



SWIM ON-LINE HELP FILE MEMBER PORTAL INSTRUCTIONS

The Clubs Online “front end” that Members are currently joining online through the States is via a MEMBERS PORTAL at the State level. Clubs now have the facility to have their own portal, which will only show the Club’s SUBSCRIPTION TYPES, and can be Club branded. Portals can be used in conjunction with the Clubs Online website offering, or can be used as a stand alone, linked to an existing website. This help file is designed to explain how to set the portal up and give the address for linking it onto your Club’s website.

Information on how to add headers and design changes to the portal are available in the Help File-How to add Design Images to Website.

1. WHERE DO I START?

To set up the portal go to the management console (red screen) and the menu MEMBERS / MEMBER PORTAL. Click the red EDIT button.

Title:

Complete the title. This might be “Welcome to the XXX Swimming Club Membership Area”, or, like the states, you could use the term “Member Portal”.

Summary:

Enter text into the summary area. This text can be copied and pasted from word. (To prevent formatting changes when you paste into the editing box, when the warning “The text you want to paste seems to be copied... etc” appears, click the CANCEL button. The text pastes directly in.

Refer to the Website Manual – Section 2 for more information on adding pictures, text and hyperlinks into the editing box here.

Main Menu or Top Menu options

Note that for each menu option in the portal, administrators can elect for the menu to appear either in the Main Menu or the Top Menu. If MAIN MENU is selected, the menu will appear either in the left column of the portal, if menu location in WEBSITE / DESIGN OPTIONS / LAYOUT is set to Vertical, or along the horizontal plane, underneath the header if the layout option is set to Horizontal. Or if TOP MENU is selected, the menu will appear on the top right hand side of the portal, above the header. The TOP MENU option is not regularly used as it can sometimes be difficult for members to see menus appearing in this area.

Home Page:

(Do you wish to have a home page button on your members portal?)

This option allows administrators to easily link back to the club’s website. Select the appropriate option of where the link will appear on the portal from the drop down:

Yes – (Main Menu) - If this option is selected, the link will appear with the other menu’s of the member portal (ie. Log in, New Members etc), and will appear automatically as the first option in the list.



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Yes – (Top Menu) - If this option is selected, the link will appear in the top right of the screen, above the header

No – If this option is selected, this standard feature will not be used by the Club and therefore the Home Page Title and Home Page URL is not required.

Home Page Title: This defines what the menu will say.

Home Page URL: What is the URL of the Club's website. (enter as www.etcetc..)

Members Section Title:

This title is seen when the member logs in, and is the option for members to update their personal details. Generally, organisations use "Update Details".

Register & Renewal:

(Do you wish to allow online membership registration?)

Select from the drop down the appropriate functions you want your members to be able to have access to through the portal.

Register & Renewal – Members can register as new members (New Registration menu), and renew (when the member logs the Renew Registration menu appears and members can renew their membership).

Register Only – Only new members can register, existing members (who log in with a username and password) can not renew online.

Renew Only – the New Registration menu does not appear on the portal – only members that log in can pay online.

No – Clubs would select NO if it was toward the end of the season and they wanted to prevent members registering or renewing online.

Members Update:

(Allow members to update profiles)

If No is selected from the drop down, the log in button is removed from the portal, and members cant log in; they therefore are unable to renew their membership online.

Password Retrieval:

(Do you wish to allow members to retrieve their username and password?)

Turning this feature on allows members to automatically retrieve their username and password. The member enters their email address into the box, the system then searches the database for email address(es) that correspond to members in the database, and send the username(s) and password(s) to the email address entered. Therefore, for families, they will receive an email with the usernames and passwords for all the relevant members attached to that email address.



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Contact Us:

(Include online email based contact form?)

If this feature is turned on, the email form is sent to the email saved in the management console under the menu ADMINISTRATION / DETAILS.

Most organisations set this menu to appear in the TOP MENU to keep the main menus clear for member processing.

Narrative Entry Box Title:

When members register new or renews through the portal, when looking at the list of SUBSCRIPTION TYPES, at the bottom of the screen is a comment box. By default the title of the box is "(Maximum 500 Characters):", however editing the title here allows you to define the title of the box.

