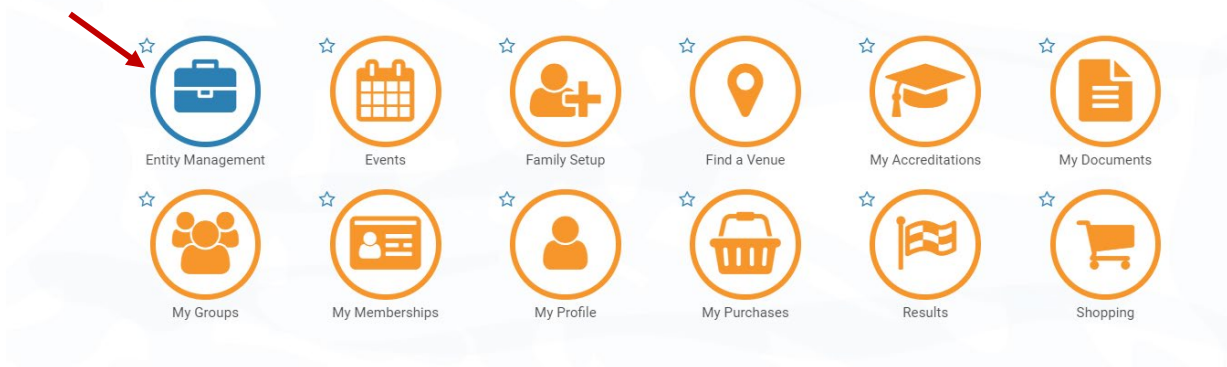


How to set up a club membership product?

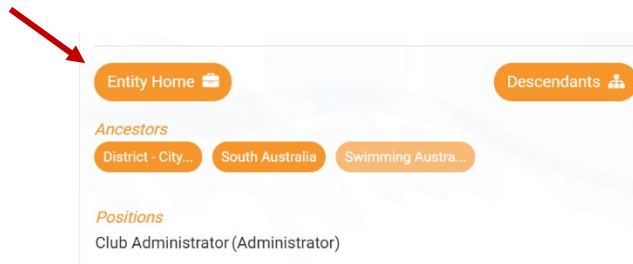
Access your 'Entity Home'

Enter your 'Entity Pin'

Welcome Home



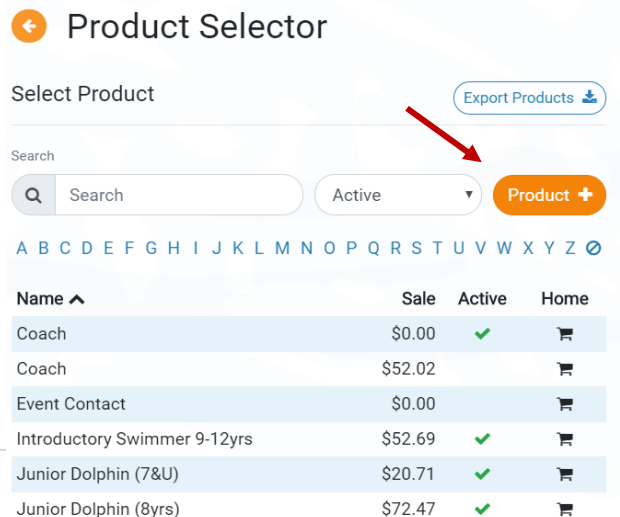
Click 'Entity Home'



