How do I create a Product?

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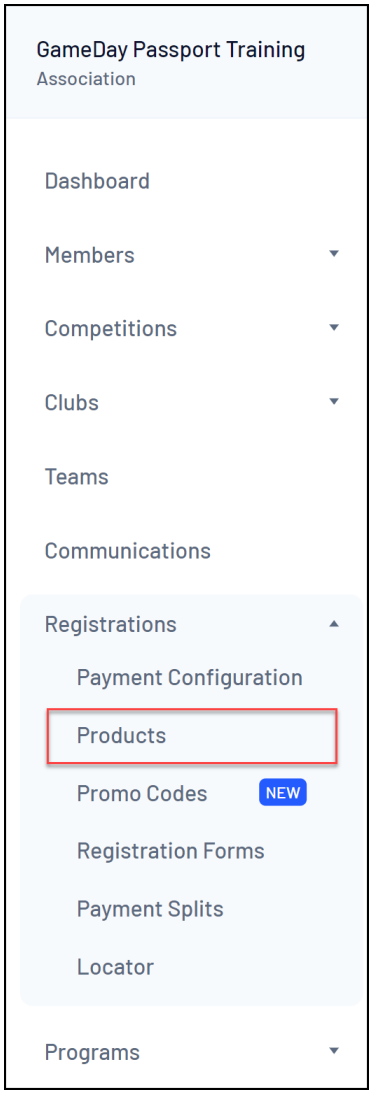
Firstly, login to your Online Membership Database - If you don't have your login details please contact your State Governing Body or Association.

Products refer to 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 any organisation's back end Passport database and attached to Registration Forms in order to surface selectable fees towards the end of that registration form.

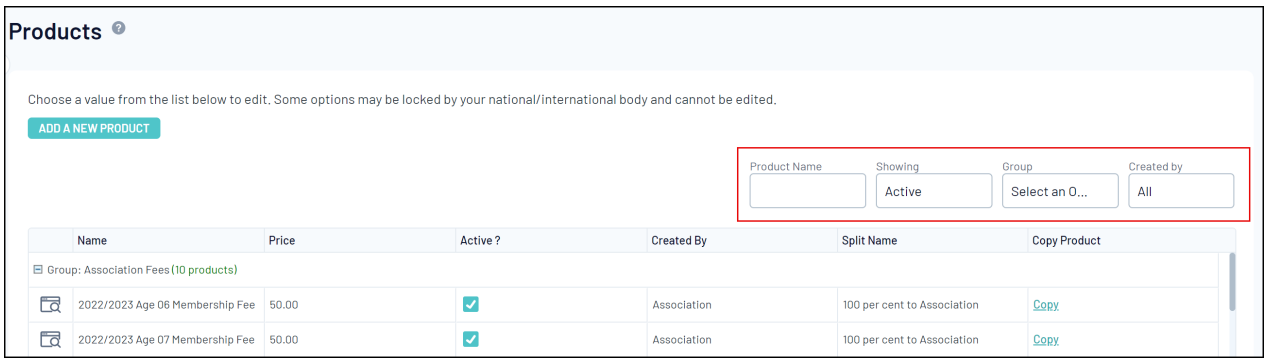
Below are detailed examples of how to create your product:

1. On the left-hand menu, click **Registrations**, then select **PRODUCTS**

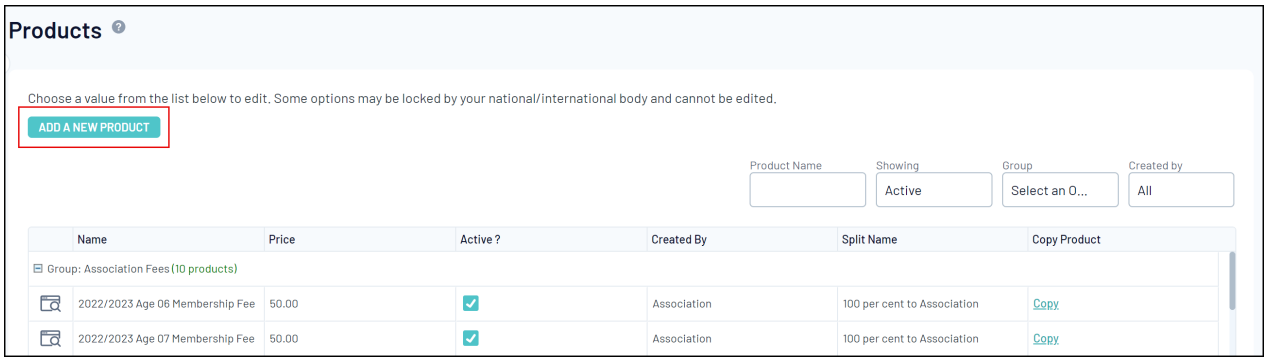


The **Products** screen lists all existing products in your database, including those that have been shared down to you from a higher level (if any). If Products have been assigned to a group (eg. Association Fees, State Fees or Club Fees) they will appear below their group heading in the list.

The product list can be filtered by the organisation that 'Created' the product within your hierarchy, the Product Group or the Active/Inactive Status, and you can search for products using the Product Name search field



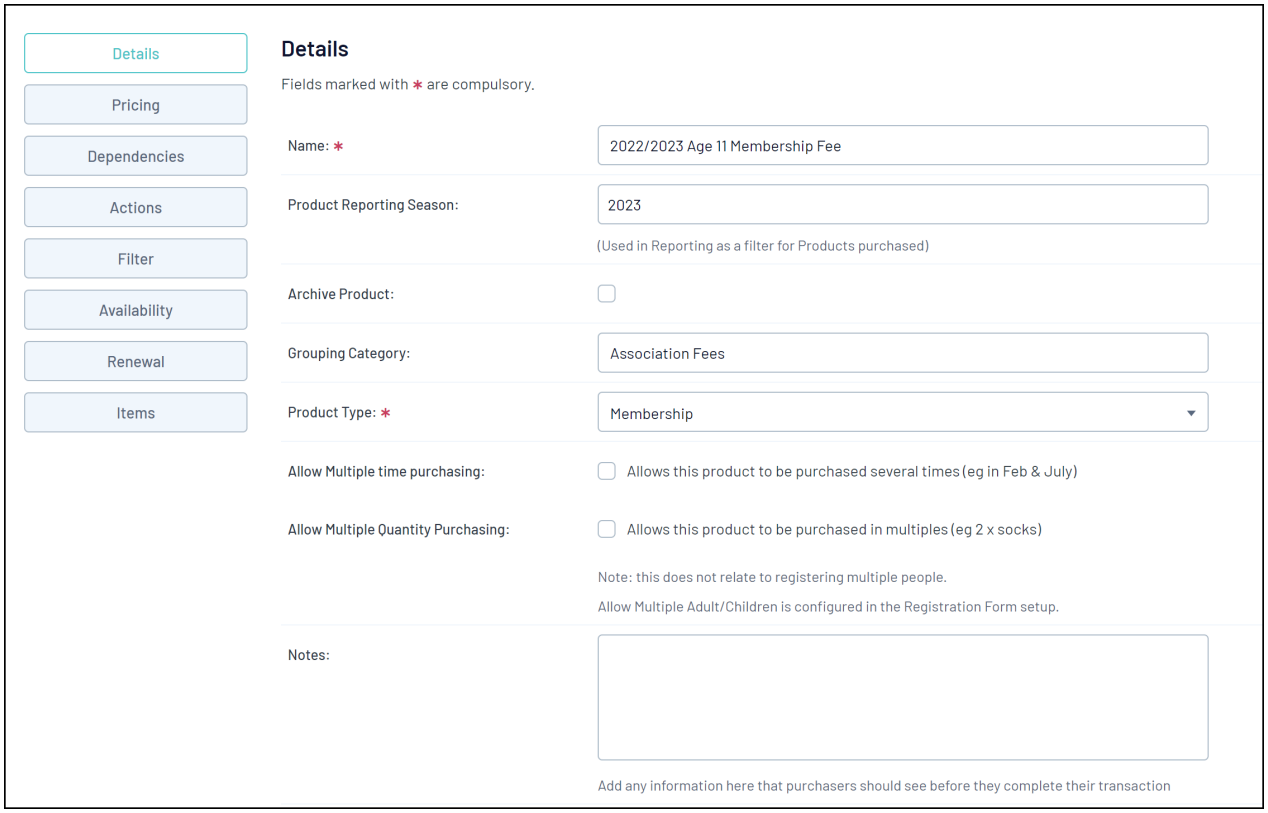
2. Click the **ADD A NEW PRODUCT** button



3. Complete any relevant details as below:

Details Tab

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



Name: This will be the name of the product as will be displayed to members

Product Reporting Season: The season that the product applies to. For example, if your product is active for your 2023 Winter season, select this in this drop-down selection. This will assist in reporting on which products were purchased in which season.

