

Migrating club membership to ClubEvent

ClubEvent incorporates the management of member subscriptions, with the following features:

- Multiple membership plans
 - Yearly, Quarterly, Monthly or custom membership period
 - Choice of start dates, or start plan from when member joins
 - Automatically pro-rate any time until the next membership period
 - Payment reminders
 - Auto expire members
 - Linked 'Parent' and 'Child' accounts
- Customisable membership form
- Custom templates for welcome and renewal messages
- Payment by credit card or instruct members how to pay otherwise (e.g. bank transfer)
- Manage payments
 - List overdue payments, send reminders, mark as paid
 - List scheduled payments
- Export and import members from spreadsheet
- Create mailing list based on member groups (tags)

This document describes the process of migrating an existing user list to ClubEvent.

Set-up process

Importing your users will be the *last* step in this process. If you follow the steps below, you should end up with a beautiful new membership system.





1. **ClubEvent plan:** Check which plan you will need: www.clubevent.co.uk/plans-and-pricing
2. **Stripe set-up:** In order to take payments, you will need to set-up a Stripe connection, which is done by the Club owner account: <https://plans.clubevent.co.uk>
3. **Club settings:** Go through the club settings and check all is as you require, and *enable membership functions*
4. **Configure Contact tags & groups:** Consider what groups you would like your members to be in, and create tags and email lists to match those groups
5. **Membership plans:** Set-up your membership plans. See below
6. **Membership form:** Set-up your membership form. See below
7. **Membership settings:** Set-up your membership email, welcome messages and payment options
8. **Test your membership form:** Use the membership form to create a member to test the membership process. This is vital for the next step
9. **Export your existing contacts:** Exporting your contacts, including the new member that you created will give you the basis for your import spreadsheet
10. **Import spreadsheet:** Prepare an import spreadsheet, and import member details!
11. **Publish your join link!**

Configure Contact tags & groups

Contact tags can be used to group contacts and/or members. The groupings allow you to send messages to just those people, or restrict event entry to certain people. It is also used as the basis of the clubevent distribution lists. Both are configured from the **Tags & Groups** menu.

CONTACT TAGS

You can apply tags to contacts which essentially puts them into groups such as "junior", "volunteers". You can then invite tag groups to events, or send message to just those contacts.

Tag name	Colour
coach	 
committee	 
team	 

EMAIL LISTS

Create email lists from the tag groups above.

Email lists

Click & Swipe left and right to edit or delete

coaching.kfa8@clubevent.email
Replies go to group, group can send, recipients are: "coach"

Shown here is a club with three contact tags set-up, and a single mailing list - the free version of ClubEvent only allows a single mailing list.

Edit Group

CANCEL SAVE

coaching.kfa8@clubevent.email

Group prefix *
coaching

Prefix for the mailing list

Senders
Anyone in group can send

Choose who can send to the group

Replies
To group

Choose where replies to a group message will go

Recipients
x coaching x

Choose the tag groups that are group recipients

Description

Email groups can be set-up to control who can send, and where the replies go to:

- Senders: Choose between
 - *Anyone in the group can send*; anyone that is on the recipient list can send to the group
 - *Only nominated senders*; define (using a tag) who can send to the group
 - *Public can send*; anyone can send to the group

- Replies: Choose between:
 - *To group*; replies will go back to all group recipients
 - *To sender*; replies will only go to the sender of the message
 - *To specific address*; replies will go back to an address of your choice
- Recipients: Choose the tag groups that will form the recipients of the message.
Note that there are some *special* tag groups built in.

Built in tag groups

There are some built in tag groups that you can use:

- (all): All contacts on the system
- (admins): All administrators
- (contacts): Only contacts (i.e. not followers or members)
- (followers): Followers of the club - those that use the app, but aren't members
- (members): Current Members of the club
- [plan:xxx]: Members on plan 'xxx'

Sending messages

Once you have set-up some mailing lists, you can test sending to them from your email client. Clearly these can be used to send attachments to users, whereas attachments are not supported when sending using the ClubEvent app.

Membership plans

Plans are set-up from the **Memberships** menu. Please remember to press *Save* on this page after changes have been made!

