



Setting up Membership 2017

This document provides a summary of the information on how to configure ItsPlainSailing so that you can accept Membership Renewal and New Membership Applications online.

It is divided into 3 main sections as follows:

1. Section 1: Steps for Pony Clubs that have never set up Membership through ItsPlainSailing,
 2. Section 2: Steps for Pony Clubs who collected memberships online in 2016, and
 3. Section 3: Some useful information about using the online Membership in ItsPlainSailing.
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Section 1: Set up Online Membership for the First Time

For those clubs setting up online membership payments for the first time then please follow the instructions below.

Step 1: Add Your Membership Types

The first step is to add the membership types that you support within your club. For most pony clubs there will be two membership types, as follows:

1. Membership Renewal 2017
2. New Member Application 2017

Below we will go through the steps of adding these two types

Step 1.1 Add Membership Renewal Option

To add membership types to your account you should click on **Settings** at the top of the page, and then click on **Membership** on the left hand side of the page. When you do so you will see a screen like the following:

The screenshot shows the 'Membership Settings' page. At the top is a navigation bar with links: Home, Events, Members, Payments, Settings (highlighted), and Help & Support. On the left is a sidebar titled 'ACCOUNT SETTINGS' with links: Personal, Club, Users, Application Forms, Application Fields, Membership (highlighted), Interest Types, and Labels. The main content area is titled 'Membership Settings' and includes a sub-header 'Manage the settings related to your club memberships.' Below this is a 'Membership Settings' box with two fields: 'Membership Functionality: Enabled' and 'Open For Membership: No'. Below the box is a section titled 'Club Membership Types' with a table. The table has columns: Name ▲, Membership Status, Membership Form, Valid Until, Membership Fee, and Action. The first row shows 'None' in the Name column. An orange link 'Add Membership Type' is located at the top right of the table.

Name ▲	Membership Status	Membership Form	Valid Until	Membership Fee	Action
None					

To add a new membership type you should click the orange link on the middle right called **Add Membership Type**, which will display a form where you can fill out the details of the new membership type that you are adding.



Club Membership Types

Add New Membership Type

Membership Type Details

Please provide a name and description for this new membership type, and please select the Membership Form to use. Also, if this membership is for existing members renewing then please select Yes for **Add Membership Number** which will add the Membership Number field automatically to the application form.

Name: 2015 Membership Renewal

Description: Existing members please use this option to renew your membership.

Membership Form: Standard Membership Form

Add Mem. Number To Form: Yes

Membership Status: Open

Valid Until: 2015-12-31

Automatically Approve Applications: Yes

Payment Details

Please provide the membership fee and select payment options available to your members

Membership Fee: 100.00

Allow Pay By Credit Card: Yes

Handling Fee Included: No

Allow Pay By Cheque: Yes

Cheque Payment Instructions: Please make cheques payable to XYZ and post them to ABC

Group Membership Option

If this is a Group Membership (e.g. Family Membership) then please select Yes below, and then indicate the maximum number of members that are allowed in this Group Membership

Group Application: No

Add Terms And Conditions

Optionally you can add terms and conditions which the user must agree to when submitting their application.

Use Terms and Conditions: Yes

Terms and Conditions: I/ We will respect the rules and procedures set down in the Irish Pony Clubs Code of Ethics for Childrens Sport (see www.irishponyclub.ie/code-of-ethics.html). I/ We will respect branch members, branch officials, instructors, all officials and members throughout the organisation. I/ We will encourage our child to treat other participants, instructors, selectors, officials with respect. I/ We will respect the officials and their authority during rallies, camp, competitions and at all Pony Club activities. I/ We will never demonstrate threatening or abusive behaviour or use foul language. I/ We will respect and encourage our child to respect the rights and needs of all animals. I understand the IPC Use of Photographic & Film Equipment Guidelines (available on www.irishponyclub.ie) and hereby give permission for a photograph of my child to be published in a publication approved by the Irish Pony Club and our Branch website. I/ We have read the Code of Code and the Aims and Rules of the Irish Pony Club and I/ We approve of our childs membership.

Add **Cancel**

The screenshot above shows the form with the fields already filled out. In this case it shows an example of what the “Membership Renewal 2017¹” form might look like. I have tried to explain what each field is used for below.

Name: enter here the name of the membership type as you would like it to appear to your members on your clubs online entries page.

¹ The screenshot above says 2015 but you should use 2017.

² Note: The screenshot above says 2015 but remember to use 2017.



Description: enter here some description text about this particular membership type, this text also will be shown to your members on your clubs online entries page.

Membership Form: This is the membership application form that needs to be filled out by your members. In this case the Standard Membership Form is used.

Add Mem. Number To Form: Set this to Yes for Membership Renewals and it will make sure that an "Membership Number" field is automatically added to the Membership Form so that you can capture the existing membership number of renewing members.

