SLSA Price List User Guide v4

Integrated Price List – Surfguard, Members Area & Join

February 2022

Contents

SLSA Price List Integration – Surfguard/Renewals/Join

NOTE: All clubs must have a price list in Surfguard for their members to Renew or Join online.

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.
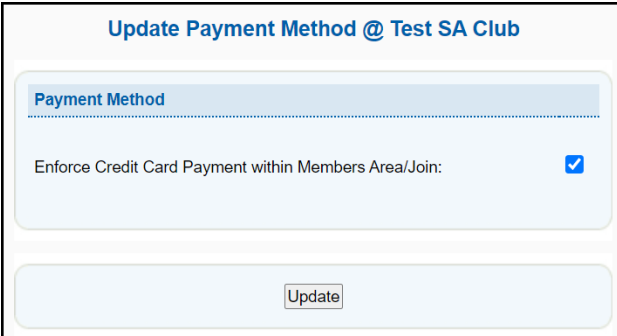
Key Points to Remember

- Initially the prices 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	
Honorary	5	

Enforced Credit Card Payment

The 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.
Menu > Maintenance > Payment Methods.
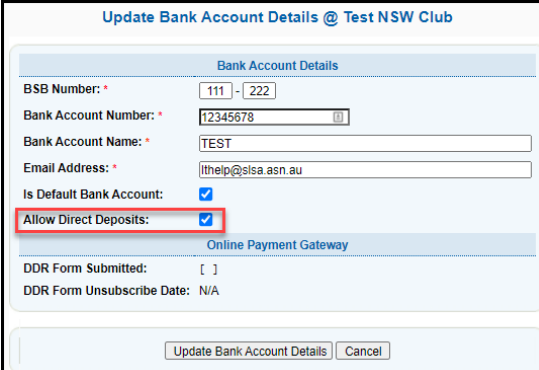
Update Payment Method @ Test SA Club

Payment Method

Enforce Credit Card Payment within Members Area/Join: ☑

Update

If clubs do turn off Enforce Credit Card Payments, then they need to make sure they have their bank account details in Surfguard and have ticked the box for them to display.
Menu > Organisational Management > Bank Account Details > Edit, make sure **Allow Direct Deposits** is ticked.

Update Bank Account Details @ Test NSW Club

Bank Account Details

BSB Number: * 111 - 222
Bank Account Number: * 12345678
Bank Account Name: * TEST
Email Address: * ithelp@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 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 multiple prices to choose from
	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	

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

	Transaction Type	Price	Status	Action
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

	Transaction Type	Price	Status	Action
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

	Transaction Type	Price	Status	Action
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

	Transaction Type	Price	Status	Action
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

	Transaction Type	Price	Status	Action
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: *	2 Adults & 2 Children Family Gr
Transaction Type: *	Membership fee ⌄
Related to Family Group:	☑
Price ($): *	150.00
Description:	This membership fee is for a maximum of 2 adults and 3 children. All children must be under 18 years.
Status: *	Enabled ⌄

Add   Cancel

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

New Individual Member Joining via https://join.sls.com.au

1. Select club to join
2. Enter member/s details – First & Last Name, DOB, Gender
3. Enter contact details – Email, Mobile, Address & Emergency Contact details

The system will calculate the members current age and only show Joining Fees for the sub-membership categories they are eligible to be in.

Once the selection has been made any additional description to the Price will be displayed below

The member will then be given the option to purchase any other items that the club has entered. In this example items will only show if they were added to the Active (18yrs and over) category or Other.   Examples, club merchandise, gym fees, Club Fob/Key

Summary page displays, including cost of all items purchased including any description added. When the member clicks Next at bottom right of screen, the pending request will be created in Surfguard.

Summary

You are joining

Clovelly SLSC (NSW)

Member/s to join

Billy Blue   01/02/1997   Male

Contact Details	**Emergency Contact**
10 Beach Street	Harry Potter (Friend)
Clovelly 2031 NSW	10 Beach Street
Australia	Clovelly 2031 NSW
billyblue@gmail.com	Australia
0429333666	0413333666

Order Summary

Please find below a summary of your order.

Billy Blue

Active (18yrs and over) - New Bronze Candidate 21yrs and above	$350.00
Includes Joining, Membership and Training Fee, Club cap, Hi Vis Vest and Training Manual	
Active (18yrs and over) - Gym Access Fee	$60.00
Other - Mens Swimming Costume	$45.00
Available in Briefs & Jammers	

Total

	$455.00

Create a Members Area Account

To keep track of your membership application, an account will be created for you in our Members Area. Use this account to manage your membership once you become a member. An email will be sent to you asking you to activate your account:

Preferred Username	**Password**
billyblue	••••••••

SLSA Membership application and declaration

☑ **I have read, understood, acknowledge and agree** to the declaration including the warning, exclusion of liability, release and indermnity. I acknowledge that if my application for membership is successful I will be entitled to all benefits, advantages, privileges and services of SLSA membership.

☑ I have read, understand, acknowledge and agree to the declaration and application and conditions of membership. I warrant that all information provided is correct.

