

# Managing your CLUB



This guide has been designed to assist you in the process for helping manage your club on the Canoe Racing New Zealand (CRNZ) Club Membership & Paddler Portal.

To get started please complete the CLUB SET UP prior to reading this document. Once you have completed the set up this document will help you manage your club on the Canoe Racing New Zealand (CRNZ) Club Membership & Paddler Portal.

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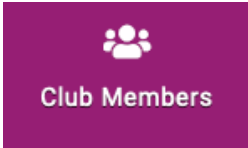
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There is further information how to manage each of the following features and functions in the Club Administrator Guide Section of the Support Page on CRNZ website.

If unsure, if you have any questions or if you require assistance, please contact us at [membership@crnz.org](mailto:membership@crnz.org)

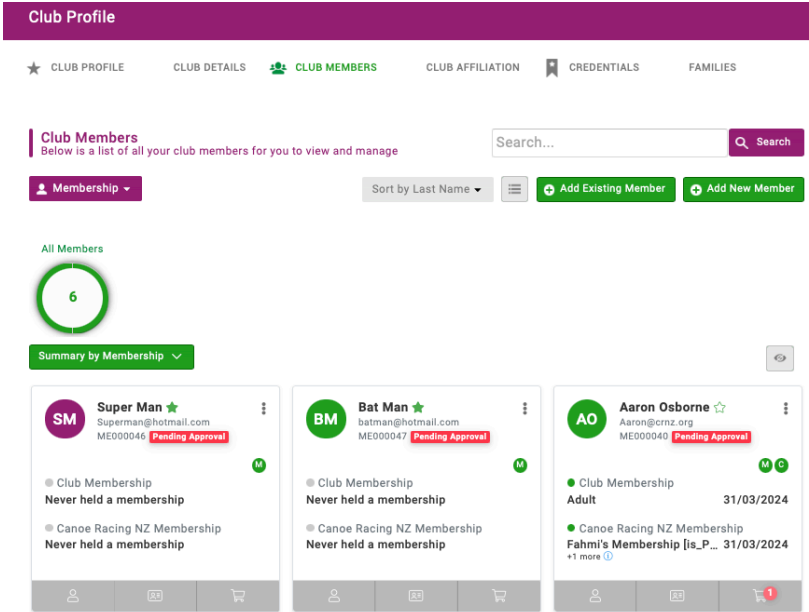
# Managing Member Profiles

From the Menu, select “Club Members”, or, if already in the Club Profile area of CRNZ Club Membership & Paddler Portal, click on the words “Club Members” which is located under the purple header.



## MEMBER OVERVIEW

By default, this page will show you a list of your members by Membership. There will be infographic circles near the top of the screen which will display each of the memberships set up at your Club and the number of members that hold that membership. You can click on any of these circles to display just the members registered to this Membership.



From this page, you are also able to search for members by using the search bar to the top right. You can enter in a first name, last name or email address. Click on “Search” after entering in details and all matching member “Tiles” will appear on the screen.

You can change the view of the members by clicking on the green drop down “Summary by Club Membership” button where you will be able to select to change the view by renewal status, role, Club Members Status and Member Status.

You can also change the display view from Tiles to List. To do this, click on the small square icon to the left of “Add Existing Member”. You members will then appear in a list as displayed below.

## ADD MEMBERS



To add a new member who has never had a profile within CRNZ Club Membership & Paddler Portal previously, click on the green “Add New Member” button. If it is an individual who has held membership with any affiliated Club but not your own, you will need to click the “Add Existing Member” button and search for them using their email address and date of birth. The system will send an email to the Member requesting confirmation that they agree to be added to your Club. You must add a birthdate for the member – if you don’t know their date add the Birthdate 01-01-1900 and ask the person to update once their profile is active.

When clicking on the “Add New Member” button, you will be presented with the same sign-up form as individuals will see on the login screen. Complete all mandatory fields. The username will automatically populate with the email address entered on the form, however this can be changed. When you are finished entering their details, click on the declaration tick box and then click “Continue”.



**Add member**

First Name  Last Name

Email Address

Contact Number (optional)

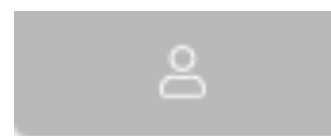
Date of Birth

Day  Month  Year

You will then be able to select to add another Member, Edit the Member you have just created or add Membership to the Member. Click on the relevant button.

### EDIT MEMBER DETAILS

To edit a member, click on the profile icon.



This will take you into their profile. You will be able to select which area of their profile you want to look at or update by navigating through the grey menu options to the left under their profile image. You can click on the yellow “Update” buttons or the “add” buttons throughout each of these areas.

To view the members answers to any of the Forms that you have set-up at your Club, click on the “Additional Details” tab in the grey menu options. On the page that comes up, you will be able to see your Club listed along the top.

**Basic Details**  
Review and update your personal details Update Details

Super Man  
Superman@hotmail.com  
Male  
01/01/2012  
Rangitoto  
Rangitoto Island  
Auckland  
1024  
Auckland  
New Zealand  
1111111111  
Superman@hotmail.com

When you click on your Club tab, you will then see any of the Forms you have set up and the Members results. If you have any fields that are only managed by the Club (hidden or set to not editable by the members e.g. Life Member) this is where you will update those fields. Be sure to click on the “Save’ button at the bottom of the screen when making changes.

If you have Life Members at your Club, you can view/edit and update this field for the members through this area.

### ASSIGNING MEMBER ROLES

To grant a member Club Administrator access to your Club or to assign an additional role to a Member, such as Secretary, President or General Committee Member, click on the “Club Role” tab from the left-hand side and click on the “Update Roles” button.

