



SLSA Price List User Guide v2

Creating a Price List in Surfguard

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Contents

SLSA Price List Integration – Surfguard/Renewals/Join	3
Enforced Credit Card Payment.....	3
Surfguard Price List.....	4
Creating the Price List.....	5
Using Option 1 – Using Sub-Membership Categories Used by your Club	6
Using Option 2 – Create a Simple Price List Using Other.....	8
Using Option 3 – Use a combination of both sub-membership categories & Other.....	9

SLSA Price List Integration – Surfguard/Renewals/Join

The purpose of the document is to assist clubs to prepare their Price List in Surfguard that will then be used by existing members in the Members Area to renew their membership and new members joining a club via <https://join.sls.com.au>. The price list will work for both individual and family groups.

Key Points to Remember

- Clubs **MUST** have a price list created in Surfguard for members to Renew & Join
- Initially the price list will only be available at a club level.
- The age restrictions for each SLSA sub-membership category are used when calculating joining fees that will display to new members joining via <https://join.sls.com.au>.

Sub-Membership Category	Minimum Age	Maximum Age
Probationary	5	
Junior Activity Member (5-13 years)	5	13
Cadet Member (13-15 years)	13	15
Active (15-18 yrs)	15	18
Active (18yrs and over)	18	
Award Member	13	
Reserve Active	20	
Long Service	20	
Past Active	18	
Associate	5	
Life Member	5	
General Member	5	
Non-Member Participants	5	
Leave / Restricted	5	

Enforced Credit Card Payment

The default setup of the Price List in Surfguard is that all members joining, or renewing must make a payment by credit card at the time they submit. Clubs do have the ability to turn off the enforced credit card payment by unticking the box **Menu > Maintenance > Payment Methods**.

If clubs do turn off Enforce Credit Card Payments, it will provide members with all available payment options (which still could include Credit Card but also bank deposit and contacting the club). Clubs need to make sure they have their bank account details in Surfguard and have ticked the box for them to display **Menu > Bank Account Details > Edit**, make sure **Allow Direct Deposits** is ticked.

Update Payment Method @ Test SA Club

Payment Method

Enforce Credit Card Payment within Members Area/Join:

Update

Update Bank Account Details @ Test NSW Club

Bank Account Details

BSB Number: * [111] - [222]

Bank Account Number: * [12345678]

Bank Account Name: * [TEST]

Email Address: * [lthelp@slsa.asn.au]

Is Default Bank Account:

Allow Direct Deposits:

Online Payment Gateway

DDR Form Submitted: []

DDR Form Unsubscribe Date: N/A

Update Bank Account Details Cancel

Surfguard Price List

The new Price List page can be accessed in Surfguard by **Menu > Organisation Management > Price List**. The default display shows all club sub-membership categories in alphabetical order and an additional category called **Other**. For each of these categories there are 4 headings

1. Transaction Type - prices for all SLSA default Transaction Types can be selected
2. Price – Will display the amount for the specific item eg \$60.00
3. Status - Once prices are created the status will display either Enabled or Disabled
4. Action - the default is **Add Item**, once prices are added additional options will include **Update & Delete**

View Price List @ Coogee (NSW)

Price List

	Transaction Type	Price	Status	Action
Active (15-18 yrs)				Add Item
Active (18yrs and over)				Add Item
Associate				Add Item
Award Member				Add Item
Cadet Member (13-15 years)				Add Item

Price List

	Transaction Type	Price	Status	Action
Active (15-18 yrs)				Add Item
Gym Fee	Gym fee	\$60	Enabled	Update Delete
New Bronze Candidate 15-17yrs [?]	Joining Fee	\$250	Enabled	Update Delete
Locker Key Renewal	Locker key	\$20	Enabled	Update Delete
New Locker - Deposit [?]	Locker key	\$20	Enabled	Update Delete
Renewal Fee 2021/22 Season	Membership fee	\$30	Enabled	Update Delete

Creating the Price List

Clubs have a couple options when creating their price list

- Option 1 - Add prices to specific **sub-membership categories** used by your club
- Option 2 - Create a simple price list using **Other**
- Option 3 - Use a combination of both