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: This will allow your products to be grouped together on your registration form and back end product list

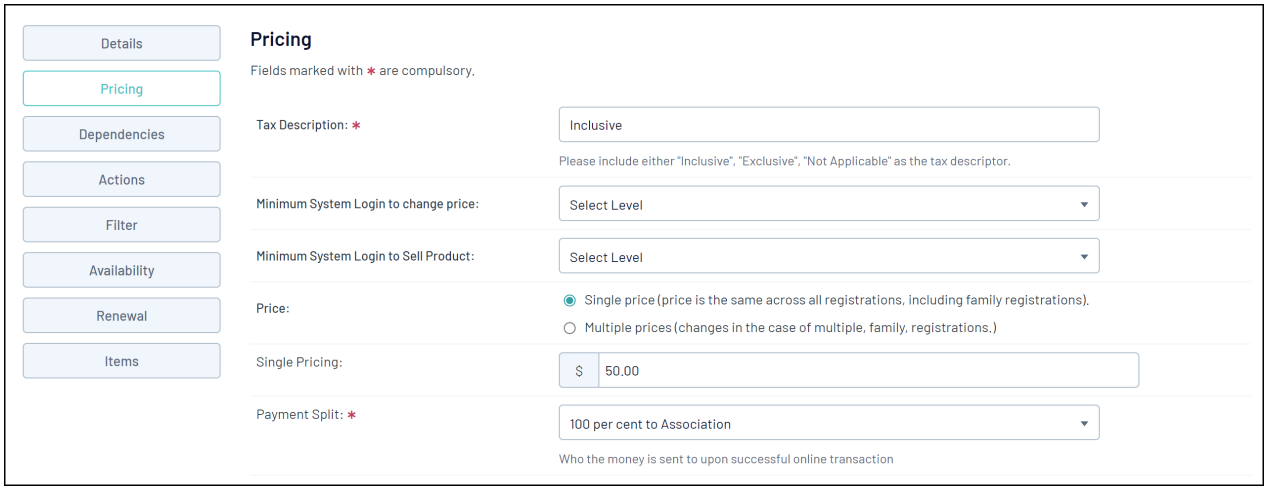
Allow Multiple time purchasing: This will allow a product to be purchased on more than one occasion. For example, a member can log in to the form in March to purchase the product, then come back in June and purchase the same product again.

Allow Multiple quantity purchasing: This will allow a quantity of more than one to be purchased within the same registration.

Notes: This will allow you to include any additional information about the product which can be seen by members when the product is attached to a registration form.

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: This option should be set to Inclusive, and displays on payment confirmation emails received by members

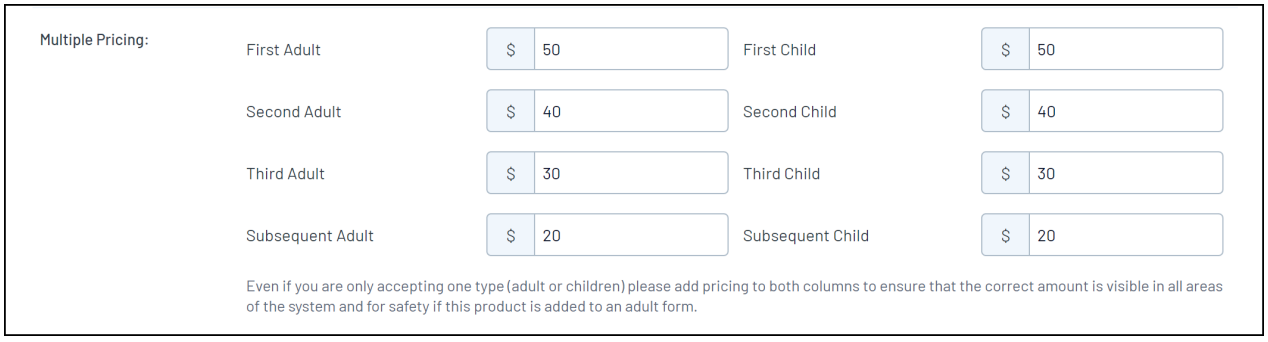
Minimum System Login to change price: The level at which the price of the product can be changed. If for instance an association sets up a product and sets this option to **Association**, the organisations under the association in the hierarchy won't be able to change the price of the product.