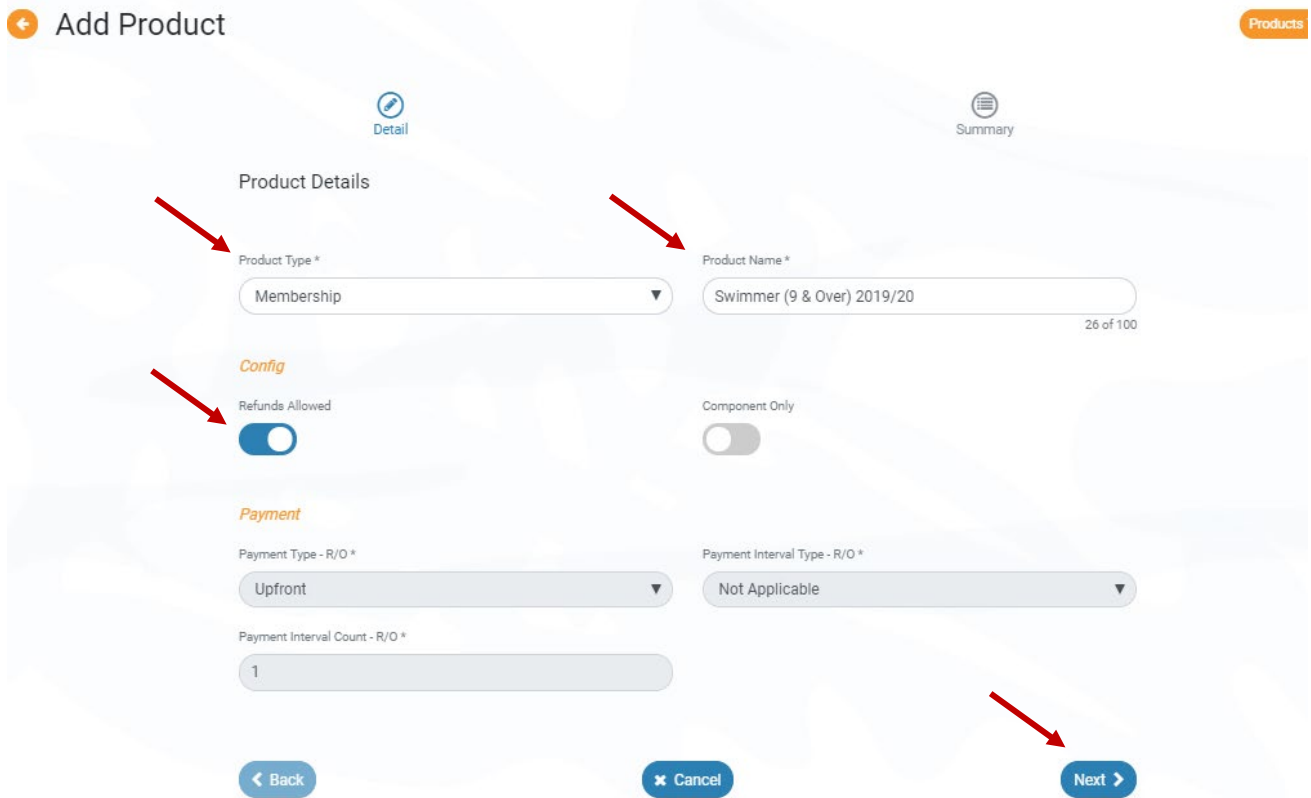
Click the 'Products' Icon
To view the club's list of membership products



Click 'Product +' to create a new product



Select **'Membership'** from the Product Type drop-down box
Type the name of membership product in **'Product Name'** and **'2019/20'**
Toggle on **'Refunds Allowed'**
'Component Only' should be toggled off for club products
Click **'Next'**

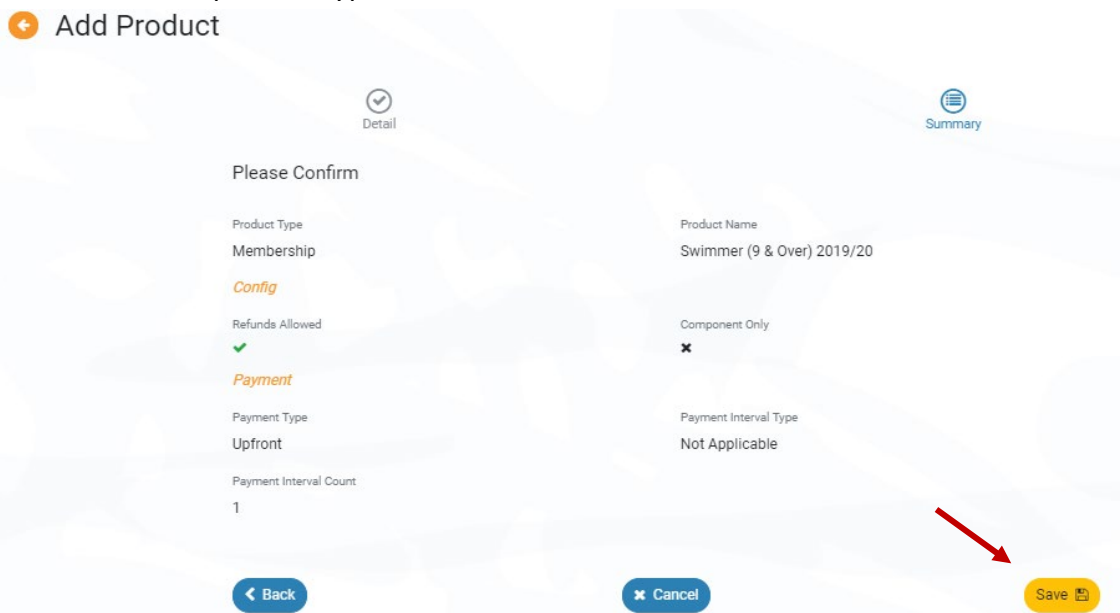


The screenshot shows the 'Add Product' form with the following fields and values:

- Product Type ***: Membership
- Product Name ***: Swimmer (9 & Over) 2019/20
- Refunds Allowed**: Toggled ON
- Component Only**: Toggled OFF
- Payment Type - R/O ***: Upfront
- Payment Interval Type - R/O ***: Not Applicable
- Payment Interval Count - R/O ***: 1

Buttons: Back, Cancel, Next

Click **'Save'** to confirm the product type & name



The screenshot shows the 'Please Confirm' screen with the following fields and values:

- Product Type**: Membership
- Product Name**: Swimmer (9 & Over) 2019/20
- Refunds Allowed**: ✓
- Component Only**: ✗
- Payment Type**: Upfront
- Payment Interval Type**: Not Applicable
- Payment Interval Count**: 1

Buttons: Back, Cancel, Save

Type in the club's product description in **'Description'**

Copy the **'Product Name'** into the **'Product Short Name'** – so the membership type shows on digital membership

Enter **Hard Start Date - 01/10/2019** Start of the season
Hard Expiry Date - 30/09/2020 End of the season

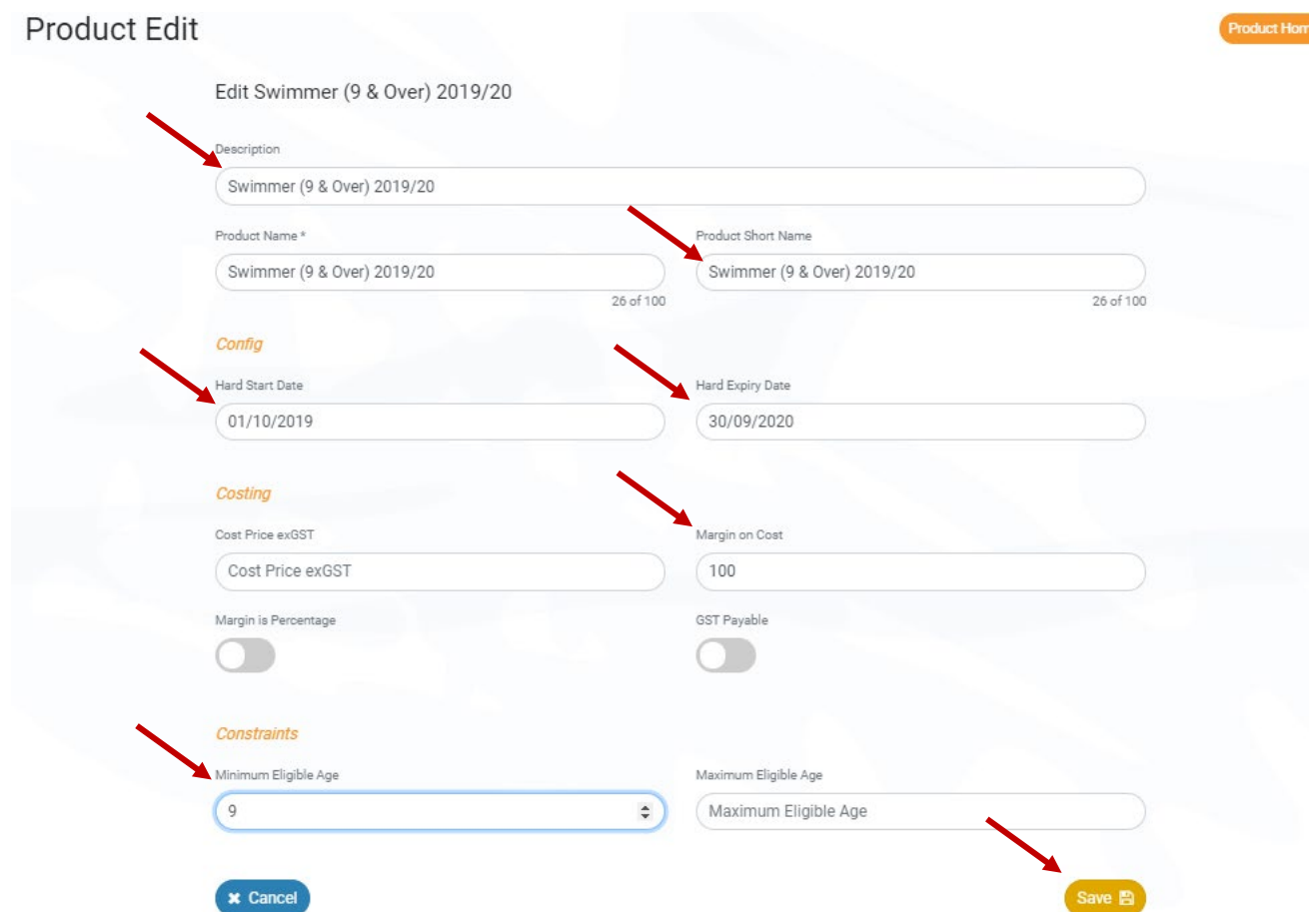
Enter the club fee in **'Margin on Cost'**

