

BowlsLink

Club Administrator Training Manual

Version 1



BOWLSLINK



BOWLS
NEW SOUTH WALES

Contents

- 3.....Membership
- 3.....Members
- 3.....Adding a Member
- 6.....Active Members
- 8.....Pending Members
- 10.....Archived Members
- 11.....Member- Detailed View
- 11.....Activity
- 11.....Details
- 14.....Groups & Categories
- 15.....Member Groups
- 16.....Certifications
- 17.....Email Campaigns Channels
- 18.....Archive Member
- 19.....Request Transfer
- 20.....Account
- 20.....Notes

This user manual will give you an overview of all functionalities that can be performed by a Club Admin and where these can be performed.

Membership

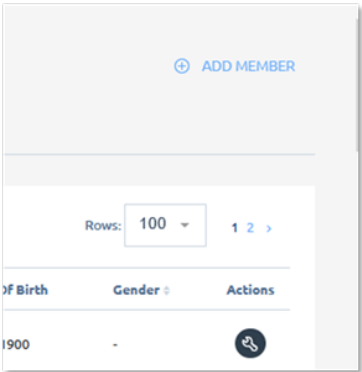
In the membership section of BowlsLink you will be able to find all information related to members of your club. The membership section is further divided into members, groups & categories, certifications and transfers.

Members

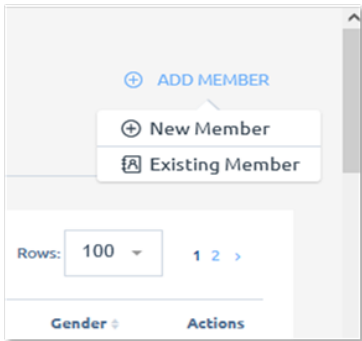
When you are in the members section you will be provided with a list of all the members currently in your club. You will also be given the functionality to add new members. The list is divided into three sections (tabs)- active, pending and archived. For each member listed here you will be able to retrieve further information by clicking on their name.

Adding a new member

You can add a new member using the add member button on the top right



Select the New Member option



You will be asked to provide information on a number of screens. The first asks for:

- First Name
- Last Name
- Email Address
- Mobile Number
- DOB

These details are used to sup login access to the system, emails and mobile numbers must be unique.

A screenshot of the 'Add Member' form. The form has a title 'Add Member' and a subtitle 'Please enter the new member's personal information'. It is divided into sections: 'Personal Details', 'Password', 'Address', 'Club Details', 'Additional Club Details', and 'Terms & Conditions'. The 'Personal Details' section is active and contains fields for 'First Name*', 'Last Name*', 'Email Address', 'Mobile Number', 'Birth Day*', 'Birth Month*', 'Birth Year*', and 'Gender'. A 'NEXT' button is at the bottom.

You will be asked to set a password.
This password should be reset the first-time members log in.

Password must:

- Have 8 characters
- Contain a capital
- Contain a number

Once they match you can continue.

Add Member *Savage Bull*

✓ Personal Details **2 Password** 3 Address 4 Club Details 5 Additional Club Details 6 Terms & Conditions

Password *Please select a strong password*

Password

☐ Must contain at least 8 characters
☐ Must contain at least one capital letter
☐ Must contain at least one number

Re-enter Password

☐ Password must match

NEXT **BACK**

When the passwords match you will get the green lights

Add Member *Savage Bull*

✓ Personal Details ✓ **Password**

Password *Please select a strong password*

Password

✓ Must contain at least 8 characters
✓ Must contain at least one capital letter
✓ Must contain at least one number

Re-enter Password

✓ Password must match

NEXT **BACK**

Next add the members address
This should include:

- Address
- Suburb
- State
- Postcode
- Country

Add Member *Savage Bull*

✓ Personal Details ✓ Password ✓ **Address** 4 Club Details 5 Additional Club Details

Address *Please enter the member's home address.*

Address Line One

Address Line Two

Address Line Three

Suburb State Postcode

Country

NEXT **BACK**

The Club Details will allow you to set when the member is financial to and when they joined your club.

The screenshot shows the 'Add Member' form for 'Savage Bull'. The progress bar at the top indicates that 'Personal Details', 'Password', and 'Address' are completed, and 'Club Details' is the current step (4). The 'Club Details' section prompts the user to 'Please enter the member's Club information.' It contains two text input fields: 'Financial Until' with the value 'Thu, Jun 30th 2022' and 'Member Since' with the value 'Thu, Jul 1st 2021'. At the bottom are 'NEXT' and 'BACK' buttons.

Additional Club details, are where you can enter any additional questions the club has on the system

The screenshot shows the 'Add Member' form for 'Savage Bull'. The progress bar indicates that 'Personal Details', 'Password', 'Address', and 'Club Details' are completed, and 'Additional Club Details' is the current step (5). The 'Additional Club Details' section prompts the user to 'Additional Details requested by the club.' It contains a text input field with the value 'test*', another text input field with the value 'test', and a 'Resume:' section with a 'Browse...' button and the text 'No file selected.' At the bottom are 'NEXT' and 'BACK' buttons.

The Terms and conditions are saying that you have the members permission to put their details into the system

The screenshot shows the 'Add Member' form for 'Savage Bull'. The progress bar indicates that 'Personal Details', 'Password', 'Address', 'Club Details', and 'Additional Club Details' are completed, and 'Terms & Conditions' is the current step (6). The 'Terms & Conditions' section prompts the user to 'Please review and accept the terms and conditions.' It contains a text input field with the value 'Please review the Terms and Conditions at Bowls Australia's website', a checkbox labeled 'I agree to the terms and conditions above.' which is checked, and 'ADD MEMBER' and 'BACK' buttons at the bottom.

