sportlomo
sports manager

Membership Payments Manual

Revision 2, November 2017

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Contents

1.0 Introduction

In this manual you will be taken through the steps in setting up your club account to take membership payments.

FOR THE PURPOSE OF THIS MANUAL "Ontario Rugby Aurora Barbarians" WILL BE USED

➢ Using this link, Log in to Sportlomo as a Club Administrator by entering your username and password – https://sportsmanager.ie/maint.php

➢ You will be brought to the Sportlomo Administration panel (dashboard). Now click '**Membership'** which will take you to the Membership screen.
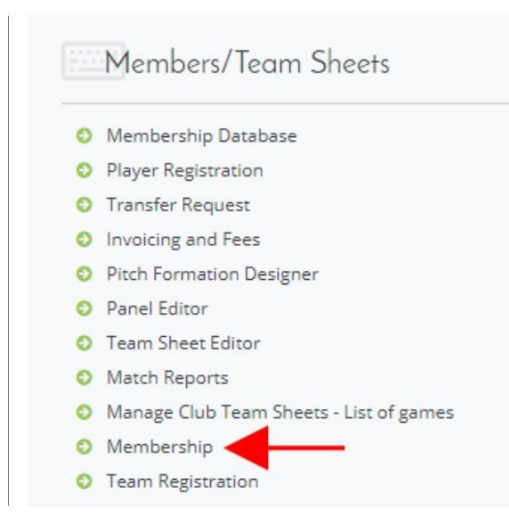
2.0 Membership Setup

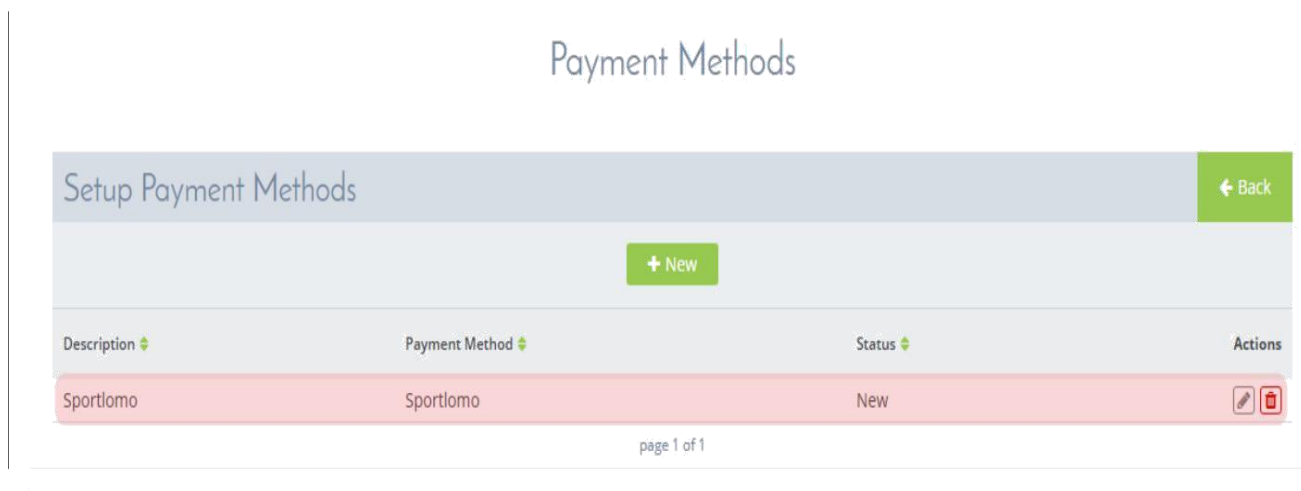To begin click on '**Payment Methods**'.
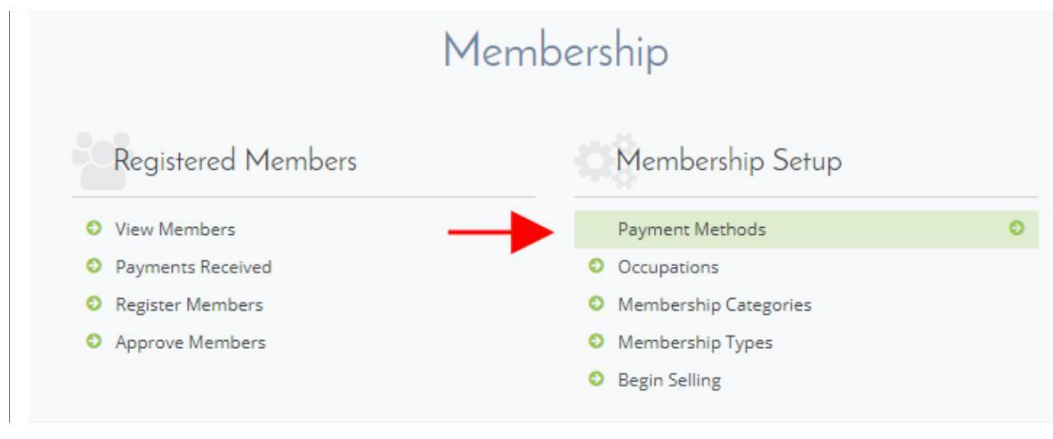
Payment Methods

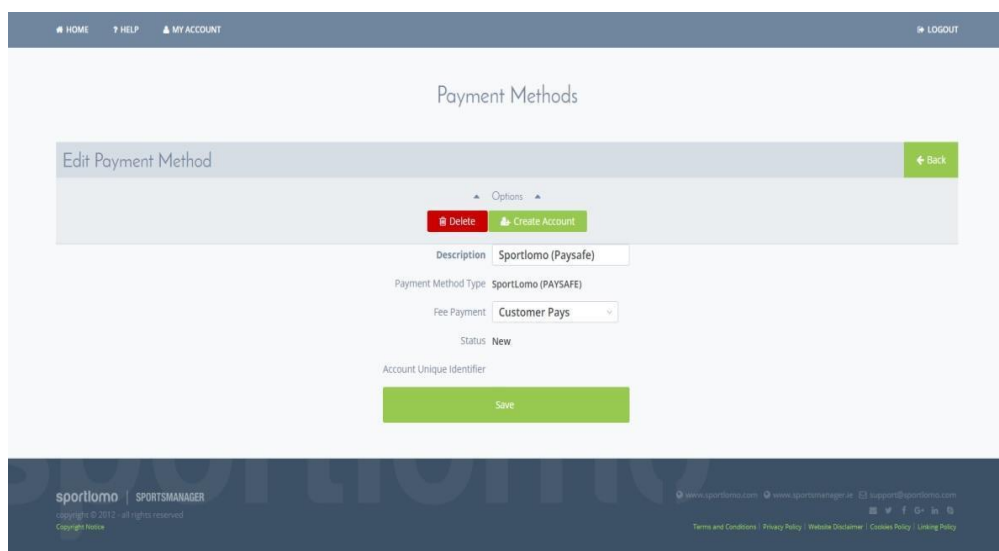To accept online payments, you will start by activating your SportLoMo payment option.

This will require you to enter some information about your club, and about the person authorised to manage payments for your club.

Remember at no point does SportLoMo or the club see or store any credit card details.