**Club Role**  
Please select role for member Cancel Save

Member  Member Protection Officer  
 Coach  Health and Safety Officer  
 Child Protection Officer  Privacy Officer  
 Secretary  Membership Manager  
 Treasurer  Disability Inclusion Officer  
 Event Co-ordinator  Team Manager  
 President  Coach Coordinator  
 Vice President  Volunteer Coordinator  
 Committee Member 1  Officials Coordinator  
 Regional Admin  Marketing and Promotions  
 Event Promoter  Committee Member 2  
 Event Officer  Committee Member 3  
 Club Administrator

All of your members will have “Member” ticked by default. You can select their roles within your Club by clicking on the tick box next to the relevant role. When

you have finished, click on the “Save” button, then click on the “Back to Members” button above the member profile picture to repeat this process for the rest of your members.

It is important to remember to untick the Club Administrator box if someone leaves your Club or no longer requires administrator access to ensure security of your club and member information. Club Administrators should have completed the Digital Safety E-Learning Course and the Administrator Declaration prior to you giving Administrator access.

## MEMBER ROLES

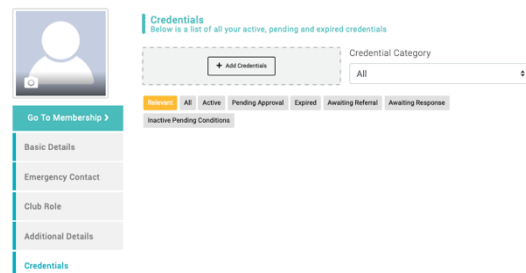
- **Club Administrator** - FULL administrative access to the Club and Members within the system.
- **Event Administrator** - administrative access to the Event Management area and the Field Management area allowing set-up and administration of events for your Club and creating and editing event forms.
- **All other roles** are titles only and do not give any special permissions

*Note: DO NOT remove the Club Administrative role from your profile unless absolutely intending to do so. You will no longer be able to access any of the administrative areas if you do.*

## MEMBER CREDENTIALS

You can view the credentials that have been added by a member by clicking on the “Credentials” button.

To view the details of the Credential such as the Number and any supporting documentation that was uploaded, simply click on the tile with the credential details you want to see. This will open up a pop-up which will show the detailed information.

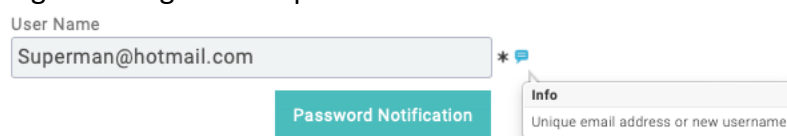


## MEMBER USERNAME AND PASSWORD

You can view a member’s username from the main screen in Basic Details. Scroll to the bottom of the screen. Under the phone number field at the bottom of the page, you will see a small head and shoulders icon. The text to the right of this is the members username. Neither the member themselves or you as Club Administrator can update a username. If you require this to be done contact [membership@crnz.org](mailto:membership@crnz.org)

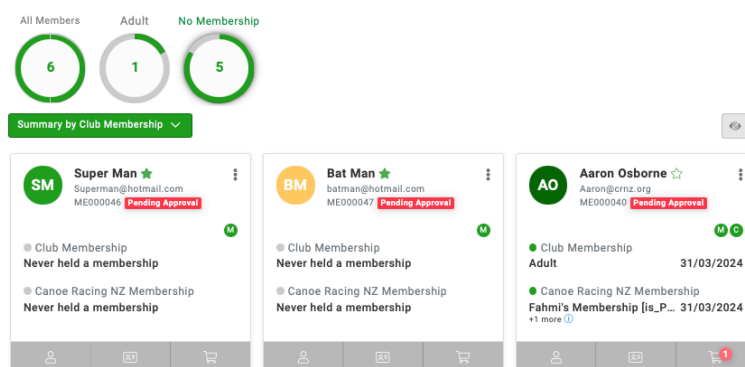
To reset a member’s password, click on the “Update Details” button from the Basic Details screen, scroll to the bottom and under their username field, you will see “Password Notification”.

Click this button to send a password reset to the members email address. You will receive an on-screen message advising that the password reset email has been sent.



## REMOVING MEMBERS FROM YOUR CLUB

If there are members within your Club who have not been active for a while and you no longer wish to view their record when in Club Members, you can remove them. To do this, when looking at Club Members in Tile View, click on the three dots to the top right of the Member tile and select “Remove from Club”.



The Member profile will still exist in the database and the record of the Membership they held with your Club will remain against their profile, however you will no longer be able to view or access their details.

In the event that you want to re-engage with non-returning members in the future as part of a Membership drive, it is not recommended that you follow this process as you will no longer have access to these past members.

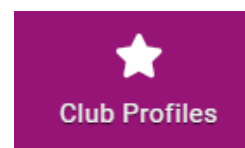
## PENDING APPROVAL

Pending approval – means a user has linked themselves to your club. If you approve, the CMR will process the person as a member. ONLY approve if they have purchased a club membership. If you don't want this person linked to your club click the three dots and reject the user.

## Managing Families

### MANAGING FAMILY GROUPINGS

It is important to note that when members are grouped together as a family, they will each be able to manage the profiles and memberships for all members within the group when they log into their account. So only families/those who should have access to each other's accounts, should be grouped using the Families functionality.



When referring to Families in CRNZ Club Membership & Paddler Portal, this is only the “Grouping” of individuals into their family group. This is NOT a connection to a family membership and does not automatically qualify anyone for a family discount.