Plans should be created before you edit your membership form as it is possible to create form fields that only appear when certain plans are chosen. If you create a plan after the form has been in use, then be sure to update all fields to include the new plan!

PLANS

Membership plans	
Click & Swipe left and right to edit or delete	
Adult <i>Adult membership (over 20)</i>	GBP 100
Junior/Student <i>Junior membership (under 21)</i>	GBP 50
Honorary (hidden) <i>Honorary Member</i>	GBP 0

Here is an example of a membership plan:

Edit membership plan

CANCEL

SAVE

Membership name *

Adult

Period

Yearly

Time period for the plan

Period Start

January

Start date for the plan

Price (GBP)

£100.00

Price for each period

Initial price

Pro-rated until period start

Payment until start of first period

Remind in advance

Four weeks

Send a reminder before payment is due to allow early payment

Membership Starts

On Payment

When membership starts

Linked Members

Choose if any linked members can be part of this plan

Expired period

3

Enter the period (in months) for expired members to be kept

Hide plan

☐

Hide this membership plan

Welcome message

Door codes

The current door codes are: Padlock; 5705, Inner door; C2605Z

Welcome message specific to this plan

Plan notes

Adult membership (over 20)

Notes about this plan

The settings are as follows:

- Period: Choose between Yearly, Quarterly, Monthly & Custom; which lets you define the number of months that a plan will last
- Period Start: This varies depending on which option you choose for period, and will let you define when the period starts.
 - Yearly: You can choose which month the plan starts from
 - Quarterly: You can choose between January (Jan-Mar, Apr-Jun, Jul-Sep, Oct-Dec) or February (Feb-Apr, May-Jul, Aug-Oct, Nov-Jan) or March (Mar-May, Jun-Aug, Sep-Nov, Dec-Feb)
 - Monthly: You can choose between the 1st, 7th, 14th, 21st or last day of the month
 - Custom: Lets you specify how many months the membership period will run

for, and the start month

- Price: Set the price for the plan period
- Initial price: Choose between 'pro-rated' which will allow the system to calculate how much time is left between now and the start of the next period and charge the member the correct portion of the membership price, and 'free' - which will not charge the user (allowing the club to handle this as they wish). Note that if set to pro-rated, an admin still has a choice about how much to charge a user when they accept their membership
- Remind in advance: Set the reminder period for the renewals
- Membership starts: Choose whether membership starts when the member is 'Approved' or after they have paid the initial payment (if there is one)
- Linked members: Define how many linked members are available on this plan; i.e. should you wish to have a 'couples' or a 'parent & child' plan that offers a discount, this option enables that. See note below.
- Expired period: How long to keep unpaid members as members, before they are converted back to 'followers'
- Hide plan: Hides the plan from the membership form. Hidden plans can be chosen by administrators when editing contact records.
- Welcome message: Some text that can be inserted into the welcome message which is specific to this plan, using the [planwelcome] tag
- Notes: A description of the membership plan for admin use only

Note on linked members:

Linked members do not need their own email address, in which case all correspondence will need to be directed to the parent member. This would however means that linked members cannot use their own email address to book into events that have been restricted to a particular tag group (which includes the parent record), so ideally they should have an email address that is different from that of the parent record.