Previous   Next

Payment Options

The next screen to display will depend on the following

1. Does the member still owe money?

2. Forms of payment accepted by the club.

a) No Money Owed

b) Club Enforces Credit Card Payment

If the club enforces Credit Card payment and the customer owes money, they will see the next screen and proceed to pay via the Payment Gateway

c) Club Does Not Enforce Credit Card Payment and Offers Multiple Payment Options

If the club DOES NOT enforce Credit Card payment and the customer owes money, they will see the next screen to pay via Payment Gateway (if the club is signed up for Payment Gateway) or via Direct Deposit to the club

In this example there are two options for members to pay the club, via Credit Card or Direct Deposit

PAYMENT

Use the button below to pay now using your credit card.

PAY ONLINE

By **direct debit** - this organisation will accept payment by direct debit from your own internet banking account using the details shown here.

Bank Details - Clovelly SLSC

BSB Number
633000

Account Number
124880071

Account Name
Clovelly Surf Life Saving Club

If you pay by **direct debit, p**lease ensure meaningful information including your name is entered in the payment details field. You may also want to email your club a copy of the transaction receipt for their records

Clovelly SLSC

Phone Number(s)
0413457035
02 9665 1441

Email Address
admin@clovellysurfclub.com.au

If the member pays via the Payment Gateway details of the order will autofill in Transaction 1 of the Payment Gateway screen

Transaction 1

★ Transaction Type	Joining Fee ▼	
★ Payment Details	Order Number 35 for Billy Blue	Complete Name/Meaningful Payment details
★ Amount	455.00	GST Inc. ($dd.cc)

The new member will receive an email confirming the details of their new membership

[External] Your membership application and payment to Clovelly SLSC

N noreply@qamembers.sls.com.au
To ○ billyblue@gmail.com; ○ admin@clovellysurfclub.com.au; ○ SLSA IT Support

Hi Billy Blue,

Thank you for submitting your application for membership to Clovelly SLSC

The application needs to be approved before you become a member and you must fulfill all of the Terms and Conditions of the membership process required by SLSA and the Club.

You can view the status of your membership application by logging in to SLS Members Area

Further email notifications will be sent once your application has been updated/processed.

Order Summary (#35)

Please find below a summary of your order. Your order number is #35

Billy Blue
Active (18yrs and over) - New Bronze Candidate 21yrs and above $350.00	
Active (18yrs and over) - Gym Access Fee	$60.00
Other - Mens Swimming Costume	$45.00
Total	**$455.00**

Please Make Payment if you have not already done so.

Regards,
SLSA

Family Group Joining https://join.sls.com.au

This is the clubs current Price List in Surfguard

Other				Add Item
Family of 4 [?]	Joining Fee	$230	Enabled	Update | Delete
General Adult Joining Fee	Joining Fee	$100	Enabled	Update | Delete
General Child joining Fee	Joining Fee	$30	Enabled	Update | Delete
Family of 4 [?]	Membership fee	$230	Enabled	Update | Delete
General Adult Renewal	Membership fee	$100	Enabled	Update | Delete
General Child Renewal	Membership fee	$30	Enabled	Update | Delete

Once they have added the family details the following screen will display. If the Primary member selects the **$230.00 – Other – Family of 4** The option in the drop down for the other members will displays with the following options of $0.00.

The club didn't add any additional prices, so the next screen displays like this

Family Group Renewing https://members.sls.com.au

If additional payment options have been added to the Price List in Surfguard they will then display for the member to select. They can be sub-membership category specific or added in Other if they apply to all categories.

Active Kids Vouchers– NSW ONLY

The details of Active Kids vouchers can be entered for any child <18yrs in NSW. If a family has no vouchers to use, they scroll to the bottom and click Next.

As this family has joined a club in NSW and Active Kids vouchers have been used the value of the membership has been deducted for each child.

JOIN

Summary

You are joining

Coogee SLSC (NSW) (NSW)

Member/s to join

Rose Bright	10/10/1980	Female
Daisy Bright	02/02/2012	Female
Lily Bright	03/03/2013	Female

Contact Details	**Emergency Contact**
10 Brighton Street	Barry Bright (Wife)
Botany 2019 NSW	10 Brighton Street
Australia	Botany 2019 NSW
bright@gmail.com	Australia
0411222333	0422444666

Order Summary

Please find below a summary of your order.

Rose Bright

General - 1st Nipper Parent/Guardian - Compulsory	$30.00

Daisy Bright

Junior Activity Member (5-13 years) - New Nipper Joining - 1st Child *(Original fee of $125.00 - $100 active kids voucher)*	$25.00
Junior Activity Member (5-13 years) - Nipper Cap	$15.00

Lily Bright

Junior Activity Member (5-13 years) - New Nipper Joining 2nd Child *(Original fee of $105.00 - $100 active kids voucher)*	$5.00
Junior Activity Member (5-13 years) - Nipper Cap	$15.00

Total

	$90.00

Create a Members Area Account

To keep track of your membership application, an account will be created for you in our Members Area. Use this account to manage your membership once you become a member. An email will be sent to you asking you to activate your account:

Preferred Username	**Password**
rosebright	••••••••

SLSA Membership application and declaration

☑ **I have read, understood, acknowledge and agree** to the declaration including the warning, exclusion of liability, release and indemnity. I acknowledge that if my application for membership is successful I will be entitled to all benefits, advantages, privileges and services of SLSA membership.