Active Members

In the active tab of your members list you will be able to see all members that are currently active. You will also be given some of their member details without clicking into their profile and you will be able to perform the following actions:

The initial screen will give you an overview of your active membership

You will be able to see:

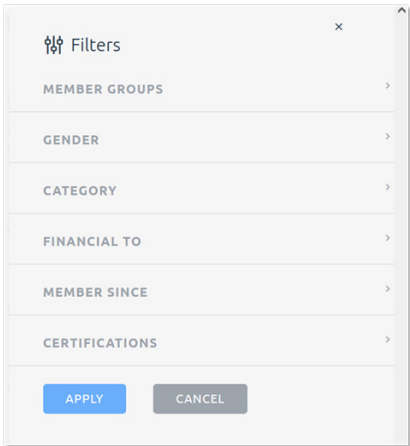
- Last name
- First name
- Membership Number (NIN)
- Category
- Certifications
- Playing rights indicator
- Financial until date
- Member Since Date
- Club
- DOB
- Gender

On the far right is an actions button, that allows you to perform some actions on the member.

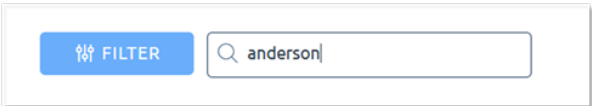


You can use the filter button to filter members by:

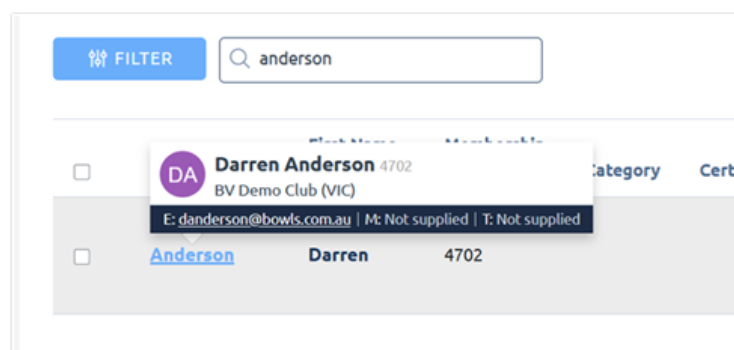
- Member groups
- Gender
- Category
- Financial Date
- Member since date
- Certifications



You can also use the search function to find specific members.



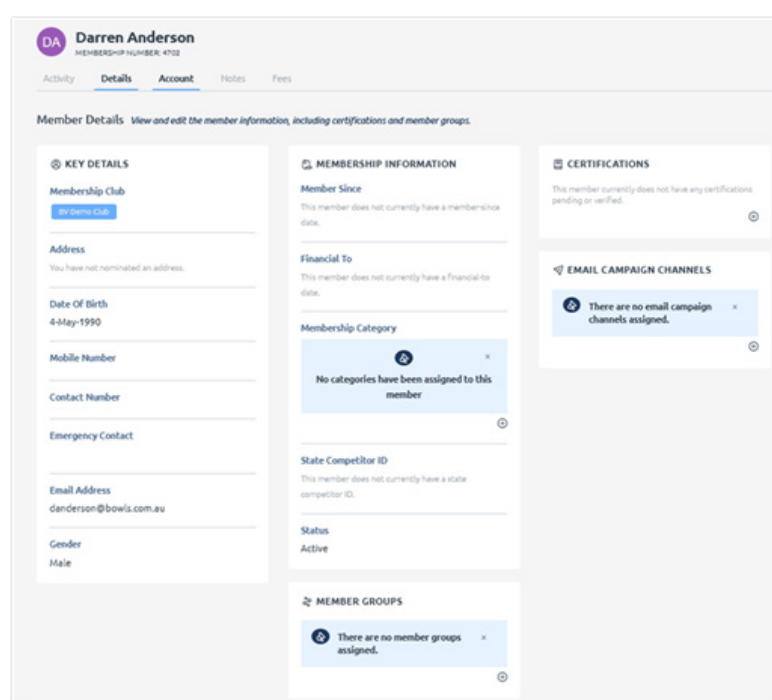
Hovering the mouse over a name will provide a box with contact information.



Clicking on a name will provide you with a detailed screen of the members information

This is broken into:

- Key details
- Membership information
- Member groups
- Certifications
- Email campaign channels



Pending Members

In the pending tab of your members list you will be able to see all members that are currently pending review. As per the active member list, you will be given some of their member details without clicking into their profile. Many functions work the same as in the Active members tab.

Any member you add to the system will go directly to the Pending tab to be approved.

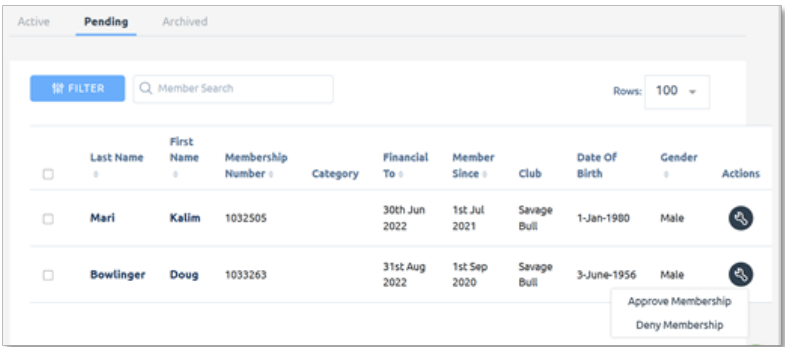
The similar functions are:

1. You will be able to click onto the club members' name to retrieve additional information about this member.
2. You will be able to sort the list of members differently by clicking on the different column headers.
3. You will be able to search for a particular member by name.
4. You will be able to apply specific filters to only find members matching your search criteria.
5. You will be able to change the amount of rows displayed in your member table.