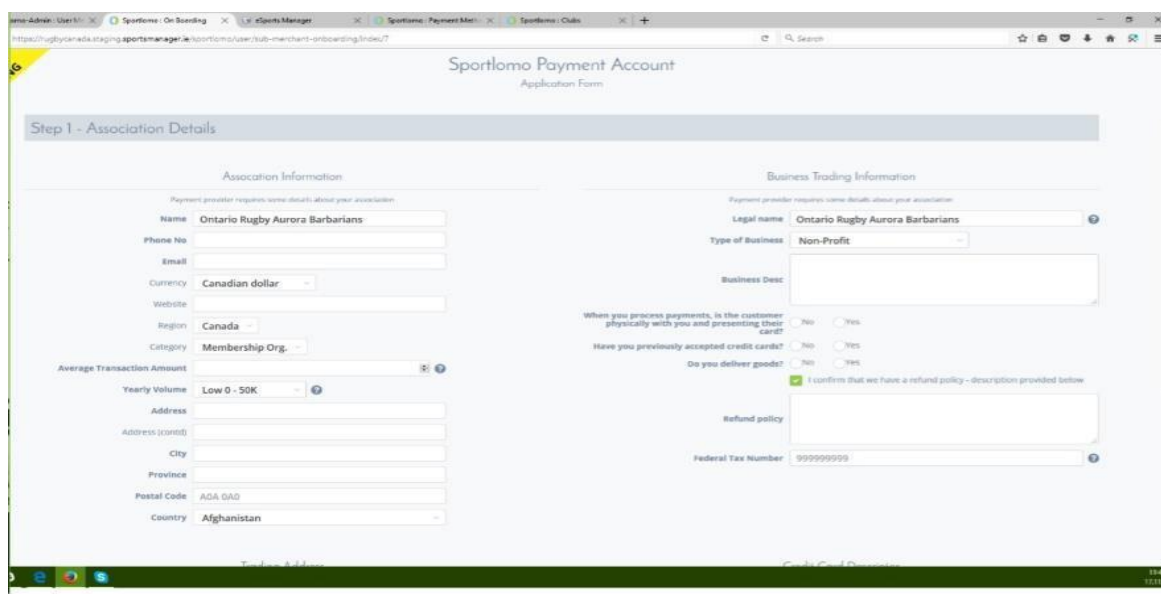**Step 1** - To start click the '**Edit icon' (Pen and Paper icon on left side under "Actions".**

- As you can see our Status is **NEW**. In this instance, our Payment Provider is PAYSAFE. SportLoMo has partnered with this provider to ensure no bank details will be stored in the SportLoMo platform. This payment service is provided by a specialist payment provider.

- We now create an account to start accepting payments for memberships. Click '**create account'** under the heading 'options'.

Step 2

- Fill in all fields required here, this information is needed for the payment provider.
  Some categories are required and some not required.

- Fields here are for Association information as well as business trading information. This should be filled in by your Club's Signing Officer – Authorized User

- When complete click "Submit"

Step 3 –

- Next we fill out the "Sportlomo Payment Account Application form" Firstly you fill the fields to create a user account to login to the PAYSAFE system.

- When you complete these fields move on to the "Details" section underneath, this is some personal information needed by PAYSAFE belong to the individual authorized to manage this account, you will also be asked for the account details of the bank account attached to the club.

Step 4-

- You must now accept terms and conditions to your merchant account as seen in screenshot below, tick box and click "Submit

- Upon the creation of your merchant account with Sportlomo/Paysafe, we deposit a small 8

- Validation Amount between $0.01 and $0.99 in the bank account entered during the application process. In order to verify the banking information through the Paysafe Back Office, take note of this amount.

- Then, login to your Sportlomo account with your user name and password, go to "Membership" and then click on "Payment Methods" where you will see "Verify Bank Account".

- Once completed, your funds will be released on the next scheduled payment date.

Important!

- ▢ In certain instances, the micro deposit and/or the verification amount does not get posted to the bank account given during the application process. When this occurs, Paysafe must verify the banking information manually. In order to complete this process please send one of the following in response to this email to salessupport@paysafe.com:

- A voided cheque with the full legal name of your company printed on it. Please note that the legal name cannot be hand written on the cheque. A picture of your void check is acceptable.

- A bank letter indicating the full company legal name and banking information. This letter must be typed on official bank letterhead and must be signed and stamped by a bank official.

- Once Paysafe receives the voided check or bank letter, this information will be verified within 24-48 hours and the funds will be released on the next scheduled payment date.

Step 5-

Following Approval

- You will receive an approval email welcoming you to Sportlomo as seen in screenshot below.
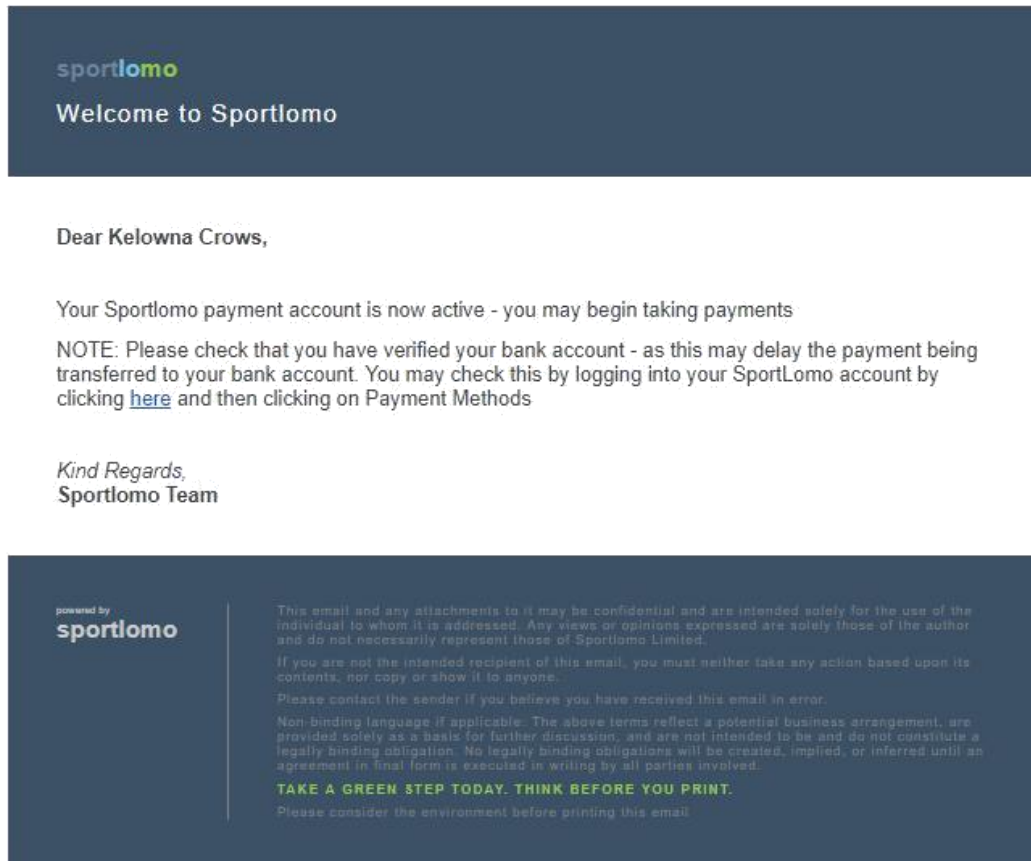
3.0 Setup your Club Membership Types

This section allows us to name "Types" of members that can existing in your club. For example, you may have an "Under 16" membership type, an "Under 14" Membership type or an "Adult" Membership type.

