

# console.sportstg.com Notes BDFPA

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[Last edited 17/05/2020, 14:45]

## Weekly processing, Friday 12.00 noonish

- Members > Members listing
- Click on Member Status 'Online' and Financial Status 'Financial' to see joining/renewing lifting members; and on 'Online' and 'Unfinancial' to see joining/renewing Official (Non-lifting) members.
- Refer to your Word list from the previous week and make those members active by clicking on the green circle under 'Status' by each name. They will disappear from the Online list because they are now Active.
- Select the resulting list and copy-paste it into a Word document; then use the Table command in Word to delete all the columns except the last name and first name.
- Check whether each person already has a data entry in the system. You do this by clicking on 'Members listing' > Member Status 'All', choosing the relevant letter of the alphabet (otherwise searching takes too long) and find each member with the 'Basic Search' function.
- When a person has one or more expired membership records, you'll need to merge the current record with those. (In the case of a previously banned member, consult the President and delay merging records.) In the current record in the list, click on the 'View' (eye) logo and then choose the 'Merge' command. Search for the name. The result may take a while to appear; when it does, click on the first little person logo . 'Do you wish to confirm your request to merge this record?' > Merge Record > Which member number do you wish to keep > choose TBA (or, if both are numbers, the highest number). This is important – the member number you choose determines which details remain on the record, so if you choose an old number and address or email has changed, you will lose that information forever. Wait till 'No members match search criteria selected' appears, and then click on 'Previous' to go back to the member's details page.
- Check that there is a date of birth. If not, write to the member (there is an email template for this: see 'Templates' in this document for how to use them).
- If a Teen/Student membership has been chosen, check the date of birth, and if the person over 25 and has not sent proof of student status, write to the member to ask for one (there is an email template for this).
- Check that the 'Division or Club' matches the 'Member Type' – if only a Division name is shown, then Member Type should be Individual. If there is a only a Division name and Member Type is Club, the person has either omitted to choose their club, or has paid a Club rate when they are not a Club member, and you will need to write to them (there is an email template for this). If a club name is shown and Member Type is individual, they may have chosen a club in error or paid too much, and you will need to write to them (email template); and if they reply giving bank details, to ask the Treasurer to reimburse them.
- Add columns for 'Division or Club' and 'Member Status' to your Word document table, and complete these columns. In the case of people who are

not new members, you can find out when they were last members from their record by clicking on History > Subscriptions.

- Send the list to the National Council. I also usually tell them how many members we have. You can tell this from Members > Members Listing > Active. When you choose either Financial or Unfinancial, at the top of the list it will tell you how many records there are in that category. And then I go to the previous year's vetting email from about the same date and tell them those figures.
- Go back to your Word list from the previous week. On the console, find the people on the list in Members Listing > Active and Financial / Unfinancial, and send each one an appropriate email (Confirm payment, or Confirmation of official (non lifting) membership). (You can also find them by clicking on their name in your Word list, as long as the console is already open.)

## Templates for emails

### To use a template

When you are viewing a member's record, click on the Email button and you get a choice of templates. Choose the appropriate template, click Next. You can look at the text of the template in the HTML tab, and change it where appropriate. You'll need to copy the html version and paste it into the text version if you have changed anything. On the General tab, you can change the sender email from the Membership email (default) to another email – the President's, for example, or another officer if that is the person you want shown as the sender. A last check at the top of the page that it's going to the right person, then click 'Send email'.

### To edit a template

Go to Tools, Email templates, HTML.

Edit, and then copy and paste the text to the plain text version

> Save

### To create a new template

Tools > email templates > +Add (Note that if you want to include a BDFPA 'card' to a template, you can copy it from an existing template)

### You can archive a template

Click on 'Archive' to remove a template from the current list, for example if you think you may need it the next year (or if you're just not sure whether you want to get rid of it completely), and then you can unarchive it. (Click on 'Archive' at the top to see archived templates.)

