How to Set Up and Manage SHOP and PRODUCTS

This guide has been designed to assist you in the process for setting up your Shop and managing Products.

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Support: If you have any questions or if you require assistance, please contact membership@crnz.org

SHOP

Clubs can add products to sell via the Shop. Clubs can decide if they want to restrict items to be viewed only by members or to have anyone be able to purchase items.

The shop is a unified shop so all items will be viewable on the CRNZ Club Membership & Paddler Portal including CRNZ and other club products. Your club products will show up to your members first if they are logged into their accounts.

ITEM SET-UP

To create an item for sale, you will first need to create the Item and then you will create the Item Price. If you are familiar with Event Management functionality, this is very similar to creating an Event and then creating the Event Tickets.

Within one item, you can create multiple Item Price records. For example, the Item might be a Club T-shirt, and each Item Price might be the available sizes. The quantity available can be set for each Item Price record, allowing you to manage the inventory for your items. Rules can be used to restrict who can purchase a specific Item Price record, or to offer a discount or apply a surcharge to an Item Price record. A detailed guide on Restrictions, Discounts and Surcharges can be accessed here.

To create a new Item, locate the Shop Management tile under the My Club heading. To create an item, select the Add New Item button towards the top left of the screen.

NAME AND CATEGORY
Enter the Item Name of the item you wish to sell. Make it descriptive enough to capture the attention of the buyer, but keep in mind that there is an Item Detail text box where all the necessary information can be featured. Select the Category of the item to help buyers search for items of interest. No Sub-categories apply.

TIME AND DATE
Select your local time zone and set the Ordering Start Date and End Date. Setting a start date is useful for in-demand items where you wish to advertise the sale time. If your items are ready for sale, enter today's date as the start date. An end date is particularly relevant where items are available for pre-order, where a club wishes to take orders before ordering merchandise. Both fields are mandatory so if you do not require an order end date, enter a date far into the future, such as 31/12/2099.

After entering an end date, you will be asked if you wish to apply these dates to your item availability dates. This will duplicate the ordering end date on each of the Item Price records you create, however you will still have the opportunity to change these dates in each Item Price record.
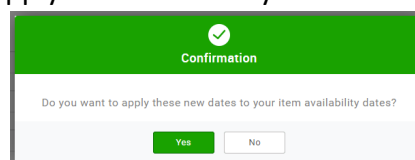
ITEM IMAGE AND DETAILS

Use the small camera icon to launch the Upload Image pop-up and select an image of the item for sale from your device. It you do not select an image, a default image will appear (the colourful craft featured at the top of the Shop browser).
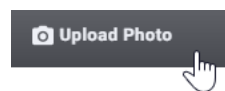
The Item Details text box gives you the opportunity to provide the buyer with all of the information they need about the item you wish to sell. Make use of the formatting options to create something exciting.

ITEM CONTACTS

This field is optional. If you want to provide your buyer with a point of contact in case they need more information about the item, search for that contact's record in the platform by selecting the Add Contacts button.

ITEM PRICE

To create a new Item Price record, which is your purchasable item, select the Add New Item Price button.
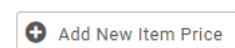
Enter the name of the item, the price of the item and the quantity available for sale, then click the green tick.

After clicking the green tick, a new Item Price record will appear. Select the cog to configure the Item Price record. This will launch the Edit Item window.

In the Edit Item window, you can further modify the Item Price record. Add a description to this specific item, configure the way the price is displayed, change the sale dates for only this record, or configure the way that users can purchase the item. For example, setting Max Order Qty to 1 will limit the users to only purchasing one of these items. Ticking the Prevent Multiple Order box will stop them from returning to purchase it again.

If your club is registered for GST, you must select to charge tax on this item in this screen.

Under the heading of Item Restrictions, Discounts & Surcharges, rules can be applied to restrict the ability to purchase or to modify the final price based on factors such as age, membership type, credentials and profile fields manageable by the club. For more information, please refer to the Restrictions, Discounts and Surcharges Administrator Guide.
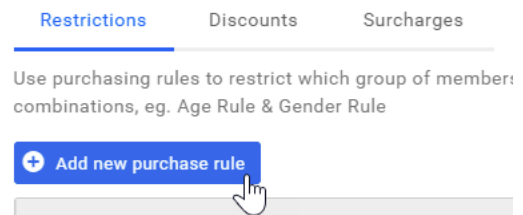
If you need to capture information from the purchaser via custom fields, this can be done via the Event Overview section of Field Management, with plans to launch a specific Shop Overview section within Field Management in a future release. For more information about Field Management Administrator Guide.
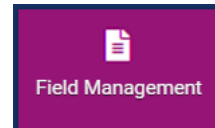
Once all relevant sections of the Edit Item screen have been completed, select Done to save your changes.

