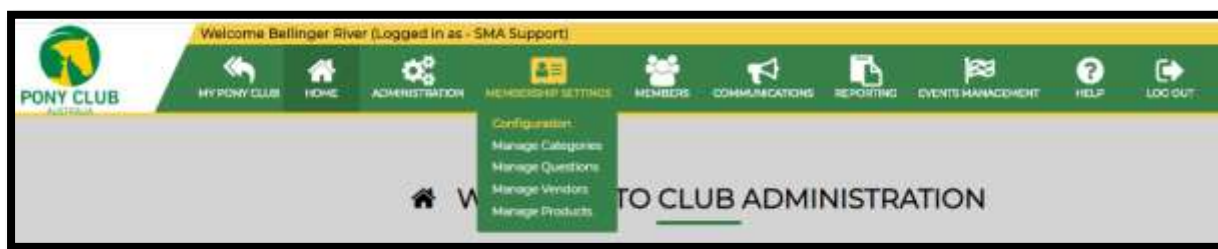


Membership Settings

When you hover over 'Membership Settings' the following option appears:



The Membership Setting Menu allows you Manage the Membership Categories and Manage the Membership Questions. This guide will provide detailed information regarding these menus for the set up of memberships within the My Pony Club system.

MANAGE CATEGORIES

Setting up your club Membership can be done in 3 easy steps:

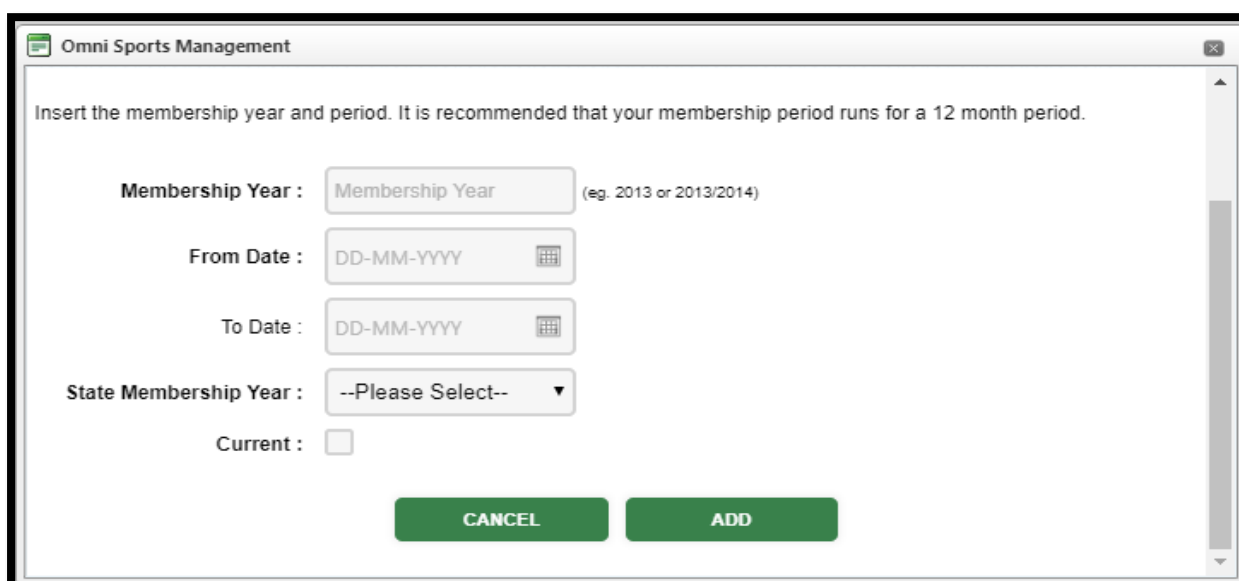
1. Add/edit your Membership Year
2. Add/manage the Fee Categories for the memberships available at your club
3. Add/manage the Membership Categories your club will make available to your members, such as Senior Member, Junior Member, Family Member, Social Member and Student Member

There is also an option to Copy Membership Types to make it easy to Transfer Membership Categories over from one Membership year to another one.