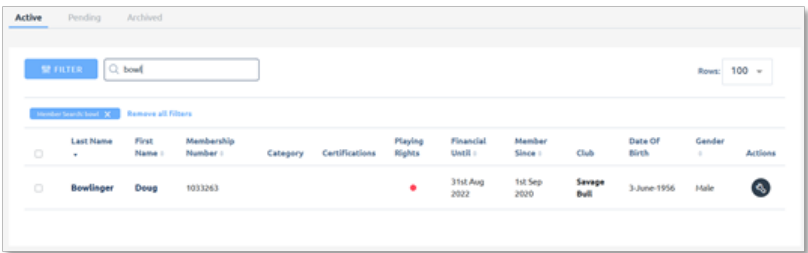
You will be able to perform additional actions for individual members. The Additional actions are:

1. Approve Membership- You will be able to approve the membership for the selected member.
2. Deny Membership- You will be able to deny the membership for the selected member.

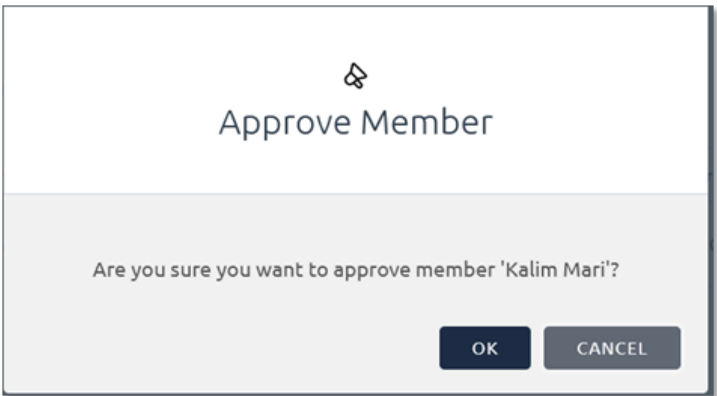
3 To approve or deny the membership, you can use the action button on the far right. Clicking this will bring up the options for you.



4. Then select the option you want. If you approve the member will be moved to your active list. If you deny the member will be removed from your pending list.

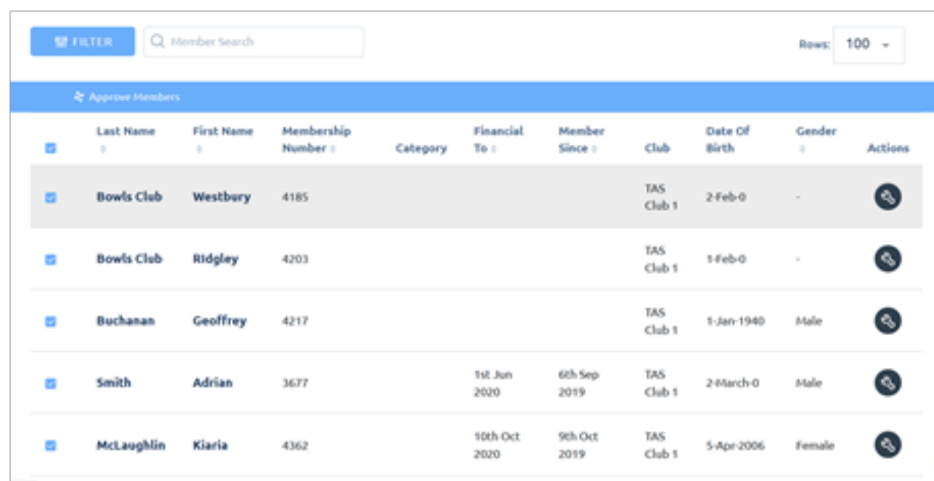


5. You will be prompted to agree to the action you are taking.



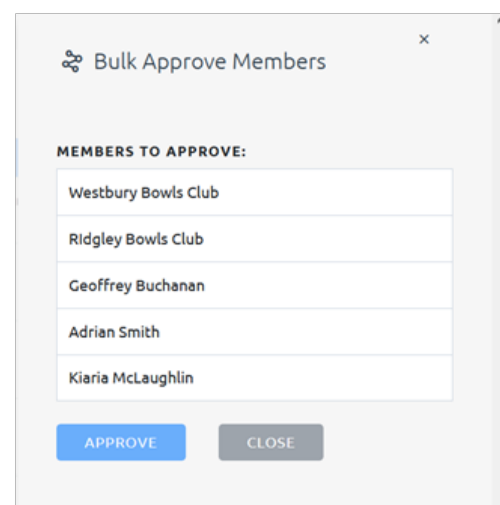
6. You can also bulk select (all or a select group of members) to approve memberships:

To perform a bulk action, use the boxes next to people names to select groups, or the box to the left of the words last name to select everyone on that page. This will make the bulk action bar appear, for there you can select the approve all



| <input type="checkbox"/> | Last Name | First Name | Membership Number | Category | Financial To | Member Since | Club | Date Of Birth | Gender | Actions |
|-------------------------------------|------------|------------|-------------------|----------|---------------|--------------|------------|---------------|--------|---------|
| <input checked="" type="checkbox"/> | Bowls Club | Westbury | 4185 | | | | TAS Club 1 | 2-Feb-0 | - | |
| <input checked="" type="checkbox"/> | Bowls Club | Ridgley | 4203 | | | | TAS Club 1 | 1-Feb-0 | - | |
| <input checked="" type="checkbox"/> | Buchanan | Geoffrey | 4217 | | | | TAS Club 1 | 1-Jan-1940 | Male | |
| <input checked="" type="checkbox"/> | Smith | Adrian | 3677 | | 1st Jun 2020 | 6th Sep 2019 | TAS Club 1 | 2-March-0 | Male | |
| <input checked="" type="checkbox"/> | McLaughlin | Kiara | 4362 | | 10th Oct 2020 | 9th Oct 2019 | TAS Club 1 | 5-Apr-2006 | Female | |

Clicking approve all will give you a slide out menu from the right that allows you to approve all the members



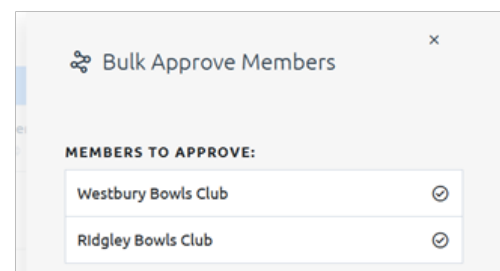
Bulk Approve Members

MEMBERS TO APPROVE:

- Westbury Bowls Club
- Ridgley Bowls Club
- Geoffrey Buchanan
- Adrian Smith
- Kiara McLaughlin

APPROVE **CLOSE**

When you click approve the names will get ticks next to them to show they have been approved.