From the Menu, locate and click on the “Club Profiles” tile. On the new page, click on the word “Families” which is located under the purple header. You will also see this option if you are in the “Club members” area of the system.

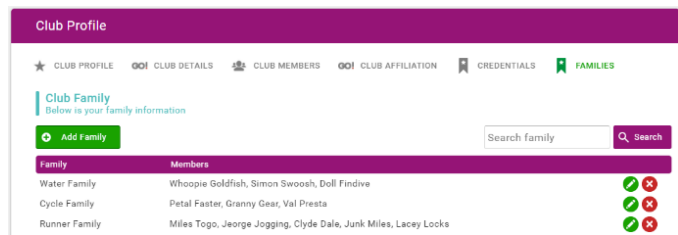


Any families that have a connection to your Club will appear here. In some instances, not all of the family members will belong to your Club. Where this is the case, you

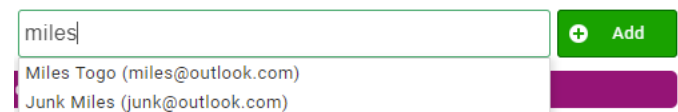
will not be able to see that members details, only that there are additional people within the family who not part of your Club. They will show as “+ 1 Member”

### ADD A FAMILY

To add a Family, click on the green “Add Family” button on the screen. By default, the family name will be “My Family”. To change this, click on the small pencil icon, change the name then click on the small green tick to save.



Next you will need to select which members from your Club are part of this Family Group. To do this, slowly type the name/s in the search box and click on



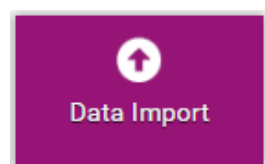
the relevant member name then select the “Add” button. Repeat this process for all individuals you want grouped together. When finished, click on the yellow “Save” button at the bottom.

### EDIT A FAMILY

To edit a family, click on the green pencil icon to the far right of the family in your list. You will be able to edit the family name, add members (only those within your Club) and remove members. Follow the steps listed above to edit the family name and add members. To Remove members, click on the red “X” to the right of their name. Click on the yellow “Save” button when done. Any changes that you make to a family will be reflected when any of the members within the family log into their profile. This includes the removing of members.

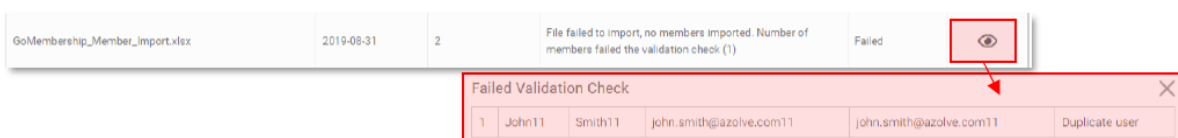
## Importing Members

You can import individuals into the system via a csv file. It is important to note that importing members only creates a profile in the system which will be connected to your Club. It does not add a membership to the individual.



Further to this, only members who do not already exist in the system can be imported.

There are validation checks in place when the file is imported. You will receive an on-screen notification as well as an email if for any reason a profile is not able to be uploaded. You will also be able to see this information through the data import screen. If you click on the eye icon, you will see the error record and reason.



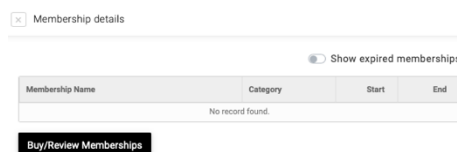
Before you do this, please contact [membership@crnz.org](mailto:membership@crnz.org)

## Managing Memberships

### VIEW MEMBERSHIPS

You can view the Membership that is held by your members when in their profile. You can also manage memberships on their behalf. To do this, click on the middle icon at the bottom of the members tile you will then be able to see all of their current memberships.

Click on “Show Expired Memberships to view their membership history”.

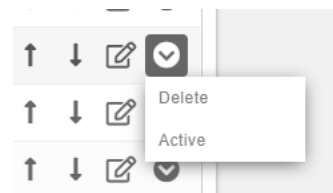


### MEMBERSHIP – ADD

If you need to process a membership purchase or renewal on behalf of a member (e.g. you are helping them over the phone with a credit card payment) you will need to “Add” a membership for them.

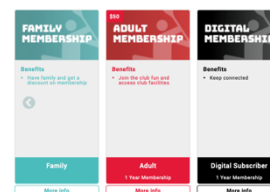
For online clubs (Those who are using the portal to purchase club memberships, please skip the next paragraph).

*If your club is an **offline club** (i.e. doesn't take membership payments online) please note that prior to commencing the steps below, from the main Menu scroll down to Membership Setup, then on the next screen click on the down arrow at the end of the membership you need to process and select Active. Complete to the end of step 'c' below then return to Membership Setup to click on the down arrow and select Archive to return the membership to an offline state. Failure to do so will mean that your membership will be visible online which will be confusing for members and prospective members.*



Following the steps in View Membership (above) to access the membership area for a Member, click on the “Add” button to be taken to the Membership Tile view if you are not taken there automatically.



Make your Membership selection by clicking on the relevant membership tile. If you have set-up any additional questions or products that can be purchased by members you will need to enter this information (or skip for non-mandatory fields).



When complete, at the bottom of the screen you will be able to select either “Save and Continue” or “Checkout”. If you are managing the Memberships for more than one member, select “Save and Continue” this will take you back to the Member List where you can add memberships for additional members in your Club by following the same steps as above. You will need to click on the “No, Not Yet” button on the Cart Pop-Up until you are ready to either pay for all of the Memberships via a Credit Card.



