



IMG SPORTS TECHNOLOGY GROUP

GET TO KNOW – TIERED MEMBERSHIP TRAINING NOTES FOR STATE & NATIONAL REGISTRARS

This is a training document for State & National registrars. It is designed to give an understanding of some of the basic functions in the IMG STG Membership system.

The document is separated into sections, with an approximate indication of how long it will take to complete each section. Feel free to break up the sections as needed. Throughout the document you

will see  which requires an action (ie. Log in, update, go to etc), and  which indicates a learning section (understanding the system structure).

Section 1 – System Structure (5 Minutes)

It is important that administrators understand how the system is structured in a tiered environment. This section is also important for understanding how your organisation fits with the "State" and "Club" generic terms used in this document.

Section 2 - Management Console (Back End) & MemberDesq (Front End) (5 Minutes)

This section covers two important parts of the system; the Management Console - where administrators log into, and MemberDesq - where members log into. All administration processing occurs in the Management console. All the member's interactions occur in MemberDesq.

Section 3 – Processing Memberships and Payments (30 Minutes)

This section is designed to give an understanding of how members can be updated and made financial within either the Management Console or MemberDesq environments and how transactions can be cancelled in the Management Console.

Section 4 – Set Up – The MEMBERS Menu (25 Minutes)

This section discusses the set up function of the system, within the MEMBERS menu. It includes the menu MEMBERS / OPTIONS, MEMBERS / REGISTRATION DECLARATIONS, MEMBERS / MEMBER TYPES and MEMBERS / MEMBER GROUPS

Section 5 – Set Up – The SUBSCRIPTIONS Menu (30 Minutes)

This section discusses the set up function of the system, within the SUBSCRIPTIONS menu. It includes the menu SUBSCRIPTIONS / OPTIONS and SUBSCRIPTIONS / SUBSCRIPTION TYPES. It also includes how to distribute and syndicate a Subscription Type to Clubs.

Section 6 – The ADMINISTRATION Menu (15 Minutes)

This section shows how from the State organisation an administrator has access to the list of clubs, and how to log directly into their system. It also provides information on creating custom questions in the CUSTOM FIELDS menu and understanding how users can be given restricted access to the Management Console from the USERS menu.

Section 7 – MEMBERDESQ Portal (5 Minutes)

This section is designed to show how the MemberDesq Portal can be modified by the State administrator.

Please refer to the Appendix documents as detailed to assist in learning. By using these documents, you can feel confident passing the information to Clubs, as this is the support information that is provided to them.



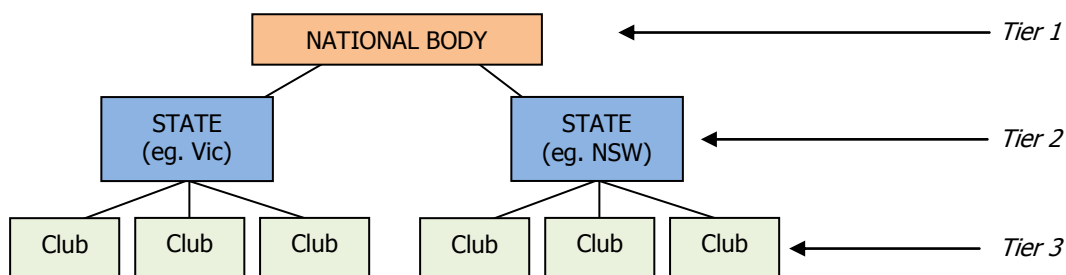
SECTION 1 (5 MINUTES)
SYSTEM STRUCTURE

Depending on your organisation, your system may be set up in two or three levels, referred to as tiers.

Three Tiers

In a three-level or tiered system, the governing body or National entity sits at the top of the tier, known as "Tier 1". The middle tier is the State organisation (which may be the League, Association or Branch depending on your organisation's terminology). The lowest tier is the Club, known as Tier 3.

