How do I create a Product?

03/12/2025 12:39 pm AEDT

Overview

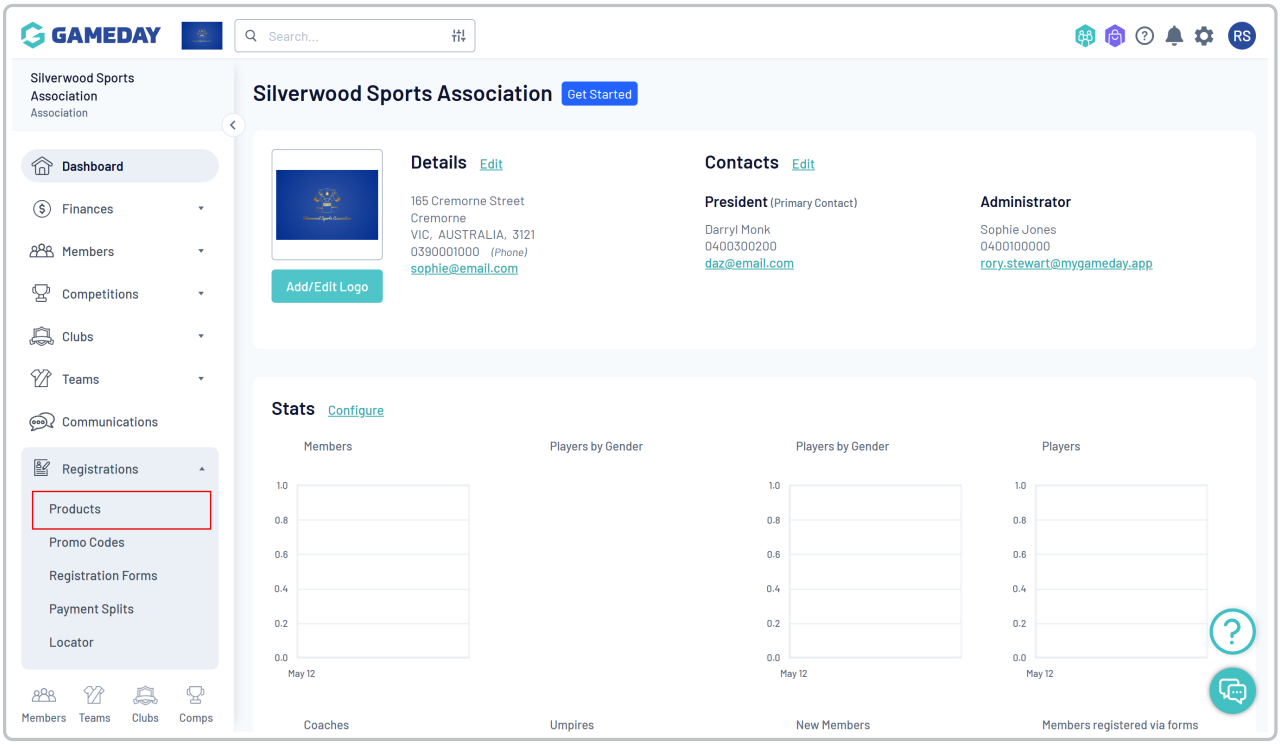
Products are fees that can be purchased by members as part of your registration process. Examples of products may include registration fees, playing gear, merchandise or event tickets.

Products can be created within your Passport database and attached to a registration form in order to display fees for purchase on that registration form.

