

3rd July 2012

The Clubhouse – Latest Updates

Since the last document on 6th February 2012, The Clubhouse now contains the following new features and modifications:

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Club Events

Online Payments for Club Events

Our top new feature! The Clubhouse will now accept Online Payments for Club Events. Club administrators will now be able to set this up in **General Club Settings** to specify which payment methods are accepted for club events. In addition, the cost and accepted payment methods will need to be specified for each event in the **Event Editor**. Similar to subscriptions, administrators will have the opportunity to adjust the cost for individuals prior to sending out an invoice.

How to:-

From the Main Menu select **Edit General Club Settings** from the Club Administration panel. Click Other Settings to jump to the bottom of the form. Select the payment options you want next to Accepted Event Payment Methods. To use them, these payment methods must also be set up correctly under Subscription Details > Accepted Subscription Payment Methods.

From the Main Menu select **Event Manager** from the Club Officers (staff/officials) panel. Select an event to which you wish to add Costs, or click *Add* to add a new Event. From Manage Event, click Edit Event Details to reach the **Event Editor**. Scroll down to Costs and check *There is a charge for this event*; the Cost options will appear. The options are enabled according to which payment methods are enabled in General Club Settings and also whether the event is a one-off or recurrent and if signing up is allowed for the whole series or individual instances. You may specify a deposit cost and also a surcharge for paying online.

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Event Confirmation Emails

Confirmation emails for signing up and removal for club events will be far more specific. Each individual who has been signed up, modified or deleted from an event attendee list will receive an email specific to his/her own situation. The event organizers will receive a summary email, if requested, detailing exactly which attendees have been added or removed, and by whom. Those signing up on behalf of others will also receive a summary email confirming their actions.

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Event Invoice Emails

Similar to how subscriptions are handled. The event organizer may send out an invoice to each event attendee. If he/she specifies that approval is *not* required, the email will be sent out automatically on sign up. Once the email has been sent, an attendee may pay online for himself and also anyone he has signed up on behalf of.

How to:-

From the Main Menu select **Event Manager** from the Club Officers (staff/officials) panel. Select the event you wish to invoice by clicking *Manage*. From Manage Event, click View Attendee List / Manage Payments to reach the **Event Attendee Management** page. This table is similar to Subscription Management in that you can adjust the costs for each individual and also sent out invoices by email. You can use this table to record how much of the balance has been paid by each attendee. For each payment recorded, an order will be created. You can also send an email receipt to attendees using the Latest Payment Acknowledged column. Once the Amount Paid recorded is equal to the Total Cost, the attendee will be marked as Paid in Full. These processes are carried out automatically for those that pay online by adding the event to their online basket and checking out via PayPal or Google Wallet. Please note, for clubs that pay sales tax, all costs and payments recorded should exclude tax.

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Orders for Subscription and Event Payments

From now onwards, all payments for Subscriptions and Events will result in the creation of an "Order", regardless of the payment method. This is different to how subscriptions previously worked where Orders were only created for subscriptions paid online via PayPal or Google Wallet. Each Order can be marked as Paid or Unpaid and, if paid, there will be a corresponding Payment in the Payments table.

How to:-

When a member of staff or club official marks a subscription or event attendee as Paid, the order and corresponding payment are created automatically. If the member pays online, the order is created automatically and once payment has been verified by PayPal or Google, the corresponding Payment will be created. Orders can be viewed by administrators by clicking Order Management in the Club Administration panel. Pending orders (awaiting verification from PayPal or Google) can normally be cancelled if necessary.

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International Tax Settings

This new feature allows club administrators across the world to set the appropriate name for their sales tax e.g. "VAT" (UK) or "HST" (Canada).

Clients not registered for tax will also notice that tax is no longer mentioned throughout the site when you select "Not Registered".

How to:-

To set up your club's tax profile, administrators should navigate to Edit General Club Settings > Sales Tax.

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Family Group and Address Matching Improvements

With The Clubhouse it's now easier than ever to add a new member from an existing family group or household. You'll find useful links throughout the site to "Create New Member for this Family Group". Additionally, when creating any new member, The Clubhouse will match partial addresses to those already in the database, allowing you to select the correct address and join the related family group.

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Create New Member for Family Group

We have added links to “Create New Member for Family Group” in the following various places we hope you will find intuitive:

1. Club Administration Panel > Edit Member Details > Select and Edit Member > Administration Menu for: A.N. Other
 - a. Under Member Personal Details click “Create New Member for this Family Group”
 - b. Under Other Tasks click “Create New Member for this Family Group”
 - c. Under Member Personal Details click “Parents & Family Group” > “Create New Member for this Family Group” *
2. Administration Menu for: A.N. Other can also be reached from the Member Directory by clicking the “Admin” link for a member.
3. Club Administration Panel > Edit Family Groups > Family Group Manager
 - a. Click “Create New” against any family group in the list.
 - b. Click “Edit” against any family group in the list > Family Group Selector > Click “Create New Member for this Family Group” above list of members
4. Family Group Manager can also be reached from Parents & Family Group (*) above.

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Add New Member

We have greatly enhanced our address matching engine for new registrations and existing address updates. When a new person registers at your club, whether they do it themselves, via a logged in family member or are added by an administrator, the address details they enter will be cross-referenced with existing addresses on your database. If their address, or partial address, matches any already in the database they will have the option to select it. This in turn reduces address duplication and allows them to join an existing family group.

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General Improvements to User Experience

We have made many other changes, too numerous to list by email, primarily with the aim of making the site easier to use.

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