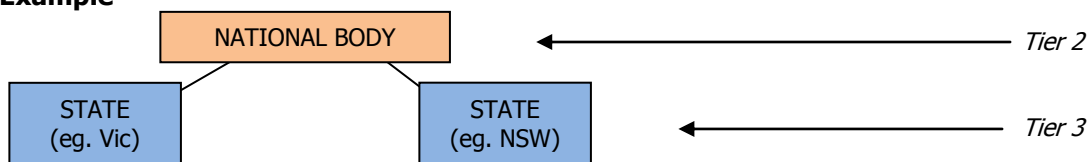
Example only



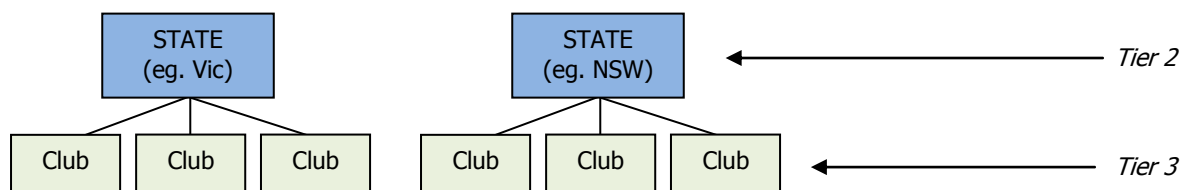
Two Tiers

Two tiered systems involve only two levels. Depending on the structure for your organisation, the top tier might be the governing body with States or Branches on the lowest tier, or it may be the State at the top with Clubs at the bottom. In the IMG system, in a two tiered system, the lowest level is referred to as a Tier 3 and their parent the Tier 2.

Example



Example



This document refers to the State Management Console, and the Club Management Console, this is indicating the tier 2 and tier 3 levels respectively.



SECTION 2 (5 MINUTES)

MANAGEMENT CONSOLE (BACK END) & MEMBERDESQ (FRONT END)

The Management Console is referred to the “back end” and is where administrators log into, and the Member Portal is referred to as the “front end” because it is the public part of the system where members log into.

2.1 IMG MANAGEMENT CONSOLE (“BACK” OR “ADMINISTRATOR” END):

<https://console.imgstg.com>

TEST SYSTEM LOG IN’S

This is a generic test system that you are welcome to return to at any time. **Please do not change the log in details to the State or Club Management Console.**

State

The username is: IMGSS

and password is: SAMPLESTATE

Club

The username is: IMGSC

and password is: SAMPLECLUB

Note that throughout this document, you will be asked to be logged in as either the Club or the State in the IMG STG test system. Please ensure you log in and out of the Management Console unless indicated. DO NOT have both Management Console log ins active at the same time, as this may cause confusion in learning the system.

2.2 MEMBER PORTAL (“FRONT END”)

State Test Member Portal (Front end)

<https://memberdesq.imgstg.com/index.cfm?fuseaction=main&OrgID=4177>

(the link goes from the “h” to the “7”)

2.3 TEST CREDIT CARD INFORMATION

This system is in test mode. Use the following test credit card to complete all the test credit card transactions.

Mastercard

5555 5555 5555 4444 (without the spaces).

Expiry date is any date in the future (Eg: 12/2013)

Name on the card doesn’t matter

SECTION 3 (30 MINUTES) **PROCESSING MEMBERSHIPS & PAYMENTS**



Log into the Management Console using the **Club** log in, and in a separate browser window, have the Member Portal open (the address for this can be found on page 3).

3.1 NEW MEMBER THROUGH THE FRONT END PORTAL



From the Member Portal, select “New Registration” from the menu on the left hand side of the page, select “IMG STG Sample Site – Club” and go through the registration process. Use the test credit card to complete the transaction.






The system will send you payment confirmation emails – one from the Test Club, and one from IMG eCommerce. This process is completed in the exact same way for the live membership processing. Note the narrative on the email – this is the “Receipt Narrative” in the SUBSCRIPTION TYPE.

3.2 MEMBERS AND MEMBERS LISTING



At the Club Console, go to the menu MEMBERS / MEMBERS LISTING.




The member that you have just added will have an ONLINE  status. Depending on the amount of testing there may be some members with a green tick or ACTIVE status  or a red dot INACTIVE status .

The MEMBER STATUSES are:

ACTIVE = 

ONLINE = 

INACTIVE = 




PENDING =  (may not be used in your organisation)

To further your understanding, consult – Fact Sheet 1 - ‘Adding members and Members Listing’. It will provide more detailed information on the MEMBERS LISTING and in particular the MEMBER STATUSes.

All members for the database will appear in the MEMBERS LISTING, whether they are added into the system themselves through a front end or through the back end by a Club registrar.

The most important areas to note here are the MEMBER STATUSes and FINANCIAL STATUSes and the implications of these when reporting and communicating.



Choose a member that has an ONLINE  status, *activate* their record by clicking on the status icon – they will change to an ACTIVE  member. Click this again, note that they have now become an INACTIVE  member.

