

Managing Members

ClubNet is an online membership database, where members register and pay levies in one simple transaction via a clubs online portal, alternatively administrators can add members manually. Although the online portal initially takes time to set up, it significantly reduces administration workload for club administrators. At the start of each year, you must ensure the subscription types are correctly set up before members are added. For more information, see the [New Season Set Up](#) document.

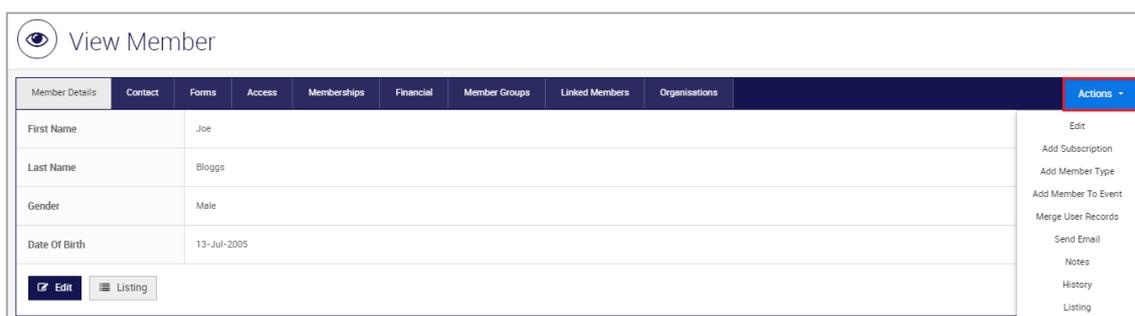
For more information about setting up and using ClubNet's online portal, please read the [Online Registrations](#) document.

Member Record

Go to **Membership > Members** for a list of members in your club. From here you can view and edit member's information by clicking the white Actions button next to their record.

From the member record, you can

- Edit their details- passwords are now encrypted
- Add a Subscription and Member Type
- Send them an email
- View their historical or current subscription information and pay any unpaid transactions.
- Link their record to another member (such as a family member)



View Member		Actions
Member Details	Contact	Forms
Access	Memberships	Financial
Member Groups	Linked Members	Organisations
First Name	Joe	<ul style="list-style-type: none"> Edit Add Subscription Add Member Type Add Member To Event Merge User Records Send Email Notes History Listing
Last Name	Bloggs	
Gender	Male	
Date Of Birth	13-Jul-2005	
<input type="button" value="Edit"/> <input type="button" value="Listing"/>		

Member Type: Set by Athletics NZ so that our whole membership can be reported on consistently, we request that you do not add new or edit those set by Athletics NZ.

Subscription type: The payment category that applies to the member- these can be adapted by the club, but must be based on those provided by Athletics NZ at the start of each season.

Member Status

Members have different statuses applied to their record depending on their activity within the club. As the club administrator you can change this at any point to ensure it accurately reflects their status with the club. The definition of each member status is as follows:

Active- Any member actively involved in your club.

In active- Any member who is no longer active in your club. Generally if they have not been financial for 2+ years. This status can be useful to filter out these members from communications.

Online- Any new member who has recently signed up or renewed using your online portal. This can be used to check member's information is correct or ensure they have collected their welcome pack before making them active.

Trans In- This member has recently been granted a request to transfer into your club from another club.

To change a member's status, go to [Memberships > Members](#) and click the in the status column, mark as either active or inactive as described above.

Merging Records

If you have multiple records for one person, you will need to merge these to keep your database clean and concise. You will be merging the old record into the correct (target) record, this will keep the target information, so you may have to take note of the members correct contact information to ensure their record is correct once you have merged the two accounts.

To merge the records, you will need to:

1. Note the email address and date of birth of the correct record (or the one with the smaller Athletics NZ Membership number if unsure).
2. Go into the old record (larger number Athletics NZ number) and click [Actions > Merge User Records](#).
3. Enter the Target Email Address, Name and Date of Birth of the correct record.
4. It may take a moment to merge the records.
5. You may need to update the record with the correct contact information including email address.

Updating Email Address

Email address is the field that links members to one another and ensures we minimise duplications in the database, meaning updating them can be tricky.