These types will be attached / linked to a higher-level Membership "Category". For Example, U16 and U14 membership Types may both be grouped under a category called "Minor". The Categories will be defined by your Provincial body and your National Sports Body. Giving the club the ability to create different "Types" allows the club more flexibility to sub-divide and classify its membership.

When you create a membership Type, you can also define what information you want to collect for this specific member Type. You are in effect creating the form they will complete when they register. You can also specify if each field on the form is "optional" or "required".

e.g. you may stipulate that DOB is a required field for underage players but optional for Adult players. You may have an optional field for work phone number for an adult player etc.

To create Membership Types:

1. Go back to the main Membership Page and click '**Membership types'**
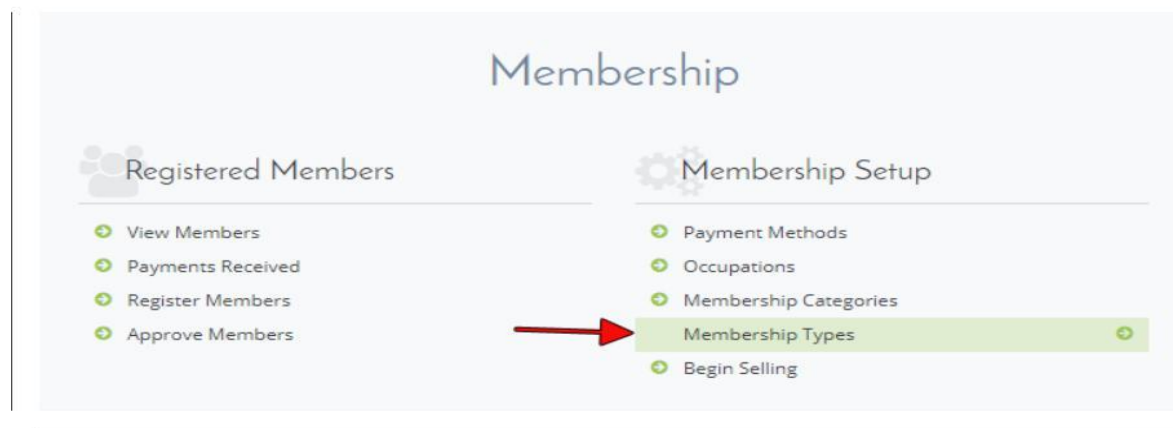
2. *Click NEW*
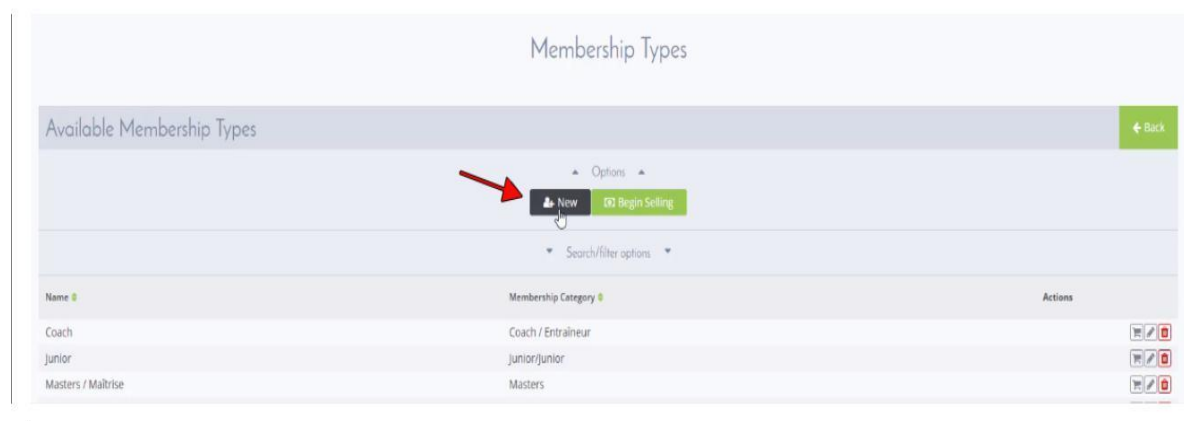
3.   Add a name for the membership you wish to create. i.e. Adult, U16, U14 etc.

4.   On the membership category field click on the dropdown arrow and select which category this membership falls under. These categories will be set by your parent organisation. (E.g. Add U14 to the "Minor" category etc)

5.   Set a date of birth range if required. This step allows you to specify the minimum age a player must be or the Maximum age a player must be to register to this membership Type. **This is an optional setting**.

6.   Click SAVE

Member Details

You can now decide what information is required from a potential member as they sign up. **Each item is called a 'Field'. (***example: Player number, Passport number).*

     You can….

- o   Make the field **visible** or **hidden**

- o   Make the field required (member must fill it in).

- o   Change the **description** that will appear on the registration form

- o   You can move the order of the fields up and down with the arrows on the right. This determines the order / sequence of each field on the form.

The first four fields have to be visible and are required. These are already set by SportLoMo.

When finished click SAVE

We have now set up a new Membership Types.

You have the option to "Edit" this form at any time.

	Member Details			
Field Name	Visible	Required	Description	Move
First Name	Yes	Yes	First Name	▲ ▼
Last Name	Yes	Yes	Last Name	▲ ▼
E-mail	Yes	Yes	E-mail	▲ ▼
DOB	Yes	Yes	DOB	▲ ▼
Gender	No	No	Gender	
Photo	No	No	Photo	
General Attachment	No	No	General Attachment	
Signature	No	No	Signature	
ID Copy	No	No	ID Copy	
Parent Waiver Form	No	No	Parent Waiver Form	
Membership ID	No	No	Membership ID	
PPN	No	No	PPN	
Player No	No	No	Player No	
Custom Identifier 3	No	No	Custom Identifier 3	
custom no 4	No	No	custom no 4	
custom no 5	No	No	custom no 5	
Passport Number	No	No	Passport Number	

4.0. Begin Selling

You are now ready to make your membership available for Sale to the public. This step allows you to give different memberships a 'public' name (visible to the general public on your website), assign a price, and set dates to offer/close a membership offer.

1.   Click 'Begin Selling'.
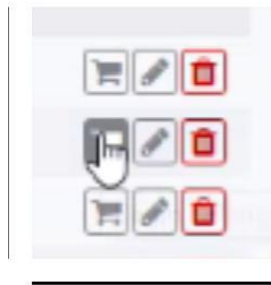
2.   Give the membership a name*

          AND REMEMBER THIS IS THE NAME A USER WILL SEE WHEN PURCHASING

3.   You can also give a description or leave it blank.

4.   Enter the season for the membership you are selling.

5.   Optional: Choose to make a particular membership '**feature**' or '**stand out**' on the public main membership registration page by ticking '**Featured**' tick box.

6.   You can set the dates the membership is effective from and to. This is Used if you wish to have a membership available for sale for a certain period of time such as a special offer or early bird. Once the date expires, the membership will automatically be removed from sale

7.   You can also sell your Memberships in Packages (i.e. Family), Just add multiple membership types to the category you are offering for sale.

8.   Then enter the price you plan to sell this membership at.

9.   The Fees charged to the member will include the fees assigned to the Category by the Province and by the National Governing Body. The Club Fees are added to these fees.