Membership Status: This field is used to mark membership open or closed, we set it to as open in the case.

Valid Until: This is the date that all members renewing will have their membership valid until. So since we are setting up membership renewal for 2017 you should set this to 31/12/2017.

Automatically Approve Applications: Every membership application is stored in your clubs central database with a member status that is either "Active" or "Pending". If you set this field to Yes then all members renewing their membership using this Membership Type will have their member status automatically set to Active. If you set this to No then members renewing their membership using this Membership Type will have their member status set to "Pending". In this case it is up to a person on the branches committee to review the pending memberships and mark them as active manually. In this case because it is a renewal of an existing membership we have set this to Yes, however if your club policy is to review all applications before accepting them then set this is No.

Use Terms And Conditions: If you would like to specify terms and conditions in the Membership Application form then set this to Yes. When you select this option as Yes a default set of terms and conditions will appear in the box underneath for you to view/ edit.

Membership Fee: You should set this to the fee that the person must pay when submitting a membership application for this membership type. In this case it is set to 100 Euro.

Allow Pay By Credit Card: Set this to Yes to enable the choice to pay by credit card. Note: If a club is not activated for Credit Card payments then this option will not be displayed.

Handling Fee Included; If Allow Pay By Credit Card is set to Yes then you should indicate here whether the Credit Card Handling Fee is included in the Membership Fee (set to Yes), or if the Credit Card Handling Fee is added on top of the Membership Fee (set to No). In this case we set it to No as the parent will pay the credit card handling fees if they use this option to pay.

Allow Pay By Cheque: You may also give people the option to pay by Cheque by setting this to Yes, otherwise set it to No. NOTE: Since the credit card handling fee can be quite high, the bigger amount of money being paid we recommend that for Membership Fees that you give parents the option to pay by cheque. So the credit/ debit card handling fee on an entry of 20 Euro might be quite small, however if a



parent is renewing membership for a couple of children then the handling fees can get quite high so it is always good to give the option to pay by cheque in this case.

Cheque Payment Instructions: If Allow Pay By Cheque is set to Yes then you must provide instructions on who the cheque is to be made out to and where the cheque should be sent. This information is automatically added to the Confirmation email sent to people when they submit their application.

Group Application: Please leave this field set as No.

When you have filled out all the fields you should click add to add the new membership type.

Step 1.2 Add Membership Type for New Member Applications

In a similar manner to the previous step you should click the orange link on the middle right called **Add Membership Type**, which will display a form where you can fill out the details for your New Members applications. The screenshot below shows an example of how this might look.



Add New Membership Type

Membership Type Details

Please provide a name and description for this new membership type, and please select the Membership Form to use. Also, if this membership is for existing members renewing then please select Yes for **Add Membership Number** which will add the Membership Number field automatically to the application form.

Name:

2015 New Member Application

Description:

If you are not a pony club member, you live in the XXXX area and you would like to apply for pony club membership then please use this option to submit your application.

Membership Form:

Standard Membership Form

Add Mem. Number To Form:

No

Membership Status:

Open

Valid Until:

2015-12-31

Automatically Approve Applications:

No

Payment Details

Please provide the membership fee and select payment options available to your members

Membership Fee:

100.00

Allow Pay By Credit Card:

Yes

Handling Fee Included:

No

Allow Pay By Cheque:

Yes

Cheque Payment Instructions:

Please make cheques payable to XYZ and post them to ABC

Group Membership Option

If this is a Group Membership (e.g. Family Membership) then please select Yes below, and then indicate the maximum number of members that are allowed in this Group Membership

Group Application:

No

Add Terms And Conditions

Optionally you can add terms and conditions which the user must agree to when submitting their application.

Use Terms and Conditions:

Yes

Terms and Conditions:

I/ We will respect the rules and procedures set down in the Irish Pony Clubs Code of Ethics for Childrens Sport (see www.irishponyclub.ie/code-of-ethics.html). I/ We will respect branch members, branch officials, instructors, all officials and members throughout the organisation. I/ We will encourage our child to treat other participants, instructors, selectors, officials with respect. I/ We will respect the officials and their authority during rallies, camp, competitions and at all Pony Club activities. I/ We will never demonstrate threatening or abusive behaviour or use foul language. I/ We will respect and encourage our child to respect the rights and needs of all animals. I understand the IPC Use of Photographic & Film Equipment Guidelines (available on www.irishponyclub.ie) and hereby give permission for a photograph of my child to be published in a publication approved by the Irish Pony Club and our Branch website. I/ We have read the Code of Code and the Aims and Rules of the Irish Pony Club and I/ We approve of our childs membership.

Add

Cancel

The second time around we use a lot of the same options as we did in the previous step with the following differences.