STEP 1 – SET MEMBERSHIP YEAR

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

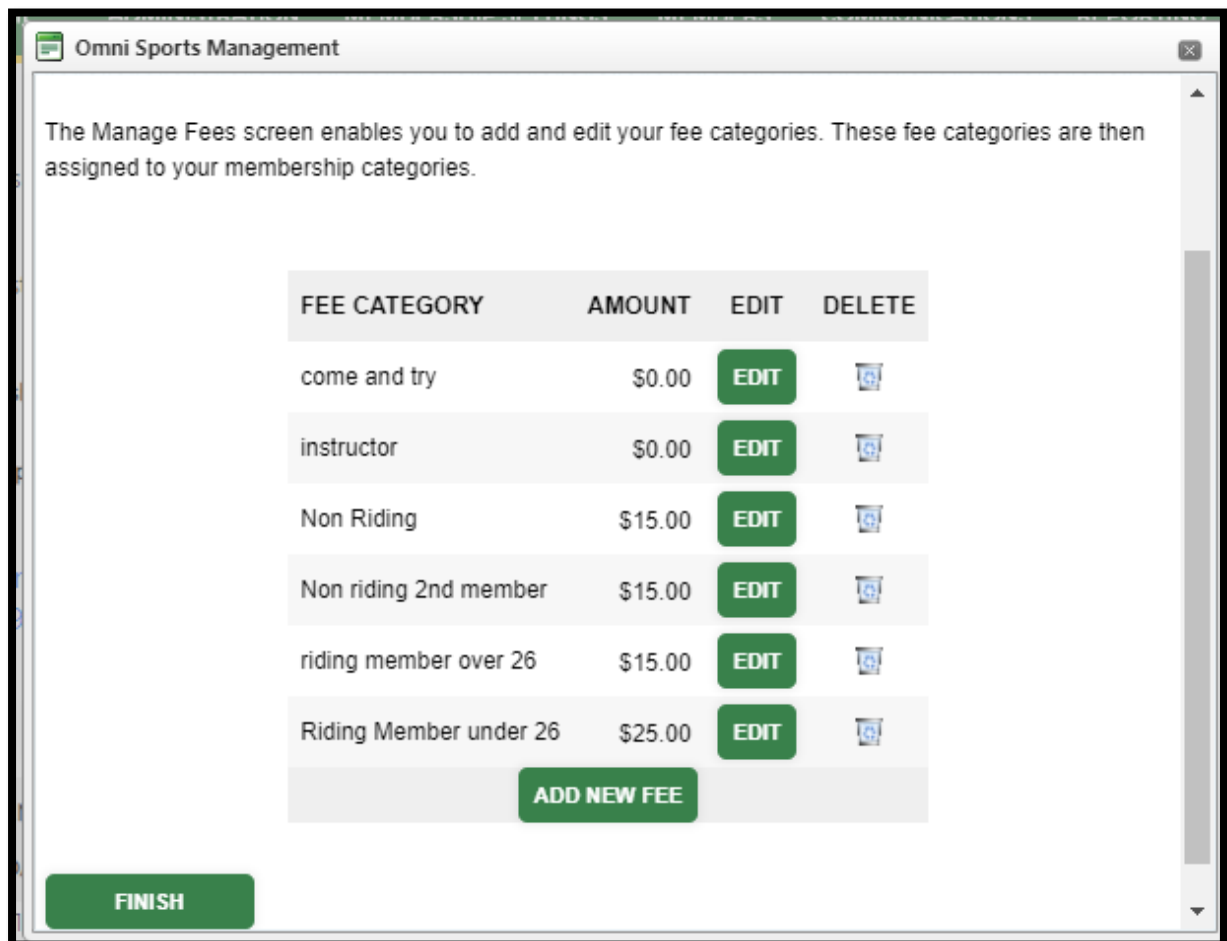


- Enter your membership year (E.g. 2021); the membership year start and end dates eg. Calendar or Financial Year; then select the appropriate State Membership year from the drop-down box
- If you would like to make this year current immediately, tick the Current box (Note: you can edit this at a later stage if required). 'Current' makes the year the default for your Club when viewing information.
- Once Completed, select <Add>
- The Edit Year button is used to place a tick in the Current box if you haven't done so in step 3.

STEP 2 – MANAGING FEES

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

- 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/Bin Icon>
- Once you have added/edited all fees select <Finish>



STEP 3 – ADD NEW MEMBERSHIPS

Note: If your organisation has existing memberships from previous years in My Pony Club you can copy these from year to year. For more details on how to copy memberships please see the 'Copy Memberships' section below.