10.   You can also choose the final selling price, and the system will calculate how much the Club will collect.

11.   Card fees and transaction fees are all calculated automatically and will be displayed / will be transparent to the member when purchasing the membership.

12.   When finished click SAVE

13.   Note. If a member chooses to register for more than one category e.g. an Adult Player, a Coach and a Referee, the system will only charge one price (The highest) but will register the player for all three roles in your Database

Final Check before you begin selling

The above steps can be completed while your club is waiting to have its bank merchant account set up. However, you will receive a warning to inform you that "one of your Payment Methods is not fully active" if your merchant bank account is still pending approval. You will need to complete that process before the membership will be made available for sale on the public website.

5.0. User Registration POV

We will now take a look at what the member who wants to purchase membership will see.

Please note: Members will be asked for some personal details by the Payment Provider ie: bank branch/type of account/phone provider etc. This information is used to verify your identity, and is taken for routine security precaution. Reminder: All financial information is confidential and is not shared with SportLomo or Clubs.

JOIN CANADA RUGBY

How a new member registers with a Club

Link: https://reg.sportlomo.com/rugbycanada

This is where a potential new member would begin to register. Here we have an interactive map with the provinces in Canada. Your club will be provided with a link which you can promote on your club website, send out to existing members in an email or add to your club Facebook account.

To find your nearest club you can click on your province or enter your postcode, or just select from the list provided if you already have a club in mind.
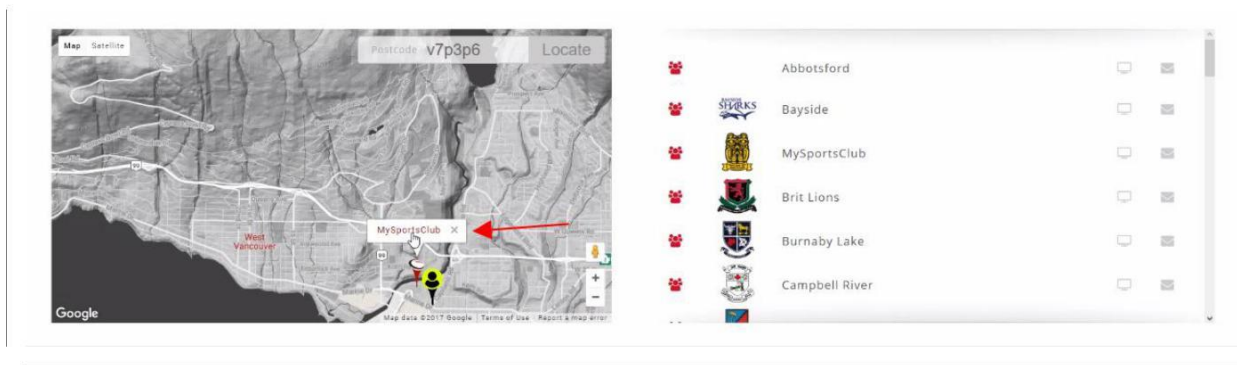
1. I select the club I wish to Join

1. The member will be brought to the list of memberships for sale for that club

2. The member will select the Membership(s) they wish to purchase

3. This will bring them to a create account or login screen.

4. If you (the member) do not already a SportLoMo account you will fill in your information in the fields provided, choose your language, read the Terms and Conditions, accept the Terms and Conditions and then tick the Captcha and register.

5. Once you are signed in, you can review any choices you have made before continuing.

6. When done click continue.

7. The new member will be asked to complete the forms with the required fields (as set up / configured by the club administrator)

8. When done click "Register"

9. You will be then given a Purchase Summary before proceeding with payment.

10. Once reviewed click "Proceed with Payment".

Purchase Summary

Receipt: ray.lane@sportlomo.com

Proceed With Payment

Membership	Quantity	Price
Demo User	1	194
	Total (Ex Card Fees)	194

11. Here you can enter your credit card information.

12. This information is then transmitted securely through HTTPS encryption to the payment provider. No Credit Card details will be stored by SportLoMo

13. SportLoMo has no access what so ever to this information nor is it ever stored.

sportlomo   Rugby Canada Demo

Registration Overview

Reference
173

Quantity	Item	Unit		Price
1	Demo User	CAD 194.00	CAD	194.00
1	Fees	CAD 8.31	CAD	8.31
		Total	CAD	202.31

« Return to Rugby Canada Demo

Pay With Your Credit Card

Cardholder Name

Credit Card Number

Expiry Date(MMYY)

Pay With Your Credit Card

Your private information is secured using SSL (Secure Sockets Layer), the leading security protocol on the Internet. Information is encrypted and exchanged with an https server.

Secure Payment provided by E-xact Transactions Ltd.

e-xact
TRANSACTIONS

6.0 Events

This is where a club or province can set up an event to sell tickets, coaching courses, tournament entries etc and take payments for them directly online separately from your membership database which eliminates possible duplicates.

Step 1

Click "Events" on your administration panel
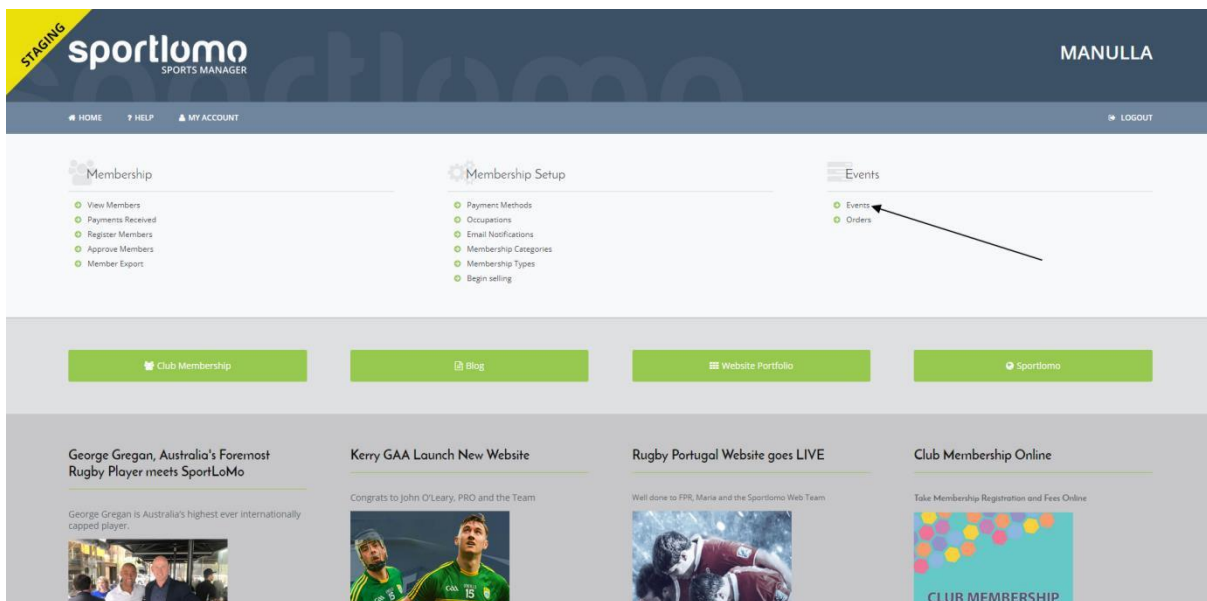
Step 2

