

How do I complete membership renewals in Swim Central?

This help file is designed to take club administrators through the membership renewal process in Swim Central. There is a training video which has been designed as a companion resource and we highly recommend that you watch the video, read this help file and then complete the membership renewal process. Please keep in mind if you do require further assistance you can contact our office directly by email (admin.qld@swimming.org.au) or phone (07 3390 2011).

The membership renewal process is completed in Swim Central through setting up and selling membership products. This means, each season clubs will create membership products for the different memberships they will be offering (e.g. Competitive Swimmer 9&O, Recreational Swimmer 9&O, Swimmer 8&U, Coach, Parent etc.). Clubs will publish these products in their Product Catalogue, which will allow their existing members and potential members to shop for and purchase relevant membership products to renew or join their club.

STEP 1. DETERMINE THE MEMBERSHIP PRODUCT FEES FOR YOUR CLUB

We have developed an excel spreadsheet for clubs to use to assist them with determining their fees. This spreadsheet will allow your Club to enter your fee, and then see what the total payable amount will be for your members including the region fee, Swimming Queensland's fee and Swimming Australia's fee – plus it will calculate the System Fee and the Transaction Fee which will apply. You can access this excel spreadsheet here: [1920 Club Fee and Discount Help File](#)

STEP 2. CREATE YOUR MEMBERSHIP PRODUCTS IN SWIM CENTRAL

Your Club now needs to create each membership product in Swim Central. Follow these steps to create each membership product in turn.

- Sign in to Swim Central and navigate to your Entity Home Screen
You will need to enter your Family Administration Pin (if app.) and then select the blue Entity Management tile, entering your Entity Pin and then selecting your entity.
- From your Entity Home screen, select the Products tile, then select the Product + button
 - Product Type = This is the type of product you are creating, choose "Membership" from the drop down list
 - Product Name = Enter an appropriate name for your membership product
We encourage clubs to include the season for clarity in future steps (e.g. 19/20 Competitive Swimmer 9&O, 19/20 Swimmer 8&U, 19/20 Parent, 19/20 Coach etc.)
 - Refund Allowed = Toggle ON the refund allowed field
This will allow refunds to be requested and processed within Swim Central for this product.
 - Component Only = Ensure the Component Only field is toggled OFF
Only region and above membership products will be component only
 - The Payment section is not editable by clubs, select next and then save
- Complete all details within the Product Edit screen
 - Description = Allows your Club to enter a description of your membership product, which will show in the product catalogue
This is not mandatory but we have found it to be helpful.
 - Product Name = This field is prepopulated from data already entered
 - Product Short Name = The name which will show on a member's Membership Card within their My Memberships
We suggest clubs use the Product Name (e.g. 19/20 Competitive Swimmer 9&O)
 - Hard Start Date = The date your product will be valid from – 01/07/2019
 - Hard Expiry Date = The date your product will be valid to – 30/06/2020

- Cost Price exGST = The price of your Club's membership product, excluding GST and not including SAL, SQ or region fees
- Margin on Cost = Allows your Club to add a margin on top of the cost price; the margin can be a dollar amount or a percentage
- GST Payable = Ensure this is toggled appropriately for your Club
- Minimum Eligible Age = A constraint which needs to be set for any membership product which is restricted to members over a certain age (e.g. Competitive Swimmer 9&O membership product would require a Minimum Eligible Age of 9)
- Maximum Eligible Age = A constraint which needs to be set for any membership product which is restricted to members under a certain age (e.g. Swimmer 8&U membership product would require a Maximum Eligible Age of 8)
- Ensure you check all fields and then select save
- Link your membership product to the correct region membership component
 - This step ensures that your Members can access the benefits and privileges due to that membership product.*
 - From the Product Home screen, select the Comps. tab on the right
 - Select the Component + button
 - Select from the list, the component from your Region that links to this membership product
 - View information about the component on the right, confirming it is correct
 - Select the blue next button at the bottom of the list, then confirm
 - Your membership product is now linked to the region, state and national components in one-step

Extra optional product features

- Reqs. = Allows your Club to set certain document or accreditation requirements before a participant can purchase the product. If your Club restricts membership, (e.g. some school-based clubs have a requirement that you attend the school in order to be a member of the club) a document requirement can be used to achieve this. Please don't hesitate to contact us for help setting this up. Another example is that the Accredited Technical Official membership will have an accreditation requirement; this will be set at state level and doesn't need to be duplicated at club level.
- Docs. = Allows you to provide a certain document to every purchaser of this membership product (e.g. you could add a club handbook here and this would be placed in the document library of each member who purchases the membership product). A great benefit of this is that any document provided in this way is able to be updated for everyone, at the same time through the product, making sure it is always up to date.
- Discs. = Allows you to set an "early bird" or "late joiner" discount (amount or percentage) based on dates (e.g. you could set that an x% or \$x discount to apply within a certain date range). This discount will only apply to your Club's membership product amount (and not any components from region, state or national).

STEP 3. REPLACE LAST SEASON'S MEMBERSHIP PRODUCTS

Each season, clubs will set their newly created membership products as replacements to their old membership products. Once a replacement membership product has been set and the old membership product is within 30 days of expiring or has expired, the system will automatically place that new membership product in the family group founder's shopping trolley. At this point, a notification via email and via internal messaging in Swim Central will be sent to the family group founder advising them of the expiring membership product and the replacement membership product that has been placed in the family group founder's shopping trolley. A further notification will be sent 2 weeks later and a final notification 2 weeks after that. However, if in the meantime they purchase a new membership product, the notifications will not be sent.

