ClubSpark

User Guide for tennis clubs

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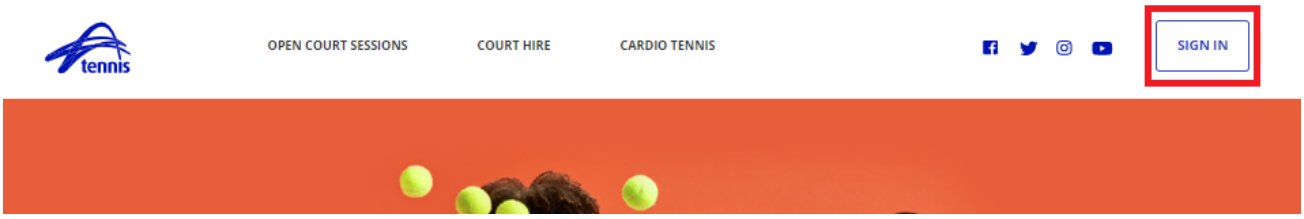
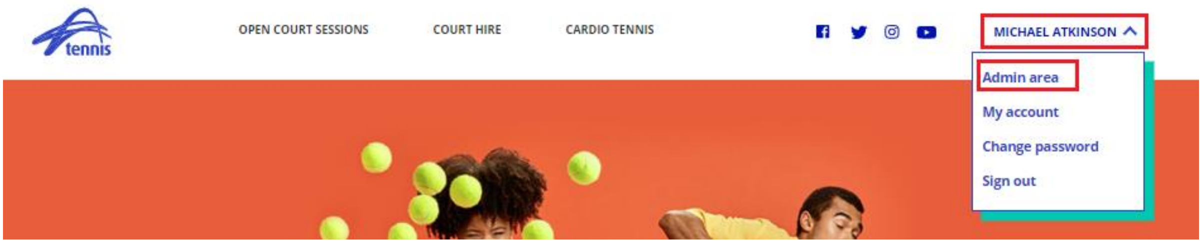
Getting Started – Navigating the Admin area

Head to play.tennis.com.au and in the top right corner of the page, click **SIGN IN**.

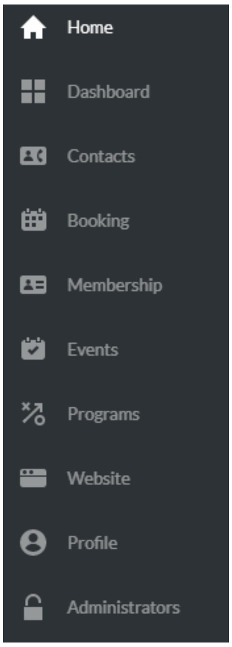


Once signed in, your name will appear in the top right of the screen. Click on your name then click **Admin area**.

Note: if you've recently been granted admin access, you may need to refresh the page or log in/out for the change to take effect. Otherwise, please get in touch with the Customer Support Team to provide administrator access.



When in the Admin area there are a number of modules that can be accessed from the main menu on the left-hand side of the screen. See below for further information about each module available in this user guide.

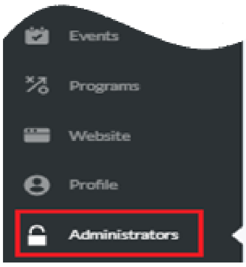


Menu option name – brief description
Home – shortcuts, Customer Number, and Support information
Dashboard – summary totals: bookings, revenue
Contacts module – accessing individual contact records
Booking module – Book a Court - court hire setup
Membership module – membership packages / emailing all members
Events – bookable event setup
Programs module – setup for short & recurring bookable courses
Website – setup for Club's own website
Profile – Club location and key contact information
Administrators – managing / adding administrators for each Club

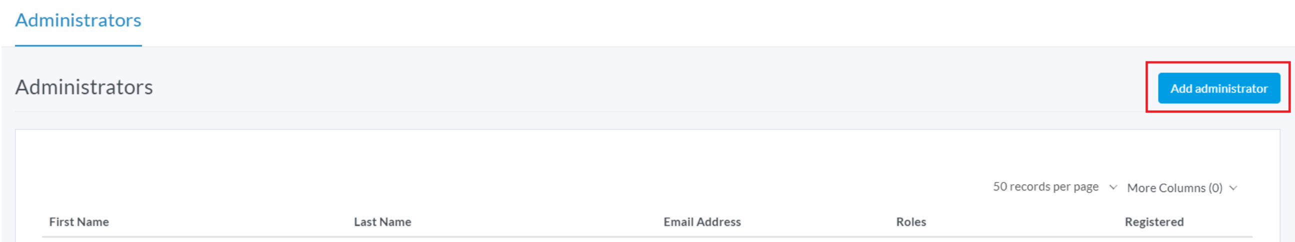
Note: clicking the 'menu' icon next to the Club name (top left of the screen) will collapse or expand the main menu to display only menu icons, or click again to see the menu option name.

Adding Administrators

To edit and/or add administrators at your venue, click **Administrators** from the left-hand main menu, while logged in under the Admin area.

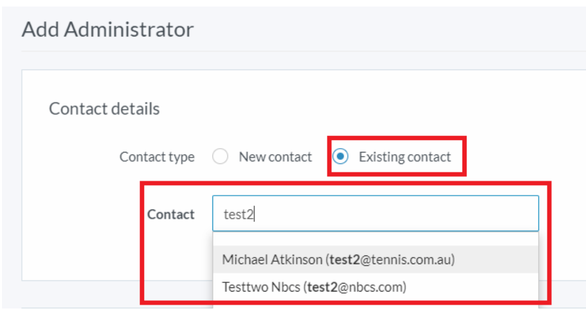


To add a new administrator, click **Add administrator** from the Administrators section.

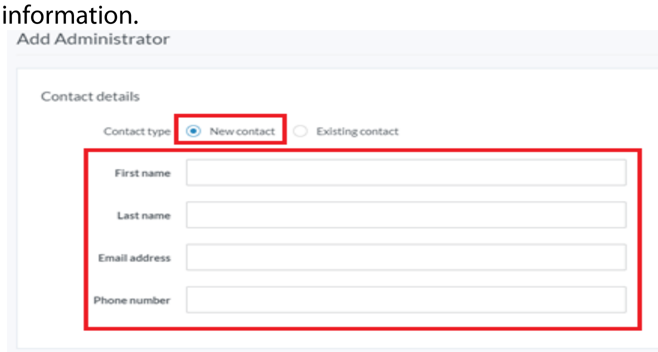


First, check if they have an existing contact record to avoid creating a duplicate.

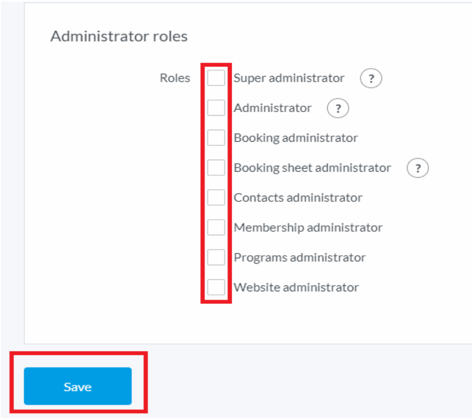
Click the radio button next to Existing contact, type their name into the Contact box, and the system will begin a search to match the text entered. If the correct name appears then select the relevant contact record.



If the name does not appear as an existing contract, click the New contact radio button and complete the requested information.



Once the correct contact has been selected (or added), tick the appropriate administrator role box and click **Save**

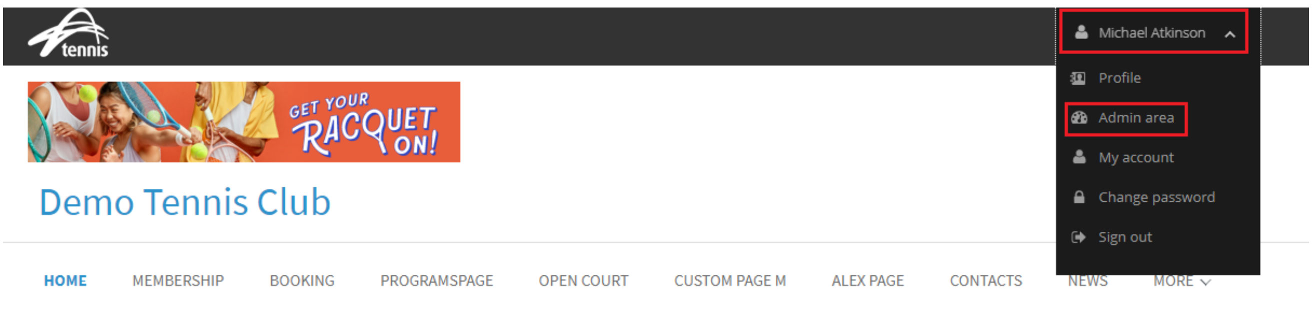


Note: click this icon if it appears on any screen for help and information about the option

Administrator Role	**Description**
Super Administrator	Full admin rights, can also revoke administrator roles
Administrator	Full admin rights, although cannot revoke administrator roles. Users with this role will automatically inherit all of the administrator roles below
Booking Administrator	Access to the Contacts & Booking modules (including configuration settings)
Booking Sheet Administrator	Can manage the booking sheet as an admin (i.e. access to advanced booking options to make recurring/multi-court bookings), but cannot access the admin area
Contacts Administrator	Access to the Contacts module only
Membership Administrator	Access to the Contacts & Membership module
Programs Administrator	Access to the Programs module only
Website Administrator	Access to the Website module only

When a <u>new</u> contact has been granted an administrator role, they will receive an invitation to register – remind the staff member to look out for the email.

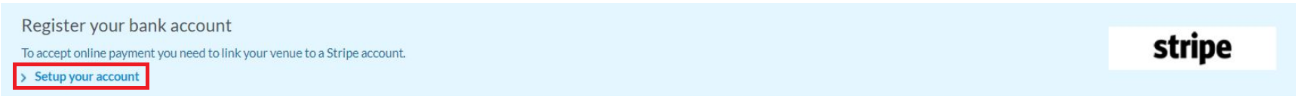
<u>Existing</u> contacts will be able to access the Admin area the next time they log in (or by clicking Refresh after changes have been made).



Setting up and connecting a Stripe account in ClubSpark for the first time

In order to start taking online payments, clubs must connect a Stripe account to ClubSpark, either by setting up a new account or associating an existing account in the Stripe registration area. **NOTE**: this screen does not appear again once an account has been connected or set up.

To access the Stripe setup screen, log in and go to the **Admin area**. Select the **Booking** or **Programs** module from the left-hand main menu. Click **Setup your account**, and on the next page click **Register with Stripe.**



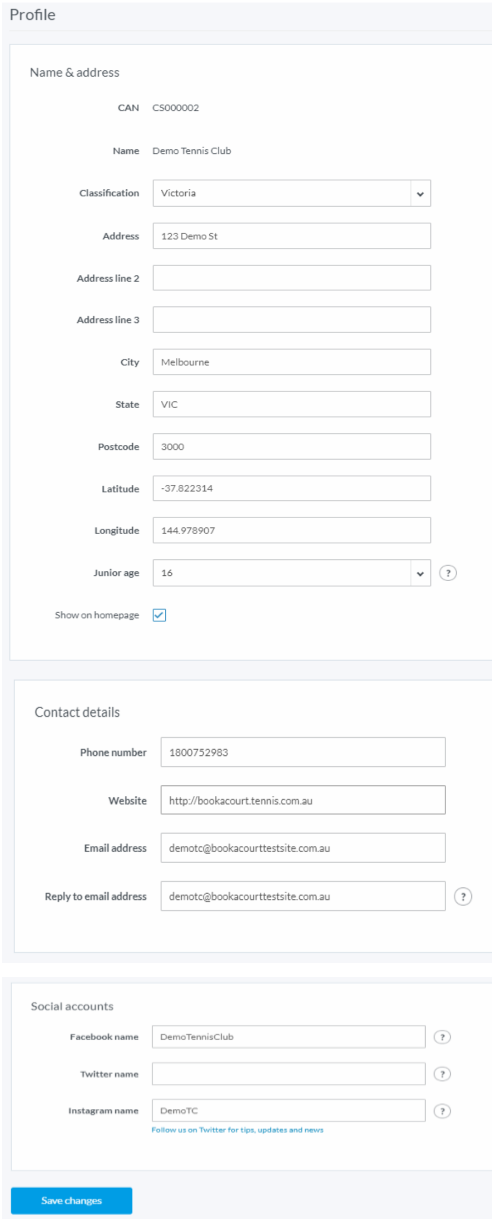
Clubs who want to use an existing Stripe account:
If clubs already have an existing Stripe account, this can also be used for ClubSpark.
Click on the button in the top right to **sign in** and connect their existing Stripe account to ClubSpark.

Setting up a new stripe account: If clubs do not have a Stripe account, they are required to fill out the Stripe application form and click **Authorize access to this account**. The club will be able to take online payments through ClubSpark as soon as this creation process has been completed.

Profile Module

The Profile module displays venue information including address, latitude & longitude of their map location, contact details and social media information.

NOTE: It is important that this information is up to date and accurate, as these details will be displayed on the National website at play.tennis.com.au.



These fields have been pre-populated at the time of software configuration for each venue.

Clubs can set the Junior age up to which the system will consider contacts as juniors. Use the drop down menu to select the age.

Junior contacts cannot be emailed directly – the email address for their parent/guardian contact will be used when a junior contact is emailed.

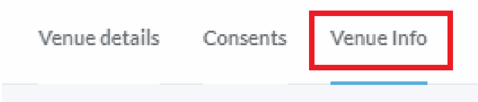
If the **Show on homepage** box is ticked, then this venue will also be displayed on the National website play.tennis.com.au.

When a **Reply to email address** is set, any replies to emails sent to the contacts from ClubSpark will be delivered to this email address.

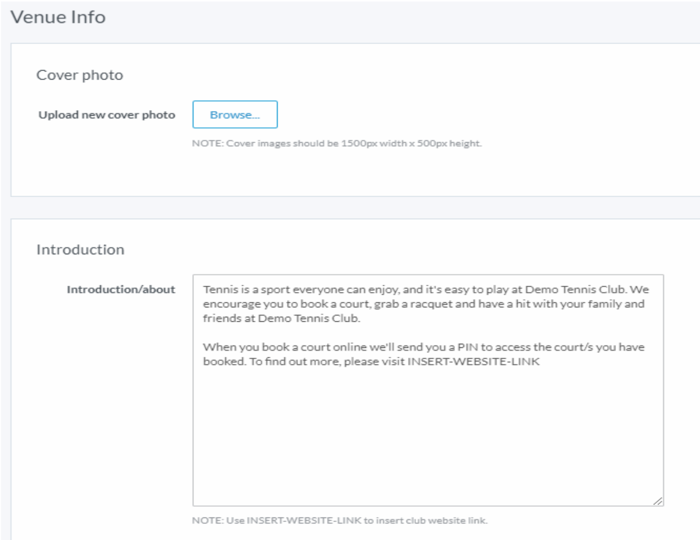
Enter the venue's Facebook, Twitter & Instagram page names. You can get this from the end of the web address, e.g. https://www.facebook.com/**DemoTennisClub**

Confirm details are correct and apply any changes by clicking **Save changes** at the bottom of the page.

In addition to the above, clubs can include further details to their venue profile such as access info & available facilities. In the top right corner, click **Venue info** as shown below.



Clubs who have not activated the **Website** module of ClubSpark, will be able to use this page to personalise the club's "venue landing page".

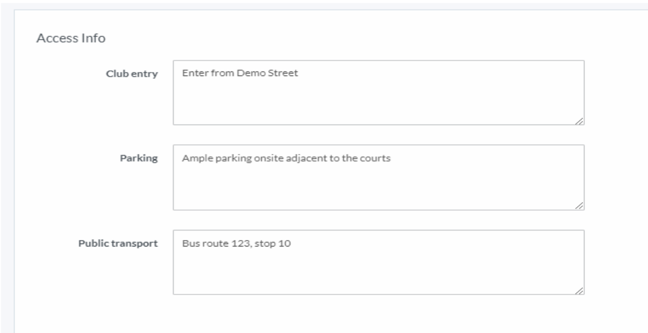


A cover photo can be added to the venue landing page by clicking **Browse** then selecting an image from your computer and then clicking **Open**.

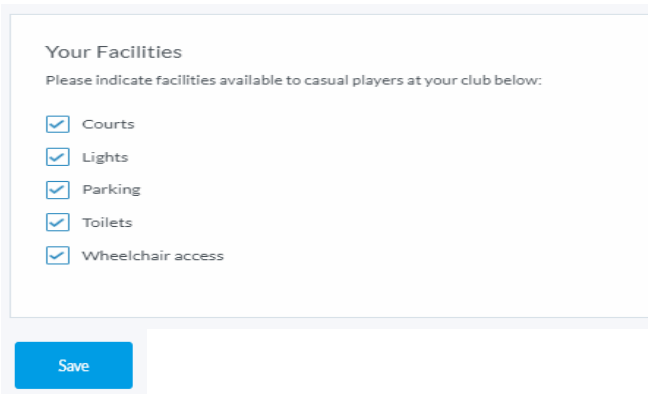
NOTE: Ensure the image uploaded is 1500px (w) x 500px (h) to avoid stretching or disorientating the photo.

Enter introductory texts about the club.

NOTE: Use 'INSERT-WEBSITE-LINK' to insert the club website link.
The website address entered in the **Contact details** of the previous page will be used.



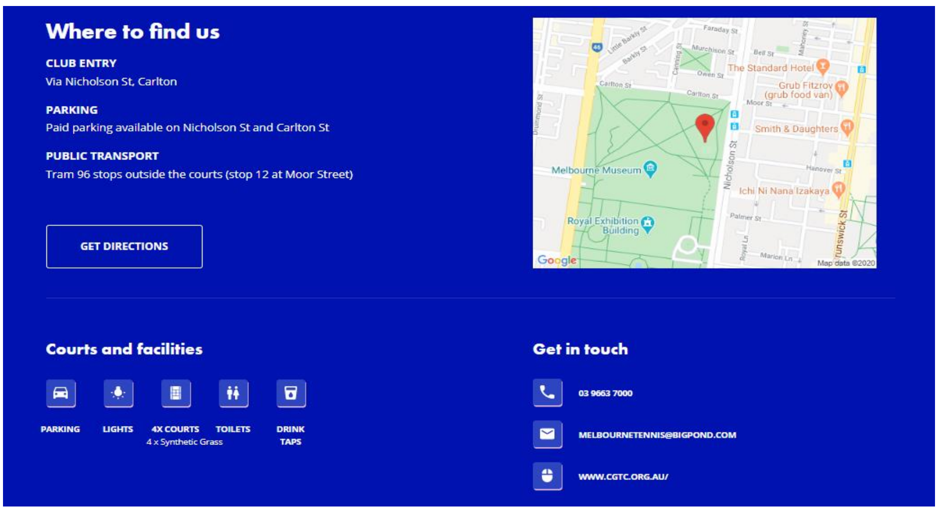
Enter club entry, parking and public transport details



Indicate the facilities available to casual players at the club by ticking the boxes next each item.

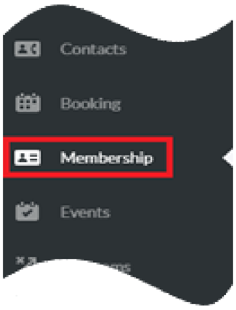
Ensure to click **Save** at the bottom of the page when all information has been added.

See image below of how this Profile information will appear on the venue's page of the National website.



Membership Module

To access the membership module, click **Membership** from the left-hand main menu.

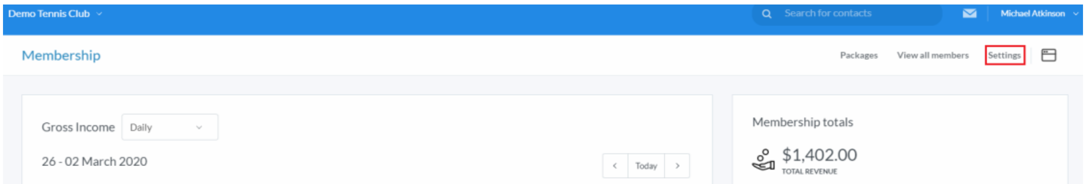


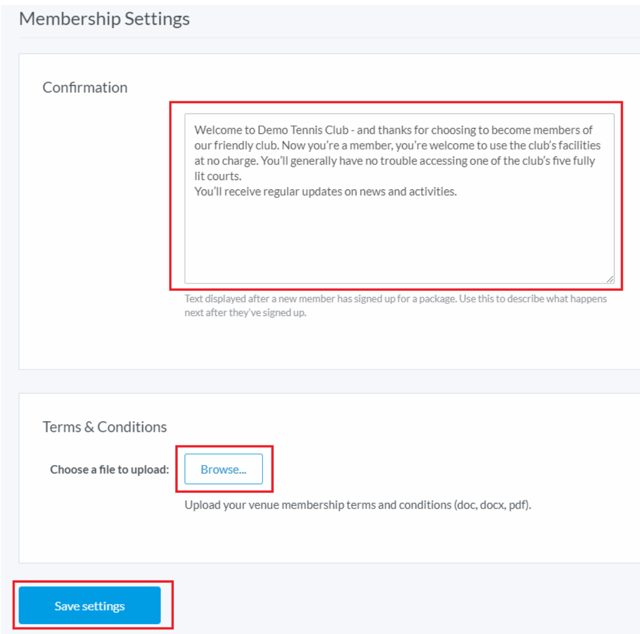
This module gives access to:

- Create, amend and view membership packages
- View membership totals (i.e. income and revenue)
- Access, export and email all members (e.g. to send an invitation to register)

Membership Settings

To access membership settings, from within the Membership module click on **Settings** in the top right of the screen.





Within this screen clubs customise the confirmation email that is sent when a member has signed up for a membership package online.

They can also upload a file containing the membership terms and conditions that will be attached to the email.

Once complete, click **Save settings**.

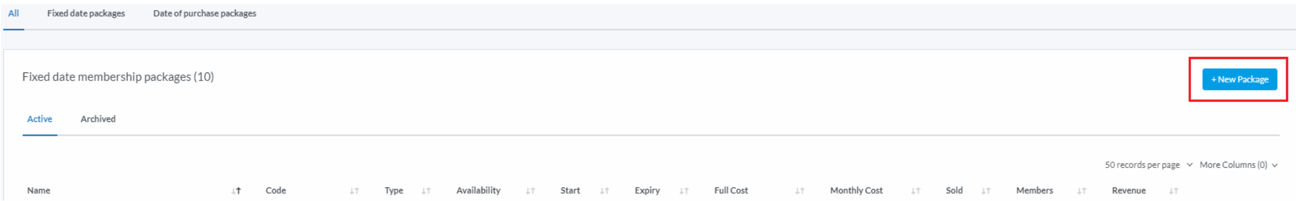
Creating new membership packages

Clubs have the ability to create two types of membership package – Fixed date or Date of purchase:

Fixed date membership package: Members will be “active” for a specified period only. All members will have the same membership period.

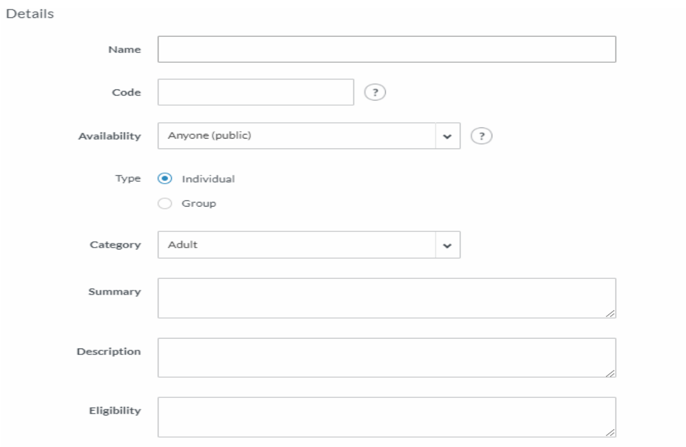
Date of purchase membership package: Members will be active for a specified period (e.g. 12 months) starting from the date the membership was purchased by that member.

To add a new membership package, scroll down the screen in the Membership module and click **+New Package:**



Section 1: Details:

Complete the first section with core membership package details:



Notes on completing Availability and Category:

When choosing the **availability** of the package, consider the following:

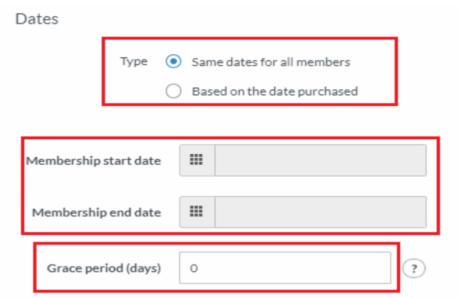
Anyone (public) – the package will be publicly displayed for anyone to purchase online.
Invite only (closed to new members) – The package will not be visible online to the public. An invite is needed to purchase this package.
Hidden (closed to everyone) – The package will not be available to anyone. Only administrators can add members.
Unavailable (archived) – The package is no longer available at your venue.

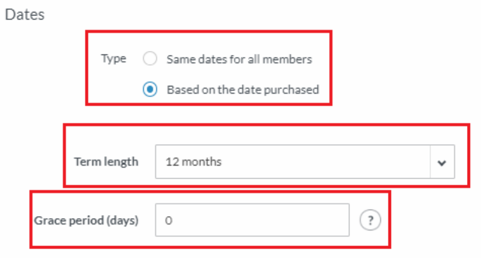
When creating a junior membership, change the **Category** to ‘Junior’ using the dropdown menu. When creating a family membership, select ‘Group’ as the **Type** and the category dropdown will automatically select ‘family’.

Section 2: Dates:

Next step is to determine the dates of the membership and whether it will be a fixed calendar date (same for all members) or based on the individual date of purchase.

Depending on the type chosen, enter the fixed start and end dates or select the term length – the screen will alter depending which option is selected:

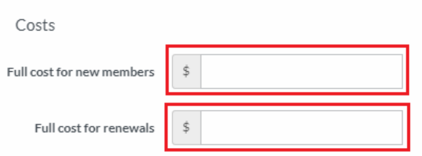




*Note: Clubs have the ability to provide a **Grace period** to allow members to continue being active after their membership has expired – this is used to give members some extra time to pay and renew their membership.*

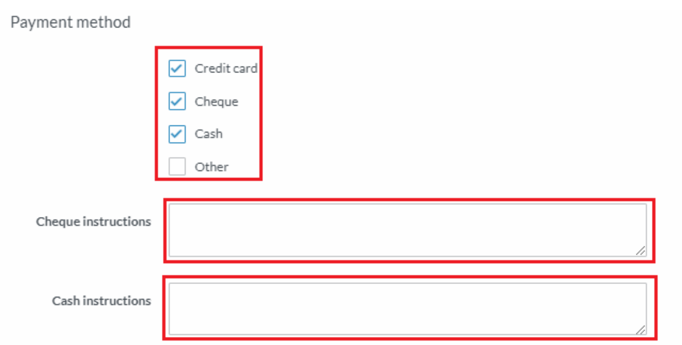
Section 3: Costs:

Once the membership details and dates are completed, the next step is to determine the costs of the package.



Note on complimentary memberships:
If a membership type requires no payment, such as an "Honorary membership", the package cost is set to $0.00. When members are added to these packages, the payment status will default to 'Paid'.

Section 4: Payment method:

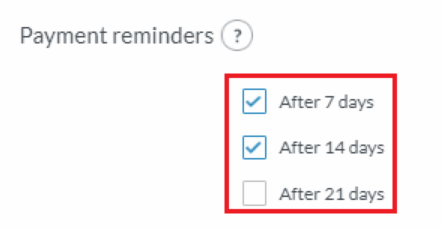


The next step is to select all the payment methods accepted for this membership package.

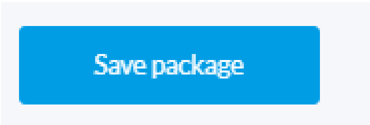
If cheque, cash and other methods are selected, you will have the option to add instructions for members.

Section 5: Payment reminders:

Final step is to decide whether to send payment reminders to members if they have not paid. An automatic reminder email will be sent to membership primary contacts 7, 14 and 21 days after a Payment Request was first sent.



Once all the details of the membership package have been entered, ensure to click **Save package** at the bottom of the page. The newly created package will now be listed in the **Membership** module and is available for purchase.

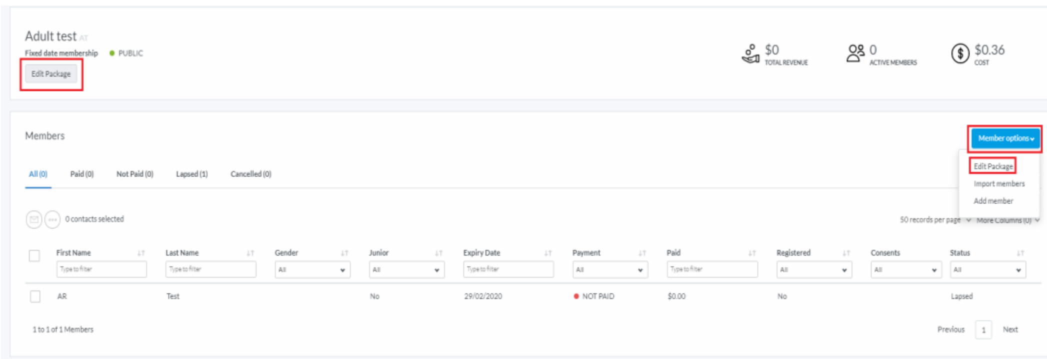


Note on setting up seasonal memberships:
If the venue uses seasonal memberships, at renewal time the Club should create a new membership package using details from your current package, e.g. Adult 2019.

It is then possible to import information from the current package into the new package. These members will roll into the new package with a payment status of 'Pending', until payment has been received.

Editing a membership package

To edit a membership package, click on the package to open it and click **Edit Package** (underneath the name of the package):



This can also be accessed by clicking on **Member options** and select **Edit package** from the drop-down menu.

All details of the membership package can be edited except for the **type** and **category** if there are already members that have been assigned to this package.

Discounting

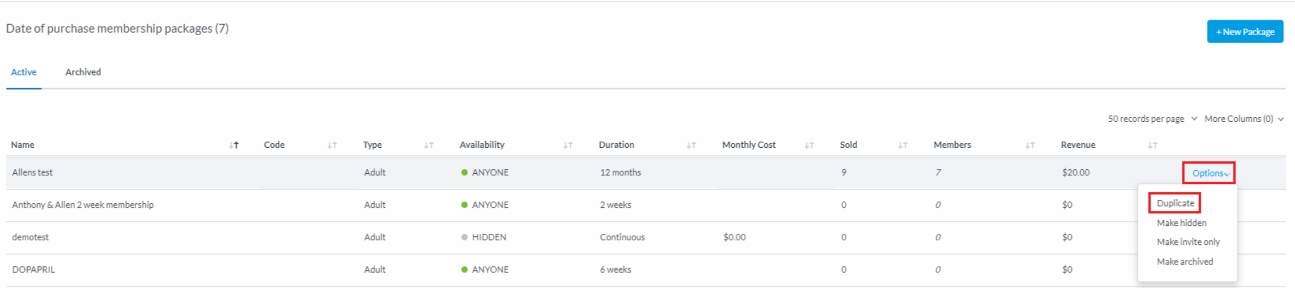
The **cost** of the package can be edited, which is useful to adjust the price of a fixed date annual membership for members who join throughout that year. After the cost has been changed, any member joining from that point will pay the new price.

NOTE: To ensure accurate historical reporting, it is recommended that the Club sets up new fixed date annual membership packages every year, rather than change dates/price of the 1 record each time - see next section.

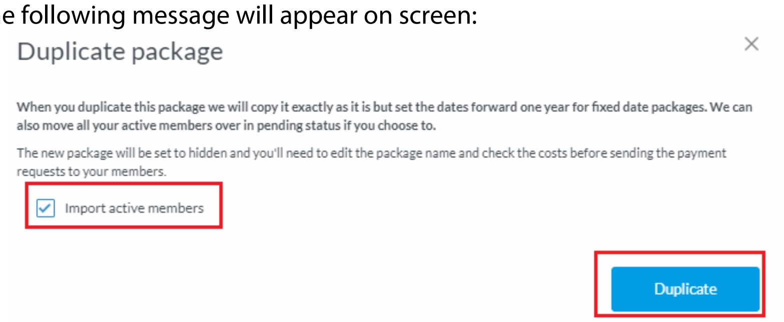
Duplicating a membership package plus importing members into the new package

For historical reporting purposes, Clubs need to set up fixed date packages each year with the new price and dates. To make this easier, it is possible to duplicate an existing membership package to create the next year's fixed date package, and to replicate a package 'based on the date of purchase'.

From the **Membership** module, find the membership package to be duplicated in the list, and click on the **Options** button to the right of that package. Click **Duplicate** from the drop-down menu:



The following message will appear on screen:

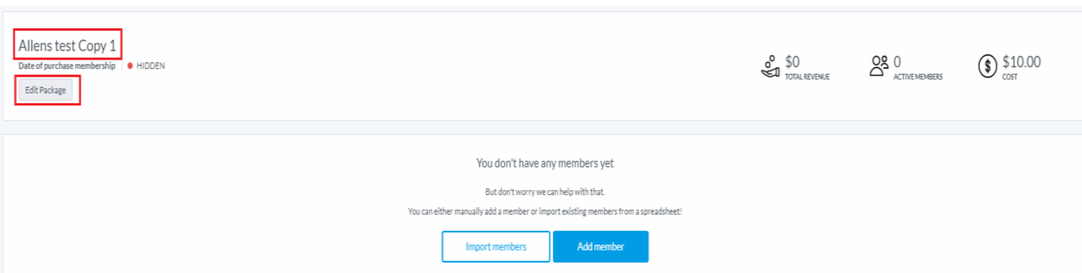


This enables Clubs to import all of the active members already assigned to the previous year's membership package at the point of creating the new one to save time. The box '**Import active members'** is automatically checked on. To create the duplicate package <u>without</u> importing the active members at time of setup, <u>uncheck</u> the box before clicking on the 'Duplicate' button. **NOTE:** the import can still be performed at a later stage.

After the onscreen confirmation '**Duplication Successful'** flashes up, the package that has been copied is displayed on screen, with 'Copy' and a number added to the name field - the number of times a copy has been made to date.

Click the **Edit Package** button to make changes to the copied membership package to reflect the new years' details. Ensure you click **Save** at the bottom of the page to apply the changes.

NOTE:
Duplicated packages automatically show as *Hidden* (availability), this can be changed by editing the package.

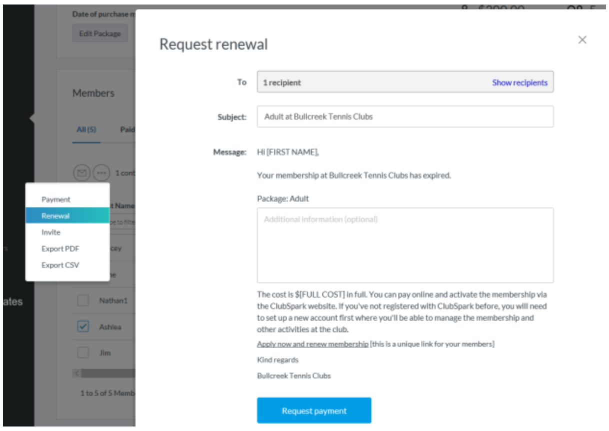


NOTE: '**Lapsed'** members in the previous membership package will NOT be imported during duplication. To import lapsed members from a previous year's package, follow the '**Importing from an existing package'** process in this document. This process enables Clubs to import both lapsed and active members at the same time.