Minimum System Login to sell product: The minimum level at which a product can be added to registration forms.

Price: Select whether the product is a single price or multi-price (i.e. discount for multiple registrations)

Single Pricing: Price of the product if single pricing is selected

Multiple Pricing: Allows you to create a multiple pricing system, whereby the first adult or child's price can differ from that of the second, third or subsequent member registered as part of the same registration session, as shown below:



Payment Split: Determines where the funds for this product will be sent, based on the bank account added to Passport at each level. For example, selecting 100% to Club will ensure 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

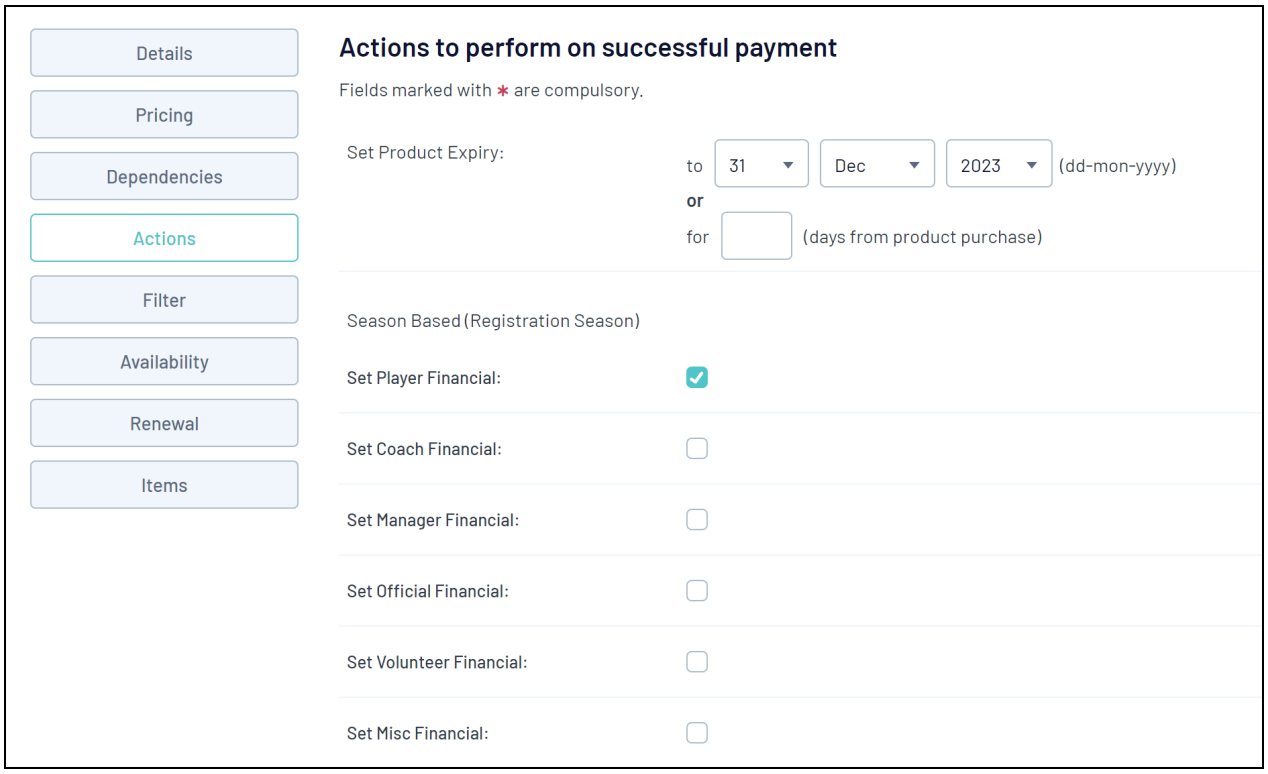
The third tab Add/Edit Products screen is **Dependencies**.