I, [Rose] [Bright] am **the parent or guardian** of the applicant.

☑ I authorise and consent to the applicant undertaking the SLS Activities. In consideration of the applicant's membership being accepted I expressly agree to be responsible for the applicant's behaviour and agree to personally accept in my capacity as a parent or guardian the terms set out in this membership application and declaration including the provision by me of a release and indemnity in the terms set out above. In addition I agree to be bound by and to comply with the SLSA constitution and any regulations and policies made under it.

☑ I have read, understand, acknowledge and agree to the declaration and application and conditions of membership. I warrant that all information provided is correct.

[Previous]   [Next]

Email Notifications & Viewing Orders

New Member/s Joining Email Notification

Once a new member application is submitted via Join an email is sent to the email address in Organisational Details in Surfguard and the following Club Officers including the details of the order.

- Administration
- Paid Administration 1
- Finance

Payment Gateway Email Notifications

Club officers who have been added to the email notifications for payments made by the Payment Gateway will continue to receive payment notification emails.

Viewing Orders via Reports in Members Area

Orders can be viewed in the **Members Area > Reports > Orders**

To be able to view Orders you must be in the following Officer Positions in Surfguard.

- Administration
- Paid Administration 1
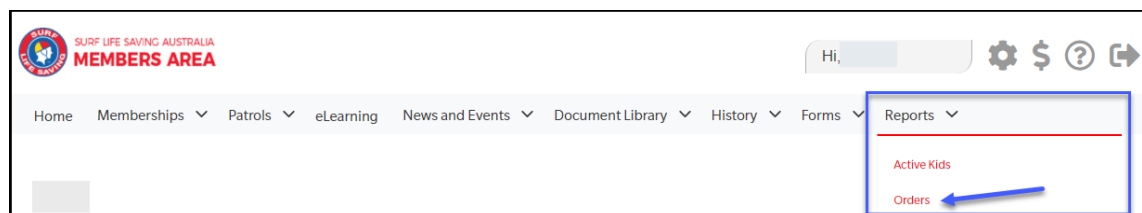
Club officers can search by Order Number, Member Name & Date Range. To view the order, click the view icon in the Action column

Full details of the order display

ORDER SUMMARY (#19)

Sally Price

Your order number is **#19** and was placed to **Clovelly**.
Please find below a summary of your order.

Sally Price	
Active (18yrs and over) - Renewal Fee 2021-22 Season	$55.00
Charlie Price	
Junior Activity Member (5-13 years) - Renewal Fee 2021/22 Season	$140.00
Molly Price	
Cadet Member (13-15 years) - Renewal Fee 2021/22 Season	$30.00
Total	**$225.00**

Frequently Asked Questions (FAQ's)

Do I have to add prices to the Surfguard Price list now?

Yes, if your club uses online renewals and online joining. As a minimum clubs must have Membership (Renewing members) & Joining (new members joining) fees in Surfguard for any sub-membership category that is used by their club or in the Other section. If there are no prices entered, existing members will not be able to renew their membership via https://members.sls.com.au and new members will not be able to join via https://join.sls.com.au

Renewing members

New Member/s Joining

How do members pay for items that are not part of a Renewal or Join?

1. Club using Online Joining & Renewals and registered for SLSA Payment Gateway

We recommend clubs who use the Price List feature on the Payment Gateway should update their Payment Gateway price list to only include the cost of additional items eg merchandise, carnival entry fees, fob & locker fees, board storage fees etc.   They do not need to have any Renewal or Joining fees on the price list as these will be entered in the Price List in Surfguard.

Members can then pay for additional items by:-

1. Logging in to their Members Area account and clicking the **$** at top right of screen to take them to the Payment Gateway to pay additional fees

2. The club can direct members to **pay.slsa.com.au** and they will be redirected to the Payment Gateway.

2. Club using Online Joining & Renewals and NOT registered for SLSA Payment Gateway

In Surfguard Clubs need to go to Menu > Maintenance > Payment Methods and **untick** "Enforce Credit Card Payments".

They should also go to Menu > Organisational Management > Bank Account Details and do the following: -
1. Make sure their bank account details are up to date.
2. Click **Edit** and tick "Allow Direct Deposits".
3. Make sure members prices and payment methods are listed on their website

3. Club NOT using Online Joining & Renewals (members submit paper forms) registered for SLSA Payment Gateway

Your club will not have to create a Price List in Surfguard and will need to ensure the Payment Gateway Price List has all prices listed for Renewing, Joining and additional fees such as merchandise, carnival entry fees, fob & locker fees, board storage fees etc.

Members can then pay for additional items by:-

1. Logging in to their Members Area account and clicking the **$** at top right of screen to take them to the Payment Gateway to pay additional fees

2. The club can direct member to **pay.slsa.com.au** and they will be redirected to the Payment Gateway.