Creating a Product

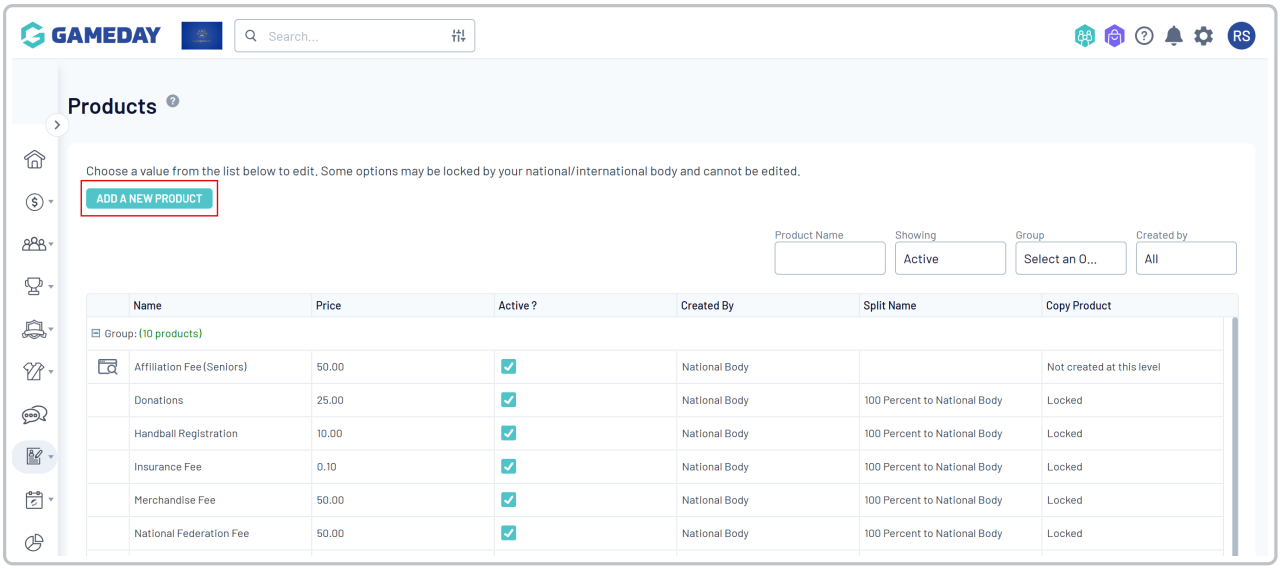
Step 1: Open your Product list

Select the **Registrations** menu, then select **PRODUCTS**



Step 2: Create your product

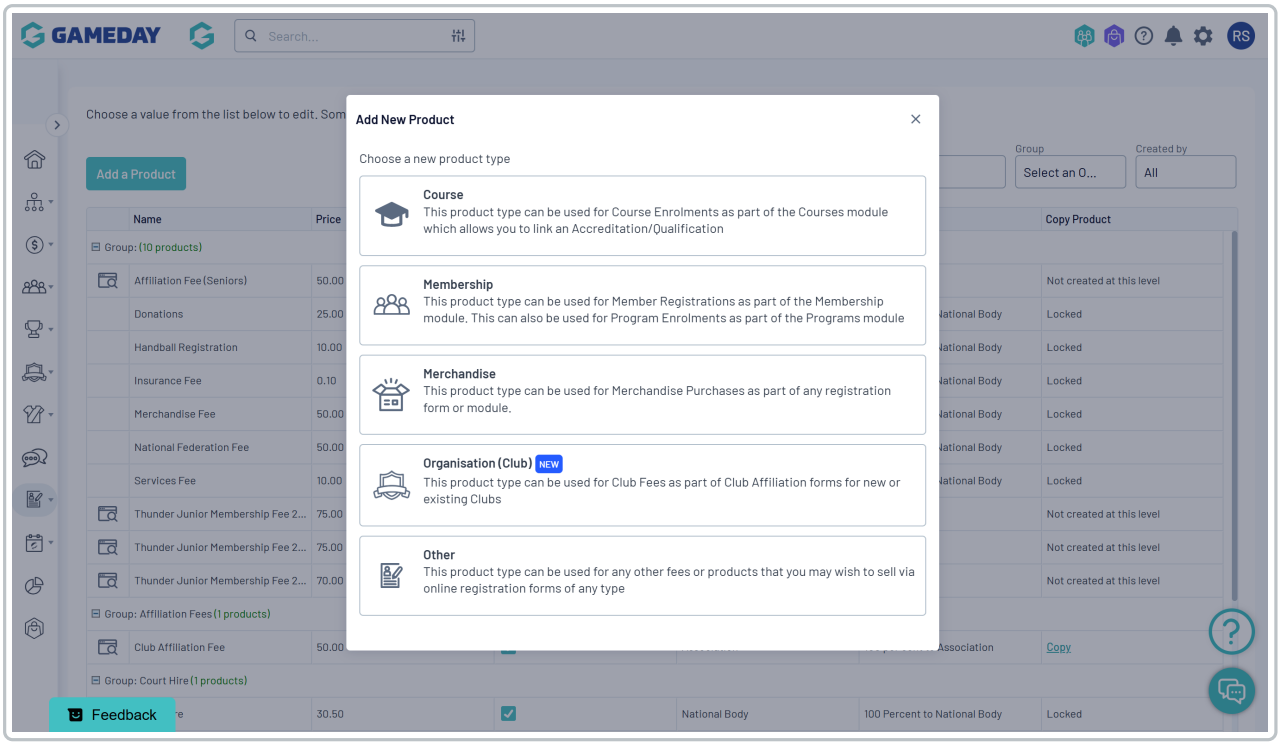
Click **ADD A NEW PRODUCT** in the top left corner



Step 3: Select a Product Type

Select one of the available product types to define the intention of your product. Some of the available product types include:

- **Course:** This product type can be used for Course Enrolments as part of the Courses module which allows you to link an Accreditation/Qualification
- **Membership**: This product type can be used for Member Registrations as part of the Membership module. This can also be used for Program Enrolments as part of the Programs module
- **Merchandise**: This product type can be used for Merchandise Purchases as part of any registration form or module.
- **Organisation (Club)**: This product type can be used for Club Fees as part of Club Affiliation forms for new or existing Clubs
- **Other**: This product type can be used for any other fees or products that you may wish to sell via online registration forms of any type



