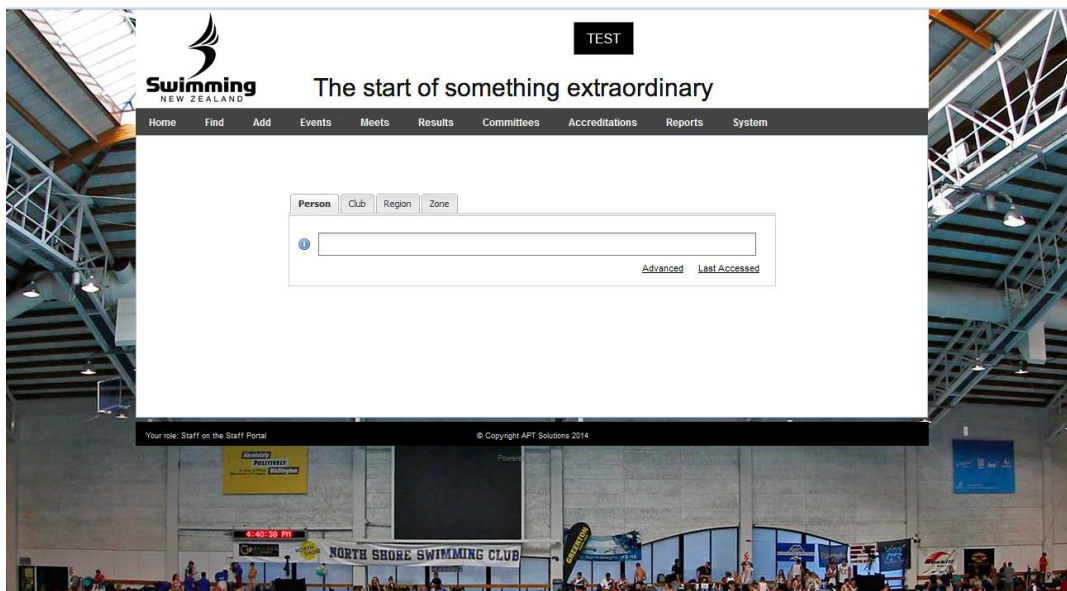


National Database (Stratum) Instructional Document for Regional and Club Administrators

Swimming New Zealand



Welcome to Stratum, the Swimming New Zealand National Database. Once logged into the system using your username and password you can then follow the steps below to update your records, membership details, meets, etc.

Have fun exploring and if you need some extra assistance feel free to contact info@swimmingnz.org.nz, where your details will be passed to the appropriate person and they will contact you back to help.

Please note that this document is a work in progress while new features are added over the next 18 months.

*Last updated 21 January 2015
Version 1.4*

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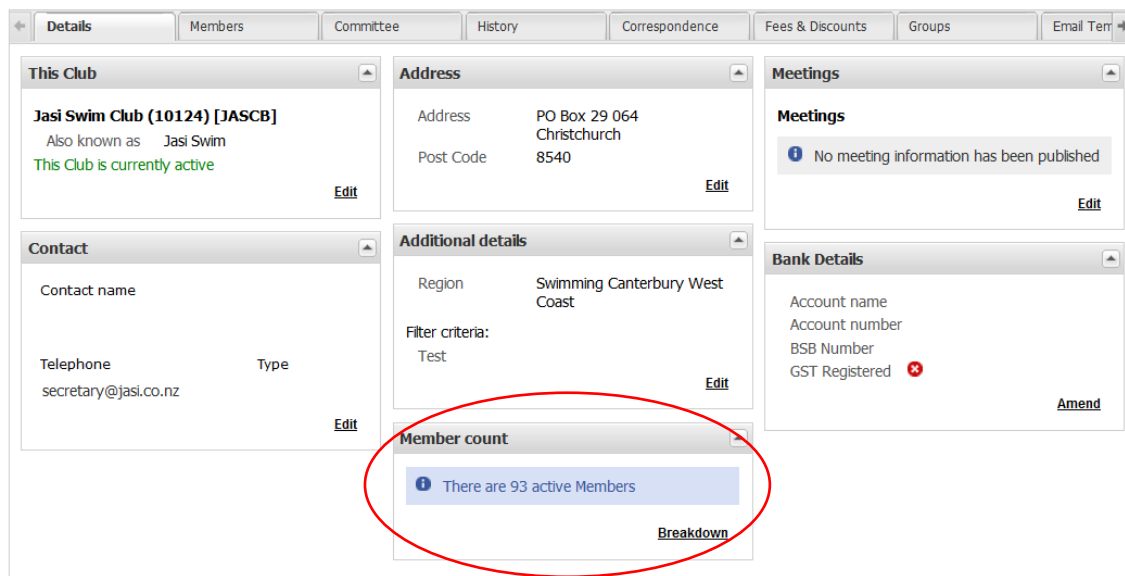
MEMBERSHIPS

How do I view a summary of my club's memberships?

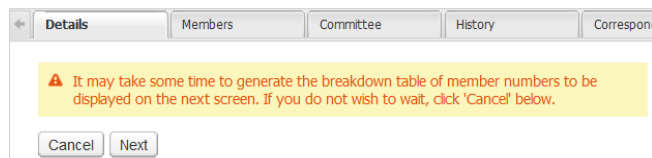
Click the Club tab and begin typing the name of your club. Select your club from the drop down list.



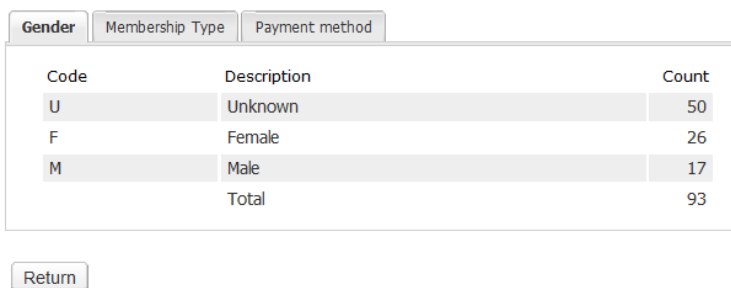
Click on Breakdown on the Member count section of the Details tab.



Click Next



You then get three tabs to take details from.



Gender	Membership Type	Payment method
Code	Description	Count
2	Competitive Swimmer	68
7	Administrator	13
5	Coach	6
6	Non-Voting Technical Official	4
1	Club Swimmer	2
	Total	93

[Return](#)

Gender	Membership Type	Payment method
Code	Description	Count
C	Cheque / Cash	93
	Total	93

[Return](#)

How do I view a full listing of my club's members?

Click on the club tab and access your club's profile.

Swimming
NEW ZEALAND

The start of something extraordinary

Home Find Add Events Meets Results Committees Accreditations Reports System

Person **Club** Region Zone

Advanced Last Accessed

Your role: Staff on the Staff Portal © Copyright APT Solutions 2014

Select the Members tab

Member No.	Forenames	Surname	Membership Type	Status	Approved
[Redacted]	E	R	Competitive Swimmer	Active	Approved
[Redacted]	J	R	Administrator	Active	Approved
[Redacted]	S	R	Competitive Swimmer	Active	Approved
[Redacted]	F	B	Coach	Active	Approved
[Redacted]	M	T	Competitive Swimmer	Active	Approved
[Redacted]	E	R	Competitive Swimmer	Active	Approved
[Redacted]	J	B	Administrator	Active	Approved
[Redacted]	H	C	Competitive Swimmer	Active	Approved
[Redacted]	J	R	Coach	Active	Approved
[Redacted]	J	J	Competitive Swimmer	Active	Approved
[Redacted]	K	V	Administrator	Active	Approved
[Redacted]	E	H	Competitive Swimmer	Active	Approved
[Redacted]	F	R	Non-Voting Technic...	Active	Approved
[Redacted]	R	C	Competitive Swimmer	Active	Approved
[Redacted]	J	G	Administrator	Active	Approved
[Redacted]	A	B	Competitive Swimmer	Active	Approved
[Redacted]	J	B	Competitive Swimmer	Active	Approved
[Redacted]	F	A	Competitive Swimmer	Active	Approved
[Redacted]	S	H	Competitive Swimmer	Active	Approved
[Redacted]	S	P	Competitive Swimmer	Active	Approved

This screen lists all members in your club. The list can be sorted in various ways by moving your mouse over the column titles and selecting the sorting method available, e.g. Surnames ascending or descending.

Using the buttons located on the bottom left-hand side of the list, you can chose to filter the member list to show Only Lapsed Members or All Members.

Also use the download button on the bottom right to export the list of members you are viewing to a csv file.

Selecting the highlighted Member Number will show the following member profile.

Mailname	Membership Type	Membership Number	Meet Manager	Date of Birth	Age	Join date	Indicator	Approved Status
Miss E [REDACTED]	Competitive Swimmer	3 [REDACTED]	[REDACTED]	[REDACTED]	16	17/07/2011	Unknown, Non Paying	Approved

Personal | Profile | Events & Meets | Accreditation | Correspondence | History | Biometrics

This person

Miss E [REDACTED] ([REDACTED])

[Add to Basket](#) [Personal details](#)
[Add to Card run](#)

Web Access

Web User Id [Not set]
Password [Not set]

[Edit](#)

Status

Record [REDACTED] is currently active

[Lapse](#)

Contacts

Type: Personal, Email addresses: [REDACTED], Log [REDACTED], Send quick email

Type: Telephone, [REDACTED], Mobile: [REDACTED]

[Log incoming call](#) [Log outgoing call](#)
[Edit contact details](#)

Personal Address

Address: [REDACTED]
Post Code: [REDACTED]

[Edit](#)

Club

[Jasi Swim Club](#)
PO Box 29 064
Christchurch
8540

[Select](#)

Secondary Club

[Select](#)

Region

[Swimming Canterbury West Coast \(code: 3\)](#)
(normally derived from Club)

Approved Member Status

Approved

[Edit](#)

Subscriptions

Type	Competitive Swimmer
Pay Method	Cheque / Cash
Paid By	
Description	Value
Club subscriptions	
Region / State / National	0.00
Total	0.00

Subs due today 0.00
Total due 0.00
Discount
Discounted Amount 0.00

[Manual pay](#) [Pay Now](#) [Transactions](#) [Edit](#)

To return to the full list of members, select Return to main Screen at the top of the new page.

[Return to main screen](#)

Mailname	Membership Type	Membership Number	Meet Manager	Date of Birth	Age	Join date	Indicator	Approved Status
Miss E A Rennell	Competitive	35R4R0	1ASRFAN6059R	06/05/1998	16	17/07/2011	Unknown, Non	Approved

How can I export a full list of my members and their information?

Click the Club tab and begin typing the name of your club. Select your club from the drop down list.

Person | **Club** | Region | Zone

ok

[10204] Okato
Swimming Taranaki | Star rating
Club

[Advanced](#) [Last Accessed](#)

Click on the Members tab to display a list of your members. Only the Approved/Active (paid) members will be displayed by default.

Member No.	Forenames	Surname	Membership Type	Status	Approved
[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Administrator	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Coach	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Coach	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Coach	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Administrator	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved

Page 1 of 5 | 1 - 20 of 93 | Per page 20 | csv

You can export the following lists of members from buttons at the bottom of the page:

- Active Members
- Approved Members only
- Pending Members only
- Incomplete Members only
- Lapsed Members

[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Administrator	Inactive	Approved
[Redacted]	[Redacted]	[Redacted]	Coach	Active	Approved

Page 1 of 8 | 1 - 20 of 147 | Per page 20 | csv

To export the members listing, hover over the bottom right-hand side of the table, to display the download options as below.

Select whether you would like to download the members listing as a CSV or XLS file. The download will begin shortly. You can open this spreadsheet in excel and view your members details.

