How to **Set Up** your **CLUB**

This guide has been designed to assist you in the process for setting up your CLUB ACCOUNT on the Canoe Racing New Zealand (CRNZ) Club Membership & Paddler Portal.

To get started please create a user profile, complete the two credentials and email membership@crnz.org. Once you complete this our team will connect with you to set up your Administrator Access.
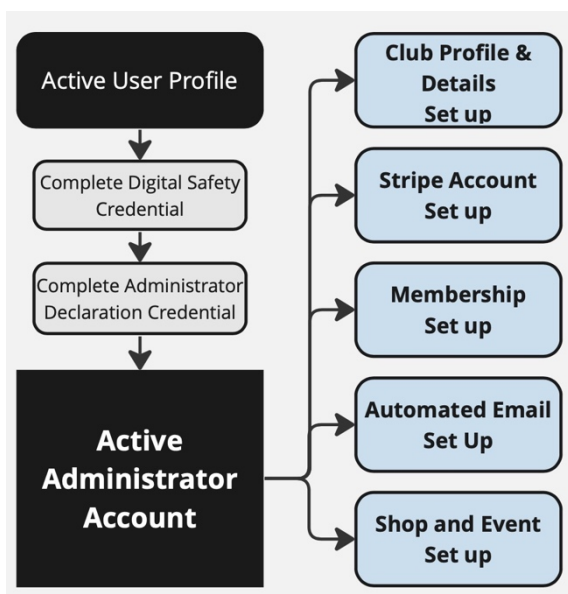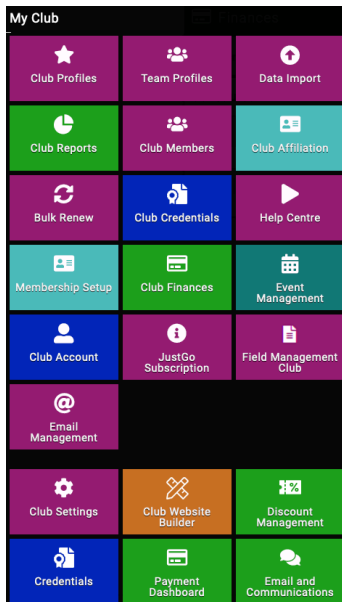

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There is further information how to manage each of the following features and functions in the Administrator User Guides.

If unsure, if you have any questions or if you require assistance, please contact us at membership@crnz.org

Once administrator access is given you will be able to access more tiles (Functions) to the left hand side of your menu screen.

Each of these tiles will give you access to either set up or manage club activity.

There is further information how to manage each of the following features and functions in the additional Administrator Guides.
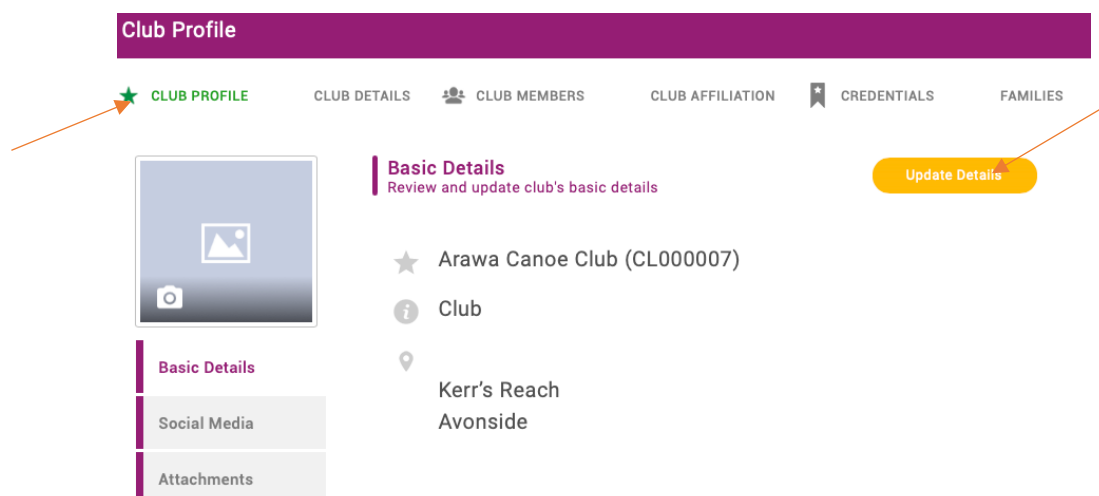
Help Centre

There are helpful videos and resources available to club administrators additional to the Administrator Guides provided by CRNZ. Visit the help centre to access this.