Membership Details;

- Select the Membership Year from the drop-down box
- Enter name, such as Senior, Junior, Student, Social and the Description if required. Description gives the member 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 State Membership you would like to link to this membership to – for Reporting purposes and to apply the applicable State Fee
- Select the club fee that is charged for this membership type (see the Managing Fees section above)
- Tick Available Online box to allow members to register/renew online. (Note: Your Club has its own registration page where members can renew or register, through the front-end of the system at Members Login Page)
- Tick Active box to make the Membership available within the system for all users (admin and members)

NOTE: both 'Online' and 'Active' must be selected to allow members to register themselves through the system. For memberships that the club would like to manage internally, such as life members, make the membership 'Active' but not online

The screenshot shows a web form for entering membership details. The form is organized into several sections:

- Membership Year:** A dropdown menu with "--Please Select--" and a downward arrow.
- Membership Name:** A text input field.
- Description:** A larger text area for detailed information.
- Membership From Date:** A date picker showing "DD/MM/YYYY".
- Membership To Date:** A date picker showing "DD/MM/YYYY".
- Registration From Date:** A date picker showing "DD/MM/YYYY".
- Registration To Date:** A date picker showing "DD/MM/YYYY".
- Fee Category:** A dropdown menu with "--Please Select--" and a downward arrow.
- is Rolling:** A checkbox.
- Number Of Months:** A text input field.
- Available Online:** A checkbox.
- More Information:** A text input field.
- Voting Rights:** A checked checkbox.
- Active:** An unchecked checkbox.

Below these fields is a section titled **ADVANCED FEE OPTIONS** with a horizontal line separator. It contains:

- Fee Options:** A checkbox labeled "ProRate".

At the bottom right of the form are two green buttons: **CANCEL** and **UPDATE**.

Advanced Fee Options:

- If you are offering Pro-Rata fees for this membership 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 Club 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 Club Committee.
- Click <Update> once certain



The screenshot shows a form titled "PRORATA" with 12 input fields for monthly fees, labeled "Month 1" through "Month 12". Each field contains the value "\$0.00". At the bottom of the form are two buttons: "CANCEL" and "UPDATE".

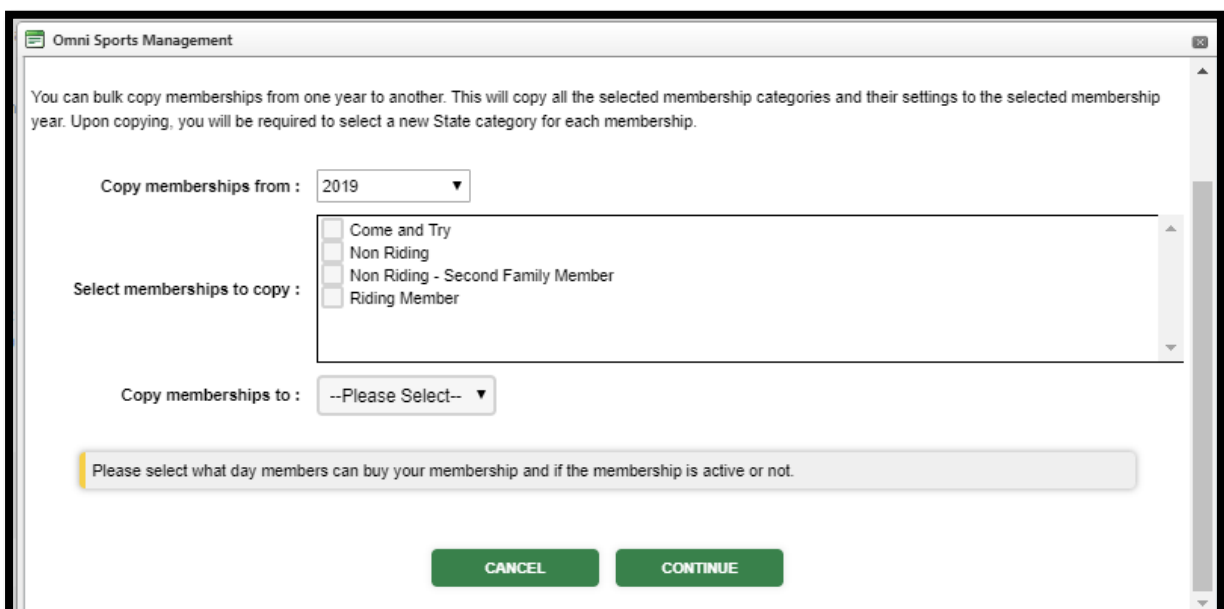
NOTE: You can edit the Registration Date, Online and Active Options at any time by clicking update from the Manage Memberships screen.

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

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**'.