Below is a table highlighting the advantages and disadvantages of each option

Option	Advantages	Disadvantages
Option 1 - Add prices to specific sub-membership categories used by your club	Renewing members will only see prices that are specific to their sub-membership category	Initial setup in SurfGuard is longer as the prices need to be added to each sub-membership category used at the club
	New members joining will only see prices for sub-membership categories that match their age.	No ability to have family group prices
• Option 2 - Create a simple price list using Other	Quick and easy to setup	Renewing & new members joining will see all price options for all types of membership and it will not be targeted to specific sub-membership categories based on their current sub-membership category (renewing members) or age (new members joining).
	Caters for family groups	
• Option 3 - Use a combination of both	Renewing members will only see prices that are specific to their sub-membership category	Initial setup in SurfGuard is longer as the prices need to be added to each sub-membership category used at the club and Other
	New members joining will only see prices for sub-membership categories that match their age.	
	Caters for family groups	

NOTE: Regardless of what Option you choose, as a minimum you should have two transaction types for each sub-membership category your club uses: -

- Joining fee - for brand new individual/families joining your club via <https://join.sls.com.au>
- Membership fee - for existing members renewing via <https://members.sls.com.au>

Using Option 1 – Using Sub-Membership Categories Used by your Club

1. Click Add Item and a new screen will display, compulsory fields are indicated by *

- A. **Header:** - indicates the sub-membership category price is added to
- B. **Price Item Name:** the name of each price item must be unique in each category. ie you can have a price item called Gym in multiple categories, but you can't have two price items called Gym in the same category.
- C. **Transaction Type:** select form the drop-down
- D. **Price (\$):** There is no need to add the dollar sign it will display as a default. For whole dollar amounts you only need to type the amount eg. If the membership fee is \$55.00 you only need to type 55
- E. **Description:** (Optional) Any description entered will show as a ? pop-up when you display the price list. This is how member will be able to read more information about the item.
- F. **Status:** the default option is Enabled, and the second option is Disabled. You may choose to use this if you have a fee for a certain period, eg Early Bird Payment. You can then disable it once the Early Bird has finished.
- G. **Click Add or Cancel:** Click Add to save the price item and Cancel to delete the item. Once you click Add a confirmation screen will confirm that the pricing item is successfully added.

Sample Price Lists

In the price list below: -

- Several items have been added to the Active (15-18 yrs) sub-membership category.
- All entries are sorted alphabetically by Transaction Type and then by Price List Item Name
- A description has been added to the Hi-Vis Vest item as indicated by the ? Hover over the question mark icon to view the description.
- The "Late Membership Renewal Fee 2021-22 Season" is currently Disabled.

Price List				
	Transaction Type	Price	Status	Action
Active (15-18 yrs)				Add Item
Gym Fee	Gym fee	\$30	Enabled	Update Delete
New Member	Joining Fee	\$100	Enabled	Update Delete
Late Membership Renewal Fee 2021-22 Season	Membership fee	\$75	Disabled	Update Delete
Membership Renewal Fee 2021-22 Season	Membership fee	\$55	Enabled	Update Delete
Club Cap	Merchandise	\$15	Enabled	Update Delete
Hi-Vis Vest [?]	Merchandise	\$10	Enabled	Update Delete

Price List

	Transaction Type	Price	Status	Action
Active (15-18 yrs) Add Item				
Fob Replacement	Club key	\$20	Enabled	Update Delete
Gym Fee	Gym fee	\$60	Enabled	Update Delete
New Bronze Candidate 15-17yrs [?]	Joining Fee	\$250	Enabled	Update Delete
Locker Key Renewal	Locker key	\$20	Enabled	Update Delete
New Locker - Deposit [?]	Locker key	\$20	Enabled	Update Delete
Renewal Fee 2021/22 Season	Membership fee	\$30	Enabled	Update Delete
Active (18yrs and over) Add Item				
Fob Replacement	Club key	\$20	Enabled	Update Delete
Gym Fee	Gym fee	\$60	Enabled	Update Delete
New Bronze Candidate 18-21yrs [?]	Joining Fee	\$250	Enabled	Update Delete
New Bronze Candidate 22yrs+ [?]	Joining Fee	\$350	Enabled	Update Delete
Locker Key Renewal	Locker key	\$20	Enabled	Update Delete
New Locker - Deposit [?]	Locker key	\$20	Enabled	Update Delete
Renewal Fee 2021-22 Season	Membership fee	\$55	Enabled	Update Delete
Associate Add Item				
Fob Replacement	Club key	\$20	Enabled	Update Delete
Gym Fee	Gym fee	\$220	Enabled	Update Delete
Joining Fee	Joining Fee	\$230	Enabled	Update Delete
Renewal Fee 2021-22 Season	Membership fee	\$220	Enabled	Update Delete
General Add Item				
1st Nipper Parent/Carer - Compulsory	Joining Fee	\$20	Enabled	Update Delete
2nd Nipper Parent/Carer - Optional	Joining Fee	\$20	Enabled	Update Delete
Nipper Parent/Carer - Compulsory [?]	Membership fee	\$20	Enabled	Update Delete
Nipper Parent/Carer - Optional	Membership fee	\$20	Enabled	Update Delete
Nipper Parent/Carer - Senior Club Member [?]	Membership fee	\$0	Enabled	Update Delete
Junior Activity Member (5-13 years) Add Item				
New Nipper Joining 1st Child	Joining Fee	\$125	Enabled	Update Delete
New Nipper Joining 2nd Child	Joining Fee	\$105	Enabled	Update Delete
New Nipper Joining 3rd or More Child	Joining Fee	\$85	Enabled	Update Delete
Renewal Fee 1st Child	Membership fee	\$125	Enabled	Update Delete
Renewal Fee 2nd Child	Membership fee	\$105	Enabled	Update Delete
Renewal Fee 3rd or More Child	Membership fee	\$85	Enabled	Update Delete
Nipper Cap	Merchandise	\$10	Enabled	Update Delete