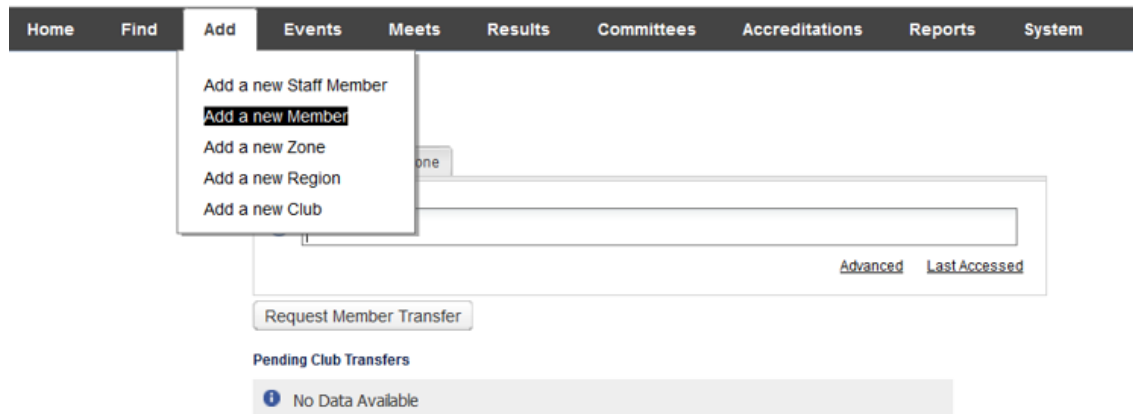


The following fields will be automatically downloaded in the export:

- Membership Number
- First Name
- Last Name
- Address
- Addr2
- Addr3
- Suburb
- City
- Postcode
- Email Address
- Telephone Number
- Mobile Number
- Emergency Contact Name
- Emergency Contact Number
- DOB
- Age
- Gender
- Indicator
- Status Approved
- National Member Type
- Zonal Member Type
- Regional Member Type
- Club Member Type
- Meet Manager ID
- Club
- Region

How do I create a new member?

Select Add a new Member from the Add tab on the homepage, once you have logged in.



Enter in all required fields and then select the Next button.

Home	Find	Add	Events	Meets	Results	Committees	Accreditations	Reports	System
-------------	-------------	------------	---------------	--------------	----------------	-------------------	-----------------------	----------------	---------------

Add a Member

Club

Capital Swim Club (10041)

Personal details

* Title

* Surname

* Forenames

* Date of birth

* Gender

Address

* Address

* Suburb

* City

* Postcode

Your role: Administrator on the Club Committee Members at Capital Swim Club © Copyright APT Solutions 2014

Please Note: Due to being unable to have middle initial field separated from the forename we have some special requirements for the forename field. A member's Forename **MUST** have no space in it and then a space plus their middle name initial letter. Should a member not have a middle initial then please put Z in its place. (ie. EmmaRose Z, or TeAroha C). This is vital for the system to be able to generate a correct Meet Manager ID. *If you require further clarification then please contact your regional administrator.*

Then complete at least one telephone and email field as well as the Membership Type, before clicking the Save button.

Home Find Add Events Meets Results Committees Accreditations Reports System

Add Contact Details

Contacts

⚠ At least one telephone and email has to be entered

Personal Email

Work Email

Work Telephone

Direct Telephone

Home Telephone

Mobile

Fax

Membership Type

* Type

Back Save

Your role: Administrator on the Club Committee Members at Capital Swim Club © Copyright APT Solutions 2014

You can then see the members details and will be able to go in to view the members profile.

Home Find Add Events Meets Results Committees Accreditations Reports System

Member's Details

Member's Details

Membership Number 945038
Membership Type Administrator
Name Mrs B Erkens
Type Administrator
Web Login User ID
Club [Capital Swim Club](#)
Total Subscription 0.00

Breakdown of subscriptions

Details	Subscription	Discount
Mrs Becki Erkens (945038)	0.00	0.00

Family Members

Surname	First Name	Date of Birth	Membership Type
No Data Available			

Add Family Member Make Payment Edit Member

Your role: Administrator on the Club Committee Members at Capital Swim Club © Copyright APT Solutions 2014

From here you can go into Add Family Member or Make Payment but these are features still to be added. Edit Member will take you into the new member's profile.

Mainname	Membership Type	Membership Number	Meet Manager	Date of Birth	Age	Join date	Indicator	Approved Status
Miss E [REDACTED]	Competitive Swimmer	3 [REDACTED]	[REDACTED]	[REDACTED]	16	17/07/2011	Unknown.Non Paying	Approved

Personal	Profile	Events & Meets	Accreditation	Correspondence	History	Biometrics
----------	---------	----------------	---------------	----------------	---------	------------

This person

Miss E [REDACTED] ([REDACTED])

[Add to Basket](#) [Personal details](#)
[Add to Card run](#)

Web Access

Web User Id [Not set]
Password [Not set]

[Edit](#)

Status

✔ Record [REDACTED] is currently active

[Lapse](#)

Contacts

Type Personal Email addresses [REDACTED]

[Log received email](#) [Send quick email](#)

Type Telephone [REDACTED]
Mobile [REDACTED]

[Log incoming call](#) [Log outgoing call](#)

[Edit contact details](#)

Club

[Jasi Swim Club](#)
PO Box 29 064
Christchurch
8540

[Select](#)

Secondary Club

[Select](#)

Region

[Swimming Canterbury West Coast \(code: 3\)](#)
(normally derived from Club)

Approved Member Status

Approved

[Edit](#)

Subscriptions

Type Competitive Swimmer
Pay Method Cheque / Cash
Paid By

Description	Value
Club subscriptions	
Region / State / National	0.00
Total	0.00

Subs due today 0.00
Total due 0.00
Discount
Discounted 0.00

How do I request a member transfer to my club?

Select Request Members Transfer button.

**Please note you will need to know both the Member Number and Surname of the member you wish to transfer. If the Member does not know their Member Number, they will need to contact their Regional Administrator.*

Also, you must be logged in under a Regional or Club Administrator role to be able to complete this action.

Home	Find	Add	Events	Meets	Results	Committees	Accreditations	Reports	System
----------------------	----------------------	---------------------	------------------------	-----------------------	-------------------------	----------------------------	--------------------------------	-------------------------	------------------------

Person Club Region Zone

i

[Advanced](#) [Last Accessed](#)

[Request Member Transfer](#)

Pending Club Transfers

i No Data Available

Enter the members Member Number and Surname, click Next.

To add someone to your list, they must already have a record in the membership system. Enter that number below, and their surname, and we will try to locate them.

If you already know that they do not have a record, please ask them to use the Join Online website and, when finished, let you know the number they are allocated.

Member's Details

* Member no	<input type="text"/>	!
* Surname	<input type="text"/>	!

Cancel Next

The Member's Details will appear, keep the Status as Approve Request, then Save.

Member's Details

Member	3	
Name	M	
DOB	1	
Requested by	944856 Mrs B Erkens	
Date	28/05/2014	
Time	15:57:49	

Current Club

Club	Wharenui Swim Club
Status	Approved

New Club

* Club	!	<input type="text"/>
Status		Pending

Back Save

Select the Subscription Type you wish the member to have when transferred, then Save.

New Subscription

Back Save

✓ The details have been updated

Return

The pending transfer will now sit on the main login screen.

Person Club Region Zone

[Advanced](#) [Last Accessed](#)

Request Member Transfer

Pending Club Transfers

Name	From	Status	To	Status
Miss M [REDACTED]	Wharenui Swim Club	Approved	Selwyn Swim Club	Pending

CSV

How do I link members together as families?

In the Person tab..



The start of something extraordinary

Home Find Add Events Meets Results Committees Accreditations Reports System

Person Club Region Zone

[Advanced](#) [Last Accessed](#)

Type the members surname in the search bar, select the correct member name when the dropdown bar appears.

Person Club Region Zone

Mrs Becki Erkens [944856 - Administrator] | [Advanced](#) [Last Accessed](#)

10

Click the member you wish to add to a family group to bring up their details. On the 'Profile' tab, you can view any existing relationships which exist in the system already.

Mailname	Membership Type	MEMBERSHIP Number	Meet Manager	Date of Birth	Age	Join date	Indicator	Approved Status
Mrs B Erkens	Administrator	944856				01/01/2014	Unknown.Non Paying	Approved

Personal | **Profile** | Events & Meets | Accreditation | Correspondence | History | Biometrics

This person

Mrs Becki Erkens (944856)

[Your settings](#) [Personal details](#)

[Remove from Card run](#) [Add to Basket](#)

Group List

[Edit](#)

Relationships

- Relationships
- Staff (Club)

Interests

There are no Interests recorded

[Edit](#)

Mailing Preferences

Optional mail

External mail

Allow Phone?

Allow Email?

Allow SMS?

Email lists

There are no Email lists recorded

[Edit](#)

Clicking back to the 'Personal' tab will bring up the below screen. Click 'Edit' button under 'Subscriptions' to set up a family relationship.

Personal | Profile | Events & Meets | Accreditation | Correspondence | History | Biometrics

This person

Mrs Becki Erkens (944856)

[Your settings](#) [Personal details](#)

[Remove from Card run](#) [Add to Basket](#)

Web Access

Web User Id **Becki**

Password *********

[Edit](#)

Status

Record 944856 is currently active

[Lapse](#)

Contacts

No email addresses set

[Log received email](#) [Send quick email](#)

No phone numbers set

[Log incoming call](#) [Log outgoing call](#)

[Edit contact details](#)

Club

[Staff](#)

[Select](#)

Approved Member Status

Approved

[Edit](#)

Secondary Club

[Select](#)

Subscriptions

Type	Staff
Pay Method	None Required
Paid By	
Description	Value
Club subscriptions	
Region / State / National	0.00
Total	0.00

Subs due today 0.00

Total due 0.00

Discount

Discounted Amount 0.00

[Pay Now](#) [Transactions](#) [Edit](#)

[Manual pay](#)

Region

National (code: 99)

(normally derived from Club)

Personal Address

No address set

Address

Post Code

[Edit](#)

Meet Manager

Meet Manager

[Edit](#)

Emergency contact

Enter the name of the person you wish to set up the family relationship with in the 'Paid by' box. This will establish this person as the Primary in the family relationship. The member you are editing becomes the Secondary.

Personal Profile Additional info Events & Meets Accreditation

Subscriptions

* Type Non-Swimmer

Renewal date 01/10/2014

* Effective date dd/mm/yyyy

Paid By

Cancel Save

Repeat the process with any remaining family members.

How do I add a single member to a group?

<The Groups functionality is still being developed.>

In the Person tab..



Person Club Region Zone

Advanced Last Accessed

Your role: Staff on the Staff Portal © Copyright APT Solutions 2014

Type the members surname in the search bar, select the correct member name when the dropdown bar appears.

Person Club Region Zone

erk

Mrs Becki Erkens [944856 - Administrator] | 10

Advanced Last Accessed

Click on the Profile tab.

Mainname	Membership Type	Membership Number	Meet Manager	Date of Birth	Age	Join date	Indicator	Approved Status
Mrs B Erkens	Administrator	944856				01/01/2014	Unknown.Non Paying	Approved

Personal
Profile
Events & Meets
Accreditation
Correspondence
History
Biometrics

This person

Mrs Becki Erkens (944856)

[Your settings](#) [Personal details](#)

[Remove from Card run](#) [Add to Basket](#)

Group List

[Edit](#)

Interests

Relationships

- Relationships
- Staff (Club)

Click on the Edit button in the Group List section.

Personal
Profile
Events & Meets
Accreditation
Correspondence
History
Biometrics

This person

Mrs Becki Erkens (944856)

[Your settings](#) [Personal details](#)

[Remove from Card run](#) [Add to Basket](#)

Group List

[Edit](#)

Interests

Relationships

- Relationships
- Staff (Club)

Tick the group you want to add the member into, then Save.

How do I approve a membership account?

Going forward, members will have one of two membership statuses:

1. Approved
2. Pending (Not Approved)

Approving a member's account acts as accepting that person's membership into your club. This process should be completed alongside or after the person has made their membership payment. Members renewing with their same club will automatically be approved when they complete their online membership payment, whereas brand-new members will need to be manually approved by the club Registrar to indicate their membership application has been accepted by the club.

Click the Club tab and begin typing the name of your club. Select your club from the drop down list.

Person
Club
Region
Zone

[10204] Okato
Swimming Taranaki | Star rating
Club

[Advanced](#) [Last Accessed](#)

Click on the Member tab to view a list of your members. Each member's approval status is located in the column on the far right-hand side of the listing.

Member No.	Forenames	Surname	Membership Type	Status	Approved
944881	Gdfsdfs	Zdffid	Club Swimmer	Active	Pending
358480	Emily A	Rennell	Competitive Swimmer	Active	Approved
361232	Janice	Rennell	Administrator	Active	Approved
321395	Sinead	Rennell	Competitive Swimmer	Active	Approved

To change a member's status click on the link in the Approved column for the person you are updating.

Member No.	Forenames	Surname	Membership Type	Status	Approved
944881	Gdfsdfs	Zdffid	Club Swimmer	Active	Pending
358480	Emily A	Rennell	Competitive Swimmer	Active	Approved
361232	Janice	Rennell	Administrator	Active	Approved
321395	Sinead	Rennell	Competitive Swimmer	Active	Approved

From the Approved Member Status screen, untick the Approval pending box and click save.