Name: We enter the name New Member Application 2017² so that it is clear for whom this application applies.

Description: we enter a description again, which makes it clear who should be using this membership type.

Add Mem. Number To Form: we set this to No because the application form is for new members who don't already have a membership number.

Automatically Approve Applications: You might set this to No because new applications need to be reviewed and approved before they are accepted into your club and marked as.

² Note: The screenshot above says 2015 but remember to use 2017.



Step 2: Open membership for your club

By default the membership status for your club is set to closed. If you would like the membership to be open for your club so that you can accept online entries then you need to set Membership Status to **Open** (see figure below).

Home Events Members Payments **Settings** Help & Support

ACCOUNT SETTINGS
Personal
Club
Users
Application Forms
Application Fields
Membership
Interest Types
Labels

Membership Settings

Manage the settings related to your club memberships.

Membership Settings

For those fields you have permission to edit you can hover over the field value below and then click the displayed edit icon.

Membership Functionality: Enabled Open For Membership: ☒ No ☐ Yes

Club Membership Types [Add Membership Type](#)

Name ▲	Membership Status	Membership Form	Valid Until	Membership Fee	Action
2015 Membership Renewal	Open	Standard Membership Form	2015-12-31	100.00	View - Delete
2015 New Member Application	Open	Standard Membership Form	2015-12-31	100.00	View - Delete

When you have added your membership types and set your membership status to Open then the public online entries page for your club should look something like the following where your membership options are now available to your members to select and apply.

Its Plain Sailing Hunt Pony Club 0 Check Out

Welcome to the Hunt Pony Club Online Application & Payments Page

The table below lists all open events and memberships for the Laois Hunt Pony Club. Click the link in the column on the right to submit your application. Alternatively to go directly to the checkout page click on the **Check Out** link above on the top right.

Name	Description	Status	Click Link Below to Submit Application
2016 Membership Renewal	Form for existing members to renew sub 2016	Open	2016 Membership Renewal
2016 New Member Application	Application form for those wishing to join Laois Pony Club in 2016	Open	2016 New Member Application
Rally Voucher Discount Packages (Thu 31st Dec, 2015)	Rally Packages	Closed Applications Closed: Wed 30th Sep, 2015 at 00:00:00	Sorry Closed For Applications



Section 2: Steps for Existing Clubs Using Online Membership

For those clubs who are already using the online membership functionality please make the following changes to your current set up.

Update your Existing Membership Types

Log into your ItsPlainSailing account as Administrator go to Settings -> Membership.

For each of your Club Membership Types listed in the table click the View button and edit them as follows:

- Change the name to indicate that it is for 2017
- Change the description if it refers to 2016.
- Edit the field "Valid Until" and set it to 31/12/2017
- That should be it but you might want to check the rest of your fields (e.g. make sure the membership fee is correct for the coming year, you might want to make sure Pay By Cheque is an option, that your T&Cs are correct...).

Repeat this process for each of your membership types.

That should be it for existing Clubs using the online membership functionality.

Note: on the 31st December 2016 (or on an agreed date), all members in the database who have not renewed for 2017 will automatically have their Membership Status set to "Elapsed".



Section 3: Other Points of Note

Other things that might be useful to know.

Allow Pay By Cheque Also

NOTE: Since the credit card handling fee can be quite high, the bigger amount of money being paid we recommend that for Membership Fees that you give parents the option to pay by cheque. So the credit/debit card handling fee on an entry of 20 Euro might be quite small, however if a parent is renewing membership for a couple of children then the handling fees can get quite high so it is always good to give the option to pay by cheque in this case.

Reduced rates for more than one child in family

If your club offers options for membership where the 2nd, 3rd etc. child in a family gets a reduced membership fee then you can do this by setting up more membership types, for example:

1. Membership Renewal 2017 (1st Child In Family) – with a fee of 100 Euro
2. Membership Renewal 2017 (2nd and subsequent Child In Family) - with a reduced fee
3. New Membership Application 2017 (1st Child In Family) – with a fee of 100 Euro
4. New Membership Application 2017 (2nd and subsequent Child In Family) - with a reduced fee

Closing membership for Individual Membership Types

You have the option if required to close individual membership types while leaving others open. So for example if you wanted to close membership for New Applications while still leaving membership open for renewing members, then you might edit the individual Membership Type for 2017 New Member Applications and set the Membership Status field to Closed.

Email Notifications

When a person submits a membership application, a confirmation email is sent to the email address of the person who applied. A notification email is also sent to the email address of the Membership Secretary within the club. For this to work you must go to Settings -> Club and make sure that the **Membership Secretary Email** address field is set correctly for your club (see screenshot below).