Click "Add", this will bring you into the setup
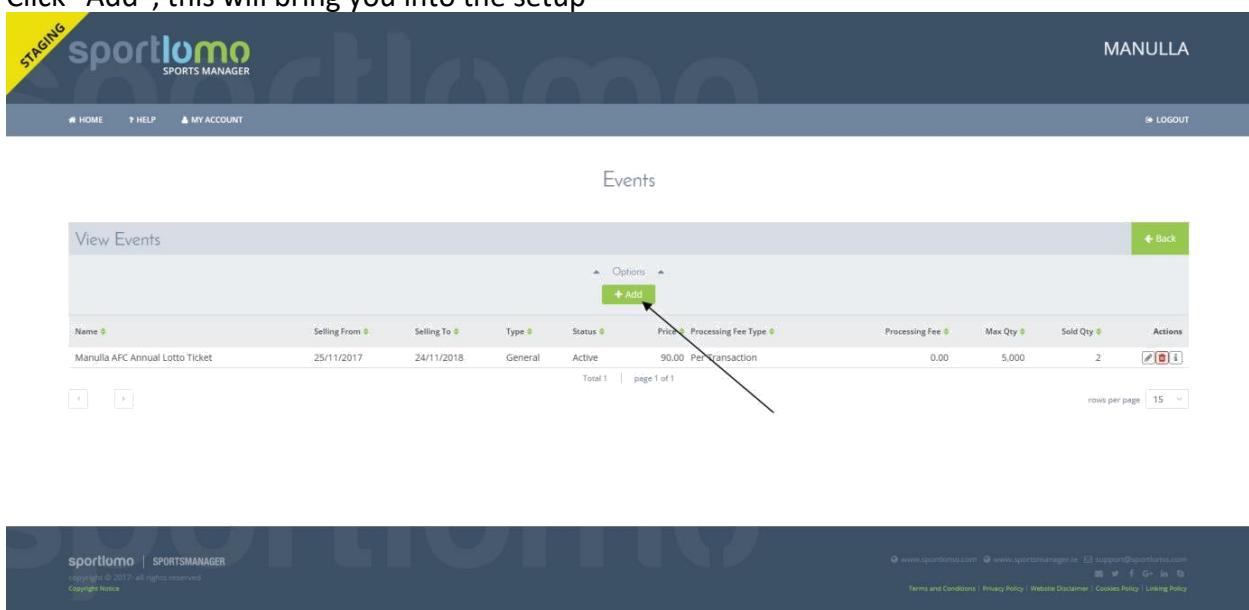
Step 3:

You now need to fill each field with the event details, firstly give it a name.

Next give your event a description that customers will see before they purchase.

In the next field you may attach an image to your events.

You then must set a date range that the ticket is available to purchase.

Next select whether the event tickets are to be made available to the General (Public), or

Membership (Your registered members), you can choose to only select certain membership categories for tickets to be available if needs be.

Next you set your price per ticket, followed by processing fee "Type" which is per item or per transaction. Next you will be asked to attach a processing fee; this is added by you, if you wish, to the already existing processing fee. If you do not want to add a fee on just assign "0" to the value.

Next you assign the maximum quantity of tickets allocated for the event and also how many tickets can be purchased per user.

Events

Add New Event   ← Back

Event Name
Description

Event Image   Choose file
Selling From Date
Selling To Date
Event Type   Membership ∨
Price
Processing Fee Type None   ∨
Processing Fee
Max Qty
Max Per User Qty

Below you can see the "Adult" membership category available for selection when "Membership" is selected as the event type as referred to previously.

Events

Add New Event   ← Back

Event Name
Description

Event Image   Choose file
Selling From Date
Selling To Date
Event Type   Membership ∨
Price
Processing Fee Type None   ∨
Processing Fee
Max Qty
Max Per User Qty

Membership Categories

Please select the categories that this event applies to

Adult

Save

Below is the fully completed "Event" setup, click "save" and the event setup is complete.

Here is the Event setup in your events admin panel

Here is the event itself that customers will see and be able to select for purchase.

7.0 Discount Codes

This is where a club or province can attach discount codes to be applied to certain memberships and event ticket purchases.

First go to your admin panel and click "Discount codes"
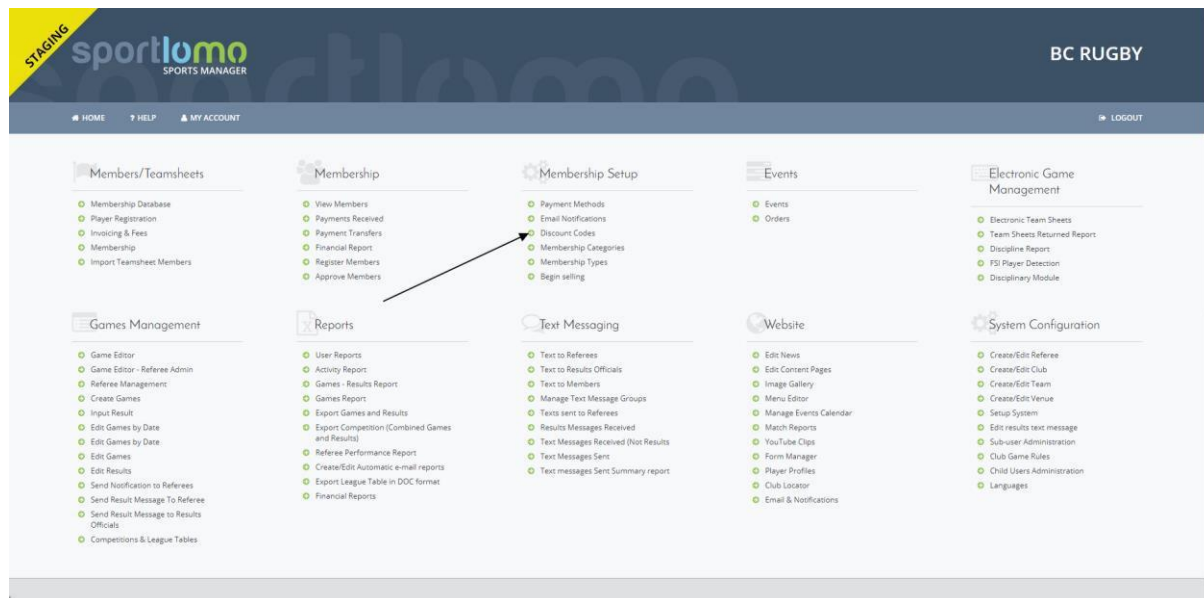
You can see below codes setup can be seen on this page, next click "Add" to setup a new code.
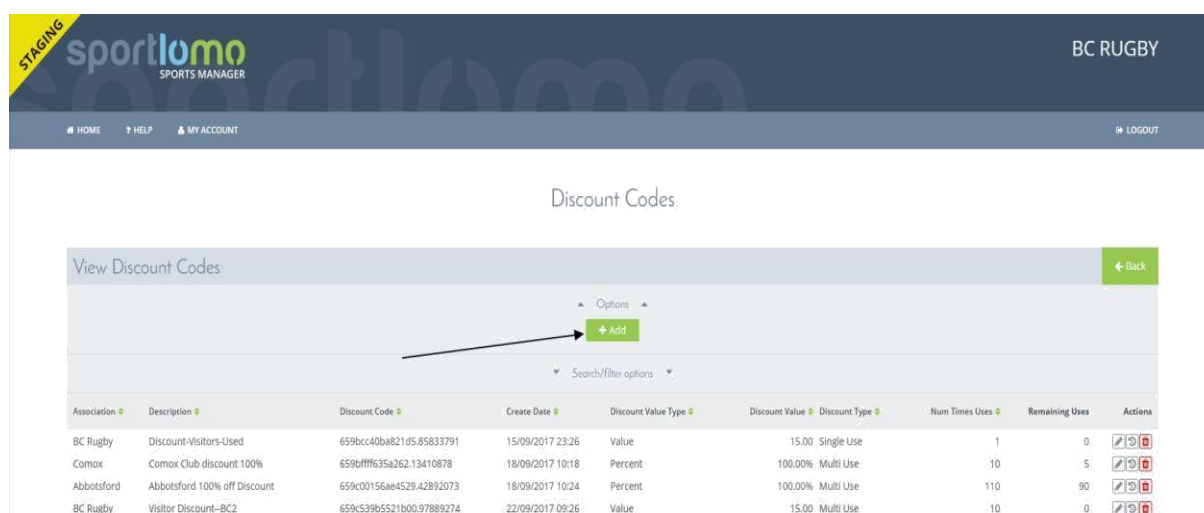
You can now fill in the fields supplied.
First select club/association for the code to be applied to.

