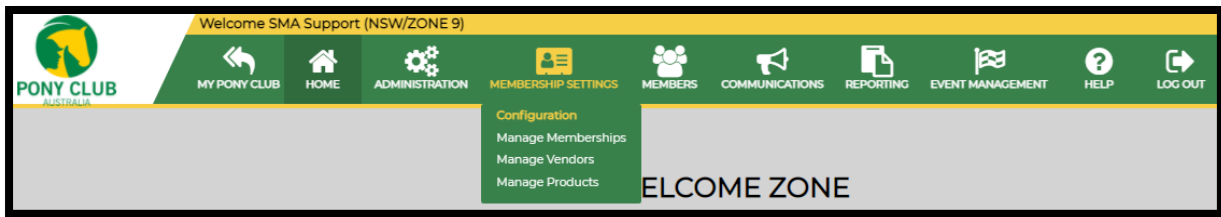


Manage ZONE Memberships 2020

Membership Settings

When you hover over 'Membership Settings' the following sub-tabs appear:



The Membership Setting Menu allows you to Manage Memberships, Manage the product Vendors and Manage the Products sold through the Zone.

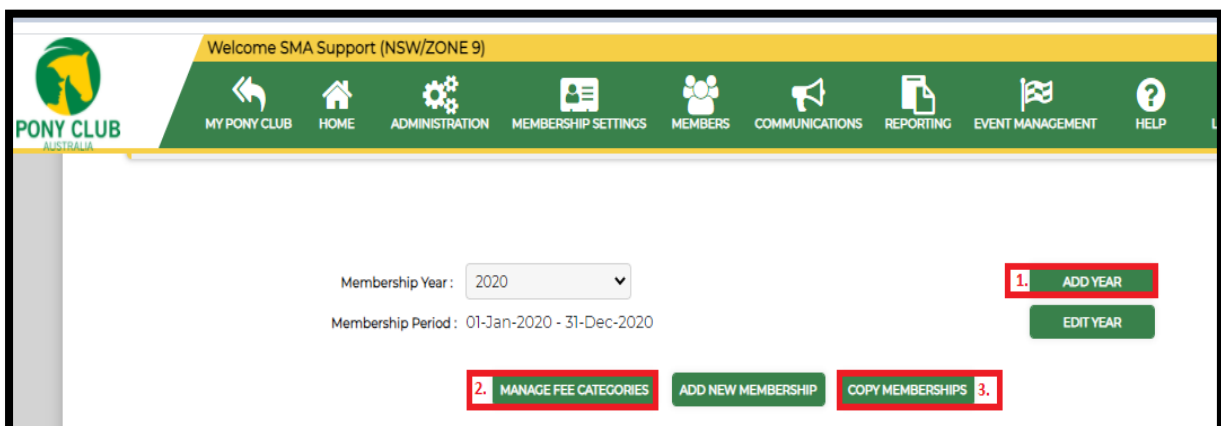
In this guideline we will concentrate on setting up a Membership Year and attach new Memberships only.

Note; Zone is ONLY able to set up a new membership year and new memberships AFTER their SCB has set up theirs!

MANAGE MEMBERSHIPS

Setting up your Zone Membership can be done in few easy steps:

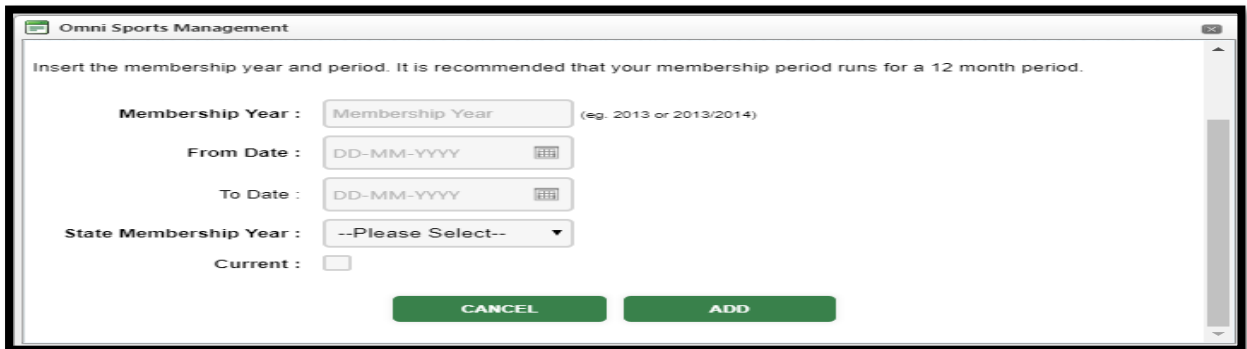
1. **Add Year** (note; do not make the year active yet till set-up is finished)
2. **Manage Fee Categories** > Update/Delete/Add if needed
3. a. **Copy Memberships** > Choose from year > Tick Memberships to be copied > Select new year > Copy
b. Click Update at newly created Membership and check all is entered as it should, do NOT tick <Active> yet
c. Only after **checking**, double checking and triple checking the new membership and 100% certain the memberships are correct;
- tick 2021 as an **ACTIVE** year
- tick ALL 2020 memberships as **INACTIVE**
- tick ALL 2021 memberships as **ACTIVE**.



Manage ZONE Memberships 2020

STEP 1 – SET MEMBERSHIP YEAR

- Select <Add Year>. A pop-up box will appear



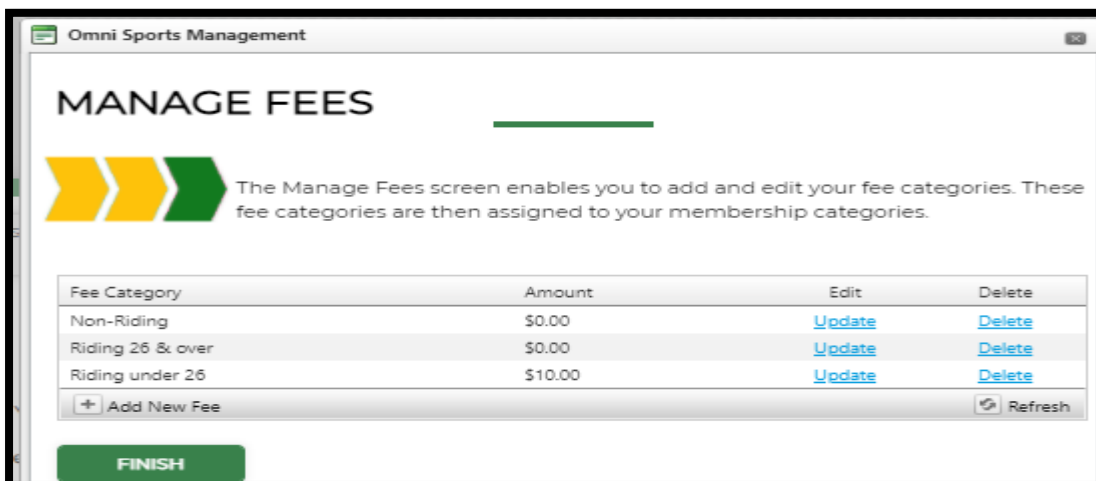
The screenshot shows a window titled 'Omni Sports Management' with the following fields and controls:

- Instruction: "Insert the membership year and period. It is recommended that your membership period runs for a 12 month period."
- Membership Year: Text input field with placeholder "Membership Year" and example "(eg. 2013 or 2013/2014)".
- From Date: Date input field with format "DD-MM-YYYY" and a calendar icon.
- To Date: Date input field with format "DD-MM-YYYY" and a calendar icon.
- State Membership Year: Dropdown menu with "--Please Select--".
- Current: Check box.
- Buttons: "CANCEL" and "ADD".