If you have created multiple Item Price records, use the arrows to the right of each Item Price record to re-order the items as required.
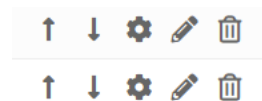
ITEM SETTINGS

If the Ordering Start Date for the item is in the future, you can select Notify Me so that interested buyers can be notified when the item becomes available for purchase. To enable this feature, the associated email must be configured in Email Management. For assistance, please contact membership@crnz.org

To allow interested buyers to join a waitlist should the available stock sell out, tick the box next to Waitlist. Manage users on the waitlist via the Items Overview screen, accessed from the Shop Management tile. Next to the item which has a waitlist, select the downward arrow from the options to the right and select View Waitlist.
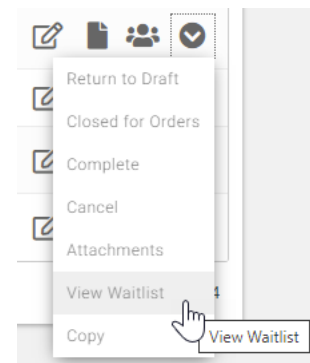
Some items may only be available or relevant to a select group of users. To prevent the item appearing in the Shop browser, set the Listing Privacy to Private. A private item is only accessible by direct link.

ADVERTISED PRICE SETTINGS

There are three options to choose from when selectin the display price settings:

In most cases, the first option will be suitable, however if rules have been created to apply discounts and/or surcharges, you may wish to create a User Defined Range which is indicative of final prices after those rules have been applied.

Once all sections of the item have been configured, select from the options at the bottom of the screen to Preview the item, Save as Draft if incomplete, or Save and Publish if ready for sale.
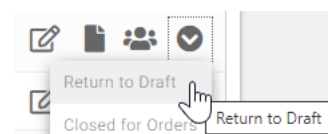
| Cancel | Save as Template | Save as Draft | Preview | Save and Publish |
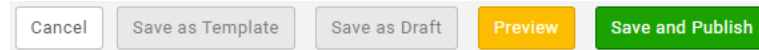
After selecting Save and Publish, select Continue Editing to return to the editing screen where you can retrieve the direct link for the item.

ITEMS OVERVIEW

ADDING NEW ITEM RECORDS

If, after creating an Item, you need to add an additional Item Price record (for example, an existing item becomes available in a new colour), the item must be first returned to 'Draft' before a new Item Price record can be created. To return the item to draft, navigate to Items Overview by selecting the Shop Management tile. Next to the item you wish to edit, select the downward arrow, and then 'Return to Draft' from the menu options. Once complete, return to Items Overview, select the downward arrow again and select 'Publish' to return the item to sale.

COPY ITEM

If a new item is similar to an existing item available for sale, you may wish to Copy an existing item rather than starting a new one from scratch. To copy an existing item, navigate to the menu options to the right of the item you wish to copy. Select the downward arrow and then Copy.
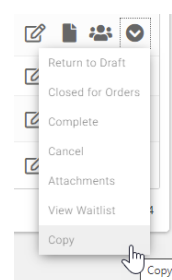
It is important that all fields are reviewed for relevance, ensuring that the title (Noting that the title of the copied item will be prefixed with "Copy of"), price, availability and other key inputs are updated accordingly.

MANAGE ORDERS

VIEWING ORDERS

To see orders for an item, navigate to the menu options to the right of the item and select the Manage Orders icon. Each item sold appears as a separate line in the Manage Orders screen. Each record has four menu options to its right side, the most relevant of which will be Cancelled and Refund. More information on these functions can be found below.
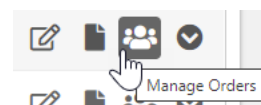
CREATE ORDER

To create an order on behalf of a user, select Create Order from the menu options towards the top of the Manage Orders screen. All Item Price records on the item will appear. Navigate to the item the user wishes to purchase and select Add Member.
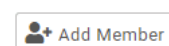
The Select Member pop-up box will appear where you can search for the user wishing to make the purchase. Once the user has been found, click the tick box next to their name (it should turn from grey to green) and then click Done.

