sportlomo

Recurring Payments Setup

<u>Step 1</u> – Login to your club account and click begin selling.

Members/Team Sheets	Club Details	Your Web Site	
D Invoicing and Fees D Team Sheer Parets	O Eas Profile		
Communications	Membership	Sanctioning	
Notifications	View Menibers Payments Received Transfers/Dual Membership	Sanctioned Credentials	
Membership Setup	Events	Settings	
Fayment Methods	© Events	O Manage User Accounts	
Additional Feet/Taxes	O Orders		
O Enal Notifications	Refunds issued		
Member identifiers	O Events Purchased		
Membership Categories	O Atlended		
O Membership Types	Purchase Events		
Discours Codes	O Events Tearro		
O Degin selling	Covents Waiting in Dasket Covent Facilitators		

<u>Step 2</u> – Next you can click Add to start from fresh or edit an existing package setup.

		Begin Selling			
Members	hip Packages Available for Sale				← Back
		Contons A Contons Contons			
	nt methods is not fully active (GBPM-001)	 Search/hiter options 			
Active	Name 0	Price +	Featured 0	Season	Acti
0	Youth Rec Player	13.13	0	2021	* <u>*</u> B
0	12U Youth Competitive Player	64.05	0	2021	* ~ B
0	13U Youth Competitive Player	74.55	0	2021	* * B
0	14U Youth Competitive Player	74.55	0	2021	* * 3
0	15U Youth Competitive Player	74.55	0	2021	÷ ~ (8)
0	16U Youth Competitive Player	74.55	0	2021	* - B
0	17U Youth Competitive Player	74.55	0	2021	* * 3
0	18U Youth Competitive Athlete	74.55	0	2021	* * B
0	Coach	74.55	0	2021	* * 3
0	Coach (Recreational)	13.13	0	2021	* * (3)
•	Recurring payment cat with taxes	168.25	0	2021	* * 3
0	Recurring payment cat without taxes	170.00	0	2021	* * B,

<u>Step 3</u> – Fill out the package information as usual, title, season, selling from/selling to and add the type you plan to use for the package.

WHOME THEP A MEACCOUNT								
			Begin Selling					
Add New Membership Package	5							
Packa	ge Details		Installment Setup	Membership Types				
Fill in package details.		Define Installment Setup - for dub portion of the fee		Select membership types to add				
Name Youth Rec Player		Installment Interval Type	None - O	+ Youth Recreational Player + 13U Youth Competitive Player				
Description Optional short		Installment Interval	0	+ 14U Youth Competitive Player + 15U Youth Competitive Player				
description - include any program dates		Number Of Installments	0	+ 16U Youth Competitive Player + 17U Youth Competitive Player				
	1			+ 18U Youth Competitive Athlete + Coach (Recreational) + Coach				
Season 2021 -				+ 12U Youth Competitive Player + Valleyball BC General Membership				
Festured O				+ Level 2 (Provincial) Referee + Level 1 (Local) Referee + Level 3 (Regional) Referee				
Selling From 2020-12-21				+ Level 4 (National) Referee				
Selling To 2021-09-3				+ Recurring payment cat with taxes + Recurring payment cat without taxes				
۲.			Membership(s) in Package					
			Membership types included in this package					
pe	Union Price	Club Price	Club Deposit	Initial Payment Fees User Pays Out				
outh Recreational Player	13.13	0	0	13.13 0.92 13.13				

<u>Step 4</u> – You will notice Instalment setup on the package setup with 3 distinct options.

- First is the Instalment interval type, weeks, months or years, I select month.
- The next option is the instalment Interval, I select a value of 1.
- Finally, is number of instalments of which I selected 4.

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		E	Begin Selling				
Add New Membership Package							€ Back
Package	Details	In	stallment Setup		Membership Typ	5	
Fil in package details		Define Installing	ent Setup - for club portion of the fee		Select membership types to	add	
Name Youth Rec Player	8	installment interval Type None - 🛛		+ Youth Recreational Player	+ 13U Youth Competitive	Player	
Description Optional short		Installment Interval None	0	+ 14U Youth Competitive Player		titive Player	
description - include any program dates		Number Of Installments Weeks	0	+ 16U Youth Competitive Player		titive Player	
		Months		+ 18U Youth Competitive Athlete		nal) 🕂 Coach	
Season 2021 -				+ 12U Youth Competitive Player		ral Membership	
Featured @		Years		+ Level 2 (Provincial) Referee		e 🛛 🕂 Level 3 (Regional)	Referee
Selling From 2020-12-21				+ Level 4 (National) Referee		Referee	
Selling To 2021-09-3				+ Recurring payment cat with tax	es + Recurring paym	nent cat without taxes	
		Memb	pership(s) in Package				
		Membersh	ip types included in this package				
	Union Price	Club Price	Cub Deposit	Initial Payment	Fees	User Pays	Outstanding
uth Recreational Player	13.13	0	0	13.13	0.92	13.13	0
		Save			Delete		