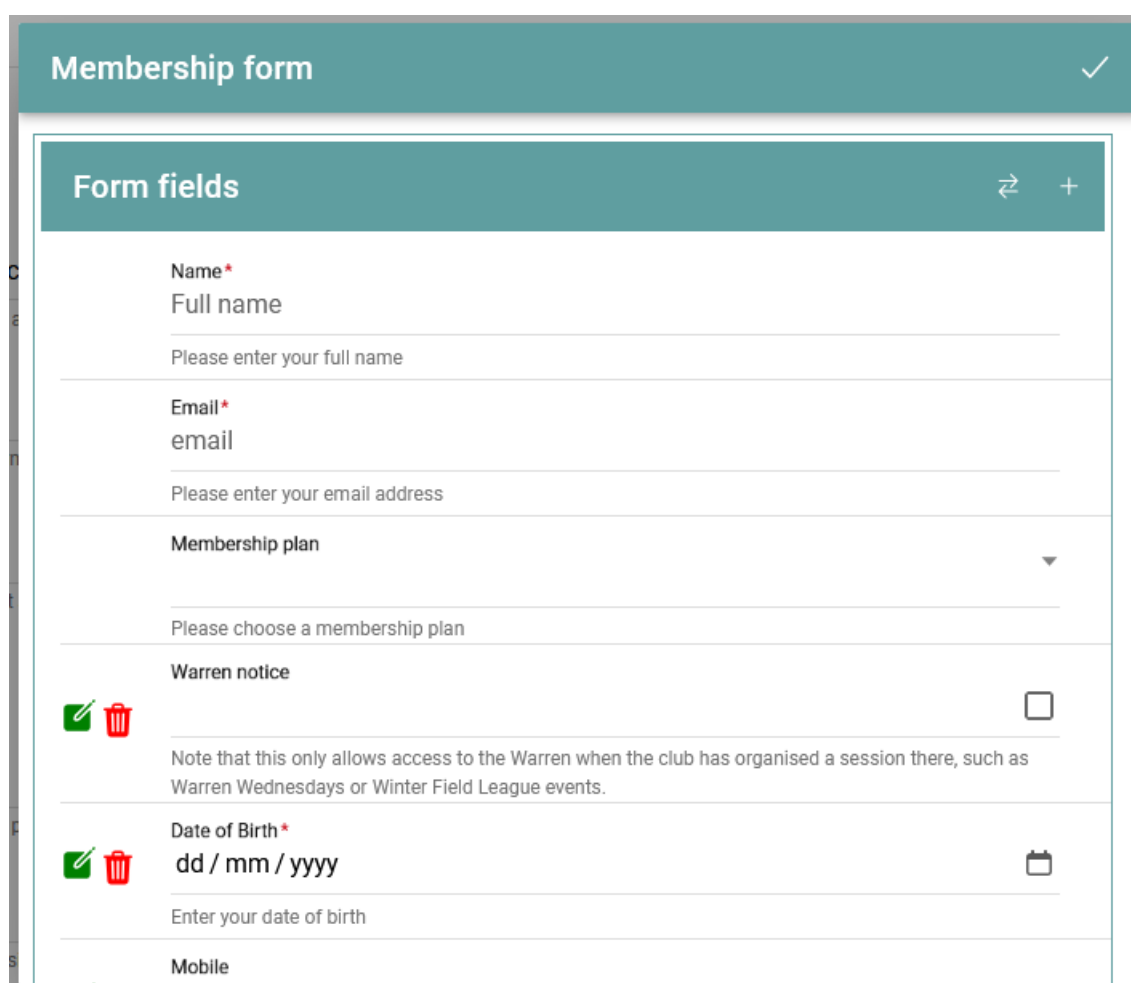
Membership form

The membership form allows you to collect membership details. There are three fixed fields on the form: Name, Email, Membership plan. These are required and cannot be changed or re-positioned on the form. Other fields can be edited or deleted.

The (+) button at the top of the form allows for the addition of a new field

The other button turns on 'drag and drop' mode which allows you to click on the (=) buttons next to each field and move the field up and down the form, which puts them in the order that a user will see them.

It is a good idea to plan your form before starting to create it, and give some thought to the information that you **really** need from a member, considering data privacy laws. For instance, many clubs collect people's addresses - but never ever use this information. If you have sufficient contact information (email, mobile) then you can quite happily ask the user for their address should you ever need it. It is always better to keep minimal private data.



The screenshot shows a web interface for building a membership form. At the top is a teal header bar with the text "Membership form" and a checkmark icon. Below this is a white box with a teal header bar containing the text "Form fields" and two icons: a double-headed arrow and a plus sign. The form fields are listed below:

- Name***
Full name
Please enter your full name
- Email***
email
Please enter your email address
- Membership plan**
Please choose a membership plan
- Warren notice**
Note that this only allows access to the Warren when the club has organised a session there, such as Warren Wednesdays or Winter Field League events.
- Date of Birth***
dd / mm / yyyy
Enter your date of birth
- Mobile**

Each field has a green checkmark icon and a red trash can icon to its left, and a calendar icon to its right.

