

revSPORT Onboarding guide (Steps only)

Thank you for attending an onboarding session with revSPORT to help get your club set up to take registrations. This guide details the steps to set up the functionalities we worked through during the session.

1. Logging into your portal

If you haven't bookmarked your portal link or can't locate it, your revSPORT website contains a link to your portal in the footer via the **For admins** button. You can also contact our support team for the link.

If you have issues logging in, you can click the **forgot login details** option to issue yourself a password reset email.

2. Confirm your account details

Firstly, go to **Account** (located in the top-right of your portal) > **account details** and ensure your information is accurate. This includes your club's name, contact details and address, for example. You can also upload your logo here.

3. Creating additional registration fields

Additional information fields are located in **Members > settings** and this is where you customise your registration form.

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. Here, you can customise the content that members receive in this email.

5. Adding your payment classes

Payments classes are your membership types and are created in **Finance > payment classes > add payment class**.

With regards to your options when creating a payment class, the main ones to address are the **amount** (that your club wishes to charge) and the **capitation fee**.

6. Setting up Online payments

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.

Summary

This is a summary of the steps required to set up registrations for your account. For more information on these points, we have also created a guide that elaborates on these functionalities to provide further details and examples.

For more information, please don't hesitate to contact our team by going to **Help > ask for help** in your account.