Sending renewal reminders to members – request to join the new package and pay

Clubs with fixed date membership packages can send renewal reminders to members once the import process has been completed. From the **Membership** module, click on the membership package. Select all members by clicking the check box next to the **first name** column, or select members individually as required.

Click on the ellipses button **…** (three dots), then select **Renewal** to send the renewal email:



The subject line and top section of the renewal email is editable - Clubs can personalise the information to introduce the new membership package to their members if required.

The email will include the Club logo.

For any bracketed text e.g. [FIRST NAME], the system will insert the personalised information for each member individually.

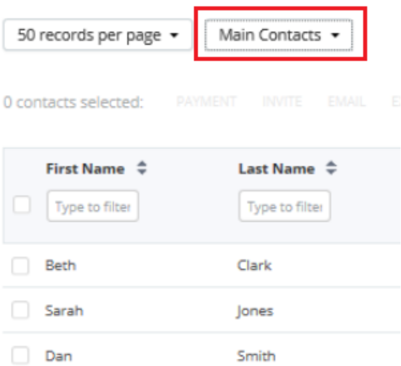
Click **Request payment** to send the emails to all selected members.

Member acceptance and payment
As soon as a member joins a new package, the Club Administrator receives an email notification advising payment has been made. The payment history is updated (to reflect amount paid and payment method).

If payment for the membership package was taken online, the status is automatically updated to 'Active'. If any other payment method is selected (cash, cheque or other), the Club is required to manually update the member's details and status within the membership package upon receipt of physical payment offline.

At the same time as renewing their membership, the member will be prompted to check the personal details held in the system and update if necessary.

NOTE: for Junior and Group packages, all renewal and payment requests must be sent to the **main contact** (purchaser of the membership). To view all the main contacts in a package, select **Main Contacts** from the drop down menu as shown below.

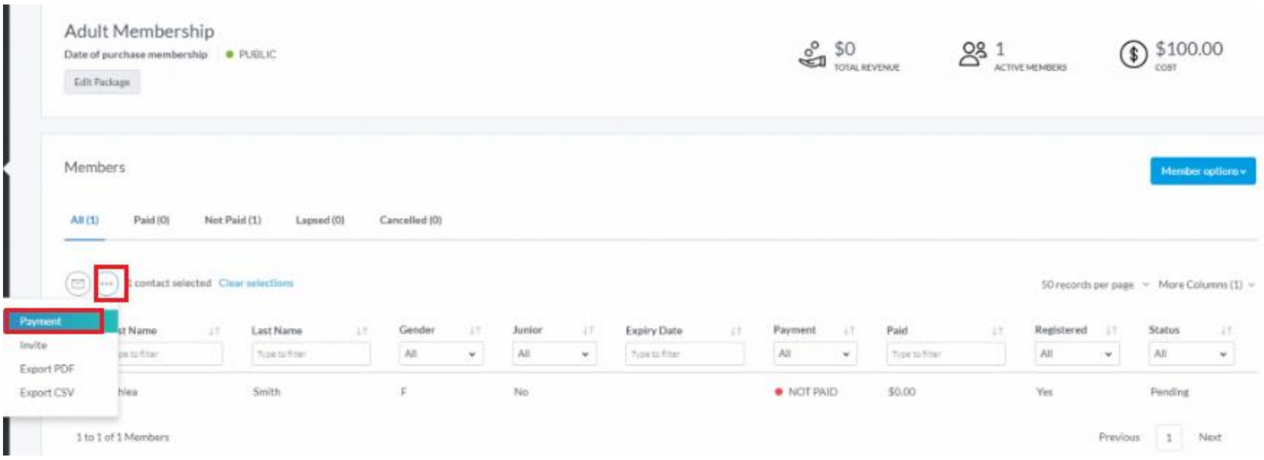


Sending membership payment requests at any time – payment is due/overdue

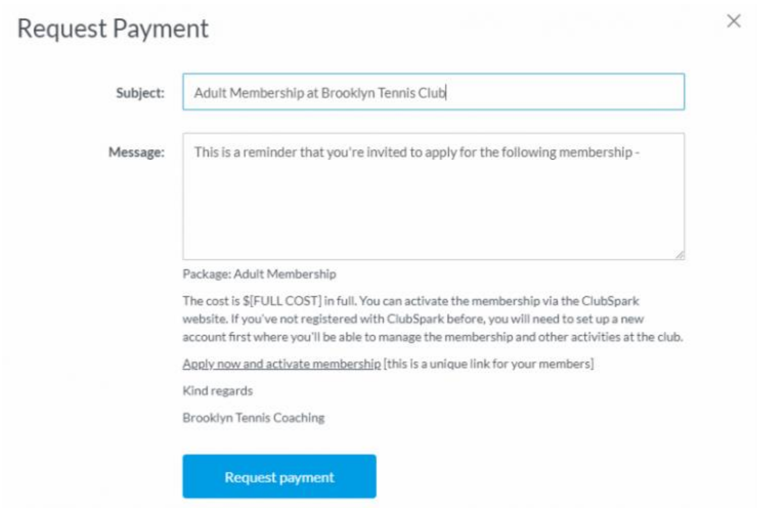
Clubs send payment requests for due / overdue payments on any membership package at any time.

From the **Membership** module, click on the membership package. Select all members by clicking the check box next to the **first name** column, or select members individually as required.

Click on the ellipses button **…** (three dots), then select **Payment** to send the renewal email:



If the membership package is not set up for Auto-pay, the following Request Payment template is displayed:



The subject line and top section of the renewal email is editable - Clubs can personalise the information to introduce the new membership package to their members if required.

The email will include the Club logo.

For any bracketed text e.g. [FIRST NAME], the system will insert the personalised information for each member individually.

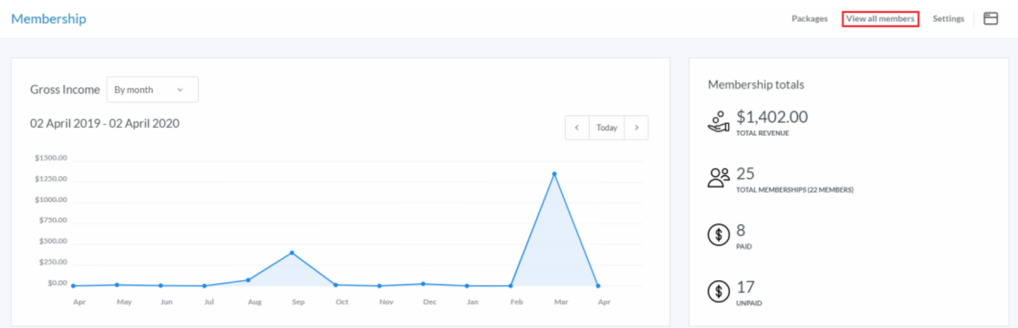
Click **Request payment** to send the emails to all selected members.

The member acceptance and payment process is the same as member renewals (see previous section).

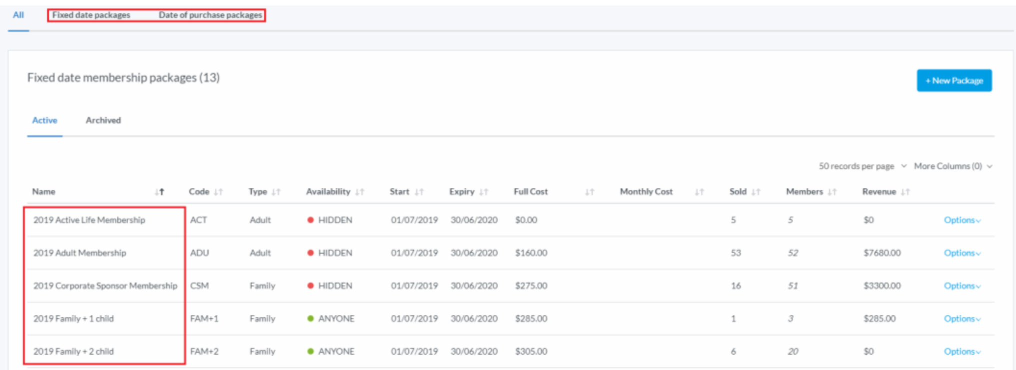
Managing members – viewing individual member records and summary statistics

When opening the **Membership** module, the top section displays the current membership statistics based on income, revenue, total memberships, number of assigned packages that are paid, and number currently unpaid.

To see all members in all membership packages, click **View all members** in the top right of the page.

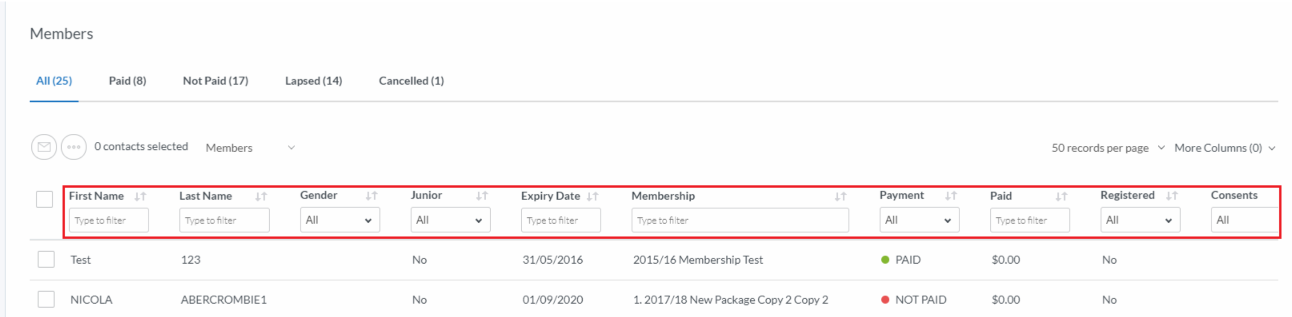


To see all members within each package individually, click on the membership package name in the subsequent windows.   The view can be filtered by membership type by selecting either **Fixed date packages** or **Date of purchase packages**:



Name	Code	Type	Availability	Start	Expiry	Full Cost	Monthly Cost	Sold	Members	Revenue	
2019 Active Life Membership	ACT	Adult	HIDDEN	01/07/2019	30/06/2020	$0.00		5	5	$0	Options
2019 Adult Membership	ADU	Adult	HIDDEN	01/07/2019	30/06/2020	$160.00		53	52	$7680.00	Options
2019 Corporate Sponsor Membership	CSM	Family	HIDDEN	01/07/2019	30/06/2020	$275.00		16	51	$3300.00	Options
2019 Family + 1 child	FAM+1	Family	ANYONE	01/07/2019	30/06/2020	$285.00		1	3	$285.00	Options
2019 Family + 2 child	FAM+2	Family	ANYONE	01/07/2019	30/06/2020	$305.00		6	20	$0	Options

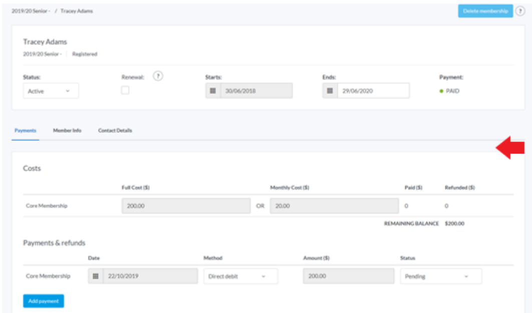
From within the membership package itself, use the filters and text boxes to define which members to view:



First Name	Last Name	Gender	Junior	Expiry Date	Membership	Payment	Paid	Registered	Consents
Type to filter	Type to filter	All	All	Type to filter	Type to filter	All	Type to filter	All	All
Test	123		No	31/05/2016	2015/16 Membership Test	PAID	$0.00	No	
NICOLA	ABERCROMBIE1		No	01/09/2020	1. 2017/18 New Package Copy 2 Copy 2	NOT PAID	$0.00	No	

Editing memberships for individuals

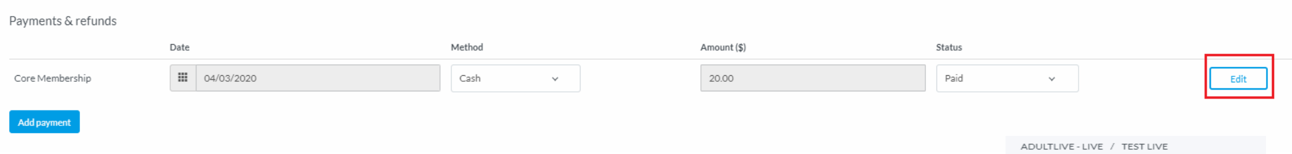
From the **Membership** module, click on any individual member within a membership package to see the details of that individual's current membership status:

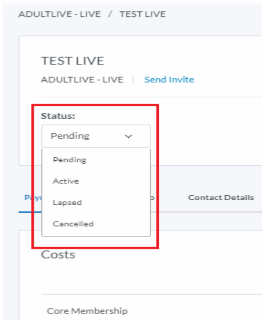


There are three tabs in the centre of the screen to change options.

By default the screen opens to show Costs and Payments & refunds

Editing payments:
To edit payment details, click the **Edit** button, as shown below, and overtype the fields with the updated information. The Edit button changes to a **blue Save** button when in editing mode – click **Save** to apply any changes before moving to the next screen.

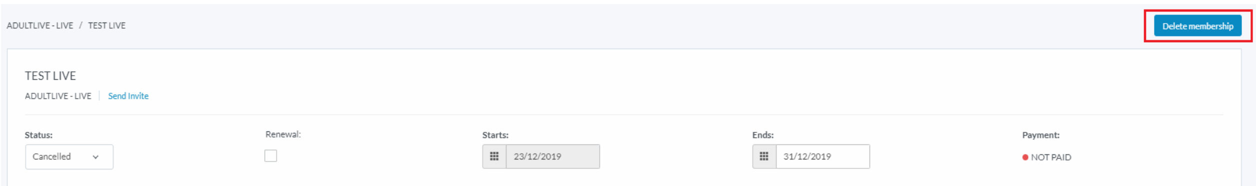




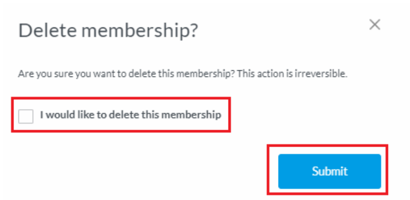
Changing member status:
From the top section of the screen, it is possible to change the membership status for the member by using the drop down menu as displayed.

For members to start receiving benefits through ClubSpark (i.e. member cost rates), their status must be set to **'Active'.**

Deleting a package from a member:
NOTE: In order to delete a membership from an individual, the membership **must not** be 'active', or have any payments against it (unless if they have been cancelled). Follow the above steps to **edit the payment** details to set the status to **'cancelled'**, and change the **membership status** to 'cancelled'. Once this has been done, the **Delete membership** button in the top right of the page becomes available:

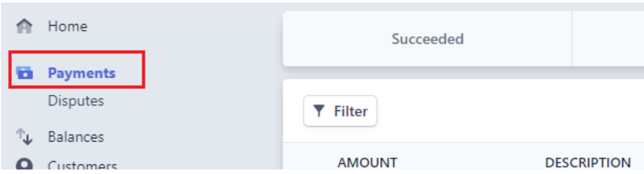


Check the confirmation box, then click **Submit**:



Refunding a membership

If a refund is required to be processed for a membership that has been purchased online via credit card, club admins must do so via their Stripe Dashboard.



Once logged into Stripe, click on **Payments** from the left hand side menu to find the charge to be refunded.

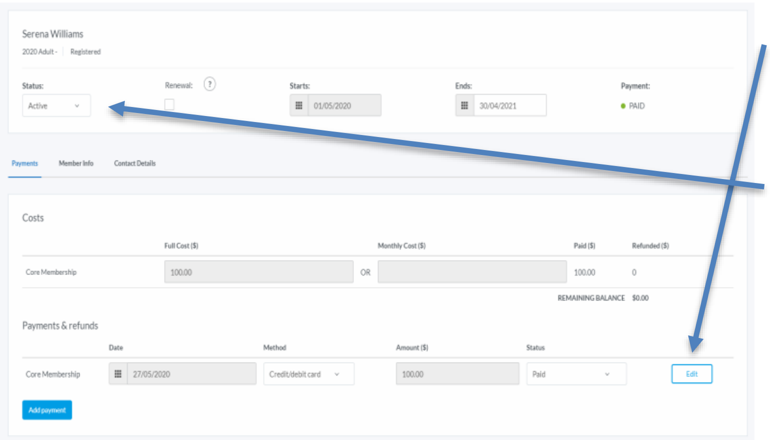
Click the ellipses button **…** (three dots) to the right of the charge and select **Refund charge**.

Enter the amount to be refunded - the default is a full refund. For a partial refund, enter a different amount to be refunded.

Select a reason for the refund, then click **Refund.**

NOTE: If you select 'Other' as the reason, you must provide an explanatory note that is attached to the refund.

Once you issue the refund via Stripe, you will want to reflect the refund within the software – From the **Membership** module, find the member you're refunding and click on the individual member within the membership package to see the details of that individual's current membership status



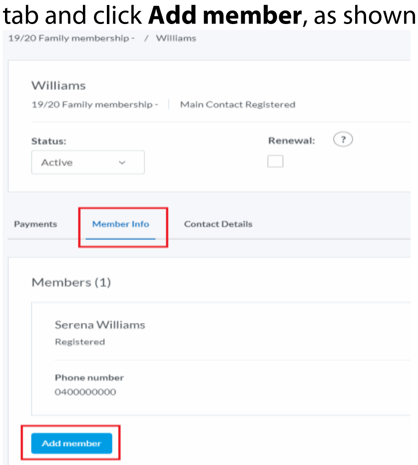
Click **Edit**, then change the Payment status using the drop down menu to **Refunded** then click **Save.**

Update the member status using the drop down menu to **Cancelled**. This will ensure that membership rules and pricing is no longer applied for this contact.

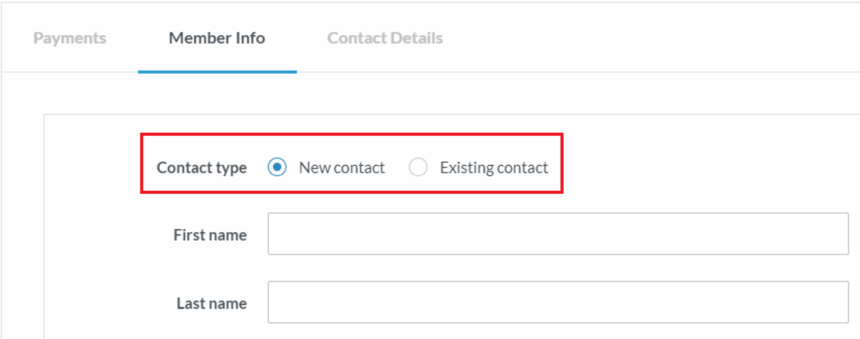
Adding family members to a family membership

Additional family members can be added to a family membership package purchased by the "Main contact" of the family, once the main contact has been allocated with the package.

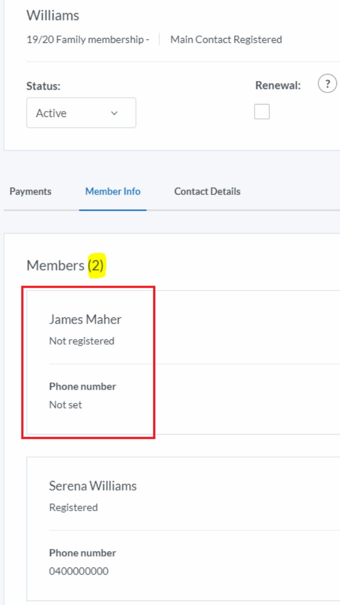
Select the main contact from the family membership package to bring up their profile, then select the **Member Info** tab and click **Add member**, as shown below.



Additional family members can then be added under the same family membership package as the Main contact (i.e. Head of the family). If the family member is already in the Contact list in ClubSpark, then select **Existing contact** and begin to search for their name. If they are not in the contact list, select **New contact** to enter their personal details, and click **Save** at the bottom of the page.



The new family member will now be listed as an active member under this family membership package.



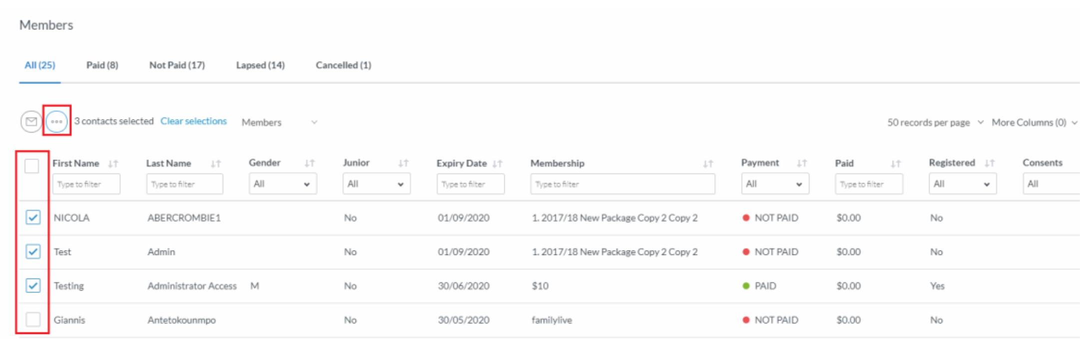
Exporting members assigned to a membership package

A list of members assigned to any membership package can be exported to CSV (Excel) and PDF format.

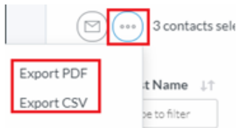
CSV format is useful for mail outs and complex reporting - it is highly editable and includes 39 information fields relating to the member's contact record information, membership package information, and communication preferences.

PDF format is useful for base reporting – it is non-editable, and includes the following fields: first name, last name, gender, membership package, expiry date, payment status, amount paid, registered Yes/No, and member status.

From the **Membership** module, click into the relevant membership package, and select members to be exported. To select all, check the box next to the First Name field. Otherwise, check the box next to the individual member's names as required. Once all relevant members have been selected, click the ellipses button **…** (three dots):



Options will appear to choose whether to **Export PDF** or **Export CSV:**



Emailing members from ClubSpark

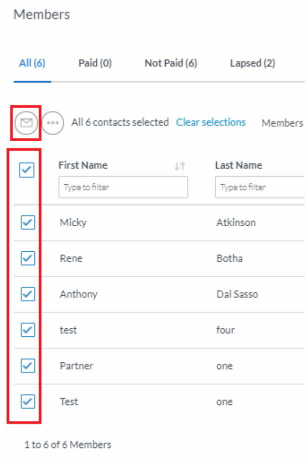
Clubs have the ability to email members directly from ClubSpark. Emails can be sent through the **Contacts** module or **Membership** module. If clubs wish to include **attachments** in the email, this must be done in the **Contacts** module.

Emailing from the Membership module:

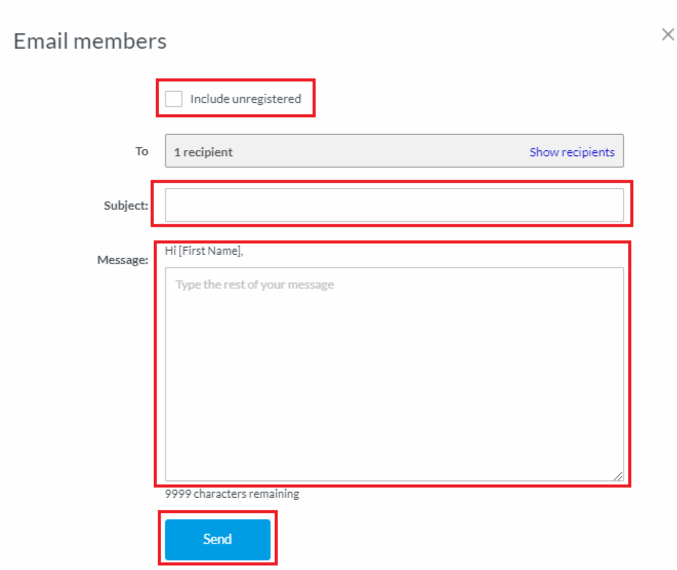
Clubs can send emails either within their membership package or by clicking **View all members** in the top right-hand corner.

Select all the members you wish to email by checking boxes next to each name individually or clicking the 'select all' box which appears next to the First Name column label. Once selected, click the **email** button above the selection boxes.

NOTE:
Emails will NOT be sent to junior contacts - their main contact will receive any emails sent. See the later section on 'Emailing and Juniors' for further information.



The following overlay will appear:



Ensure the **Include unregistered** box is checked to send emails to those who have **not yet registered** in ClubSpark (e.g. after importing member records)

By clicking **Show recipients**, a list of who is going to receive the email will be displayed.
NOTE: this number may be lower than the number of contacts selected for such reasons as: a member has unsubscribed from emails; a member does not have an email address associated with their record; the member appears multiple times; the contact is a junior.

Enter the subject and email content. The system will automatically enter the First name of the recipient on the email that they receive.

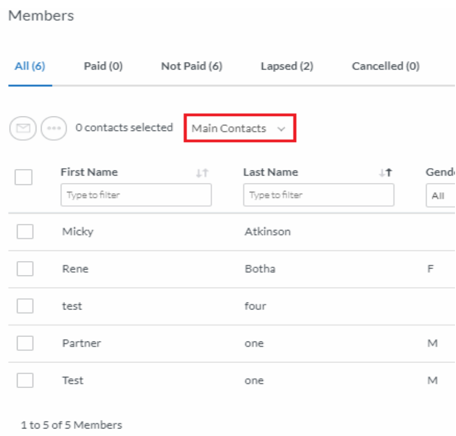
Once complete, click **Send** to issue to all recipients.

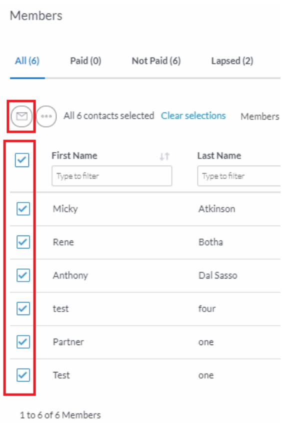
Emailing and juniors - restrictions

Emails are not sent directly to junior contacts in ClubSpark. To make contact regarding juniors and their memberships, the email is sent to their parent/guardian.

From the **Membership** module, select the junior membership package to display the list of assigned members.

Change the view to **Main Contacts** using the drop down menu:





Select all the parents/guardians to be emailed and press the **Email** button at the top of the check boxes.

Follow the same process as the **Emailing members in ClubSpark** section above.

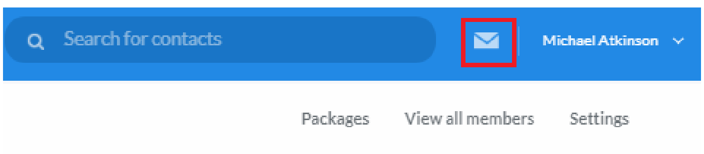
NOTE: remember to check the box **Include unregistered** contacts to ensure the email reaches all intended recipients. This is particularly relevant with juniors as their parents may not be registered users of the same club.

Viewing email history in the Admin area

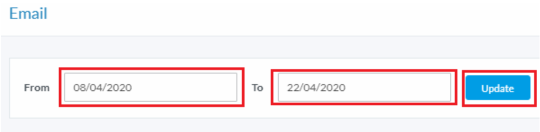
Clubs have the ability to track specific types of emails sent using ClubSpark via the **Email log**. The following types of emails are visible:

- **Membership emails**
  - Membership renewal requests
  - Membership payment requests
- **Venue emails**
  - Custom emails to contacts, users & members
  - Invitations to register
- **Programs emails**
  - Program attendees email

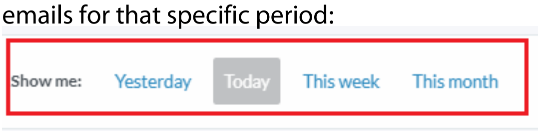
To access the email log from within the **Admin area**, click on the **Envelope** icon in the top right hand corner of the screen next to login name:



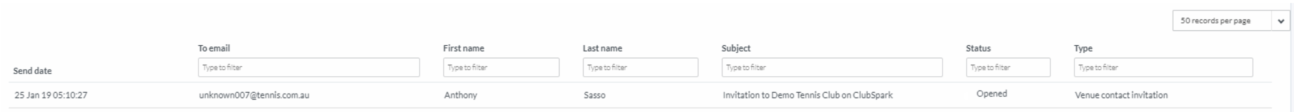
Emails will display according to the date range entered in the 'From' and 'To' date boxes by default. Enter a date range to search for emails within a specific period, then click **Update**:



Alternatively, click on one of the 'Show Me' options on the Email log page - this will automatically provide a list of emails for that specific period:



The email record displayed includes: send date, email address, first name, last name, subject heading and status.



By clicking on any individual email, an overlay will show the full text that was included in that email.

Email Status types:

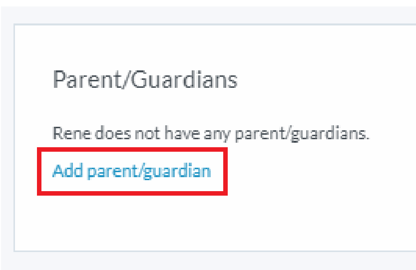
- **Pending** - the email is in a queue, waiting to be sent out by the ClubSpark system.
- **Sent** - the email successfully left the ClubSpark system, and is attempting to reach the recipient address.
- **Opened** - the email was browsed by the recipient - assumed to be read.
- **Clicked** - the recipient has clicked one or more links within the email. **NOTE:** links are only clickable depending the recipient's browser - some recipients may need to 'copy and paste' the link into an internet browser to see the file / web location.
- **Blocked** - the email did not leave the ClubSpark servers due to a permanent error e.g. an invalid or non-existent email address, or the recipient reported ClubSpark as spam. Some emails may show the status **'pre-blocked'** - means there was an existing error with that email address that the ClubSpark system has previously logged.
- **Bounced** - the email has been returned with an error and could not be delivered: e.g. recipient's inbox is full, recipient server is not available, email address does not exist, etc.

Attaching a main contact to a junior contact

When a parent/guardian purchases a membership for their child, the parent/guardian should be saved as the 'main contact', although the membership package is linked to the child. The main contact is the person that will receive any emails from ClubSpark when the junior is emailed using the processes described above.

Clubs have the ability to manually link a junior contact to their main contact/parent/guardian if this is not in place.

From the **Contacts** module, search and click the junior that requires a main contact to be added.



Click **Add parent/guardian** at the bottom of the page.

Please Note: This box will only display for those contacts who have the Junior Tag

Enter the necessary details of the parent/guardian and click **Submit**. The screen reverts back to the junior's contact record, which should now display the relevant parent/guardian added.

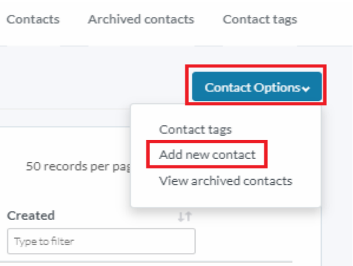
Contacts Module

The contacts list will consist of members from the club and anyone who has either booked a court, registered to an event or a program available through the ClubSpark platform.

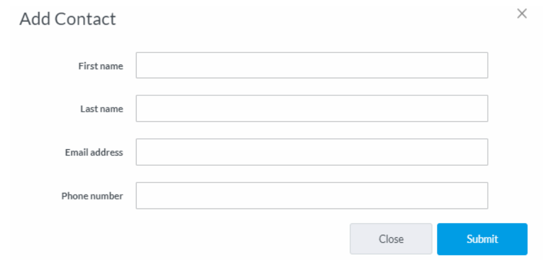
Access the Contacts module by clicking on **Contacts** from the left hand side menu.

Adding a contact

To add a contact to the Contact list, select **Contact Options** in the right hand corner, then click **Add new contact**.



You'll then be prompted to enter the contacts details, as shown below.



NOTE: Not all contact fields are required to be entered, when adding a contact in the admin area.
This is to ensure that only known data is entered into the system.
When an invitation is sent to the contact, they will then be required to enter mandatory fields to create an account.

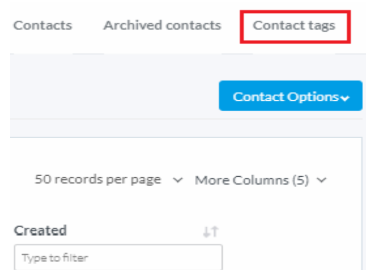
Click **Submit** once the details have been added and then you'll be able to view the contacts profile or make edits to add further information such as date of birth, gender and address details or assign roles and tags.

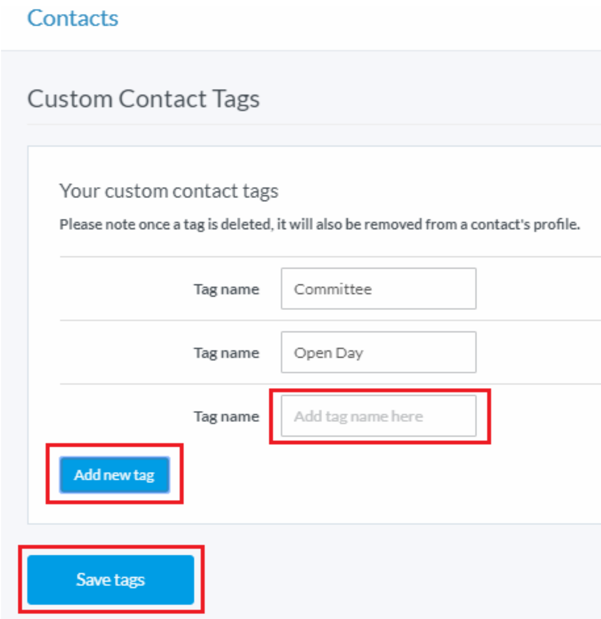
Contact tags

Clubs have the ability to add tags to contacts, which allows for identifying and communicating to specific groups easier and helps to save time when managing large contact lists.

Creating custom tags

To create a custom tag(s) click **Contact tags** in the top right corner of the **Contacts** module, as shown below.





Simply click **Add new tag**, then enter the **Tag name** in the text box. Remember to click **Save tags**, once all custom tags have been added.

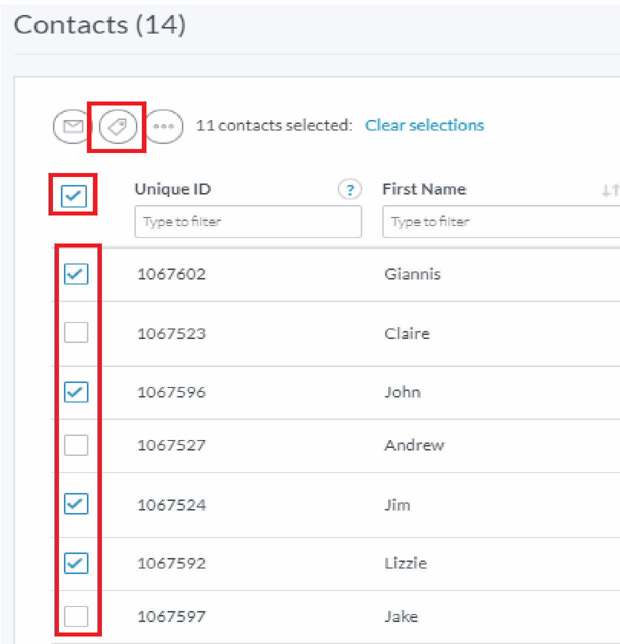
Once a tag is added, you will then be able to assign the new tag to contacts.