Club Profile & Club Details

All clubs will have a 'Club Profile' in the CRNZ Club Membership & Paddler Portal. This is where information is housed that is then fed to different areas of the system, including the Club Finder, Member Invoices, Events and Shop.
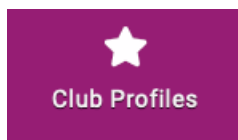
It is always important to ensure that the club information is up to date. To begin this process, click on the 'Club Profiles' tile within the menu. This is located under the 'My Club' header.

Club Profile

★ CLUB PROFILE   CLUB DETAILS   👥 CLUB MEMBERS   CLUB AFFILIATION   🔖 CREDENTIALS   FAMILIES

Basic Details
Review and update club's basic details

Update Details

★ Arawa Canoe Club (CL000007)

ⓘ Club

📍 Kerr's Reach
Avonside

Basic Details

Social Media

Attachments

UPDATING DETAILS

Click on the 'Update Details' button to make sure your basic information is up to date including the location, contact information and your geo location. Do not change your club name in this area as it will affect the connection to your payment portal.

If your club does not have a physical address, you will then be able to put PO Box detail or the Treasurer's address in a different part of the club profile to populate the member invoices that are generated from the system.

GEO LOCATION

The geo location is what is used to locate your club within the Club Finder with a location pin so it is important that it is accurate so that new members can find you.

If you do not have a physical address for your club (for example you meet at a certain spot at a park or track) or your club is showing up in the wrong location on the Club Finder map, you can manually set your geo location.

To do this, head to Google Maps www.google.com/maps and locate your Club or your meeting point. Once located, right click on the relevant point within the map and the longitude and latitude will be the first text in the box. Click on these numbers.
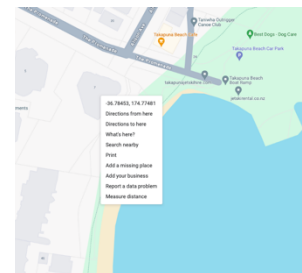
This will copy the information to your clipboard and right click and paste it into the geo location field on your Club Profile.

It is important that you DO NOT click on the generate button after you have pasted the information. Simply press save once you have pasted it.

CHECKING WHERE YOUR CLUB 'PIN' DROPS ON CLUB FINDER

To check where your club appears in the Club Finder, click on 'My Profile' from the header menu bar at the top of your screen. From the right-hand side of the screen, click on 'Select Club' under 'My Clubs'.
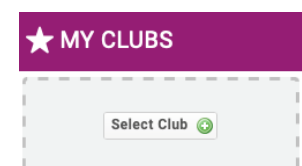
This will open up the Club Finder tool. You will see that the postcode field will be prepopulated. This will be the postcode that is in your profile. You can remove this simply by highlighting and typing over it or just deleting it. Type in your club's name in the Club Name field, or your suburb or postcode in the next field. You might see red and green pins on the map. Green indicates that you are already connected to that club.
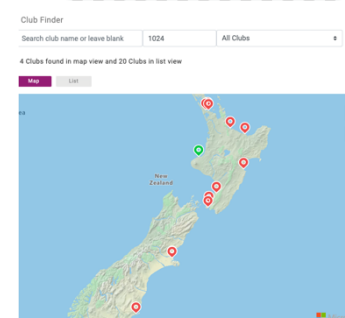
Scroll in or out to view more detail on where your club pin has been placed. If you are not happy with the positioning of your club on the map, follow the steps outlined in 'Geo Location' above. If there are multiple pins, click on the pin to view the club details.

LOGO

To update your club logo, click on the camera icon over the existing image. Then click on 'Select Image' or 'Change', locate your logo on your device and click 'Done' when you are happy with the appearance.

Logo image size is 138x177. Please be aware that in some pages of the program this image will have a circular shape so you need to choose a photo to fit that format.
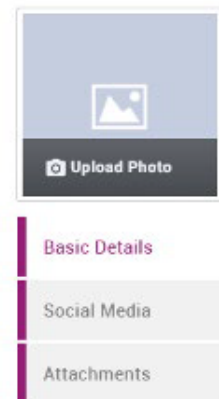
SOCIAL MEDIA

You will see a tab along the left for 'Social Media' and one for 'Attachments'. Social media information will show up on the Club Finder tool. When finished making your updates, click on 'Save'.

ATTACHMENTS

Attachments can only be seen by those with Club Administrator access to the system with permission to view your club. You may want to utilise this area as your Document portal for things like Committee Meeting Minutes and any other documentations, etc. so that your important club documents are housed in a single portal that can be accessed by all admins. This will assist when there is a change of members in committee positions in that all relevant documentation is readily accessible as opposed to being saved on someone's personal computer etc.

CLUB DETAILS

If you click on 'Club Details' along the top, it will display a page with Canoe Racing New Zealand Profile.

Please complete the following information as this is information that will be Public as part of the Club Finder.