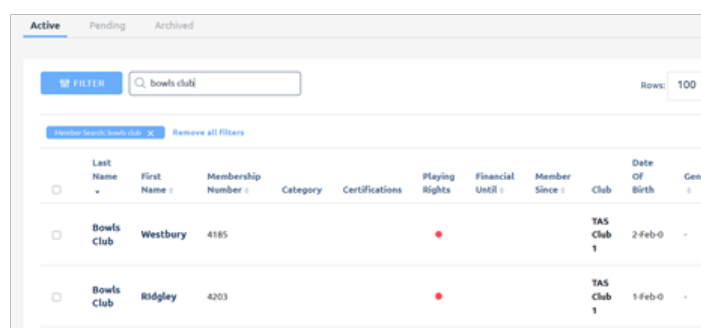


Bulk Approve Members

MEMBERS TO APPROVE:

- Westbury Bowls Club ☒
- Ridgley Bowls Club ☒

Once the names have ticks you can close the window, when the window closes the names will have been moved into the active members list.



| | Last Name | First Name | Membership Number | Category | Certifications | Playing Rights | Financial Until | Member Since | Club | Date Of Birth | Gender |
|--------------------------|------------|------------|-------------------|----------|----------------|----------------|-----------------|--------------|------------|---------------|--------|
| <input type="checkbox"/> | Bowls Club | Westbury | 4185 | | | | | | TAS Club 1 | 2-Feb-0 | - |
| <input type="checkbox"/> | Bowls Club | Ridgley | 4203 | | | | | | TAS Club 1 | 1-Feb-0 | - |

Archived Members

In the archived tab of your members list you will be able to see all members that are currently archived. As per the active and pending member lists, you will be given some of their member details without clicking into their profile. Many functions work the same as in the Active members tab.

Archive is where all deceased and previous members of the club are stored.

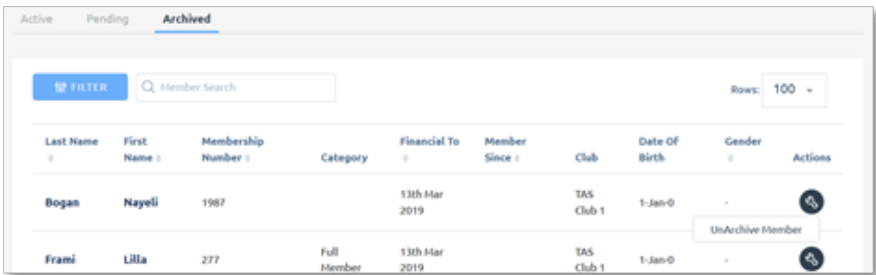
The similar functions are:

- 1. You will be able to click onto the club members’ name to retrieve additional information about this member.
- 2. You will be able to sort the list of members differently by clicking on the different column headers.
- 3. You will be able to search for a particular member by name.
- 4. You will be able to apply specific filters to only find members matching your search criteria. (This is the same as for the active and pending members)

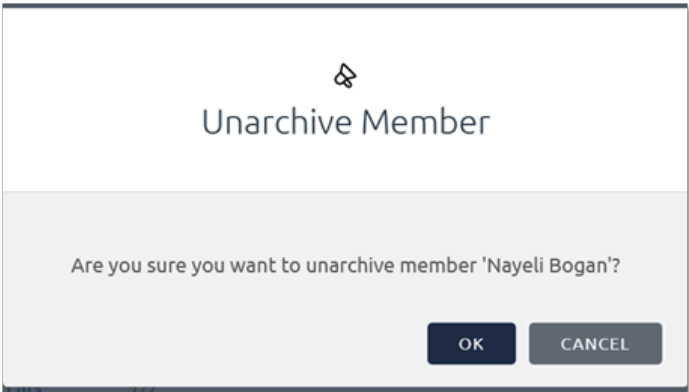
You will be able to perform additional actions for individual members. Additional actions are:

- 1. UnArchive Member- You will be able to unarchive the selected member and make them an active member of the club again.

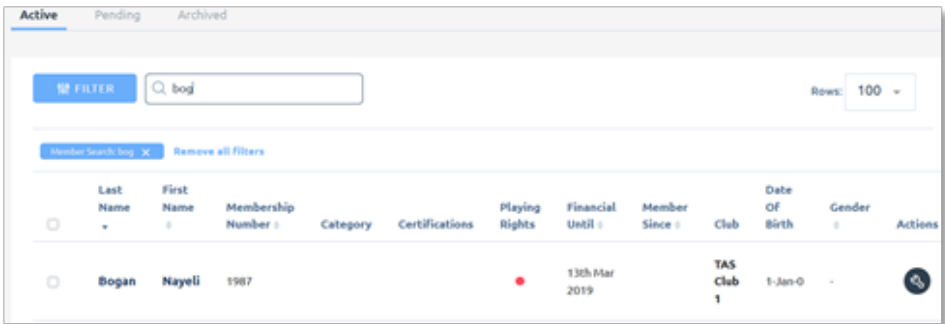
Use the actions button on the right to select the unarchive the member.



You will be prompted to ensure the action you are doing is the one you want.



Once it has been completed the member will appear in your active members list.