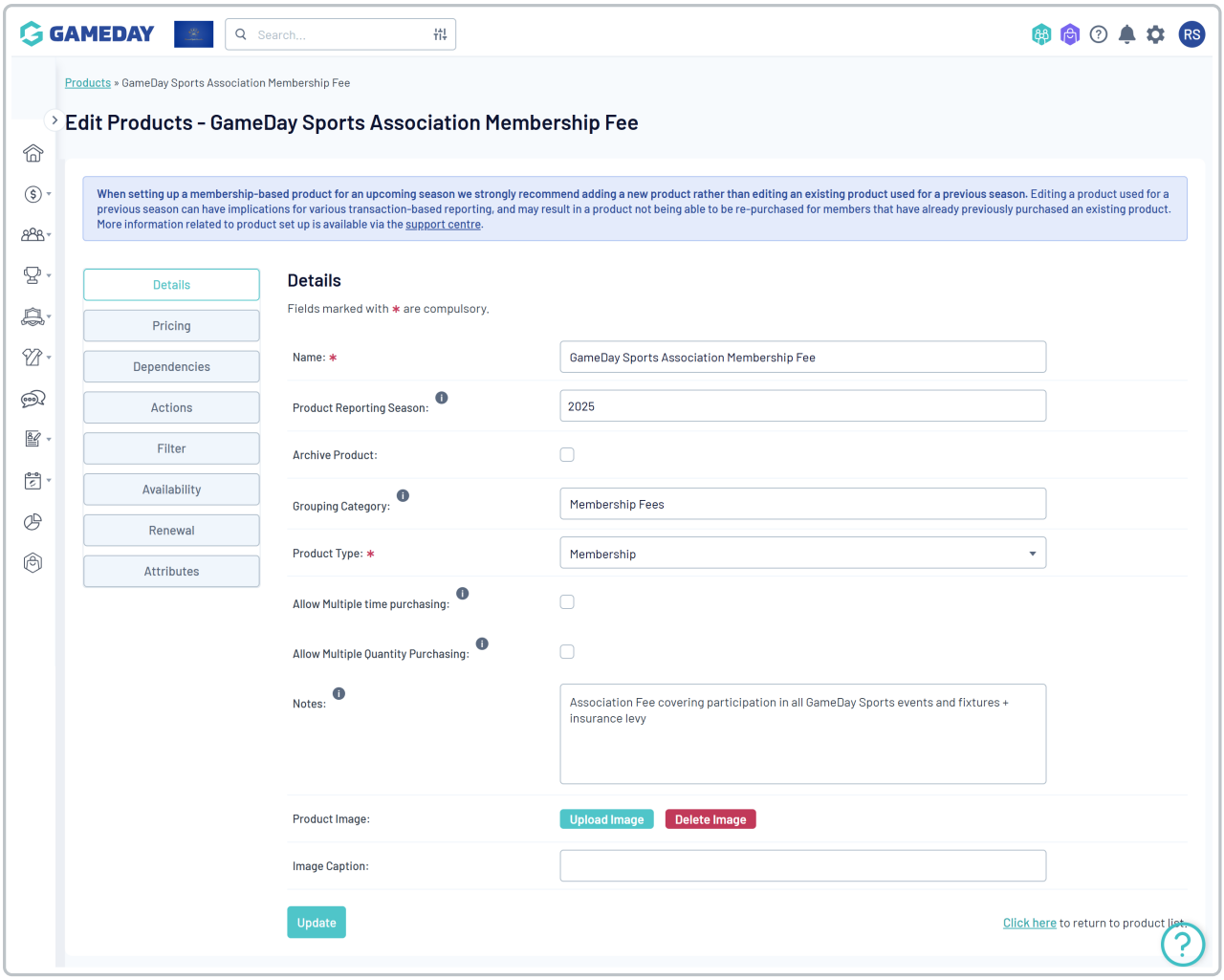
Step 4: Complete the reminder of the product setup

Use the rest of the product setup process to define you general settings, pricing, display filters and more

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Details

The first tab you'll see when creating a product is **Details**



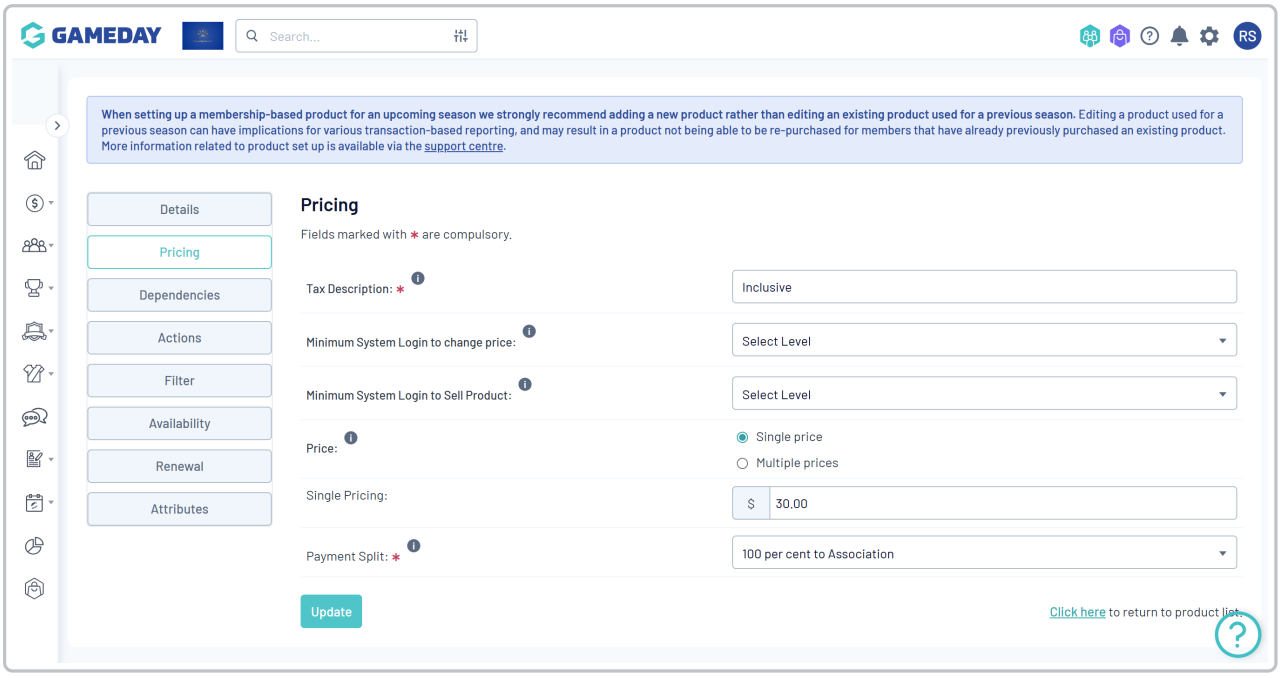
- **Name:** This is the name of the product as will be displayed to members
- **Product Reporting Season:** Used as a filter for products purchased when running reports
- **Archive Product:** Ticking this box will set the product as inactive. It will still be in your database, however you will need to filter your products by 'Inactive (Archived)' on the Product List
- **Grouping Category:** Allows your products to be grouped together under a custom heading on your registration form and your database's product list
- **Product Type**: Choose the option that corresponds to the purpose of the product.
    - **Membership** products are used as fees covering membership to your organisation
    - **Merchandise** products are used as fees for any additional merchandise or physical item, such as a shirt or a cap
    - **Event** products are used with the Events functionality as event entry fees
    - **Organisation** products can be used for org-to-org registrations, such as a club affiliation fee
- **Allow Multiple Time Purchasing:** Allows a product to be purchased more than once by the same member at different times. For example, with this option ticked, a member could purchase the product in March, then purchase the product again in June. If the option is not selected, members can only purchase the product once.