As part of the Club Finder, members will be able to search by disciplines and club offerings as well as the existing Postcode, Suburb or Club name. In preparation of this, it is recommended that you update it now.
When finished making your selections, click on "Save".

Stripe Account Set Up

Stripe is the integrated third party software used by JustGo to enable payments through the Canoe Racing NZ Club Membership and Paddler Portal.

You will need to set up a Stripe account to enable your members to make any payments the CRNZ Club Membership & Paddler Portal/JustGo. Once your Stripe account is set up and connected to your clubs account, you will not need to log in further unless updating your bank details or to add and remove users. All financial reporting is available through JustGo as well as the ability to provide full or partial refunds.

There are two ways to set-up a Stripe Account. You can head to the Stripe website and complete the set-up or you can complete it via the CRNZ Club Membership and Paddler Portal.

SET-UP VIA CRNZ CLUB MEMBERSHIP AND PADDLER PORTAL.
After logging into your Club Membership and Paddler Portal account, from the Menu, locate and click on the "Payment Set-Up" Tile.
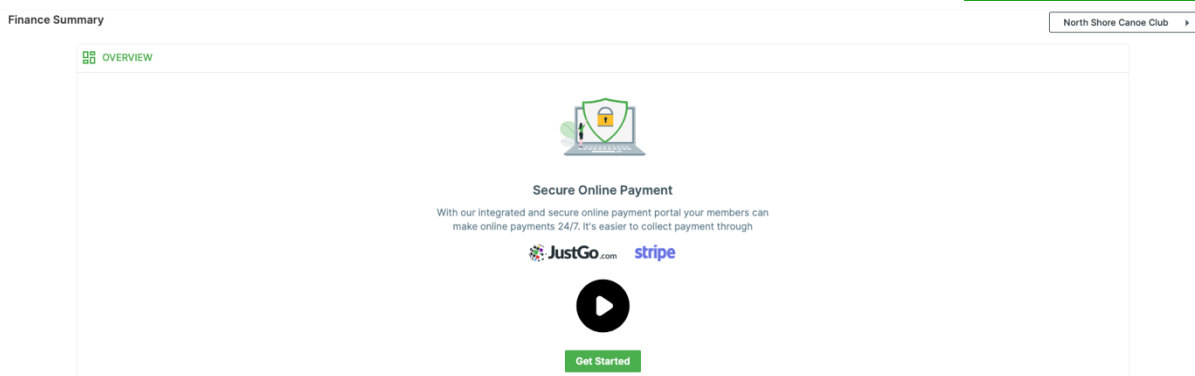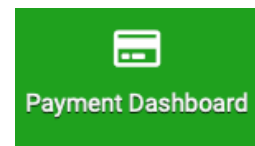
On the new screen, click on "Let's Get Started" at the bottom. This will direct you out to a Stripe Webpage where you can complete the steps below to create a new account and link it to your Club's JustGo Portal for payments.

Follow the prompts to enter your club and personal information ensuring you complete all Mandatory fields on the screen. You need to also ensure that you enter the Club's Bank Details otherwise the set-up will not be completed.

When prompted to enter your organisation type, enter Membership Organisations then Other Membership Organisations.

When you have successfully completed the linking of the accounts, you will be redirected back to the Payment Setup screen where the screen image will have changed to a "Setup Complete" confirmation screen. There is nothing further that you need to do to enable your Club to accept payments online.

Note: To create an account with Stripe, you will need to enter your email address, full name and select a password. The person creating the account should be
an authorised signatory for the club. This person will then become the 'Account Owner'. When all details have been entered click on 'Create your Stripe Account'.

You will receive an automatically generated email from Stripe asking you to confirm your email address. Actioning this step is crucial as you will not be able to complete the set up process until this is done.

If the Club Administrator is not the Account Owner, it is easy for them to be added to the Stripe account as an Administrator. The details of the Account Owner can be easily transferred if/when there is a change of personnel.

INVOICE SET UP
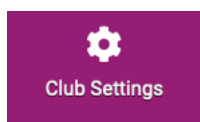
Click on the Club Settings tile to set up your club invoice information.

Your club image that is set up in Club Profile will be displayed on the invoice.

Add the information you want to be displayed on your club invoices and click save.

⚙ Club Settings	North Shore Canoe Club ⬍
← **Invoice Settings**	✓ Save

Enable these Invoice Details
If you would like to add further information to your invoice and payment receipts, then complete the below information and ensure you switch on; otherwise information will be pulled from your profile data.

⬤

Organisation Name
Please provide your organisation's Name.