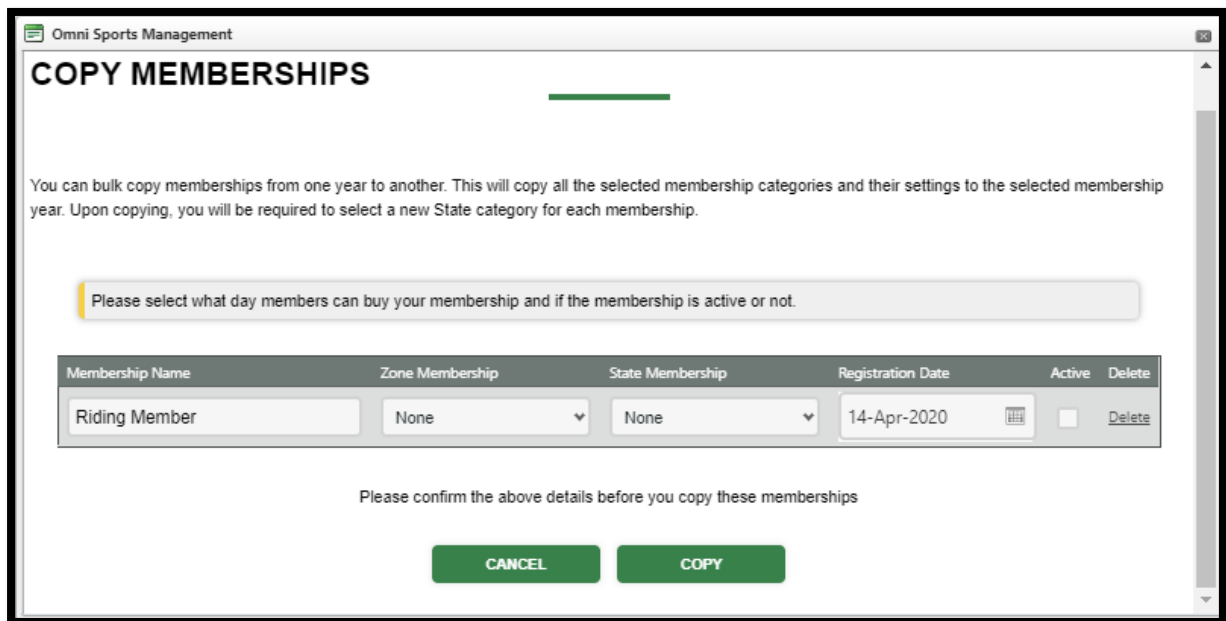
- Click <Copy Memberships> A pop-up box will appear.
- Select the year you would like to copy memberships from eg. 2019
- Tick the membership you would like to copy from the available box
- Select the membership year you would like to copy membership to eg. 2020
- Select <Continue>



The screenshot shows a dialog box titled "Omni Sports Management". It contains the following text: "You can bulk copy memberships from one year to another. This will copy all the selected membership categories and their settings to the selected membership year. Upon copying, you will be required to select a new State category for each membership." Below this text are three main sections: "Copy memberships from :" with a dropdown menu showing "2019"; "Select memberships to copy :" with a list of four membership categories: "Come and Try", "Non Riding", "Non Riding - Second Family Member", and "Riding Member", each with an unchecked checkbox; and "Copy memberships to :" with a dropdown menu showing "--Please Select--". At the bottom of the dialog is a text input field with the placeholder text "Please select what day members can buy your membership and if the membership is active or not." and two buttons: "CANCEL" and "CONTINUE".

Copy Memberships Cont.

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



- Memberships will appear as Inactive, to change to active, just click 'Inactive'. (*Note: Please check all the details of your copied memberships such as registrations date, descriptions and fees before you change your memberships to active*).
- When copying Memberships the membership and registration dates will be the same as the **previous membership year unless edited**. So please ensure these dates are corrected
- To **edit** Memberships select <Update> and follow the steps in Adding New Membership (Step 3 above). From the update screen, you can turn the Online Membership option ON and view the membership page your members will see, just select the link "View my online registration screen" from the update page.
- To activate online memberships, tick the available online button.
- Deleting Memberships If the need to delete a membership arises, open the membership you wish to delete and select the <Delete> button located at the bottom of the screen.