Note: This rule applies to each individual member. Registrants who are responsible for registering multiple members at once will still be able to purchase a product for each member under their account if these options are turned off.

- **Allow Multiple Quantity Purchasing:** Allows each member to purchase one or more of this product within the same registration

Pricing

The second tab is **Pricing**. This is where you can set up the payment structure of your products.

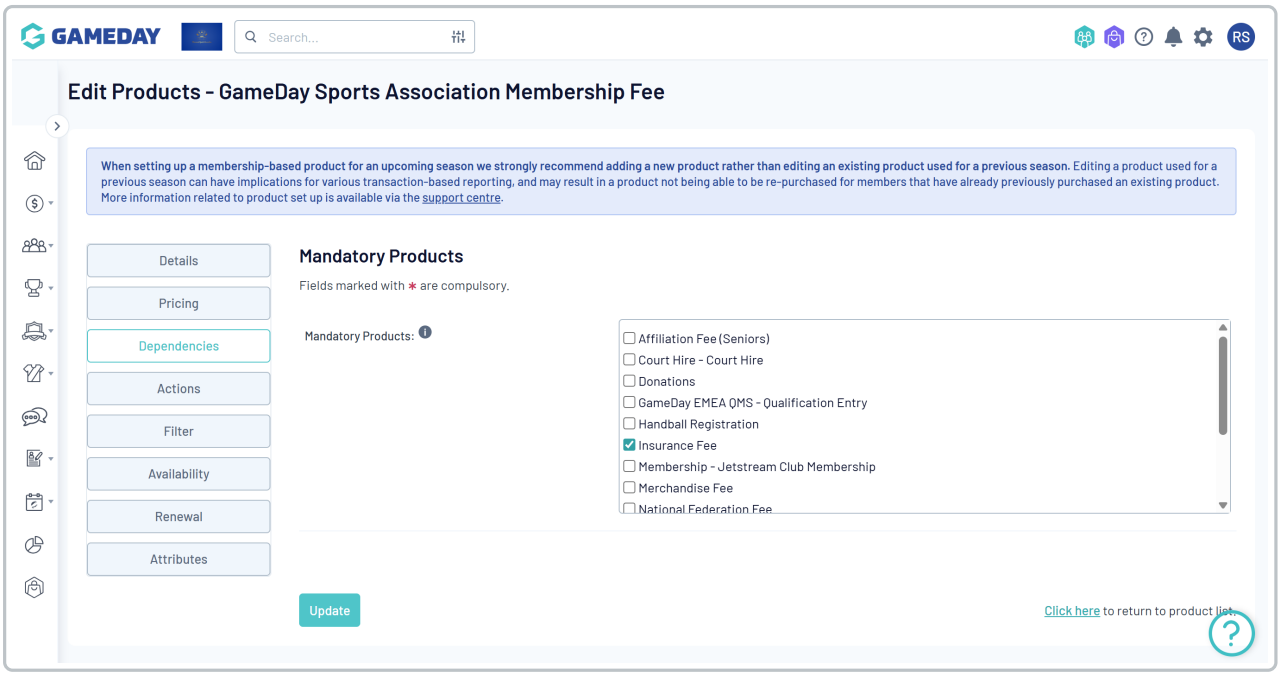


- **Tax Description:** Appears on the payment receipt email that members receive after registering
- **Minimum System Login to change price:** Indicates the minimum hierarchy login level at which the price of the product can be changed. For example, if this is set to **Association**, then any organisations below Association-level in your sport's hierarchy (I.e. **Clubs**) will not have permission to edit the product's price
- **Minimum System Login to sell product:** Indicates the minimum hierarchy login level through which the product can be added to registration forms. For example, if this is set to Association, then any organisations below Association-level in your sport's hierarchy (I.e. Clubs) will not have permission to add the product to their registration forms
- **Price:** Select whether the product is a single price or multi-price (discount for multiple registrations)
    - **Single price** ensures the price is consistent across all registrations