Company Registration Number
Please provide your organisation's Registration Number that identifies your organisation (e.g. Company Number, ABN, EIN etc.)
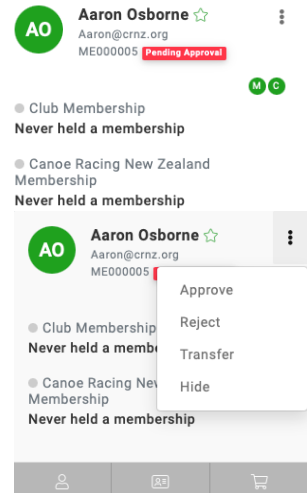
Membership Set Up

When a Club's Membership is set up, users can log into their account (or create one) and select what membership they want to purchase. Once set up these memberships show up under Membership on the user profile.
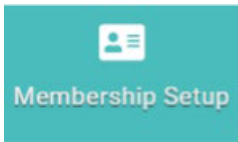
If you do not set up the Membership, an individual can still locate and "add themselves" to your Club. This is displayed as Pending Approval.

If the Club Administrators approves their profile, they will only be there as a "Member" not as someone who holds active membership with your Club.

The administrator can reject the user which will unlink the user to your club.

SET UP

All clubs have been pre-loaded with the standard membership for all basic club options.

You have the ability to setup and adapt the Memberships as your Club requires, however they must all align to the "Classifications" available in the system, being Adult, Junior, Social and Digital Subscriber.

You can update these pre-loaded membership names and settings or make inactive if they are not required by your club e.g. if your club doesn't have junior members you can make the membership as inactive.

To edit an existing membership, you can click on the pencil icon to the right of the membership line, or to add a new one, click on the 'Add new membership' button above the listed memberships.

BASIC DETAILS

There is basic information that needs to be setup for all memberships and there is mandatory information that must be entered as part of the setup.

Membership Name is what will appear as the Header on the Membership Tile and against the members name in reports and invoices etc. The name should be self-explanatory to the Members who will be making a selection.

About this Membership field will appear when someone clicks the membership tile or clicks on "More Information". This is where you have the ability to note who this membership is applicable to.

Colour is the colour of the tile. There are only a small number of colours available for selection.
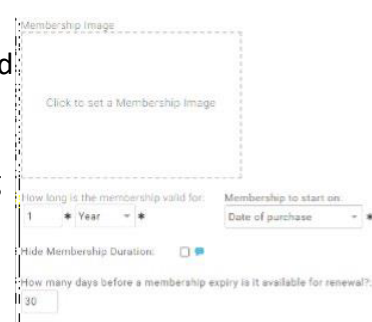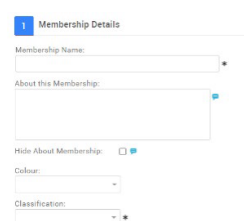
Classification is the linking of the membership to CRNZ classifications. This allows the system to automatically apply the relevant membership fees from within the hierarchy. This is a mandatory field so you will need to select either Adult, Junior, Social or Digital.

Images that are added to a membership are displayed in the tile when a member sees all the membership offerings at a club as well as in the cart after purchasing a membership. If there is no image attached to a membership, a grey area will display on the tile and no image will appear in the cart.

Length of Membership can be entered as weeks, months or years. Enter the number in the box and select the term from the drop down.

Membership to Start on is where you can define if your memberships will be for a predefined period/season or if you would like to accept "rolling" memberships where the length will be set but the commencement date will always be from the date of purchase. You can also set the commencement to be the beginning or the end of a month.

You can determine how any days prior to a membership expiring a member can renew from. The current standard is one month. You will set this by entering the number of days. This is defaulted to 30 days. As soon as the renewal window is open, your members will receive an email from the system (pending your clubs email settings in the system) letting them know that their membership is due for renewal.
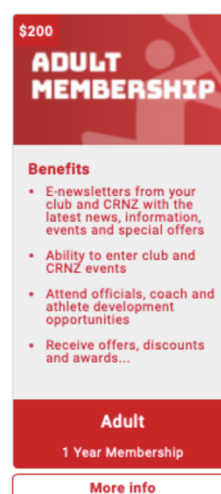
Membership Pricing is where you will enter in the Clubs portion of the fees charged to your members for that membership.

Display Price Settings gives you the ability to determine the price that will display on the tile of the membership.
It is important to note, that it will display the club portion only if you select 'display actual price', which is not the full amount that your members will be charged.
You can manually enter in a 'specific price' or you can define a 'price range' to display or you can choose to show 'no price' on the tile. The member will only see the price when they select the membership and head to the cart if this is chosen.
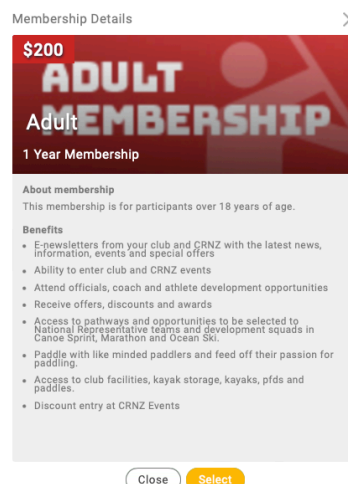
Subscriptions are "auto-renewals" (Pro version only). You can set these up to allow your members to choose if they would like their membership to automatically renew each year.