Using Option 2 – Create a Simple Price List Using Other

For very simple price lists and for club’s price lists that include Family Groups you can use the **Other** category

- 1 Scroll down to the bottom of the Price List categories to **Other** and Click **Add Item**
- 2 If you select a Transaction Type of Membership Fee or Joining Fee from the drop-down then an additional field will display called **Related to Family Group**.
- 3 Tick the box if the Price Item does relate to a family group and leave blank if it doesn’t.

Add price item to Other

Price Item Name: *

Transaction Type: *

Related to Family Group:

Price (\$): *

Description:

Status: *

Sample Price List

Other				Add Item
Gym Fee	Gym fee	\$20	Enabled	Update Delete
Additional Nipper	Joining Fee	\$70	Enabled	Update Delete
Family Group - Up to 2 Adults & 2 Children	Joining Fee	\$200	Enabled	Update Delete
Senior Membership Fee	Joining Fee	\$55	Enabled	Update Delete
Additional Nipper	Membership fee	\$70	Enabled	Update Delete
Family Group - Up to 2 Adults & 2 Children	Membership fee	\$200	Enabled	Update Delete
Senior Membership Fee	Membership fee	\$55	Enabled	Update Delete

Using Option 3 – Use a combination of both sub-membership categories & Other

Sample Price List

Junior Activity Member (5-13 years)				Add Item
New Nipper Joining	Joining Fee	\$140	Enabled	Update Delete
Renewal Fee 2021/22 Season	Membership fee	\$140	Enabled	Update Delete
Nipper Cap	Merchandise	\$10	Enabled	Update Delete
Life Member				Add Item
Gym Fee	Gym fee	\$0	Enabled	Update Delete
Membership Fee	Membership fee	\$0	Enabled	Update Delete
Long Service				Add Item
Gym Fee	Gym fee	\$90	Enabled	Update Delete
Locker Key Renewal	Locker key	\$30	Enabled	Update Delete
New Locker - Deposit [?]	Locker key	\$20	Enabled	Update Delete
Renewal Fee 2021-22 Season	Membership fee	\$70	Enabled	Update Delete
Reserve Active				Add Item
Gym Fee	Gym fee	\$90	Enabled	Update Delete
Locker Key Renewal	Locker key	\$20	Enabled	Update Delete
New Locker - Deposit [?]	Locker key	\$20	Enabled	Update Delete
Membership Fee	Membership fee	\$70	Enabled	Update Delete
Other				Add Item
Fob Replacement	Club key	\$20	Enabled	Update Delete
Family Group- Up to 2 Adults & 3 Children	Joining Fee	\$100	Enabled	Update Delete
50 Year Member	Membership fee	\$0	Enabled	Update Delete
Family Group- Up to 2 Adults & 3 Children	Membership fee	\$100	Enabled	Update Delete
Perpetual Member [?]	Membership fee	\$0	Enabled	Update Delete
Swimming Costume - Female	Merchandise	\$80	Enabled	Update Delete
Swimming Costume - Male [?]	Merchandise	\$40	Enabled	Update Delete