You will also be able to delete a tag from this page, by clicking the **Delete** button on the right of the row to the tag you're wanting to delete, then click **Save tags** to make the deletion.

NOTE: Once a tag is deleted, it will also be removed from a contact's profile.

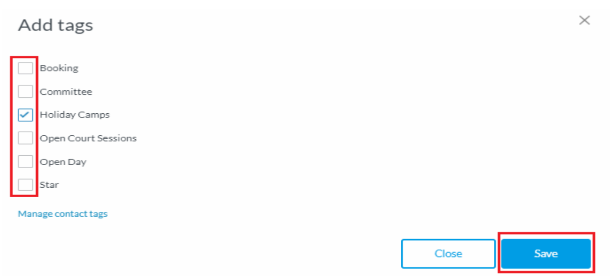
Adding tags to one or more contacts

To assign a tag to all contacts or selected individuals, head to the **Contacts** module and select all contacts by placing a tick in the box at the top left-hand corner or by ticking the box to the left of their 'Unique ID'.



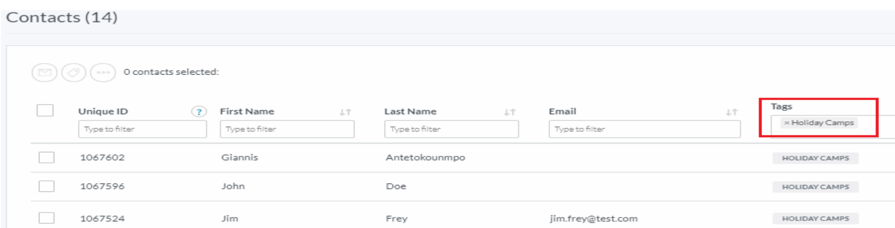
When all contacts have been selected, click on the **Add tags to contacts** button (tag icon) at the top of your contact list and the below overlay will appear.

Tick/select the tag(s) you wish to apply to the contacts selected, then click **Save** and then click **Close**.



You will now find the tag(s) have now been successfully applied to the contacts.

Use the 'Tags' column on the filter bar along the top of the contacts to filter the contacts by tag, as shown below.

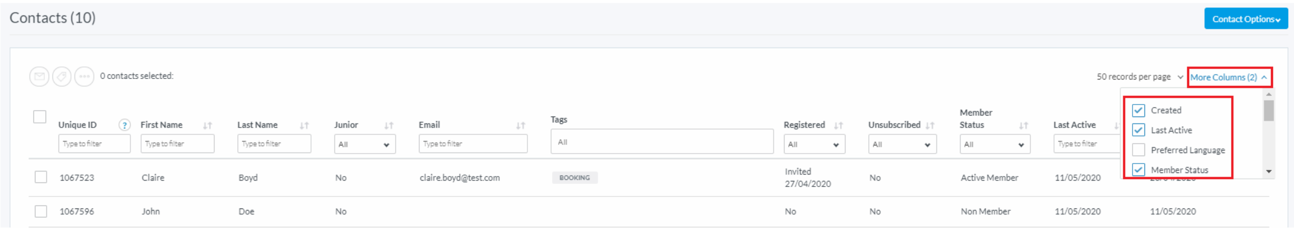


With this filter applied, it enables clubs to easily select a group of contacts to then perform tasks such as emailing or exporting a report.

Searching for contacts

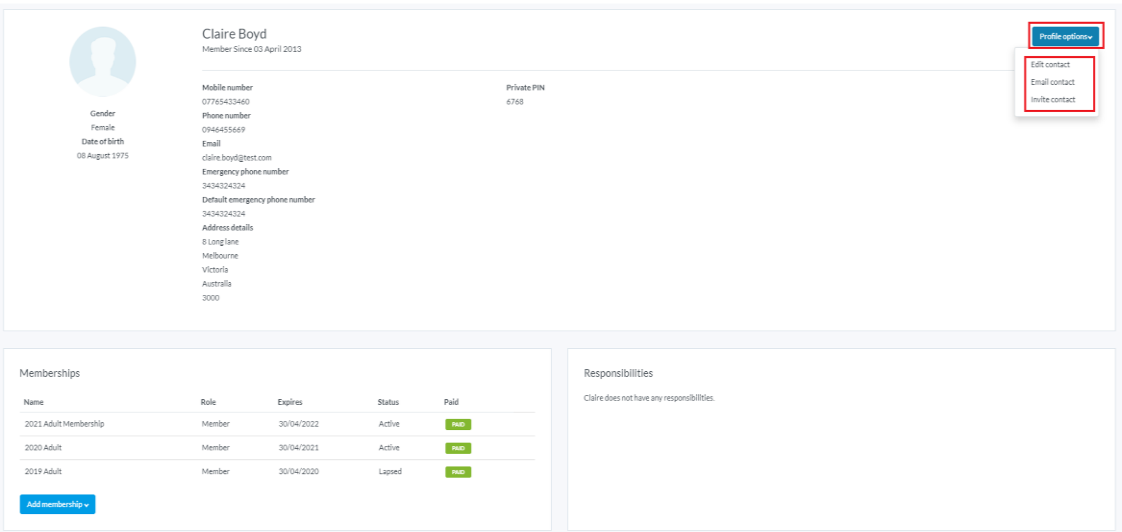
Enter a value in the filter boxes to define the search of contacts as shown below.

The columns displayed can be customised by clicking **More Columns** on the right of the table and then ticking the boxes to the columns you want displayed.



If you click on a contact, you will be able to view the contacts personal details, membership packages, responsibilities and tags.

By clicking **Profile options** on the right hand side of the page, as shown in the image below, you will also have the ability to email the contact, invite the contact (if they are unregistered) and edit the contact to update details or add responsibilities or admin roles.



Sending invitations to contacts is important to ensure when they register an account with ClubSpark that it is linked with the contact record that appears in the Contacts list. This is particularly important with members of the club.

By members registering their ClubSpark account via the unique link within the invitation email that is sent by club admins, this will ensure that the system recognises them as a member, so if they were to book a court online or register to a program, they will be given discounted rates as a member.

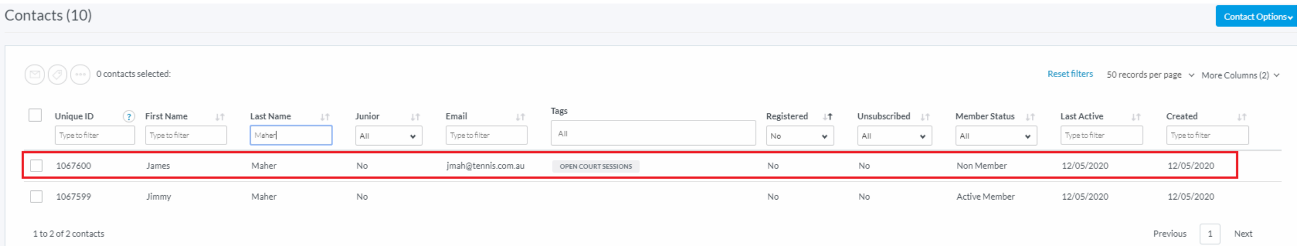
Members can receive their unique link to register (invitation email) in a number of ways via the ClubSpark platform, such as:

- Membership payment requests and/or reminders,
- individually via the Contacts module, or
- in bulk through the Membership module (either all members or by specific membership package)

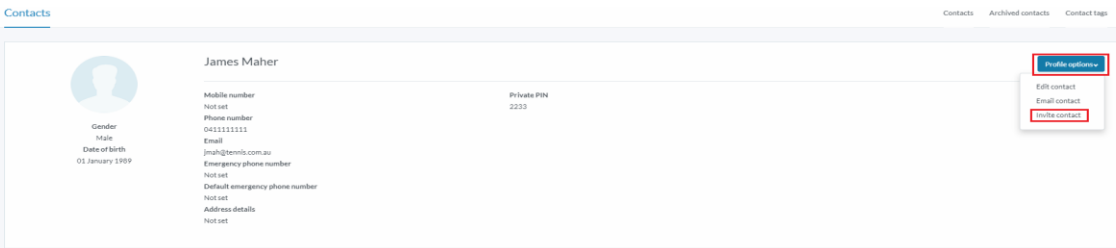
Note: Contacts have a month to action the invitation email, before the invitation becomes expired and a new invitation is required to be sent.
Its also important to note that unique email addresses are required, therefore you will need to determine which contact record will need to be sent the invitation to register for contacts who share email addresses (i.e. family members).

Sending invitations individually

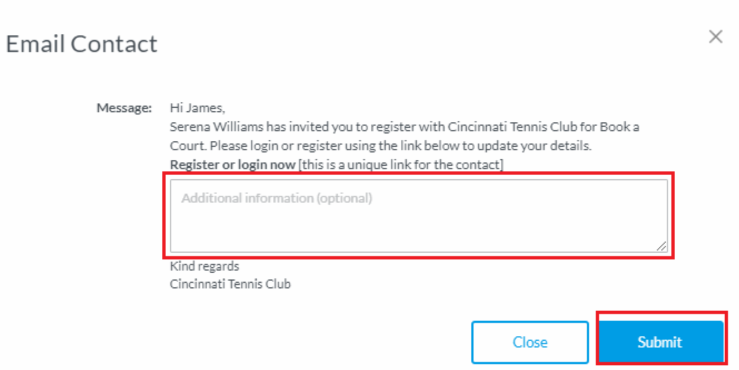
In the Contacts module, use the filters to search for the contact that you're wanting to invite, then click on their profile.



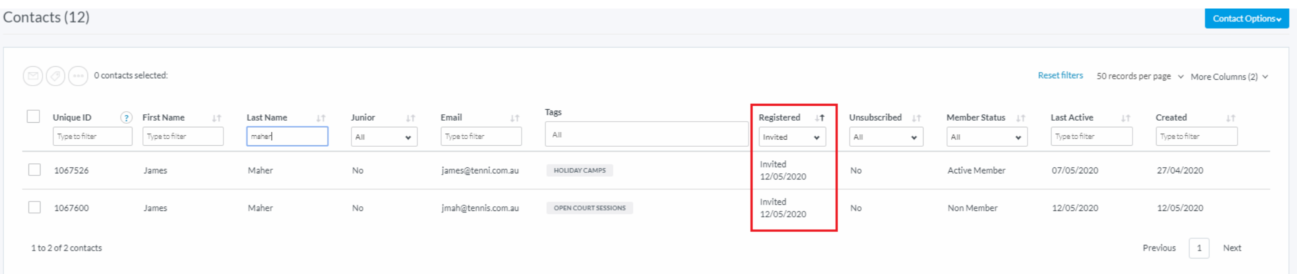
Click **Profile options** on the right hand side, then click **Invite contact**, as shown below.



You have the option to add additional information into the invitation email that will be sent to the selected recipient. Then click **Submit** when you're finished and the invitation will be sent.

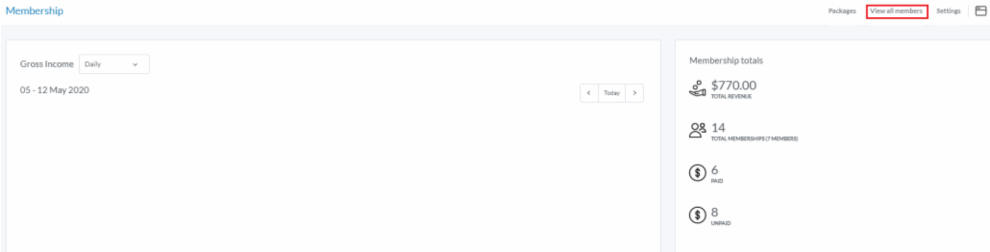


If you head back to the **Contacts** page, you can filter your search to display contacts that have been 'Invited' by using the drop down menu under the 'Registered' column.

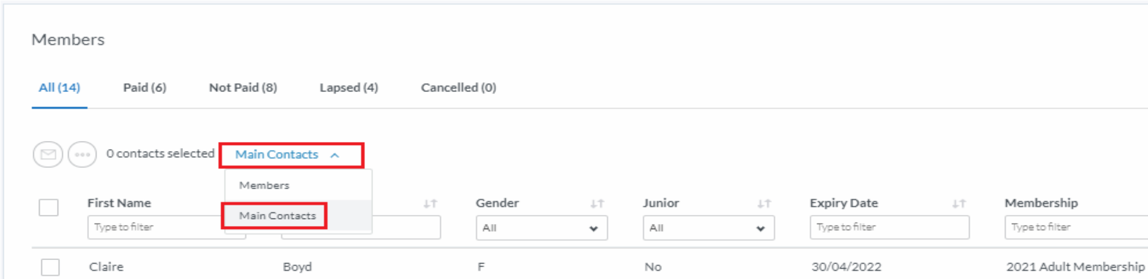


Sending invitations in bulk to all members

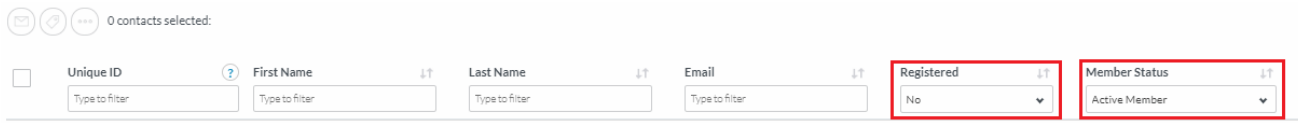
To send invitations to members to register a ClubSpark account, head to the **Membership** module in your admin area, then click **View all members** in the top right.

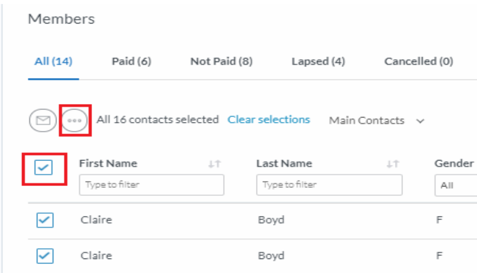


Filter the search of members, by selecting **Main Contacts** in the drop down menu, as shown below.



Then apply the necessary filters to show contacts only with 'No' and 'Active' under the 'Registered' and 'Member Status' column, as displayed in the image below.



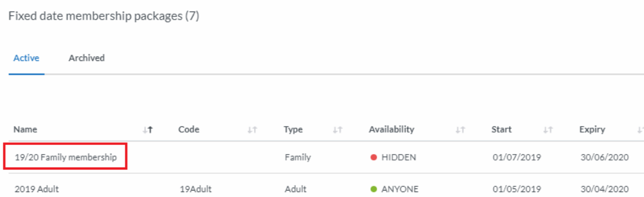


Then select all contacts using the check box next to the 'First Name' column or select individual contacts using the check box next to each contact. Then click the ellipses button **…** (three dots) and click **Invite**.

You will have the option to add additional information into the invitation email that will be sent to the selected recipients. Click **Invite** to send the invitations.

Sending invitations in bulk via membership package

From the **Membership** module, click on the membership package name.



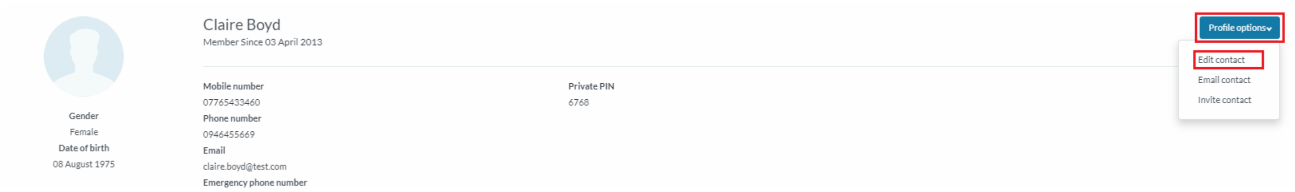
Then follow the same steps above of applying the necessary filters and selecting the appropriate contacts to send an invitation.

Adding responsibilities and admin roles

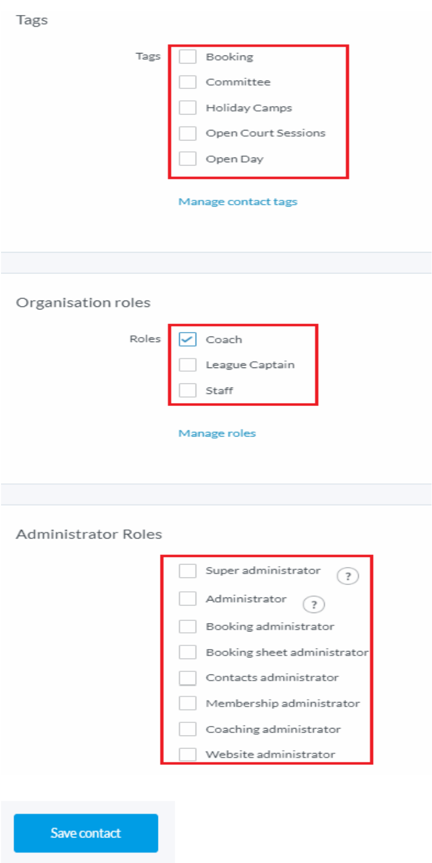
Before you can assign a booking responsibility to a contact, you will need to first set up your responsibilities. Refer to the steps outlined in this user guide under the Bookings module to set up your responsibilities.

To provide a contact with an administrative role (in addition to the **Administrators** module) or a booking responsibility, head to the **Contacts** module and use the filters to locate the contact you are wanting to provide such account levels and click on their profile.

Then click **Profile options** on the right and select **Edit contact**.



You will then have the ability to edit contact details, assign a tag, add roles/responsibilities or administrator roles to the contacts account by checking the appropriate boxes.

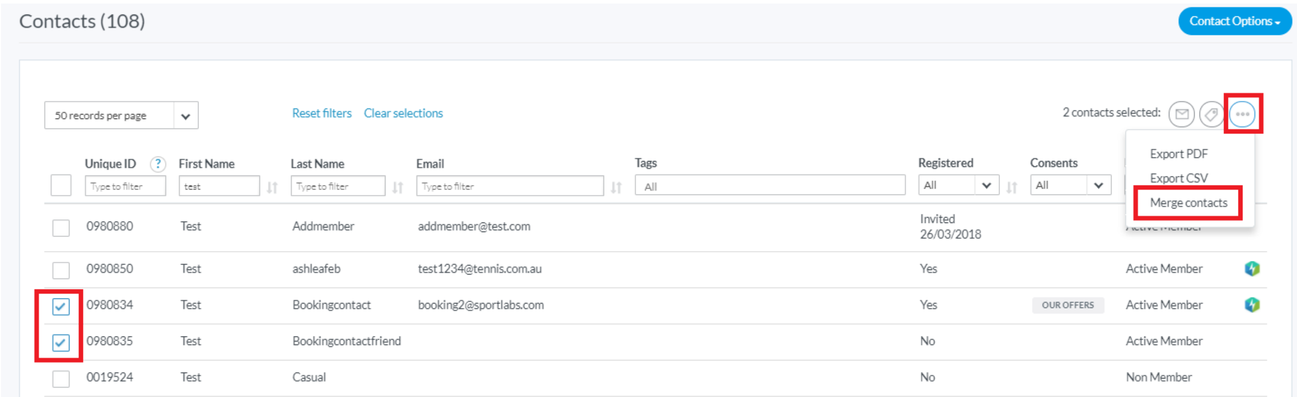


Once you have checked the appropriate box, ensure you click 'Save contact' at the bottom of the page to apply changes.

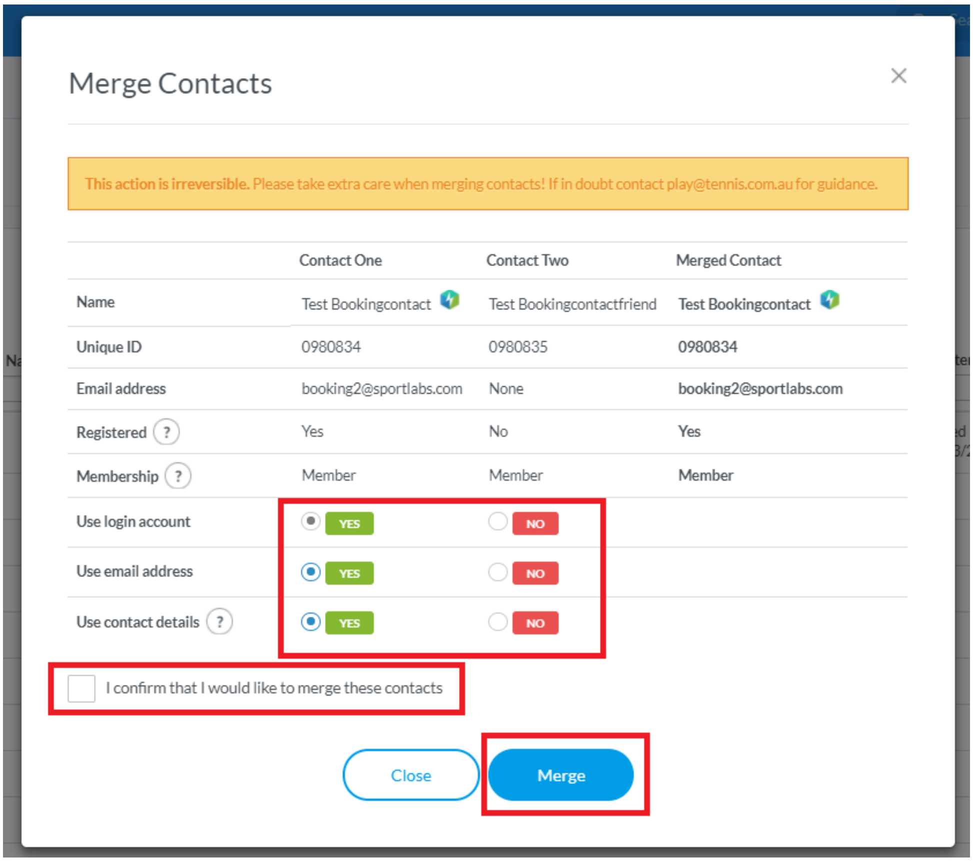
Merging Contacts

Club administrators have the ability to merge contacts in the clubs contact list.

Head to **Contacts** in the admin area and use the filters to locate the two contacts you want to merge, check the box next to their 'Unique ID', then click on the ellipses button … (three dots) and click 'Merge contacts' as shown below.



Check the appropriate box for the details, which you intend to keep, then confirm your changes and click 'Merge'.



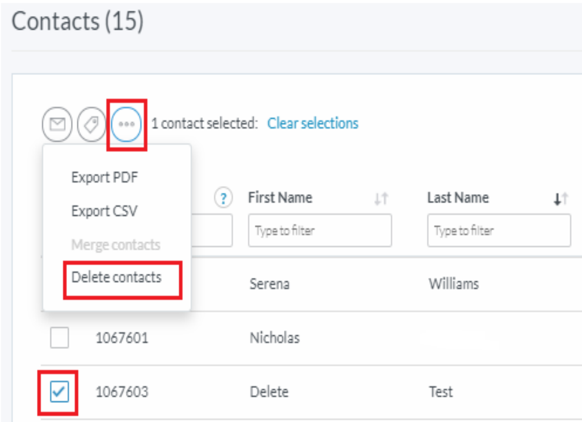
NOTE: This action is irreversible. Please take extra care when merging contacts! If in doubt contact play@tennis.com.au for guidance.

Deleting or archiving contacts

Clubs have the ability to delete contact(s) from their contacts list. A contact can only be deleted if they do not have any administrator roles, an active membership or main contact – to delete a contact with any of these, you will need to edit the contact to remove all roles and/or cancel their membership.

Deleted contacts will be archived for 30 days and then deleted permanently. This will remove the contacts from the clubs records and anonymise all historical transactions related to this contact.

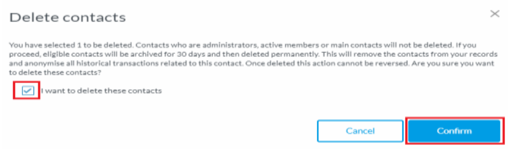
NOTE: Once deleted and the 30 days of being archived has passed, the contact cannot be restored. Please take care when deleting contacts.



Within the **Contacts** module, select the contact(s) you wish to delete by ticking the box next to the 'Unique ID' column.

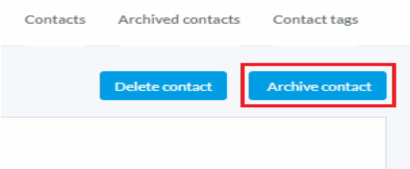
Then click the ellipses button … (three dots) and click **Delete contacts**.

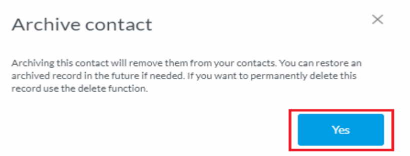
The following overlay will appear, tick the box to confirm your deletion, then click **Confirm**.



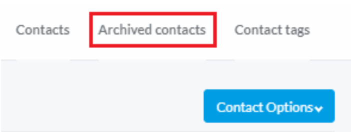
Clubs also have the ability to archive contacts (without permanently deleting them after 30 days), if they're unsure about deleting a contact. Archiving contacts must be done individually by clicking on the contacts profile, clicking **Profile options** and then **Edit contact**.

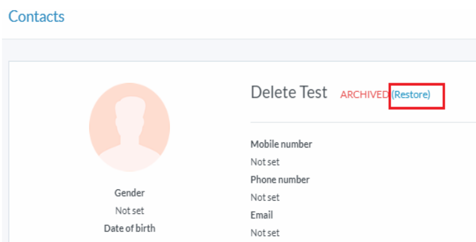
In the top right hand corner of their profile, click **Archive contact**, then click **Yes** in the next overlay to archive the contact.





To view contacts that have been archived or deleted, click **Archived contacts** in the top right corner of the **Contacts** module, as shown below.





By clicking on an archived contacts profile, clubs will have the ability to restore the contacts back to the active contacts list, by clicking **Restore** as shown below.

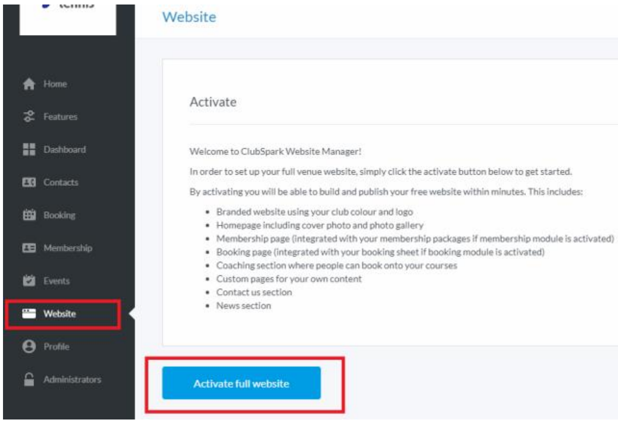
Website Module

Activating the ClubSpark website

The first step in using the ClubSpark website module is to activate the website.

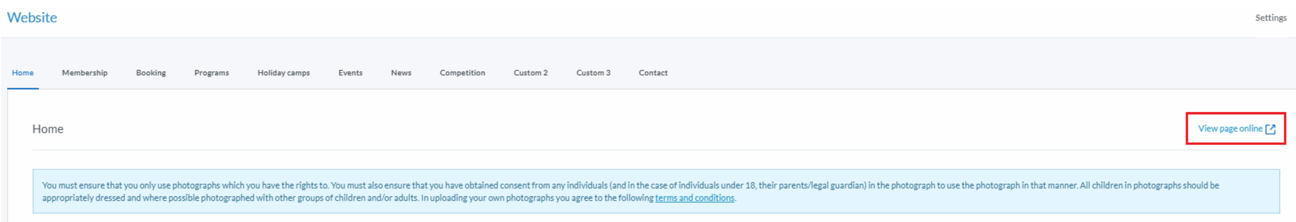
NOTE for current Book a Court Clubs: by activating the full website, this will replace the current Book a Court landing page. Therefore, existing Book a Court venues need to allow sufficient time to set up the website when activating this module to avoid issues.

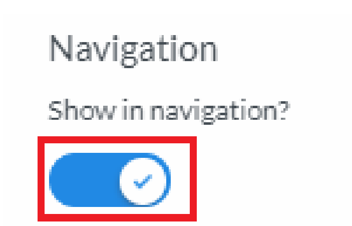
Select the **Website** module from the left hand side menu, and then click **Activate Full Website**.



After the website has been activated, a website address will be issued and content can be begin to be added.

To view the website at any time click on the **View page online** button at the top right of the Website module.





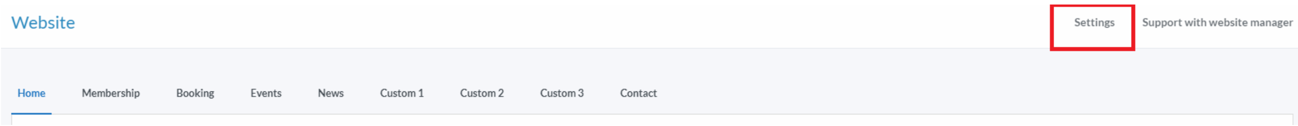
NOTE:

The **Show in navigation** slider button needs to be **set to blue** (on) in order for the page to be live on the website – this should be done once drafting for the page has been completed.

To **hide a page** either during construction, or to remove it in the future, turn this slider to grey (off) and **save** changes.

Website settings

From the **Website** module, click the top-right **Settings** button to update the core fields affecting the look and feel of the Club's personalised website:

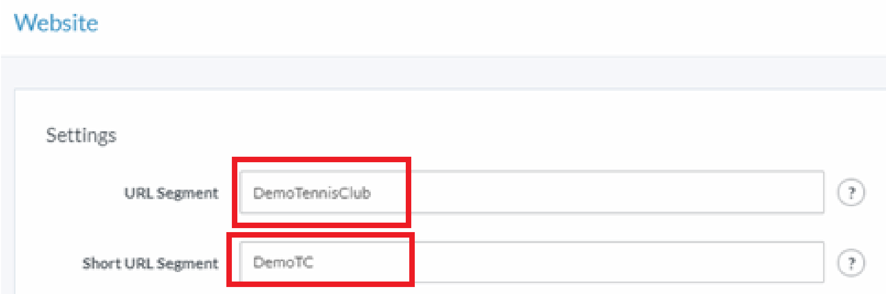


URL Segment settings

The URL segment is used to create a unique web address for your ClubSpark website - this is visible in the web browser address bar. To change the text, overtype the field with the desired information. Once saved using **Save page changes**, the website will be updated

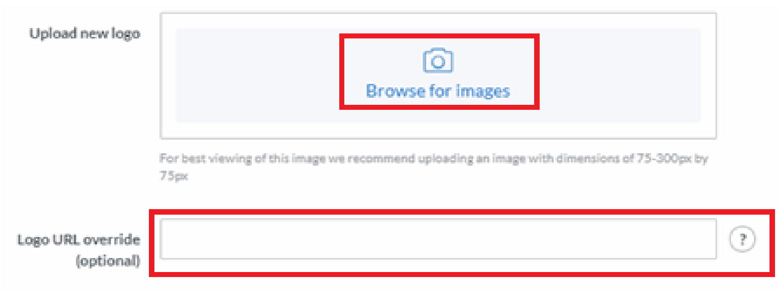
The URL segment format should be the club name without spaces e.g. DemoTennisClub

The **Short URL segment** can be used to create a unique short web address for the venue. This can be used as an alternative on social media, flyers, posters, or anywhere else where space is at a premium e.g. DemoTC



Setting the Club logo

To add the club logo click **Browse for images**. **NOTE**: the file format for uploading the logo must be JPG, PNG or GIF.



NOTE: Logo URL override – using logo to link to an external website

Clubs can also link to an external website using the **Logo URL override** (optional) – when consumers click on the club logo, they will be taken to the external website rather than the Club's ClubSpark Home page.

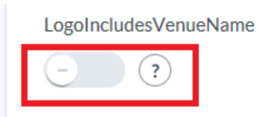
If the venue operates a separate website that links to the ClubSpark pages, then 'logo override' is a convenient way to direct users back to the venue website after their ClubSpark transactions have completed.

Enter the web address of the destination into the Logo URL override field, and click **Save page changes**

Setting the primary colour of the website

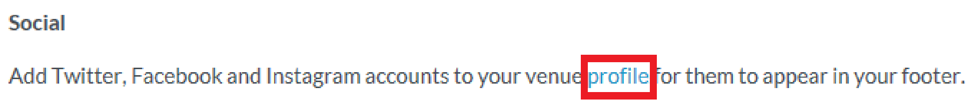
The **primary colour** of the website and header style can be changed by the Club to personalise the appearance. **Header style** then dictates the blend – use the radio buttons to choose between having a white background with your chosen primary colour as your text, or having your chosen primary colour as your background with white text:

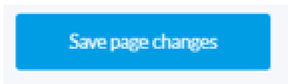
The **Logo Includes Venue Name** feature can be used if the Club logo image already includes the venue name. If the slider is ticked on (blue), the venue name will not be displayed in text next to the logo in the website header.



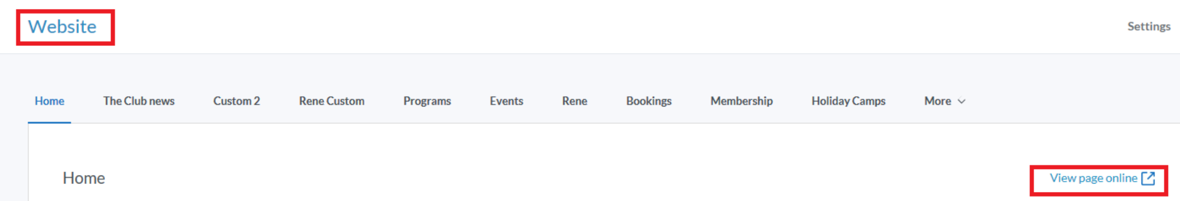
Social media links for the Club

Click on the link back to the venue setup profile page to add / update social media account details to appear in the footer of the website homepage:



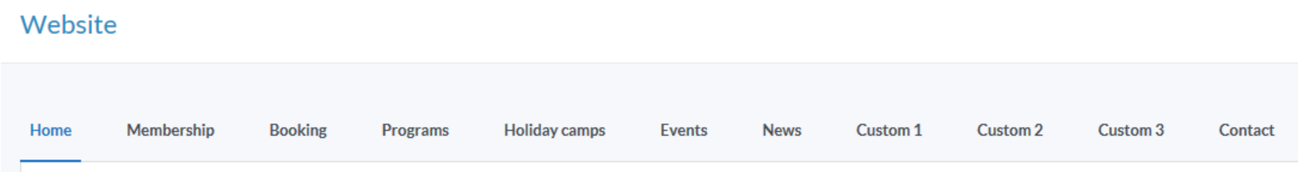
Once all changes have been made, click **Save page changes:** 

To view the website with these changes applied, click **Website** and then click **View page online:**



Overview of the Website pages available

Depending on the ClubSpark modules that are activated for a Club, different website pages become available for editing in the **Website** module:

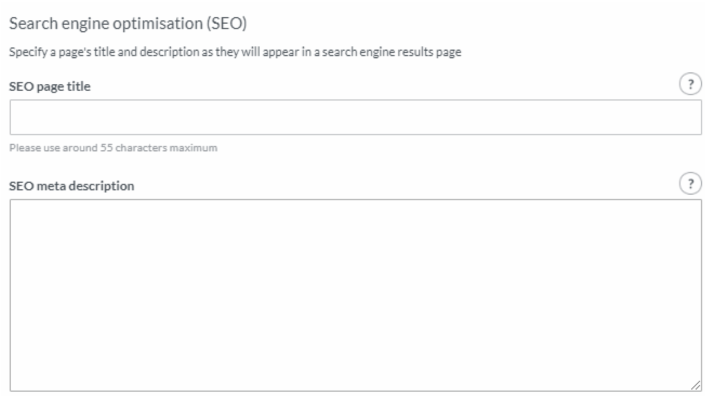


Page name	Description
Home	Home page for the Club – logo, welcome text, introduction, photos, partner logos
Membership	*Only visible if Membership module is activated – membership package information, and ability to purchase any packages that have been configured to be purchased online
Booking	*Only visible if Booking module is activated – used for Book a Court for court hire purposes
Programs	*Only visible if Programs module is activated – see Programs section below
Holiday camps	*Only visible if Holiday Camps functionality is activated
Events	*Only visible if Events module is activated - see Events section below
News	Enables Club to add news articles to be displayed
Custom 1, 2 & 3	Enables Club to decide web page name and contents
Contact	Information page for how to contact the Club and Directions

Website Home Page

On the Home page of the Website, clubs can provide information about the venue, add cover photos, include a photo gallery and display partners. In addition, the Home page will also include a map showing the location of the venue.