Instalments allow you to determine that initial payment amount and the number, value and frequency of subsequent payments that your members can opt into for their membership.

Tax Options will need to be utilised if your club is GST Registered. If you are not GST Registered, no worries, the system defaults to 'no'. If you are GST registered, you will need to click on "Yes". You will then get a pop-up where you can enter in your ABN (only has to be done once – you can put your GST number here).
Note: if GST is included in the price of the membership or added on top of the price you entered. This is defaulted to "include".


Membership Benefits are displayed as dot points on the Membership Tile. You can add your own Club Benefits and remove or change the order of the default ones that have been entered.
To add a Membership Benefit, click on the blue "Add a new Benefit" button. In the free text area, enter in the benefit that you wish to list and when complete, click on the green tick or the red cross to cancel. Repeat this process for all of the Membership Benefits you want to add.

Membership Restrictions, Discounts & Surcharges is where you have the ability to refine who can see and purchase club memberships, who will receive a discount based on their profile or the date and who will be charged more based on their profile or on the date. Adding a rule in restrictions is saying "Only if the following criteria are true will the membership be available for purchase".

As part of the template memberships that have been setup, there will be a restriction rule already applied which is age based. So only members who are under 18 will see the Junior Membership and equally, only those 18 and over will see the Adult Membership. You can group together multiple rules within the one membership which means the members have to meet all those rules in order to purchase the membership.

To add a new rule, click on the blue "Add New Purchase Rule" button. A pop-up will appear. At the top of the pop-up it will first tell you what type of rule you are applying, whether that be Purchasing Restriction, Discount or Surcharge. Next to that it will have the name of the Membership you are applying this rule to.
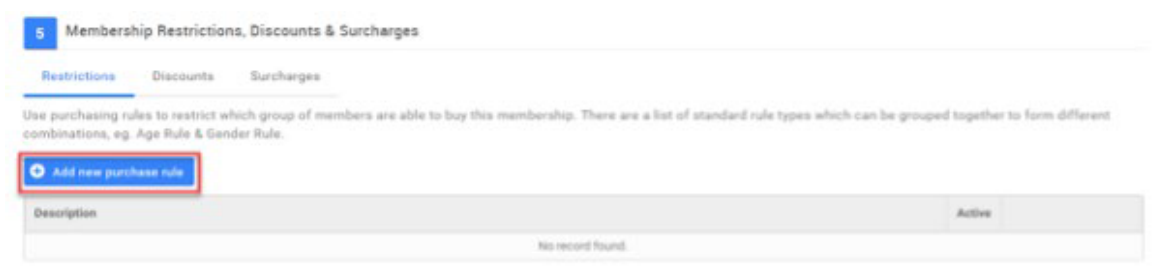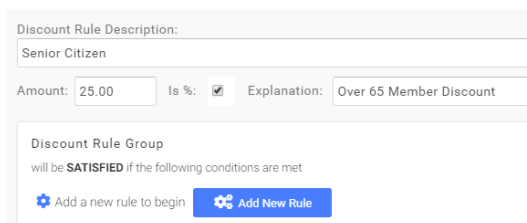

Below this, you will see tiles of the different rule grouped by the type of rule, i.e. date/age etc. To set a rule based on the age of the member, click on one of the Member Age Rule.
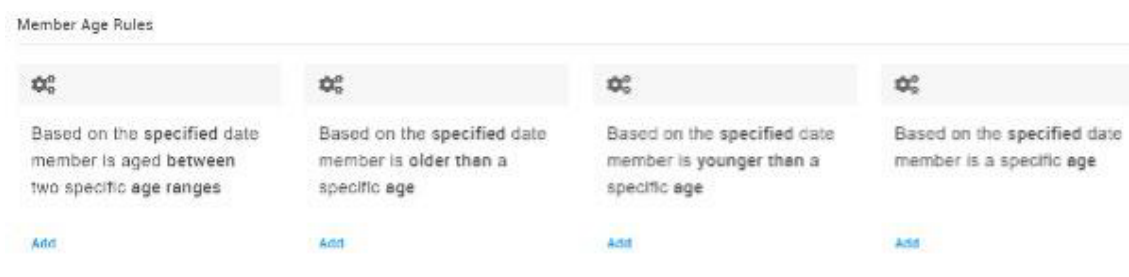
For example, if you want to restrict the purchase of this membership to members over the age of 17 only, then click on "Based on the specified Date, member is older than a specific age". After you select this rule, the pop up will close and you will be presented with an area to complete. In the free text box, you will need to change the default age to the one that is relevant to your membership setup.