Next you can give the code a description

Next choose the discount value type you wish to take, be it a value or percentage discount.

You can then assign the maximum number of times the value can be applied.

As seen below you may select which "Membership Categories" the discount will apply too. Click "Save" and Discount code will save.

Click the "i" icon on the discount codes admin panel where you will see the fully setup discount code, as you can see a discount code has been randomly generated and is now available to view.

Provinces/Clubs can now send this code to members to use and input when purchasing memberships/event tickets

When the member receives there discount code from the Province/Club they will input it when purchasing as can be seen in below screenshot. It will automatically apply the discount for the member to see and confirm purchase.

8.0 Orders (Events)

This is where a club or province that has set up the "Event" can monitor all purchases independently of their membership database.

Step 1

Click "Orders"

Step 2

Here you can monitor who has bought event tickets and at what stage the payment is at, along with details of said purchaser.

Step 3

Click the "i" icon

You can now view all the purchasers detail in more detail
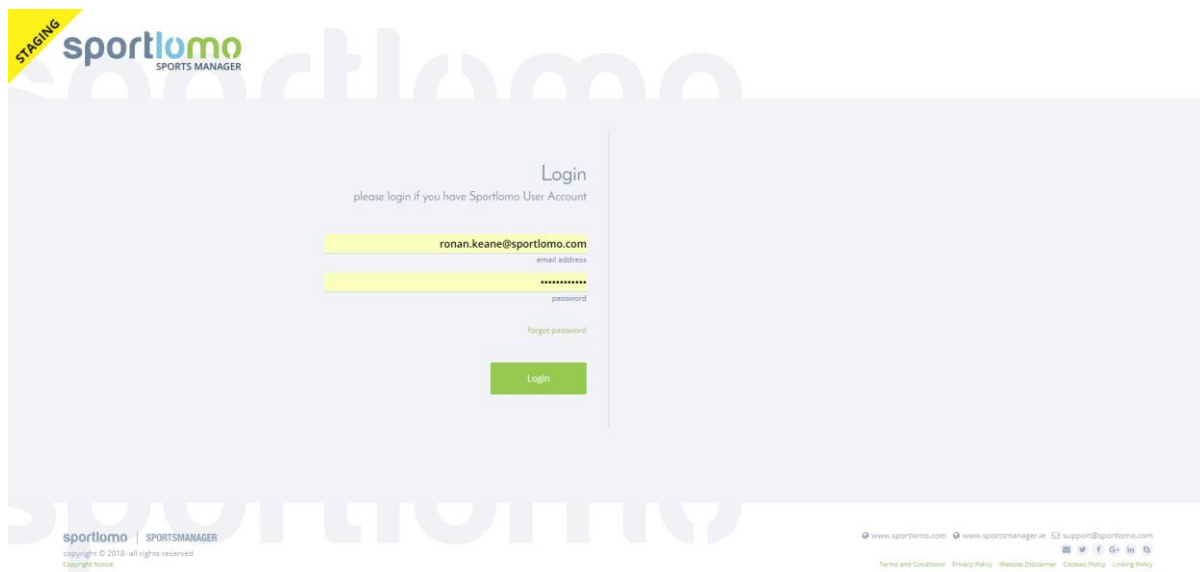
9.0 Transfers

This is where members can transfer from club to club, province to province.

Log in to your Sportlomo account.

Step 1

Click "Members" on your admin panel
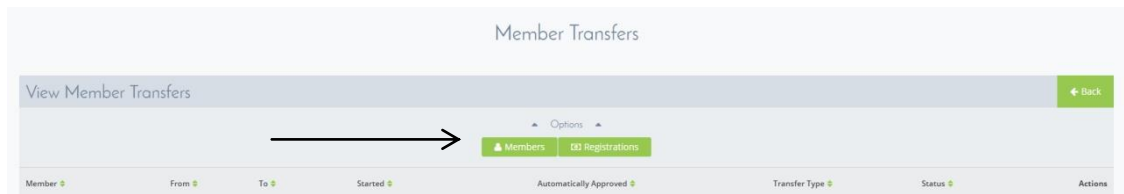
Select your club and the club you are transferring to,

Give reason for transfer and click "request transfer"

You will see the breakdown of your transfer request

You will also see who has to approve the transfer, in this case Bayside and BC Rugby

Step 3

Once approved you will receive a confirmation email

You can then sign back into your Sportlomo account

Click Arrow under actions, then you can select the membership you wish to purchase in your new club

Provincial fees are excluded as they have already been paid.

10.0 Upgrades

Step 1

Login to your SportLoMo account with your email address and password
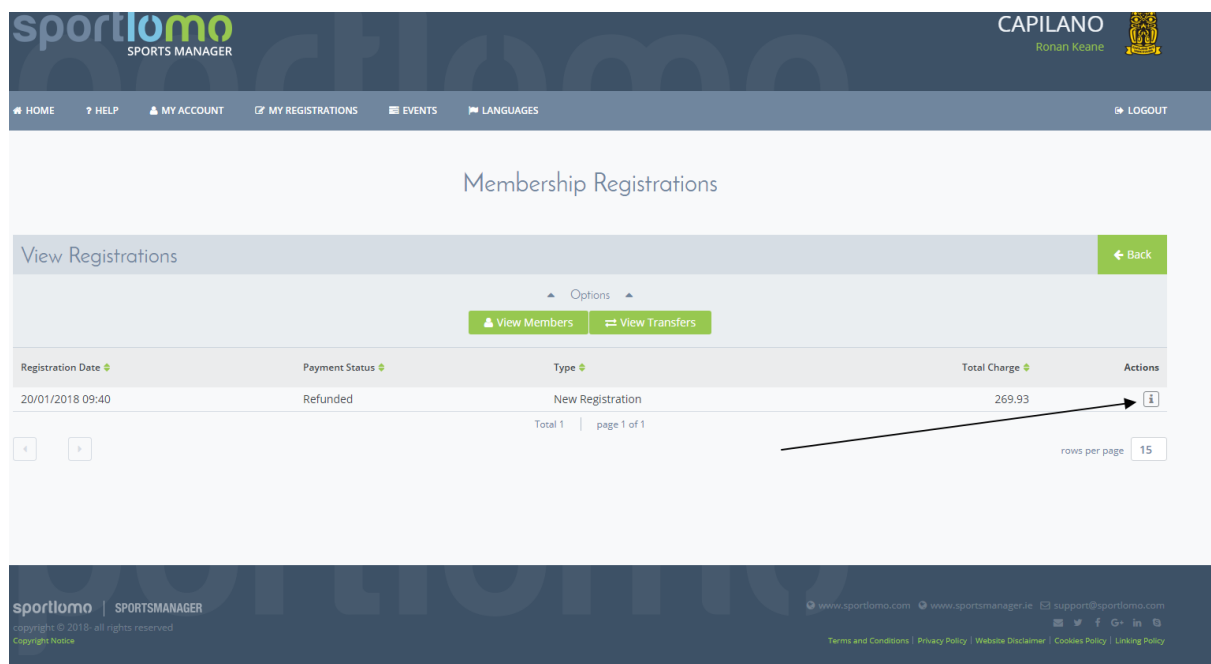
Step 2