When you proceed to the checkout, you will see all memberships purchased for all members.

	<b>Adult (Bat Man)</b> <b>Paradise Island Club</b> <small>When purchasing a Canoe Racing NZ (CRNZ) Affiliated Club Membership, members automatically receive a CRNZ membership.</small>		1	\$50.00	\$7.50	\$57.50
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You will also be able to remove any memberships incorrectly selected for a member by clicking on the “Remove” button under their Club Membership.

“Pay with Card” to process payment online for the membership.

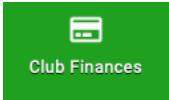
## Managing Membership Finances

### FINANCE OVERVIEW

Please do not manage any of your Finances via the Stripe website.

CRNZ Club Membership & Paddler Portal (JustGo) is integrated with Stripe and therefore ALL transactions and refunds etc are to be viewed and transacted via the portal. **CAUTION:** You will break the link between the funds and the transaction if you perform any refunds etc in Stripe.

From the Menu, locate and click on the “Club Finances” tile.



This will take you straight to the Payment Summary screen where you will see an overview of payments by the Current Month. You can change the view by making a selection from the drop-down box on the left-hand side. This only changes the summary data at the top of the page. It does not filter the invoices listed out below.

★ Club Finances
Paradise Island Club

Payment Summary
Subscription Summary
Instalment Summary
Planned Payments
Failed Payments

Breakdown of your club payments

Payment Summary

Payments	Received Income <span style="color: red;">?</span>	Fees
NZ\$0.00	NZ\$0.00	NZ\$0.00

Payment Breakdown

Memberships	Events	Other
NZ\$0.00	NZ\$0.00	NZ\$0.00

Under the summary you will see a list of payments. You will be able to see the payer name, the payment method, the value and the status. You can click on the settings cog to the far right to see more information on any of the payments/invoices. This will show you all of the people on the invoice as well as all of the Club Products purchased for each of them.

Payments Search...

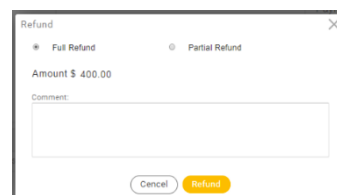
Reference	Date	Payer Name	Type	Method	Total	Status	
PR000011	30/01/2024	Aaron Osborne	Payment	Other (Admin Pay)	NZ\$57.50	Paid	⚙️

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Displaying 1-1 of 1

## REFUNDS

In the CRNZ Club Membership & Paddler Portal (not Stripe) you can process refunds for any memberships that have been paid via credit card. This will refund the money straight to the payers credit card. To do this, click on the settings cog to the far right of the record. You will then be taken into a copy of the invoice/payment record. You will see to the right you can click on “Refund” or at the bottom of the list of memberships/items paid for, you will have “Refund All”.

If you need to make a full refund of all fees paid to your Club by this member, click on “Refund All”. In doing this you will be presented with a pop-up to enter in any notes to add to the refund. When you are finished, click on “Refund”.



If you are only processing the refund for one member in the invoice or only some of the items/memberships purchased, click on the “Refund” button to the right of the record you want to refund. You will be presented with a pop-up where you can select to make a full or partial refund. If you select partial, even if you make multiple refunds on the one record, you will only ever be able to refund up to the full value that the member paid. You will then see the summary screen updates with the status of either Refunded or Partially Refunded in the Status Column of the payment record.

Gross	Max Refundable	Refunded	
\$400.00	\$400.00	\$0.00	<input type="button" value="Refund"/>
			<input type="button" value="Refund All"/>

## SUBSCRIPTIONS (AUTORENEWALS) & FAILED PAYMENTS

From the Club Finances area you will also be able to view a list of the “Subscriptions” set-up for your members as well as details on any failed payments.

If you click the “View Plans” button next to a member record, you will see the details of which membership (including any add-on items) are set to auto-renew and when.

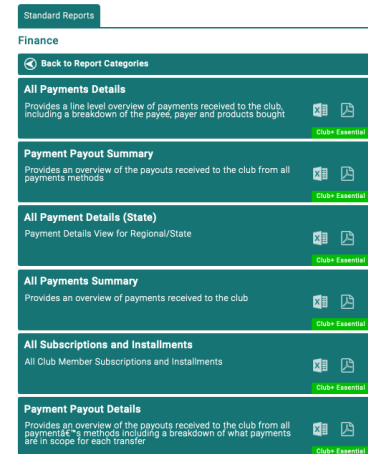
If you need to assist a member with updating their credit card details, you can do so by clicking the “Update Card Details” button. You will not be able to see the existing card details except for the censored data on the summary page, but you will be able to enter in new credit card details.

## RECONCILIATION REPORT

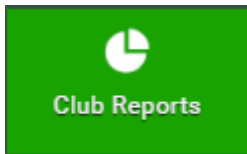
One of the standard issues reports in CRNZ Club Membership & Paddler Portal is the Payment Payout Details report.

This report details the payments that have been made to your Club's bank account (from your Stripe account), the payer information, amounts paid including fees and date information. This report will only show you the payments that have been deposited to your account.

There are other, more detailed finance reports available.



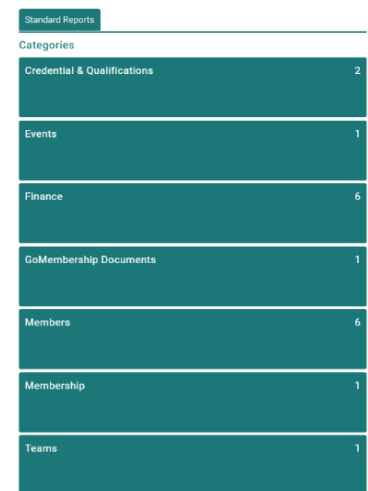
## Reports



There is a suite of reports available covering all areas of the portal including Events, Members, Memberships, Finance and Credentials. From the Menu, locate and click on the "Club Reports" tile. You will

then see different categories listed. Click on each of the tiles to view the reports within.