Approved Member Status

Pending Approval

Approval pending

Cancel Save

The member's status will now be updated in the members listing.

How do I create a new membership type?

Click the Club tab and begin typing the name of your club. Select your club from the drop down list.

Person **Club** Region Zone

ok


[10204] Okato Swimming Taranaki | Star rating Club

Advanced Last Accessed

Select Fees & Discounts.

Seq	Description ▲	Latest Date	Amount	Total
7	Administrator	01/07/2013	0.00	0.00
1	Club Swimmer	01/07/2013	0.00	0.00
5	Coach	01/07/2013	0.00	0.00
2	Competitive Swimmer	01/07/2013	0.00	0.00
3	Learn to Swim	01/07/2013	0.00	0.00
4	Life	01/07/2013	0.00	0.00
6	Non-Voting Technical Official	01/07/2013	0.00	0.00
8	Voting Technical Official	01/07/2013	0.00	0.00

Discount Packages

 No Data Available

Click the Add button located underneath the Current Annual Fees table.

The following settings need to be selected:

- Give the membership a name in the Member type field
- Ensure the membership aligns with the correct Region Member type.

Only available once the CMS is in place:

- To make this membership available to new members online (through Join page) ensure Valid- new member is ticked.
- To make this membership available to renewing members online ensure Valid-reinstatement is ticked.

Enter your club fee *only* in the Annual sub box, and then Save.

Annual Fee

* Member type	<input type="text"/>
Description	<input type="text"/>
Region Member type	<input type="text"/>
Member type	<input type="text"/>
Sub-total	0.00
Valid - new members	<input type="checkbox"/>
Valid - reinstatement	<input type="checkbox"/>
Obsolete	<input type="checkbox"/>
Period covered	to 30/12/1968
Annual sub	<input type="text"/>
Total this level	0.00

Parameters for junior fee type (optional)

Lower age limit	<input type="text"/>
Upper age limit	<input type="text"/>
Next Age Change to	<input type="text"/>

Renew as a different type (optional)

Renew As	<input type="text"/>
----------	----------------------

How do I lapse a member?

Note: You must remove the family tie if cannot lapse the member automatically.

You have to go to the member's profile and edit the subscription where you will then remove the Paid By link. Once this is clear then the member can be Lapsed and marked as Inactive.

How do I edit the descriptions of my membership types so they are club-specific?

Adding a Description to your club's membership types will help users to select the appropriate membership type when joining or renewing with your club through a Club, Regional, Zonal or National website.

Click the Club tab and begin typing the name of your club. Select your club from the drop down list.

Person **Club** Region Zone

[10204] Okato Swimming Taranaki | Star rating Club

[Advanced](#) [Last Accessed](#)

Open the **Fees & Discounts** tab - here you will see a list of Current Annual Fees.

Seq	Description ▲	Latest Date	Amount	Total
7	Administrator	01/07/2013	0.00	0.00
1	Club Swimmer	01/07/2013	0.00	0.00
5	Coach	01/07/2013	0.00	0.00
2	Competitive Swimmer	01/07/2013	0.00	0.00
3	Learn to Swim	01/07/2013	0.00	0.00
4	Life	01/07/2013	0.00	0.00
6	Non-Voting Technical Official	01/07/2013	0.00	0.00
8	Voting Technical Official	01/07/2013	0.00	0.00

Discount Packages

i No Data Available

Click the title of the membership type under the Description column that you wish to edit.

Annual Fee

* Member type:

Description:

Region Member type:

Member type:

Sub-total: 0.00

Valid - new members:

Valid - reinstatement:

Obsolete:

Period covered: 01/07/2013 to 30/06/2014

Annual sub:

Total this level: 0.00

Parameters for junior fee type (optional)

Lower age limit:

Upper age limit:

Next Age Change to:

Renew as a different type (optional)

Renew As:


To add a description to the membership type begin typing in the Description field. The text entered in this box will display to users when they join/renew online.

Annual Fee

* Member type	<input type="text" value="Club Swimmer"/>
Description	<input type="text"/>

Once you have finished editing select the 'Save' button at the bottom of the page.

You will see a message to advise the details have been updated once the save was successful. You can then Return to the previous page and complete the process for all other necessary membership types.

 The details have been updated.

Members will now be able to view a description of what each membership entitles them to do by hovering on the Info icon associated with each membership. **This is in the website component only.**

How does a Regional Administrator download a Membership List?

To get a list of members attached to a specific club linked to a region, do the following steps:

- Select region
- Goto the "club list"
- Select Club
- Goto the "member list"

If the member's Club is required for the full list it can be added to the download option (which has more fields than the table can display) – it may already be included.

How do I approve a member transfer?


Any pending transfers will appear underneath the search functionality or you can find it in the clubs Members tab and by clicking on the **Show pending Members** button.

Person Club Region Zone

[Advanced](#) [Last Accessed](#)

Pending Club Transfers

Name	From	Status	To	Status
Miss M [REDACTED]	Wharenui Swim Club	Approved	Selwyn Swim Club	Pending

CSV 

Member No.	Forenames	Surname	Membership Type	Status	Approved
[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Administrator	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved
[Redacted]	[Redacted]	[Redacted]	Competitive Swimmer	Active	Approved

Page 1 of 5 | 1 - 20 of 93 | Per page 20 | csv

Select the Approved status in the Pending Club Transfers section and untick the box then Save.

Member No.	Forenames	Surname	Membership Type	Status	Approved
[Redacted]	[Redacted]	[Redacted]	Club Swimmer	Active	<input type="checkbox"/> Pending <input type="checkbox"/> Approved

Approved Member Status

Pending Approval

Approval pending

Or click into the Member's profile (by clicking on the Member No.) and on the Personal tab, select Edit on the Approved Member Status section

Personal	Profile	Events & Meets	Accreditation	Correspondence	History	Biometrics
----------	---------	----------------	---------------	----------------	---------	------------

This person

Mr G [Redacted] ([Redacted])

[Add to Basket](#) [Personal details](#)

[Remove from Card run](#)

Web Access

Web User Id [Not set]
Password [Not set]

[Edit](#)

Status

✔ Record [Redacted] is currently active

[Lapse](#)

Contacts

Type	Email addresses
Personal	[Redacted]
Work	[Redacted]

Club

[Jasi Swim Club](#)
PO Box 29 064
Christchurch
8540

[Select](#)

Approved Member Status

Pending

[Edit](#)

Subscriptions

Untick the Approval pending box then click on Save.

Approved Member Status

Pending Approval

Approval pending

You will receive the following confirmation message.


 The details have been updated.

Membership Renewal Process for Clubs

Please follow the below steps to complete the renewal of your clubs membership.

1. Set you club membership fees
Before you start the renewal process you must set the membership fees for your different membership types. Click on the Fees & Discounts tab in your clubs profile on the database.

Seq	Description ^	Latest Date	Amount	Total	
7	Administrator	01/07/2014	0.00	0.00	
1	Club Swimmer	01/07/2014	0.00	0.00	
5	Coach	01/07/2014	0.00	25.00	
2	Competitive Swimmer	01/07/2014	0.00	85.00	
10	Friend of Swimming	01/07/2014	0.00	0.00	
3	Learn to Swim	01/07/2014	0.00	0.00	
4	Life	01/07/2014	0.00	0.00	
6	Non-Voting Technical Official	01/07/2014	0.00	0.00	
11	Recreational Swimmer	01/07/2014	0.00	0.00	
9	Volunteer	01/07/2014	0.00	0.00	
8	Voting Technical Official	01/07/2014	0.00	15.00	

CSV 

Then click on any of the membership types that you need to add a membership fee against and edit the following:

1. Click the box for a joiner and reinstatement
2. Ensure that the payable after date is 01/07/2014
3. Enter in your club fees for that membership type
4. Click on the recalculate button
5. Click save at the bottom of the page

Annual Fee


* Member type	<input type="text" value="Competitive Swimmer"/>			
Description	<input type="text"/>			
Region Member type	<input type="text" value="Competitive Swimmer"/>			
Valid for joiners	<input checked="" type="checkbox"/>			
Valid - reinstatement	<input checked="" type="checkbox"/>			
Obsolete	<input type="checkbox"/>			
Annual Subs				
Payable After	Club Fees	Other subs	Total	
<input type="text" value="01/07/2014"/>	<input type="text" value="65"/>	90.50	155.50	<input type="button" value="Delete"/>
<input type="text" value="dd/mm/yyyy"/>	<input type="text"/>			
<input type="button" value="Add"/>				
<input type="button" value="Recalculate"/>				

Note that if you have a pro rata payment where it changes throughout the membership year this can be added in this section. Add a start date for the new price to start and create as many of these as you have changes in charges.

2. Renew your membership
Once you are happy that all of your membership types are complete and accurate it is time to renew your membership. Move to the bottom of the page and click on the "Renewals" button.


Current Annual Fees

Seq	Description ^	Latest Date	Amount	Total	
7	Administrator	01/07/2014	0.00	0.00	
1	Club Swimmer	01/07/2014	0.00	0.00	
5	Coach	01/07/2014	0.00	25.00	
2	Competitive Swimmer	01/07/2014	0.00	90.50	
10	Friend of Swimming	01/07/2014	0.00	0.00	
3	Learn to Swim	01/07/2014	0.00	0.00	
4	Life	01/07/2014	0.00	0.00	
6	Non-Voting Technical Official	01/07/2014	0.00	0.00	
11	Recreational Swimmer	01/07/2014	0.00	0.00	
9	Volunteer	01/07/2014	0.00	0.00	
8	Voting Technical Official	01/07/2014	0.00	15.00	

csv 


Add

Discount Packages

 No Data Available

Add

Obsolete Annual Fees

 No Data Available


Calculate Subscriptions


Renewals

Recalculate

One clicking this you will be asked to confirm the period in which you are renewing for. This will automatically be set to the current membership year. If this is correct click on calculate.

Start and End Dates

First Renewal 01/07/2014 

Last Renewal 30/06/2015 

Cancel **Calculate**

Last Run Details

Started on
Started at
Started by
Number of members

Click to confirm that you want to renew.

Please confirm calculation

The database will then tell you the number of subscriptions that have been calculated.

3. Update you members Financial Status

You can now access each members profile and update their financial status through the members tab in your clubs profile. In the image below you can see that each member Financial status is now un-financial for all paying membership types.

Member No.	Forenames	Surname	Membership Type	Financial	Status	Approved	Paid by
348151			Competitive Swimmer	Unfinancial	Active	Approved	Self
311161			Competitive Swimmer	Unfinancial	Active	Approved	Self
304101			Administrator	Non Paying	Active	Approved	Self
390140			Competitive Swimmer	Unfinancial	Active	Approved	Self
375985			Competitive Swimmer	Unfinancial	Active	Approved	Self
375986			Competitive Swimmer	Unfinancial	Active	Approved	Self
390129			Competitive Swimmer	Unfinancial	Active	Approved	Self
392067			Competitive Swimmer	Unfinancial	Active	Approved	Self
361682			Competitive Swimmer	Unfinancial	Active	Approved	Self
390143			Competitive Swimmer	Unfinancial	Active	Approved	Self
375987			Competitive Swimmer	Unfinancial	Active	Approved	Self
361687			Competitive Swimmer	Unfinancial	Active	Approved	Self
347838			Competitive Swimmer	Unfinancial	Active	Approved	Self
314149			Competitive Swimmer	Unfinancial	Active	Approved	Self
390146			Competitive Swimmer	Unfinancial	Active	Approved	Self
375990			Competitive Swimmer	Unfinancial	Active	Approved	Self
390148			Competitive Swimmer	Unfinancial	Active	Approved	Self
314152			Competitive Swimmer	Unfinancial	Active	Approved	Self
390150			Competitive Swimmer	Unfinancial	Active	Approved	Self
390151			Competitive Swimmer	Unfinancial	Active	Approved	Self

There are two parts to making the members financial status "financial". First the individuals member type for the new period needs to be confirmed. This can be done by clicking on the membership type next to the individuals name. That will show you the below screen:

Subscriptions

* Type 2014	<input type="text" value="Competitive Swimmer"/>
Pay Method 2014	Cheque / Cash
Type 2015	<input type="text" value="Competitive Swimmer"/>
Pay Method 2015	<input type="text" value="Cheque / Cash"/>
Renewal date	01/07/2015
* Effective date	<input type="text" value="20/08/2014"/>
Paid By	<input type="text"/>

In here you can select the following:

- 2015 Membership type
- 2015 Payment method
- Effective date – this will default to the date of the day you are processing the membership, this can be backdated to the actual date given that this year's roll over has been delayed.