To add a **discount rule, based on age**, click on the Discounts header and then click on the blue "Add new Discount Rule" button. You will need to enter in a description for the discount as well as an explanation. This might be "Senior Citizen Discount" for example.
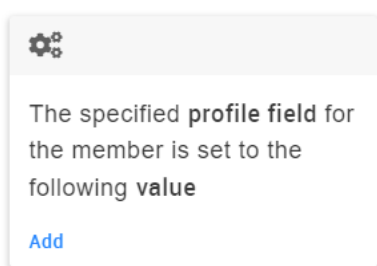
For both discounts and surcharges, the value can be either a dollar amount or a percentage. Where there is a percentage, you will need to note this by ticking the "Is Percentage" box after entering the value. After entering the description, explanation and discount amount, click on the blue "Add New Rule" button to define who this discount applies to. The information will tell you at the top what type of rule you are applying and to which membership.
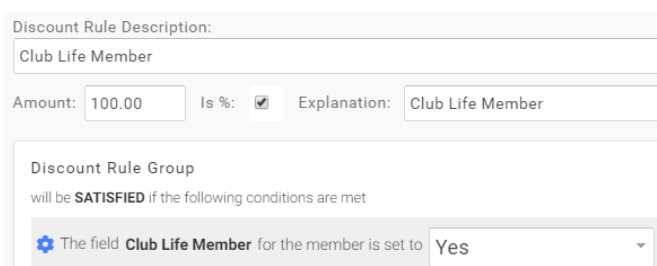
Click on the same rule button as before to specify an age-based discount. You will be presented with an area to complete. If you enter 65 as the age in the field presented, based on the examples set here, members who are over the age of 65 will automatically receive a 25% discount on this particular membership. The surcharges are applied in the same manner.

You can also apply rules based on a member field, such as if they are listed as a Life Member for your Club. Here you would select the rule tile "The specified profile field for the member is set to the following value". The field that you will then chose will be from a list of all fields setup by your club. You will select the Club Life member Rule and chose the value as "Yes". This will mean that where the Member has been listed as "Yes" to being a life member, they will receive the discount that you apply.

It is important to order your rules where there is more than one on a particular area, with the highest discount at the top. This is because where a member meets more than one of the rules you have applied, the discount or surcharge listed first is the one that will be applied. So, if you have 25% off for members over 65 years and 100% off for Members who are Club Life Members and they are listed in that order on the Membership, a Life Member who is over 65 years will only be given the 25% discount because that is the rule that is listed first.

Additional Fields (Pro version only) is your ability to assign certain fields to form part of the membership journey. When a member selects a membership tile, if you have any Additional Requirements added on here, the member will have the ability to complete this data as part of purchasing their membership. Some common fields to add as part of the journey are when Clubs require members to assist in a particular number of Club days such as events, BBQ's, Working Bee etc. In these instances, you can enter each of the events and allow the members to select which ones they would be available/willing to assist at.

See "FIELD MANAGEMENT – CRNZ Club Administrator User Support Guide" for detailed information on Form and Field setup.

Products

Products can be set-up and sold in two different ways.
1) In the Shop
2) As part of the Membership Journey (Pro Version Only)

1) In the Shop
See "SHOP MANAGEMENT – CRNZ Club Administrator User Support Guide" for detailed information on Shop Set Up, Product and Shop Management.

If your club doesn't have the Pro Version, we suggest setting up the product/products in the Shop and emailing direct to members as part of their automated membership purchase or as part of information that goes to your membership prior to membership purchasing.

2) As part of the Membership Journey
As with the other fields, you can determine which products are available for purchase based on the Membership being purchased. Once you set up products once, you will then be able to select them from a pop-up window for all remaining/future memberships that you setup. The most popular options here might be Boat Racks, Clubhouse Key Fobs etc.

From the Additional Requirements area, click on "Add Upsell Product" icon and a pop-up will appear. Click on the "Add New" button.
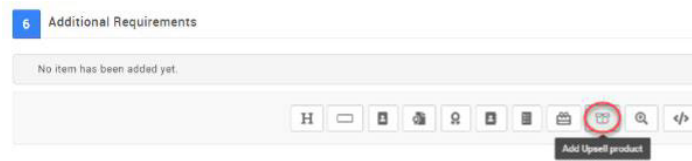
In the Name field, enter the name of your product, remembering that this is what the member will see, so you want to make it nice and simple. If you want, you can also enter a Description in the field provided.

If you enter an image here, it will appear when they are making their selection as well as appearing in the cart and on the invoice.

In the field provided, enter the Price of the Product and if your Club is GST Registered, make sure you click the Yes button under the tax field so that GST is noted on the invoice.