Follow these steps to complete the replacement process for each membership product.

- From your Entity Home, select the Products tile
- Select each product from last season in turn
 - Within each product's Product Home screen, select the Replacement button
 - On the right hand side select from the list, the relevant new season membership product (this is where it is extra handy to ensure you have clearly named your membership products including the season)
 - The selected membership product will be populated on the left, then select next and save
 - Repeat this for each membership product from last season. In the case of the 7 years and under membership product and the 8-year-old membership product from the 18/19 season, these will both be replaced by the Swimmer 8&U membership product.

STEP 4. SET ANY VOLUME DISCOUNTS REQUIRED

Once you have created each of your new membership products and replaced each of your old membership products you can now set any volume discounts (or multi purchase) discounts. Swim Central allows clubs to offer discounts for purchases of multiple paying membership products at the same time and it calls these Volume Discounts. This process is much simpler, compared to the previous system. However, clubs are not required to offer discounts. Swimming Queensland does offer Volume Discounts and you can find out all the details in the excel spreadsheet resource we have developed which is designed to help clubs set volume discounts. If your Club does want to offer Volume Discounts, we suggest that you use this excel spreadsheet to help you decide on an appropriate discount. Access the spreadsheet here: [1920 Club Fee and Discount Help File](#)

Follow the steps below to setup Volume Discounts in Swim Central.

- Decide on the discount percentage you will offer (see above spreadsheet)
Keep in mind this is for a certain number of membership products purchased at the same time (e.g. if a parent has Y number of paying membership products (any combination) in their shopping trolley they will received an X% discount for each of the Club's membership products in the shopping trolley).
- From your Entity Home, select the Discounts tile
- Select the Discount + button, and enter required information
 - Quantity Breakpoint = The number of membership products this discount will apply to (e.g. if you enter 3 here, it will apply this discount to any shopping trolley with 3 x paying membership products from your Club)
 - Discount Percentage = The percentage discount that will be applied to your Club's membership product amount (not any included components) if the shopping trolley has the specified amount
- Select next and save

STEP 5. MAKE YOUR MEMBERSHIP PRODUCTS AVAILABLE

Once you completed the above steps for each of your membership products you can publish them in your Product Catalogue.

You complete this step in each product, from your Products tile.

- From the product home screen, select the Availability button
- Enter the first date that someone can purchase this membership product (e.g. today's date)
- Enter the last date that someone could purchase this membership product (30/06/2020)
- Toggle ON the Show in Catalogue field if you want this membership product to show in your Product Catalogue

You may wish to leave that toggled off in certain circumstances (e.g. a Life Member membership product would not be something that the member would select but something the club would provide to them and therefore you would not publish it in your catalogue). Please don't hesitate to get in touch if you need further information regarding this.

STEP 6. UPDATE YOUR CLUB'S TERMS

Clubs also need to ensure their terms have also been updated for the season. These will need to be agreed to by anyone purchasing a product from your Club. You can update your Club's terms using the Legal Terms tile from your Entity Home screen.

EXTRA INFORMATION

There are a few extra things we wanted to let you know about as they differ from the past.

- **Pending** - Members still have until 30 September to renew their membership (as in previous season's)
- **Lapsing** - Any previous member who does not renew their membership before 30 October (30 days after their membership product has expired) will disappear from your Club's member list. If they do choose to join your Club again, they simply need to sign in to Swim Central and purchase the appropriate membership product. This removes the need to Lapse a member not returning.
- **Reinstating** - Old members, who don't have an active membership product, don't need to be re-instated or transferred anymore. They simply sign in using the forgot password process (or register) with Swim Central and purchase the appropriate membership product. If they are a swimmer who needs old results, simply contact us and we can have them linked.
- **Upgrading or transferring memberships** – If a member wants to upgrade or transfer during the season they simply purchase the new membership product and complete the transfer process from the old product to the new product. We have a help file specific to this process which you can access [from our website](#). If your Club doesn't want to charge these members the club component of the new membership product, your Club can setup a different membership product for this purpose. If your Club would like to set this up please contact us in the office for help.

YOUR PRODUCT CATALOGUE

Your membership products will now be available for purchase in your Club's Product Catalogue. An existing member can renew or a new member can join by signing in to Swim Central and using their Shopping tile.

Remember to remind parents that they need to ensure they are impersonating the correct member of their family when purchasing membership products.

They will follow these steps.

- Sign in to Swim Central, unlock their Family Administration Pin
- Select the relevant family member
If they don't enter their pin at this point they will need to before they can add anything to their trolley.
- From the relevant family member's Home screen, they will select the Shopping tile
- Then search for their club, selecting the appropriate membership product
- Confirm the details on the right and then Add to Trolley
Parents can end impersonation and select another family member as many times as they need to add all membership products to their trolley before completing the purchases all at once.
- A confirmation email will be sent once the payment has been processed and if for some reason they don't complete the purchase at that time the products in their shopping trolley will be placed in their My Purchases tile as Pending Payment, which can be completed or cancelled in the future from the parent's My Purchase tile.

We hope this resource has assisted you with completing the Membership Renewal process in Swim Central. Please use this resource along with the membership renewals training video. Though please remember we're here to help, so if you do need further assistance please contact our office via email (admin.qld@swimming.org.au) or phone (07 3390 2011).