Click save twice and return to the membership list. You can now go into the members profile page by clicking on their membership number next to their name in the membership list. This will show you the members profile as you can see below.

Things to note in the below image is that the members profile is displaying that they are unfinancial on the status bar, it displayed the different components of the membership fee based on what you have entered for your club and what has come through from the regional and national fees and you have the ability to pay the membership fees to make the member financial.

Mailname	Membership Type	Membership Number	Meet Manager	Date of Birth	Age	Join date	Indicator	Approved Status
[REDACTED]	Competitive Swimmer	381522	[REDACTED]	[REDACTED]	[REDACTED]	27/09/2012	Unfinancial	Approved

Personal
Profile
Events & Meets
Accreditation
Correspondence
History
Documents
Biometrics

This person

[REDACTED] (381522)

[Add to Basket](#) [Personal details](#)
[Add to Card run](#)

Contacts

Type	Email addresses
Personal	[REDACTED]

[Log received email](#) [Send quick email](#)

Type	Telephone
Mobile	[REDACTED]
Telephone	[REDACTED]

[Log incoming call](#) [Log outgoing call](#)
[Edit contact details](#)

Personal Address

Address [REDACTED]
[REDACTED]
[REDACTED]

Post Code [REDACTED]

[Edit](#)

Meet Manager

Meet Manager [REDACTED]
[REDACTED]
[REDACTED]

[Edit](#)

Web Access

Web User Id [Not set]
Password [Not set]

[Edit](#)

Club

[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]
[REDACTED]

[Select](#)

Region

[REDACTED] (code: [REDACTED])
(normally derived from Club)

Medical Information

[Edit](#)

Status

✔ Record 381522 is currently active

[Lapse](#)

Approved Member Status

Approved

[Edit](#)

Subscriptions

Type	Competitive Swimmer
Pay Method	Cheque / Cash
Paid By	

Description	Value
Club subscriptions	65.00
Region / National	85.00
Total	150.00

Subs due today 150.00

Total due 150.00

Discount 0.00

Discounted Amount 150.00

[Manual pay](#) [Pay Now](#) [Transactions](#) [Edit](#)
[Send Payment Email](#)

There currently isn't the ability to "Pay Now" that is a card payment but you can process a manual payment which could be a cash or cheque payment for the members that you have already received membership fees from. Click on manual pay to do this.

You will then see this screen.

Subs details

Total subscription amount due: 150.00

* Payment method Cheque
 Cash
 Manual C.Card

* Receipt date

* Amount paid now

Ensure that you select the payment method, the date of receipt and if only a part payment indicate the amount th Membership Renewal Process for Clubs

Please follow the below steps to complete the renewal of your clubs membership.

4. Set you club membership fees

Before you start the renewal process you must set the membership fees for your different membership types. Click on the Fees & Discounts tab in your clubs profile on the database.

Seq	Description ^	Latest Date	Amount	Total
7	Administrator	01/07/2014	0.00	0.00
1	Club Swimmer	01/07/2014	0.00	0.00
5	Coach	01/07/2014	0.00	25.00
2	Competitive Swimmer	01/07/2014	0.00	85.00
10	Friend of Swimming	01/07/2014	0.00	0.00
3	Learn to Swim	01/07/2014	0.00	0.00
4	Life	01/07/2014	0.00	0.00
6	Non-Voting Technical Official	01/07/2014	0.00	0.00
11	Recreational Swimmer	01/07/2014	0.00	0.00
9	Volunteer	01/07/2014	0.00	0.00
8	Voting Technical Official	01/07/2014	0.00	15.00

Then click on any of the membership types that you need to add a membership fee against and edit the following:

6. Click the box for a joiner and reinstatement
7. Ensure that the payable after date is 01/07/2014
8. Enter in your club fees for that membership type
9. Click on the recalculate button
10. Click save at the bottom of the page

Annual Fee

* Member type	<input type="text" value="Competitive Swimmer"/>			
Description	<input type="text"/>			
Region Member type	<input type="text" value="Competitive Swimmer"/>			
Valid for joiners	<input checked="" type="checkbox"/>			
Valid - reinstatement	<input checked="" type="checkbox"/>			
Obsolete	<input type="checkbox"/>			
Annual Subs				
Payable After	Club Fees	Other subs	Total	
<input type="text" value="01/07/2014"/>	<input type="text" value="65"/>	90.50	155.50	<input type="button" value="Delete"/>
<input type="text" value="dd/mm/yyyy"/>	<input type="text"/>			
<input type="button" value="Add"/>				
<input type="button" value="Recalculate"/>				


Note that if you have a pro rata payment where it changes throughout the membership year this can be added in this section. Add a start date for the new price to start and create as many of these as you have changes in charges.

5. Renew your membership

Once you are happy that all of your membership types are complete and accurate it is time to renew your membership. Move to the bottom of the page and click on the "Renewals" button.


Current Annual Fees

Seq	Description ^	Latest Date	Amount	Total	
7	Administrator	01/07/2014	0.00	0.00	
1	Club Swimmer	01/07/2014	0.00	0.00	
5	Coach	01/07/2014	0.00	25.00	
2	Competitive Swimmer	01/07/2014	0.00	90.50	
10	Friend of Swimming	01/07/2014	0.00	0.00	
3	Learn to Swim	01/07/2014	0.00	0.00	
4	Life	01/07/2014	0.00	0.00	
6	Non-Voting Technical Official	01/07/2014	0.00	0.00	
11	Recreational Swimmer	01/07/2014	0.00	0.00	
9	Volunteer	01/07/2014	0.00	0.00	
8	Voting Technical Official	01/07/2014	0.00	15.00	

csv 


Add

Discount Packages

 No Data Available

Add

Obsolete Annual Fees

 No Data Available


Calculate Subscriptions


Renewals

Recalculate

One clicking this you will be asked to confirm the period in which you are renewing for. This will automatically be set to the current membership year. If this is correct click on calculate.

Start and End Dates

First Renewal 01/07/2014 

Last Renewal 30/06/2015 

Cancel **Calculate**

Last Run Details

Started on
Started at
Started by
Number of members

Click to confirm that you want to renew.

Please confirm calculation

The database will then tell you the number of subscriptions that have been calculated.

6. Update you members Financial Status

You can now access each members profile and update their financial status through the members tab in your clubs profile. In the image below you can see that each member Financial status is now un-financial for all paying membership types.

The screenshot shows a web application interface with a navigation bar at the top containing tabs: Details, Members (highlighted), Committee, Documents, History, Correspondence, Fees & Discounts, and Groups. Below the navigation bar is a section titled "Active Members" containing a table with the following columns: Member No., Forenames, Surname, Membership Type, Financial, Status, Approved, and Paid by. The table lists 20 members, all of whom are "Competitive Swimmer" and have their "Financial" status set to "Unfinancial". The first row (Member No. 348151) has "Unfinancial" highlighted in yellow. At the bottom of the table, there is a pagination control showing "Page 1 of 10" and "1 - 20 of 194 | Per page 20".

Member No.	Forenames	Surname	Membership Type	Financial	Status	Approved	Paid by
348151	[REDACTED]	[REDACTED]	Competitive Swimmer	Unfinancial	Active	Approved	Self
311161	[REDACTED]	[REDACTED]	Competitive Swimmer	Unfinancial	Active	Approved	Self
304101	[REDACTED]	[REDACTED]	Administrator	Non Paying	Active	Approved	Self
390140	[REDACTED]	[REDACTED]	Competitive Swimmer	Unfinancial	Active	Approved	Self
375985	[REDACTED]	[REDACTED]	Competitive Swimmer	Unfinancial	Active	Approved	Self
375986	[REDACTED]	[REDACTED]	Competitive Swimmer	Unfinancial	Active	Approved	Self
390129	[REDACTED]	[REDACTED]	Competitive Swimmer	Unfinancial	Active	Approved	Self
392067	[REDACTED]	[REDACTED]	Competitive Swimmer	Unfinancial	Active	Approved	Self
361682	[REDACTED]	[REDACTED]	Competitive Swimmer	Unfinancial	Active	Approved	Self
390143	[REDACTED]	[REDACTED]	Competitive Swimmer	Unfinancial	Active	Approved	Self
375987	[REDACTED]	[REDACTED]	Competitive Swimmer	Unfinancial	Active	Approved	Self
361687	[REDACTED]	[REDACTED]	Competitive Swimmer	Unfinancial	Active	Approved	Self
347838	[REDACTED]	[REDACTED]	Competitive Swimmer	Unfinancial	Active	Approved	Self
314149	[REDACTED]	[REDACTED]	Competitive Swimmer	Unfinancial	Active	Approved	Self
390146	[REDACTED]	[REDACTED]	Competitive Swimmer	Unfinancial	Active	Approved	Self
375990	[REDACTED]	[REDACTED]	Competitive Swimmer	Unfinancial	Active	Approved	Self
390148	[REDACTED]	[REDACTED]	Competitive Swimmer	Unfinancial	Active	Approved	Self
314152	[REDACTED]	[REDACTED]	Competitive Swimmer	Unfinancial	Active	Approved	Self
390150	[REDACTED]	[REDACTED]	Competitive Swimmer	Unfinancial	Active	Approved	Self
390151	[REDACTED]	[REDACTED]	Competitive Swimmer	Unfinancial	Active	Approved	Self

There are two parts to making the members financial status "financial". First the individuals member type for the new period needs to be confirmed. This can be done by clicking on the membership type next to the individuals name. That will show you the below screen:

Subscriptions

* Type 2014	<input type="text" value="Competitive Swimmer"/>
Pay Method 2014	Cheque / Cash
Type 2015	<input type="text" value="Competitive Swimmer"/>
Pay Method 2015	<input type="text" value="Cheque / Cash"/>
Renewal date	01/07/2015
* Effective date	<input type="text" value="20/08/2014"/>
Paid By	<input type="text"/>

In here you can select the following:

- 2015 Membership type
- 2015 Payment method
- Effective date – this will default to the date of the day you are processing the membership, this can be backdated to the actual date given that this year's roll over has been delayed.

Click save twice and return to the membership list. You can now go into the members profile page by clicking on their membership number next to their name in the membership list. This will show you the members profile as you can see below.

Things to note in the below image is that the members profile is displaying that they are un-financial on the status bar, it displayed the different components of the membership fee based on what you have entered for your club and what has come through from the regional and national fees and you have the ability to pay the membership fees to make the member financial.

Mailname	Membership Type	Membership Number	Meet Manager	Date of Birth	Age	Join date	Indicator	Approved Status
[Redacted]	Competitive Swimmer	381522	[Redacted]	[Redacted]	[Redacted]	27/09/2012	Unfinancial	Approved

This person

[Redacted] (381522)

[Add to Basket](#) [Personal details](#)
[Add to Card run](#)

Meet Manager

Meet Manager [Redacted]

[Edit](#)

Status

✔ Record 381522 is currently active

[Lapse](#)

Contacts

Type: Personal, Email addresses: [Redacted]

[Log received email](#) [Send quick email](#)

Type: Mobile, Telephone: [Redacted]

[Log incoming call](#) [Log outgoing call](#)
[Edit contact details](#)

Web Access

Web User Id: [Not set]
Password: [Not set]

[Edit](#)

Approved Member Status

Approved

[Edit](#)

Personal Address

Address: [Redacted]
Post Code: [Redacted]

[Edit](#)

Club

[Redacted]

[Select](#)

Subscriptions

Type: Competitive Swimmer
Pay Method: Cheque / Cash
Paid By:

Description	Value
Club subscriptions	65.00
Region / National	85.00
Total	150.00

Subs due today: 150.00
Total due: 150.00
Discount: 0.00
Discounted Amount: 150.00

[Manual pay](#) [Pay Now](#) [Transactions](#) [Edit](#)
[Send Payment Email](#)

Region

[Redacted] (code: [Redacted])
(normally derived from Club)

Medical Information

[Edit](#)

There currently isn't the ability to "Pay Now" that is a card payment but you can process a manual payment which could be a cash or cheque payment for the members that you have already received membership fees from. Click on manual pay to do this.

You will then see this screen.

