Q Search Status All Type All

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Name	Sale	Show	Home
13 and Under Competitive	\$177.63		
15 and Under Competitive	\$228.39		
16 and Over Competitive	\$228.38		
8 and Under Competitive	\$121.81		
8yo Junior Dolphin	\$0.00		
Coach	\$0.00		
Dry Member	\$15.23	✓	
Event Contact	\$0.00		
Jr. Swimmer (8 & Under) - 2020/2021	\$50.75		
Jr. Swimmer (8 yrs and under)	\$112.68		

Product Home

Jr. Swimmer (8 yrs and under) \$112.68

Published products may no longer be altered.

Availability Clone Replacement

Product Replacement

Jr. Swimmer (8 yrs and under) Replacement

Replacement Product *
Jr. Swimmer (8 & Under) - 2020/2021

Available Options

Name	Active	Cost
Dry Member		\$15.23
Dry Member - 2020/2021		\$10.15
Jr. Swimmer (8 & Under) - 2020/2021		\$50.75
Jr. Swimmer (8 yrs and under)		\$112.68

- Confirm that the old (expiring) membership product is being replaced with the NEW (Upcoming Season) product and select **Save**.

****Please note, if you make a mistake you can delete a replacement product, by clicking again on the **Replacement** button form the *Product Home* screen.**

The renewal bot will run **30 days before the end of the season**, but only once step 2 has been actioned by your Club. The renewal bot will:

- Send the Family Group Principal an email reminder,
- Send the Family Group Principal an internal Swim Central Message reminder, and
- Place the replacement new season membership product in the shopping trolley of the Family Group Principal.

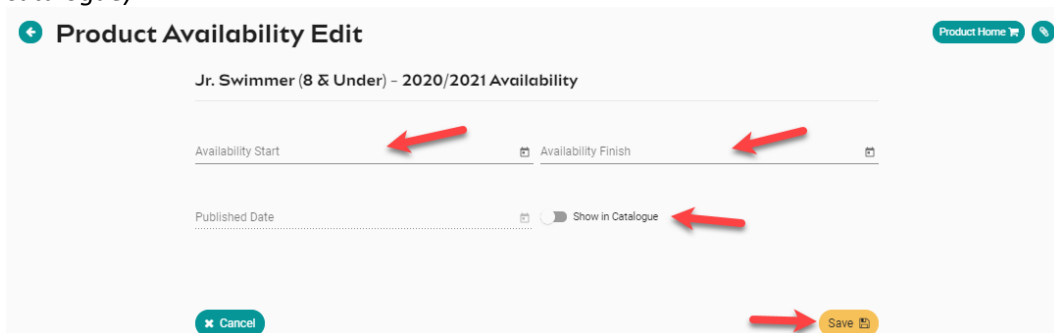
Note: Using this method of renewal is not recommended if you will be setting up discounts. One reason for this is that if you have, for example a family of three (3) in the 19/20 season, all 3 will have replacement products automatically added to their trolley. However, if only two (2) swimmers wish to renew, members will need to remove the relevant swimmer's product from their trolley so they don't purchase it, and this could affect the application of the discount that you had previously set up.

STEP 3: 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).*



- 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.