



## How do I create a Product?

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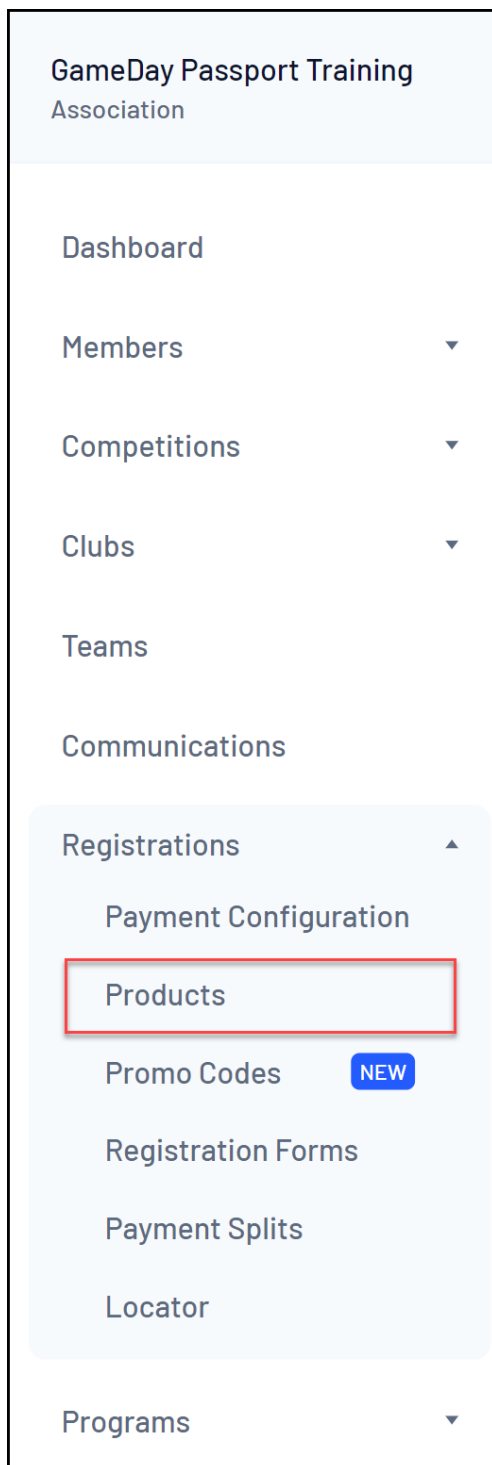
**Products** are fees that can be purchased by members as part of your registration process. Examples of products may include registration fees, playing gear, merchandise or event tickets.

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

To add a new product:

1. Select the **REGISTRATIONS** menu, then select **PRODUCTS**



The **Products** screen lists all existing products in your database, including those that have been shared down to you from a higher level. If Products have been assigned to a group (eg. Association Fees, State Fees or Club Fees) they will appear below their group heading in the list.

The Products list can be filtered by the organisation that created the product, the Product Group or the Product Status

You can search for products typing in the **Product Name** search field

**Products** <sup>2</sup>

Choose a value from the list below to edit. Some options may be locked by your national/international body and cannot be edited.

[ADD A NEW PRODUCT](#)

Product Name
Showing  
Active
Group  
Select an O...
Created by  
All

Name	Price	Active ?	Created By	Split Name	Copy Product
Group: Association Fees (10 products)					
2022/2023 Age 06 Membership Fee	50.00	<input checked="" type="checkbox"/>	Association	100 per cent to Association	<a href="#">Copy</a>
2022/2023 Age 07 Membership Fee	50.00	<input checked="" type="checkbox"/>	Association	100 per cent to Association	<a href="#">Copy</a>

## 2. Click **ADD A NEW PRODUCT**

**Products** <sup>2</sup>

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[ADD A NEW PRODUCT](#)

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## Details Tab

The first tab in the Add/Edit Products screen is **Details**.

Details

Pricing

Dependencies

Actions

Filter

Availability

Renewal

Items

### Details

Fields marked with \* are compulsory.

**Name: \***

**Product Reporting Season:**   
(Used in Reporting as a filter for Products purchased)

**Archive Product:**

**Grouping Category:**

**Product Type: \***

**Allow Multiple time purchasing:**  Allows this product to be purchased several times (eg in Feb & July)

**Allow Multiple Quantity Purchasing:**  Allows this product to be purchased in multiples (eg 2 x socks)

Note: this does not relate to registering multiple people.  
Allow Multiple Adult/Children is configured in the Registration Form setup.