    - **Multiple prices** allows you to set different prices depending on the number of members being included in the same registration (for example, family membership discounts)
    - **Ranged prices** allows lower hierarchy levels to set their own price within a defined range
- **Payment Split**: Apply a payment split rule to determine how the product's incoming funds are distributed across each relevant organisation by hierarchy level. For example, selecting 100% to Club will mean all incoming funds for this product are distributed to the bank account added within the club database.

Note: We're phasing out product-based Payment Splits so the Payment Split field is may be locked and cannot be edited. This is to ensure transparency for purchasers and will allow more orders to be refunded. We recommend Products to be created at each Organisation in the hierarchy to receive payouts for their own products.

Dependencies

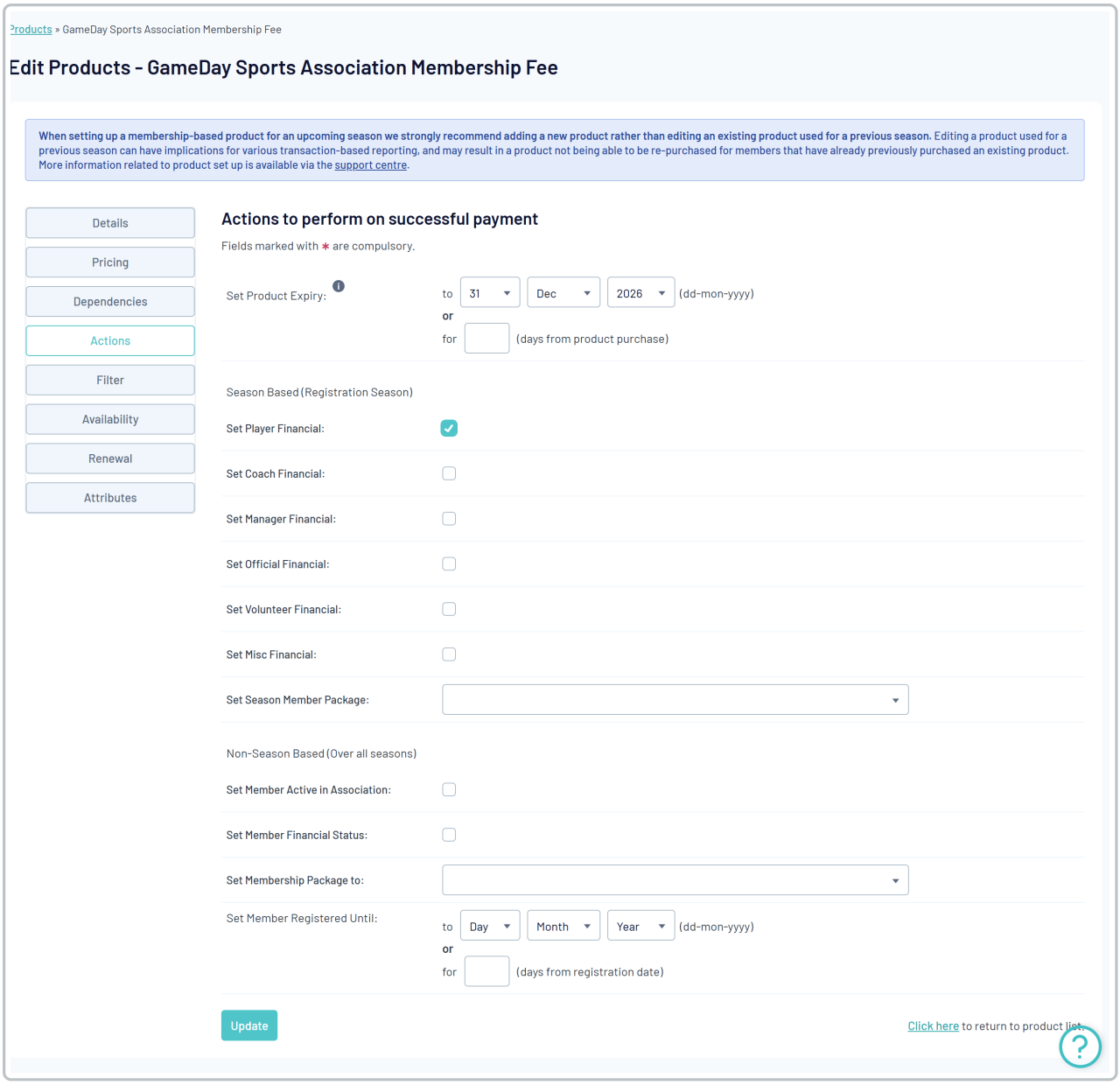
The third tab is **Dependencies,** where you can mandate the selection of other products from your database to trigger the availability of your new product



- **Mandatory Products:** Mandate that registrants purchasing this product must also purchase (or have previously purchased) the Mandatory Product (for example, an Insurance Fee)

Actions

The **Actions** tab allows you to configure how a membership will display on a member's profile after they have purchased the product.