- Enter your membership year (E.g. 2021); the membership year start and end dates eg. Calendar or Financial Year; then select the appropriate State Membership year from the drop-down box
- It is advised to NOT tick this new year current yet, until the new memberships are all set-up and checked.
- Once Completed, select <Add>
- You will be able to make a year current/not current by choosing the Edit Year button and tick/untick the <Current> box

STEP 2 – MANAGING FEES

You can create as many membership fees as required by your organisation and edit these at any time. To add or edit fees:



The screenshot shows the 'MANAGE FEES' screen with the following content:

- Header: "MANAGE FEES" with a green underline.
- Introductory text: "The Manage Fees screen enables you to add and edit your fee categories. These fee categories are then assigned to your membership categories." accompanied by a graphic of three arrows (two yellow, one green).
- Table of Fee Categories:

Fee Category	Amount	Edit	Delete
Non-Riding	\$0.00	Update	Delete
Riding 26 & over	\$0.00	Update	Delete
Riding under 26	\$10.00	Update	Delete

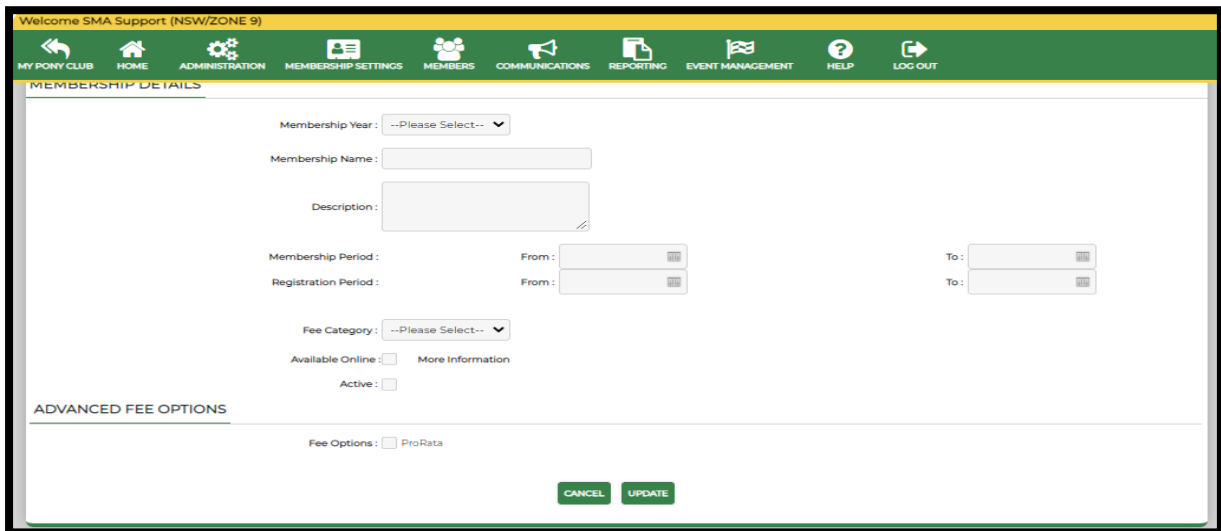
Below the table are buttons for "+ Add New Fee" and "Refresh". At the bottom of the screen is a green "FINISH" button.

- Select <Manage Fee Categories> and click <Add New Fee>
- Under the Fee category heading enter your fee name; under the Amount heading enter the fee price; Select <Update>
- To edit a fee at any time, select <Edit> and make the appropriate changes
- To remove a Fee select <Delete>
- Once you have added/edited all fees select <Finish>

Manage ZONE Memberships 2020

STEP 3 – ADD NEW MEMBERSHIPS

Below the steps to follow when setting up a NEW Membership, memberships already created in previous years can be copied over (see Copy Memberships).



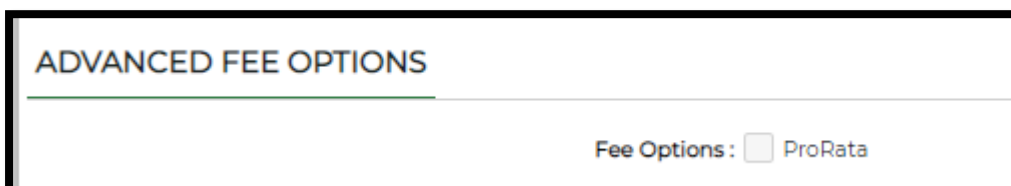
The screenshot shows the 'MEMBERSHIP DETAILS' form in the SMA Support system. The form includes the following fields and options:

- Membership Year: --Please Select-- (dropdown)
- Membership Name: (text input)
- Description: (text area)
- Membership Period: From: (date picker) To: (date picker)
- Registration Period: From: (date picker) To: (date picker)
- Fee Category: --Please Select-- (dropdown)
- Available Online: More Information
- Active:
- ADVANCED FEE OPTIONS: Fee Options: ProRata

Buttons: CANCEL, UPDATE

- Select the Membership Year from the drop-down box
- Enter name, such as Come and Try, Riding, Non-Riding etc. Description gives the clubs information on the membership, such as age range, valid dates or maximum Family Members etc.
- Enter Membership Period (dates this membership will be current) and Registration Period (dates you will accept registrations- this can be different to the Membership Period)
- Select the fee that is charged for this membership (see the Managing Fees section above)
- **Do NOT tick <available online> UNLESS this membership is meant to be a Direct Affiliate to the Zone**
- Only tick the ACTIVE box after ALL Zone memberships are set-up and after triple check their accuracy

ADVANCED FEE/PRO RATA OPTION



The screenshot shows the 'ADVANCED FEE OPTIONS' section of the form. It includes the following text and option:

ADVANCED FEE OPTIONS

Fee Options: ProRata

While within the Membership set-up you will have the option to offer Pro-Rata fees.

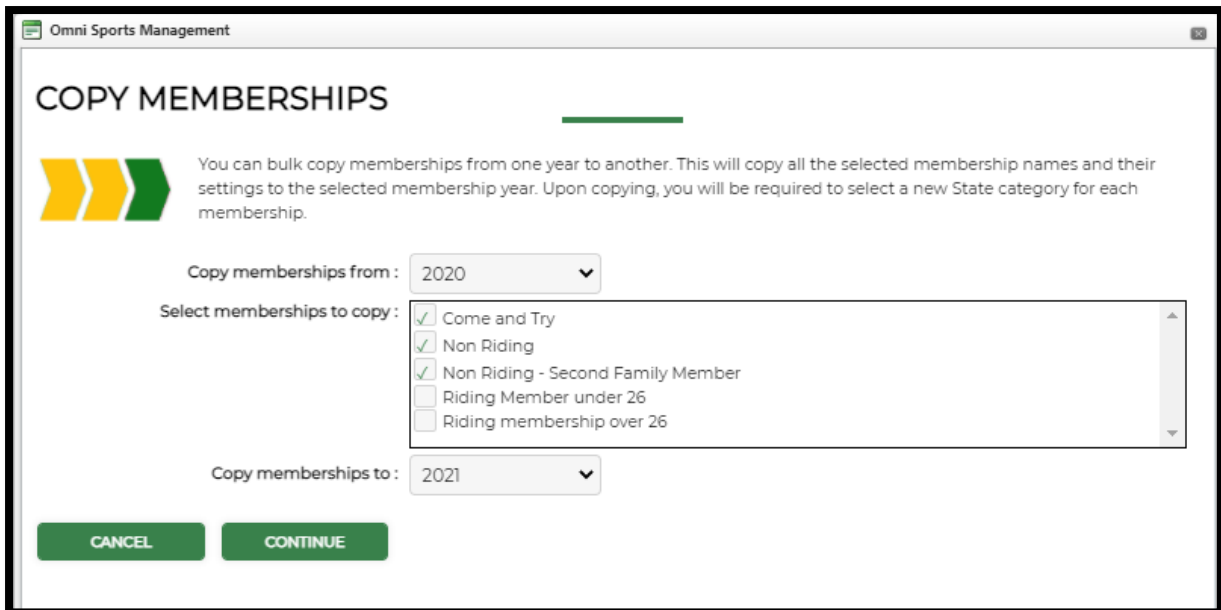
- If you are offering Pro-Rata fees for memberships tick the 'Fee Option ProRata' box
- Ticking this box will allow you to fill in the fee structure per month. Please keep in mind when you fill in the Fees, you are referring to the ZONE Fee part of the Total Fee. Starting with the Full Fee at 12mth and working down from there. How this ProRata Fee Structure looks like is decided by your Zone.
- Click <Update> once certain

Once the membership is completed by clicking <Update>, it will be added to the Membership list.