You can also set a maximum number that can be purchased as part of the Journey. Simply enter the number in the Max Purchase Quantity field.

As you complete the set up for your products, they will appear as a list with the image that you have uploaded, the Name, Detail and price. This is also how it appears for your members when they select the membership that you have added these products to.
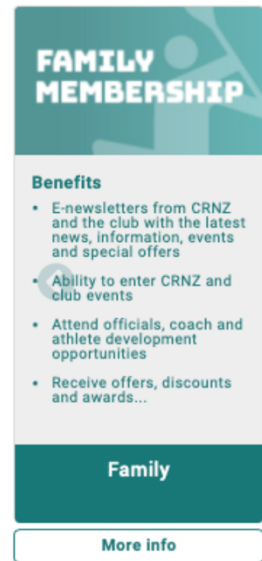
Family Membership Set Up

Family Membership needs to be configured by all clubs. Even if your Club does not offer a Family Discount, completing the Family Membership Configuration will make the purchase journey much more user friendly for your members.

If you do not want family membership, click the button after selecting configure family membership.

The Description can be edited to list the benefits and list the discount for adding a family membership.

In line with the Colour Guide, the Family Membership tile is set to teal. As with all other Memberships, you can select your own image or use one of those provided by CRNZ.

Price and Combination Setup you will see that you can setup your family membership using either Age or Type.
- Type refers to specific memberships whereby you will define each of the possible combinations of a family using each of the Memberships you deem eligible.
- Age refers to the age of the member. You will define what you deem to be an adult, then you will define how many adults and how many children (min and max) form a Family for the purposes of receiving a discount off your Club Membership Fees.

Your Club discount may differ to the one set up as a template and that is ok. Your Club's actual configuration and price or discount to be applied will display under "Family Membership Pricing" for the member when they click on the Family Membership Tile.

When you select Age over Type to define your Family Membership, you can also nominate the Price to be charged for any additional memberships purchased outside of your definition of a family. If you select Type, then all additional memberships purchased will be charged at full price. If you select Age, you will need to enter the age that you deem someone to be an adult, ie 18. You will then select the Memberships that are valid for Family Membership.

Next you will need to note the possible Combinations of a family and the value or discount. If your adult numbers differ, you can change those also. You can also set the minimum number of family members required for the Family Membership discount or pricing to take effect.

You then need to note the fixed price or discount percentage to be applied to the family membership. It is important to note that each of the members will still be allocated one of the available membership options already setup. There will not be special family memberships, this is just to make the purchase journey more user friendly and explain the discount being applied.

A list of all members within the family will appear under the membership tile and they will select the relevant Membership for each of the individuals per the images here. Only the memberships that are relevant to the selected family member will be available for selection in the popup.

If you change the drop-down next to "Price" to Fixed Price, you will need to enter the total amount to be charged for all members added in as part of the Family Membership Journey. If you provide a Percentage discount on the Club fees rather than offering a fixed price, you will select Percentage and enter the discount percentage in the area provided, to be applied to the Club Fees. Any discounts will be shown in the cart after completing the full membership purchase.

If your Club is registered for GST you will need to tick "Yes" under the "Do you need to charge tax for this membership?"

You will then select the price to be charged for any additional Adults and Children. "Additional" refers to any other memberships being purchased where the maximum number set up in your combination has already been reached. You can set it so they are charged Full Price, or they are added in Free of Charge or you can Set a Specific Price.

In the Display Price Settings, you will select if the price displays on the Membership Tile or is hidden. If you chose to show a price, you can set this to be either a price range or a Specific Price. This will display on the top left side of the membership image.

Under "Settings" you will have the ability to set the Family Membership tile to display first in the list of Membership Options or Last. It is recommended that this option is set to last to enable members to view the details for all of the other memberships offered at your club including the detailed "About" information and the Benefits specific to that membership.

Email Management – Automated Emails

The CRNZ Club Membership & Paddler Portal has pre-defined emails that are triggered by system events such as membership purchases, renewal notifications and when someone registers for an event. CRNZ has pre-loaded some generic text for these emails as well as a generic template however each Club is able to customise both the content and template to be specific to your Club.

The emails will only send for your Club if they are set to 'Active'. Your Club's E mail Management profile has been set with the core default emails set to 'Inactive'.

From the menu, locate and click on the "Email Management" Tile which is under the Club section. You will then see a list of all the system triggered emails already set-up for your Club.

Before we look at editing the text / content within each individual email, we will first look at setting up the template that all of your system triggered emails will come from.