Subs details

Total subscription amount due: 150.00

* Payment method Cheque
 Cash
 Manual C.Card

* Receipt date

* Amount paid now

Ensure that you select the payment method, the date of receipt and if only a part payment indicate the amount that has been paid. Note that the member will not become financial until the full amount is paid. Once you have done this click next.

You will then see the below screen.

Payment confirmation

⚠ Please check these details carefully, and use the 'Back' button if you need to change them. A total of 150.00 will be applied to the member's record when you click 'Confirm payment'.

Total owing	This payment	Payment method
150.00	150.00	Cheque

* Please confirm that the member is paying the full amount owing

By clicking the check box and pressing the record payment button you are confirming that payment has been received and if the full payment has been made the members profile will then be financial. at has been paid. Note that the member will not become financial until the full amount is paid. Once you have done this click next.

You will then see the below screen.

Payment confirmation

⚠ Please check these details carefully, and use the 'Back' button if you need to change them. A total of 150.00 will be applied to the member's record when you click 'Confirm payment'.

Total owing	This payment	Payment method
150.00	150.00	Cheque

* Please confirm that the member is paying the full amount owing

By clicking the check box and pressing the record payment button you are confirming that payment has been received and if the full payment has been made the members profile will them be financial.

Pro Rata Membership Fees

There is also now the ability to set up pro rata fee payments for clubs membership fees. See below:

Annual Fee

* Member type	<input type="text" value="Competitive Swimmer"/>			
Description	<input type="text"/>			
Region Member type	<input type="text" value="Competitive Swimmer"/>			
Valid for joiners	<input checked="" type="checkbox"/>			
Valid - reinstatement	<input type="checkbox"/>			
Obsolete	<input type="checkbox"/>			
Annual Subs				
Payable After	Club Fees	Other subs	Total	
<input type="text" value="01/07/2014"/>	<input type="text" value="80"/>	90.50	170.50	<input type="button" value="Delete"/>
<input type="text" value="01/01/2015"/>	<input type="text" value="60"/>	90.50	150.50	<input type="button" value="Delete"/>
<input type="text" value="01/04/2015"/>	<input type="text" value="40"/>	90.50	130.50	<input type="button" value="Delete"/>
<input type="text" value="dd/mm/yyyy"/>	<input type="text"/>			
<input type="button" value="Add"/>				
<input type="button" value="Recalculate"/>				

Parameters for junior fee type (optional)

Lower age limit	<input type="text"/>
Upper age limit	<input type="text"/>
Next Age Change to	<input type="text"/>

Renew as a different type (optional)

Renew As	<input type="text"/>
----------	----------------------

A club can set different fees based on the date that the renewal takes place. They will set up the full fee from 1/07/2014, but then they are also able to set up other fees rates that will be charged if membership starts at a later date in the membership year. Given the example above if a swimmer was to join on 2nd January 2015 it would only charge them \$150.50 rather than \$170.50.

This is only relevant for club membership fees, not regional or national fees.

Fees & Discounts

NOTE:

The discounting mechanism is a club facility. It is designed for clubs to be able to provide groups with discounted subscriptions based on the number of people and their

membership type. The discount applies to the club element of the subscription only. Hence is a structure such as this:

National	10
Regional/State	20
Group/Region	30
Club	40

A 10% discount would be \$4.00 being only the club element that is discounted.

Equally the \$4.00 will be deducted from the amount for the club.

NOTE:

The discount can be set to be a percentage or an amount. The percentage will always be that percentage of the club element, if the percentage is ignored and the amount is entered the discount will be the lower of the amount stated and the amount for the club. So the three members with the structure above would gain a \$75 discount if that was entered on the discount structure but would only get \$120 discount if an amount above \$120 was entered since this is more than the amount being paid to the club.

Setup

The starting screen allows you to define the package that the family or group must match to get the discount.

NOTE: The name can be anything, it has no relevance to the package hence this one is called 4 swimmers but actually is 4 recreational swimmers and a competitive swimmer. That is user choice as to what it is called.

Discount Package

* Name	<input type="text" value="4 swimmer"/>
--------	--

Discount Package

Member Type	Number	
<input type="text" value="Recreational Swimmer"/>	<input type="text" value="4"/>	<input type="button" value="Delete"/>
<input type="text" value="Competitive Swimmer"/>	<input type="text" value="1"/>	<input type="button" value="Delete"/>
<input type="text"/>	<input type="text"/>	

The second screen defines the discount to apply, There are two options as to how this is done:

Specify Percentage: In this mechanism you know the percentage that you want to apply, you enter that percentage into the field and click on Recalculate. The system will work out the amount to apply and will display it in the Discount field.

Discount

Percentage (optional)	<input type="text" value="10"/>
<input type="button" value="Recalculate"/>	
Standard Fee	447.00
Discount	<input type="text" value="13.2"/>
Total	433.80

Specify Amount: If the aim is to discount by a specified amount then leave the percentage box blank, go to the Discount field and enter the amount.

Discount

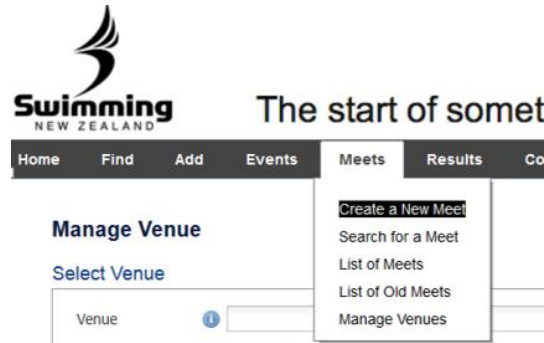
Percentage (optional)	<input type="text"/>
<input type="button" value="Recalculate"/>	
Standard Fee	447.00
Discount	<input type="text" value="20"/>
Total	427.00

NOTE: There is no check on the amount of discount entered at this time. If the amount entered as the discount is more than the amount being charged by the club then this will be allowed here but will be limited when the payment is made.

MEETS

How do I set up a meet?

Click the Meets tab and select Create A New Meet



The Create A New Meet page will display. Type the title of your meet and select Save.

If you have existing meets in the system, and the meet you are creating has the exact same Meet Manager set up.

You can copy a previous meet by typing the name of the meet in the Copy from... text box.

Create a new Meet

* Title

Copy from...

Security

⚠ Your current active role is National

Save

The Security box will display which role you are currently logged in as, in order to ensure you are creating a meet in your correct portal (for administrators who have hold both regional and club committee roles).

Complete each of the fields on the Main Details screen.

Main details

* Title	<input type="text" value="Test"/>
---------	-----------------------------------

Dates

* Meet Date From	<input type="text" value="dd/mm/yyyy"/>
* Meet Date To	<input type="text" value="dd/mm/yyyy"/>
Entry Start Date	<input type="text" value="dd/mm/yyyy"/>
Entry Start Time	<input type="text" value="hh:mm:ss"/>
Entry End Date	<input type="text" value="dd/mm/yyyy"/>
Entry End Time	<input type="text" value="hh:mm:ss"/>
Time Zone	<input type="text"/>

Venue

Venue	<input type="text"/>
-------	----------------------

Meet Contact

Organiser	<input type="text"/>
Organiser's email	<input type="text"/>

Main Details screen fields explained:

Title:	Auto-populated from text entered into Create A New Meet screen
Meet Date From:	First day of the meet
Meet Date To:	Last day of the meet
Entry Start Date:	Date that online entries will automatically open
Entry Start Time:	Exact time that online entries will automatically open
Entry End Date:	Date that online entries will become unavailable
Entry End Time:	Exact time that online entries will become unavailable
Venue:	Venue must be selected from a list of pre-set up venues.
Organiser:	Event Organisers Name
Organiser's email:	Event Organisers email

Once all fields have been completed, select Save.

You will receive the following confirmation screen upon completion. If you are accepting online entries for this meet, select the View button.

Meet created...

✓ The Meet 'Test' (code = 000247) has been created...

You may now continue to view this new Meet and add or edit various details by clicking the button below.

If you choose not to do so now, you can find the Meet later from the 'Search...' option on the Meets menu, then click 'Manage'.

[View Event](#)

You will be taken to the below screen.

Meet	From	To	Venue
Test	22/05/2014	22/05/2014	

[Details](#) [Settings](#) [Meet Manager](#) [Competitors](#) [Fees](#) [Web display](#) [Competitive Events](#) [Notes](#) [Open To](#) [T and C's](#)

Main details

Event Code	000247
Title	Test
Course	

Venue

Specific venue

Dates

From Date	22/05/2014
To Date	22/05/2014
Entry Start Date	
Entry Start Time	
Entry End Date	
Entry End Time	
Time Zone	
Show in web calendar	Yes
Allow web booking	

Contact

Organiser	Becki
Organiser's email	tech@swimmingnz.org.nz

[Cancel](#) [Edit](#)

If you would like this meet to display in your website calendar, click Edit and change Show in Web Calendar to Yes, then Save.

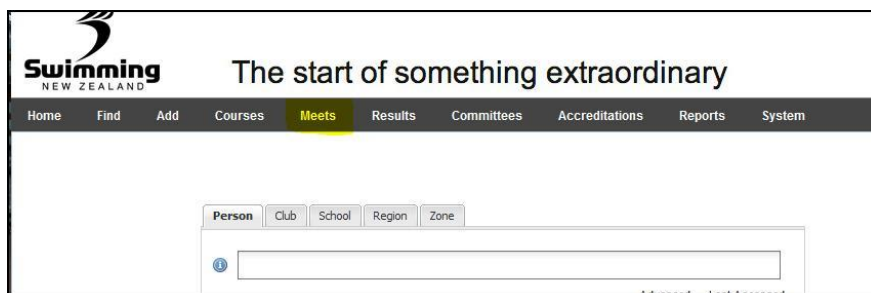
Dates

* From Date	<input type="text" value="22/05/2014"/>	<input type="button" value="📅"/>
* To Date	<input type="text" value="22/05/2014"/>	<input type="button" value="📅"/>
Entry Start Date	<input type="text" value="dd/mm/yyyy"/>	<input type="button" value="📅"/>
Entry Start Time	<input type="text" value="hh:mm:ss"/>	
Entry End Date	<input type="text" value="dd/mm/yyyy"/>	<input type="button" value="📅"/>
Entry End Time	<input type="text" value="hh:mm:ss"/>	
Time Zone	<input type="text"/>	<input type="button" value="▼"/>
Show in web calendar	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Allow web booking	<input type="radio"/> Yes	<input type="radio"/> No

From here you can follow the instructions on how to set up a meet to accept Online Entries **(only available once the CMS is in place)**.

Entering Swimmers into Meets as a Club Administrator

1. After Logging into the database, hover over the "Meets" tab, this should bring up a number of different options including "List of Meets", click into this.



2. Once in here you will have the option to see your current meets, your old meets and also meets that are owned by other clubs, regions and SNZ if they have been set to being open to your club. For entry into a national meet click on the "Current Meets (open to)" button.



- This will then bring up a list of meets that you can enter swimmers into from your club, select the meet you want by clicking on its name

Current Meets open to QEII Swim Club

Meet Title - click to view	Start date	Days	Venue	Owned by	Show?	Book?
2015 Victorian Open Championships	16/01/2015	3	Melbourne Sports and Aquatic Centre	Open/National	Y	N
2015 NSW 10 Years & Under - 12 Years State Age Cham...	16/01/2015	1	Sydney Olympic Park Aquatic Centre	Open/National	Y	N
Swimming Wellington 2015 LC Summer Champs	16/01/2015	4	Wellington Regional Aquatic Centre	Swimming Wellington	Y	N
2015 NSW 13-18 Years State Age Championships	19/01/2015	6	Sydney Olympic Park Aquatic Centre	Open/National	Y	N
Swim BOP Long Course Champs	24/01/2015	1	Rotorua Aquatic Centre	Swimming Bay of Plenty	Y	N
Swim Rotorua Long Course	24/01/2015	1	Rotorua Aquatic Centre	Swim Rotorua	Y	N
SNM Age Groups 2015 - Long Distance Events	31/01/2015	1	Stadium 2000 Blenheim	Swimming Nelson Marlbor...	Y	Y
Signature 2 Upper Hutt Meet 2015	31/01/2015	1	Wellington Regional Aquatic Centre	Swimming Wellington	Y	Y
BSC Summer Meet	31/01/2015	1	Stadium 2000	Blenheim Swimming Club	Y	N
SNM Age Group Championships 2015	07/02/2015	1	Nayland Pool	Swimming Nelson Marlbor...	Y	Y
Bream Bay Northport Carnival	07/02/2015	1		Bream Bay Swim Club	Y	Y
2015 Zonal Championship	08/02/2015	1	Westwave Aquatic Centre	Open/National	Y	N
Swim BOP Rising Stars	08/02/2015	1		Swimming Bay of Plenty	Y	N
Dive Right In	15/02/2015	1	Stadium 2000	Blenheim Swimming Club	Y	N
2015 New Zealand Junior Championship	20/02/2015	3	Wellington Regional Aquatic Centre	Open/National	Y	Y
2015 NSW State Open Championships	27/02/2015	3	Sydney Olympic Park Aquatic Centre	Open/National	Y	Y
SW Qualifier Meet	07/03/2015	1	Wellington Regional Aquatic Centre	Swimming Wellington	Y	N
Swim BOP Relays	08/03/2015	1	Rotorua Aquatic Centre	Swimming Bay of Plenty	Y	N
BSC Autumn Meet	14/03/2015	1	Stadium 2000	Blenheim Swimming Club	Y	N
Metro League 1 2015	15/03/2015	1		Swimming Wellington	Y	N

Page 1 of 2 | 1 - 20 of 34 | Per page 20 | csv

Current Meets (owned by) | Old Meets (owned by) | Old Meets (open to)

- Once you have clicked on the meet it will take you to the meet page with various pieces of information about the meet. All information will be locked to administrators other than the owner of the meet. To enter swimmers into the meet click on the "Competitors" tab.