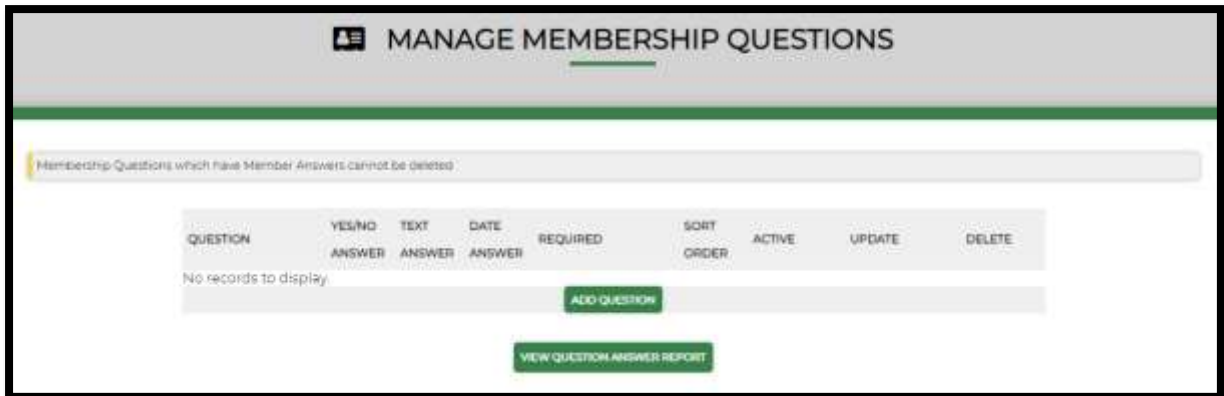
NOTE: Once a Member joins a Membership you will no longer be able to change the Membership Begin and End dates, the Financial Year, State Membership your membership is connected to or the Membership Name.

If you try to delete the membership the following message will appear: Membership has roster records, cannot delete Membership. If required to delete a membership after someone has joined, you will need to contact the Helpdesk.

| MEMBERSHIP NAME | BEGIN DATE | END DATE | REGISTRATION BEGIN DATE | NATIONAL FEE | | STATE FEE | | ZONE FEE | | CLUB FEE | | ONLINE | ACTIVE | UPDATE |
|-----------------------------------|-------------|-------------|-------------------------|--------------|----------|-----------|----------|----------|----------|----------|----------|--------|----------|--------|
| | | | | AMOUNT | PRO DATA | AMOUNT | PRO DATA | AMOUNT | PRO DATA | AMOUNT | PRO DATA | | | |
| Come and Try | 01-Jan-2020 | 31-Dec-2020 | 01-Dec-2019 | \$0.00 | No | \$25.00 | No | \$0.00 | No | \$0.00 | No | Yes | Inactive | UPDATE |
| Instructor riding | 01-Jan-2020 | 31-Dec-2020 | 01-Dec-2019 | \$12.38 | No | \$64.12 | No | \$0.00 | No | \$0.00 | No | Yes | Inactive | UPDATE |
| Non Riding | 01-Jan-2020 | 31-Dec-2020 | 01-Dec-2019 | \$0.00 | No | \$40.00 | No | \$0.00 | No | \$0.00 | No | Yes | Inactive | UPDATE |
| Non Riding - Second Family Member | 01-Jan-2020 | 31-Dec-2020 | 01-Dec-2019 | \$0.00 | No | \$20.00 | No | \$0.00 | No | \$15.00 | No | Yes | Inactive | UPDATE |
| Non riding instructor | 01-Jan-2020 | 31-Dec-2020 | 01-Dec-2019 | \$0.00 | No | \$40.00 | No | \$0.00 | No | \$0.00 | No | Yes | Inactive | UPDATE |
| Riding member over 25 | 01-Jan-2020 | 31-Dec-2020 | 01-Dec-2019 | \$12.38 | No | \$64.12 | No | \$0.00 | No | \$15.00 | No | Yes | Inactive | UPDATE |
| Riding member Under 25 | 01-Jan-2020 | 31-Dec-2020 | 01-Dec-2019 | \$12.38 | No | \$64.12 | No | \$0.00 | No | \$25.00 | No | Yes | Inactive | UPDATE |

Manage Questions

This is the place where a Club Administrator can enter the questions the Club want to have answered by ALL members when they purchase a Club Membership.



Questions are set-up in a few simple steps. First click on <Add Question> which then shows the below pop-up;

1. Question Box: Write down the question you want to have answered by the member
2. Yes/No Box: tick when the answer to the question is just a simple yes/no
3. Text Answer: tick when the answer to the question needs words
4. Date Answer: tick if it is important to register the date the question was answered
5. Sort Order: when the club has multiple questions during the membership purchase process list here in which order this question should be listed
6. Active: tick this box if you want the question to be current straight away. It is possible to leave this box un-ticked one can always come back to it later and tick it. Vice versa too; if the question is no longer important during the Membership Purchase Process this box can be un-ticked
7. Click <Add> once certain