Choose your club from the drop down menu
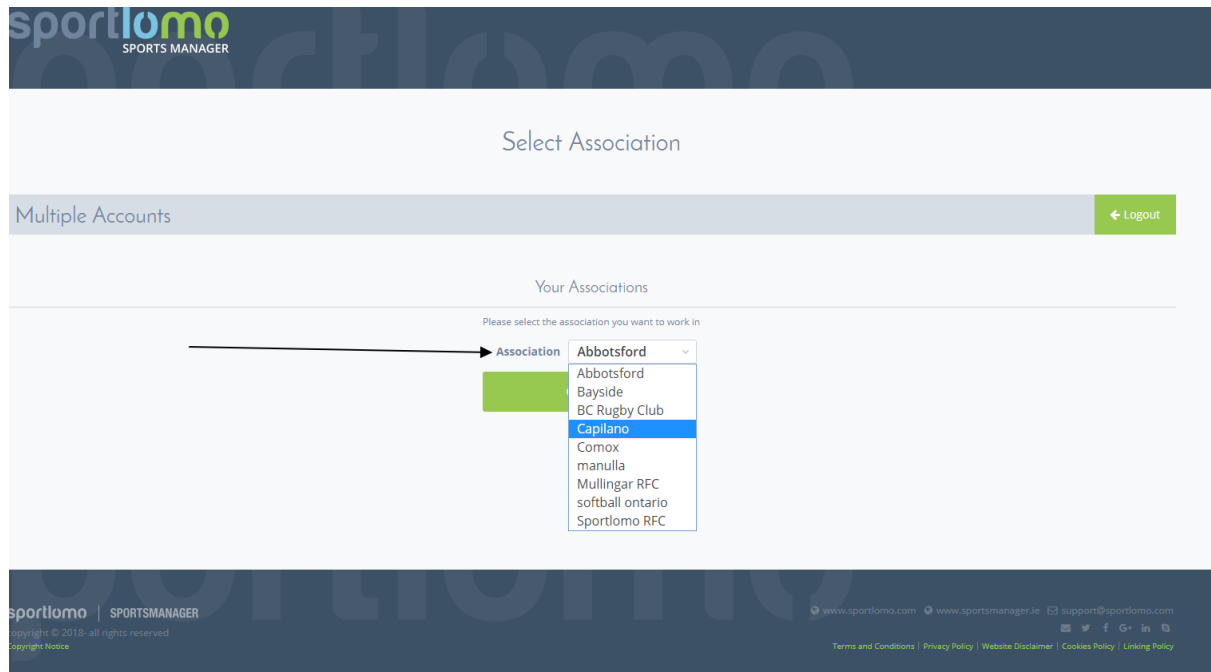
Step 3

When you've selected your club, click on the "i" icon

Step 4

Scroll down to "Members", Click arrow icon underneath "Actions"

Step 5

Select the membership category you wish to add on (Upgrade) to your membership.

Step 6

If your new upgraded membership is lower in price than your initial membership, then there will be no added charge, we incorporate "pay highest only" into the system.

Step 7

In your Sportlomo account you can now view the upgrade on you membership.

Step 8

When the upgrade is completed you will receive a receipt outlining any charges you incurred and what membership you're now subscribed to.

sportlomo

Membership Upgrade Payment Received

Dear Ronan Keane

Please find below details of your membership upgrade

Email Address	Registration Date	Registration Type	Total Paid
ronan.keane@sportlomo.com	25/01/2018 04:16	**Upgrade**	**0**

Payment Breakdown

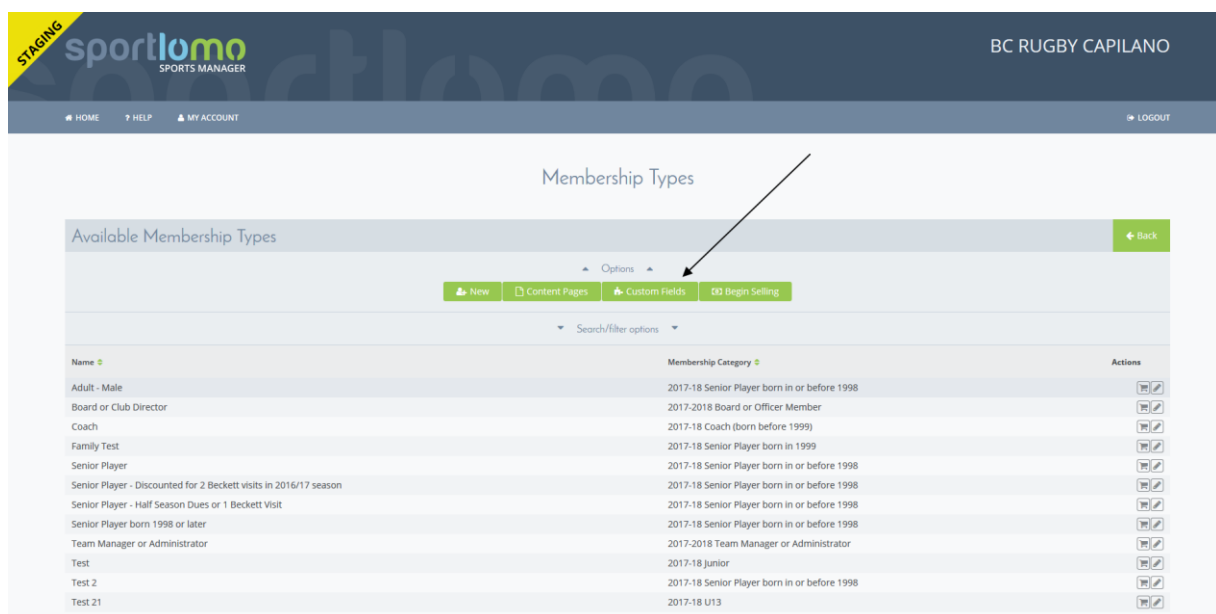| Association	Category	Amount
Capilano	2017-18 Coach (born before 1999)	0.00
BC Rugby	2017-18 Coach (born before 1999)	0.00
Rugby Canada	2017-2018 BC Coach	0.00
Provider Fees		0.00