Meet: **2015 New Zealand Junior Championship** From: 20/02/2015 To: 22/02/2015 Venue: Wellington Regional Aquatic Centre

[Details](#) | [Settings](#) | [Competitors](#) | [Fees](#) | [Web display](#) | [Competitive Events](#) | [Notes](#) | [Open To](#) | [T and C's](#) | [Documents](#) | [Reports](#)

Main details

Course Code	000282
Title	2015 New Zealand Junior Championship
Type	Championship
Status	Confirmed
Course	Long Course

Venue

General location	Wellington
Specific venue	Wellington Regional Aquatic Centre

Dates

From Date	20/02/2015
To Date	22/02/2015
Entry Start Date	
Entry Start Time	
Entry End Date	09/02/2015
Entry End Time	23:59:59
Show in web calendar	Yes
Allow web booking	Yes

5. Once you have clicked on the competitors tab the following page will appear asking you to enter an individual or enter a relay. This page will also display what swimmers are entered into the meet from your club. Click on the "Enter Individual" button.

Meet	From	To	Venue
2015 New Zealand Junior Championship	20/02/2015	22/02/2015	Wellington Regional Aquatic Centre

Details	Settings	Competitors	Fees	Web display	Competitive Events	Notes	Open To	T and C's	Documents	Reports
---------	----------	--------------------	------	-------------	--------------------	-------	---------	-----------	-----------	---------

i There are no Competitors to display

Enter Individual

Cancellations

i There are no cancellations to display

Enter Relay

6. Once you have clicked on "Enter Individual" a box will appear asking you to enter the swimmers name, once you have done this click the "Book" button.

Meet	From	To	Venue
2015 New Zealand Junior Championship	20/02/2015	22/02/2015	Wellington Regional Aquatic Centre

Select Swimmer to enter

* Member: **Book**

Cancel

- This will then bring up a page of events that the swimmer has and has not qualified for. to enter them into an event they qualify for click on the drop down next to that event and click yes. Please note that the number next to the "Yes" is the price of entry into that meet. Once you have selected all the events that you want to enter the swimmer in click proceed down the bottom of the page.

Events you qualify for

Event Number	Event	Your best time	Qualifying Time	Type	Enter Event
72-72	Boys, 11 Year Olds, 100 Breaststroke	1:33.42 (C)	Below 1:36.50 (S)	Standard	No
6-6	Boys, 11 Year Olds, 50 Breaststroke	43.38 (C)	Below 44.65 (S)	Standard	No

Events you do not qualify for

Event Number	Event	Your best time	Qualifying time	Type
2-2	Boys, 12 & Under, 400 Freestyle		Below 5:25.00 (L)	Standard
12-12	Boys, 11 Year Olds, 200 Backstroke		Below 3:00.29 (L)	Standard
18-18	Boys, 11 Year Olds, 100 Butterfly		Below 1:28.10 (L)	Standard
24-24	Boys, 12 & Under, 400 IM		Below 6:11.20 (L)	Standard
28-28	Boys, 11 Year Olds, 50 Freestyle		Below 32.73 (L)	Standard
34-34	Boys, 11 Year Olds, 200 Breaststroke	3:32.14	Below 3:28.50 (L)	Standard
40-40	Boys, 11 Year Olds, 50 Backstroke		Below 39.60 (L)	Standard
46-46	Boys, 11 Year Olds, 200 Freestyle		Below 2:39.11 (L)	Standard
52-52	Boys, 11 Year Olds, 50 Butterfly		Below 39.10 (L)	Standard
58-58	Boys, 11 Year Olds, 100 Backstroke		Below 1:24.25 (L)	Standard
66-66	Boys, 11 Year Olds, 200 IM		Below 3:02.70 (L)	Standard
78-78	Boys, 11 Year Olds, 100 Freestyle		Below 1:12.71 (L)	Standard
82-82	Boys, 12 & Under, 200 Butterfly		Below 3:07.20 (L)	Standard

Cancel Proceed

8. A "Booking Details" page will then appear. This shows a summary of what events the swimmer has been entered in and the total cost to pay. You have two options in terms of paying, that is either pay now or pay later. If you choose pay now you will have to pay by credit card if you choose pay later we will send an invoice out to your club. To choose either of these options click on the drop down. Once your option has been chosen click the proceed to payment button.

Booking details

⚠ Please check these details carefully, and use the 'Back' button if you need to change them. The total fee due is 36.05 - please select your preferred option below and click 'Continue'.

Pay Now (card payment on the next page) ▼

Event	Fee
72 Boys, 11 Year Olds, 100 Breaststroke	17.50
6 Boys, 11 Year Olds, 50 Breaststroke	17.50

Mail name
[REDACTED]

i The information below shows how the total fee of 36.05 is calculated.

Meet fee	0.00
Events fee(s)	35.00
Surcharge	1.05
Total to pay	36.05

[Back](#) [Proceed to Payment](#)

9. Once you have clicked proceed to payment, if you are paying now by credit card the following page will appear where you can enter your credit card details. Once you have done this and clicked continue and the payment has been accepted the swimmer will be successfully entered in the meet.

Please enter your credit or debit card details to complete the payment.
The name and address given must match those on the card statement.

Card details

Amount to pay: 36.05

* Card name

* Card number

* Card type

Issue

Valid from

* Expiry date

* Security code

* Address

Suburb

* City

* Postcode

The swimmer will now be entered into the meet and display in the competitors list on the meet page.

Swimming NEW ZEALAND

HOME MEDIA HIGH PERFORMANCE COMMUNITY

2015 NZ Junior Championship

Wellington Regional Aquatic Centre

2015 NZ Junior Championship

Some of the future stars of the event will be competing in the 10 & Under 100m Freestyle

Register Online

Schedule [view schedule](#)

Merchandise [view items](#)

TM Event File V2 - Amended 28 November

Meet Detail Page

2015 New Zealand Junior Championship

VENUE Wellington Regional Aquatic Centre

ORGANISER Open/National

CONTACT Swimming New Zealand Entries close 09/02/2015 23:59

EMAIL events@swimmingnz.org.nz

Meet Information

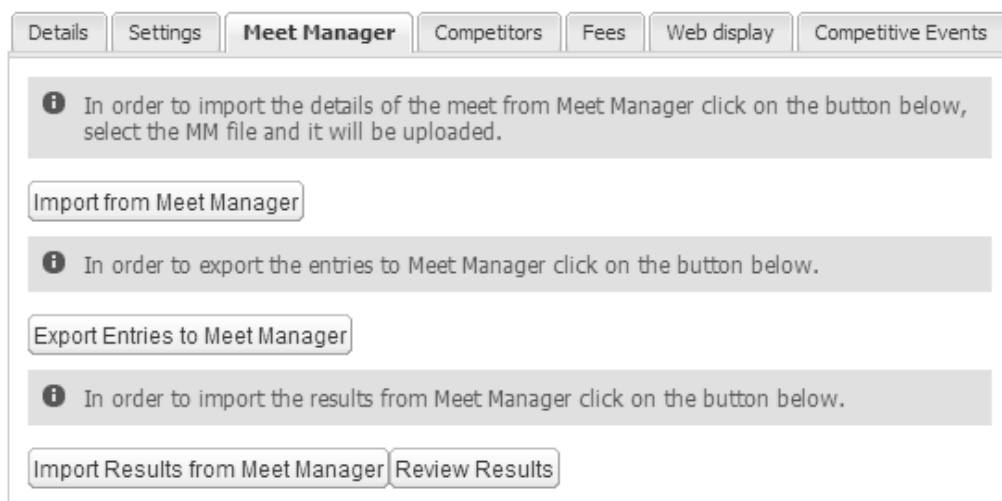
For further information about this event, please contact us

How do I export events from Meet Manager to upload into the database?

In Meet Manager, export your events using the 'Events for TM' process under the File -> Export menu, illustrated below.



Create your basic meet, as outlined in [How do I set up a meet in ClubLANE?](#). Once your meet is created, click the Meet Manager tab then select the 'Import from Meet Manager button'.



You can import the Meet Manager Events file (.zip) using two different methods:
a) Select the Add File button and then locate the file on your computer
b) Locate the Meet Events Zip file on your computer and drag it into the Drag Files Here

box

Upload Swimming Event

Select Meet File

Add file to the upload queue and click the start button.

Filename

Drag files here.

Meet File Name :
Meet Name :
Meet Start Date :
Meet Facility :
Meet Course :
Meet Event Count :

* Please ensure this is the correct file

You will receive confirmation that the upload was successful. The confirmation screen also shows you the details of the meet that you have just uploaded. After reviewing these details, ensuring they are all correct, Tick the 'Please ensure this is the correct file' box and select Submit.

Upload Swimming Event

i Upload of "Meet Events-2012 McDonald-s Qld Swimming Championships-15Dec2012-001.zip" successful ✖

Filename	Status	Size
Meet Events-2012 McDonald-s Qld Swimming Championships-15Dec2012-001.zip	100%	5 KB ✔

100% 5 KB

Meet File Name : Meet Events-2012 McDonald-s Qld Swimming Championships-15Dec2012-001.zip
 Meet Name : 2012 McDonald's Qld Swimming Championships
 Meet Start Date : 15/12/2012
 Meet Facility : Brisbane Aquatic Centre
 Meet Course : Long Course
 Meet Event Count : 194

* Please ensure this is the correct file

Select the Competitive Events tab to review the Meet Events you have just uploaded.

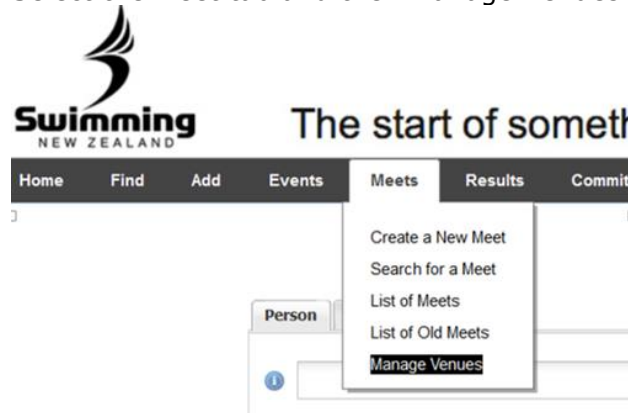
Number	Gender	Age From	Age To	Stroke	Distance	Relay	Type
1	Men	0	109	Butterfly	50 metre		
2	Women	0	109	Butterfly	50 metre		
3	Men	9	99	Backstroke	50 metre		
4	Women	9	99	Backstroke	50 metre		
5	Boys	11	11	Freestyle	50 metre		
6	Girls	11	11	Freestyle	50 metre		
7	Boys	12	12	Backstroke	50 metre		
8	Girls	12	12	Backstroke	50 metre		
9	Boys	13	13	Butterfly	50 metre		
10	Girls	13	13	Butterfly	50 metre		
11	Boys	16	16	Freestyle	50 metre		
12	Girls	16	16	Freestyle	50 metre		
13	Boys	17	18	Backstroke	50 metre		
14	Girls	17	18	Backstroke	50 metre		
15	Men	9	99	Freestyle	50 metre		
16	Women	9	99	Freestyle	50 metre		
17	Boys	11	11	Backstroke	50 metre		
18	Girls	11	11	Backstroke	50 metre		
19	Boys	12	12	Freestyle	50 metre		
20	Girls	12	12	Freestyle	50 metre		

⏪ ⏩ | Page of 5 | ⏴ ⏵ | 🔄

VENUES

How do I create a new venue?