Manual Registration Option:

If this option is set to YES, when the member completes their personal details page, they have the option to pay online or submit their application but not pay online (the system creates an unpaid transaction, and if they are a new member, they will be added to the MEMBER LISTING with a member status of ONLINE and financial status of UNFINANCIAL; the member would pay by cash or cheque), or submit their application and pay online. Clubs that wish to encourage members to pay online are likely to turn the option to NO, as this takes the member directly to the secure credit card payment page.

Please note if your organisation is NOT absorbing the administration fee (in the menu SUBSCRIPTIONS / OPTIONS) the member will receive an invoice to the value of the transaction *plus* the 6% administration fee. To reduce confusion for members it may be worth considering removing the manual option so that only members that go online can pay online, or noting what the cost if paid by cash or cheque is in the SUBSCRIPTIONS / SUBSCRIPTIONS TYPES – Invoice Narrative.

Welcome:

The welcome message displays when the member has logged in. If the Club does not enter any information into this box, the system by default will display: "Welcome to your secure online member account. To change your contact details, username or password, click on [Tile of Members Section]." Modifying the welcome message allows the Club to customise their message to their members.

After completing the set up of the portal, click the red UPDATE button to save the changes.

Pay Subscriptions (this is not in the MEMBER / MEMBER PORTAL menu, but can appear in the "front end" portal by following these instructions.

If you want your members to be able to see their paid transactions, or pay unpaid invoices you will need to turn on the SUBPAY menu. This is found in the WEBSITE / SUBPAY menu. The other features in the SUBPAY menu do not apply in the portal, so it just needs to be turned on to display the "Pay Subscriptions" menu in the MEMBER PORTAL.



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2. HOW DO I VIEW THE PORTAL, AND WHAT LINK DO I PUT ON MY WEBSITE?

In the menu MEMBERS / MEMBER PORTAL, at the top of the screen are a red EDIT button, and red PORTAL button. Clicking on the PORTAL button opens the portal.

The address in the menu of your internet browser is what is to be used to link on your Club's website.

3. FREQUENTLY ASKED QUESTIONS

The portal doesn't match the colours of my site how do I change it?

We have produced a document that is on the noticeboard which provides instructions on how to turn your portal into a black and white version. The same logic can be applied for another colour as long as you have the six digit colour code (known as the *hexadecimal colour code*) for that colour.

There is also a help file in the noticeboard on how to load headers and a zip file of images that can be used as a header and menu images.

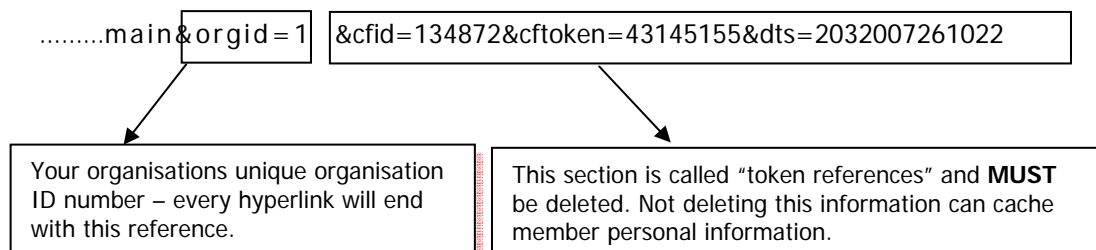
Although this is a simple process, it may be confusing for those not comfortable with computers and it may be advisable to put the standard state portal header into the DESIGN OPTIONS / IMAGES for your Club's portal.

How do I get images into the portal?

Refer to the Website Manual, IMAGES and the RANDOM IMAGES feature. Random images can be set to appear in the Member Portal only.

An image appearing in an editing box can be hyperlinked – refer to the Website Manual Section 2. Please note that token references **MUST** be removed from the link. If this is not done, member's personal information can cache causing problems for transactions and members.

EVERY hyperlink, if linking into a Clubs Online page **MUST** end in the organisation's organisation ID (the ID can be found by going to the ADMINISTRATION / DETAILS view menu.





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Can I put another menu in the portal?

Yes, use the website: WEBSITE / USER DEFINED DATA / CATEGORY, and in location choose MEMBER PORTAL ONLY. For more information about adding the menus, refer to the Website Manual – Section 13.

How do I put a link back to the front page of the portal?

Add a WEBSITE / USER DEFINED DATA / CATEGORY, and define the category type to be MENU OPTION, then set it to appear in the MEMBER PORTAL ONLY. Put the portal address in the URL Field and bring the status online.