A form field:

Add field

CANCEL

SAVE

Field name*

Field label*

Type

Placeholder

This is a placeholder!

Text that shows grey in the field when there is no value in it, as you can see above!

Description

This is a placeholder!

Text that appears under the field to help explain it

Help popup

Popup that appears when the (?) button is pressed

FIELD OPTIONS

Required

☐

Check if the user MUST fill in this field

Validate

validation regex

You can enter a regular expression to ensure data is entered in a certain format, see www.clubevent.co.uk/faqs

Initial value

Set the initial value of the field

FIELD USAGE

Applies to

Adult, Junior/Student, Honorary, Affiliated, Warren Only, Parent & Child, Pare...

Select which plan this field will be used by

Adding a field requires you to enter a few details, as follows:

- **Name:** Choose a name for the field, this will not be seen, but will be used in import/export spreadsheets. Made the name short, but meaningful
- **Field label:** What the user will see 'Field label' on this screen shows how it will look!
- **Type:** Choose the type of the field:
 - **text:** a simple text field
 - **number:** a number
 - **email:** an email address
 - **dateofbirth:** a date

- **dropdown:** A drop down list of options. Once selected, another field will appear where you can enter a comma separated list of options
- **checkbox:** a tick box
- **note:** a text area, for a larger amount of text
- **label:** text that cannot be changed, to perhaps explain part of the form
- **Placeholder:** Enter text that will appear in the field, greyed out (as demonstrated by 'This is a placeholder'). Note that this is not a *value*, but a hint to the user
- **Description:** Enter text that will appear under the field, to explain it.
- **Help popup:** If there is not enough space to describe the field in description, then you can add more details here that can be accessed by the user by pressing the help button
- **Required:** Check this if the user MUST complete this field, i.e. they cannot complete the membership form unless the field is completed
- **Validate:** Certain fields allow you to add a validation regex. If you don't know what a regex is, then don't worry about this field :-)
- **Initial value:** You can enter an initial value for the field, that the user can then change. If the field is a checkbox, you could set it to be checked, and then validate only when they clear the field, for example.
- **Field usage Applies to:** Select which plans that the field will be show for.

Membership setting

Other membership settings should be completed:

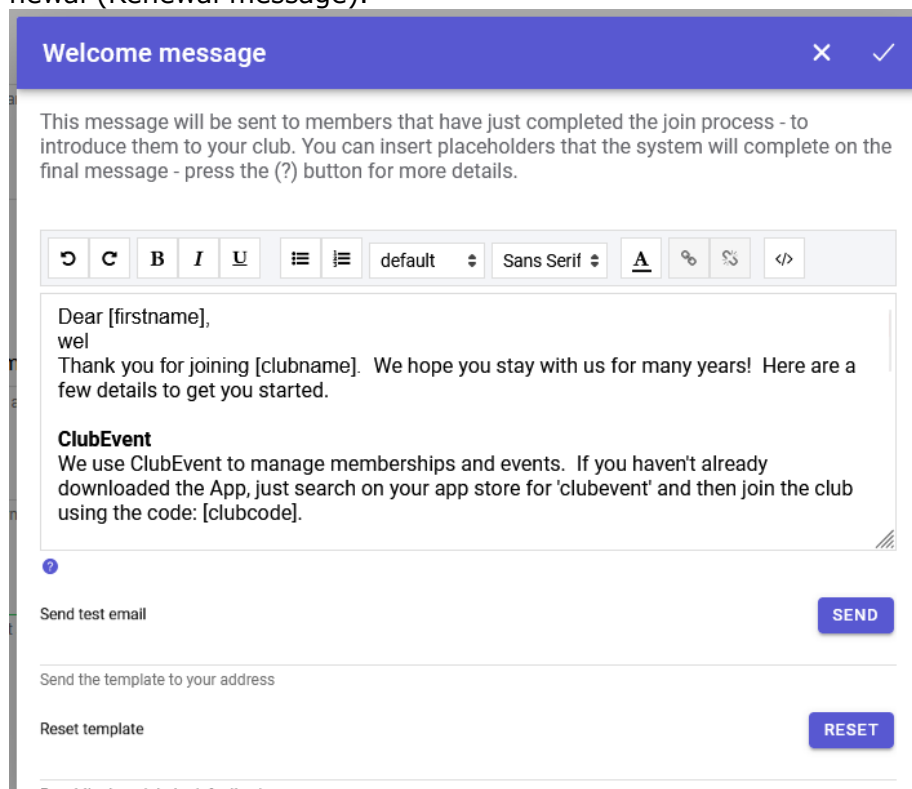
Payments

Enable payments for membership.

You can also enable 'offline' payments, which allows you to provide some information as to how to do this. Thus, when a user receives a payment reminder, it will offer them the choice between paying by credit card, and whatever you have configured in this box.

Message templates

The templates control what is sent to your users on joining (Welcome message) and on renewal (Renewal message).



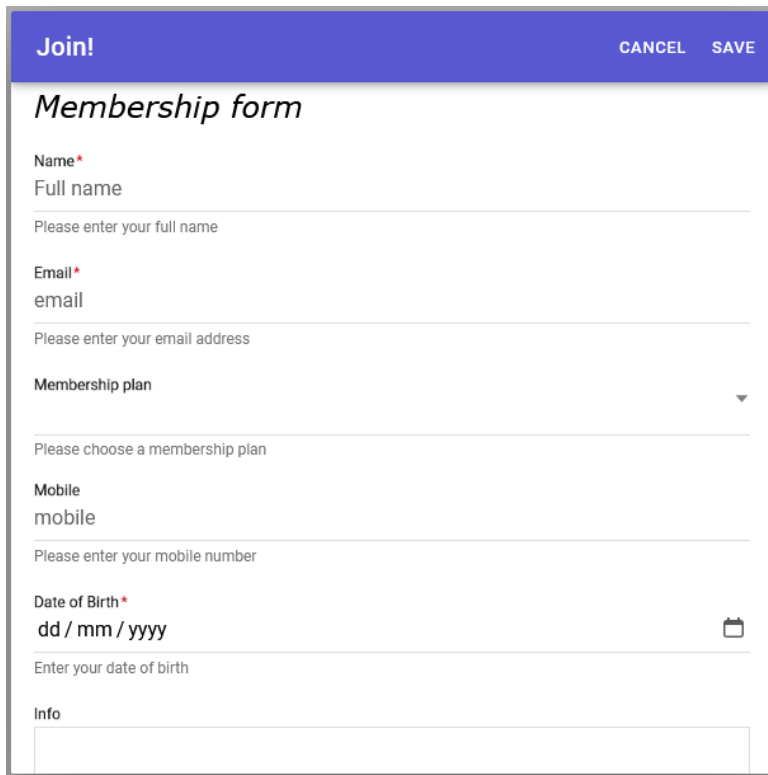
The screenshot shows a web interface for editing a 'Welcome message' template. At the top is a blue header with the title 'Welcome message' and close/confirm icons. Below the header is a text area containing instructions: 'This message will be sent to members that have just completed the join process - to introduce them to your club. You can insert placeholders that the system will complete on the final message - press the (?) button for more details.' Below this is a rich text editor toolbar with icons for bold, italic, underline, list, link, font color, background color, and code. The main text area contains a sample message: 'Dear [firstname], wel Thank you for joining [clubname]. We hope you stay with us for many years! Here are a few details to get you started. ClubEvent We use ClubEvent to manage memberships and events. If you haven't already downloaded the App, just search on your app store for 'clubevent' and then join the club using the code: [clubcode].' At the bottom, there are two buttons: 'SEND' and 'RESET'.

There are a few place holders that you can use in the message, which can be seen if you click the (?) button. You can also send a test email to yourself to see what the message looks like (note, you may have to save the membership settings and re-enter this form to ensure that the ClubEvent server has the latest copy of the template).

The reset button will reset the template to the system default.