If the Item Price record has forms attached to it (created in Field Management), these should be completed prior to finalising the purchase. Click on the Open Registration Form button to complete these forms for the purchasing user.
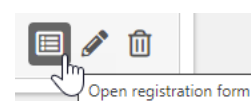
Once the user has been assigned to all Item Price records they wish to purchase, select Confirm Order. A pop-up will appear to confirm that the item has been added to the cart and an option to proceed to the cart. Select Yes, Proceed to Cart to continue to payment, or No, Not Yet to add other items to the cart before finalising the purchase. At the cart, select Pay with Card to complete the transaction with a card payment.

EXPORTING ORDERS

From the menu options above the order history, select the Export Orders (CSV) button to generate a report of all orders in CSV format. This file contains all user and purchase information. If forms have been added to the Item Price records, responses will be captured in this report.

EMAILING PURCHASERS

Should you need to contact some or all the users who have purchased an item, you can do so from the Manage Orders screen. To contact all purchasers, select the tick box in the column heading row above the orders.

To contact only some of the purchasers, use the Summary by Items view to select by Item Price. Summary by Items allows you to filter by Item Price record and select only purchasers

of a particular Item. To select individual purchasers, select the grey tick to the left of their purchase record.

Send Email   After selecting the users you wish to contact, click the green Send Email button from the menu above the table of orders. A slide-in window will appear where you can choose the reply-to email address, enter a subject line and write the email. When you're ready, click Send at the bottom of the screen.

WAITLIST & TRANSFERS

WAISTLISTS

The Waitlist is designed for members to note that they are interested in an item after the available quantity has been exhausted, where more stock is anticipated.

To view users who have joined the waitlist, select the downward arrow next to the item record and navigate to View Waitlist.
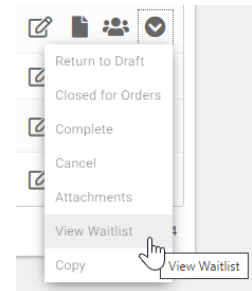
TRANSFERS

If an event registrant needs to move from one Item Price to another, or from one Item to another, this can be done via the Transfer function.

From the Manage Orders screen, select the tick next to the member's order record and navigate to the yellow Transfer button amongst the menu options towards the top of the screen.

Search for the item to which the user is moving (this may be the same item). Search by either the item name or by the Item ID.

Select the relevant item for the user, and whether you wish to transfer them directly to the item, or to the item's waitlist (in most instances, this will be directly to the item).

Click Done to complete the transfer.

Choose a ticket shown below to transfer
T-SHIRT (SMALL)
31 DEC 2099
$30.00

T-SHIRT (MEDIUM)
31 DEC 2099
$30.00

T-SHIRT (LARGE)
31 DEC 2099
$30.00

○ Copy directly into item
○ Add to Waitlist

Club Administrators must note some important housekeeping associated with transfers:

- *Completing a transfer overrides any restrictions on the destination item. If the registrant wouldn't normally qualify for purchase based on the item's restrictions, the club administrator completing the transfer will still be able to move the registrant.*

- *The original payment will still be reported against the original item. This is important for the club's Treasurer to note.*

CANCELLATIONS & REFUNDS

Club Administrators can manage orders and any cancellations or refunds from the Manage Orders screen. To the right of each order are menu options, the last two of which are Cancelled (red) and Refund (purple).

CANCELLED
If the purchasing user wants to cancel their order, click the Cancelled symbol to launch the cancellation slide-in window. Select the most appropriate reason for the user's cancellation (these have been adapted from the Event Management cancellation window), and if you want to make that user's item available for purchase again, select Yes under Update Available Ticket Place.

The cancellation slide-in window also gives the administrator the option to bulk refund all orders in the event that no orders can be fulfilled. Administrators have the option to choose between a full or partial refund (a percentage of the original fee) for all purchasers.

REFUNDS
If the user requires a refund for their booking fee, select the Refund symbol to launch the refunds slide-in window. Administrators have the option to issue either a full of partial refund (partial refunds are calculated as a percentage of the original fee paid).

To issue a full refund, leave the Refund Type as Full and click Done to process.

Refund Type

| Full Refund | ⬍ |

To issue a partial refund, update the Refund Type to Partial and set the value as the percentage of the fee you wish to refund.

For example, if you wish to refund 90% of the original value, enter 90 as the percentage value to be refunded.

Refund Type

| Partial Refund | ⬍ |

Give a percentage value

| 90.00 |