**Notes:**

Add any information here that purchasers should see before they complete their transaction

- **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
- **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 Tab

The second tab on the Add/Edit Product screen 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. Click [here](#) for more information on adding bank accounts to Passport

## Dependencies Tab

The third tab is **Dependencies**

The screenshot shows the 'Mandatory Products' section of a software interface. On the left, there is a vertical navigation menu with buttons for 'Details', 'Pricing', 'Dependencies' (which is highlighted in green), 'Actions', 'Filter', 'Availability', 'Renewal', and 'Items'. The main content area is titled 'Mandatory Products' and includes a note: 'Fields marked with \* are compulsory.' Below this, there is a descriptive text: 'Select a mandatory product. The purchases will automatically be required to buy the mandatory product as well as the product here. A typical example is a joining fee. So any person can select which registration product they wish to purchase, but everyone must also pay the joining fee.' A list of products is shown with checkboxes:

- National Capitation Fees - National League Age 10 Capitation 2022/23
- National Capitation Fees - National League Age 11 Capitation 2022/23
- National Capitation Fees - National League Age 12 Capitation 2022/23
- National Capitation Fees - National League Age 13 Capitation 2022/23
- National Capitation Fees - National League Age 14 Capitation 2022/23
- National Capitation Fees - National League Age 15 Capitation 2022/23
- National Capitation Fees - National League Age 16 Capitation 2022/23
- National Capitation Fees - National League Age 2-4 Capitation 2022/23
- National Capitation Fees - National League Age 5 Capitation 2022/23

At the bottom left of the main content area is an 'Update' button. At the bottom right is a link: 'Click [here](#) to return to product list.'

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

## Actions Tab

The fourth tab in the Add/Edit Products screen is **Actions**.

This menu will allow you to configure how a membership will display on a member's profile after they have purchased the product.

- Details
- Pricing
- Dependencies
- Actions
- Filter
- Availability
- Renewal
- Items

### Actions to perform on successful payment

Fields marked with \* are compulsory.

Set Product Expiry: to  ▼  ▼  ▼ (dd-mon-yyyy)

or

for  (days from product purchase)

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Season Based (Registration Season)

Set Player Financial:

Set Coach Financial:

Set Manager Financial:

Set Official Financial:

Set Volunteer Financial:

Set Misc Financial:

- **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 Tab

The fifth tab in the Add/Edit Product screen is **Filter**.

This allows you select who the product displays to based on the information provided by the member during the first page of the registration form.

- Details
- Pricing
- Dependencies
- Actions
- Filter
- Availability
- Renewal
- Items

### Automatically Filter Product Selection

Fields marked with \* are compulsory.

Use these fields to automatically show some products. If you tick 'Coach' then this product will only show to people trying to register as a coach. Similarly you could use the date of birth fields to show products only relevant to individuals under or over a certain age.

Member Gender:

Minimum DOB:

☞ Older end of Date Range (eg 01 - Jan - 1970)

Maximum DOB:

☞ Younger end of Date Range (eg 31 - Dec - 2000)

Minimum Age:

(eg: If 10 is chosen, this product will be available for 10 year olds and above)

Maximum Age:

(eg: If 10 is chosen, this product will be available for 9 year olds and under)

Member type: (Any of)

- Player
- Coach
- Manager
- Official
- Misc
- Volunteer

- **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.

**Note:** Product Filtering is best used alongside [Compulsory Payments](#)

## Availability Tab

The sixth tab on the Add/Edit Products screen is **Availability**.

- Details
- Pricing
- Dependencies
- Actions
- Filter
- Availability
- Renewal
- Items

### Product Availability

Fields marked with \* are compulsory.

If left blank the product will be available all the time.

Product available from:     :  24 hour time

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Product available to:     :  24 hour time

In this example, our Product will only start appearing on registration forms to which it is attached on 1 January 2023 at 9am, and will automatically stop appearing on forms on 31 July 2023 at 5:01pm

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

## Renewal Tab

The seventh tab on the Add/Edit Products screen is **Renewal**.

### Product Linking

Fields marked with \* are compulsory.

Product linking is a way to renew product purchases, it makes the expiry date of an old product, the commencement date of a new product.

Once this product has expired, it should be renewed by this NEW product:

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### Automatic Reminder Emails

Fields marked with \* are compulsory.

Send Renewal Emails to Parents

Members can be reminded that a product they have purchased is due to expire/is expired, by creating automatic reminder emails.

Email this message  days  the product is due to expire:

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Email this message  days  the product is due to expire:



- **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.

## Items Tab

The eighth tab on the Add/Edit Products screen is **Items**.

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

- **Item:** 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)

4. 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](#)