So, this means, once a month for 4 months the member will be debited.

# HOME ? HELP & MY ACCOUNT							IN LOGOUT	
		Be	gin Selling					
Add New Membership	Package						÷ 84	
	Package Details	Insta	Installment Setup			Membership Types		
	Fill in package details.	Define Installment Setup - for club portion of the fee		Select membership types to add				
Name Youth Re	x Player	Installment Interval Type Months - O		+ Youth Recreational Player +	13U Youth Competitive	Player		
Description Optional		Installment Interval	1 0	+ 14U Youth Competitive Player		tive Player		
	on - include Iram dates	Number Of Installments	4 0	+ 16U Youth Competitive Player		tive Player		
			K	+ 18U Youth Competitive Athlete	+ Coach (Recreation	al) 🕂 Coach		
Season 2021	-			+ 12U Youth Competitive Player		al Membership		
Featured @				+ Level 2 (Provincial) Referee		+ Level 3 (Regional)	Referee	
Selling From 2020-12-	21			+ Level 4 (National) Referee +		eferee		
Selling To 2021-09-	3			 Recurring payment cat with taxe 	s + Recurring paym	ent cat without taxes		
		Member	ship(s) in Package					
		Membership ty	pen included in this package					
æ	Union Price	Club Price	Club Deposit	Initial Payment	Fees	User Pays	Outstand	
uth Recreational Player	13.13	0	0	13.13	0.92	13.13		
		Save			Delete			

Finally, I add my value and the club deposit.

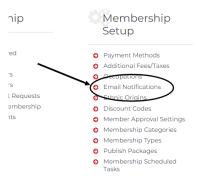
w HOME γ HELP ▲	MY ACCOUNT					+ LOGOUT
		Begi	n Selling			
Add New Men	nbership Package					← Back
	Package Details	Installm	ient Setup		Membership Types	
Name Description Season Featured Setting From Setting To	description - include any program dates	Installment Interval Type Months -	• to child particular the fee	+ 14U Youth Competitive Player + 16U Youth Competitive Player + 18U Youth Competitive Athlete + 12U Youth Competitive Player + Level 2 (Provincial) Referee		Player Player (+ Coach Iembership - Level 3 (Regional) Referee ee
Туре	Union Proc	. /	o(s) in Package netwided in this package Club Depose	Initial Payment	Fees	User Pays Outstanding
Type Youth Recreational Player	Union Price 13.13	Club Price 500	Club Depos	Initial Payment 113.13	4.12	113.13 400
		Save			Delete	

- You will see above then union fees are already in place and not counted on the DD.
- The club adds their own fee (500 in this case) and I have listed the club deposit as 100 meaning there is a total of 400 to be paid split into 4.

Please note The club deposit paid is not included on the number of instalments configured. Ie: The 400 left to pay is covered over the 4 months of DD

<u>Step 5</u> – Configure notifications

From the home page click on Email Notifications under Membership Setup.



Make sure to set season.

mber Registration	Transfers	Email Settings		
	/	•		
ember Registratio	n			
sons : ~				

Here under Recurring Payment Received you may configure an email to be sent each time a recurring payment is successfully processed.

Member Registration	Transfers	Email Settings			
Aentber Registratio	n				
Geasons :	Recurring Pay	ment Received	Recurring Payment Failed	Member Notification	

Under Recurring Payment Failed you may configure an email when a payment fails – it **is highly recommended** to setup this email as the system will not manage what happens to a member when a payment fails

Member Registration	Transfers	Email Settings			
Member Registratio	n			/	
Seasons : 🗸 🗸 🗸					
Club Notification	Recurring Pay	ment Received	Recurring Payment Failed	Member Notification	
Status :	Fnable	v b			