Member - Detailed View

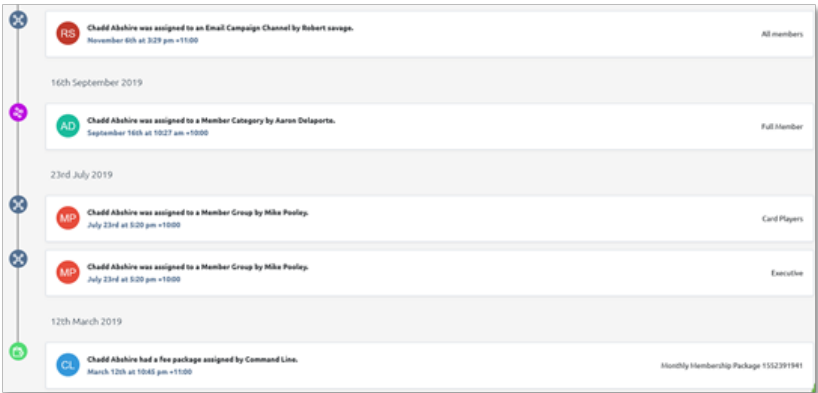
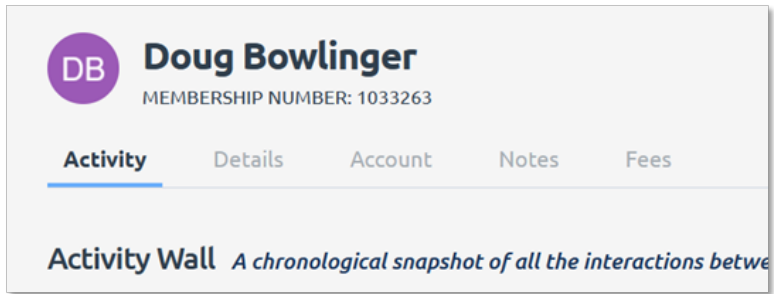
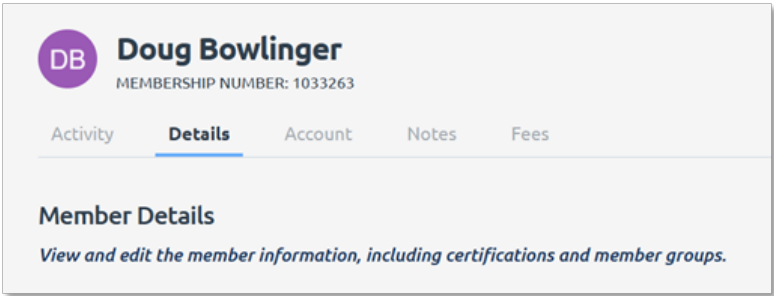
In the detailed view of a member you will be able to retrieve additional information about the member as well as being able to perform additional administrative actions.

The detailed member profile is divided into five sections (tabs)- Activity, Details, Account, Notes and Fees.

This is the same for active, pending and archived members.

Activity

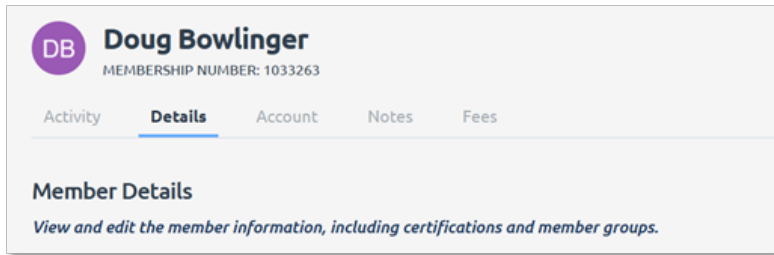
The first tab is the Activity tab where you will be able to see any activity against a members' profile.



Details

The details tab is where you will find in depth information about the member, it is also where you can edit member information.

The second tab is the Details tab where you will find most member information



This page is broken into sections for navigation purposes.

These sections are:

- Key Details
- Membership Information
- Member Groups
- Certifications
- Email Groups

We will look at each section in detail.

The screenshot shows the 'Member Details' page for Doug Bowlinger (Membership Number: 1033263). The page is divided into several sections: 'KEY DETAILS' (Membership Club, Address, Date Of Birth, Mobile Number, Contact Number, Emergency Contact, Email Address, Gender), 'MEMBERSHIP INFORMATION' (Member Since, Financial To, Membership Category, State Competitor ID, Status), 'CERTIFICATIONS' (This member currently does not have any certifications pending or verified), 'EMAIL CAMPAIGN CHANNELS' (There are no email campaign channels assigned), and 'MEMBER GROUPS' (There are no member groups assigned).

There is also an Edit Member Details on the right-hand side. Clicking this allows you to change members details.

This screenshot shows the 'Member Details' page for Doug Bowlinger. The 'EDIT MEMBER DETAILS' link is highlighted with a red circle in the bottom right corner of the page.

Editing Member Details is broken into four tabs:

- Key Details
- Personal Information
- Membership Details
- Additional Details

The screenshot shows the 'Edit Member' page for Doug Bowlinger. The page has four tabs: 'Key Details', 'Personal Information', 'Membership Details', and 'Additional Details'. The 'Key Details' tab is currently selected.

Key Details contains essential information for members.

These details are used for login details to the system and id verification and must be unique within the system.

E.g. two people cannot share and email or mobile number in this section.

This screenshot shows the 'Key Details' tab in the 'Edit Member' page for Doug Bowlinger. The form contains the following fields: 'National ID:' (1033263), 'First name: *' (Doug), 'Last name: *' (Bowler), 'E-mail address:' (dbowler@a.com), 'Mobile number:' (empty), 'Birth day: *' (3), 'Birth month: *' (June), and 'Birth year: (optional)' (1956).

Personal information tab contains additional details about members that are not used for ID purposes.

These fields do not need to be unique, and members can use the same email phone numbers here.