Enter the Search Engine Optimisation page title and meta description. These details are what appear on a search engine (e.g. Google) when a search is entered.

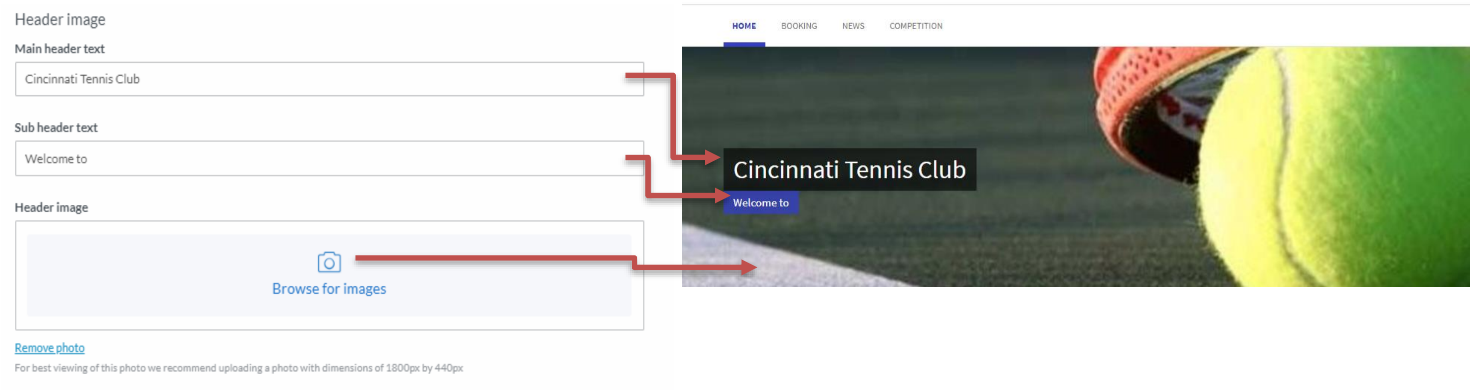


Note:

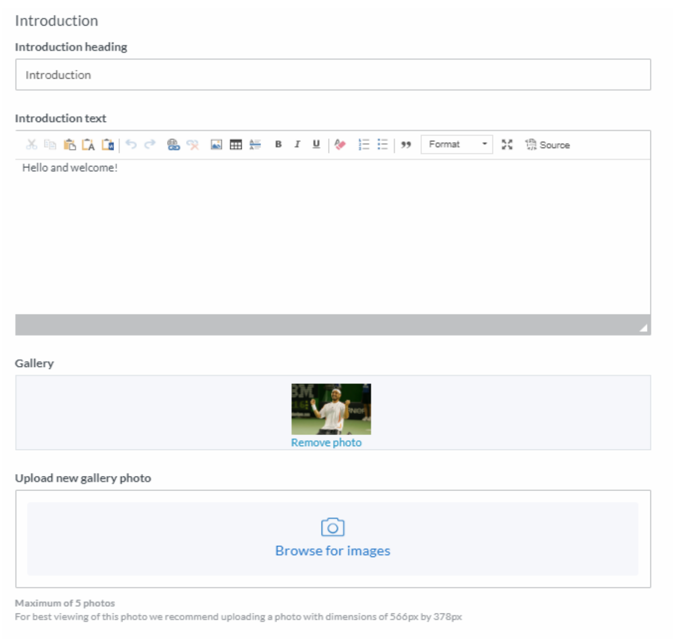
SEO page titles are displayed on search engine results as the clickable headline for a given result, as well as in the browser. This is important for usability, SEO and social sharing. The title will be prefixed by your venue name.

Entering **SEO meta descriptions** helps visitors click through to your page – especially if it's relevant to the contact of your page.
It's best to keep meta descriptions long enough that they're sufficiently descriptive.

Enter the Main header text, sub header text & header image. See the below image to understand how this is displayed visually on the Home page:



Enter the introduction heading and text - use this field to welcome people to the club:



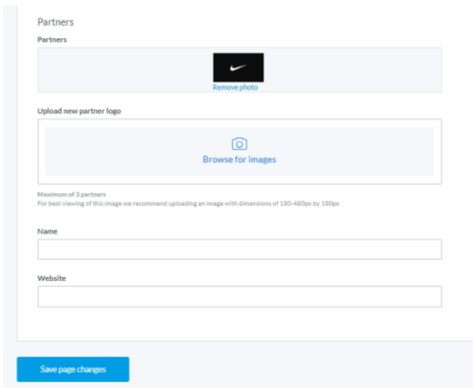
NOTE: Utilise the tool bar above the text box to change format and size of the font that will be displayed, and/or to include hyperlinks to other websites.

Use the **Gallery** section to add photos. A maximum of 5 photos can be added, which will play as a slideshow on the Home page.

To add photos, select **Browse for images**, then click **Upload**, select the photo from your computer then once added, double-click the image for it to be uploaded on the page.

NOTE: photos must be added **one at a time**. When adding a second image, ensure to click **Save page changes** at the bottom of the page after each one to add the new image to the gallery.

Lastly, 'partners' or 'sponsors' can be displayed at the bottom of the page. A maximum of 3 partners can be added:



Similarly to the gallery function above, to add a photo, select **Browse for images**, then click **Upload**.

Find the right image and double-click for it to be uploaded on the page. Enter the partner's name.

It is also possible to add the partner's website – if done, the image displayed for the partner will be hyperlinked with the website address provided in this field.

Ensure to click **Save page changes** once all details are entered.

Website Membership Page

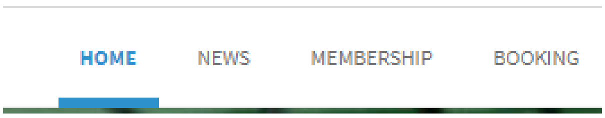
On the **Membership** page, clubs can add information about membership packages and any packages available online to public will be displayed on this page.

Navigation – making the page visible online

By default, the **Show in navigation** slider is turned grey (off).
This must be ticked (on-blue) to make this page visible on the website.

This enables the Club to complete the page in draft before it is visible. To hide a page (for example while making changes, or if the functionality is no longer available), turn this slider back to grey and save changes.

The **Navigation sort order** is used to re-order the main navigation menu on the website – the lowest number appears on the left of the screen on the website. By default, all pages are set to 0 until this number is entered.



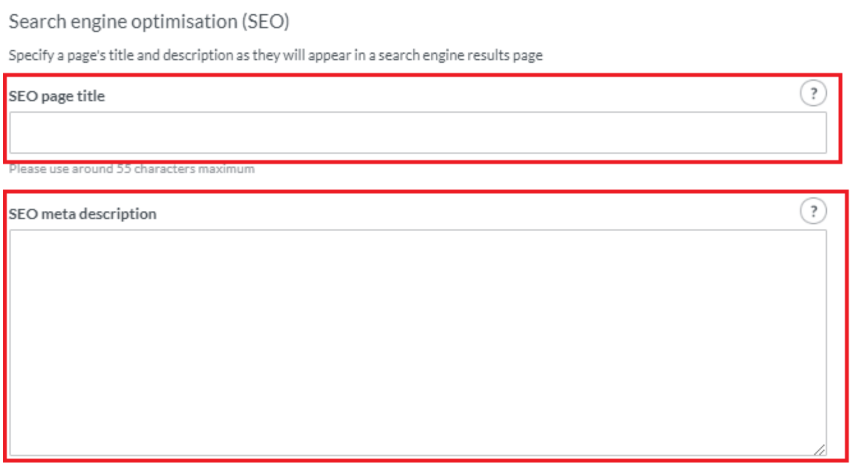
For example, setting News to 1, Membership to 2, and Booking to 3 would mean the website navigation bar would be displayed as Home, News, Membership and Booking.
A custom page could then be set as 4 and so on.

The **Navigation text** is the text to be displayed as the "tab" on each page of the website.

To assist with search results on search engine websites (e.g. Google), Clubs have the ability to optimise the search engine results for each individual page, by specifying the title and description as it would appear as a clickable headline in the web browser.

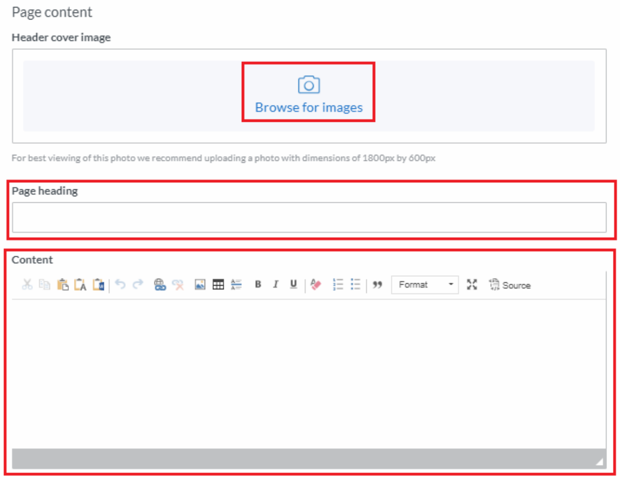
SEO page title: the title will be prefixed by the venue name (e.g. Venue / Membership).

SEO meta description: the description should be a concise summary of the web page content (50-300 characters).



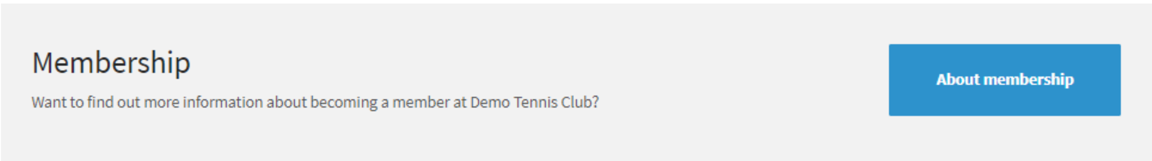
Page content

Add an image specific to the page if required, then enter the page heading and content that is to be displayed:

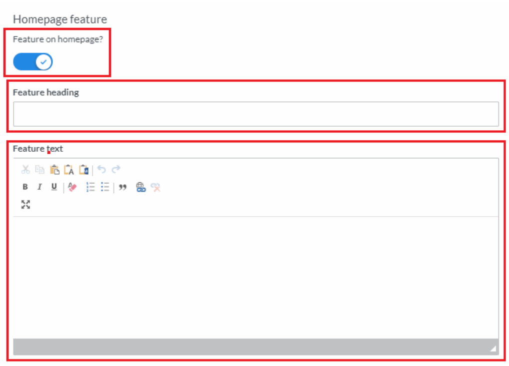


Homepage feature

To aid with online sales and providing membership information easily, Clubs have the ability to feature the membership widget on their homepage, see image below:



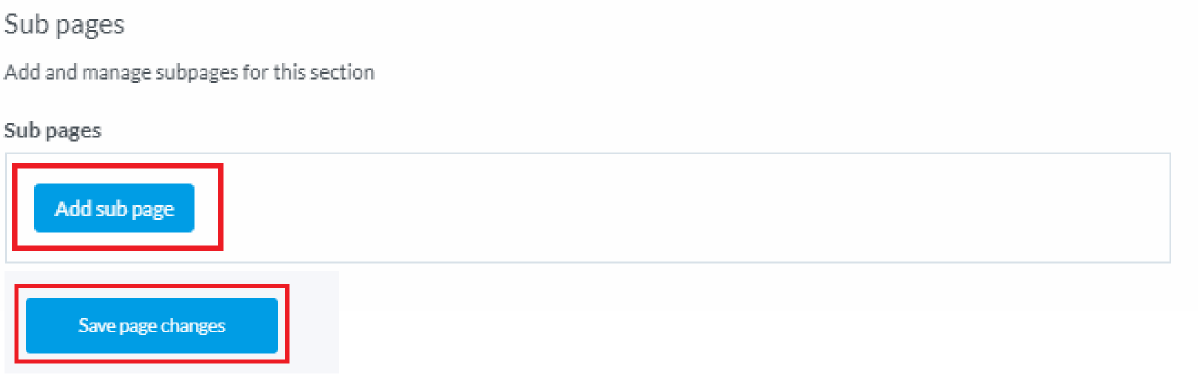
To add the membership widget, turn the **Feature on homepage** button to blue, then enter the heading and text that should appear on the widget on the homepage.



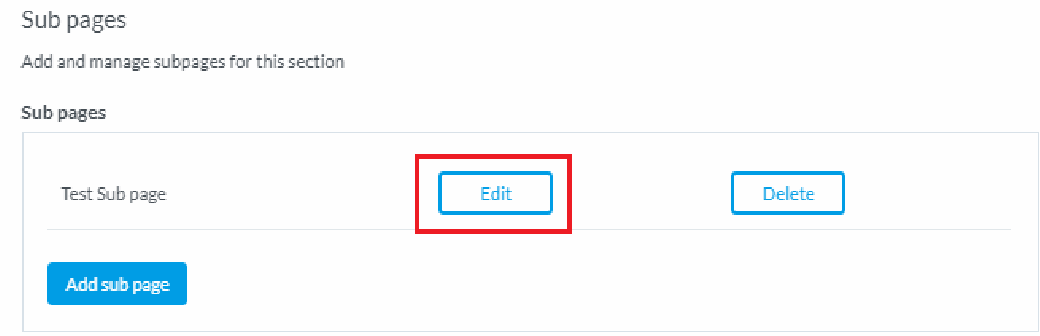
Adding Sub Pages to any webpage

Clubs have the ability to add up to seven sub pages to each web page. Click **Add sub page**, then click **Save page changes** at the bottom of the page.

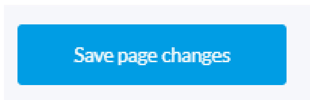
NOTE: this is required before the Club can begin to add content to the sub page



Once saved, the system will allow the sub page to be edited. Click **Edit** and add the relevant page content, remembering to click **Save page changes** at the bottom of the page when completed to apply changes.



Enter all the relevant details to set up the Membership page, including Navigation sort order & text, page content and images, then click **Save page changes** to apply the changes to the website. (**NOTE:** this page will not be 'live' unless the show in navigation slider is ticked (on – blue) as described above).



Website Booking Page

Clubs with Book a Court will be able to use the website booking page. If clubs do not use the Book a Court system and want to have a "Court Hire" page, we recommend using a Custom Page with the title **Court Hire.**

For existing Book a Court clubs, when the booking page is activated, the booking sheet will be shown on this page. If clubs are moving from a Book a Court venue landing page to the website, they should activate the booking page immediately so that players are able to make bookings from the website.

To do so ensure you turn the **Show in navigation** button to blue.

Enter the relevant page content including titles, images and text as described in the Membership page section above, and remember to click **Save page changes** at the bottom of the page to apply changes.

Website News Page

Within the News page, Clubs can publish articles which are of interest to their website visitors. Clubs can assign these articles to a category that can be used by website visitors to filter content.

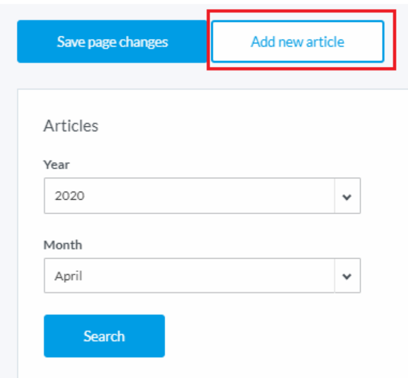
To add the News page to the website, ensure the **Show in navigation** slider is turned on (blue). Set the sort order, enter the Navigation text and search engine optimisation text as described in the Membership Page section above.

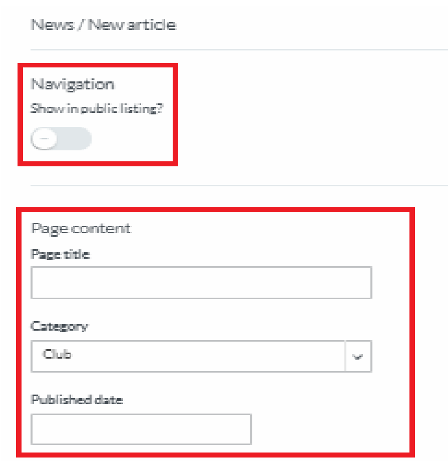
Feature: adding Club News snippets to the Home Page

To activate the news widget on the Club's Home page, turn the **Feature on homepage** slider to blue, then enter the page title that should appear on the widget on the homepage. Ensure to click **Save page changes** after updates.

Adding News Articles

To add a news article click **Add new article** button:



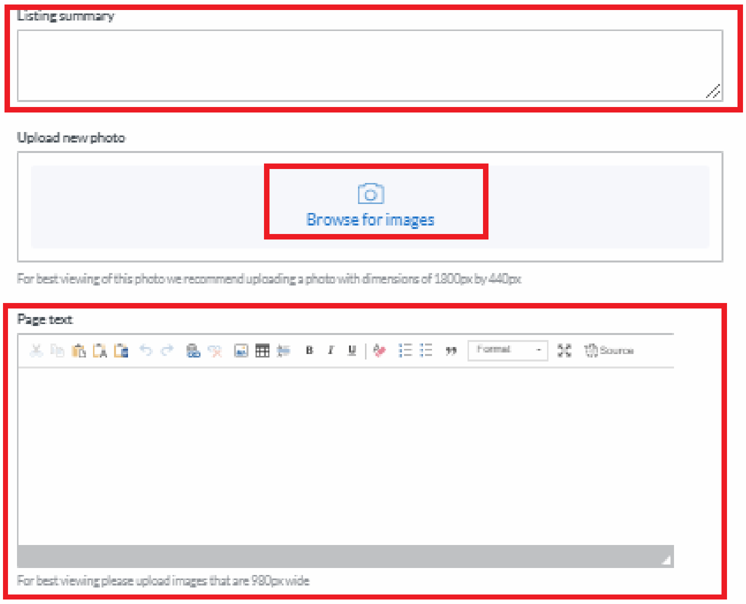


Clubs can decide if this article will be displayed in the public listing (e.g. can draft the article first for other administrators to review, or prepare in advance of an event ready for activation at the right time).

In addition to the title of the article and category for searching, Clubs also set the article published date and the category.

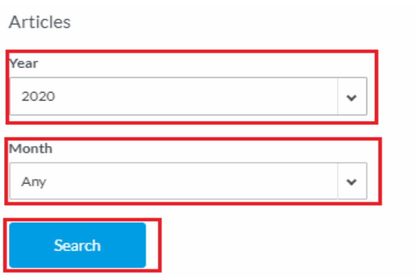
The article will not appear in the public listing until the published date is reached.

The article summary text is added (what appears on the Homepage widget and on the News front page), plus the option to add a photo, and the full text to appear in the article when it is opened:



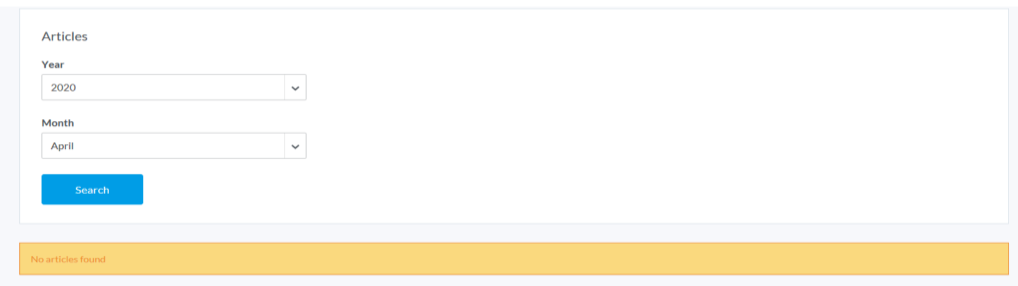
Once all information has been added, click Save page changes at the bottom of the page (remembering to set Show in public listing slider to on (blue) and with a valid published date to make the article appear online).

Searching for old / draft articles to edit or delete

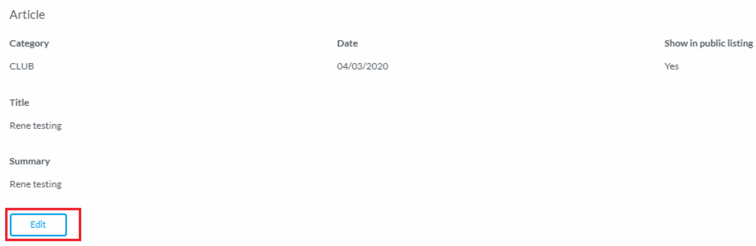


Within the News page, Clubs can use the drop down menus to search for articles to edit or delete – set the year and month for which it was applied

NOTE: if there are no articles existing **within the date range entered**, a bar will appear at the bottom of the screen stating 'No articles found'



Once the article is located, click **Edit** to make changes, or delete the article as applicable:

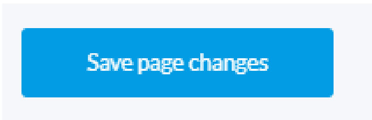


Creating custom pages for the website

ClubSpark Website Manager allows Clubs to create up to three custom pages. This enables the Club to have the flexibility of naming the page as they require, adding content, and adding up to seven sub-pages as required.

All fields are completed as per the Membership Page section above (with the exception of the Homepage feature which is a widget specific to the Membership module).

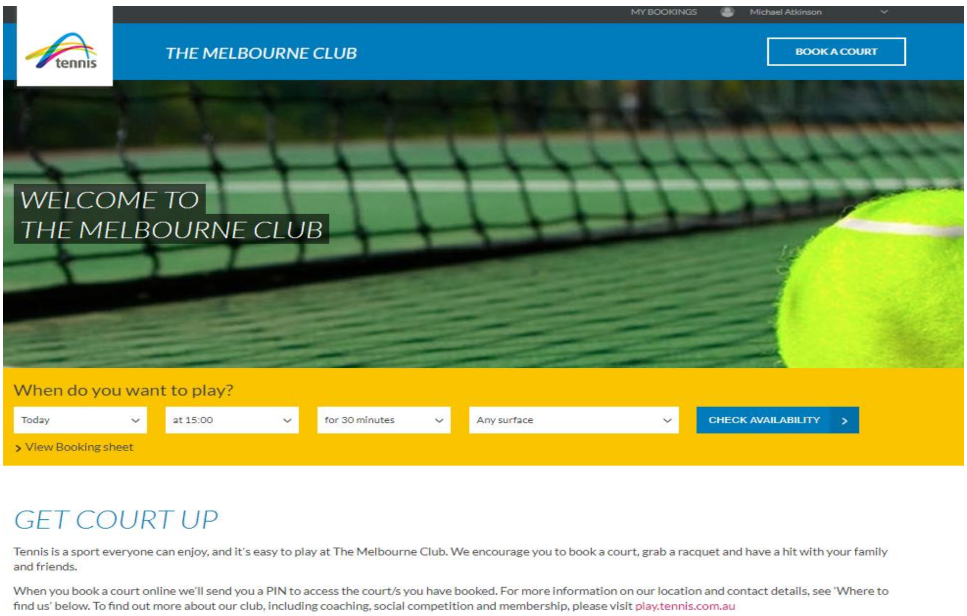
As with all pages, ensure Navigation settings are configured, add all applicable content, then **Save page changes** to apply changes to the website.



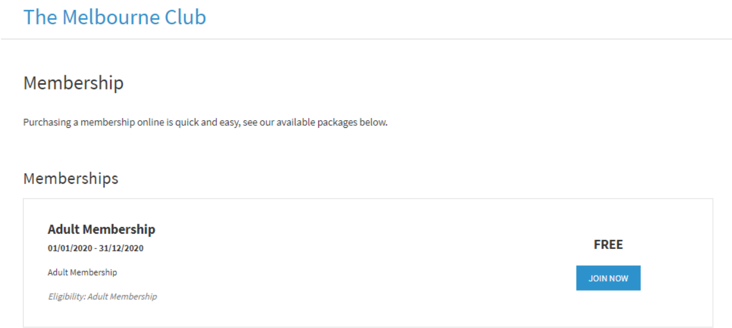
Unique web page links for venues not using ClubSpark Website module

For venues that have **their own website** and are not using the ClubSpark website module, there is provision to use the direct page link for making bookings, events, memberships, etc and then display the ClubSpark URL link on their own website and/or social media platforms.

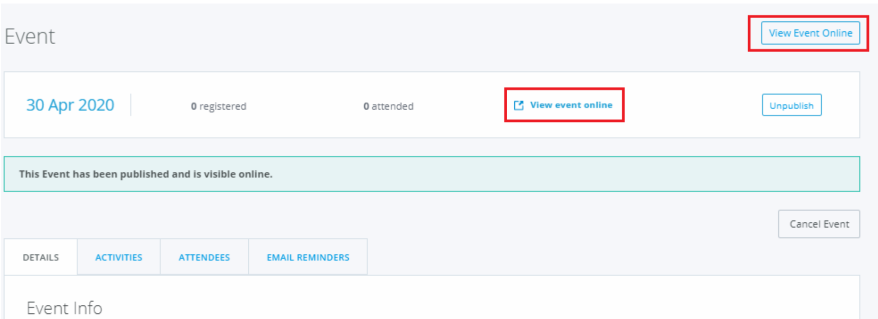
Venues **with the Booking module activated**, but no ClubSpark website, will have their own "venue landing page" (see image below) for players to make a booking online – this URL is generally: play.tennis.com.au/venuename



Venues **with the Membership module activated**, but no ClubSpark website will be able to copy the link of their unique Membership page (see image below) to be displayed and promote membership on their own website and/or social media platforms – the URL is generally: play.tennis.com.au/*venuename*/Membership/Join



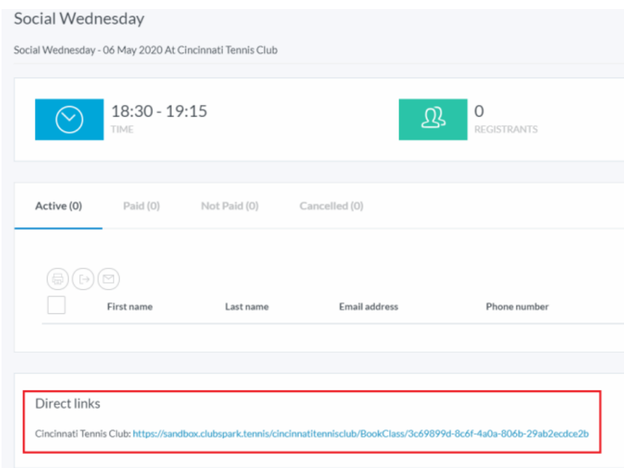
Venues **with the Events module activated**, but no ClubSpark website will be able to use the unique event page which is created once an event has been made, to promote the event on their own website and/or social media platforms. When viewing the event within the **Events** module, click on either of the **View event online** buttons (see below) to open the unique event page – use this URL to promote the event at the venue.



Venues **with the Programs module activated**, but no ClubSpark website will be able to use the direct links for each session to display and promote the session on their own website and/or social media platforms.

After clicking on the appropriate program within the **Programs** module, click on the active program to view the sessions. Each session will have its own unique link - for example, if a program is running for 10 sessions, then there will be 10 unique links available for participants to use to register online.

When clicking on a session, the unique link is displayed at the bottom of the page, as shown below:



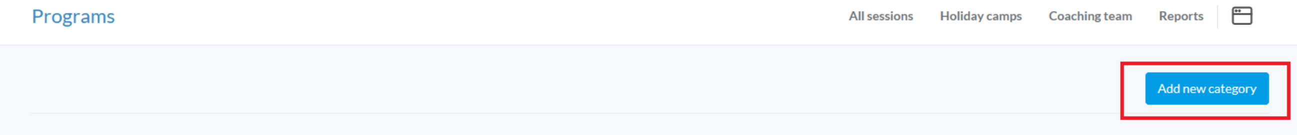
Programs Module

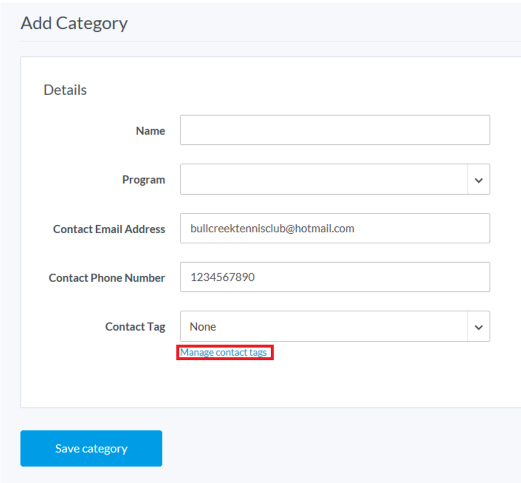
The Programs module allows Clubs to create custom programs and then add single or recurring sessions to the program.

Setting up program categories

Program categories help the Club to group programs of similar types together for viewing and reporting.

After clicking on the **Programs** module from the left hand side, click **Add new category** in the top right of the screen:





Give the category a name (e.g. 'Social Wednesday').

Select the program type (i.e. Adult or Junior).

Enter the contact details for that program category.

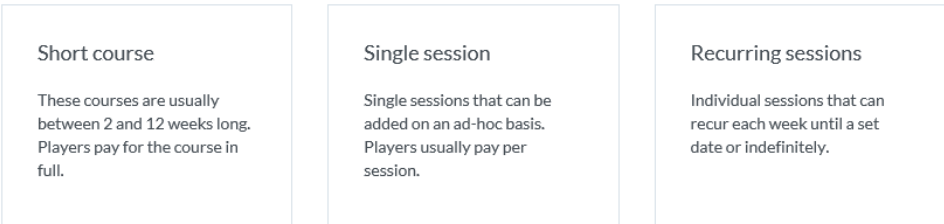
(Optional) add a contact tag.

Click **Save category.**

NOTE: If a contact tag is added, this tag will be assigned to each contact who attends one of these sessions. Custom tags can be created by clicking **Manage custom tags**.

Creating new programs

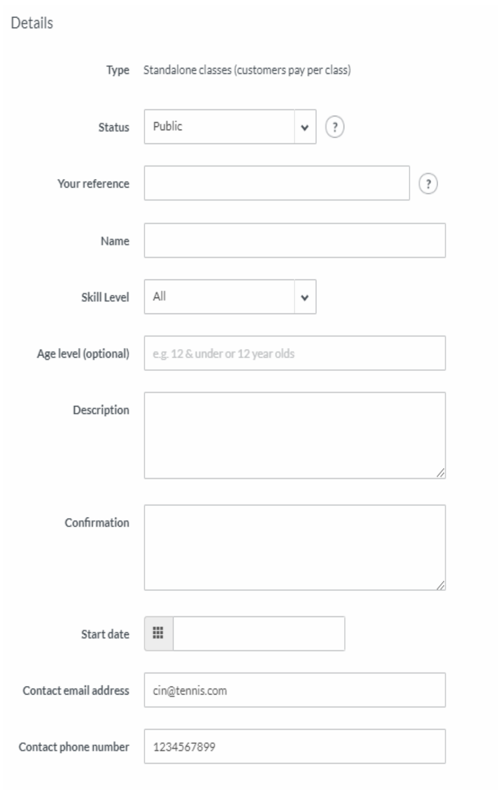
After clicking save, the new categories page opens, and the Club can begin adding new programs under this category. Click **Create a new program** – a prompt will appear to select a type of 'program'.
There are 3 types of programs:



In this user guide, we will provide an example for a single session (e.g. "Social Wednesday") and a recurring session (e.g. "Open Court Sessions).

Single sessions – Setting up a standalone session program (customers pay per session)

Single session program types are used for classes where customers pay per session e.g. ‘Social Wednesdays’.
After clicking ‘Single session’ as the type of program, the following Details screen is displayed:



Status - When selecting the status of the program, using the ‘Public’ status enables participants to start viewing and registering into the session, whereas ‘Hidden’ status doesn’t allow participants to view or register to sessions – this may be useful when extra time is required to complete the set up before making the program available online.

Your reference - for internal purposes and will not appear publicly

Name & Description – enter the name and description of the program. These will be visible to participants when making a booking.

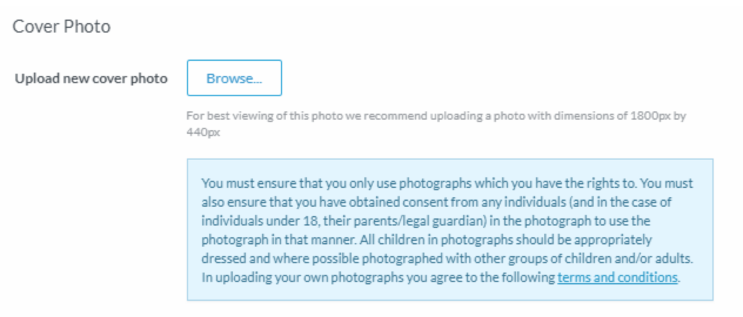
Age level (optional) - there is an option to enter participant age information, however this will display as information only, and will not stop participants outside of this age registering to the program

Confirmation – this text will be displayed once the participant has completed their registration.

Enter the **Start date** of the program

If required, update the specific **contact details** for this program – these will be used on confirmations and website

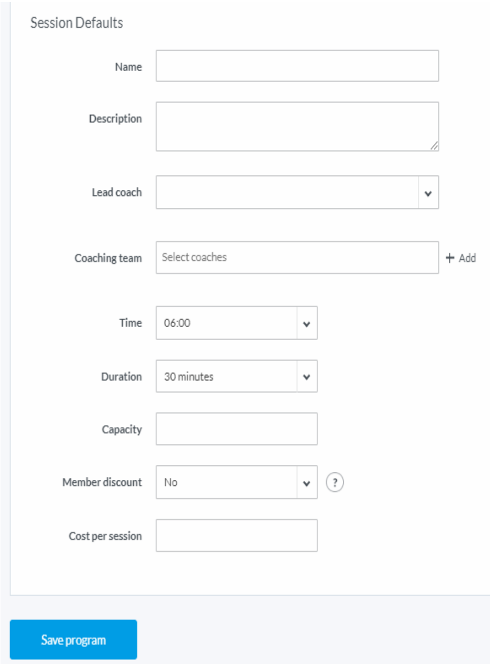
A cover photo can be added to personalise the program more. Click **Browse** to search for an image.