3.3 NEW MEMBER THROUGH THE BACK END



Still in the Test Club console, from the menu MEMBERS / MEMBERS LISTING add a new member and pay the subscription using the *Offline* credit card facility.

To add a member click on the ADD button in the MEMBERS / MEMBERS LISTING menu. When adding the member, select "Senior" as the DEFAULT MEMBER TYPE, and "Senior" from the DEFAULT SUBSCRIPTION TYPE. You will notice that the member's username and password has already been assigned; change this to make it easier to remember because you will log back in as this member in the next steps and it will make logging in easier. Note that the fields FINANCIAL and FINANCIAL TILL DATE are blank. Click SAVE to save the changes.

Then to create and pay a transaction:

1. At the top of the screen click the SUBSCRIPTION button.
The drop down should have "Senior"
2. Click NEXT
3. Click GENERATE
4. Click POST
5. Click PAY
6. Click the OFFLINE CREDIT CARD button, enter the test credit card details then SUBMIT. *If the administrator wanted to process manual payment (cash, cheque) the payment type would be selected from the "pay" screen (step 5) and then the PROCESS PAYMENT button would be clicked to finalise the transaction.*

Go to the menu SUBSCRIPTIONS / TRANSACTIONS / PAID and note the transaction there. Return to the MEMBER LISTING. Find your member, click the icon under the view menu and note the change in FINANCIAL and FINANCIAL END DATE.



To further your understanding, consult – Fact Sheet 2 - How to Add Member and Make them Financial.

3.4 LOG IN AND COMPLETE A REGISTRATION RENEWAL FROM FRONT END



Go to the front end Member Portal, and click "Log In" from the menu. Log in using the member's username and password you just created. Go to the menu UPDATE DETAILS to change any of the information for your test member, update.

Click "Registration Renewal" in the menu and complete the renewal process.



This is the exact process that existing members, which can be imported into the live system will go through.


3.5 GENERATE AN UNPAID TRANSACTION (INVOICE) AND PAY IT OFF FROM THE FRONT END



Not all organisations will invoice members, however this action is to understand that members can have payments generated for them that can then be paid off by the member.



Still within the Club Console go to the menu MEMBERS / MEMBERS LISTING. For the member whose username and password you've changed take the following steps:

1. Click on the icon under the SUBS column  to begin the process of generating a subscription.
2. Click NEXT
3. Click GENERATE
4. Click POST

Do not click the PAYMENT button.

Once posted, click on the SUBSCRIPTIONS / TRANSACTIONS / UNPAID menu. Notice the unpaid transaction (the one you just created).

Go to the front end Portal, if still logged in as the member, go to the menu PAY SUBSCRIPTIONS. See that the unpaid transaction you created is there to be paid?

Click the red status icon, it will turn green and the PAY NOW button will appear. The benefit of this is that the member can have multiple invoices awaiting payment. Pay off the invoice using the test credit card.

3.6 CANCELLING A TRANSACTION AND REFUND



From the Club Console go to the menu SUBSCRIPTIONS / TRANSACTIONS / PAID. For one of the transactions you've created and paid by credit card, click the cancel button to cancel it.

Update the financial status to make this member unfinancial, and take the date back to 1/01/09. Once completed, go to SUBSCRIPTIONS / TRANSACTIONS / CANCELLED, see the green dollar sign under the refund column? Click this, modify the amount to refund, complete any relevant comments and process the refund.

All other sections in this document refer to being in the Management Console. You will be asked to log in between the Club and State systems. DO NOT log into both at the same time.

SECTION 4 (25 MINUTES)

SET UP - THE MEMBERS MENU



As an introduction to how members are categorised in the database note that members are assigned to a MEMBER TYPE *and* a SUBSCRIPTION TYPE.

The MEMBER TYPE is the field that the National, State and Club bodies use for reporting, exporting and email communications. A SUBSCRIPTION TYPE is the amount of money they pay.

Members can only be assigned to one MEMBER TYPE and one SUBSCRIPTION TYPE at a time; however they may belong to any number of MEMBER GROUPS.

4.1 MEMBER OPTIONS (2 minutes) -



Continuing to be logged in as the Club, go to the menu MEMBER / OPTIONS.

Note the features that allow the administrator to customise the standard features of the system related to member's record, such as date of birth, gender etc.

4.2 REGISTRATION DECLARATIONS (5 – 10 minutes)



Log out of Club, and log in as the State in the Management Console. Go to the menu MEMBERS / REGISTRATION DECLARATIONS.