*Note: If your club is GST registered, you will need to toggle on **'GST Payable'** and enter in the fee **exGST** in the **'Margin on Cost'***



If applicable enter in the **'Minimum or Maximum Eligible Age'**

Click **'Save'**

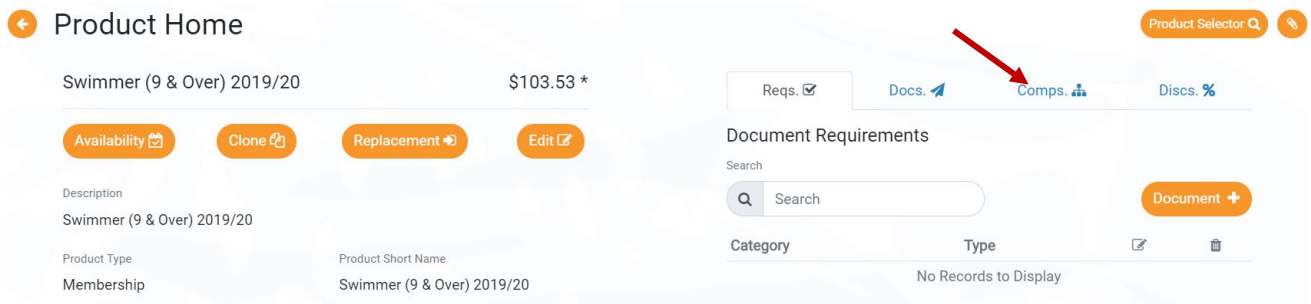


The screenshot shows the 'Product Edit' interface for 'Swimmer (9 & Over) 2019/20'. Red arrows point to the following fields:

- Description:** Swimmer (9 & Over) 2019/20
- Product Name*:** Swimmer (9 & Over) 2019/20
- Product Short Name:** Swimmer (9 & Over) 2019/20
- Hard Start Date:** 01/10/2019
- Hard Expiry Date:** 30/09/2020
- Costing - Cost Price exGST:** Cost Price exGST
- Costing - Margin on Cost:** 100
- Constraints - Minimum Eligible Age:** 9
- Save button:** A yellow button with a save icon.

Other visible elements include a 'Cancel' button, a 'GST Payable' toggle (which is turned on), and a 'Product Name' label in the top right corner.