Test your membership form

In order to test your membership form, in a browser goto the link:
<https://app.clubevent.co.uk/join?club=<code>>
where the <code> is your club code.



The screenshot shows a mobile app interface for joining a club. At the top is a blue header with the text 'Join!' and two buttons, 'CANCEL' and 'SAVE'. Below the header is the title 'Membership form'. The form contains several fields: 'Name *' with a sub-label 'Full name' and a text input field; 'Email *' with a sub-label 'email' and a text input field; 'Membership plan' with a dropdown menu; 'Mobile' with a sub-label 'mobile' and a text input field; 'Date of Birth *' with a sub-label 'dd / mm / yyyy' and a date picker icon; and 'Info' with a text input field. Placeholder text is present in the input fields: 'Please enter your full name', 'Please enter your email address', 'Please choose a membership plan', 'Please enter your mobile number', and 'Enter your date of birth'.

When you Save the form, it will tell you that your membership request has been sent to the club Administrator's for approval.

As an Administrator, you should receive a notification on your phone, and when you start the app (or sync) a box should appear letting you know that there are pending membership requests to action in Contacts

In contacts, the new members will have the following button:



When pressed, you will be able to approve or deny their request:

Membership Request

CANCELOK

John (john@imhotek.com) has requested to join the club on the "Adult" plan. You can change their plan, or modify the first payment amount.

Decision

APPROVE

REJECT

Chosen plan

Adult

▼

Confirm that the chosen plan is correct

Start Date

01 Jan 2025

The plans first period will start from this date

Price until start date

14.79

Change the initial payment if required

Note that at this point you can change the price that they will be charged until the next membership period. If you change this to 0, then no charge will be issued.

Simply select *APPROVE* or *REJECT* to decide what to do with the new member.

If you approve, then the member will be created, the welcome message sent, and if a first payment is needed, they will be sent a payment request.

Export your existing contacts

If you export your existing contacts, you have a handy backup before you start!

However, this also gives you (most of) the fields that you will need for an import. Most of, as there are couple of special fields, and remember, you will only get membership fields exported if you have current members - like you tested above... right?

The contact export will export **all** contacts, not just members, and is found on the **Settings** menu.

Import spreadsheet

The most important part of the migration exercise is getting the import spreadsheet correct. You can start with a clean spreadsheet, with all the correct headings by editing the membership form, and clicking *Export sheet* at the bottom of the page. This will produce a sheet with all possible fields on it.

Some notes on various fields/columns:

- Name: Beware special characters
- Plan: Values in this column MUST match a plan name exactly, if not then any membership information will be ignored and they will be imported as a contact
- Email: must be a valid email address or the row will not be imported
- Mobile/Numbers: In spreadsheet land 077 can get translated to 77, so it is best to force numbers into text fields by creating them like '077 (with a leading single quote)
- Dates: The date of birth field requires that dates be entered like yyyy-mm-dd. Again watch for sheets converting to numbers
- Dropdown fields: If your form uses a dropdown field, then again, values in the sheet must *exactly* match a dropdown value
- Checkbox fields: These should be set to either 'TRUE or 'FALSE (again note the ')
- linkParent: see below.

Once you have a spreadsheet ready for import, it is a good idea to take a few rows from that sheet with perhaps 5 or 6 users and create a smaller spreadsheet first, to check for any issues in the import process. If things aren't right, you can manage the contact - edit their record, and un-check the member button, delete them, whatever - so that you can try again.

Notes on import:

- Contacts are matched using their email address.
- If an existing address is found, but they aren't a member, then any member fields will be added to their record
- If an existing address is found, and they are a member, then any member fields will be overwritten to their record

Publish your join link!

People can join the club in two ways: If they install the ClubEvent app on their phone, there is an option to join a club on the first screen, or from the menu. They will need to know the club code. Alternatively, they can use the form through the link:

<https://app.clubevent.co.uk/join?club=<your club code>>

Using the app gives people the ability to see the club events and manage their bookings, but if they use the link then they can sign up to the app at a later date, and then choose 'join club' again, which will recognise that they are already a member.