Declarations are the Terms and Conditions that the member agrees to when joining as a new member or renewing their membership in the MEMBER PORTAL. Declarations created at the State level will appear for members joining any organisation attached underneath the State (whether using the State MEMBER PORTAL or a Club MEMBER PORTAL).

Each entity has up to three REGISTRATION DECLARATIONS in this menu. An example where an organisation might use more than one declaration is if an organisation had declarations for member conduct, privacy policy and refund policy.

In addition to the *syndicated* declarations, declarations can be attached to the SUBSCRIPTION TYPES. An example where this might be utilised is for junior members who may need to agree to a separate junior declaration.



Feel free to test the declarations at the Test State and Club levels by changing the declaration, then refreshing the MEMBER PORTAL. The declarations only appear on the front end, when the member renews or joins new – not when using the PAY SUBSCRIPTIONS option.

4.3 MEMBER TYPES (1 minute)



Log out of the State, and log back in using the Club log in. Go to the menu, MEMBERS / MEMBER TYPES.



You will notice that there isn't an edit button on the member types. They are being *syndicated* from the higher level down to the Club level. This syndication allows uniformed reporting and communication across all two tiers of the system.



Understand how the MEMBER TYPES are communicated to and reported on by going to the menu MEMBERS / SEND EMAIL / MEMBER TYPE, then MEMBERS / EXPORT / MEMBER TYPE.

It is unlikely that modifications and additions to the MEMBER TYPE menu will be required once the live system has been created however it is important to understand how members are categorised in the system.


4.4 MEMBER GROUPS (5-10 minutes)



Like MEMBER TYPES; MEMBER GROUPS can also be used for reporting, exporting and communications, however unlike the MEMBER TYPES, members can be assigned to multiple member groups.

MEMBER GROUPS may be *syndicated* from the tier 1 or tier 2 entities to Clubs, or the Club can create their own.



Log out as the Club, and log back in as the State in the Management Console. Go to the menu MEMBERS / MEMBER GROUPS. Click the view icon  aligned with a group.





The "Member Access" setting allows members to assign themselves to a group when they join new or renew their membership in the MEMBER PORTAL. This could be used in instances such as the member wanting to be kept informed of multiple e-Newsletters at the State and Club levels.

The "Publish" setting shows members belonging to the group on the organisation's website – This feature is restricted in most organisations.



Return to the list of groups by clicking the LISTING button. Add a group and give it a data entry label.

Once added, go to the menu MEMBERS / MEMBERS LISTING, click on the groups icon  along side one of the members. Assign the member to the group by clicking on the status icon – it will turn to a green tick and an edit icon  will appear for the label, click this and enter some information into the label.

SECTION 5 (30 MINUTES)
SET UP - THE SUBSCRIPTIONS MENU

Members in the database are assigned to a MEMBER TYPE *and* a SUBSCRIPTION TYPE.

The SUBSCRIPTION TYPE is the amount of money that they have paid for their membership.

5.1 SUBSCRIPTIONS OPTIONS (5 minutes)



The menu SUBSCRIPTIONS / OPTIONS allows the administrator to modify the GST status of their organisation, define whether the organisation will pass on administration fees to the member, set system emails to be sent, and set overriding transaction filters.



Go to the menu SUBSCRIPTIONS / OPTIONS. Click the EDIT button.

1. Note the three GST options.
2. Note the Administration Charge is set to 6%, and the organisation is absorbing the full 6%, by having a 6 in the Absorption Box
3. Note the number of automated email functions that can be turned on.
4. Note that there is a date range. This date range affects the transactions that show in the Club's management console, and will need to be adjusted by the Club (and State) in future years. *(Note changes to this date take approximately 5 minutes to refresh in the system)*



Charge and Absorption settings are important to understand as they can have implications to the cost of the membership for members. The absorption feature is in the system for organisations that charge an administration fee for memberships; it is not dependent on the payment method.

Removing the number from the Administration Charge Absorption box means that an administration fee will be added to all transactions (that is members will be asked to pay more for their membership). This causes confusion for Clubs and creates a price differential for paying by manual means to online means.