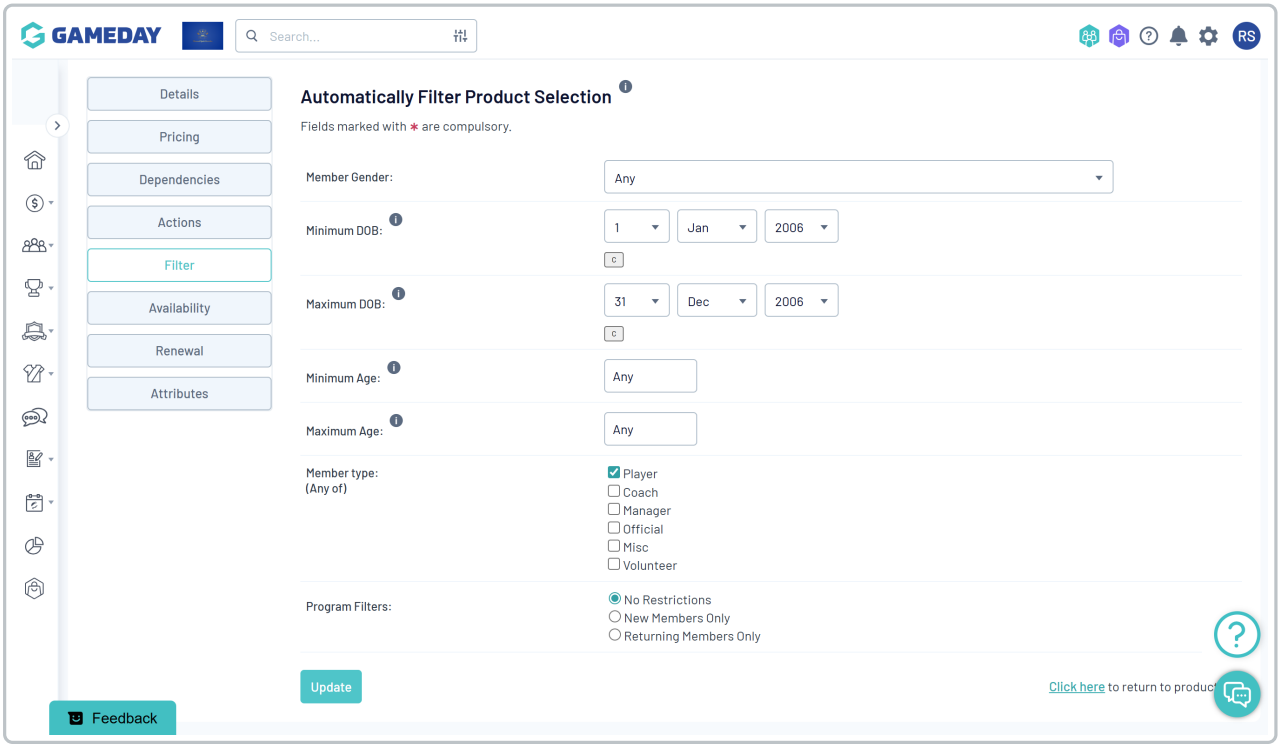


- **Set Product Expiry:** Define the date on which the product's registration will lapse for members who purchased it. This date also influences when renewal notifications are sent (see Renewal tab)
- **Set Player Financial:** Tick this box if the member's player status should be **Financial** for the season after purchasing this product.
- **Set Coach Financial:** Tick this box if the member's coach status should be **Financial** for the season after purchasing this product.
- **Set Match Official Financial:** Tick this box if the member's match official status should be **Financial** for the season after purchasing this product.
- **Set Member Registered Until:** Set a date, or number of days from registration that the member will be registered for.

Note: the **Set Member Registered Until** field needs to be added for all products if your organisation is using the Courtside App for members to show as registered in the app.

Filter

The **Filter** tab allows you control who the product displays to based on the information provided by the member during the first page of the registration form.