## Sending an email to everyone / a division / etc.

Members > Send Email > All Members [Leave 'Selection' as 'Blank Template'] > Division / Club [Choose, for example, 'BDFPA West Midlands Division', or leave blank for all active members] > Next > General Tab [type in Campaign Title (not seen by members) and type in Subject; if required, change sender email from the default (Membership) one; and you can also change the Sender Name to your own] > HTML

tab [Paste your text] > Plain text [Paste your text again] > Generate campaign > Manage Campaign > Send > Send

## Adding a member manually

Members > Members listing > Add

(For some reason, you can't input all the information. For example, I put the emergency contact details in the Notes section.)

## Making someone financial

(You will need to do this when someone has entered offline, and you have enrolled them manually.)

1. Under Administration, Login to the Division/Club the Member is at (Division OR Division or Club > Listing > click on appropriate Login)
2. Go to Subscriptions tab
3. Click Generate Subscriptions
4. Click Single Member
5. Select Member you want to update from drop down menu and click Next
6. Under Subscription Type select Blank Subscription and click Next
7. Type in a Title – I use Financial Status Correction
8. Leave amounts as they are at 0
9. Under Financial Status select Yes – Financial End Date then choose your Financial End Date
10. Click Generate
11. Click Post
12. In the Left Hand Menu Click Transactions and choose Unpaid
13. Find the Member in this list and press the Dollar Sign in the Pay column
14. Keep pay method as cash because it is \$0. Click Process Payment.
15. 'Return' in top right corner to come out of Division/Club logon

## Refunding a duplicate payment from the console

1. Log in with the username 'MemberSupport' (or your username)
2. Click on 'Administration' in the top menu
3. Go to 'Division' or 'Division and Club' and then 'Listing' on the left hand side menu
4. Where it shows the Division or Club, click on the 'Login' icon in the last column
5. Click on 'Members' in the top menu and then 'Members Listing' on the left hand side menu
6. In the Basic Search area, type in the member's family name and click Search
7. Click on the 'History' icon for the member's profile
8. Click on the 'Subscriptions' tab

9. From here you should now see the 'Cancel' icons for each payment.  
Cancel the payment you wish to refund.
10. You will be given the choice to proceed with the refund and make the member unfinancial. Proceed. (The other payment will keep the member financial.)
11. In the left-hand menu, choose Transactions > Cancelled. A \$ sign will then appear next to the member's cancelled subscription. From here you can click on the \$ sign.
12. On the 'Issue Refund' page, add comments if you wish (for example, 'Duplicate payment') and click 'Next'
13. On the next page, click 'Process refund'
14. Click on 'Return' in the top right hand corner to log out of the Division / Club and back in to your own log in

## End-of-year timetable

- 15<sup>th</sup> November: deadline for clubs to renew/affiliate in order to be on drop-down menu for 1<sup>st</sup> December
- 1<sup>st</sup> December:
  - Turn membership options on and off
  - Make sure 'paper' application form on the web is up to date
  - Turn off unaffiliated clubs
  - Renewal email to members
- 1<sup>st</sup> January: Expiry email to non-renewed members

## Turning membership options on and off

1st December:

- Subscriptions > Subscriptions - Types
- Select type of membership - Select Edit
- At the bottom of the "general" tab you can see:
- Show on display - yes enabled / yes - disabled / no
- Select either yes or no.

AND go to Subscription types > [the type] > Member > **Include Subscription In Member's Section / Member's Portal: Yes**

**AND** in the financial tab, change Financial Status and Financial End Date

**AND** if necessary, go to 'Members > Member Type', choose the type and change the text, e.g. change the year.

\*\*\*Most of this is done at the beginning of December, but remember to change the End-of-Year Membership details on 31 December.\*\*\*

## Year (and fees) on form and receipt (including President's letter)

1<sup>st</sup> December: Go to subscriptions / Subscription types / select the appropriate type and click on edit. For the End of Year receipt: go to Receipt and scroll down to the actual "membership card" and change e.g. 2018 to 2019.

NOTE that you can also, for example, edit the cost of the Teen membership.