The first two section include:

- Email
- Phone number
- Gender
- Address

The screenshot shows the 'Personal Information' tab of a member profile form. It is divided into two sections: '1 General' and '2 Address'. The 'General' section includes fields for 'Contact e-mail address' (with the example 'dbowling@a.com'), 'Contact phone number', and a 'Gender' dropdown menu currently set to 'Male'. The 'Address' section includes three lines for 'Address line 1', 'Address line 2', and 'Address line 3', a 'Suburb' field, and three dropdown menus for 'State', 'Postcode', and 'Country' (currently set to 'Australia').

The remain sections include:

- Emergency contact details
- Email invoice options
- Deceased date (admin only)
- And Grading (NSW Only)

The screenshot shows the 'Emergency Contact' and 'Preferences' sections of the member profile form. The 'Emergency Contact' section includes fields for 'Name' and 'Contact phone number'. The 'Preferences' section includes a 'Receive invoices by:' section with radio buttons for 'Email' and 'Mail' (where 'Mail' is selected). Below this is the '5 Additional' section, which includes a 'Deceased date' field with a date picker and a 'Grading' field.

Membership Details hold information regarding membership to the club.

This includes:

- Member since date
- Financial until date
- State Competitor ID (where used)

The screenshot shows the 'Membership Details' tab of a member profile form. It includes a 'Key Details' section with the instruction 'Update the club details for the member's account.' Below this are three fields: 'Member Since' (a date picker), 'Financial Until' (a date picker), and 'State Competitor ID' (a text field).

Membership Details contains any club specific information required from members.

This section can be blank

Key Details

Personal Information

Membership Details

Additional Details

Last years schedule

Browse...

No file selected.

Insurance

Browse...

No file selected.

Can you assist coaching at the club?

No

Categories

Categories are a very important part of BowlsLink. Each category is associated with playing rights. Members who have categories that have playing rights will be able to enter competitions where playing rights are required.

Editing Categories can be done from the details page. Categories can be added using the small plus in the Membership category box

Membership Category

x

No categories have been assigned to this member

+

This will open a side bar, where you can select the appropriate category from the list.

Assign Member Category

Member Category*

playing

ASSIGN

CANCEL

Removing a category can be done by clicking the small cross next to the category on the details page.

Membership Category

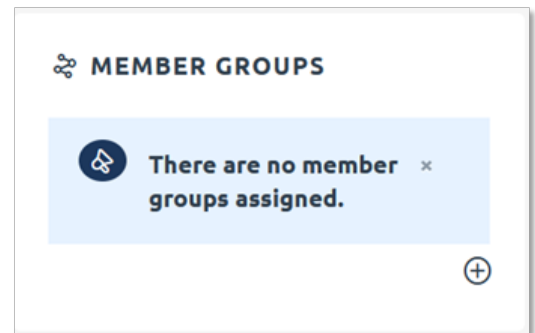
playing x

+

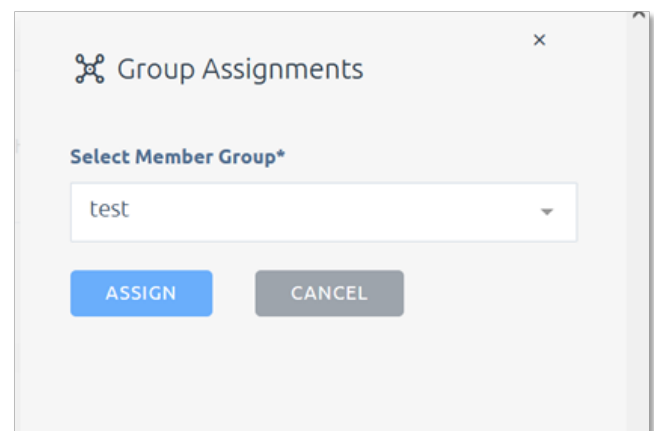
Groups

Groups are another important part of BowsLink. Groups can either be Email Campaign Channels, or not. If they are setup as an email channel then you will be able to use the Email Campaigns feature of BowsLink to email from the system to members.

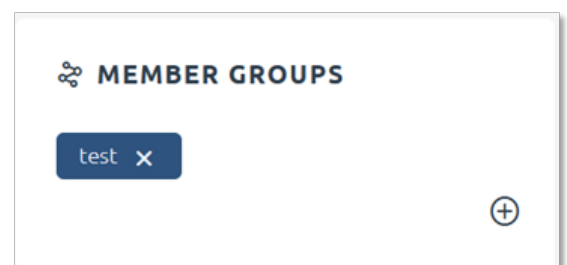
Editing Groups can be done from the details page. Groups can be added using the small plus in the Member groups box



This will open a side bar, where you can select the appropriate group from the list.



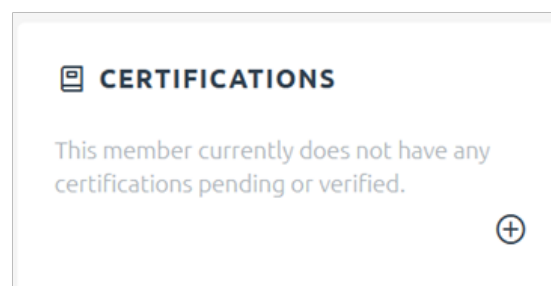
Removing a group can be done by clicking the small cross next to the group on the details page.




Certifications


Certifications are in integral part of BowlsLink as they are used to indicate everything from Responsible Service of Alcohol to International Technical Officials. Certificates can be added on the details page of a member.

Editing Certifications can be done from the details page. Certifications can be added using the small plus in the Membership certifications box



This will open a side bar, where you can select the appropriate certification from the list. The list is large, if you start typing the name the list will reduce the choices.







Add Certification

Select a certification you currently hold from the list below.