When you have located the report you want to run, click on either the excel or pdf icon depending on your preferred report output format. The report will automatically begin to generate.



## Discount Codes

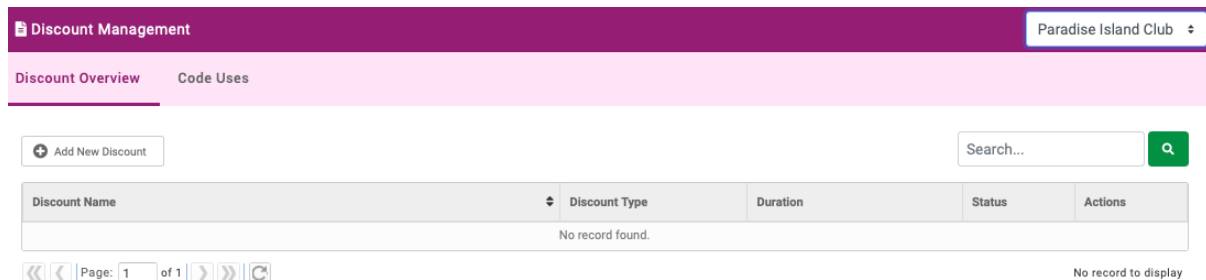
Discount codes can be used on Club memberships to give a partial or full discount at the checkout.



### CREATE A CODE

To create a code, please go to the Discount Management tile under the Menu button

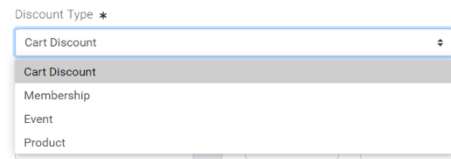
Select the Club that the discount is for and click Add New Discount



Next, give the discount a name in the Discount Details field. A description is optional but helps for reporting, so enter details as necessary.

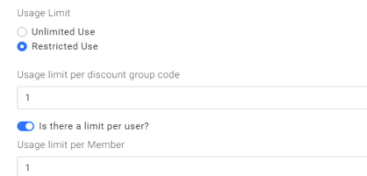
Discount type is to specify which type of purchase the code is to be used for:

- Membership
  - Only a membership purchase
- Event
  - Only an event purchase
- Product
  - Only a product purchase
- Cart discount
  - Anything that may be in the cart (including all of the above types)

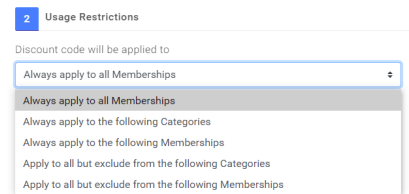


Set a start and end date for the validity of the codes

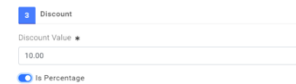
Usage limits is where you can specify the number of uses and whether they have to be unique (ie if you wanted to allow an individual to use the same code multiple times you can otherwise set them to only use by a person once)



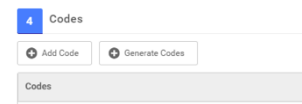
From there, in usage restrictions, if we wanted the discount to only work with a specific type of purchase, this drop down appears to allow you to put conditions on it. If selected, a window will appear to let you specify those items based on what is available with the club. This will feed from the clubs already set up membership, events and product items.



Discount Value provides a field to enter the discount you want to provide. The slider lets you change between a % or \$ figure for the value above.



Use the Codes window to create the code. There is also an option to bulk-create codes based on the parameters above. Please note, you won't be able to generate codes until you have completed some items above (it will prompt and highlight missing items).



When adding a code it will let you create a code/set of codes including if you want to put a prefix or other text around it. Once done click on save.

The Codes window will show all available codes, including usage (this will come later). Finally here you will click on save and the created code should be ready to go.



At the checkout there is a section to enter the discount codes in. If the code you used matches with any of the conditions behind it, it will activate and discount as appropriate

Discount codes can be used on club memberships to give a partial or full discount at the checkout.

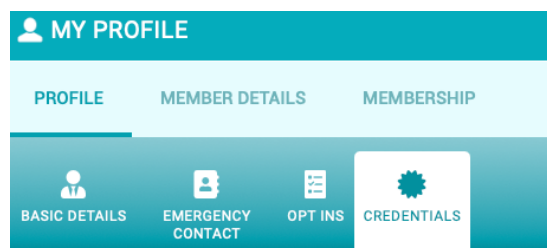
To create or view codes, please go to Discount Management under the Menu tile

## Member Credential Approval Process

Credentials are recognitions linked to a members account. For example, they can be qualifications, awards, challenges, recognition of attendance or declarations.

Members can add credentials against their profile by:

1. Adding at the membership purchasing process, or
2. Adding through the Credentials tab under 'My Profile', or
3. Through attending a course and the deliverer of the course adding the credential.



### Credentials

Below is a list of all your active, pending and expired credentials

Members can add details for their credentials from the following areas: Safeguarding, Para Canoe, Coaching, Safety, Coaching Awards, Officials Awards, Try Learn Explore, PaddleAble, Officiating.