## Turning off clubs that have not re-affiliated

1st December: turn off unaffiliated clubs. Administration > Division or Club > listing. Choose the club and change name to 'X – Unaffiliated – name of club'. DON'T delete the club, because that will delete things in member histories. But when you've saved it, go to 'Status' and turn it off (✓ to X)

## End of year emails to members

### 1st December: Send renewal email to all Active members.

- Members > Members Listing > All Division > All Division or Club > Active > All.
  - Send Email [left-hand menu] > All members > Next
- Campaign Title – e.g. '2021 Renewal'. Only you will see this.
- Subject: This is what the member will see, e.g., 'Time to renew your BDFPA membership!'
- HTML [tab at top]: put your text for the members here. Then select it, copy it, and > Plain Text, paste the text into the Plain Text box
  - Generate Campaign > Manage Campaign > Send > Send

### 1<sup>st</sup> January: Send expiry email to all Active members who have not renewed.

- Members > Members Listing > All Division > All Division or Club > Active > Unfinancial. (This will ensure you send to members who are still active but have not paid a fee for the current year.)
  - Send Email [left-hand menu] > Member type > [choose each member type in turn to send emails to, but do NOT send to 'Official (Non-lifting)'] – this has to be handled separately. > Next
- Campaign Title – e.g. 'Expiry Standard Club Members [year]'
- Subject: This is what the member will see, e.g. 'Your BDFPA membership has expired, but you can re-join!'
- HTML [tab at top]: put your text here. Select it, copy it, and > Plain Text, paste the text
  - Generate Campaign > Manage Campaign > Send > Send

### As members renew: send confirmation emails

One way of doing this is to go to Subscriptions > Transactions > Division/Division or Club Payments Received and go to the last page by clicking on the word 'Date' at the top of that column to reverse the order of the dates. This shows you who has paid and you can send out their emails with their cards. I keep a separate console page open for this, so just go back and forth between the pages to check. Also means you can check that club members are really club members and that people are paying the right fee.

## Editing material from application form and receipt

This is scattered round 'Members', 'Options', and perhaps other places

- Text of pledges are under Members > Registration Declarations
- Some application form questions are under Members > Options
- Some application form questions are under Members > MemberDesq
- Member types are under Subscriptions > Types
- List of Divisions and Clubs for the drop-down menu are under Administration > Division or Club
- **Welcome message** from the President is under 'receipt'.

**All member payments are under Subscriptions > Transactions > Division / Division or Club Payments Received** (some of the other intuitively correct options are incomplete)

## Figuring out how many members we have

- Members > Members Listing. Use the buttons by 'Member Status' and 'Financial Status' to find the categories you want. 'Active' includes all confirmed members, both lifting and Official (Non-Lifting). 'Online' includes all those who have applied online but not yet been confirmed by the NC. 'Financial' includes all those who have paid for a membership in the current financial year, so it does not include Official members.
- Use 'Division' and/or 'Division or Club' to see only those members.
- If you want, for example, to find the Official Members, in the Search box, go to Advanced Search > Member Type.

## Corresponding with STG

BDFPA

Organisation ID 10054

## Adding new admins to the system

**To add a new admin ('User') to the system – Admin > Users**

## Member username and password (from STG, July 2018)

If a member is unsure of their user name or password, they can:

- Click the 'User Name & Password' option to retrieve their user name, or their password (to ensure this is turned on for the membership portal please go to: Members > MemberDesq > User Name & Password = Yes)
- Alternatively, click on the 'Forgot Password' link in the log in area.
  - Here the member will be greeted with two sections:
    - User Name Retrieval: by adding in their email address, this will send an email with their user name
    - Password Retrieval: by adding in their email address and user name, this will send an email with a link to update their password

- If an administrator has forgotten their password, on the console log in screen (console.sportstg.com) there will be a 'Forgot Password' link that will email the password reset link to the email address against that User.
- For Events: Team Managers and PIN managers will need to use the Forgot Password feature to re-set their password as it will no longer be emailed automatically
- Please note that the password reset link is only valid for 30 minutes after it has been generated, so please be sure to change your password within that time frame. If are unable to, please attempt to reset your password again.