11.0 Custom Fields

Here clubs have the ability to create their own custom fields in membership types.
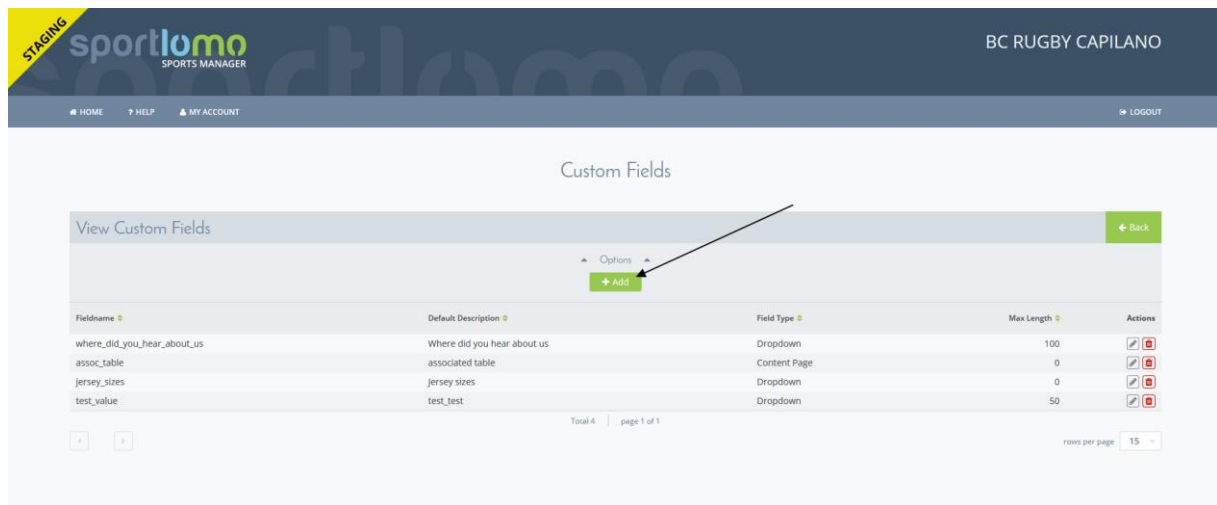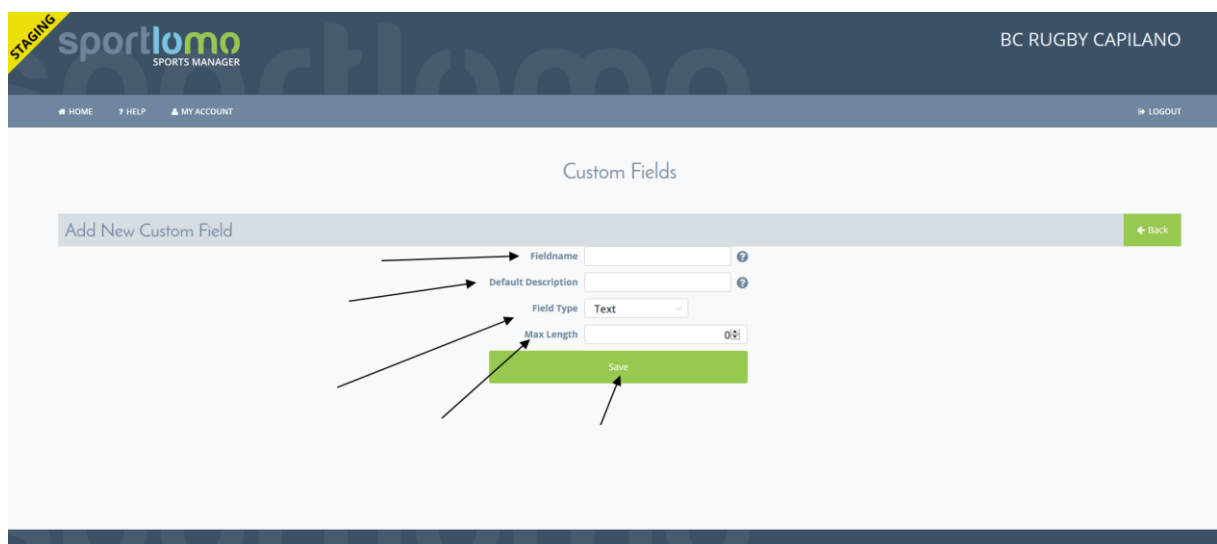
Step 1 – Click Membership Types on your admin panel
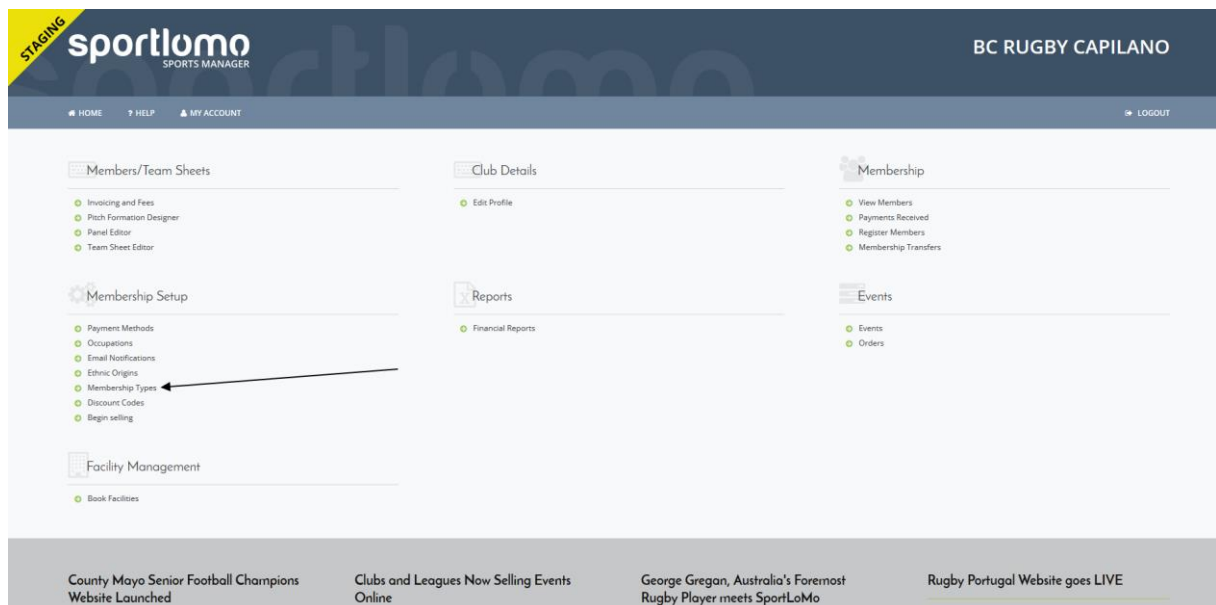
Step 2 – Click Custom fields

Step 3 – Click "Add" to create a new field

Step 4 – Fill in details for new field.

You can see that there is a dropdown with a number of options for you to select, this is telling us what type of field it will be ie: Dropdown, number, text etc

Once save you can view/edit/delete from your admin panel.

Feel free to contact us through our website, live chat, and email or by phone if you have any questions:

Website - sportlomo.com/contact/

Email - support@sportlomo.com

Telephone - +353 94 9026663