Manage ZONE Memberships 2020

COPY MEMBERSHIPS

At the start of your new membership year you can cut down on administration time by copying the previous year's memberships to the new membership year by selecting '**Copy Memberships**'.



Omni Sports Management

COPY MEMBERSHIPS

You can bulk copy memberships from one year to another. This will copy all the selected membership names and their settings to the selected membership year. Upon copying, you will be required to select a new State category for each membership.

Copy memberships from: 2020

Select memberships to copy:

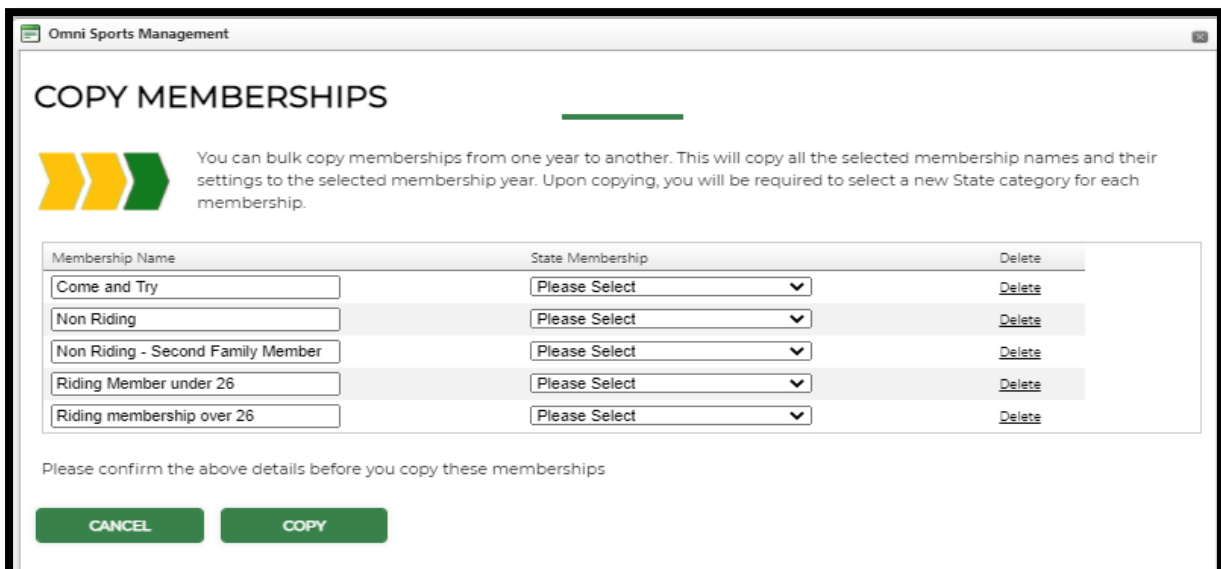
- Come and Try
- Non Riding
- Non Riding - Second Family Member
- Riding Member under 26
- Riding membership over 26

Copy memberships to: 2021

CANCEL **CONTINUE**

- Click <Copy Memberships> A pop-up box will appear.
- Select the year you would like to copy memberships from eg. 2020
- Tick the membership(s) you would like to copy by putting a tick in the box next to it
- Select the membership year you would like to copy membership to eg. 2021
- Select <Continue>

A new pop-up box will appear;



Omni Sports Management

COPY MEMBERSHIPS

You can bulk copy memberships from one year to another. This will copy all the selected membership names and their settings to the selected membership year. Upon copying, you will be required to select a new State category for each membership.