Click on the **'Comps'** tab to add the state and national component of fees



Product Home

Swimmer (9 & Over) 2019/20 \$103.53 *

Availability Clone Replacement Edit

Description: Swimmer (9 & Over) 2019/20

Product Type: Membership Product Short Name: Swimmer (9 & Over) 2019/20

Reqs. Docs. **Comps.** Discs. %

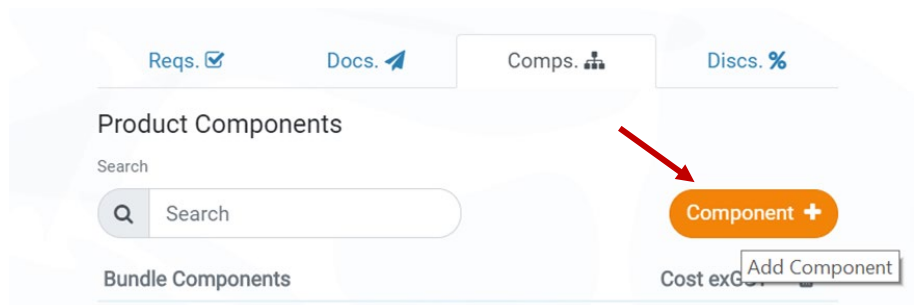
Document Requirements

Search: Search

Category Type

No Records to Display

Click **'Component +'**



Reqs. Docs. **Comps.** Discs. %

Product Components

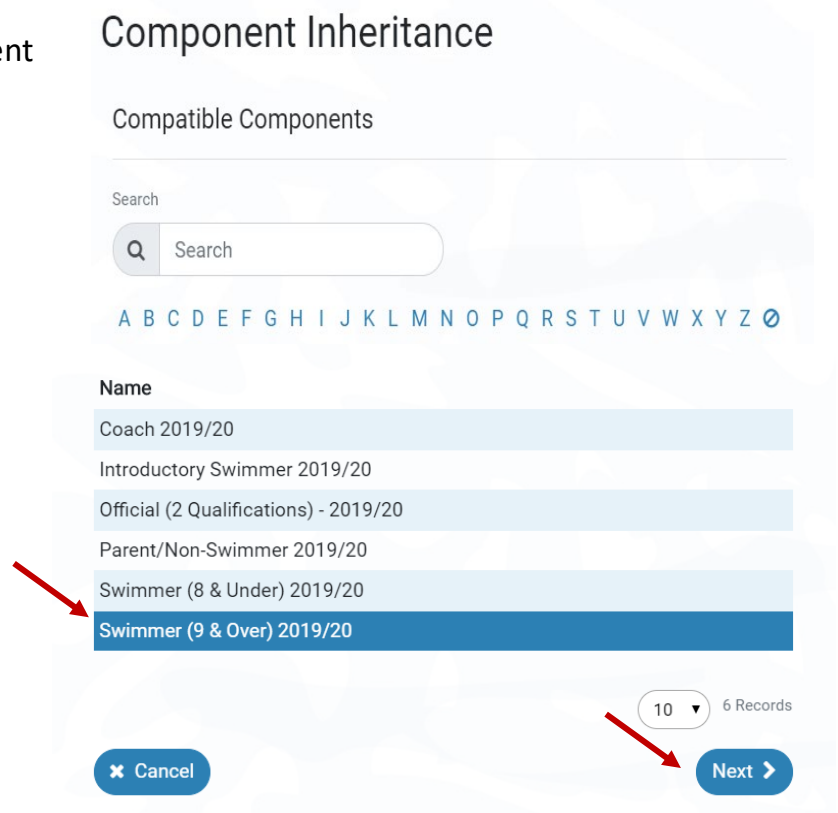
Search: Search

Bundle Components

Cost exG **Component +** Add Component

Click on the compatible component **'Swimmer (9 & Over) 2019/20'**

Click **'Next'**



Component Inheritance

Compatible Components

Search: Search

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

- Coach 2019/20
- Introductory Swimmer 2019/20
- Official (2 Qualifications) - 2019/20
- Parent/Non-Swimmer 2019/20
- Swimmer (8 & Under) 2019/20
- Swimmer (9 & Over) 2019/20**

10 6 Records

Cancel Next

Click **'Confirm'**
to add the state
and national component

Component Inheritance

Confirm Component Inheritance

Component Name
Swimmer (9 & Over) 2019/20

Component Description
Swimmer (9 & Over) 2019/20

Component Cost
\$95.45 AUD exGST

[Back](#) [Confirm](#)

Click **'Availability'** tab
To publish and make your product available for purchase

Product Home

Swimmer (9 & Over) 2019/20 \$210.10 *

[Availability](#) [Clone](#) [Replacement](#) [Edit](#)

Description
Swimmer (9 & Over) 2019/20

Product Type
Membership

Product Short Name
Swimmer (9 & Over) 2019/20

Config

Hard Start Date
01-10-2019

Hard Expiry Date
30-09-2020

Refunds Allowed
✓

Shows as Card
✗

Component Only
✗

Product Components

Search

Bundle Components

Component	Cost exGST
Swimm Swimmer (9 & Over) 2019/20	\$95.45
Total Components Cost	\$95.45

10 1 Records

Inherited Requirements

Document Requirements

Enter **'Availability Start Date - 01/09/2019'** this is the date the product will show in the catalogue and be available for members to purchase

'Availability Finish Date - 30/09/2020' End of the season

Please be sure your product is set up correctly before you toggle on **'Show in Catalogue'** once published you will NOT be able to edit the product except for discounts

Toggle on **'Show in Catalogue'** to publish to product
Click **'Save'**

Swimmer (9 & Over) 2019/20 Availability

Availability Start
01/09/2019

Availability Finish
30/09/2020

Published Date - R/O
dd/mm/yyyy

Show in Catalogue

[Cancel](#) [Save](#)

Now the base product has been set up you will have the option to set up discounts
Your club may choose to offer the options below for the 2019/20 season

How to set up product discounts (prorate)

Swim Central feature to set up automatic membership renewals

How to set up replacement products