## Banned and suspended members

- add 'BANNED' or 'SUSPENDED UNTIL dd/mm/yy' after the family name in the database, so that if anyone searches for e.g. 'Mouse', the name will appear as 'Mickey Mouse BANNED'
- add a brief explanation in the notes section of their account as to how it was decided, e.g. by the President BDFPA
- In the Member Listing view, change their status to inactive by clicking on the green tick to change it to a red X
- In the same view, click on 'Groups' and add them to the 'Banned/Suspended Members' group

## BDFPA Clubs

**The club functions on the console are distributed in 'Administration' and 'Events'; and you may also want to set up email templates in 'Tools'.**

### End-of-year timetable

- 1<sup>st</sup> October: Clubs can renew
- 15<sup>th</sup> November: deadline for clubs to renew/affiliate in order to be on drop-down menu for 1<sup>st</sup> December
- 30<sup>th</sup> November: deadline for clubs to renew/affiliate in order to be on drop-down menu for 31<sup>st</sup> December
- 1<sup>st</sup> December: members will be able to purchase next year memberships; if their club has not renewed in time, they will not be able to get club rates
- 31<sup>st</sup> December: deadline for clubs to renew/affiliate in order to be on drop-down menu 15<sup>th</sup> January
- 1<sup>st</sup> January: from this date onwards, processing will normally take two weeks for new or renewing club affiliations

We write to clubs to remind them to renew. (NB We do not write to the Police or Combined Services clubs – these are handled centrally.) On the console: Administration > Division or Club > Listing > for each of the clubs that aren't Police or Combined Services, click the Email icon > Template '006 Clubs – renewal 2018 and timetable' > Next > Send email. You will probably want to nudge clubs that do not renew.



## New clubs

### To add a new club to the system

We can't do this on our own. When we get an email from the system saying that a new club has signed up, we need to go to console.sportstg.com and send a Help request. For this you need to use our organization name: BDFPA and ID: 10054. You will need to tell them the following, most of which will be accessible on the console at Events > click on British Drug Free Power Lifting Association Club affiliation 2019 > Entrants > on the row of the new club, click on the eye logo ('View').

- which Division the club is in (you may have to look this up from the address)
- the name of the club
- the club contact person
- address and email
- telephone number

(You may have to email the person who has made the payment and application to check the address of the club and the preferred telephone number.)

(Note: to see which clubs have renewed so far, go to Events > click on the 'Title' [British Drug Free Power Lifting Association Club Affiliation 2019](#) . This will open another page. Down the side of the page, in white print on a grey background, you will have a list > click on Entrants, and you will get a list of everyone who has ever paid. If you click the word 'Entry' at the top of the column, it will sort in reverse order of payment.)

### When a new club is added, you ALSO need to activate their Credit Card Gateway:

Administration > Division or Club > Listing

To login to any of these club's consoles you need to select the club's **Login** button on the very right hand side (a very badly drawn yellow key with a green arrow)

1. Go to Administration
2. Select Credit Card Gateway from the left-hand side
3. Press the Activate Credit Card Gateway button
4. On the top right of the page, click on 'Return' to go back to your own login.

### When a new club is added, you ALSO need to check their listing as it will appear on the drop-down menu:

Administration > Division or Club > Listing > [Choose the club] > Edit

(As I am distrustful, I then begin the process of signing up as if I were a new member, to see if the new club's name appears in the drop-down menu; I abort after that stage of the process.)

**Lastly, you need to email Webmaster Pete Gaskin** and ask him to put the new club on the Affiliated Clubs webpage.

## Other club functions

### Changing text on club affiliation page

Events > British Drug Free Power Lifting Association Club Affiliation [year]

Select Basic Information from the left-hand menu

Select Edit

- On General tab, you can change the title (e.g. change the year) and the start and finish dates
- On the Summary tab, you can change the text on the club affiliation page.
- On the Waiver tab, you can change the text in the pledges that club managers sign when they affiliate

### Keeping the club affiliation online

Events > British Drug Free Power Lifting Association Club Affiliation [year] > Click 'Offline' in the Status column to switch it to 'Online'

### If a club does not re-affiliate for a new year

Administration > Division or Club > listing. Choose the club and change name to 'X – Unaffiliated – name of club'. Don't delete the club, because that will delete things in member histories. But when you've saved it, go to 'Status' and turn it off (✓ to X)

### Corresponding with clubs

Administration > Division or club > Listing > Email icon

### If a club does not know what their username and password is

They will need to contact you to get these details. The details for each club can be found under Administration > Division or Club > Listing > View the club > Access tab

## Reminder: corresponding with STG via the help function

Name: BDFPA

Organisation ID: 10054