EMAIL TEMPLATE
From the menu bar at the top of the Email Management screen, select "Email Templates" then you will see that there is a template named "Default Email.
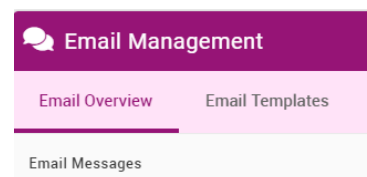
Click on the copy to access and edit the generic template or click the Add New Template to create a new template. You can update Club details and customise this template to include your own Club logo and Club colours etc.

The "Organisation Name" and "Organisation Email" details are extremely important as the details written in "Organisation Name" will be used to populate #merge fields in the email content and "Organisation Email" is the default email address all system triggered emails will be sent from (and replies received to).
Once you have changed the information press "Save".

To update the logo, click on "Header" and then Upload Logo. You can also enter a link such as your website to the logo so that when it is clicked on, it will link the user out to that website.

To change the colour of the green heading band or the text within it, click on "Body" then click on the cog next to Background colour and Text colour. You can select from set colour options or manually key in the Hex code for your logo colour.

Once you have finished making changes to the template click Save to exit.

EMAIL SEND FROM ADDRESS AND CC'ING CLUB ON AN EMAIL
As outlined above, all system triggered emails will send from the email address that is entered into the "Organisation Email" field on the club Email Template. You can override this for a specific email type if required.

From the menu bar at the top of the Email Management screen, select "Email Overview" then you will see infographic circles that you can click on to access the topic specific emails. The emails marked with the green tab are the emails that are set to active.
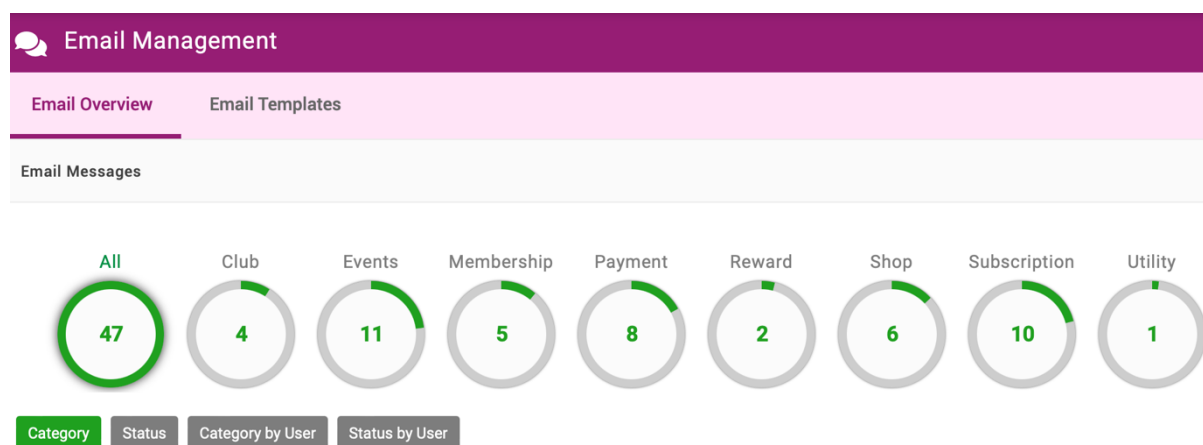
To edit the send email address of an individual system triggered email, click on the edit pencil, key the desired email address into the From field under Content Edit. If you wish to CC (copy) the Club on a specific email, enter in the email address in the CC field.

EMAIL CONTENT / WORDING
To edit the content / wording of each email, scroll to the bottom of the screen and overwrite any of the text you wish to alter.

To add key fields from the JustGo database to your emails, use the # icon to add #merge fields from a limited preset list. You can do this for the email Subject line as well.

**CREATING NEW SYSTEM TRIGGERED EMAILS**
You are able to create additional system triggered emails for specific membership types as long as they are based on the same trigger criteria as an existing email. For example, you will need to send a different "On Purchase email" to people taking out a 'Adult' Membership and you may wish

to send a different email to new members who purchase a "Junior" membership verses a member who renews.

To see the trigger criteria, from the Email Overview screen, click on the edit pencil to the far right of the relevant email and refer to the Description field at the top of the email under General.

Once you have located the correct trigger event (e.g. in the example above "Membership – on purchase"), return to the Email Overview page and click on the Copy icon, located to the far right of the relevant email.
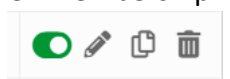
Rename the copied email to a relevant name in the Name field (e.g. in this example On Purchase – Paddle Club) then customise the content as per instructions above. To define which membership the email is to be triggered for, click on the arrow in the membership field and select the relevant membership type.

The outcome of this change is that the original On Purchase email will be triggered for all other membership types and the new membership specific email will be sent to the specified membership type only (in this example New Joiners).

ACTIVATING / DEACTIVATING SYSTEM TRIGGERED EMAILS
The emails marked with a green tab are the active system triggered emails.