If you get the message "Email already exists" when you save the new address, you will need to either

1. Merge the records if they have a duplicate record. Click [Action > Merge User Records](#).
2. Link the member's records together, if someone else is using that email address. Click [Action > Link to primary member](#).

Either way you will need to know the name and date of birth of the primary record holder using that email address. You may need to contact support@sportstg.com to locate the record as it could be an event entry.

If you can't enter anything in the email field- the member is not the primary account holder for that email address. Look at the "Linked" tab to find the primary member. If there is not a linked tab, then the primary member may sit outside our community (e.g with another sport) or may be an event entrant. You will need to contact Support@sportstg.com to find and merge the records together or change the email address.

Still can't update the email address, contact Support@sportstg.com, inform them which club you are from, what you are trying to do and provide the correct and incorrect email address. They can also change the primary member of a family of linked members.

Transfers

An athlete can be a member of more than one club, but they can only be a competitive member of one club at any one time. They can change their competitive status to another club once a year by requesting a transfer.

Second Club- Social Member

Should an athlete join a second club as a social member only, then they can do so by using the Second Club Social Member subscription. You will not need to transfer these members but will need to verify they are financial at another club via a network search (Membership > Transfers > Network Search).



The screenshot shows a 'Network Search' form with the following fields: First Name (Joe), Last Name (Bloggs), and Organisation. Below the form is a 'Search' button. Below the search form is a table with the following data:

User ID	Last Name	First Name	Gender	Organisation	Financial Status	Status	
	Bloggs	Joe	M	Athletics New Zealand	No	Active	Transfer Request

Their subscription status will be "Pending paid", this needs to be approved by the club registrar (In the Financial > Subscriptions list, click the white actions button > Approve) when you confirm they are a financial competitive member at another club.

Please note- if a member is found to have incorrectly purchased this subscription, Athletics NZ will require the club to process the correct membership.

Winter to Summer Transfers

Due to the financial status of the athlete not being brought across in the transfer. This year a transfer of membership from a winter to summer club is not required. The member can purchase a "Winter to Summer Transfer" subscription with the summer club. You **must** check that the member is financial in their winter club first. The athlete's winter club will need to be noted in their registration.

Transfers- If a member is transferring their competitive status to the new club, a transfer request will need to be processed.

1. Network Search for member ([Membership > Transfers > Network Search](#))
2. Request transfer- click “Transfer Request” in the Network Search results
3. Transfer approved by original club- member will have “Trans In” membership status
4. Activate member status and process new subscription.

Regularly check for any pending transfer requests- [Membership > Transfers > Transfer List](#)

Notifications- You can set email notifications for transfers by clicking on [Administration > Member Options > Transfer Notifications](#). This sends to the email address listed in [Administration > Organisation Details](#).

All members must be approved except if the member is in financial debt to your club, you will need to explain this to both the member and new club.

Online Registrations:

The information below outlines the steps required to manage members in your ClubNet portal.

1. Transfer member record from old club

If applicable, please follow the Transfers section above.

2. Member registers and pays online

For those paying by credit or debit card, this is done by the member. Any new registrations will have an ‘Online’ status assigned to their member record which must be promoted to ‘Active’ once the member has been approved by the club administrator. If a member chooses to submit their details only, they have opted to manually pay their registration fees at a later date, when this occurs you will have to manually process the transaction as outlined in the ‘Paying an unpaid transaction’ section below.

Please Note: A subscription can be viewed in the member’s record and [Membership > Financial > Subscriptions](#).

3. Check settlement reports each week

Transactions taken by credit or debit card will be paid directly into the club, centre and Athletics NZ’s bank accounts, monitor this by checking your settlement statements – [Membership > Financial > Settlements](#). The Actions button allows to you view or export the settlement and refund statements.

4. Pay any manual levies- by 20th of each month

By 20th of each month, you will need to make any payments owing from the previous month to the centre and Athletics NZ- this is only applicable for members choosing to ‘Submit only’ and manually paying levies. For a detailed explanation please read [Finance](#) document.

Manual Registrations

The information below outlines the steps required to manually manage members in your ClubNet console. If your subscription types are set to online payment mandatory, you will need to turn that setting off before processing any manual registrations.