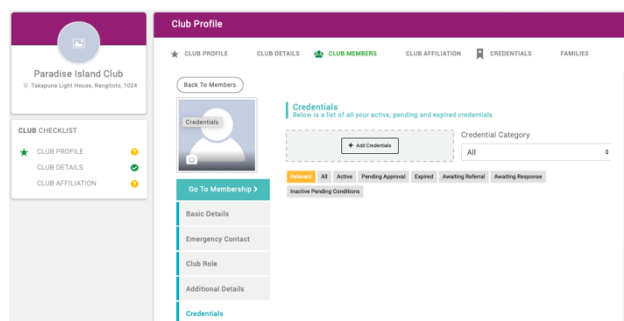
Some credentials require approval and can be managed by clubs, such as Try Learn Explore and Police Vetting. However, most of the credentials are managed by CRNZ as they relate to CRNZ based awards or workshops.

### ADDING CREDENTIALS TO CLUB MEMBERS

Club Administrators can add credentials to member profiles. However, if it is a credential that needs CRNZ approval it will be added as 'Pending Approval'.

To add a credential for a member. Click on the Club Member Profile then credentials.

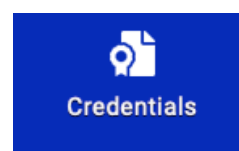
Add the desired credential and press save.



### APPROVAL PROCESS

To approve the credentials, please go to the Credentials icon.

From here you will see all your members credential information and the status.

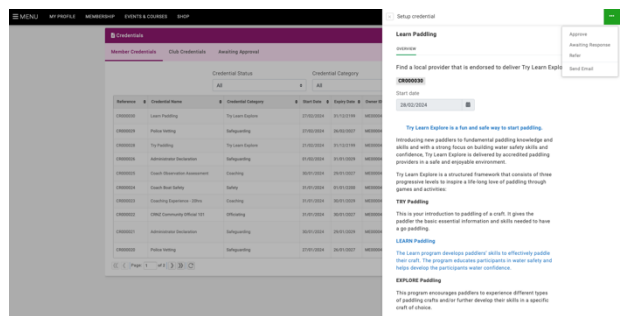


### Checking Credentials

Check any documentation provided by the member by looking at the credential in the member's profile. This can be viewed under the 'Club Members' tile, clicking on the member's tile and then the 'Credentials' option on the left-hand side menu.

You can also contact the member for further information if required.

Confirm the Credential is Approved  
 If the member has uploaded a document, you will be able to see this and download to check the document has the required information.



Once you are satisfied that the member's credential should be approved, please denote this by selecting approve.

Once you have approved press save.

### POLICE VETTING APPROVAL

Clubs have the ability to process NZ Police Vetting. Clubs and administrators need to ensure you have the correct approval to process this with NZ Police.

Once the Vetting Process has been completed by NZ Police, the club administrator can update the

Ensure you update the start date of the credential to the date you received the result from NZ Police.

Update the fields in the CLUB or CRNZ Administration section.

Once complete - Click Save

Club or CRNZ Administration to complete the following:

- CRNZ or Club Administrator to complete after processing NZ Police Vetting \*
- I have the authority to process the NZ Police Vetting on behalf of the organisation
  - I have complied and will comply with the Approved Agency Agreement
  - I am satisfise as to the identity of the person being vetted
  - I have obtained the authorisation of the person being vetted to submit this vetting request as set out in section 3 of the NZ Police Vetting Service - Request & Consent Form

I have completed the Police Vetting Request through the NZ Police and confirm the result was : This application is now complete and New Zealand Police have no information to release on this person under the details supplied. NO RESULT \*

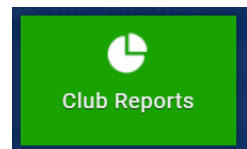
No

Name of person submitting the NZ Police Vetting Service Request \*

- This application is now complete and New Zealand Police have: \*
- No Result: No information to release on this person under the details supplied.
  - Release Information: Information has been released from NZ Police and needs consideration.

### CREDENTIAL & QUALIFICATIONS REPORT

Club administrators can run a report to check the credentials uploaded by their members under the 'Club Reports' tile. It is suggested that the report is run on a monthly basis to identify any new credentials that have been added. To view access the report, click on the 'Customer Reports' tab and then 'Credential & Qualifications'. You will then have the option to run a report titled 'All members with Credentials' as either an Excel file or PDF. Select Excel. Once the report has run, click on the file to open it.



Note: Coaching Awards such as Try Learn Explore Coach and Development Coach Award are located as credentials not qualifications.



## Email and Communications

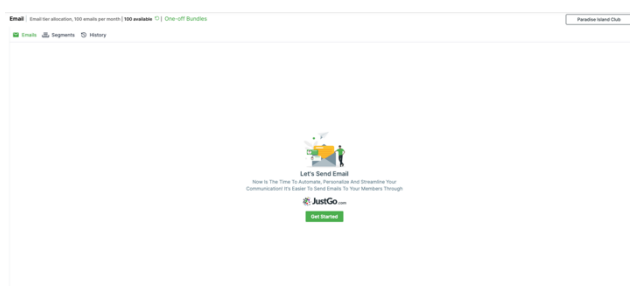
“Email and Communications” functionality allows you to email your Club members ad-hoc. It should not be confused with the “Email Management” area of the system which is the automatic “action based” sending of emails (for example, the automatic confirmation email when a membership is purchased).



Through Email and Communications, you can communicate with your members as required. You can also select which members to email.

### NEW EMAIL

From the Menu, locate and click on the “Email and Communications” tile. On the new page, click on the Green link with the envelope “New Message” or click get started.