As you can see from the table below the administration fees are split across the tiers of the organisation:

All Entities Absorbing Administration Fee				
	SUBSCRIPTION TYPE Amounts	Member pays	Administration Fee (6%)	Amount remitted to entity
Club Fee	\$100.00	\$100.00	\$6.00	\$94.00
State Fee	\$100.00	\$100.00	\$6.00	\$94.00
Totals		\$200.00	\$12.00	\$188.00

Club Entity is <u>NOT</u> Absorbing Administration Fee				
	SUBSCRIPTION TYPE Amounts	Member pays	Administration Fee (6%)	Amount remitted to entity
Club Fee	\$100.00	<u>\$106.00</u>	\$6.00	\$100.00
State Fee	\$100.00	\$100.00	\$6.00	\$94.00
Totals		\$206.00	\$12.00	\$194.00



Log into the management console with the State log in and edit the SUBSCRIPTIONS / OPTIONS menu. Visit the Members Portal and create a new registration. Note the difference in the values of the SUBSCRIPTION TYPES on the right hand side of the screen. Log back into the State Console and change the absorption rate back to 6.



Email options. Our recommendation is that all options are kept to NO, until the Club is familiar with the emails that the system can, and will send automatically (if they are turned on).

The only exception may be the "Automatic Members Advice Email" option which sends an email to the address in ADMINISTRATION / DETAILS menu informing the administrator of an online membership payment. Smaller Clubs that do not log in regularly will find this a helpful option.

5.2 SUBSCRIPTION TYPES (20 minutes) – MUST DO



The set up of the SUBSCRIPTION TYPES is perhaps one of the most important parts of the membership system. The most important settings are detailed below.

FINANCIAL STATUS

A member is made financial by the *payment* of a subscription – the Financial, and Financial End Date is the area that tells the system to update the member to be financial, and what date they should be financial up until.

The system will automatically make the member unfinancial the day after this date (their MEMBER STATUS will remain ACTIVE). Most organisations utilise the Financial End Date setting, although by selecting the "Period" or "Days" Option, the system supports "rolling" financial memberships.

MEMBER INTEGRATION

If YES is selected, then there must be a corresponding DEFAULT MEMBER TYPE selection made. If YES, this subscription type will be set to appear on the front end MEMBER PORTAL.

If the SUBSCRIPTION TYPE is to be used by system administrators only eg. Life member, then this would be turned to NO, and members could not join this from the portal.

Note that when the member is looking at the fee types that they can select at the front end portal, they are looking at the SUBSCRIPTION TYPES. The settings in the MEMBER INTEGRATION area tells the system what MEMBER TYPE the system will allocate them to when the member completes that registration (remembering that members are attached to a MEMBER TYPE and SUBSCRIPTION TYPE).

RECEIPT NARRATIVE

The RECEIPT NARRATIVE appears in the payment confirmation email that the member receives when they make an online payment.



Subscription Types at Club Level

There are three ways that a Club can have SUBSCRIPTION TYPES;

- 1 – The State *Syndicate* the type to the Club
- 2 – The State *Distribute* the type to the Club
- 3 – The Club adds their own (State fees cannot be put in with this type).

In most organisations, SUBSCRIPTION TYPES are *Distributed* to the Clubs. The Syndicate setting in SUBSCRIPTION TYPES at the State level is therefore not explained in detail here. When a Subscription Type is distributed from the State level, it creates a copy of the original and puts it in the Club's SUBSCRIPTION TYPES list. The Club can edit all fields, except the amount owing to the State entity, so allows them to add their Club fee on top of the State fee.



Step 1 – Copy an existing SUBSCRIPTION TYPE.

At the State Console, go to the menu SUBSCRIPTIONS / SUBSCRIPTIONS TYPES, click on the COPY button and copy the "Senior" type. Once copied, click the EDIT button. (*This action point is to keep the original "Senior" type in tact.*)

Step 2 - Edit the SUBSCRIPTION TYPE

Modify the TITLE, the DETAILS, change the STATE and TOTAL amounts and change the RECEIPT NARRATIVE.

Update to save these changes.

Step 3 – Distribute a SUBSCRIPTION TYPE to your Club

Log out of the State and into the Club in the Management Console. Go to the menu SUBSCRIPTIONS / SUBSCRIPTION TYPES. Note that your SUBSCRIPTION TYPE does not appear.

Log out and back into the State. Go to SUBSCRIPTIONS / SUBSCRIPTION TYPES and click the DISTRIBUTE button. Select the SUBSCRIPTION TYPE that you edited from the drop down selection and click next. From the distribution list, select the Club. Select YES on "Lock State Amount", leave the Club Amount open. Click the DISTRIBUTE button.

Once the distribution has been successful, log out and log in as the Club. Go to the menu SUBSCRIPTIONS / SUBSCRIPTION TYPES. Note that your SUBSCRIPTION TYPE is showing with an edit button.