1. Network Search for member record

Check your members list to see if the email address is associated with another members record and go to [Membership > Transfer > Network Search](#) to check if the member exists elsewhere in the community.

To transfer a record, please follow the steps in the Transfers section above. This step only applies if a member is transferring mid-season from one club to another.

2. Update / Add Member Record

Go to [Membership > Members](#), if the member is new to the club, click [Actions > Add](#). Alternatively search for the existing athlete, then next to their record, click [Actions > Edit](#). Enter or update all relevant member details and click Save!

If the email address already exists in the clubs console, you need to be careful not to overwrite the existing record when adding a new member, as it may be of another family member. If the email address is recognised as already existing in the community, you should see the message below:

Add Member

Save Subscription & Member Type

The Member has been located.
The Member is Already Attached To Your Organisation.

Active members 6 years and under
Member Type

Membership enables an athlete to take part in Athletics New Zealand, Centre or Club activities or any event requiring registration. All member athletes must be registered through an Athletics New Zealand affiliated club. Born in 2010 or later.

Save Subscription & Member Type Add Linked Member

“The member has been located”- you should have already established through your member search that this is not be the person you are adding, it is therefore someone with the same email address.

Select **“Add Linked Member”** to add the new family member to the existing record. This should take you to a blank member record which you can edit.

Please note: If you select “Save Subscription and Member Type” it will overwrite the existing record.

3. Check for unpaid transactions

From the member record, select the financial tab, here you will see a list of current subscriptions, check for an unpaid subscription. Pay the original subscription (if correct) rather than generating a new one. Click [Actions > Pay](#) next to the corresponding subscription as shown in the red box below.

View Member

Member Details Contact Forms Access Memberships Financial Member Groups Linked Members Organisations Actions

Subscriptions

Show 25 ALL A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9 Enter Search Term Name Q

Generation Date	Detail	My Split	Total	Effective Date	End Date	Transaction Date	Status	Actions
17-Aug-2016	ANZ 7-14	\$20.00	\$20.00	17-Aug-2016	31-Mar-2017	17-Aug-2016	Paid	Actions
17-Aug-2016	ANZ 7-14	\$20.00	\$20.00	17-Aug-2016	31-Mar-2017	17-Aug-2016	Unpaid	Actions
20-Jul-2016	ANZ 7-14	\$20.00	\$20.00	20-Jul-2016	31-Mar-2017	17-Aug-2016	Unpaid	Actions

Showing 1 to 3 of 3

The green box above highlights when this step has been missed, and a duplicate unpaid subscription has been generated. This results in confusion especially when using online registrations as the member will be prompted to pay the outstanding transaction when they next sign in. If both subscriptions are paid, one will then need refunding from Athletics NZ, your centre and the club, which takes time and can get complex.

4. Add Member Type

You then need to tell ClubNet what the member's Athletics NZ Member type is. Go to Membership > Members to find their record, click Actions > Add Member Type from here move the correct member type from the Available box (left) to the Selected box (right) using the arrow, as shown below.

Add Member Type

Available Selected

Active Member 7 to 14 years
Active members 6 years and under
Competitive Member 15 to 19 years
Competitive Member 20 years & over
Social Member 15 years & Over
Volunteer
Active Member 7 to 14 years
Active Members 6 years & under
Coach
Competitive Member 15 to 19 years
Competitive Member 20 years & over
Official
Social Member 15 years & over

Save Cancel

5. Add Subscription

A subscription is the payment category of the member's record. Go to Membership > Members to find their record (if not already in it), click Actions > Add Subscription Type

- Select the correct subscription
- Choose the payment method
 - Skip- this creates an unpaid transaction which can be paid at a later date.
 - Complementary- for a \$0 subscription e.g. Volunteer.
 - Credit or Debit card, cash, cheque
- Process the payment

Do not pay a subscription before payment received from member

5. Payment of Levies

Before the 20th of each month search for payments owing to your centre and Athletics NZ from the previous month. For a detailed explanation please read the [Finance](#) document.

Remember if you use online registrations, members register themselves and pay through the online portal this payment is automatically processed, saving you a lot of time.

