

revSPORT Onboarding guide

Welcome to revSPORT! This guide provides a summary of the core functionalities of the platform and the steps required to enable registrations for your club.

1. Logging into your portal

Your login details would have been issued via email and we recommend saving these details to your browser so they can be pre-filled moving forwards. It is also best to bookmark your portal link in your browser.

Your username will not be your email address and is based on:

1. Your first name's initial;
2. Your surname, and;
3. A number (if required).

If you have issues logging in, you can click the **forgot login details** option to issue yourself a password reset email. Once your login details have been changed, you will need to update the details saved to your browser if the pre-fill still uses the old, now invalid details.

If you can't find your portal link, your revSPORT website contains a link to your portal in the footer via the **For admins** button.

2. Confirm your Account details are correct

Your basic account details will have likely been created by your parent body so you will need to ensure they are still correct. To do this, go to **Account** (located in the top-right of your portal) > **account details**.

Here, you can update your name, contact details and address where necessary. You can also upload your logo, which appears on your website and all invoices, and set up automated email notifications when actions are taken through your website, such as member registrations or shop purchases.

3. Creating additional registration fields

Additional fields, located in **Members > settings**, is where you customise your registration form and refer to the information that you want to collect from members at the point of registration.

By default, the system will ask for each member's:

- Basic details (name, DOB);
- Contact information (phone number, email), and;
- Address details.

So you don't need to create additional fields for these. However, aside from these, you have full flexibility to collect any kind of information from members with their online registration. To make the process of data collection as efficient as possible, you also have a range of **types** you can utilise to capture the data. These include:

- **Text input (1 line)** – allows members to type out their own, small response
- **Text input (multiple lines)** – as above, but used when longer responses are required
- **Dropdown** – lets you configure which exact responses members can choose from
- **Checkbox (single)** – a variation on the dropdown
- **Checkbox (multiple)** – allows multiple options to be selected
- **Date** – the field is completed by selecting a specific date
- **File upload** – a file is uploaded for the field

As an example, a Yes or No question is best set up as a *dropdown* since, with a *text input* field, one member may respond “yes”, another “yeah” and another “maybe”, affecting the data in your account. Setting the field as a dropdown ensures uniformity across the answers members submit.

Typical fields utilised by our sports include:

- Emergency contact information
- Medical conditions and treatment plan
- If members are interested in coaching/volunteering
- WWCC information
- Occupation
- How the member heard about the club

Lastly, these fields can be set as optional or mandatory in **Site > settings > Member information fields**.

4. Customising your welcome email

Also found in **Members > settings**, your *Welcome email* is an automated email that goes out to members when they complete their registration. The information to include here is essentially what you want members to see or direct themselves to when they join your club.

This might be some history of your club or links to your website that may direct members to your upcoming events, to register another member (i.e as a parent) or to your club's *About* page.

The information in the welcome email will also include that of your parent bodies, so your national and your state bodies welcome information will be included in yours.

If more specific information needs to be sent to different types of members (e.g life members vs playing members), you can also customise a welcome email on a per-payment class basis that will send instead of the standard welcome email you create in **Members > settings**.

5. Adding payment classes

Payments classes are your membership types. They are both how you want to categorise your members and charge the necessary fees for joining your clubs. Payment classes are created in **Finance > payment classes > add payment class**.

How you structure your payment classes is based on your membership model. Some sports will simply have "Adult" and "Junior" memberships, whilst others break these down further by having "Under 18s", "Under 16s" and so on.

Commonly, most clubs will also have:

- A \$0 "Admin" payment class
- A "Life member" payment class
- "Supporter" and "Volunteer" memberships

With regards to your options when creating a payment class, the main ones are the **amount** and the **capitation fee**.

The amount is the club fee you want to charge, not an overall total that includes the state and national fees. State and national fees are handled via the **capitation fee** option which is how you link your fees to those of your parent bodies (e.g how to link your "Adult" payment class to your state's).

This ensures that members pay one invoice when registering, which includes club, state and national fees and they are marked as a paid member of those payment classes at each level.

Payment classes can also have a range of eligibility restrictions applied to them. The main one is minimum and maximum age requirements, and these ensure that members aren't registering into payment classes they aren't eligible for. A "Junior" membership will commonly have the maximum age set to 18, for example.

6. Setting up online payments

Online debit and credit card transactions are possible in revSPORT via our integration with Pin Payments, a payment provider based in Melbourne. The main benefits that this integration offers are:

- Having invoices reconcile automatically and at all levels
- Automatically issue invoice receipts at the point of payment
- Automatically split payments into bank accounts across all levels of a peak system
- Perform refunds via your revSPORT account
- Option to make payment mandatory at the point of registration (to take the stress and time out of chasing up unpaid invoices)
- Ultimately help save admin time that could be better spent elsewhere

As an online payment provider, transactions processed via Pin Payments will incur a transaction fee at a rate of 2% + \$1.60. With these fees, you can either on-charge them to members or absorb them and most sports now absorb the fees and incorporate them into their costs.

To enable Pin Payments, go to **Finance > settings > Accepted payment methods > enable Pin Payments**. Here you will submit a form containing all the relevant details that reflect Pin Payments' 'Know your customer' guidelines, which is their commitment to ensuring security for online transactions.

As per the above, some resources will be required to submit the form and the requirements are based on your **Incorporation status**. Examples of what you may need to submit include:

- ABN
- Personal identification
- Bank statement
- Constitution
- Meeting Minutes

Summary

This is a summary of the functionalities covered in the training and once set up, there are more advanced options that you can explore to further ease the administrative workload required to manage your club and provide the best possible experience for your members submitting online forms.

For more information on those options or any other enquiry that you may have, please don't hesitate to contact our team by going to **Help > ask for help** in your account.