Keep to the recommended dimensions to ensure the image displays correctly

The next step after completing the program details is to enter the default details for each session of this program.

NOTE: any individual session can still be edited once the program has been saved.



Name & Description - enter the name and description of the session. Use the description section to outline the activities of the program.

Lead Coach & Coaching team – enter this program's coach details

Time & Duration - Enter the start time and the duration of the session

In the **Capacity** field, enter the total number of participants able to register per session.

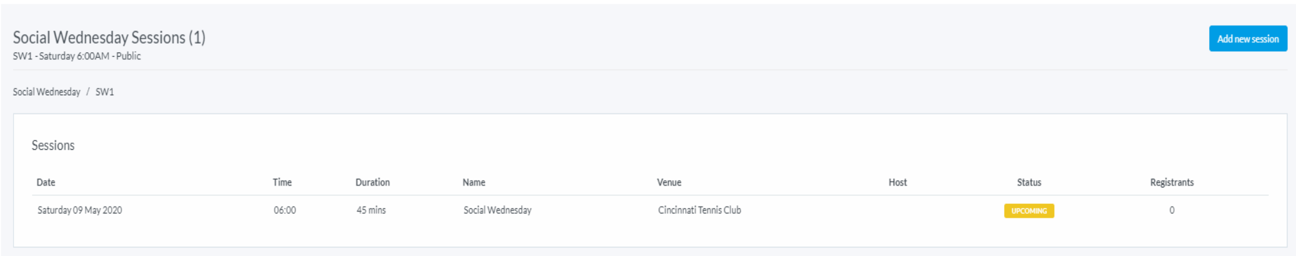
Member Discount – Determine if members are eligible to receive a discounted rate by selecting **No** or **Yes** in the drop down menu.

Enter the **Cost per session**. If **Yes** to member discount was selected, a cost per session for members must be entered.

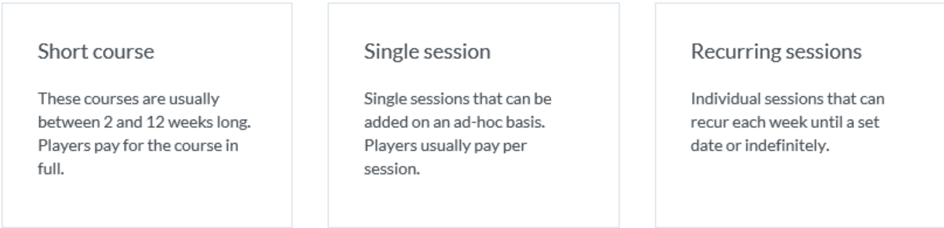
Once completed, click **Save program** and the individual sessions will be created, as shown below.

To add new sessions, simply click **Add new session**, located to the top right of the page. The system will automatically pre-fill the details with the default settings entered in the previous step.

To edit the session, click anywhere on the row of the session, then click **Edit session** in the top right.

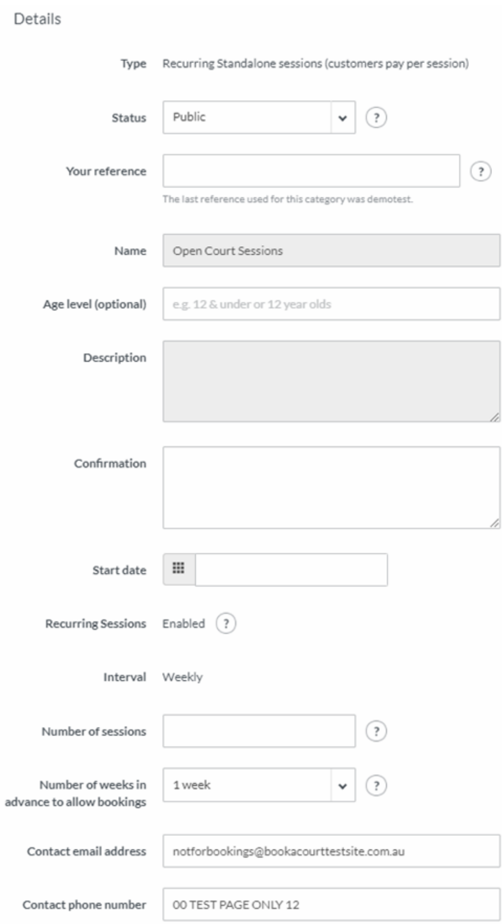


Recurring Standalone sessions - Setting up an Open Court Sessions program



After creating the new category, click 'Recurring session' as the type of program, and the following Details screen is displayed for the Program setup:

Program Details screen:



Prefilled fields – Name and Description
The name and description will be pre-defined for Open Court Sessions, therefore the fields are greyed out (cannot be edited).

Status - When selecting the status of the program, using the 'Public' status enables participants to start viewing and registering into the session, whereas 'Hidden' status doesn't allow participants to view or register to sessions – this may be useful when extra time is required to complete the set up before making the program available online.

Your reference - for internal purposes and will not appear publicly

Age level (optional) - there is an option to enter participant age information, however this will display as information only, and will not stop participants outside of this age registering to the program

Confirmation – this text will be displayed once the participant has completed their registration.

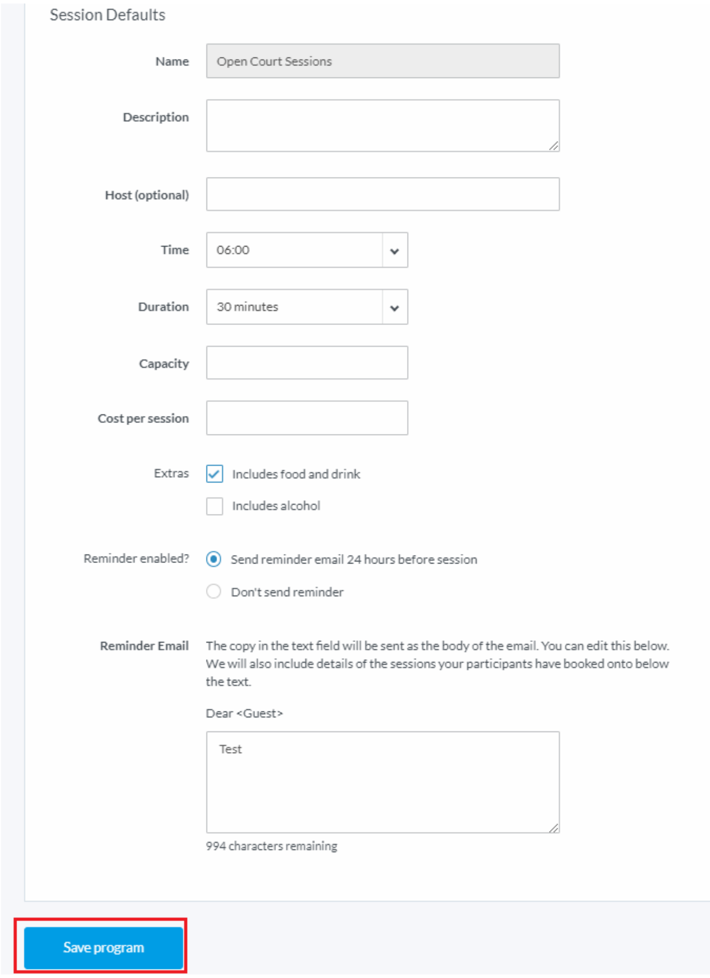
Enter the **Start date of** the first Open Court Sessions, then enter the **Number of sessions** that will be run in this program (you can add more sessions later, if required). Select the number of weeks participants can register in advance to the session.
NOTE: it is recommended to allow all sessions to be booked as far in advance as possible.

If required, update the specific **contact details** for this Open Court Sessions program – these will be used on confirmations and website

The next step after completing the program details is to enter the default details for each session of this program.

NOTE: any individual session can still be edited once the program has been saved.

Session Defaults screen:



Description - Enter a description for the session. Use this section to include information such as the type of food and drinks that will be available on the day, or other important information participants should know before they register.

Host - Enter the name of the host for the session, the start time and duration of the session.

In the **Capacity** field, enter the total number of participants able to register per session.
NOTE: it is recommended to set a capacity of 20 participants per two courts.

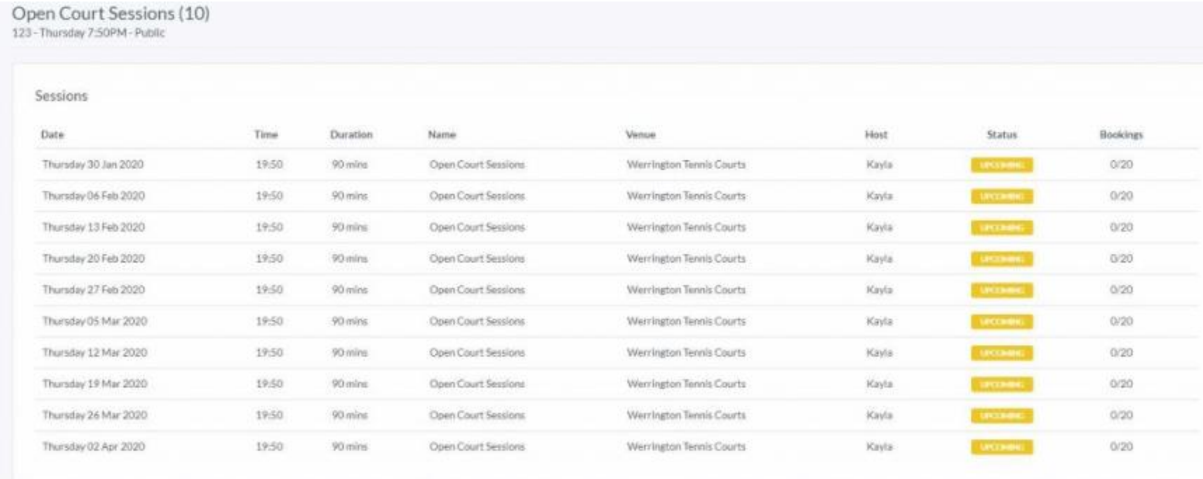
Enter the **cost** per session and then indicate **extras** - whether food, drink and alcohol will be a part of the session.

Clubs have the option to send a **reminder email** to participants 24 hours prior to a session into which they have registered.
The Club should include important information in the text box provided, such as the host name or a reminder about food that will be served.
Note: The core date/time information for the session will automatically be added to the email, so does not need to be repeated.

Once completed, click **Save program** and the individual sessions will be created.

Managing sessions within a program

Once the default session setup has been created and saved, the Sessions page is displayed:


Open Court Sessions (10)
123 - Thursday 7:50PM - Public

Sessions

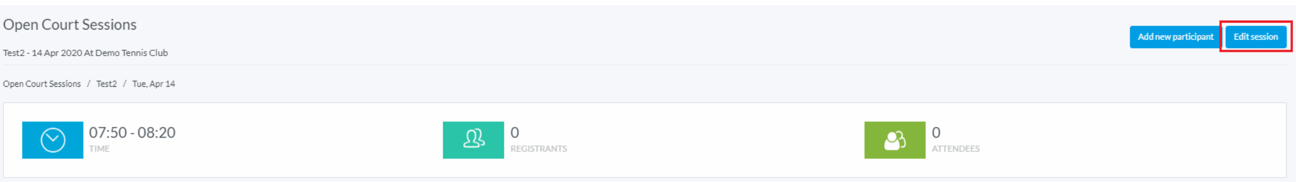
Date	Time	Duration	Name	Venue	Host	Status	Bookings
Thursday 30 Jan 2020	19:50	90 mins	Open Court Sessions	Werrington Tennis Courts	Kayla	[illegible]	0/20
Thursday 06 Feb 2020	19:50	90 mins	Open Court Sessions	Werrington Tennis Courts	Kayla	[illegible]	0/20
Thursday 13 Feb 2020	19:50	90 mins	Open Court Sessions	Werrington Tennis Courts	Kayla	[illegible]	0/20
Thursday 20 Feb 2020	19:50	90 mins	Open Court Sessions	Werrington Tennis Courts	Kayla	[illegible]	0/20
Thursday 27 Feb 2020	19:50	90 mins	Open Court Sessions	Werrington Tennis Courts	Kayla	[illegible]	0/20
Thursday 05 Mar 2020	19:50	90 mins	Open Court Sessions	Werrington Tennis Courts	Kayla	[illegible]	0/20
Thursday 12 Mar 2020	19:50	90 mins	Open Court Sessions	Werrington Tennis Courts	Kayla	[illegible]	0/20
Thursday 19 Mar 2020	19:50	90 mins	Open Court Sessions	Werrington Tennis Courts	Kayla	[illegible]	0/20
Thursday 26 Mar 2020	19:50	90 mins	Open Court Sessions	Werrington Tennis Courts	Kayla	[illegible]	0/20
Thursday 02 Apr 2020	19:50	90 mins	Open Court Sessions	Werrington Tennis Courts	Kayla	[illegible]	0/20

By clicking on any individual session, Clubs can:

- Edit details such as description, times or dates of individual sessions
- Cancel a session without removing the entire program
- View registered participants
- Generate reports on participants
- Refund participants

Editing or cancelling a session

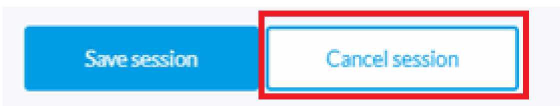
To edit a session, select the session you wish to edit, then click **Edit session** in the top right.

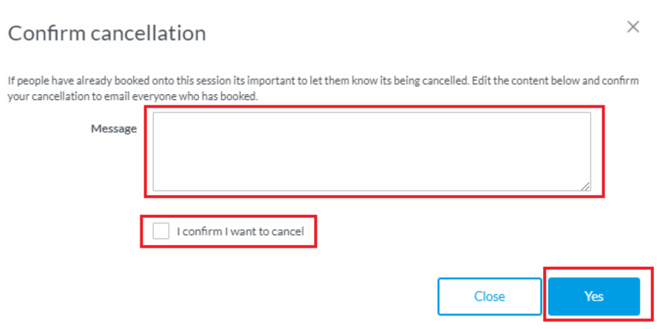


The individual session screen contains the same information as the default session details screen - update the relevant details that need to be edited, then remember to click **Save session** to apply changes.

NOTE: To cancel or delete a session, select the session as above and click **Edit session** in the top right. If no one has registered for the session, you can click **Delete session** to cancel.

BUT: if participants **have already registered** for the session, the option will have changed in the Edit Session screen - click **Cancel session:**





The Club will be asked to enter a cancellation message which is then sent to cancelled participants via email.

For example, this may be used if adverse weather conditions causes a session to be cancelled.

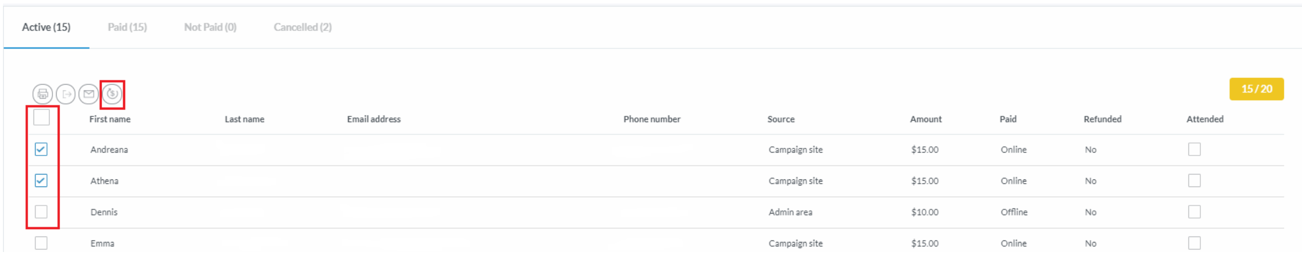
Check the box to confirm the cancellation - click **Yes**.

NOTE: it is recommended that participants receive a refund for cancelled sessions.

Refunding participants

To refund one or multiple participants from a session within a program, from the **Programs** module, click on the **Open Court Sessions** program type, and click on the current program to open the **Sessions** page.

Click on the session for which participants require a refund to open it. Use the tick boxes to select the participant(s) to be refunded, then click the dollar sign ($) icon, as shown below:



A pop up will appear asking the Club to confirm and proceed with the refund - click **Submit** to issue the refund.

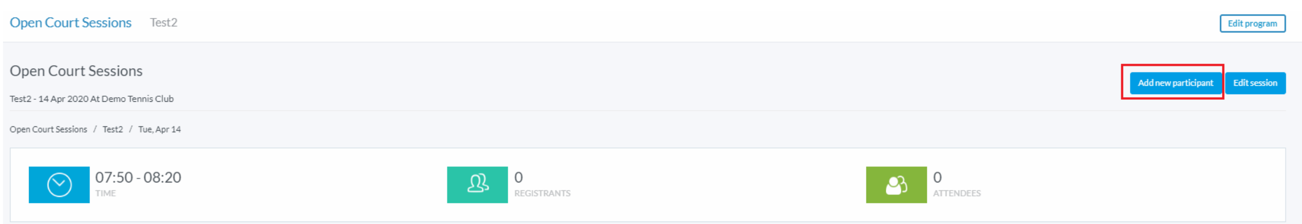
NOTE: Participants will be able to withdraw from Open Court Sessions at any stage, however they will only receive an **automatic** refund if they cancel more than 48 hours in advance.

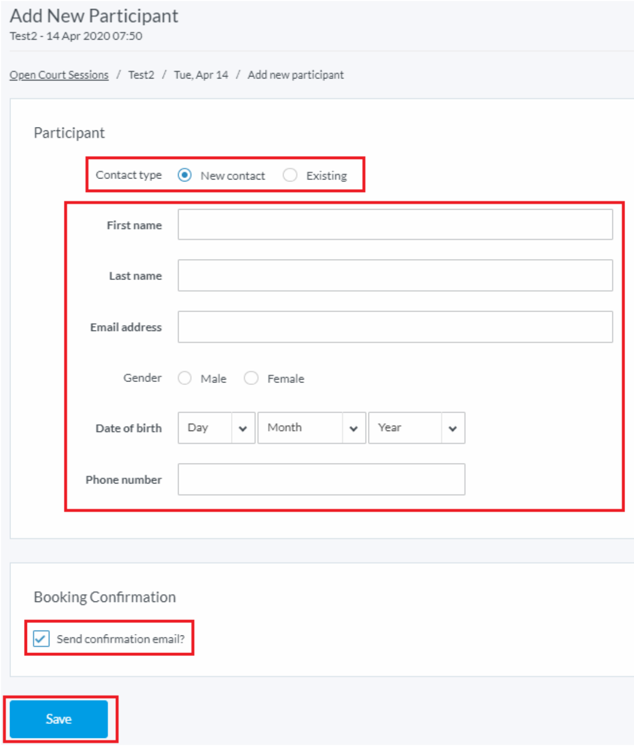
Adding new participants

Clubs have the ability to manually add participants to sessions in the software, without the participant needing to go through the online registration.

For example, this may be used for offline registrations made in programs that commenced prior to ClubSpark being used by a new club, or to assist a participant by completing the online registration process for/with them.

From the **Programs** module, click on the **Open Court Sessions** program type, and click on the current program to open the **Sessions** page. From the Sessions page, click **Add new participant:**





If the participant is already in ClubSpark, the contact type should be set to Existing.

If the participant does not appear in the **Contacts** module, then ensure the Contact type is set to **New contact**.

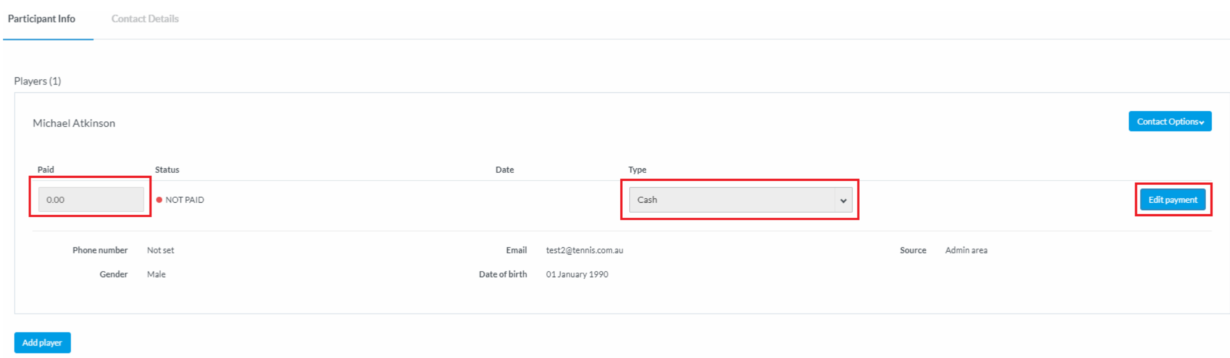
Enter the participant's details, decide whether a confirmation email should be sent to the participant by ticking the box, then click **Save.**

NOTE: The Club most only enter the information **known** rather than adding dummy data - these fields are not compulsory.

Select whether to send a confirmation email (not required if bringing the system up to date with existing bookings).

Click **Save.**

Once the participant booking has been saved, it is possible to enter payment details for the participant by clicking **Edit payment.** Enter the amount and the payment method, then click **Save.**

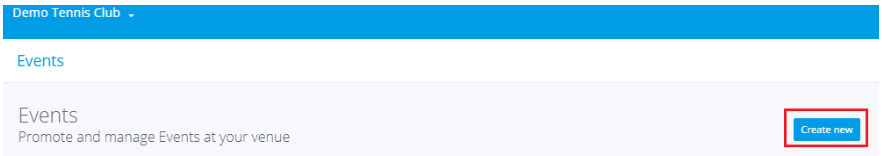


Events Module

This is a booking feature that can be used by Clubs to create, manage and promote one-off events at their venue. The Club can set up participation, activity, and payment functionality.

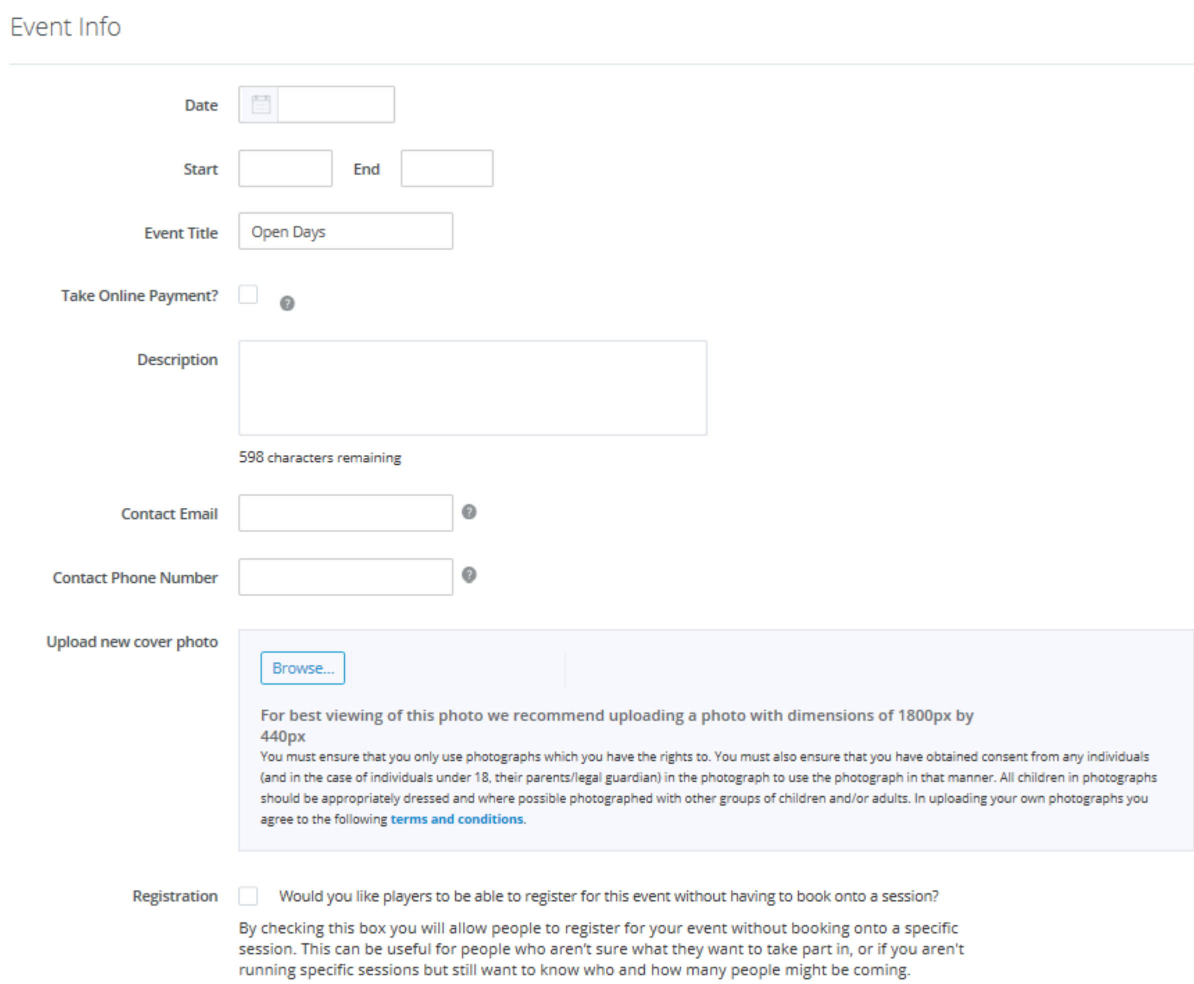
Examples might include events where individual courts do not need to be booked, such as Trivia nights, Christmas BBQs, organising the AGM, free tennis days, and more.

In the **Admin area**, click on the **Events** module from the left hand menu and then click **Create new:**



Enter all the base event details including date, start & end time, whether online payment is required (**NOTE:** Stripe must be configured if activated), event description, contact details for the event host, and a cover photo.

NOTE: cross-check all details are correct and up to date, as all information including the cover photo will be displayed publicly on the Events web page.



The final step is to determine whether players are able to register to the event without having to book into an individual session of the event (e.g. if Hot Shots or Coaching will be set up as activities within the event – see the next section for further information).

This can be useful for potential participants who are unsure what to take part in, or when the Club isn't running specific activities / sessions but still want to know who and how many people might be attending the event overall.

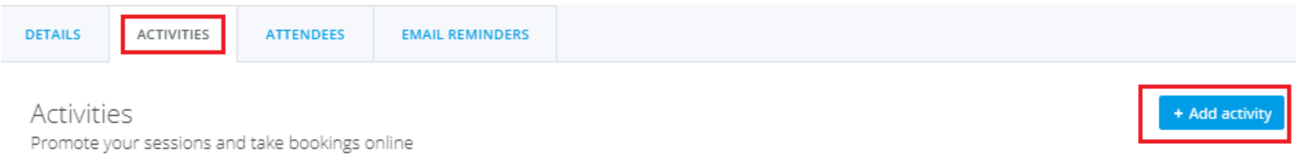
Once all details have been entered, click **Save Event** at the bottom of the page.

OR, if Registration has been ticked ON to enable registering without booking onto a session, can click **Save & Publish Event** without setting up activities and sessions first (see next section).

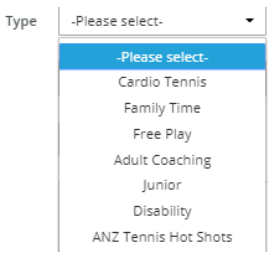
Add activities and sessions to an event

Once an event has been created, Clubs can add activities (e.g. Free play, Adult Coaching, etc) to the event. Clubs can add as many activities to the event as required – there is no system limit.

After the event has been created, click on the event and click on the **Activities** tab. Click **+Add activity** to begin adding activities to the event:

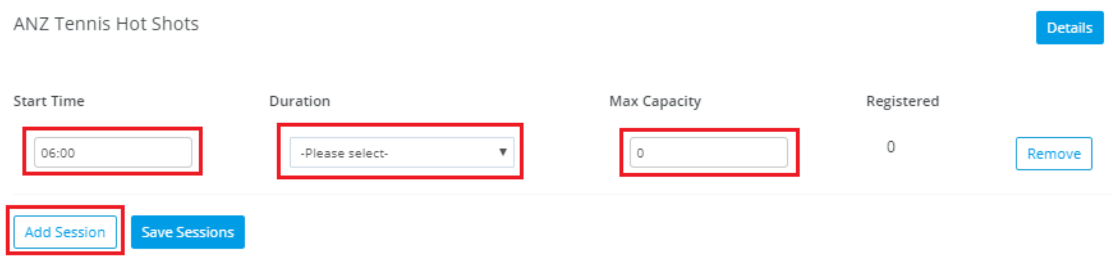


Select the 'Type' of activity to add by using the drop down menu. **NOTE:** These activities have been pre-defined



The 'Description' and 'Activity photo' defaults will automatically populate based on the activity type entered – update as required, and add/update the Entry fee Per Player for at activity. Once complete, click **Save activity.**

Once the activity has been saved, individual sessions can be then be added by clicking **Add Session:**

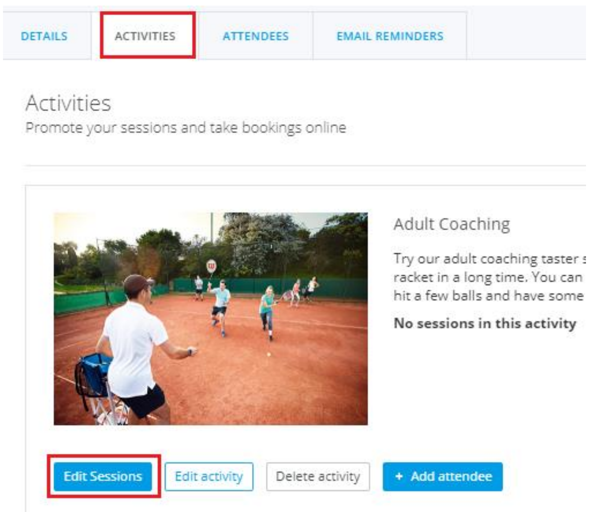


Enter the session start time, duration and a max capacity for the session. Remember to click **Save Sessions** once the session details have been entered. Multiple sessions can be added per activity by simply clicking **Add Session** again.

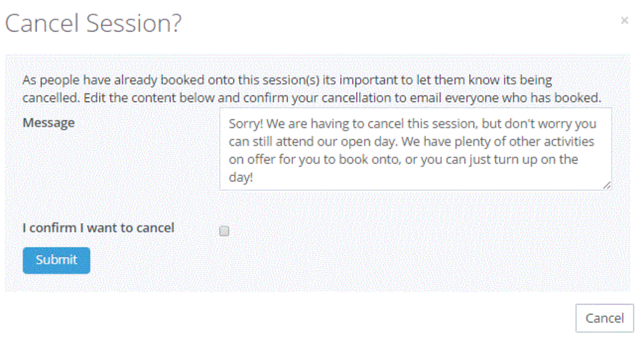
Deleting and editing sessions or activities from an event

Deleting sessions

In order to remove or delete a session from an event, locate it within the **Events** module screen. Click on the Event to open it, select the **Activities** tab and then click the **Edit Sessions** button:



Locate the session row to be removed and click the **Remove** button at the end of that row. Once completed, click **Save Sessions** and confirm the cancellation.

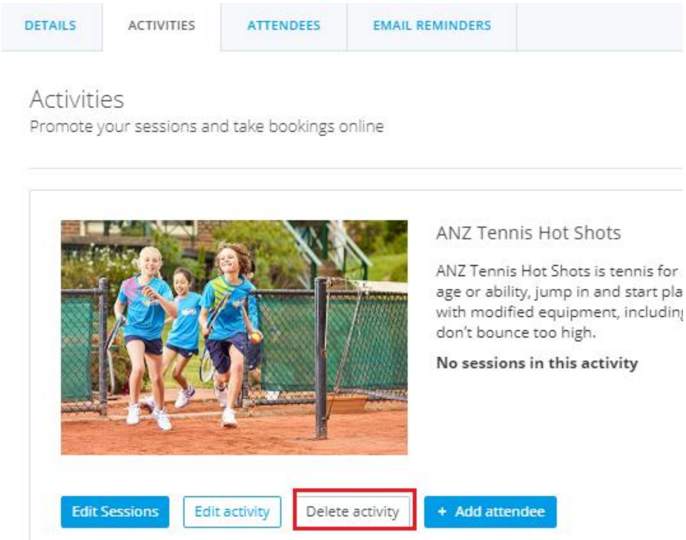


NOTE: If the session has **registered participants**, the Club will be given the option to email these participants notifying them that the session has been cancelled.

Deleting an activity

NOTE: To delete an activity, the Club must first remove all sessions from the activity – see above

Once all sessions associated with the activity have been removed, a **Delete activity** button will then be displayed / available under the activity in the **Activities** screen. Click **Delete activity**, and confirm when prompted.



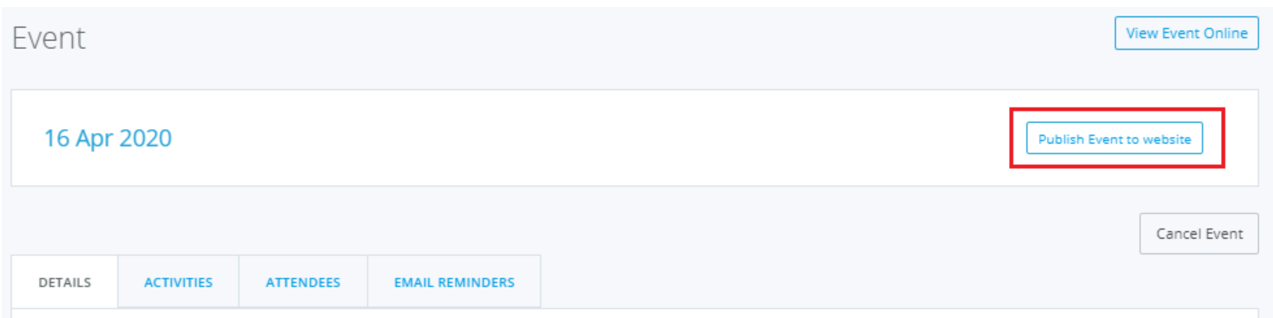
Editing an activity

It is also possible from the **Activities** screen to edit the activity – after selecting the relevant activity, click the **Edit activity** button. Make the necessary changes and click **Save.**

Publishing the Event online

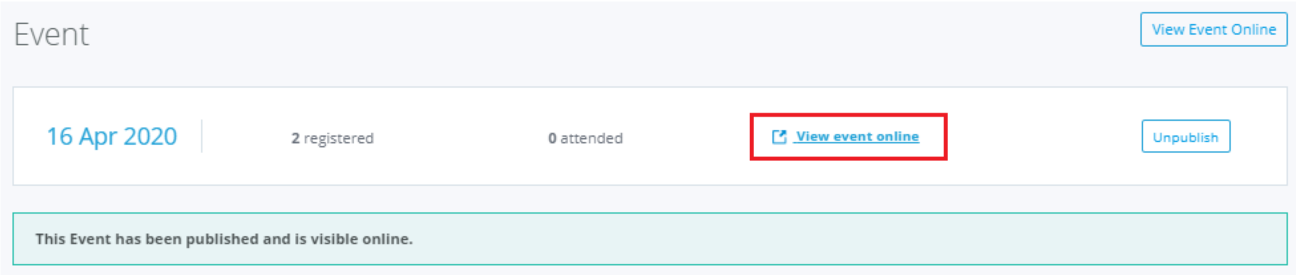
Once the event has been created, it needs to be published online to enable participants to register onto the event or individual activities / sessions based on the event configuration

From the **Events** module screen, select the particular event, then click the **Publish Event to website** button:



Once the event is set to **published**, an individual event page will be created, plus the event will appear on the Club's own venue website. This will display all activities and sessions that have been created and are available for online registration.