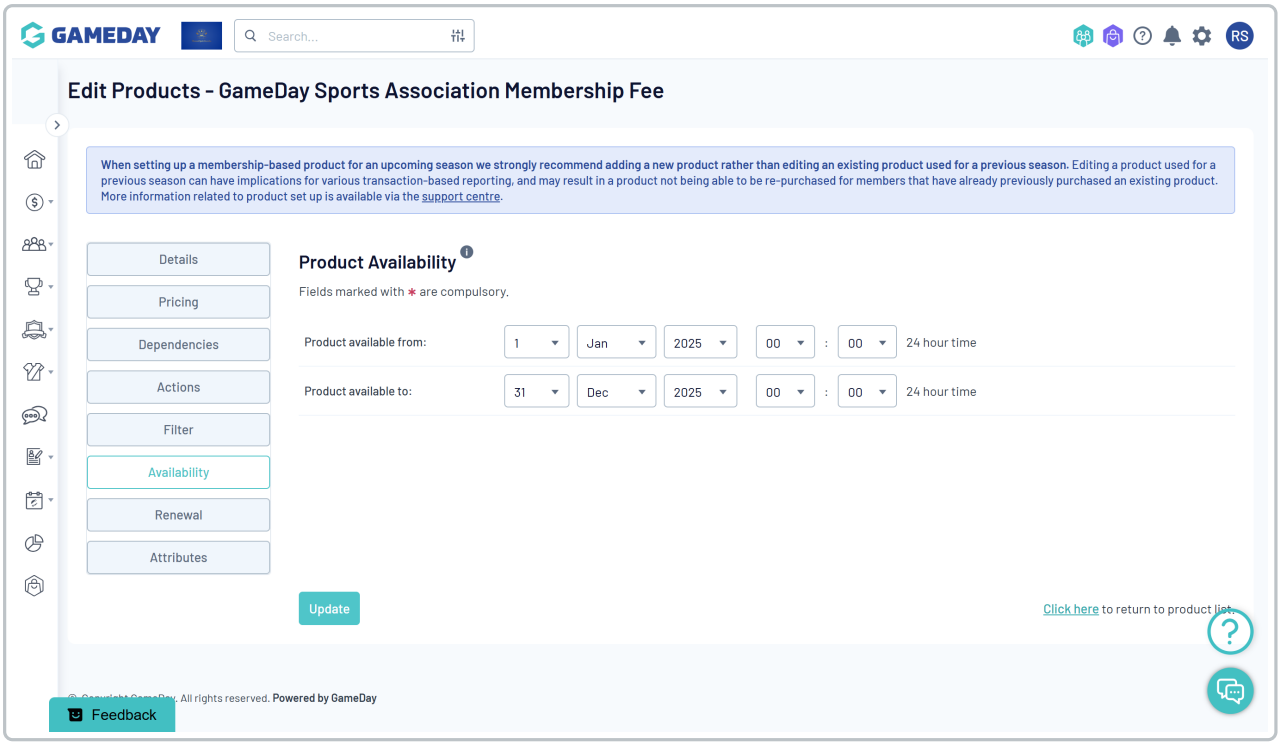
- **Member Gender:** Select the gender to which the product will display
- **Minimum Date of Birth:** Older end of Date Range. For example, if set to 01-Jan-1970, only members born on or after this date will see the product
- **Maximum Date of Birth:** Younger end of Date Range. For example, if set to 31-Dec-2020, only members born on or before this date will see the product
- **Minimum/Maximum Age:** Add an age range to display the product only to members registering within that age range at the time of registration

> **Note:** Do not add a selection for both Maximum/Minimum DOB and Maximum/Minimum Age, as this will cause the product to not display on the registration form. Select either DOB or Age.

- **Member Type (any of):** If you'd like your products to only be available to a specific Member Type, tick the relevant boxes. This relies on your members selecting the relevant option on the first page of the registration form. If the product should display to all member types, do not select any boxes.