Paying an Unpaid Subscription

If the member chooses to 'Submit only' when registering online or doesn't pay you when you originally generate the subscription, you will have to manually process the payment at a later date.

You can view a list of all unpaid subscriptions by going to [Membership > Financial > Subscriptions](#), click filter  by status "Unpaid".

When the member pays the club their fees, you can promote their subscription to paid.

1. Go to the member's record ([Membership > Members](#), then search for athlete).
2. Click on the 'Financial' tab and find the unpaid subscription.
3. Select [Actions > Pay](#) next to the corresponding unpaid subscription.
 - a. Select payment method (Cash, Cheque etc) and a reference (your name)
 - b. Click Process Payment
 - c. The payment confirmation will now appear on screen

Upgrading a membership

Should a member wish to upgrade their membership from a social to competitive, they may purchase the relevant upgrade membership. These subscription types will total the difference between the social and competitive membership rates and are available at Athletics NZ level. They will be made available to each club on request.

Cancelling Subscriptions

At the start of each season, it is important to cancel any historic unpaid subscriptions, the member will be prompted to pay this old transaction when they log on, leaving them confused and often a refund needing to be processed.

Subscriptions are occasionally cancelled and refunded for injury, illness or other circumstances so long as they align with the clubs constitution and the [Athletics NZ refund policy](#).

Cancelling an unpaid subscription

This does not require a refund as the member has not yet paid their fees.

1. Go to the members record and select [Actions > View](#)
2. Select the Financial Tab, you should now see a list of subscriptions the member has generated.
3. Select [Actions > Cancel](#) next to the corresponding unpaid subscription
 - a. Add commentary and cancel without refund

Cancelling a Paid Transaction

Should a paid subscription require cancelling, you must notify Athletics NZ and your region as soon as possible so we can make the arrangements for a refund in accordance with the [Athletics NZ refund policy](#). As the total amount paid by the member is refunded from the Club's account, it is important that the club

communicates with Athletics New Zealand prior to a refund being processed as they may only qualify for a partial refund.

1. Notify Athletics NZ and your centre of the cancellation or refund request, a response will be communicated within 10 days of your notice.
2. Once approved, you may go to the members records and select **Actions > View**
 - a. Click **Actions > Cancel** next to the corresponding paid subscription
 - b. Fill out the cancellation form
 - i. Enter the Amount, this will be the total subscription minus any administration fees as outlined by Athletics NZ refund policy.
 - ii. Add any commentary
 - iii. Cancel with refund or without refund accordingly

Please Note: The monthly levy payment notification sent out is derived from the Payments report, therefore won't factor in any refunds owing, for now each refund needs to be arranged directly with Athletics NZ and your centre.

You can view any manual transaction refunds by going to **Membership > Financial > Refunds**

You can view any credit card refunds by going to **Membership > Settlements > Actions > View refunds**

Support and Further Information

A variety of support is available to help club administrators manage your members so please make sure to use it if you are having trouble or if you have any questions.

1. **Best Practice Guides:** There are best practice guides available on the ClubNet noticeboard on our website- go to <http://www.athletics.org.nz/Clubs/ClubNet>
2. **SportsTG Help Button:** Use the help button at the bottom of the page to access a list of resources or frequently asked question. When doing this ensure you are looking at documents relating to the OneSport version of ClubNet.
General Help: <http://help.sportstg.com/help>
Members section: <http://help.sportstg.com/help/members-ebf08d2>
3. **Centre Super Users:** A list of centre Super Users is available on the ClubNet homepage noticeboard or by following the link below:
<http://www.athletics.org.nz/Portals/24/Files/ClubNet/SUG%20list.pdf>
4. **Athletics New Zealand:** Contact the Membership and Club Coordinator. Follow the link to the Athletics NZ contact us page: <http://www.athletics.org.nz/About-Us/Contact-Us>
5. **Workshops and Webinars:** The Athletics NZ Membership and Club Coordinator will run a series of workshops and webinars (interactive online workshops) throughout the season to support both winter and summer clubs. Look out for these advertised on the ClubNet noticeboard on our website, in ClubChat and other email notices during the year.