Certification*

Police Check (SA)

Date Obtained

Sat, Sep 4th 2021

Valid Until

Select Date

Supporting Documentation

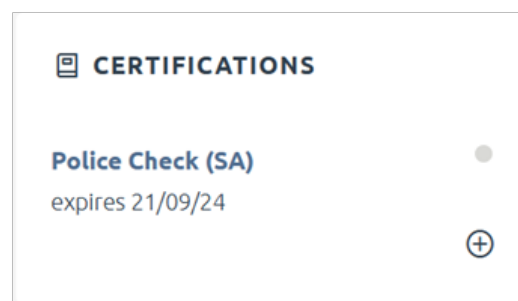
Browse...

No file selected.

CREATE

CANCEL

Members may have more than one certification. When added certification will have a grey light meaning they are pending. They will all appear as having a green light, when the certificate has been approved. Approval may need to be done by an Admin at another level.



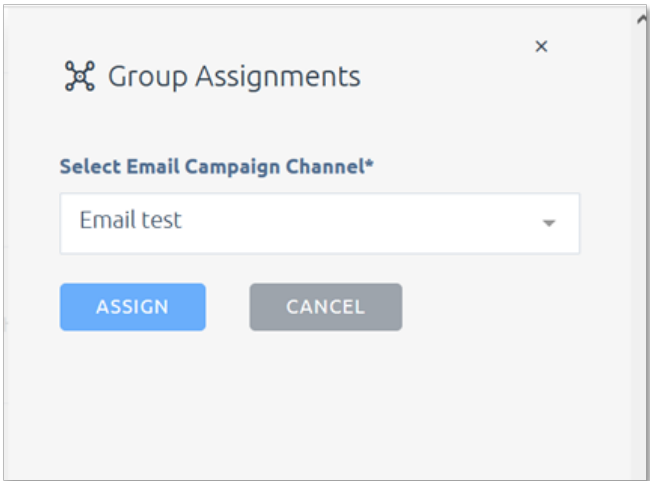
Email Campaign Channels

Email Campaigns are used similar to groups, however these channels are updated to an email campaign manager every day, so by adding or removing people to these channels enable members to receive important emails from administrators. Members can remove themselves or add themselves at any point to email channels.

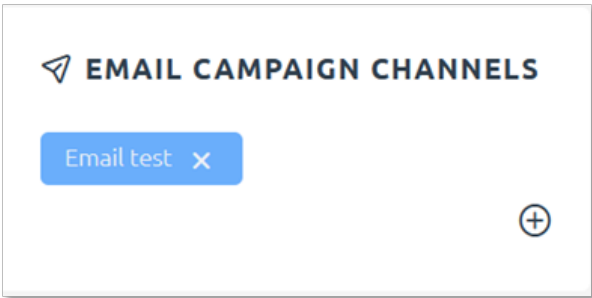
To add members to an email channel you can use the plus sign in the bottom right of the email campaign channel box.



This will open a side bar, where you can select the appropriate campaign channel from the list. The list is large, if you start typing the name the list will reduce the choices.



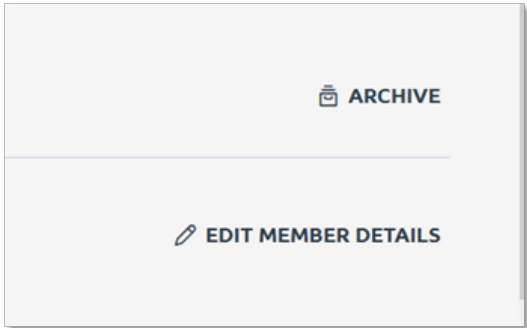
Members may belong to more than one Email Campaign channel. Members will be able to remove themselves from these channels. To remove members from particular channels you can click the cross next to the channel name.



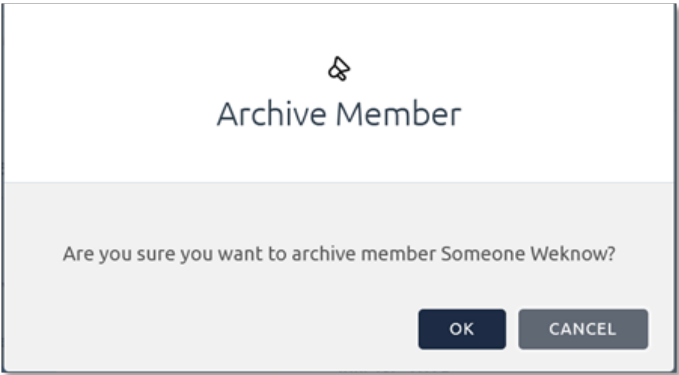
Archive

The archive function can be used when members leave the club. Putting members in Archive will remove them from and email campaigns and member groups. They will also be removed from the active listing and put under the archive listing.

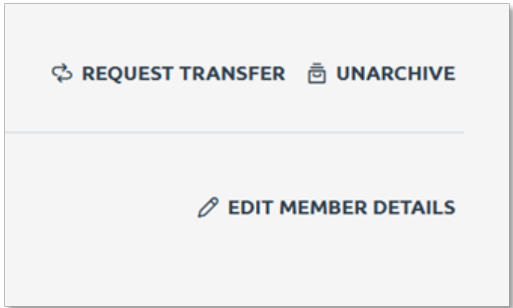
To archive a member, use the archive function located about the edit member details function.



You will be presented a confirmation box to ensure you want to archive the member



Once the member is archived they will only appear in the archive list.
Members can be unarchived in a similar way from the archive list using the unarchive function.
When players are unarchived they will return to the active list with no groups or categories.