Availability

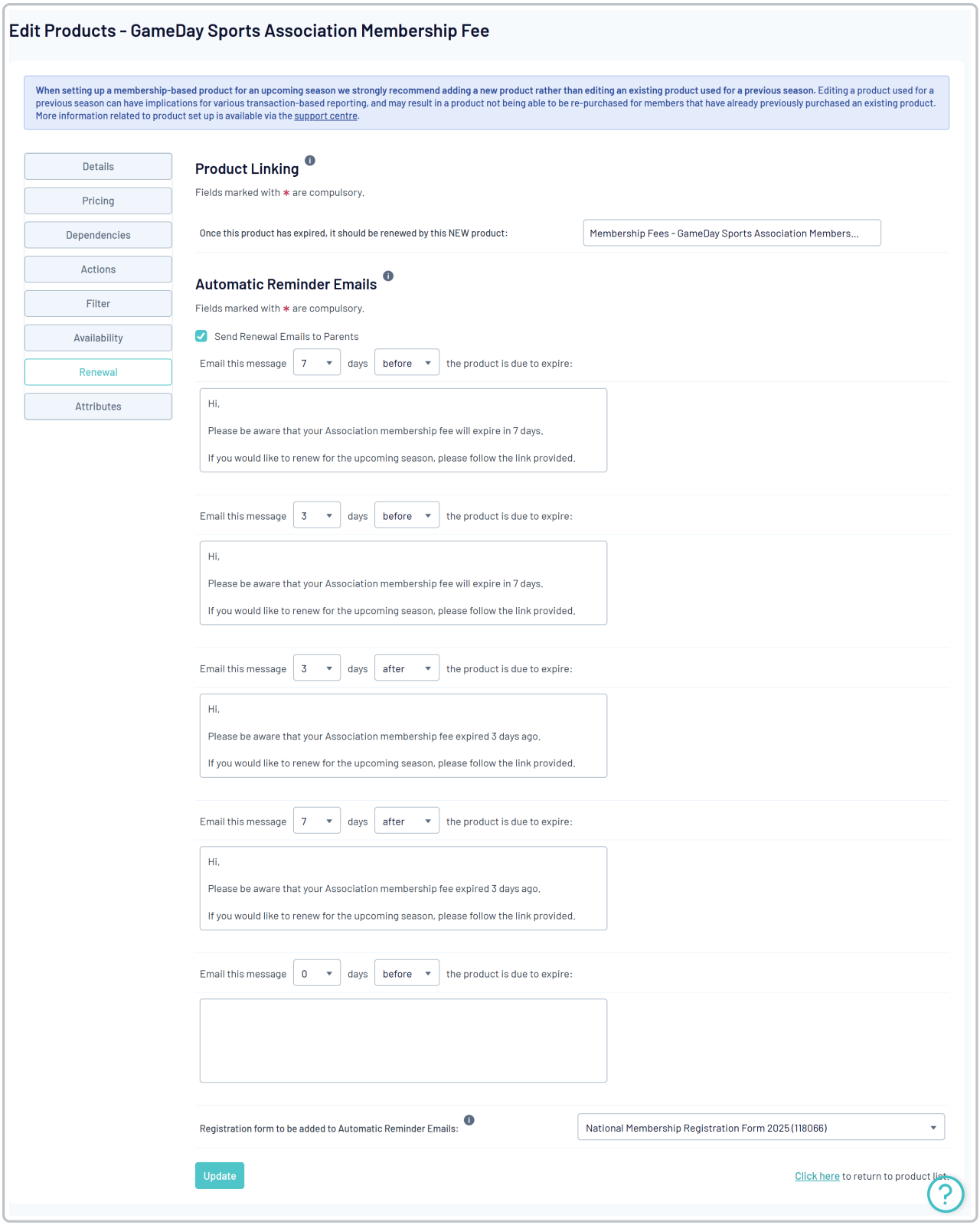
The sixth tab is **Availability**



- **Product Available From/To Dates**: Allows you to display the product on registration forms for the selected period of time.

Renewal

The **Renewal** allows you to trigger automatic renewal notifications when the product is reaching its expiry date



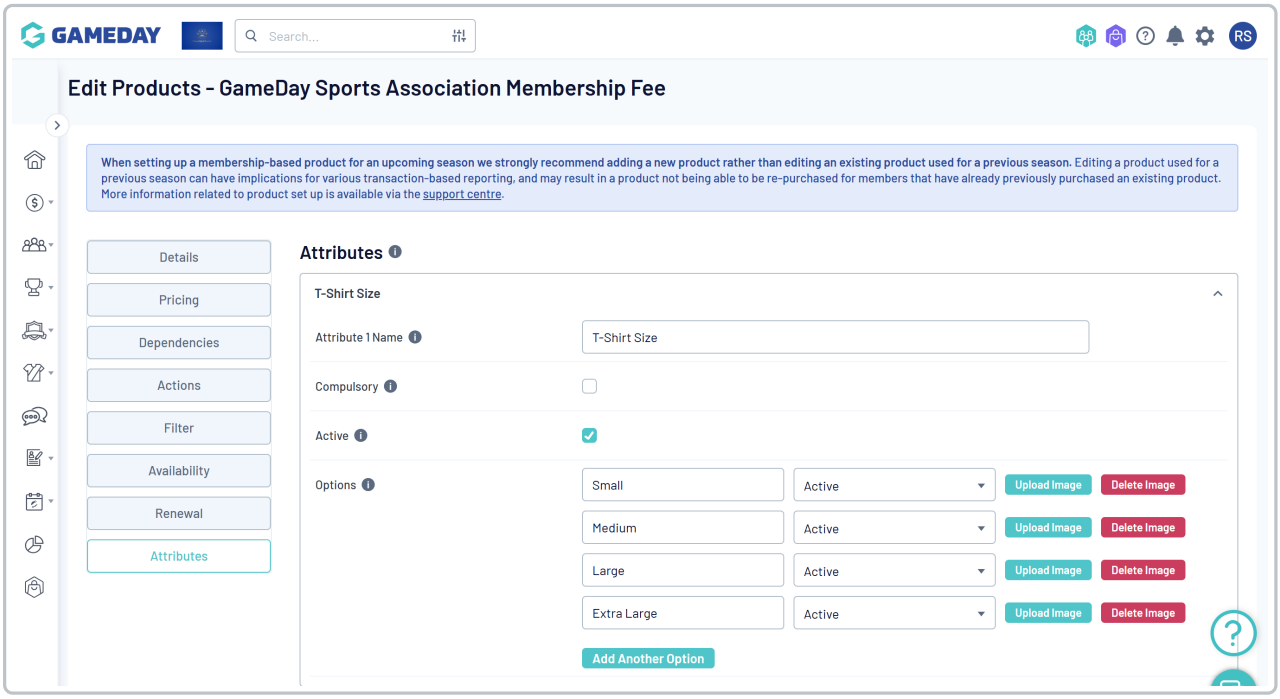
- **Product Linking**: Allows you to select a product that should be purchased once the product being setup has expired.
- **Automatic Reminder Emails**: Notify members that have purchased the product that it will be expiring soon and the product selected above in **Product Linking** is available for purchase.
- **Send Renewal Email to Parents**: You can also select whether or not to send this renewal email to parents as well as the member (if they have different emails).

Note: This will only send to parents emails if these are listed within the members profiles within the Parent 1

Email or Parent 2 Email fields.

Attributes

The **Attributes** tab gives administrators the ability to offer additional add-on items for a specific product, such as a T-Shirt or a Cap.



- **Attribute**: The selections available for the add-on product (eg. T-Shirt Size)
- **Compulsory**: Select whether the item is required to be selected by members
- **Active**: Select whether the item is to be shown on the form for members
- **Add Another Option**: Add each selectable option that will display for the item (e.g. Sizes Small, Medium and Large)

Once you've finished creating your product, click **UPDATE**

If you want to make your Product available for purchase, you will now need to attach it to a Registration Form