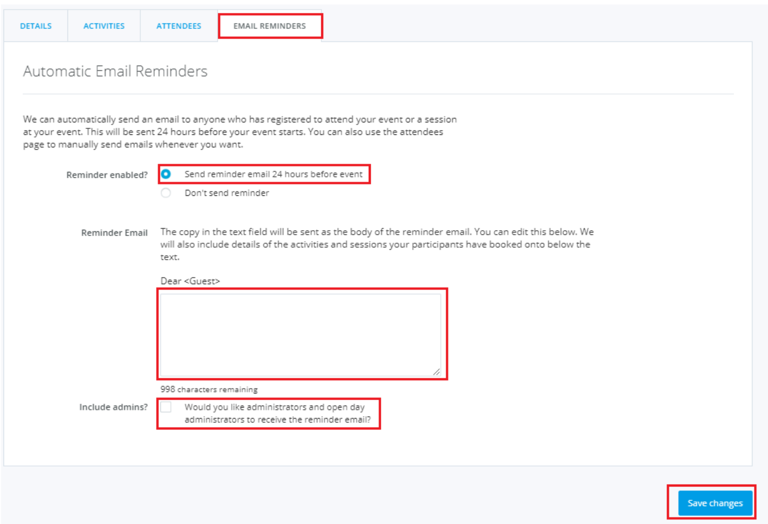
From the **Events** module, click to open the individual event and click the **View event online** button to display the Event page:



Automatic email reminders to registered participants

Automatic email reminders can be set to be sent 24 hours before the event starts to participants who have registered to attend the event or an individual session.

From the **Events** module, select the particular event, and click the **Email Reminders** tab:

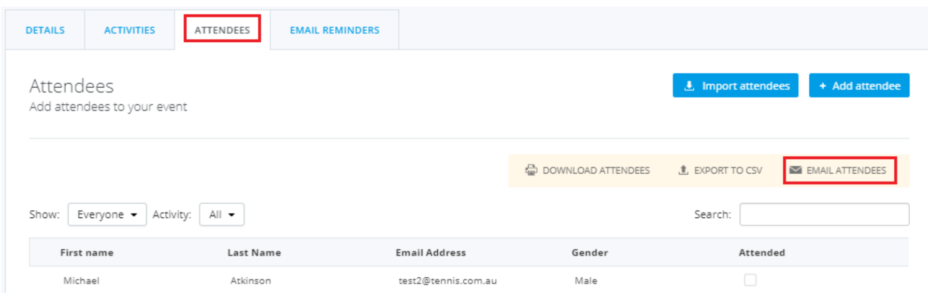


Select **Send reminder email 24 hours before event** button and enter the email content.

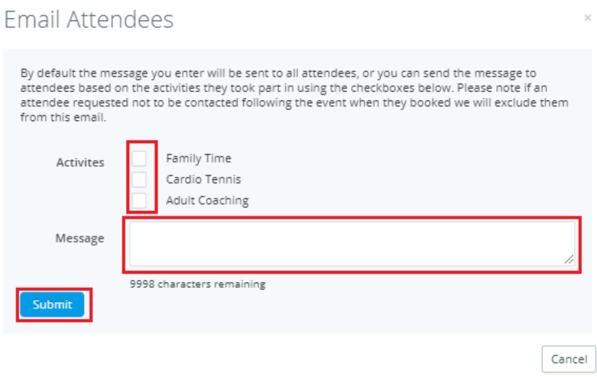
Determine if administrators should be added to in the email reminder list.

Once all necessary details have been entered, click **Save changes.**

Clubs can also manually send emails to attendees via the **Attendees** tab - click **Email Attendees** as shown below:



An overlay will appear to enter the email message:



By default the email will be sent to all attendees, however Clubs can send the message to attendees based on the activities they took part in using the check boxes.

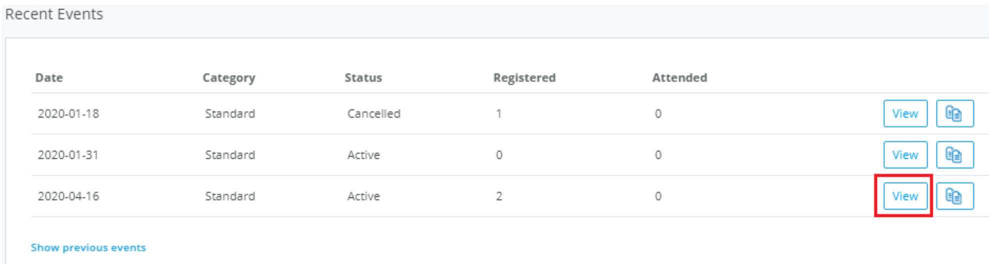
Click **Submit** once the email is ready to be sent to attendees.

NOTE: If an attendee had requested not to be contacted following the event when they registered online, they will be excluded from this email.

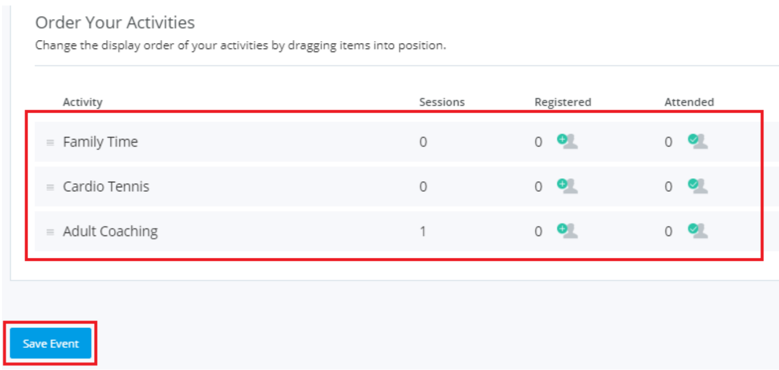
Change the order of activities on the Event page

Clubs have the ability to change the order of the activities for the event on the Event website page.

From the **Events** module, select the relevant event and click **View:**



Under the **Details** tab at the bottom of the page there will be a list of activities for the event:

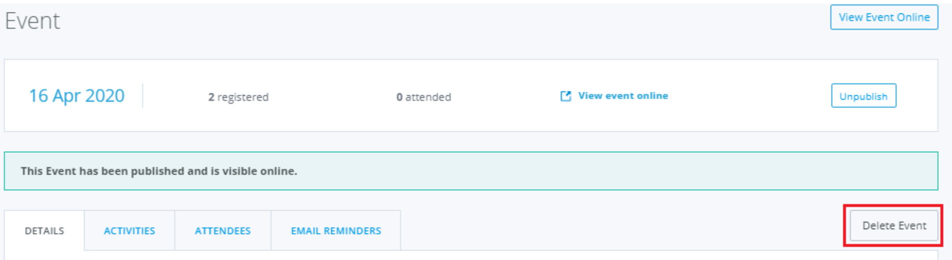


To change the order of activities displayed on the event page, simply click and drag the activities into the preferred position, then click **Save Event** once the activities are in the preferred order.

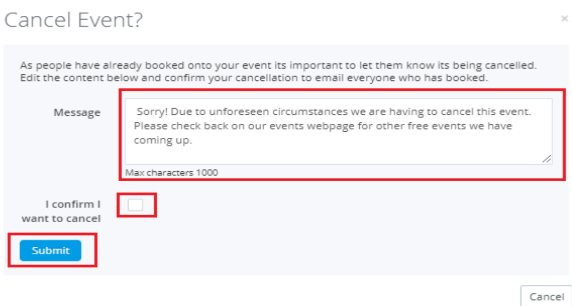
Deleting or cancelling an event

In order to delete an event, the Club must ensure there are no activities associated with that event that have participant bookings. Otherwise only participants registered to the event without registering to activities / sessions will be cancelled. See earlier sections for instructions for deleting activities or sessions from an event.

If necessary, remove all activities and sessions from the event first (see previous sections), then under the **Details** tab of the Event, click **Delete Event:**



NOTE: If there are participants booked onto the event, an overlay will appear allowing Clubs to send an email to all registered participants informing them that the event has been cancelled.

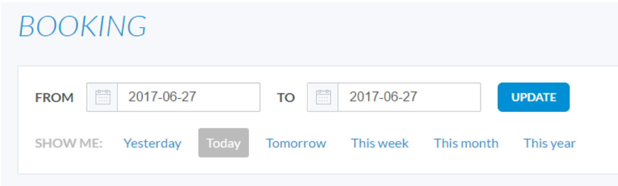


Once a message has been entered, confirm the cancellation by checking the box and then clicking **Submit.**

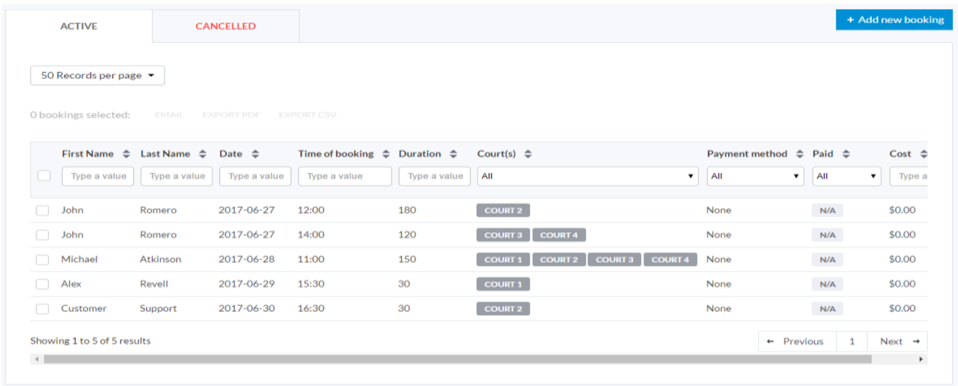
Booking Module

The booking module allows clubs to manage court hire at their venue, receive insightful data on court usage and revenue, all while saving club-volunteer time by making courts available to book online.

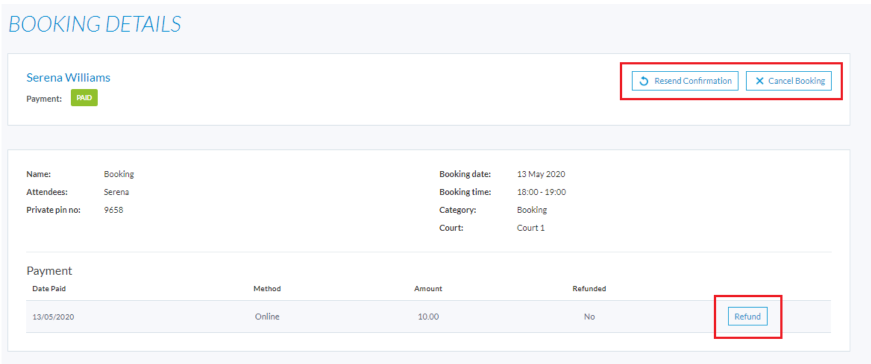
To manage bookings at the venue, select Booking from the left hand side menu.
Enter a date range and click 'update' or use the quick filters to display bookings for that specific period.



Your bookings will then display as shown below. Select the 'active' tab to display active bookings or the 'cancelled' tab to display cancelled bookings for that period. You can also filter your search by entering a value or text in the filter boxes.



By clicking on a booking, it will bring up the booking details, from here, you can resend the booking confirmation email, cancel the booking and refund a booking.

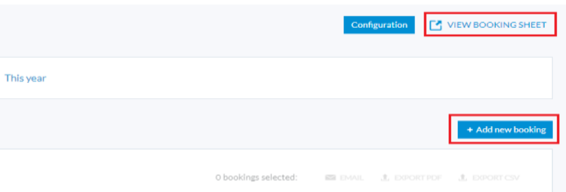


Within this **Booking** module, clubs are able to perform the following tasks;

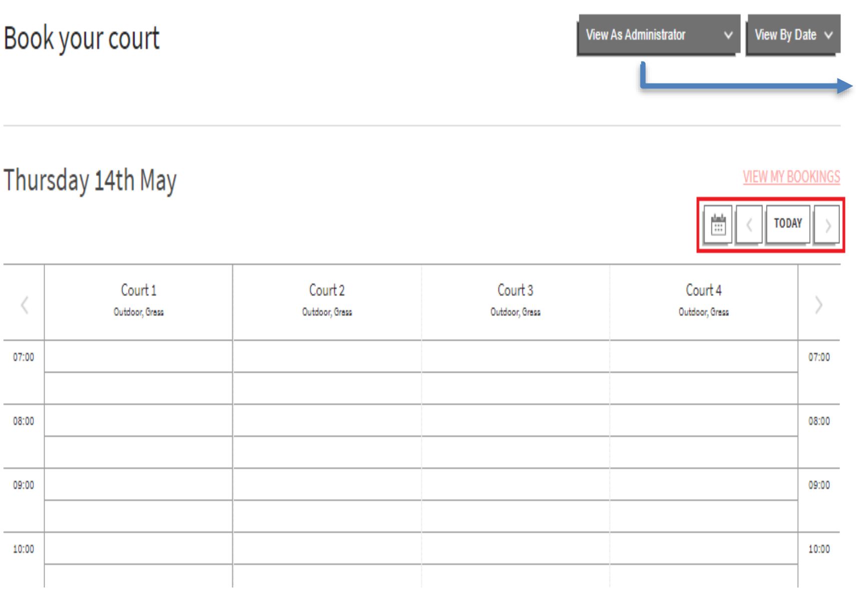
- View the booking sheet to add a new booking
- Export booking data
- Email booking contacts
- Resend booking confirmation emails
- Cancel bookings
- Refund bookings
- Access the 'Configuration' settings

View the booking sheet to add a new booking

To access the booking sheet to make a booking, click either **View booking sheet** or **+Add new booking** located in the top right hand corner, as shown in the image below.



The booking sheet will display the current day. Use the calendar icon or arrows to display a specific date.

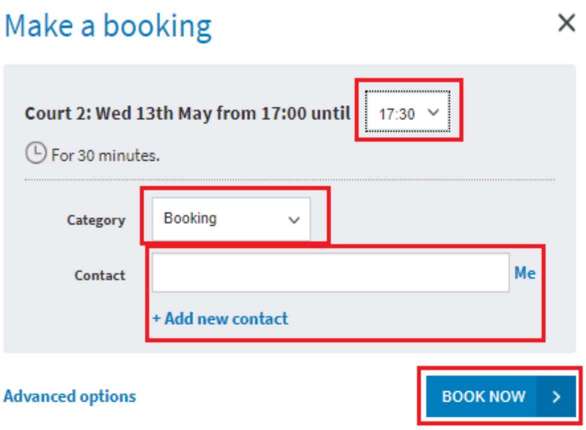


If the contact has a venue responsibility or admin role assigned to their account, they will be able to use this drop down to view the booking sheet with that user level.

For contacts with an active membership, this will display as 'view as member'.

The appropriate booking rules and pricing will be applied when viewing the booking sheet under the specific role.
For example, when 'viewing as Administrator', you can bypass the requirement to pay online for a booking.

To begin the process of making a booking online, select a booking slot and the following overlay will appear.



Use the drop down menu to extend the booking duration and the drop down menu to select the category.

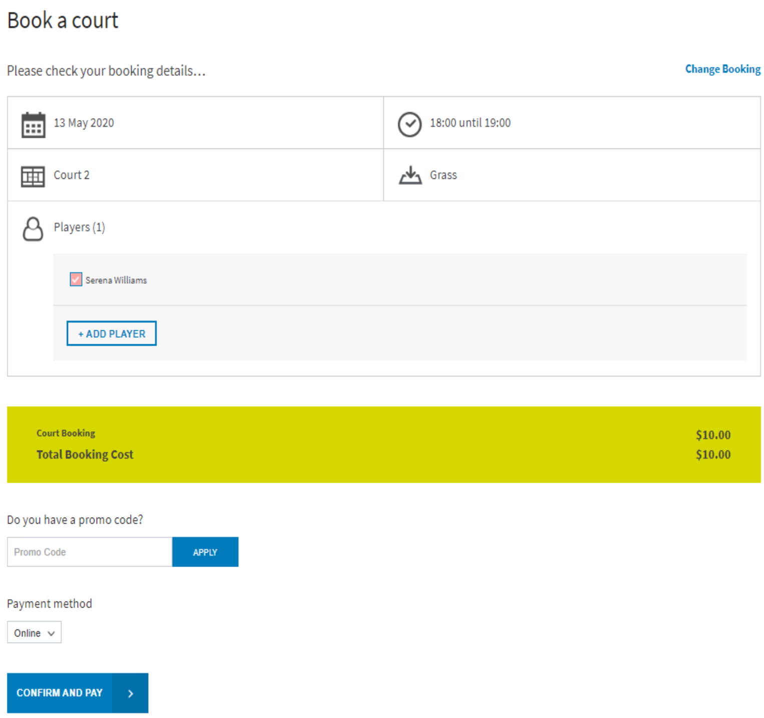
NOTE: If the venue has the Book a Court hardware installed, the selected category will determine how the gate behaves when the booking pin is entered.
For example, when a booking pin is successfully entered for a booking made under the 'Coaching', 'Competition' or 'Event' category, the gate will remain unlocked for the full duration of the booking.
For all other categories, when the booking pin is entered, the gate will unlock and then re-lock after 5 seconds of pin entry.

Determine the contact for the booking, by either:

1. Entering a name in the text field and searching for an existing contact in the contacts list (system will begin to match the text that is entered)
2. clicking **Me** – if the booking is for yourself, or
3. click **+Add new contact** if the contact does not already exist in the contacts list and enter their details

Then click **Book Now**.

The next page will ask to check your booking details, confirm these are correct, add any additional players, then click **Confirm and pay.**



Click **+Add Player** to add additional players to the booking – enter their name and determine if they're a member or guest.

NOTE: Adding players are not a requirement.

If a promo code is available, this is where players can apply the discount.

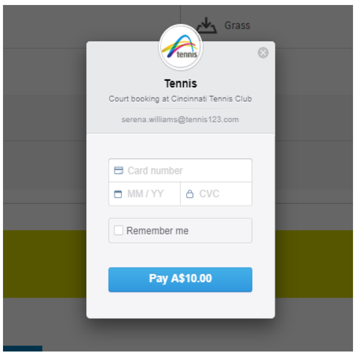
NOTE: Promo codes are case sensitive

Only administrators will be able to change the payment method to an offline payment, by using the drop down menu.

For members and non-members, if there is a dollar value in the 'Total Booking Cost', they will be required to pay online.

Once the booking details have been checked and are correct, click **Confirm and Pay**.

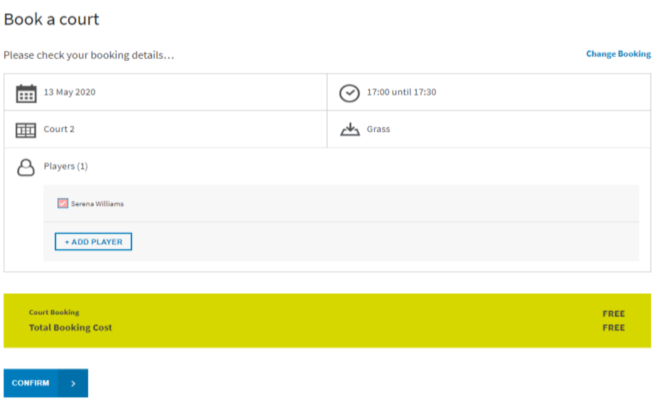
This will bring up the following overlay to enter credit card details to make payment for the booking.



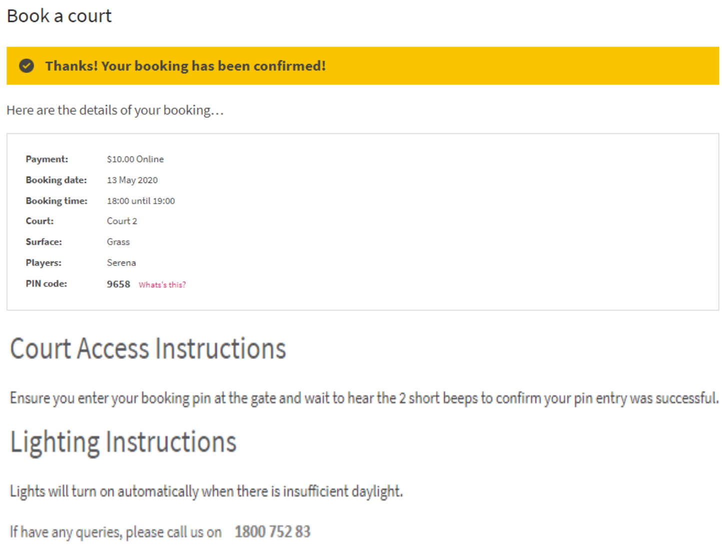
Online payments are powered by Stripe.

Clubs will need to have connected their bank account with Stripe in order to receive payments for bookings.

If the Total Booking Cost is showing as 'FREE', then the booking will just need to be confirmed, by clicking **Confirm**, as shown below.



Once the payment has been processed successfully and the booking has been confirmed, the page will refresh with confirmation of the booking being made and will display the booking details, as shown below.



In addition to this confirmation page, the contact of the booking will receive a confirmation email and SMS (if they have a valid mobile number in their profile).

Further instructions on how to access the court and/or lighting will also be displayed on this page.

NOTE: These instructions are especially important for venues without the Book a Court hardware installed.

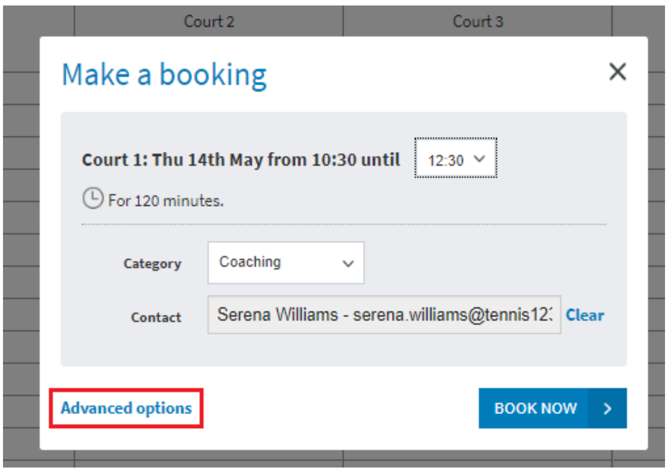
Adding recurring or multi-court bookings

Adding recurring bookings or multi-court bookings are only available to administrators of the **Booking** module (i.e. 'Super admins', 'Admins', 'Booking admins' & 'Booking sheet admins').

It is important that venues include all their recurring bookings (i.e. coaching lessons & competitions) into the software to ensure these courts are blocked out from casual play by members and non-members during these times.

To add a recurring or multi-court booking, head to the booking sheet and ensure you're 'viewing as Administrator'

Then select the desired booking slot and the following overlay will appear:



Select the end time of the booking by using the drop down menu.

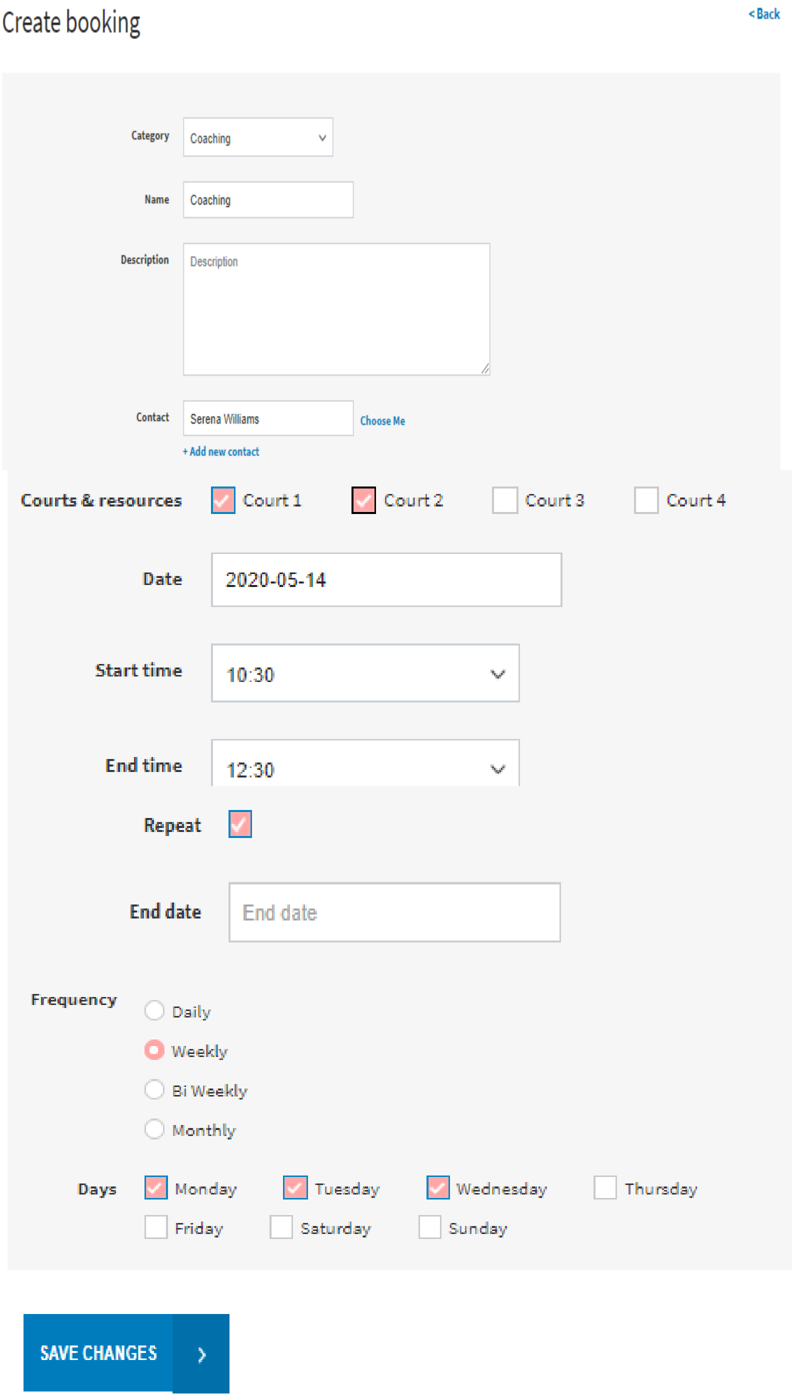
Set the category of the booking using the drop down menu.

Select the contact of the booking – in this example, we've selected our 'Coach'.

Click **Advanced options**.

NOTE: Making a booking via the 'Advanced options' will bypass the payment method.

The next page is where you will enter the relevant booking details.



Confirm the booking category, enter a booking name and description (optional) and confirm the booking contact.

If the category you have selected is ‘Booking’, the name in the ‘Contact’ field will appear on the booking sheet. For all other categories, the text that is entered in the ‘Name’ field will appear.

To add additional courts to the booking, tick the boxes adjacent to the court number.

Set the start date and confirm the start time and end time.

Tick the **Repeat** box to make this a recurring booking.

Enter an end date (optional) for the recurring booking, by clicking on the box it will bring up a calendar to select a date.

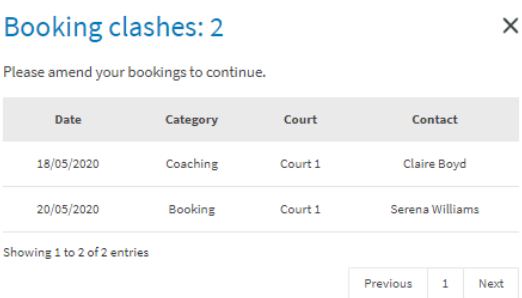
NOTE: If no end date is selected, the booking will continue to reoccur until the booking is cancelled

Determine the frequency of its reoccurrence by using the radio buttons.

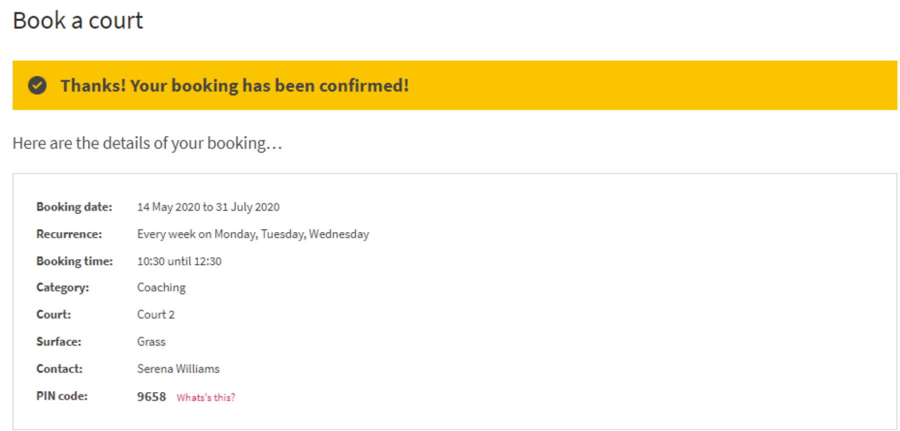
If you select ‘Weekly’ or ‘Bi Weekly’, you’ll then need to select the days of which this booking will occur by ticking the box adjacent to the name of the days.

Once all details have been entered, click **Save changes** to make the recurring and multi-court booking.

NOTE: If there are any clashes of bookings, the system will display the following overlay, to which you’ll need to make amendments to your bookings.



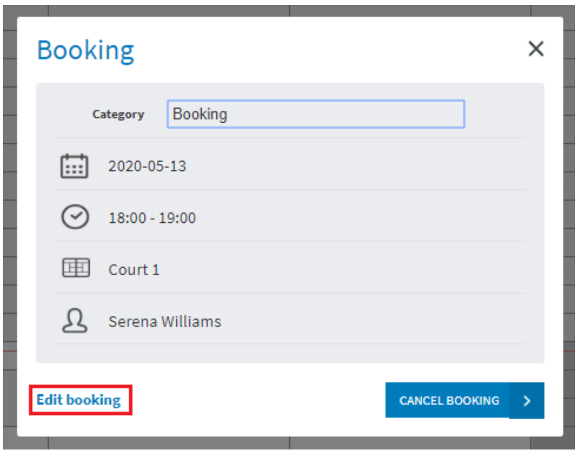
If no clashes are found, the page will refresh with confirmation of your booking being made, as shown below.



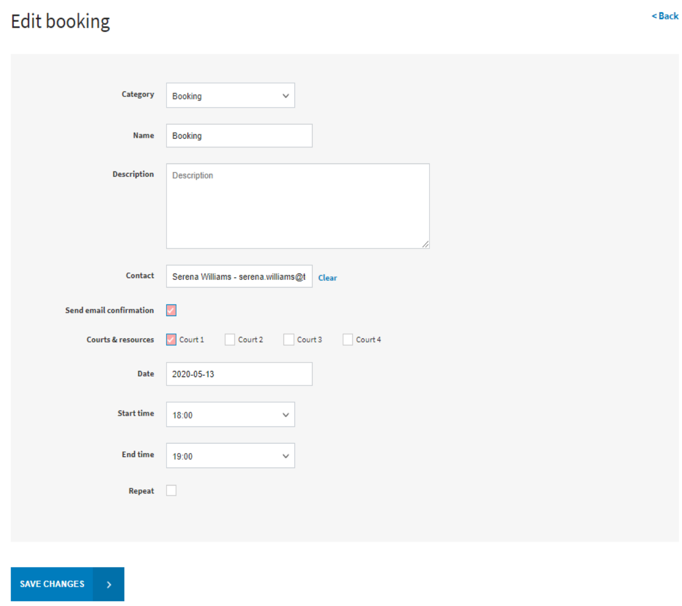
This booking will now appear on the booking sheet and in the **Booking** module for the periods that were selected.

Editing a booking

To edit an existing booking, head to the booking sheet and select the booking to which you want to edit - remember to ensure you're 'viewing as Administrator' to display the following overlay.



Click **Edit booking** in the bottom left corner.



Make the necessary adjustments to the booking

Determine whether to send a confirmation email to the contact with the updated details by ticking the box 'Send email notification'.

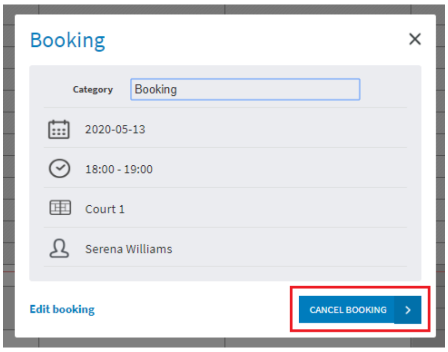
NOTE: If you're editing a recurring booking, please be aware that any edits will update the ENTIRE series of that recurring booking and not just the booking you've selected.

Ensure to click **Save changes** once all adjustments have been made.

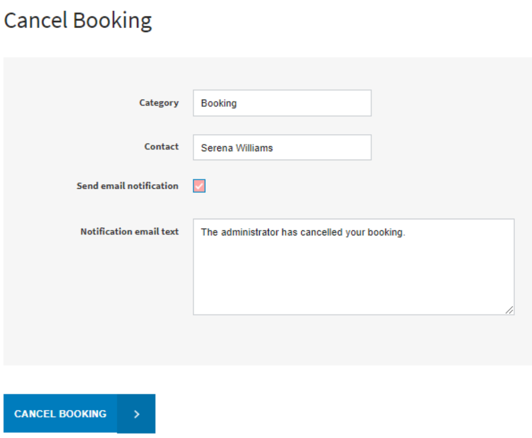
The page will refresh to the confirmation page with the updated details.

Cancelling a booking

To cancel a booking, head to the booking sheet and select the booking to which you want to cancel - remember to ensure you're 'viewing as Administrator' to display the following overlay.



Click **Cancel booking** in the bottom right corner.



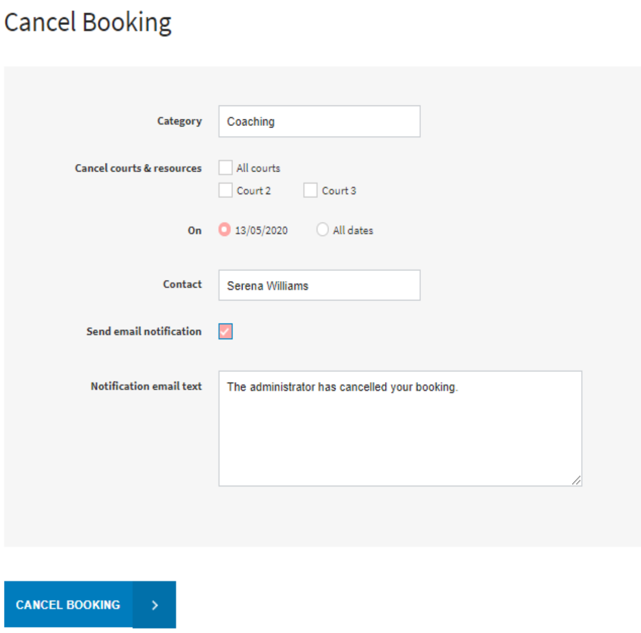
Determine whether to send a notification email to the contact with the cancellation details by ticking the box 'Send email notification'.