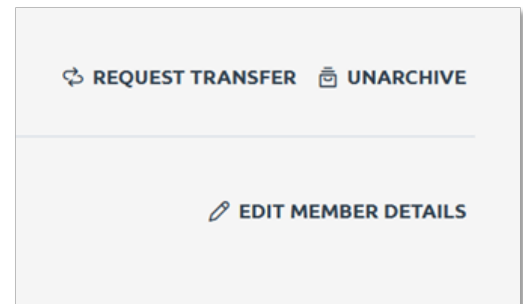


Request Transfer

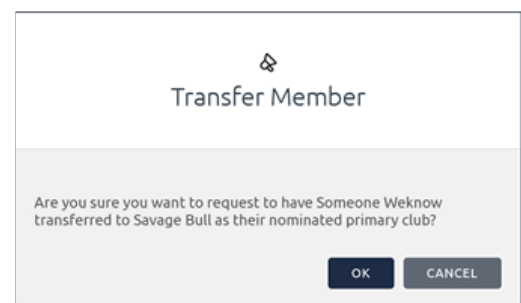
The request transfer option will appear when a member is archived at your club, or when they are a duel member, and your club is not the primary or declared club.

Using this function will start a transfer process which will initiate a switch of primary club from one to the other. This may require approval at STA level.

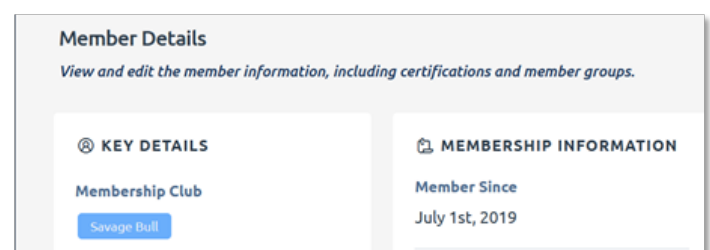
When the member is archived if they are returning to the club you can select the Request transfer function.



This will open a dialogue box asking to confirm the transfer and make your club the primary club.



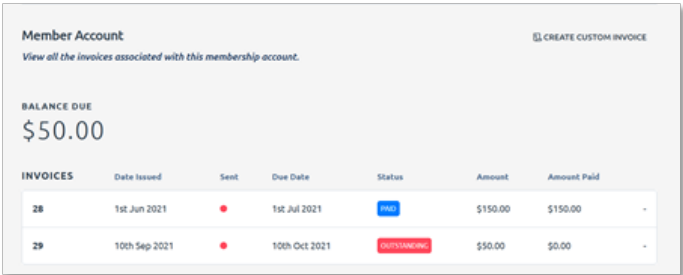
When the member is unarchived, your club will become the primary club for the member.



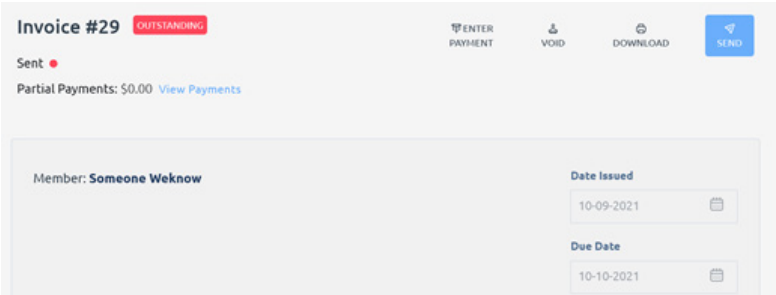
Account

The third tab is the Account tab where you will be able to view all the invoices associated to this particular member. You will be able to find invoice information and perform the following actions:

The account tab will show you a history of invoices issued through the system. It will also show any outstanding balances.



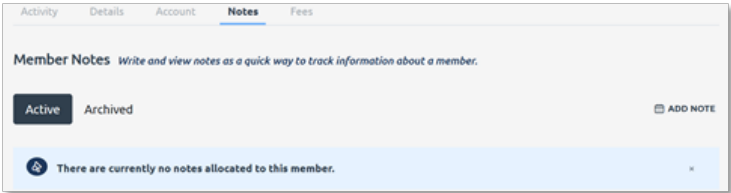
Clicking the invoice will give you more options. Including entering payments, voiding the invoice, downloading to print or sending via email.



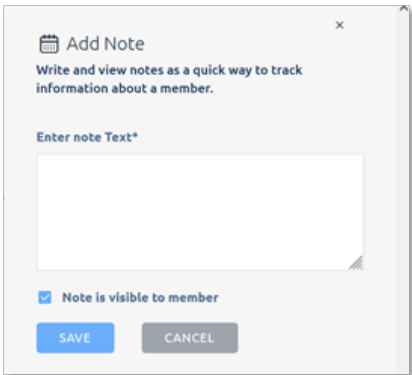
Notes

The fourth tab is the Notes tab where you will be able to write and view notes as a quick way to track information about a member. You will be able to perform the following actions:

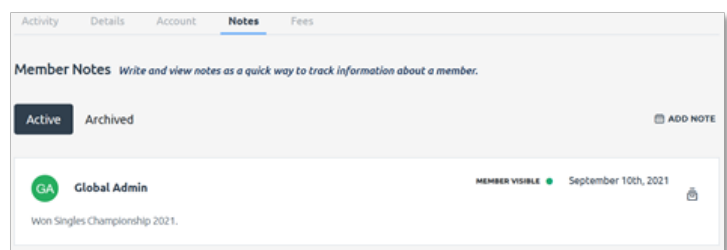
Notes can be added using the add note function in the top right



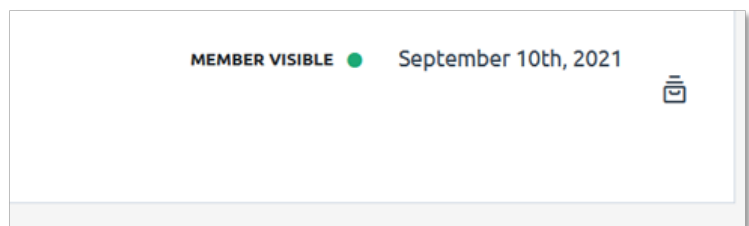
This will open a dialogue box, where you can put the note. You can also select if the note is visible to the member or not.



Once the note has been added it will appear in the list.



Notes can be archived but not deleted. To archive use the archive function on the right of the note.



Archived notes can still be viewed by changing the notes view from active to archived.