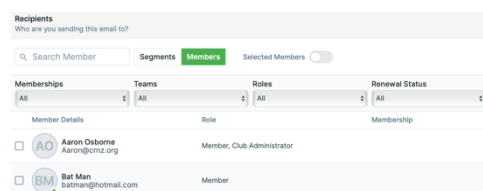
### SENDER EMAIL

When the page loads, you will see that the sender email address will be the one that is attached to the Member profile who is creating the email. You are also able to select the email address that is listed in the Club profile from the drop down selection box.



### RECIPIENT OPTIONS

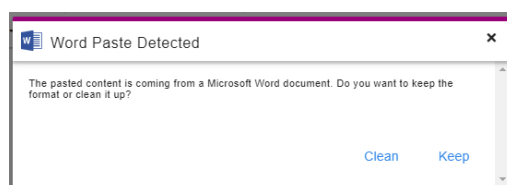
To add recipients, click on the “Select Recipients” button. You will then be presented with a segment or members. Click on the members list to search specific members groups renewal status or groups or roles.



**SUBJECT:** Write an engaging subject line to get the attention of your audience.

### EMAIL CONTENT BODY

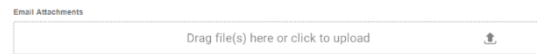
Within the email body, you have normal email type functionality. You can also copy data from Microsoft Word and paste it into the email body. Doing so will result in a pop-up notification advising that “Word Paste Detected”. You will then have the option to keep the formatting as it appears in Word or to clear it down so it will be pasted in plain text. Any images copied from within the Word Document will also be copied to your email.



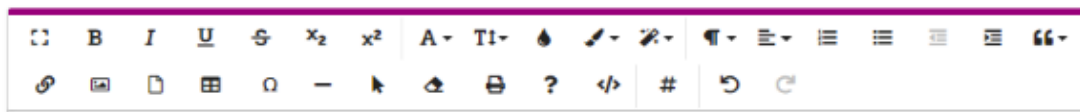
You can add images by clicking on the small image icon and selecting an image from your device

It is important that there are NO SPACES in the file name of your image as this will create a broken link in the sent email. Amend your file name as require PRIOR to inserting/uploading. You can link a document in your text by clicking the upload file icon

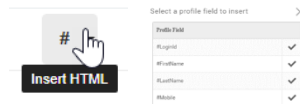
You can also add a file as an attachment by click on the email attachments area at the bottom of the screen.



There are a range of other formatting options along the top of your email including Font type and size, colour of font and background, alignment, hyperlinks and bullet point formatting.



You also have the option to personalise your email by using “Profile Fields”. Click on the “#” from the email header area.

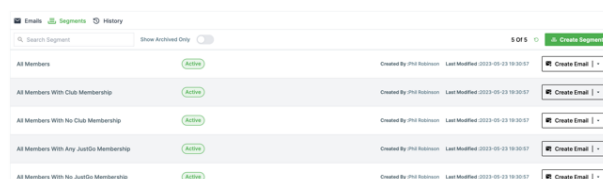


When you are happy with your email, you can click the green “Send” button, or if you want to save it for later, you can click the “Save as Draft” button. You will then see this email in the email list when you go to Club Email next. You can then edit it or send when you are ready to do so.

If you send a test email, any merge fields you use will come through as their merge field rather than the data itself. i.e #FirstName will appear on the test email as “#FirstName” rather than “Christian”. These fields will populate as expected in the actual emails providing they are entered correctly.

## SEGMENTS

You can create a segment based on a variety of different pieces of information held in the profile of your club members. For example members who hold a specific credential or membership.



To review default segments that JustGo have loaded into the system, to review segments you or another Club Administrator has previously created, or to create a new segment, navigate to Segments.

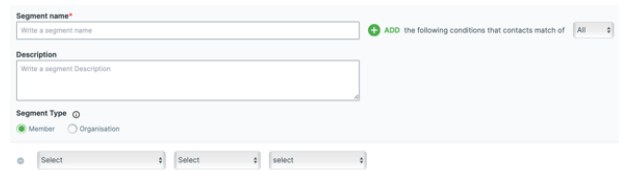
### a) DEFAULT SEGMENTS CREATED BY JUSTGO

There are five pre made segments which represent commonly required email distribution groups. The most commonly required user group will be All Members with Club Membership, as this group contains active financial members of your club.



## b) CREATING NEW SEGMENTS

To create a new segment, click the green Create Segment button.



A new window will launch. Give your segment a name and a description to ensure all users understand the purpose of the distribution group you're creating (For example: "For communications intended only for active financial members of the club."). Use the Select functions to build your segment criteria:

Select Preview to see the users who will appear in your segment. Once the list is correct, select Save.

Instructions on how to create a range of commonly required distribution lists can be found in the appendix at the end of this guide.


## c) EDITING SEGMENTS

While the pre made segments created by can't be edited, any segments created by your club can be edited by anyone assigned the Club Administrator role.

Select the downward arrow next to Create Email on the right side of each segment to launch the options: Preview, Edit, Delete or Archive.

## OPT INS & SETTINGS

Before sending an email, take a moment to review the opt-ins and settings for your audience. This section allows you to acknowledge a member's choice to opt out of receiving e-marketing material, to avoid duplication, to exclude juniors or to add tags.

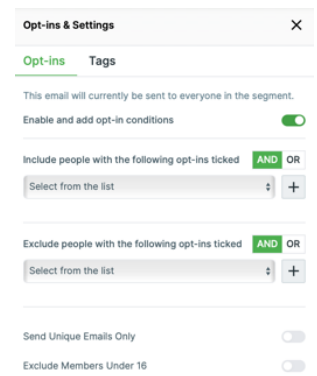
On the bottom of the page there is an Opt-ins & Settings function. Click on this to adjust who your email is sent to. This feature is handy if you are sending bulk emails or wanting to target information to specific groups of users based on their opt-ins. 