Clubs have the ability to add extra content to the notification email in this text box.

Then click **Cancel booking.**

The page will refresh to the confirmation page with the cancellation details.

If you're cancelling a multi-court or recurring booking, the process is slightly different. Once you've selected the booking and clicked **Cancel booking** in the bottom right corner, the following overlay will appear when it is a recurring and multi-court booking.



Select the court(s) you're wanting to cancel, by ticking the box adjacent to the court number, or use the 'All courts' box to cancel all courts.

Determine if you're cancelling the booking for the specific date you've selected on the booking sheet or select 'All dates' if you're completely removing the recurring booking.

Determine whether to send a notification email to the contact with the cancellation details by ticking the box 'Send email notification'.

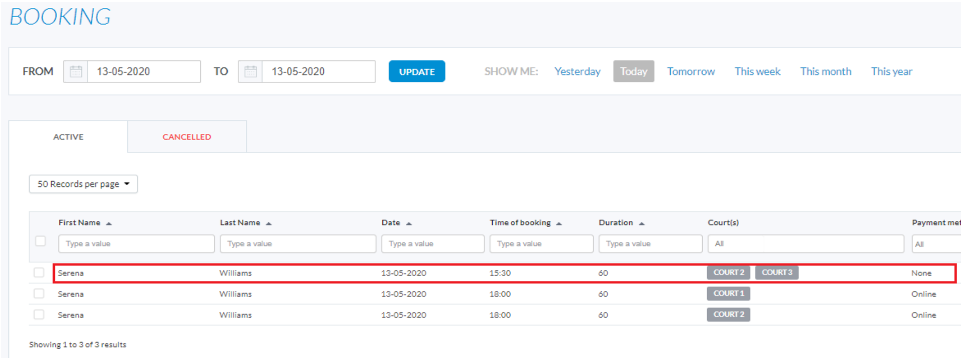
Add extra content to the notification email in this text box, if necessary.

Then click **Cancel booking.**

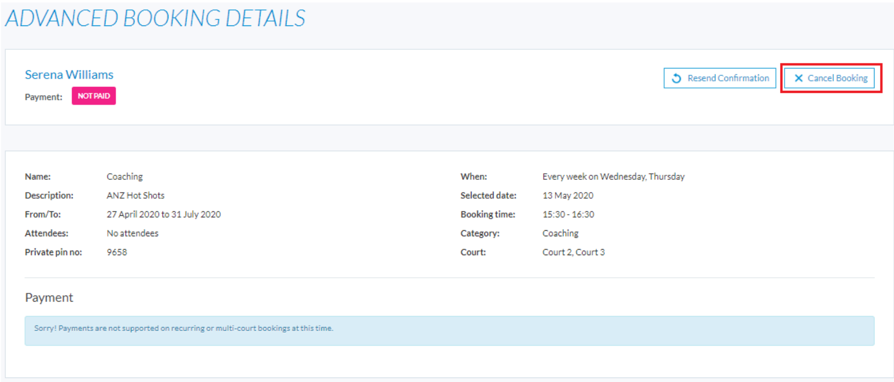
The page will refresh to the confirmation page with the cancellation details.

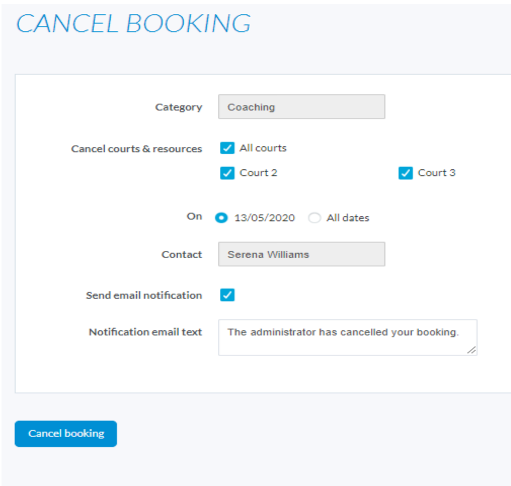
Cancellations can also be made via the main page of the **Booking** module.

Use the filters to locate the booking, then select the booking you're wanting to cancel as shown below.



This will bring up the booking details as shown below, then click **Cancel Booking** in the top right.





Select the court(s) you're wanting to cancel, by ticking the box adjacent to the court number, or use the 'All courts' box to cancel all courts.

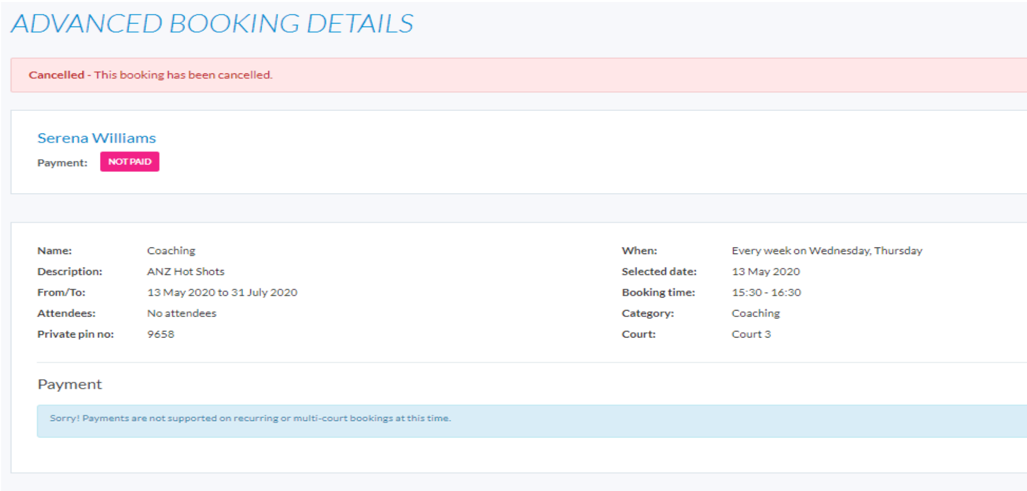
Determine if you're cancelling the booking for the specific date you've selected on the booking sheet or select 'All dates' if you're completely removing the recurring booking.

Determine whether to send a notification email to the contact with the cancellation details by ticking the box 'Send email notification'.

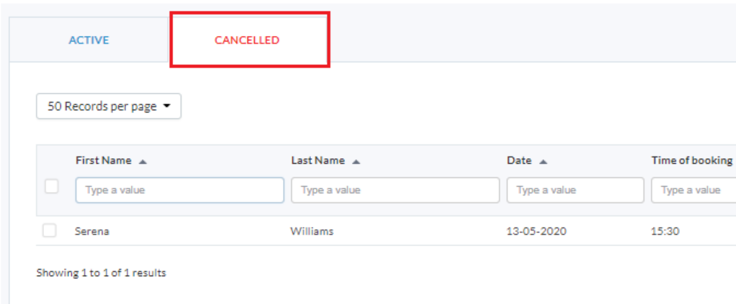
Add extra content to the notification email in this text box, if necessary.

Then click **Cancel booking.**

The page will update with a red banner at the top of the booking stating the booking has been cancelled, as shown below.



Cancelled bookings can be viewed, by clicking the **Cancelled** tab on the main page of the **Booking** module.



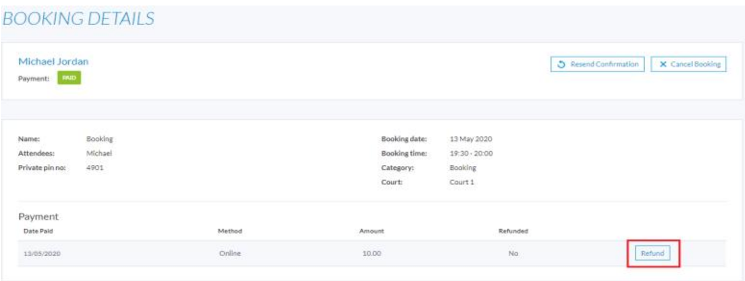
Refunding a booking

The system will provide automated refunds to players who cancel their booking a certain number of hours before their booking start time. This cancellation refund window is set by the club within the **Configuration** settings of the **Bookings** module and is explained within this user guide further below.

Venue administrators also have the ability to provide a refund manually for a booking.

Click on **Booking** from the left hand side menu and use the filters to locate the booking you want to provide a refund to, then click on the booking to open more details about the booking.

A **Refund** button will appear as shown below. Click on this button, then click **Yes** on the next overlay to complete the refund. The player should receive the refund after 3-5 business days.



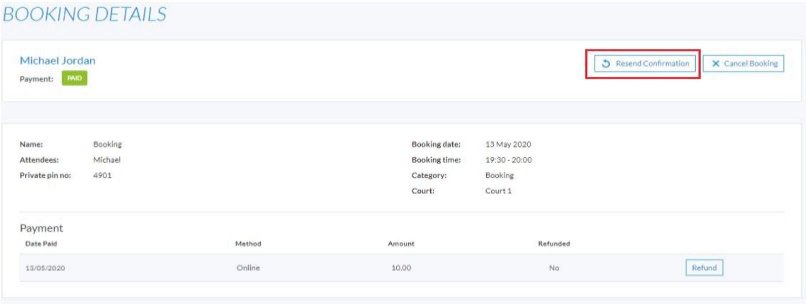
NOTE: Clubs also have the ability to provide a manual refund for a booking directly through the Stripe payment platform. Partial refunds are also possible via this process in Stripe.

Resending booking confirmation emails

When a booking is made online the player will receive a booking confirmation email. Clubs have the ability to re-send this confirmation email to the player, if necessary.

This is useful if the player has lost the email or if the booking details have been updated.

To resend the booking confirmation email, click on **Booking** from the left hand side menu and use the filters to locate the booking you want to resend the confirmation email, then click on the booking to open more details about the booking.



In the top right hand corner, click **Resend Confirmation**, then click **Yes** on the next overlay to resend confirmation.

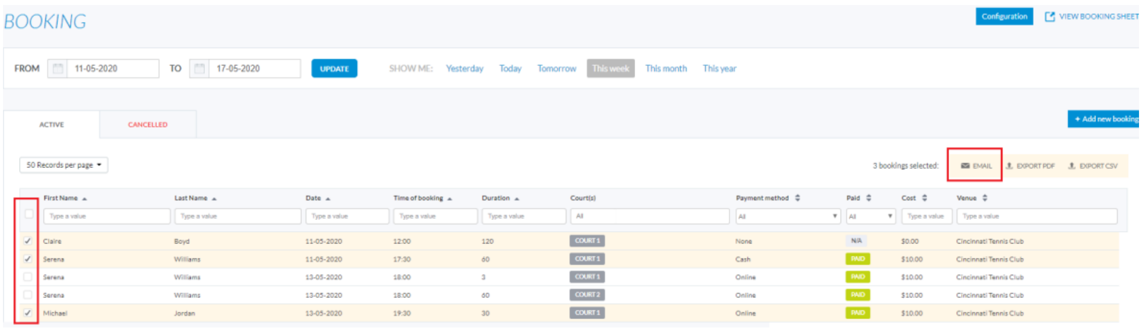
You will then receive confirmation that that the email has been sent, click **Close**.

Emailing booking contacts

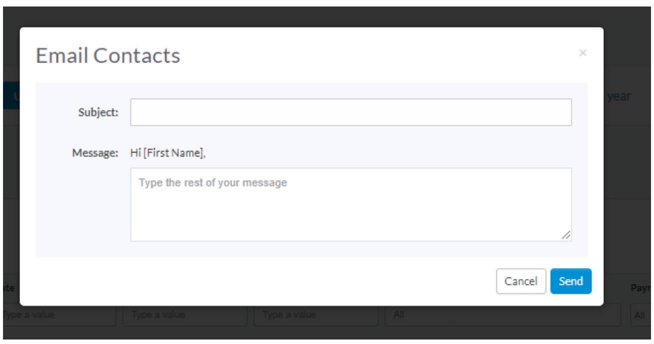
Through the **Booking** module, clubs have the ability to send a quick email to booking contacts.

Please ensure that these emails are specifically related to court hire or their booking(s).

Click on **Booking** from the left hand side menu and use the filters to locate the booking contact(s) you want to send an email to, then tick the box next to the First Name of the booking contact(s). This will bring up an **Email** button on the right, above the booking contacts as shown in the image below.



Once you've clicked the **Email** button, the following overlay will appear.



Enter the subject and the message you want to send to the booking contact(s), then click **Send**.

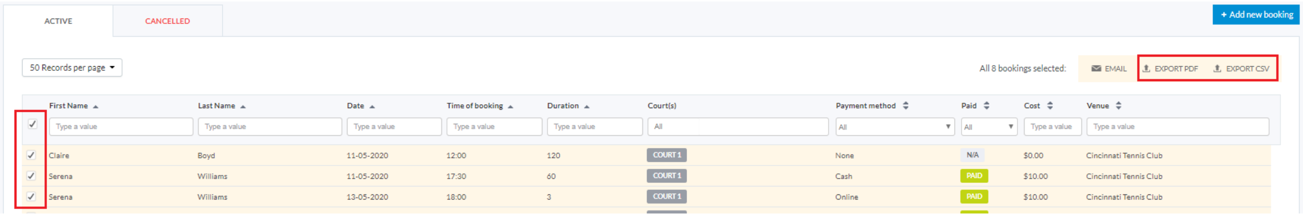
NOTE: The email message will automatically include a greeting message of "Hi" and the first name of the booking contact(s) you have selected.

The overlay will refresh advising that the email was successfully sent, click **Close**.

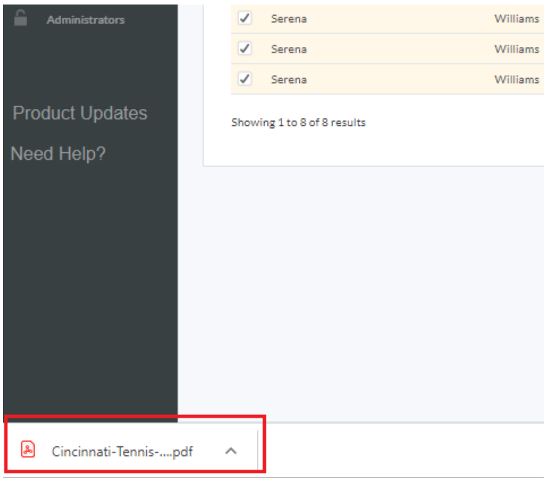
Exporting booking data

Clubs have the ability to export a list of booking data to a PDF or a CSV format.

Click on **Booking** from the left hand side menu and use the filters to locate the booking(s) you want to export, then tick the box next to the First Name column of the booking(s) you want to include in the exported report. This will bring up an **Export PDF** button and an **EXPORT CSV** button on the right, above the booking contacts as shown in the image below.



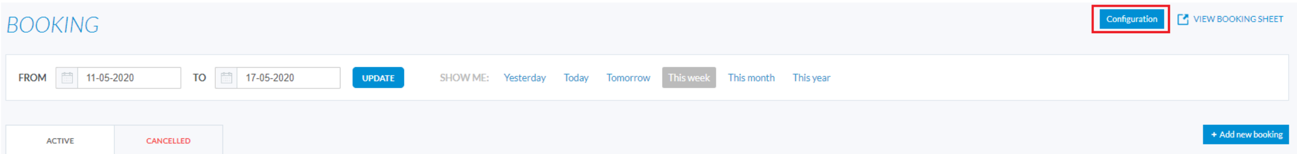
Once you've clicked your desired format, your download will begin automatically and will appear as shown below.



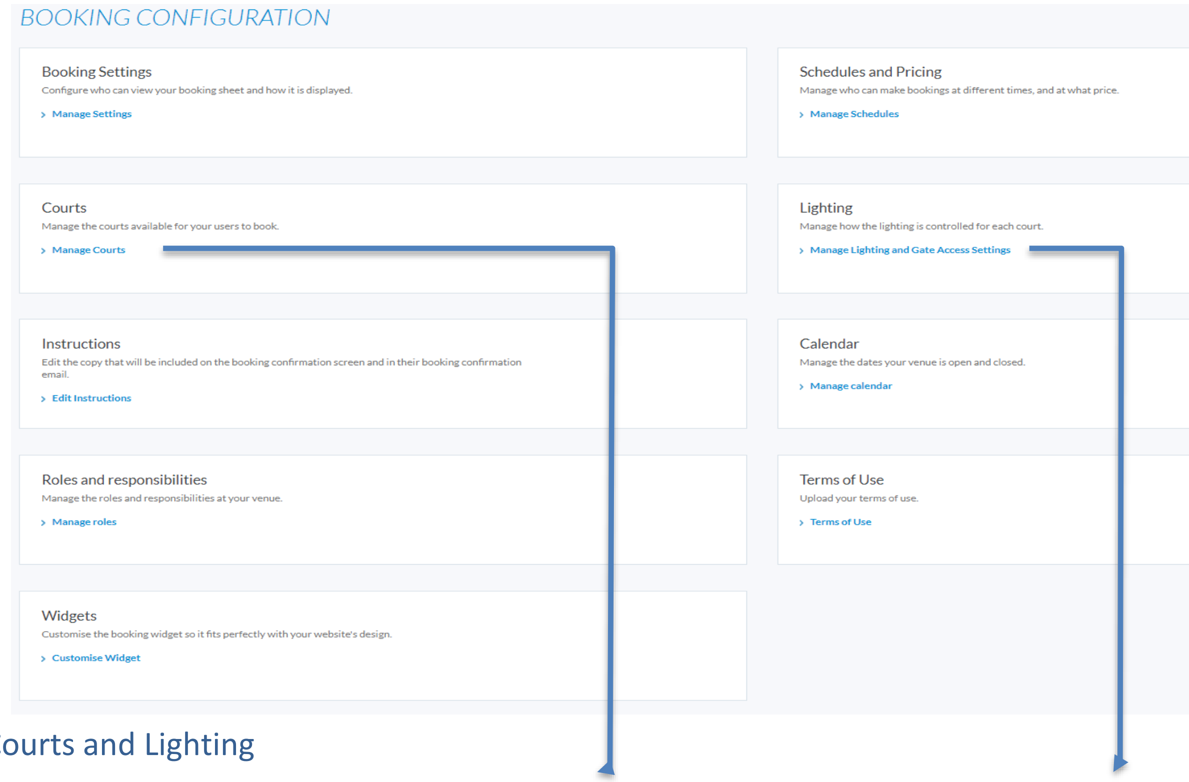
Booking Configuration

In the **Configuration** section of the **Booking** module, club admins will be able to set their pricing structure for court hire, arrange booking rules to contacts, manage roles and responsibilities and configure the display of the booking sheet.

To access these settings, click on **Booking** from the left hand side menu, then click **Configuration** in the top right corner of the page, as shown below.



Once you've clicked Configuration, the following page will be displayed. We will explain each subpage in this user guide below.



Courts and Lighting

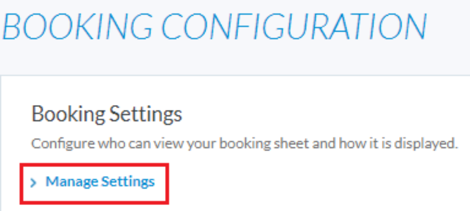
Details relating to the courts and lighting at the venue will be displayed in these settings and will reflect on the booking sheet. This information will already be set up for the venue.

It is possible for clubs to display the courts in a custom order on the booking sheet, instead of numerical order. For example, if 'Court 4' happens to be the closest court to the entry gate, the venue may decide to display 'Court 4' first on the booking sheet, as shown below.

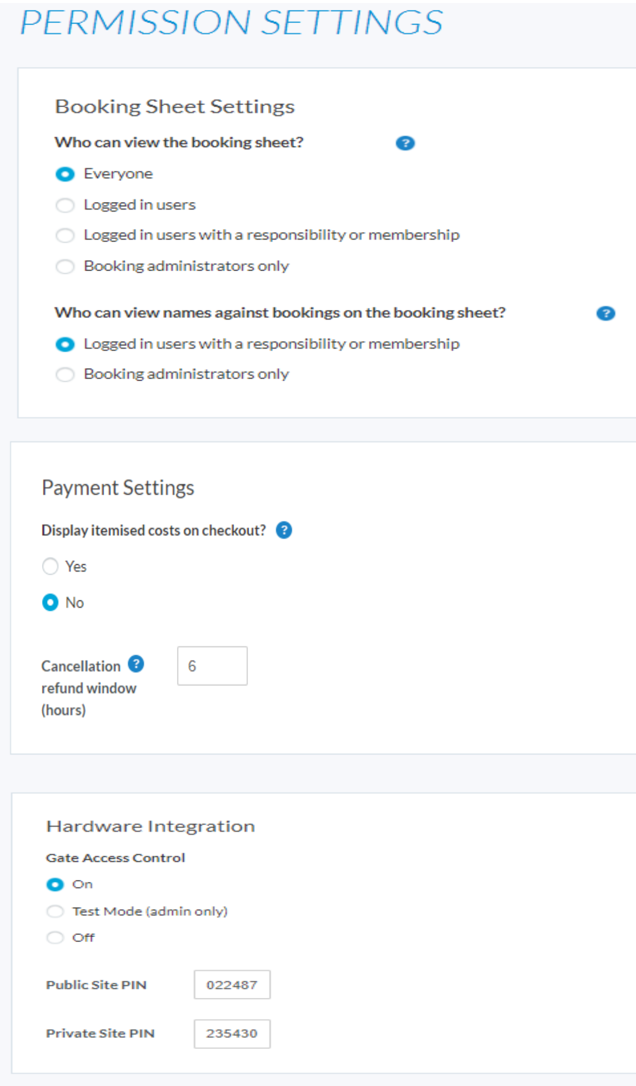
NOTE: Club admins do not have the ability to make any changes. If changes are required for courts or lighting, including the reordering of courts, please contact play@tennis.com.au.

Booking settings

To configure who can view your booking sheet, how it is displayed and set booking rules, click **Manage settings**.



Next step is to apply the necessary settings. Use the question mark bubble (**?**) to get an explanation of the setting.



Determine what users can view the booking sheet by selecting the appropriate radio button.

TIP: Clubs may decide to allow 'Booking admins only' to view the booking sheet, when first configuring the Booking module. Once the club is ready for players to make bookings, then change this settings to 'Everyone'.

Determine if contact names will appear against bookings on the booking sheet for members or users with a responsibility, or just admins only.

If itemised cost is displayed at checkout, the player will be able to see a breakdown of court and light fees.

We suggest selecting no and the player will only see the total price which allows for peak and off peak pricing to be set in your schedule

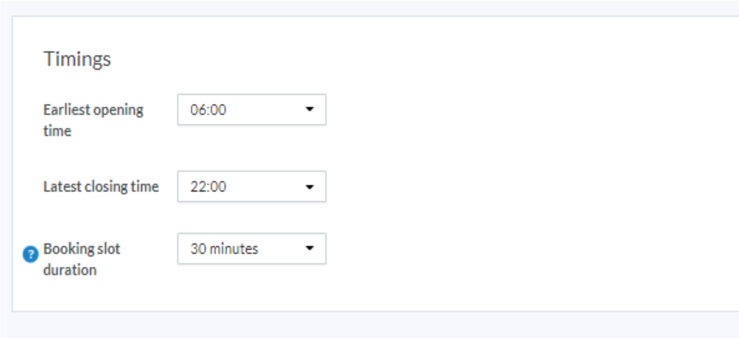
Set the cancellation refund window (in hours). This will determine when the system provides an automatic refund for bookings that have been cancelled this many hours before the start time of the booking.

Club admins will not be able to change the gate access control setting. If the venue is operating Book a Court with the gate access system, then this setting will remain on.

Venues with the gate access system have a Public and Private Site PIN that provide 24-hour access to the courts, without having to make a booking online.

NOTE: It is important that these Site PIN's are not generously shared. We recommend the public site PIN be used in situations where cleaners, maintenance contractors or council require access to the courts to perform their duties. Whereas the private site PIN only to be used by the club committee and/or coach.

Clubs have the ability to update these PINs as often as necessary, with the only requirement being that the PIN remains six digits. Simply replace the existing digits with a new combination and click **Save permission settings** at the bottom of the page. Please allow up to 30 minutes for the new combination to work.



Set the earliest opening and latest closing times for court hire, as well as the booking slot duration.

This is the minimum time a player can book a court for. We suggest setting 30 minutes to allow for bookings on the half hour and hour. I.e. if 60 minutes is selected and opening time is 6am, bookings can only be made at 7am, 8am...

NOTE: Court hire rates will be based on the booking slot duration

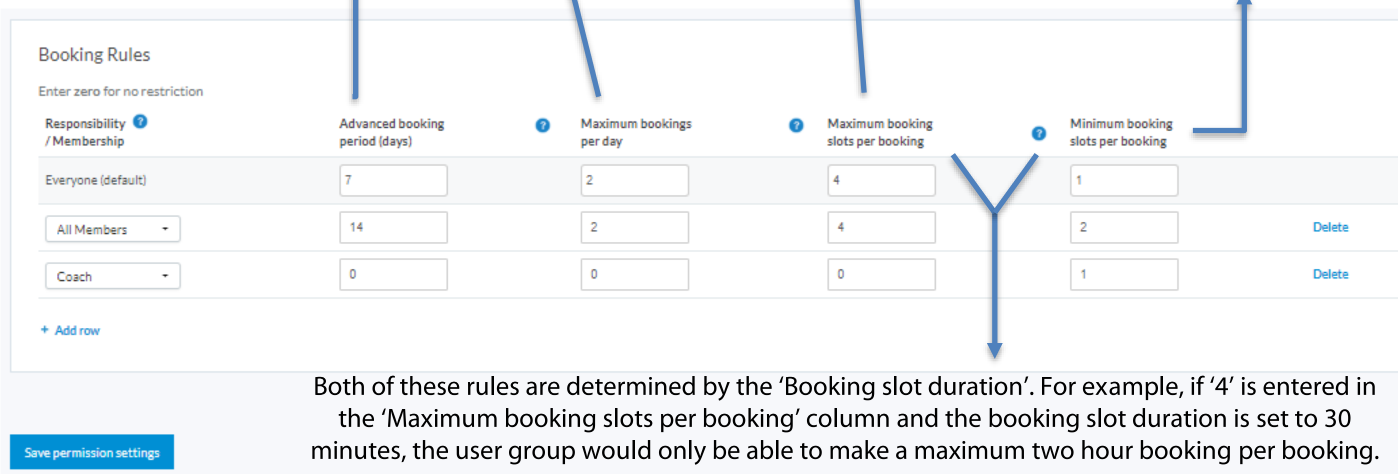
The last setting is to apply booking rules to specific users. Clubs can change these rules as often as they like and is a helpful way to police the number of bookings made by individuals.

How far in advance a user can book a court.

The **maximum** amount of bookings that can be made per day.

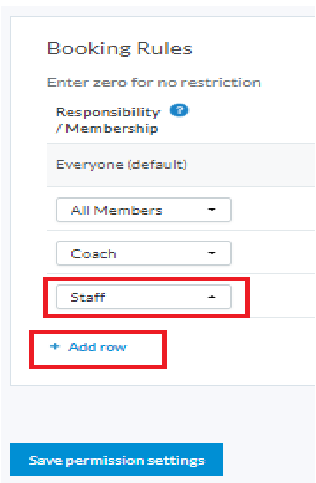
The **maximum** number of booking slots within a booking.

The **minimum** number of booking slots within a booking.



Both of these rules are determined by the 'Booking slot duration'. For example, if '4' is entered in the 'Maximum booking slots per booking' column and the booking slot duration is set to 30 minutes, the user group would only be able to make a maximum two hour booking per booking.

NOTE: If '0' (zero) is entered as a value to any rule, this allows for no restriction.



To add rules to an additional user group, click **+Add row**, then select the user group from the drop down menu.

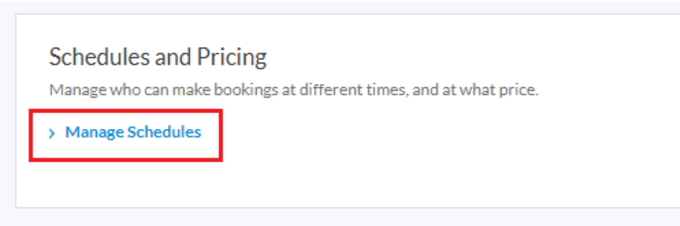
The drop down menu will display all responsibilities and active memberships available at the club.

NOTE: The 'Everyone (default)' rule will apply to any group (such as casual bookers) who you do not set a rule for.

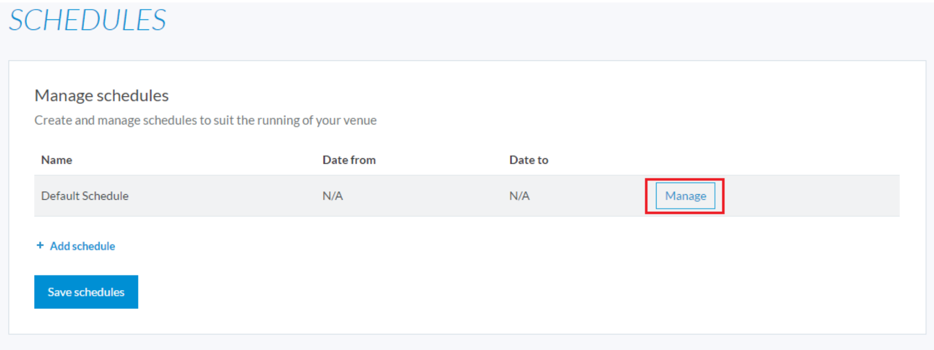
Once all settings have been set, be sure to click **Save permission settings** at the bottom of the page to apply the settings.

Schedules and Pricing

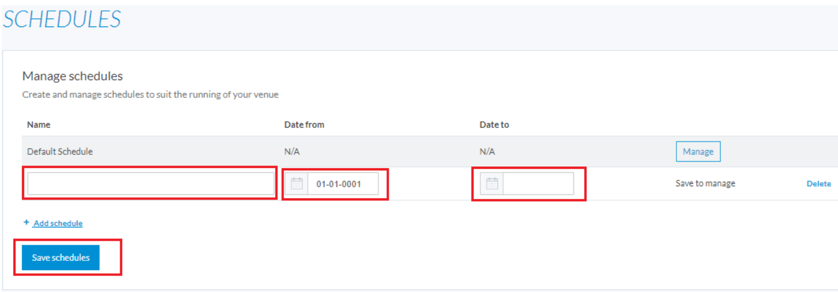
Schedules are created to suit the running of the venue and to determine who can make bookings at certain times and at what price. Click **Manage Schedules** to start.



On this page, you can choose to manage the 'Default Schedule' by clicking the **Manage** button, as shown below.



Alternatively, you can click **+Add schedule** to create a new schedule. Creating a schedule allows you to have different schedules throughout the year.



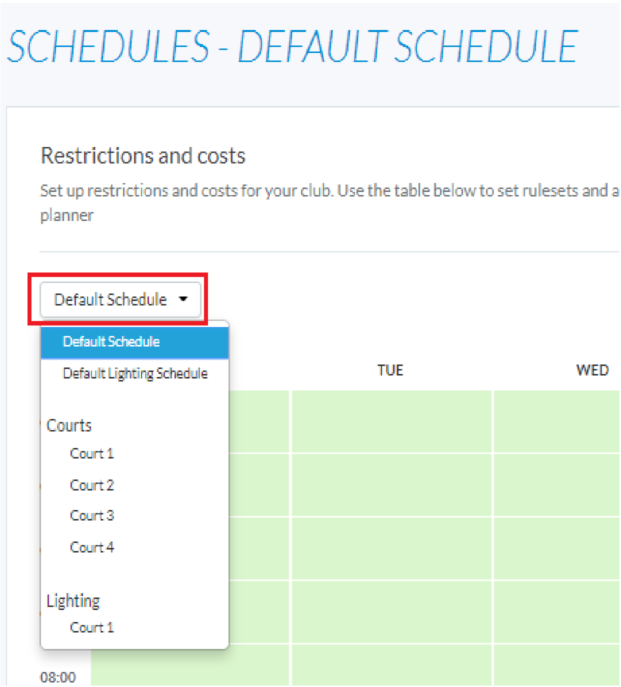
Enter the name, start and end dates of the new schedule, then click **Save schedules** to then be able to **Manage** the new schedule.

As an example, clubs could create multiple schedules that follow the Seasons (i.e. Summer, Autumn, Winter, Spring).

Once you've clicked **Manage** on your schedule, you'll be presented with a planner for the days of the week and the times the venue is opened, as shown below.

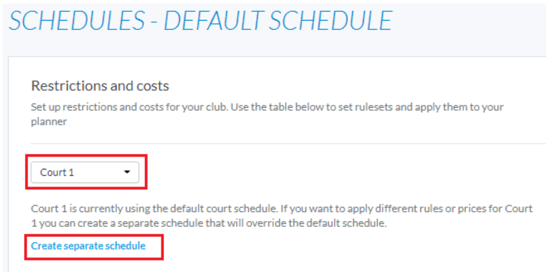
It is this page, where clubs are able to create rulesets and apply the rulesets to the planner – the planner will represent the booking sheet.

In the top left, there is a drop down menu, see image below, which will list the available courts and lights at the venue, plus a default schedule.



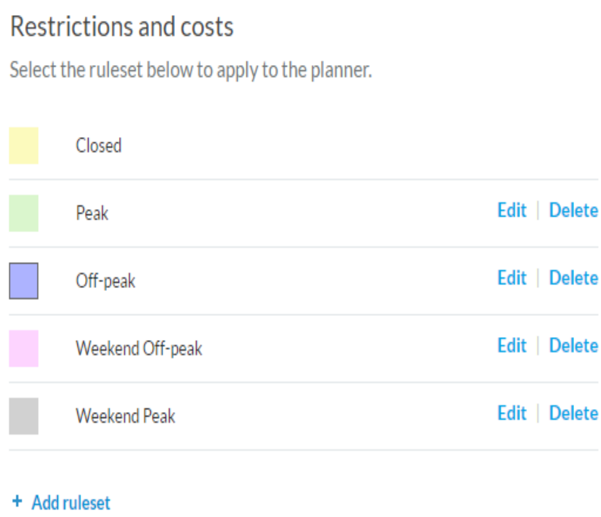
The 'Default Schedule' will be applied to all of the courts at the venue, unless a separate schedule has been created for any one of the courts.

To create a separate schedule for one or more of the courts, select the court from the drop down menu and then click **Create separate schedule**, as shown below.



A new planner will appear, where you can apply different rulesets specific to this court.
If you wish to revert back to the default schedule, click **Use default schedule**, which will appear under the rulesets.

Adjacent to the planner under the title 'Restrictions and costs', is where you can add and edit rulesets, which are to be applied to the planner.



Click **+Add ruleset** to create a new ruleset or click **Edit** next to an existing ruleset, which will display an overlay where you can decide which user group can book under this ruleset and at what cost.

To apply a ruleset to the planner, click on the coloured box corresponding to that ruleset you're wanting to apply and then click on the time and day you wish to apply it to.