Membership Name	State Membership	Delete
<input type="text" value="Come and Try"/>	<input type="text" value="Please Select"/>	Delete
<input type="text" value="Non Riding"/>	<input type="text" value="Please Select"/>	Delete
<input type="text" value="Non Riding - Second Family Member"/>	<input type="text" value="Please Select"/>	Delete
<input type="text" value="Riding Member under 26"/>	<input type="text" value="Please Select"/>	Delete
<input type="text" value="Riding membership over 26"/>	<input type="text" value="Please Select"/>	Delete

Please confirm the above details before you copy these memberships

CANCEL **COPY**

- If required you can edit the name of the membership(s) in the left field
- Select the State Membership that should be attached to that Club Membership
- Select <Copy>. You will be shown the Manage Memberships Screen

Manage ZONE Memberships 2020

CHECK ALL MEMBERSHIPS ARE SET-UP CORRECTLY BY SELECTING <UPDATE> AT THE MEMBERSHIP NAME.

The screenshot shows a form for managing a membership. The 'Membership Name' is 'Come and Try'. The 'Description' field is empty. The 'Membership Period' is set from '01-Jan-2021' to '31-Dec-2021'. The 'Registration Period' is also from '01-Jan-2021' to '31-Dec-2021'. The 'State Membership' is 'Come and Try' with a 'Current Fee' of '\$25.00'. The 'National Membership' is 'Come & Try' with a 'Current Fee' of '\$0.00'. The 'Fee Category' is 'Non-Riding' with a 'Current Fee' of '\$0.00'. The 'Current Total Fee' is '\$25.00'. There are checkboxes for 'Available Online' (unchecked) and 'Active' (checked). There are also links for 'View my online registration screen' and 'More Information'.

- Please check accuracy of the Membership **Period** dates and the Membership **Registration** dates, change if needed
- Check if the correct State Membership is attached and the right Fee Category is applied
- **Do NOT** tick <available online> **UNLESS** this membership is meant to be a **Direct Affiliate to the Zone**
- Only tick the **ACTIVE** box after ALL Zone memberships are set-up and after triple check their accuracy

After the memberships are fully set-up it is advised to have another pair of eyes checking these. Once positive all is set-up correctly, navigate to the **RED** <INACTIVE> button behind the membership and click on it so it becomes a **BLUE** <Active> button.

MEMBERSHIP NAME	BEGIN DATE	END DATE	NATIONAL FEE AMOUNT PRO RATA	STATE FEE AMOUNT PRO RATA	ZONE FEE AMOUNT PRO RATA	ONLINE	ACTIVE	UPDATE
Come and Try	01-Jan-2021	31-Dec-2021	\$0.00 No	\$25.00 No	\$0.00 No	No	ACTIVE	UPDATE
Non Riding	01-Jan-2021	31-Dec-2021	\$0.00 No	\$40.00 No	\$0.00 No	Yes	ACTIVE	UPDATE
Non Riding - Second Family Member	01-Jan-2021	31-Dec-2021	\$0.00 No	\$20.00 No	\$0.00 No	Yes	ACTIVE	UPDATE
Riding Member under 26	01-Jan-2021	31-Dec-2021	\$15.13 No	\$61.37 No	\$10.00 No	Yes	ACTIVE	UPDATE
Riding membership over 26	01-Jan-2021	31-Dec-2021	\$15.13 No	\$61.37 No	\$0.00 No	Yes	ACTIVE	UPDATE

NOTE: Once a Member joins a Membership you will no longer be able to change the Membership Begin and End dates, the Financial Year, State Membership your membership is connected to or the Membership Name.

For further assistance please contact your State Organisation via;

Pony Club Australia & State Association Contacts	
<p>Pony Club Australia (03) 9596 5390 info@ponyclubaustralia.com.au</p>	<p>Pony Club Association NSW (02) 4229 8977 admin@pcansw.org.au</p>
<p>Pony Club QLD (07) 3216 1255 admin@pcaq.asn.au</p>	<p>Pony Club VIC (03) 8685 8925 membership@ponyclubvic.org.au</p>
<p>Pony Club TAS (03) 6431 6913 sdekaste@bigpond.com</p>	<p>Pony Club WA (08) 9296 1500 membership@ponyclubwa.asn.au</p>
<p>Pony Club NT (04) 3436 0549 admin@pcant.org.au</p>	<p>Pony Club SA (08) 7225 1805 ponyclubsa@gmail.com</p>