Select the Meet tab and then Manage Venues on the top tabbing row.



Select the New Venue button.

Manage Venue

Select Venue

Venue

Complete all text fields in Venue details and select Save.

Venue Details

Name

Name

* Address

* Suburb

* City

* Postcode

Contact Details

Telephone
Fax
Email
WWW URL

Other Details

Use again
Contact Name

Security

⚠ Your current active role is National

You will receive the following confirmation screen upon completion.

The screenshot shows the Swimming New Zealand website interface. At the top left is the logo with the tagline "The start of something extraordinary". A navigation bar contains links: Home, Find, Add, Events, Meets, Results, Committees, Accreditations, Reports, System. A black button labeled "TEST" is visible. A search bar with a magnifying glass icon is on the right. Below the navigation bar, the heading "Add a new Venue" is followed by a green confirmation message: "A new Venue has been created...". Under "Venue detail", a table lists: Venue name: Test; Address: 3 test grove, upper hutt, wellington; Postcode: 5028; Ref: 000087. A "Manage Venue" button is at the bottom. The footer shows "Your role: Staff on the Staff Portal" and "© Copyright APT Solutions 2014".

COURSES

Adding an Accreditation

1. Hover over Accreditations and click on the add accreditations button

This screenshot shows the "Add Accreditation" form on the Swimming New Zealand website. The background is a large indoor swimming pool with swimmers. The website header and navigation bar are visible, with "Accreditations" highlighted in the menu. The form has tabs for "Person", "Club", "School", "Region", and "Zone". A search bar with a magnifying glass icon is present, along with "Advanced" and "Last Accessed" options. The footer includes "Your role: Staff on the Staff Portal" and "© Copyright APT Solutions 2014".

- The following screen will show up. Fill in the areas. All regional accreditations can be found in the Accreditation drop down. Once done click save and the accreditation will be recorded against their profile.

The screenshot shows the 'Add Accreditation' form in the Swimming New Zealand system. The form includes the following fields:

- * Member:** A text input field with an information icon.
- * Start date:** A date picker with the format 'dd/mm/yyyy'.
- * Accreditation:** A dropdown menu.
- * Status:** A dropdown menu.
- Charge fee:** A checkbox.
- Accreditation Fee:** A text input field.

A 'Save' button is located at the bottom left of the form. The page header includes the Swimming New Zealand logo and the tagline 'The start of something extraordinary'. A navigation menu at the top contains: Home, Find, Add, Courses, Meets, Results, Committees, Accreditations, Reports, System.

- To view the accreditation in the members profile simply click on the accreditations tab along the top of their profile

The screenshot shows a member's profile with the 'Accreditation' tab selected. The profile includes the following information:

Mailname	Membership Type	MEMBERSHIP Number	Meet Manager	Date of Birth	Age	Join date	Indicator	Approved Status
[REDACTED]	Administrator	944869	[REDACTED]	[REDACTED]	[REDACTED]	06/01/2014	Non Paying	Approved

The 'Accreditation' tab is highlighted in yellow. Below the profile information, there are three sections:

- This person:** Includes a name field with 'Mr.' and a redacted name, and buttons for 'Add to Basket', 'Personal details', and 'Add to Card run'.
- Meet Manager:** Includes the text 'Meet Manager' and an 'Edit' button.
- Status:** Includes a green message box: 'Record 944869 is currently active' and a 'Lapse' button.

GENERAL ADMINISTRATION

What do the committee roles mean?

Assigning members to committee roles not only helps Swimming New Zealand and Swimming Regions to ensure that we have the correct committee contact details for your club, but it will also provide each committee member with access to the database.

Committee members will be required to use their own individual membership username and password to access the database. The intention of this is to provide users of the system a single sign-on to access all elements of the MMS/CMS. For this reason, all committee members MUST be registered members of a club in order to be aligned to a committee role in the database.

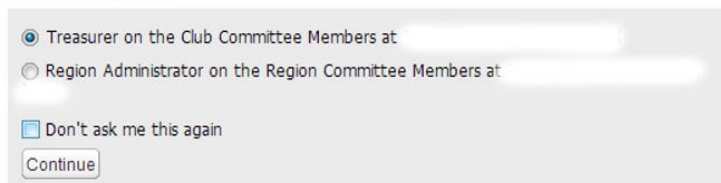
Selecting your active role

An individual with multiple roles will need to select the role they are assuming upon logging into the database.

For Example:

John Smith is a Treasurer at Example Club, John is also the President at Example Region. Upon logging into the database John will be greeted with the following message:

Select a Role

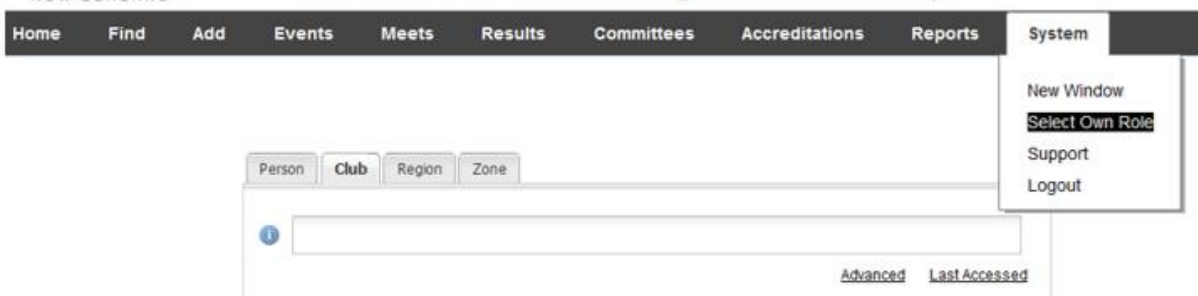


Committee members will need to select which role they wish to act as before being taken to that particular console.

Once logged in you can change your active role by selecting the System tab from the menu items and then Select Current Role. You will be presented with the same Select a Role screen as when you log in, where you can select which role you now wish to assume.



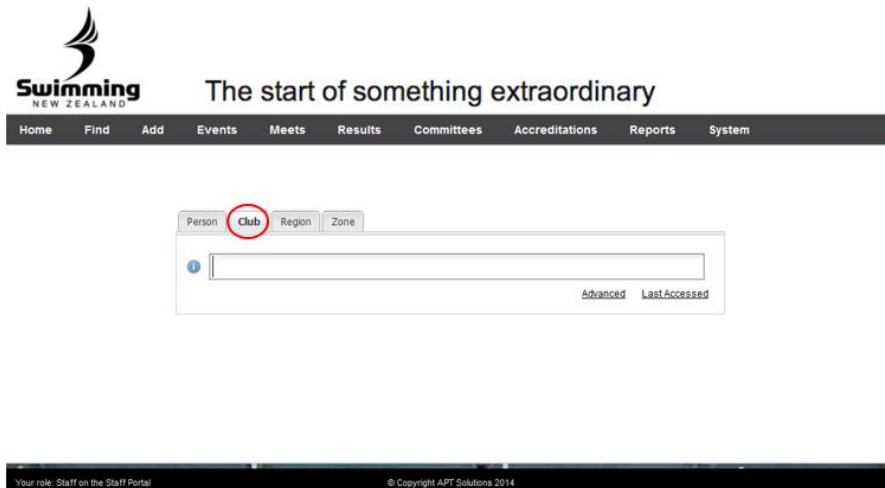
The start of something extraordinary



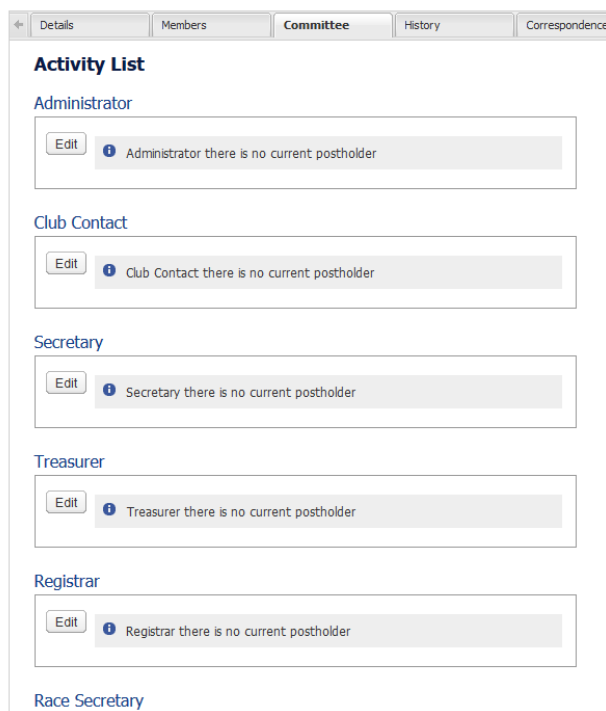
How do I update my committee details to give them access?

It is important that committee details are entered correctly as the database will only be available using an individual committee member's unique log in.

Once logged into the system using your username and password, click the club tab and access your club's profile.



Select the Committee tab. This screen will allow you to view and edit the details currently recorded in the system.



Select the Edit button and then begin typing the committee member's surname and click

the person's name that holds that position. Note: committee members must be members of your club to be aligned with a committee position.

The screenshot shows a web interface with a navigation bar containing 'Details', 'Members', 'Committee', 'History', and 'Corresponden'. The main heading is 'Administrator: add or remove postholders'. Below the heading is a descriptive paragraph: 'This screen allows you to remove current postholders and add new ones. When you click 'Next' you will be shown a confirmation screen; if you confirm the changes, they will take effect immediately and the committee will be updated.' A message box states 'There is no current Administrator'. The 'New postholders' section includes a search instruction: 'Find the new postholder by typing in the field below.' Below this is a 'Name/Number' input field with an 'Add' button. There are also 'Start Date' and 'End Date' fields, both with date pickers. The 'Start Date' is set to '20/05/2014' and the 'End Date' is a placeholder 'dd/mm/yyyy'. At the bottom are 'Cancel' and 'Next' buttons.

The selected member information will be populated in the field. If there is an existing postholder already aligned to the committee position who no longer needs to be aligned to this position, select Remove by ticking the box, then select Next.

The screenshot shows a web interface with a navigation bar containing 'Details', 'Members', 'Committee', 'Documents', and 'History'. The main heading is 'Secretary: add or remove postholders'. Below the heading is a descriptive paragraph: 'This screen allows you to remove current postholders and add new ones. When you click 'Next' you will be shown a confirmation screen; if you confirm the changes, they will take effect immediately and the committee will be updated.' The 'Current postholder to be removed' section contains a table with the following data:

Current Secretary	Number	Start Date	End Date	Remove
[Redacted]	[Redacted]	29/11/2013		<input type="checkbox"/>

Below the table is a '* End Date' field with a date picker set to '01/12/2013'. The 'New postholders' section includes a search instruction: 'Find the new postholder by typing in the field below.' Below this is a 'Name/Number' input field with an 'Add' button. There are also '* Start Date' and 'End Date' fields, both with date pickers. The '* Start Date' is set to '02/12/2013' and the 'End Date' is a placeholder 'dd/mm/yyyy'. At the bottom are 'Cancel' and 'Next' buttons.

You will receive the following confirmation screen upon completion.



Select Return and repeat this process to edit other committee members as required.

How do I edit members' usernames and passwords?

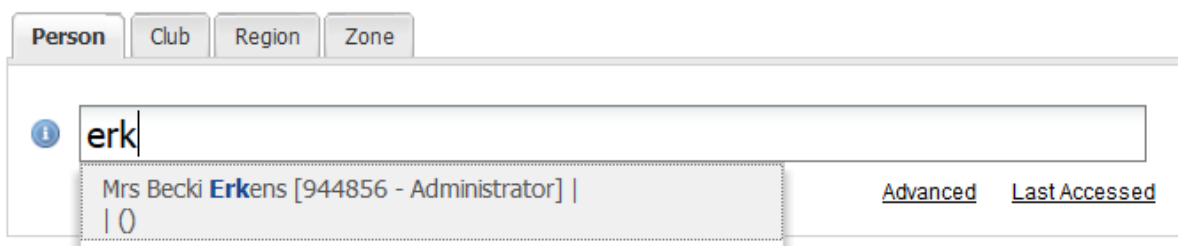
From the homepage ensure the Person tab is selected.