Home Events Payments **Settings** Activate Help & Support

ACCOUNT SETTINGS

- Personal
- Club**
- Users
- Application Forms
- Application Fields
- Membership
- Interest Types
- Labels

Club Settings

Club Name:	Our Club	Abbreviated Name:	ours
Club Web Site:	www.ourclub.com	Club Type:	Not For Profit Charity
Contact Name:	John Smith	Subscription Type:	Yearly Fee (120 Euro) Paid by Cheque In Advance
Contact Email:	ourclub@gmail.com		
Contact Number:	0872363332		
Entries Secretary Email:	ourclubsecretary@gmail.com		
Membership Secretary Email:	ourclub@gmail.com		

Club Logo: 

Default T&Cs: We ask all people participating in our club activities to make sure that they are familiar with and adhere to the Irish Pony Clubs code of conduct which can be found at the following link: <http://www.irishponyclub.ie/code-of-conduct.html>

Pay By Cheque = Pending

If a member pays by cheque for their membership renewal, then by default their membership status is set to **Pending**. The idea is that when the payment is actually received you can mark them **Active**.

Automatically Approve Applications - New Member Applications

The other way that a members status can be set to Pending is if you set the field **Automatically Approve Applications = No**, for the membership type that the person selected from your clubs online entries page. It is usual that for New Membership Applications you would set this to No so that the new members membership is Pending until the membership secretary has reviewed it and approved it. In this case, when the membership secretary of the branch is happy with the new application you can then set the status to Active manually.

Automatically Approve Applications - Existing Members Renewing

For existing members renewing it is usual to set **Automatically Approve Applications = Yes**, in your membership type definition so that when the renewal payment is made by credit card the member is marked as Active automatically.

Payments -> Cheques

In case you have not seen it, under the section Payments you will see the option Cheques on the left hand side of the screen. When you select this option you will see a list of all membership applications/entries where the person chose to pay by cheque. You will also see a link on the right of each row called **Mark Received**, you can use this to mark cheques as received which can be useful to keep track of the payments as they come in.

Receiving Paper Based Membership Renewal

If you have to process a membership renewal for an existing member where it was not done on line, i.e. the parent handed you the old application form filled out, then we suggest that you do the following:



- (1) Log into the ItsPlainSailing system and select the members option on the top.
- (2) By default you will see "All Current" members listed on the screen. For this paper based renewal you will want to find the old record for this member to update it. To do this you need to add a filter to display old member records, if you do not already have one there. To add a filter the steps are as follows:
 - (2.1) Click the Add New Filter link on the left middle of the page.
 - (2.2) In the screen that is displayed, enter "All Members Ever" in the "Filter Name" field and enter something like "A listing of all membership records for our club including old and deleted" in the "Filter Description" field.
 - (2.3) Then in the field "Membership Status" remove the states "Pending" and "Active" by clicking the small x to the left of their particular name.
 - (2.4) When this is done click the add button in the bottom right.
 - (2.5) You should now see a new filter on the left called "All Members Ever".
- (3) If you click this new filter the display on the right will update to show all members including ones with their membership elapsed.
- (4) You then want to find the record for this member who is renewing now. To do this you should click the text box underneath the first column in the table called "Mem. Num." and type the full membership number of the person renewing. When you have typed the number if you wait a second the screen will refresh to list the member in the database that has that number (assuming it exists).
- (5) What you want to do now is update this record with the information that you have received in the paper based membership application form, i.e. set the members status from Elapsed to Active, and then also set their Valid Until date to 31/12/2017. To do this you can do as follows:
 - (5.1) Click the "View" link on the right most column of the table for the member in question which will load up the full member record for your to edit.
 - (5.2) Hover over the Membership Status field value and click the small edit icon which displays on the right hand side. This makes the field editable, so click on the drop down list and change their status to Active, and then click the small checkbox icon underneath to save your changes.
 - (5.3) Likewise hover over the date value for the Valid Until field, click the edit button and move the date forward to 31/12/2017, and save that.
 - (5.4) Then you should check the other fields for that member (e.g contact number, contact email, pony name), and if they are empty or incorrect then get the correct values from the paper application form and fill them in in the same way (hover over the field value/ click the edit icon...).

Receiving A Paper Based Application for New Membership

If you have to process an application for new membership which came in the old way with the paper application form then you should do the following:

- (1) Log into the ItsPlainSailing system and select the members option on the top.
- (2) Click the "Add Member" link above the table on the right.
- (3) Fill out all the fields of information for the new member which should come from the paper application form.
- (4) Make sure you set Valid Until to 31/12/2017 and Membership Status to Active, and select the correct Membership Type for the person (i.e. New ...).
- (5) When you have filled out all the information click the Add button on the bottom right to add the new members data to the database.



Note: in this case the new member will be automatically allocated a new membership number (the next in sequence).