Edit the type, notice that this is an exact copy of what you created at the State level; however the State value is locked in. Add the Club fee and update the total amount, this is the process that will be required for the Clubs to add their club fee.

SECTION 6 (15 MINUTES) **THE ADMINISTRATION MENU**

6.1 CUSTOM FIELDS (5-10 minutes)



Log in as the State in the Console. Go to the menu ADMINISTRATION / CUSTOM FIELDS.



Each entity has the ability to add a number of custom questions to the standard system through the CUSTOM FIELDS menu. These CUSTOM FIELDS are separate to the question settings at the MEMBERS / OPTIONS menu.

There are up to 6 text questions, 4 date questions, 4 yes or no questions 2 number questions and 4 list box questions for each level in the entity.

- Text questions provide 160 character responses,
- Date questions can either be dd/mm/yyyy or a calendar selection depending on the MEMBER OPTION setting of the organisation.
- Yes / No questions can be defaulted to either option and appear as a radio button.
- Number questions must be full numbers not decimals,
- List box question options are comma delimited (by default the system takes the first option in the list, so the first option should be "Please Select").

Below explains the settings on the questions.

Show: Show the question in the back end of the system only (members on the front end would not see this if this was set to YES, and the other options were set to NO)

Required: Is this question mandatory?

Register: Do you want new members registering to see this question and give a response?

Member: Do you want an existing member to be able to add or edit responses to this question?

View: Do you want higher or lower entities to be able to view the answers to this question?

Edit: If they can view it, as above, do you also want them to be able to edit the member's record?


Default: Used for YES/NO questions, by default, what response do you want to show?

6.2 CLUB LISTING



Still within the State Console. Go to the menu ADMINISTRATION / CLUB / LISTING. See the test Club listed there?



From this menu the Club organisation contact information and log ins can be viewed and changed. The organisation can also be deactivated, preventing access into the system (please DO NOT change the access from a green tick). State administrators can also log directly into the Club from this menu by clicking the login icon  under the Login column.



Click the Login icon. You will be logged out of the State system and logged directly into the Club system.

6.3 USERS



Within the Club log in (you should be there if you are continuing from the previous section, go to the menu ADMINISTRATION / USERS. View the user “Johnny Citizen”. Note that not all of the functions are ticked. Note that the log in information for John can be edited by the administrator.

Log out of the Club, and log into the Management Console using John’s username and password (JOHNNY and CITIZEN).

Go to the menu MEMBERS / LISTING. Note that the members can be viewed, but not edited. Go to the menu SUBSCRIPTIONS / TRANSACTIONS / PAID. See that the transactions can be viewed, and exported, but the transaction can not be cancelled.



Note also that this user does not have access to the ADMINISTRATION menu so that he can not change his access privileges.

User information is tracked for all transaction processing and allows the organisation to create view and edit accesses for almost every function of the system. Committee based Clubs can use the USER function to assign privileges dependant on the committee role. So in some cases, only the Registrar might edit the member’s records, or only the Treasurer has access to the SETTLEMENTS menu.

SECTION 7(5 MINUTES) **THE MEMBER PORTAL**



Log out of the Club and into the State Console. Go to the menu MEMBERS / MEMBERDESQ.



The information in the SUMMARY message appears on the first page of the portal. The WELCOME message appears when an existing member logs into MEMBERDESQ allowing organisations to give instructions to members on which menu to click to renew or update their information, as well as update with important news from time to time.

Note the following settings that can be changed.

Register & Renewal – Do you want your members to be able to register as a new member or renew their membership?

Member Update – Do you want your members to be able to update their personal information?

Password Retrieval – Do you want your members to retrieve their username and password through the portal? Members that share an email address (such as families) will receive an email for each member.

Contact Us – Do you want there to be a contact us form on the portal. This form will be emailed to the email address in ADMINISTRATION / DETAILS

Manual registration option – Do you want your members to be able to fill in the application and then present a cheque which you can go in and mark off in the back of the system?



Ensure that there are no other MEMBERDESQ Portals open. Click the MEMBERDESQ button. This opens a LIVE MemberDesq link.



You will be able to access your organisation's live MEMBERDESQ address from this area when your log ins have been provided.

CONGRATULATIONS! YOU'VE COMPLETED THE "GET TO KNOW" OF THE SYSTEM!

This test system can be accessed at any time. If any areas are unclear, please ensure that you revisit this document and the test system to improve your understanding of the system and to improve your ability to support your affiliated organisations.

If you are part of the rollout team, you should now be well placed to complete the required forms in the Welcome Pack.