### a) OPT-INS

Every user has the option to opt in or out of receiving e-marketing materials. As a rule of thumb, this is any email other than those which are transactional in nature (renewal reminders, booking confirmations, payment receipts, etc).

If a user wishes to stop receiving e-marketing materials from their club, they can do so via the Opt-Ins menu in their profile by unticking the box next to "I wish to receive e-newsletters and offers from my Club".

To acknowledge a user's decision to opt out, select Opt-ins & Settings from the bottom of the Create an Email screen. From the Opt-ins menu, toggle on the switch next to Enable and add opt-in conditions to launch the next option: Include people with the following opt-ins ticked. Select I wish to receive e-newsletters and offers from my club. Click the green Add button to save the condition.

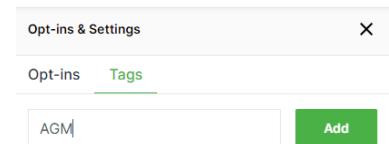


There are two other configurable settings on the Opt-ins menu:

- **Send Unique Emails Only:** Many households use one email address for all family members. Clubs are encouraged to toggle this switch on so that only one copy of the email is sent to that email address.
- **Exclude Members Under 16:** If the contents of your email is not suitable for users within the segment who are under 16 years of age, toggle this switch on to exclude them from the distribution list.

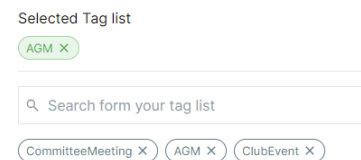
## b) TAGS

Tags are also located under Opt-ins & Settings. Enter the tag you wish to create via the Add a new tag text box, and then click Add.



Creating and using tags allows you to quickly sort and locate previously sent emails.

Tags can be created and used to filter emails. Common reasons for using the tag feature might be to share minutes from committee meetings, to schedule meetings or the club's AGM, to promote club events or fundraisers or to alert members about weather events and paddling conditions.



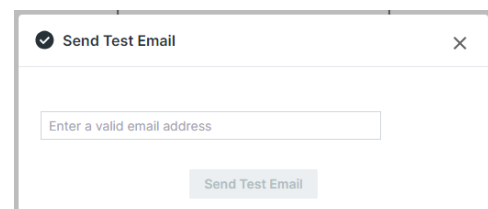
Use the search box to locate existing tags, click on the tag you wish to attach to that email in order to assign it. Once selected, the tag will appear under a new heading, Selected Tag List.

## TEST EMAIL & SEND

After you have set your sending email address (From), selected the relevant segment (Recipients), written your subject line (Subject), drafted your email (in the Email Body), attached any relevant files (Attachments) and configured any relevant settings (Opt-ins & Settings), you may wish to send a test email.

From the options at the bottom right of the Create an Email screen, select Test Email.

A new window will pop-up where you can nominate the receiving email address.

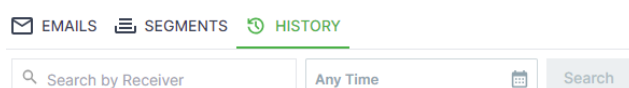


When you receive the test email, any merge tags used (e.g. #FirstName) won't populate with live data, however they will retrieve the correct field when the final email is sent.

## HISTORY

To review emails previously sent by your club, navigate to History from the menu options towards the top of the screen.

To view all emails sent by your club, click Search. To filter the results, enter your parameters in the Search by Recipient field to find emails sent to a specific email address, or make use of the date filter to search for emails sent within a specified period.

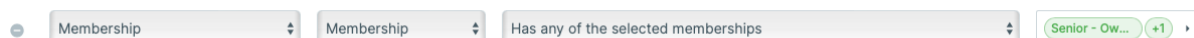


## Appendix: Commonly Required Email Distribution Groups

The examples below represent commonly used distribution groups and explain how to create a segment to email these members:

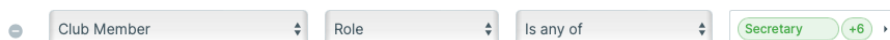
### ACTIVE CLUB MEMBERSHIPS ONLY

To create a segment which includes only members who hold an active club membership, identify the relevant club memberships by name. Note that club memberships should be selected that matches your club memberships.



### CLUB COMMITTEE MEMBERS

To create a segment for members of the club committee, utilise the roles assigned to those members and select those which are relevant to committee members at your club.



### MEMBERS OVER OR UNDER A SPECIFIED AGE

To create a segment for members who are under a specific age, for example under the age of 18, you must set the criteria to capture members between the ages of 1 and 17.



To create a segment for members who are over a specific age, for example 18 years of age or over, you must set the criteria to capture members between the ages of 18 and 99.



### MEMBERS IN THEIR RENEWAL WINDOW

To create a segment for members whose membership has entered the renewal window (i.e. their membership will lapse in the next 30 days), select Membership in the first filter, Membership Renewal in the second and Within renewal period from the third.



### CREATING MORE COMPLEX SEGMENTS

The green button gives you the flexibility to create multiple rules to create more complex email distribution list inclusion rules. Set the drop-down value to *All* if the rules you are creating must all be met in order for a user to qualify for inclusion in the distribution list. Set the value to *Any* if a user must meet at least one of your rules in order to be included in the email distribution, rather than all of them.

### OTHER REQUIREMENTS

If you need to create an email distribution list which isn't explained in this guide and you're unsure how to set the criteria, contact [membership@crnz.org](mailto:membership@crnz.org) for assistance.