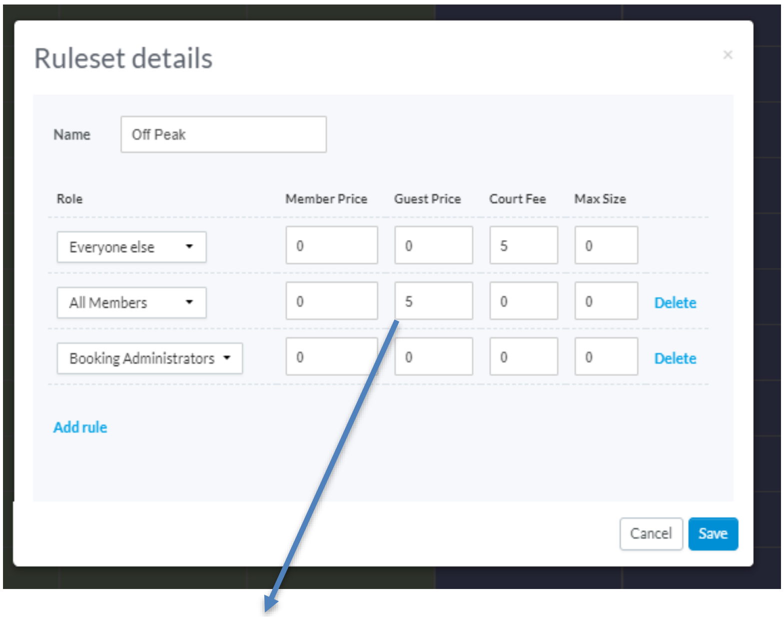
TIP: You can click on a booking slot on the planner, hold down the mouse button and then move your mouse across the other booking slots to apply the ruleset quickly.

The planner will be filled with the colour of the ruleset that you've applied. This helps to indicate which ruleset is being applied at a certain time and day.

NOTE: Courts can be closed by clicking on the colour box corresponding to the 'Closed' ruleset and then applying to the planner.
Remember to click **Save schedules** at the bottom of the page to apply the changes.

We suggest a simple set up of "Off-Peak" and "Peak" rulesets, which distinguishes a higher fee for court hire during the "Peak" ruleset to cater for the costs of running lights. The "Peak" ruleset would be applied to the planner at times the lights are suggested to be used or when court hire is in high demand (e.g. weekends), whereas the "Off-Peak" ruleset will be applied during the day. By setting up the schedules this way, a lighting schedule is not required to be used.

Once you've added a ruleset or clicked **Edit** to an existing ruleset, the following overlay will appear, allowing you to add a role of who is able to book and at what price under this ruleset.



Enter a name for the ruleset.

Click **Add rule** to add additional user groups to the ruleset, then enter a value in the 'Court Fee' column.

The 'Everyone else' rule will apply to any group (such as casual bookers) who you do not set a rule for.

NOTE: Remember that these values will be based off the booking slot duration. Therefore, if the booking slot duration is set to 30 minutes and you're wanting to charge casual players $10 per hour, then enter '5' as the court fee, as shown in the image to the left.

Add a value in the 'Guest Price' column for members, if the club charges members a fee for playing with a guest (non-member). Add a value (up to 4) in the 'Max Size' column to cap the additional guest price fee per guest. For example, if '2' is the 'Max Size', then when a member makes a booking and adds 3 guests to the booking they will only be charged for the 2 guests.

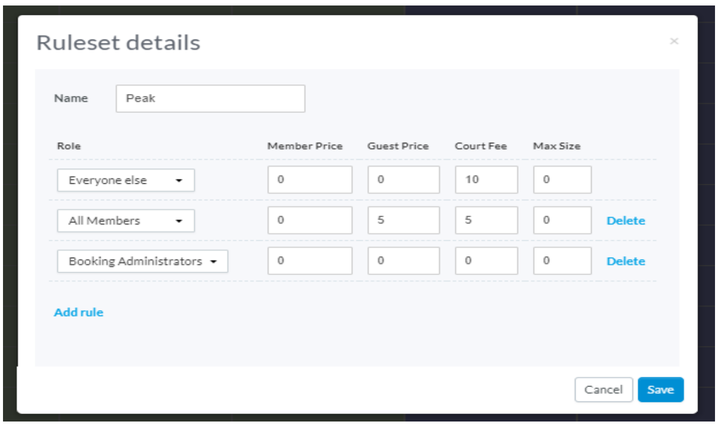
NOTE: For the guest price to be applied at the booking checkout, members will need to ensure they add their guest to the booking, by selecting **Add Player**, entering their name and then select the **Guest** radio button. A reminder that this is not a mandatory feature and thus clubs will need to educate members and police this themselves.

Click **Save** in the bottom right, once all details have been added.

Based on the booking slot duration being set to 30 minutes, the above "Off Peak" ruleset example is applying the following rules:

- Casual players will be charged $10 per hour
- Members will be able to book a court for free
    - If a member adds a guest to their booking, they will be charged $10 per guest per hour
- Booking administrators will be able to book a court for free

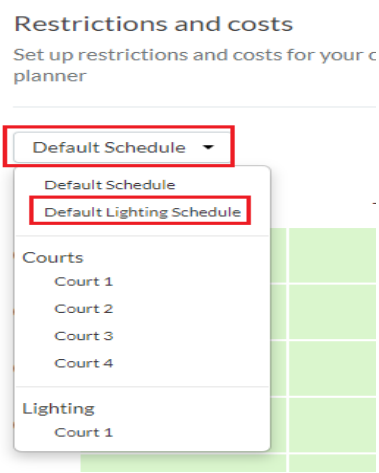
Based on the booking slot duration being set to 30 minutes, the below "Peak" ruleset example is applying the following rules:



- Casual players will be charged $20 per hour
- Members will be charged $10 per hour
    - On top of their court fee, if a member adds a guest to their booking, they will be charged $10 per guest per hour
- Booking administrators will be able to book a court for free

If clubs would like to display a breakdown of court hire costs on checkout (i.e. court fee + lighting fee), then a lighting schedule is required to be used.

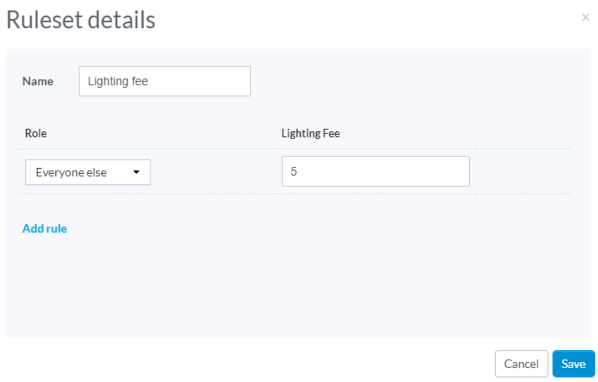
In the drop down menu of the schedule, there is a list of available lights at the venue plus a default lighting schedule – which will represent all of the courts unless you create a separate schedule for any of your available courts with lights.



Adjacent to the planner under the title 'Restrictions and costs', is where you can add and edit rulesets, which are to be applied to the planner.

Click **+Add ruleset** to create a new ruleset or click **Edit** next to an existing ruleset, which will display an overlay where you can decide which user group will be charged a lighting fee under this ruleset and at what cost.

Once you've added a ruleset or clicked **Edit** to an existing ruleset, the following overlay will appear, allowing you to add a role of who will be charged for playing under lights and the associated fee.



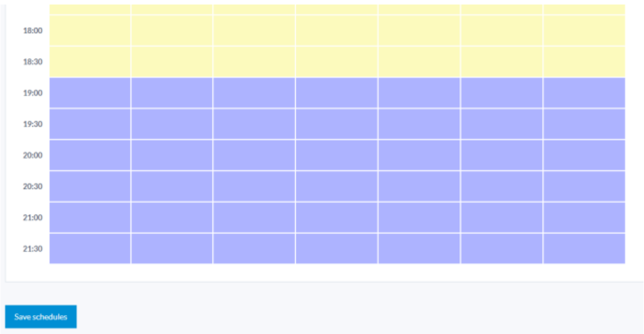
Enter a name for the ruleset.

Click **Add rule** to add additional user groups to the ruleset, then enter a value in the 'Lighting Fee' column.

This example to the left indicates that everyone (i.e. members & non-members) will be charged $5 per booking slot in addition to the court fee set in the rulesets of the default schedule.

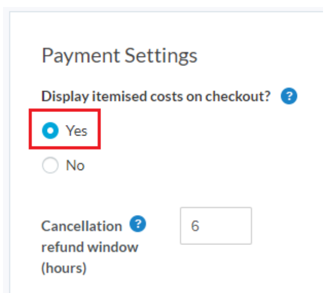
Click **Save** in the bottom right, once all details have been added.

The next step is to apply this ruleset to the planner at the times you believe players should be charged a lighting fee for using lights.



Remember to click **Save schedules** at the bottom of the page to apply the ruleset.

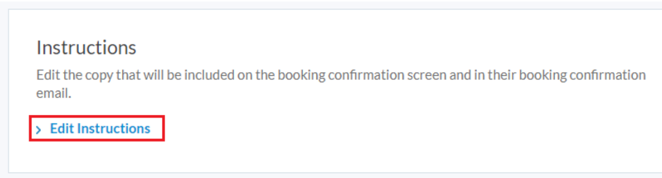
NOTE: Ensure the below setting within the **Booking Settings** is set to **Yes**, for the itemized costs to display on checkout.

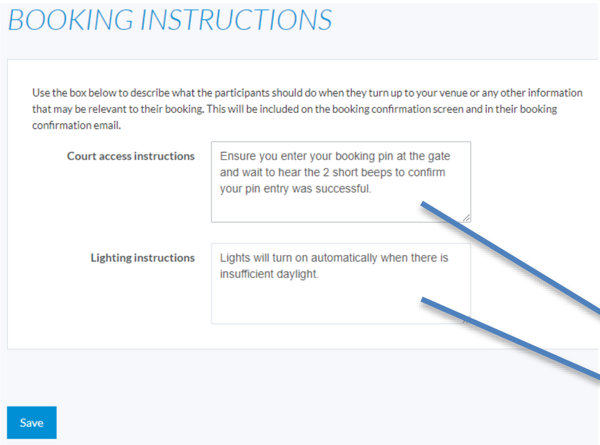


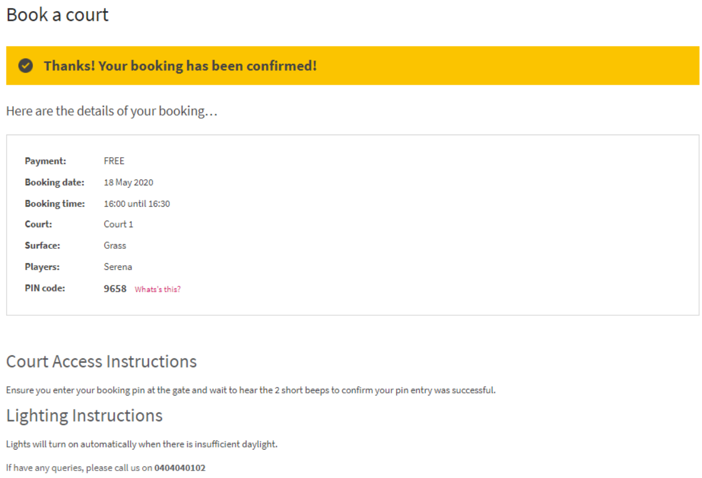
Instructions for court access and lighting

Clubs have the ability to include custom instructions for court access and lighting relevant to their venue to assist players with their overall booking experience. These instructions will appear on the confirmation screen and in the booking confirmation email.

Click **Edit Instructions**, then enter the instructions in the respective boxes, as shown below.





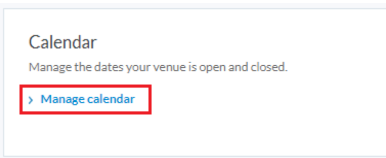


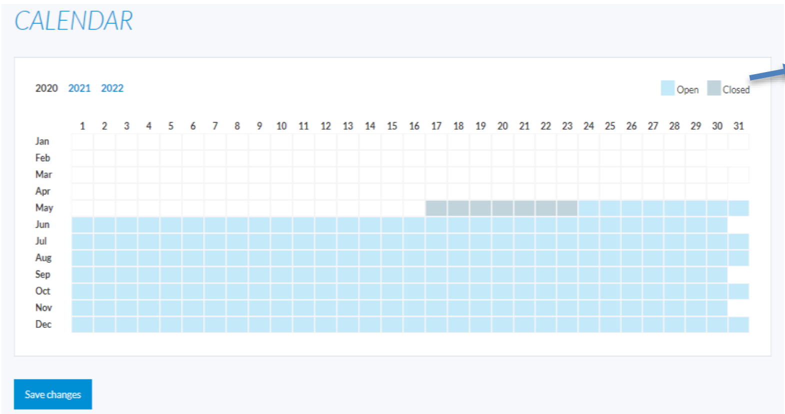
Ensure to click **Save** at the bottom of the page once the instructions have been entered.

NOTE: There is a 1000 character limit for both instruction boxes.

Calendar

Clubs can use the calendar to manage the days the venue is open and closed throughout the year. Click **Manage Calendar.**





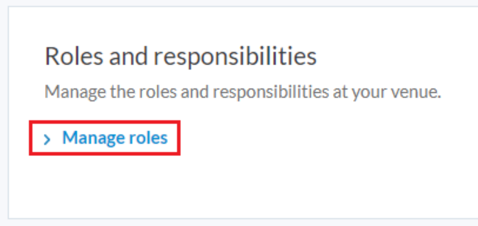
The days the venue is opened and closed is distinguished by these coloured boxes.

By clicking on a date it will set the day to 'Closed', ensure to click **Save changes** at the bottom of the page to apply the changes.

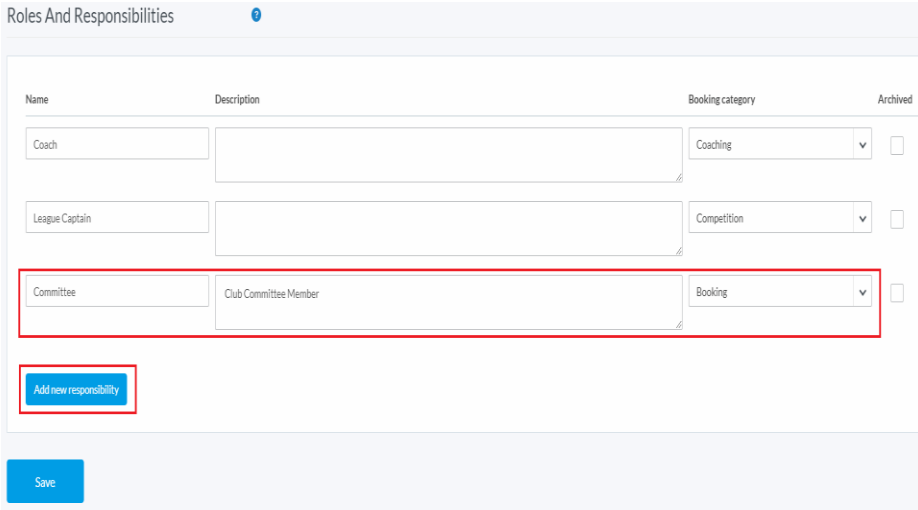
To re-open a day that has been closed, simply click on the day that has been closed and it will then display as 'Open', then click **Save Changes**.

Roles and responsibilities

Responsibilities are used to provide certain contacts with specific booking rules and pricing. To add new responsibilities at your venue and determine their default booking type click **Manage roles**.



The responsibility of ‘Coach’ and ‘League Captain’ will be added as default responsibilities.

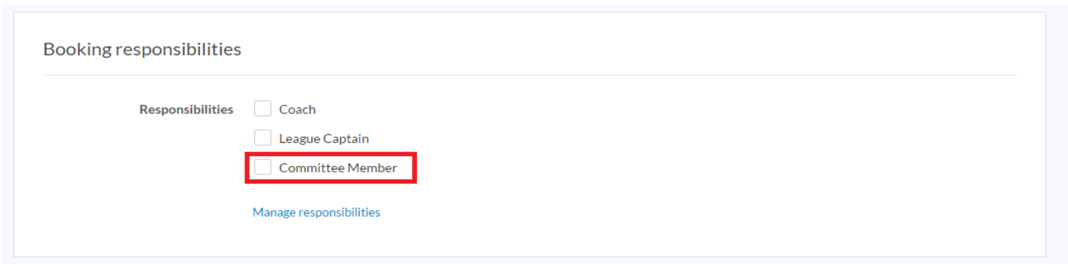


Click **+Add new responsibility** to create an additional responsibility for the venue.

Give the responsibility a name, description and determine the default booking category for this responsibility by using the drop down menu.

Click **Save** to apply the changes.

Your new responsibility will now become an option to assign to a contact as shown below.

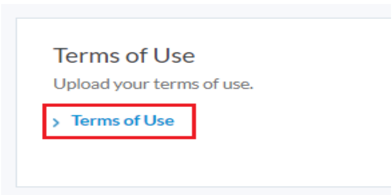


NOTE: For venues who have installed the gate access system, the ‘Booking category’ will determine how the gate behaves when a booking pin is entered.

For example, if the ‘Booking category’ for your ‘Coach’ responsibility is set to **Coaching**, then when the coach enters their booking pin, the gate will remain unlocked for the full duration of the booking.

Terms of Use

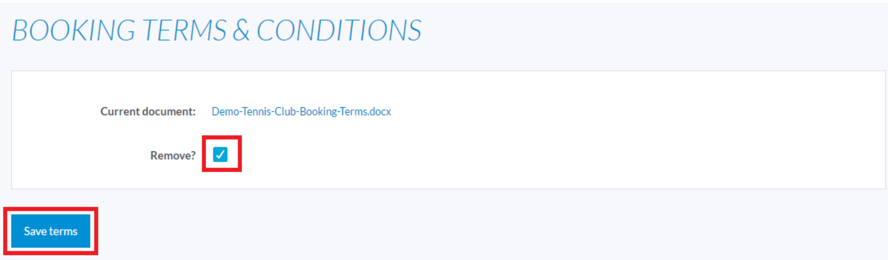
When players book a court online for the first time at the venue, they will need to agree to the venue’s terms and conditions. Club admins can manage the terms and conditions from this setting – click **Terms of Use.**



To upload your venue's booking terms and conditions click **Browse**, then locate and select your file from your computer and click **Open**.

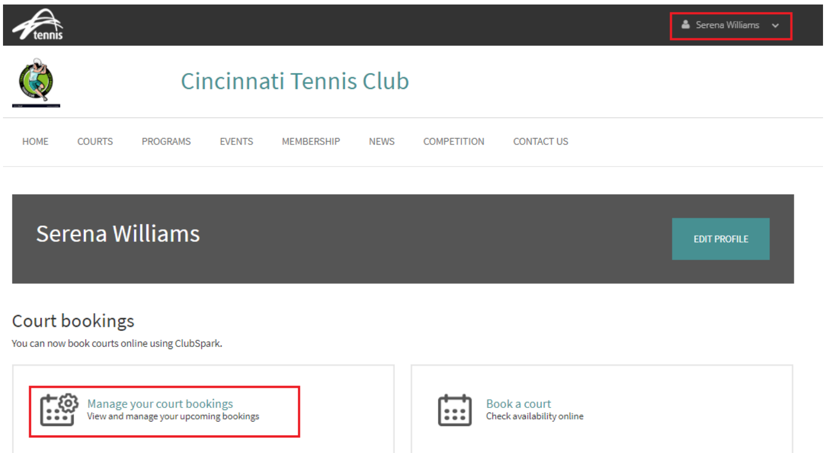
Once your file has been added, click **Save terms** to upload the file.

A sample terms of use will be added to the settings by default, to update/upload your own venues bookings terms of use, you will need to remove the current document, by checking the box next to 'Remove', then click **Save terms**.

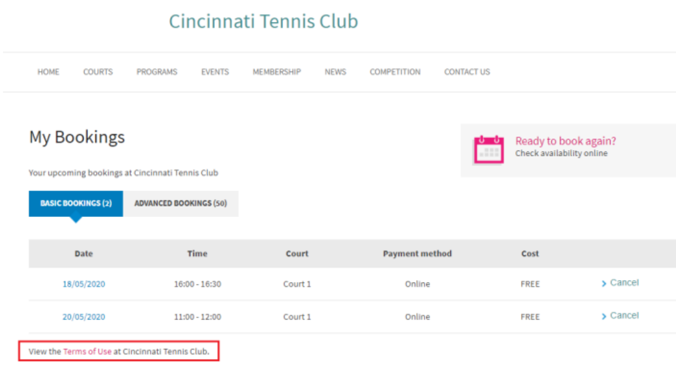


You will then have the ability to browse your computer to upload your updated terms and conditions document and save, by following the previous steps.

Registered users will be able to view the terms and conditions by clicking on their profile (click their name) from the venue's landing page and then click **Manage your court bookings**, as shown below.



The following page will display, where users can download and view the Terms of Use.

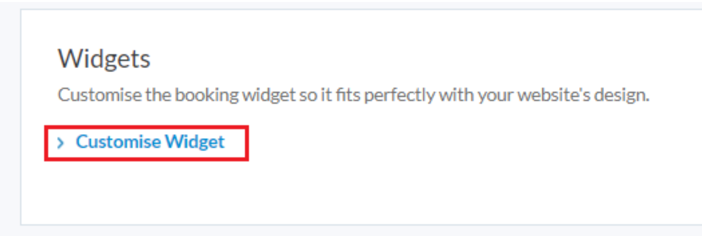


Widgets

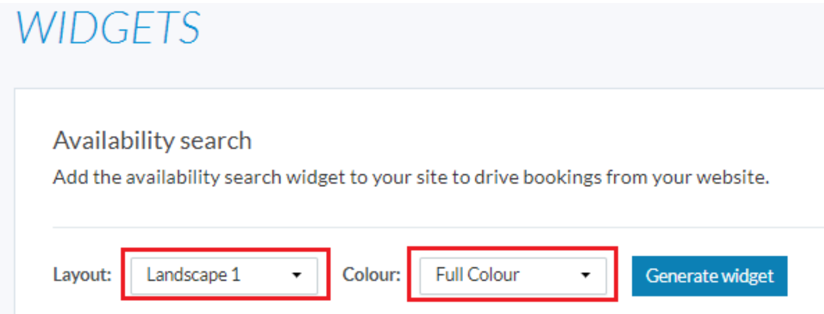
A booking widget can be generated and added to the club's website, allowing players to book directly from the website.

NOTE: Please seek advice from the website developer to assist with copying & pasting the coding onto the club website.
If the venue is using the ClubSpark Website module for their website, then generating a widget is not required, as the booking sheet will be displayed instead.

To generate a widget, click **Customise Widget**.



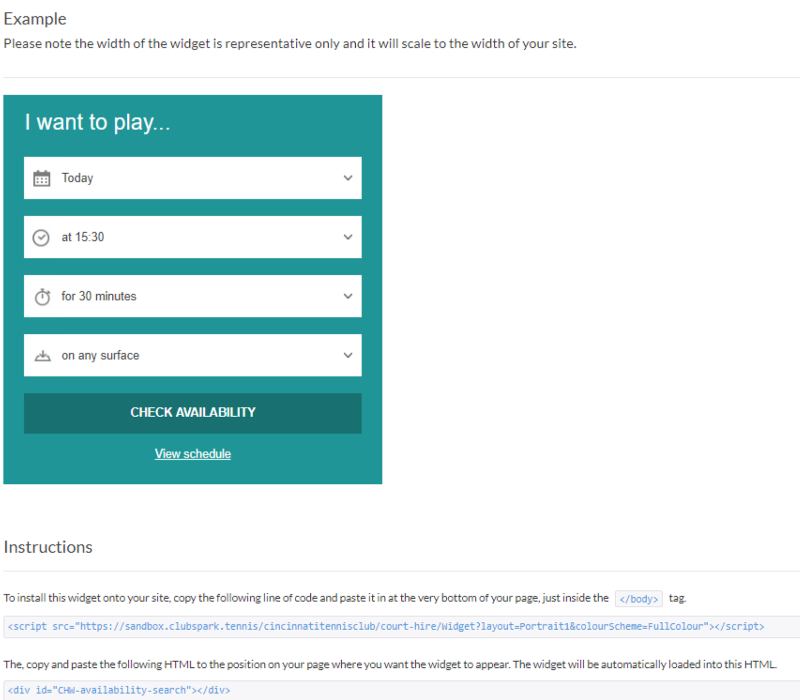
Use the drop down menus to select the widget layout and colour that will best suit the website's design, then click **Generate widget**.



Once the widget has been generated, you'll be presented with an image of the design.

If the layout and colour don't meet your design requirements, then select another layout and colour option and generate the widget again.

Once you're happy with the look of the widget, follow the instructions to add the widget to the club website.



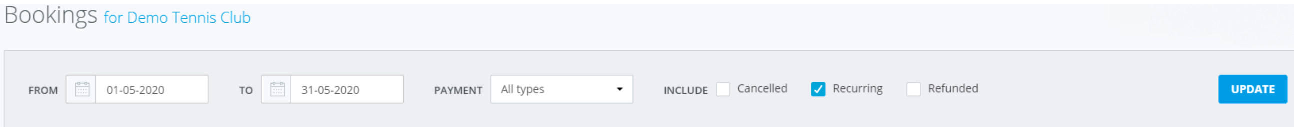
Dashboard Module

The dashboard provides clubs with data relating to all bookings at the venue to identify the performance and growth of the club using the Booking module.

To access the dashboard, click **Dashboard** from the left hand side menu.

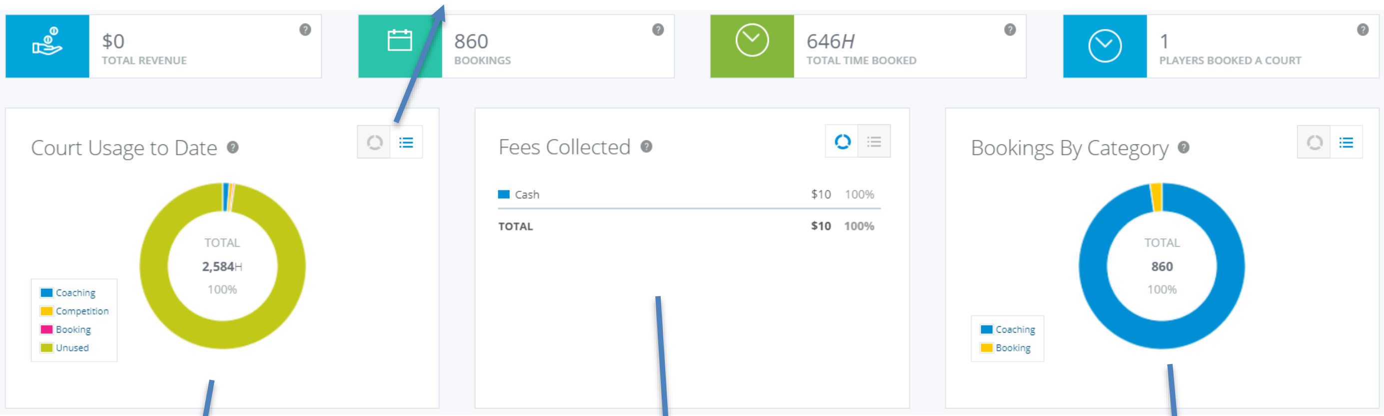
Use the filters at the top of the dashboard page to filter your search, then click **Update** to display the required data.

By ticking the 'cancelled', 'recurring' or 'refunded' boxes will include these bookings in the statistics.



NOTE: The Dashboard will automatically display the current month's data by default. Click the question mark bubble (**?**) to display the description of the data.

Click this button to change the way the data is displayed – graph view or detailed view.

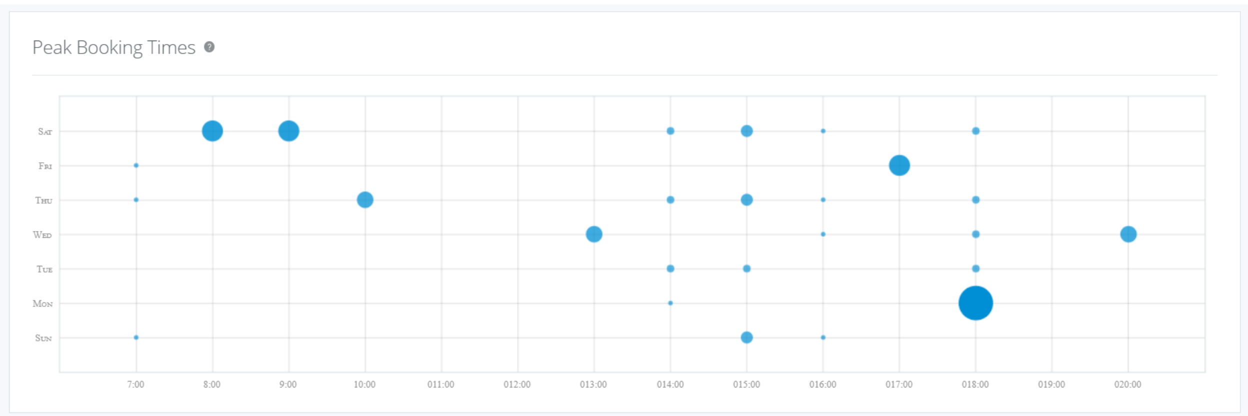


The total hours of courts used against the courts available.

The total amount of fees collected, identified by payment options (cash, online, cheque and/or other)

The total number of bookings made by booking category (booking, coaching, competition, event, etc).

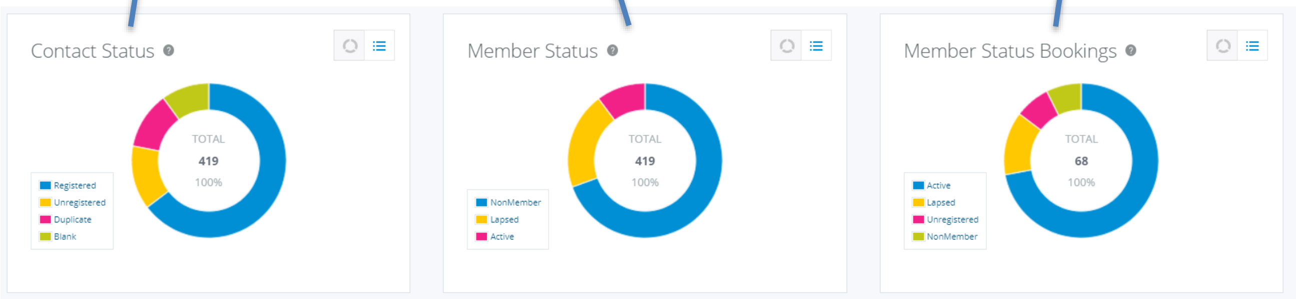
The below graph shows the most popular times for court bookings. The size of the dot refers to the popularity of that booking time slot. Using the below graph as an example, Mondays at 6:00pm (largest dot) is the most popular.



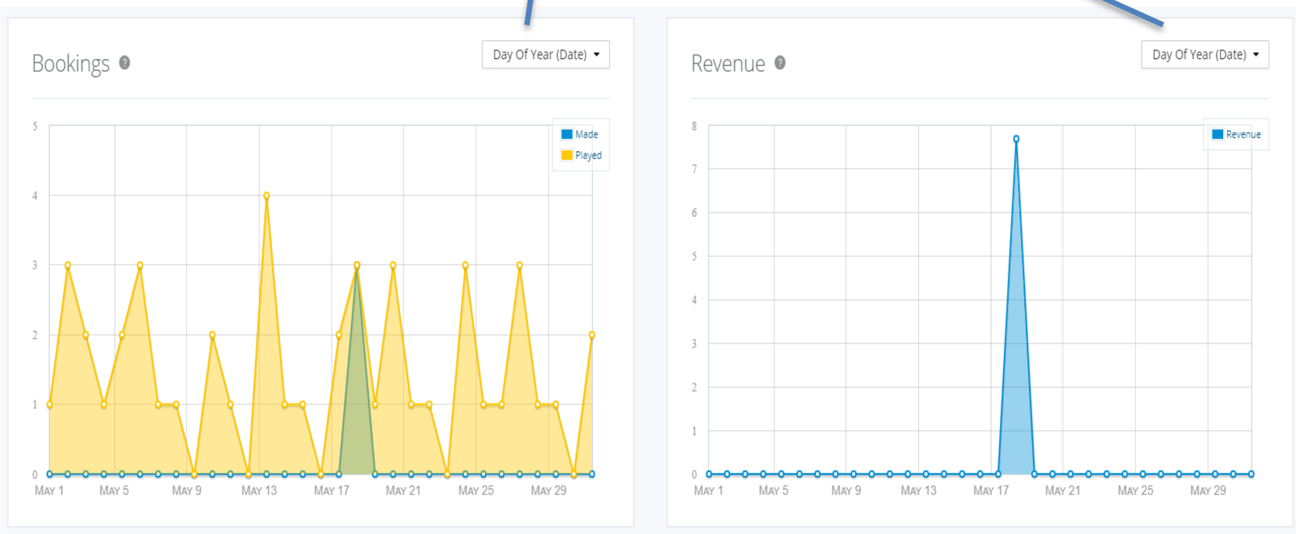
The total number of contacts by status (registered, unregistered, invited, no email, repeat email).

The total number of contacts by membership status (active, lapsed, non-member).

The total number of bookings made by active members, lapsed members and non-members.



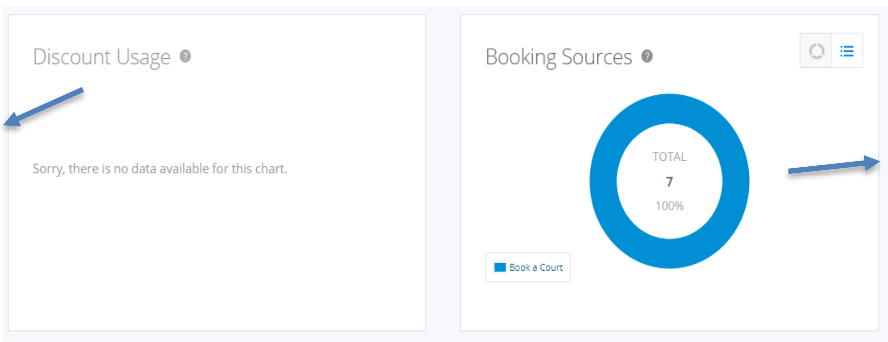
Use the drop down menus to display the graph in a different time format (hour, day, date, week, month).



The total number of bookings made and bookings played in a line graph.

The total amount of revenue received from bookings in a line graph.

The total amount of discounts used on bookings.



The total number of bookings made between the National website (play.tennis.com.au) and the Booking module in ClubSpark.

Clubs have the ability to download reports from the Dashboard by clicking on one of the below tiles.

Use the drop down menu in the top right to change the date range of the data that is exported. To download a full year of data, you would need to download 4 reports.

For example, to download a 'Bookings Played' report for the 2019/2020 period, you would need to download the following reports:

1. Quarter 3 2019
2. Quarter 4 2019
3. Quarter 1 2020
4. Quarter 2 2020

NOTE: Reports will be downloaded in CSV format. The 'Bookings Made' and 'Bookings Played' reports will include recurring and cancelled bookings.