Here you can search for the member whose details need editing.

You can search a few different ways;

- Members name
- Member number
- Or use the Advanced tab to search more specific attributes



Once you find the member their details will appear.

Under the **Personal** tab you will see the Web Access box, click the **Edit** button

Personal Profile Events & Meets Accreditation Correspondence History Biometrics

This person
Mrs Becki Erkens (944856)
[Your settings](#) [Personal details](#)
[Remove from Card run](#) [Add to Basket](#)

Web Access
Web User Id: Becki
Password: *****
[Edit](#)

Status
Record 944856 is currently active
[Lapse](#)

Contacts
No email addresses set
[Log received email](#) [Send quick email](#)
No phone numbers set

Club
[Staff](#) [Select](#)

Secondary Club
[Select](#)

Approved Member Status
Approved
[Edit](#)

Subscriptions
Type: Staff
Pay Method: None Required

In the window that appears you can now edit the member's Username and/or Password by typing in the relevant fields and clicking 'Set Web access details' to save changes.

Web access: Mrs Becki Erkens (944856)

i If you wish to retain the current Username shown below, copy it into the 'Confirm Username' field. To set a new Username, enter that in both fields.

Username:
Confirm Username:

i To set a new Password, enter it in both fields (leave blank to retain the user's current password)

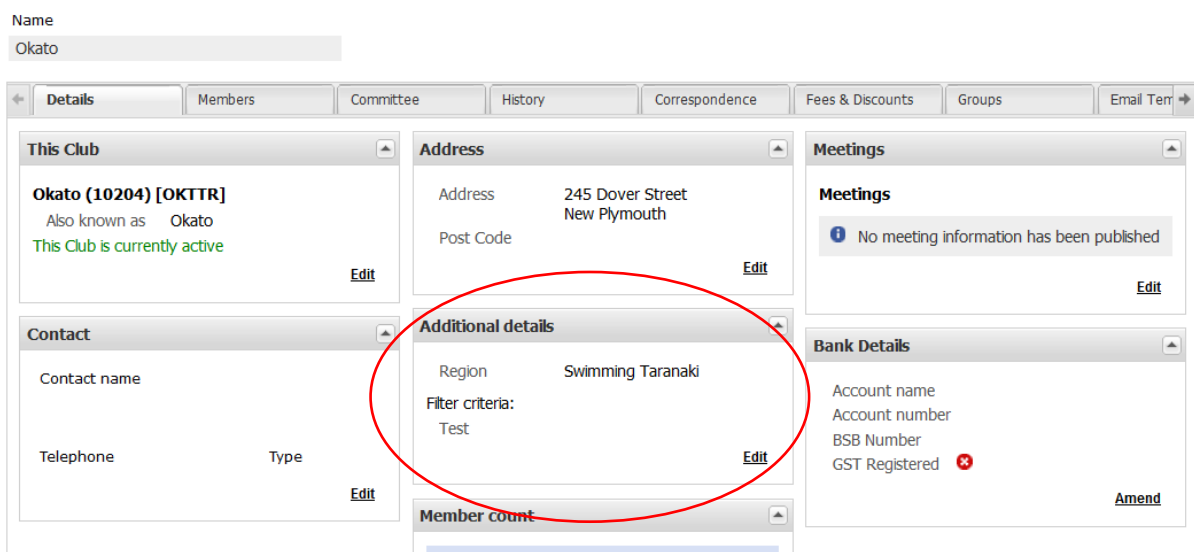
Password:
Confirm Password:

How do I check if I am aligned to the correct region?

Click the Club tab and begin typing the name of your club. Select your club from the drop down list.



On the **Details** tab you can view which region/area you are currently aligned to by looking in the **Additional details** box found in the centre of the screen under the Address section.



Name
Okato

← Details Members Committee History Correspondence Fees & Discounts Groups Email Term →

This Club
Okato (10204) [OKTTR]
Also known as Okato
This Club is currently active
[Edit](#)

Address
Address 245 Dover Street
New Plymouth
Post Code
[Edit](#)

Meetings
Meetings
No meeting information has been published
[Edit](#)

Contact
Contact name
Telephone Type
[Edit](#)

Additional details
Region Swimming Taranaki
Filter criteria:
Test
[Edit](#)

Bank Details
Account name
Account number
BSB Number
GST Registered ✘
[Amend](#)

Member count

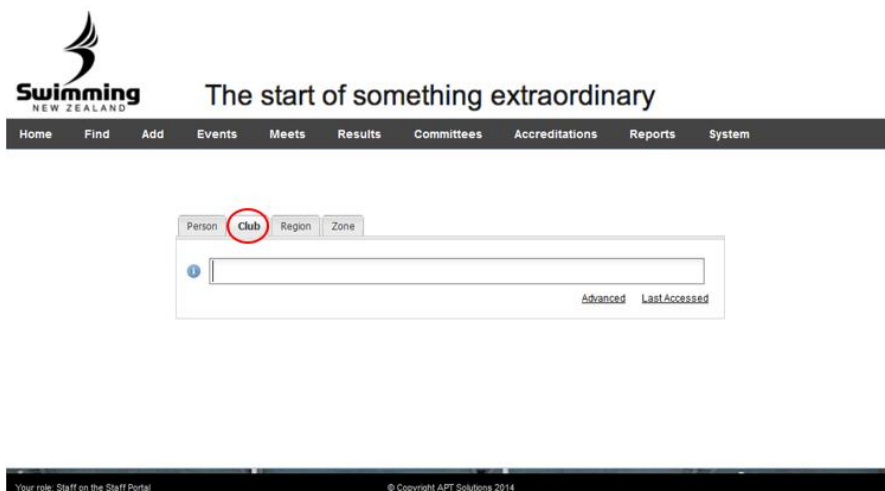
If you are not in the correct Region, please contact your Regional Administrator for this to be updated.

FINANCE

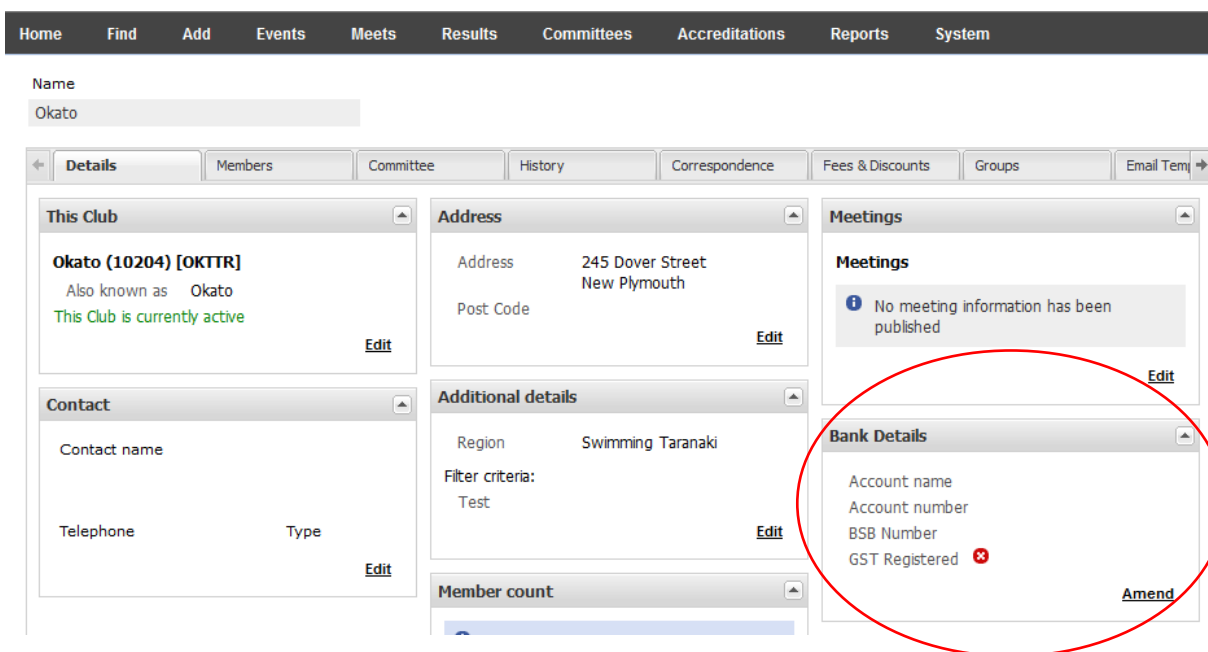
How do I set up my banking details and GST preference?

It is important that clubs enter their club's bank details, in order for all fees from online memberships to be directly deposited into the club's bank account. Entering the club details is a two-part process, where one committee member must enter the bank details, and another must verify and accept these details as correct.

Click on the club tab and access your club's profile.



On the Details tab you can view the current banking details recorded for your club in the right-hand column. If the Bank Details fields are blank no details have been added. To edit these details, or to set up details for the first time, click 'Amend'.



The next screen will allow you to fill out or amend the details as recorded, as well as advising if your club is GST registered.

The screenshot shows a web application interface. At the top is a dark navigation bar with links: Home, Find, Add, Events, Meets, Results, and Committee. Below this, the club name 'Okato' is displayed. A secondary navigation bar contains tabs: Details (selected), Members, Committee, and History. The main content area is divided into two sections: 'Current Banking Details' and 'New Banking Details'. The 'Current Banking Details' section lists: Account name, Account number, BSB Number, and GST Registered (with a red 'x' icon). The 'New Banking Details' section contains four fields: '* Account Name' (with a red border and warning icon), '* Account Number', '* BSB Number', and '* GST Registered' (a dropdown menu). At the bottom are 'Cancel' and 'Save' buttons.

Click 'Save' once completed and the system will take you back to your club's profile page. When modifying the original bank details supplied, a second committee member will be required to verify and approve these bank account details.

To verify the account details, the second committee member must log in with their individual log in details, following the same above steps and select Approve on the Bank Details screen if correct. If these details are incorrect the committee member must click the Reject button and follow the above steps to complete the correct details.

How do I approve my club banking details and GST preference?

It is important that your club banking details and GST Preference is set up correctly in order for funds from any online transactions are correctly distributed to your club. This is a two-part process.

1. Club banking details and GST Preference must be set up first.
2. A second committee member must log in (using their individual log in) and verify that the banking details and GST preference are correct.

If you are seeing the below image, follow these steps to verify and approve the banking details for your club.

Bank Details

⚠ Unapproved Bank details

Account name
Account number
BSB Number
GST Registered

Click the Club tab and begin typing the name of your club. Select your club from the drop down list.

Person **Club** Region Zone

ok

[10204] Okato
Swimming Taranaki | Star rating
Club

Advanced Last Accessed

Select Amend under the Bank Details section.

Home Find Add Events Meets Results Committees Accreditations Reports System

Name
Okato

Details Members Committee History Correspondence Fees & Discounts Groups Email Temp

This Club
Okato (10204) [OKTTR]
Also known as Okato
This Club is currently active
[Edit](#)

Address
Address 245 Dover Street
New Plymouth
Post Code
[Edit](#)

Meetings
Meetings
No meeting information has been published
[Edit](#)

Contact
Contact name
Telephone Type
[Edit](#)

Additional details
Region Swimming Taranaki
Filter criteria:
Test
[Edit](#)

Member count

Bank Details
Account name
Account number
BSB Number
GST Registered ⚠
[Amend](#)

Review the bank details and ensure they are correct, then Approve.

GST Registered
Requested By
Requested on 28/11/2013

Cancel **Approve** Reject

Your clubs bank details will now show on the Details.



A screenshot of a web form titled "Bank Details". The form contains four input fields: "Account name" with a masked value, "Account number" with a masked value, "BSB Number" with a masked value, and "GST Registered" with a masked value. An "Amend" button is located at the bottom right of the form.

How can I offer family memberships?

In order for your members to be able to pay for multiple members in one single transaction (i.e. a family membership), the following **MUST** be set up:

1. All members of a family are linked together
2. Create club-specific single membership types (if applicable)
3. Setup Club membership fees into the database

The database will pick up on what each linked family member's member type is when processing the transaction. The total transaction charge for linked members will be the total sum of applicable membership fees (Swimming New Zealand, Swimming Region and your club fees).

An added benefit to linking members within their family is that clubs now have the ability to offer discounts on their club fee for families, through the form of Discount Packages. These packages will automatically display a discounted amount that a family of a specific combination will pay when their family's *primary member* logs in to renew.