Mandatory Products: This allows you to tie the availability of this product to an existing product. For example, if you require another product to be purchased before members have access to the product you are creating, you can tick the box next to the existing product in the **Mandatory Products** list.



Actions Tab

The fourth tab in the Add/Edit Products screen is **Actions**. This menu will allow you to configure how the member's record will display after purchasing the product.



Set Product Expiry: This sets a date for the product status to become inactive on the member's record.

Set Player Financial: Tick this box if you'd like the member's player status to be marked as 'Financial' for the season after purchasing this product.

Set Coach Financial: Tick this box if you'd like the member's coach status to be marked as 'Financial' for the season after purchasing this product.

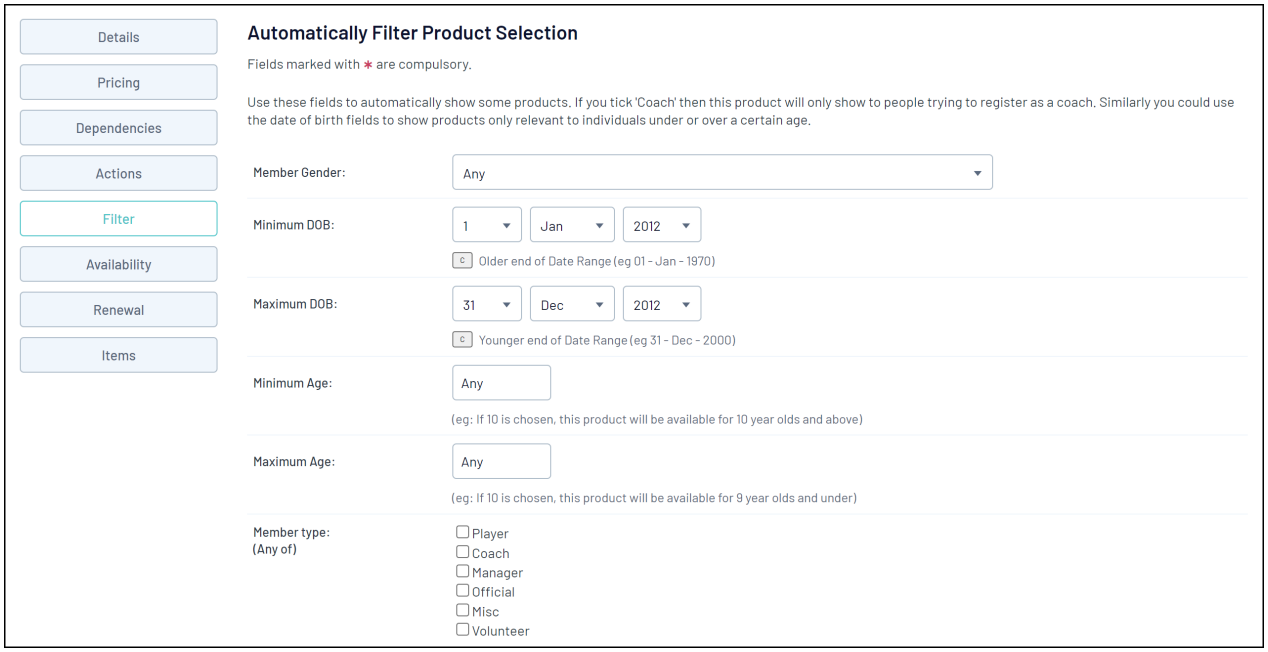
Set Match Official Financial: Tick this box if you'd like the member's match official status to be marked as 'Financial' for the season after purchasing this product.

Set Member Registered Until: Set a date, or number of days from registration, that the member will be registered for.

> Note: this **Set Member Registered Until** field needs to input for all products if your organisation is going to be using Courtside in order for members to show as registered.

Filter Tab

The fifth tab in the Add/Edit Product screen is **Filter**. This allows you to apply filters which determine to whom the product displays based on the information provided by the member during the first page of the registration form.



Member Gender: Set this to **Male** if you'd like products to only display for males, and **Female** to display only to females.

> **NOTE: if you apply an age range filter on your product, please do not set both the AGE and DOB filter as these will conflict with each other and the products will not show correctly on the form.**
>
> **NOTE: we recommend using just the DOB filter as the age filter one can be a bit temperamental as it can sometimes include and exlude ages that you may not want as a part of your product. The DOB range uses exacts so members do not miss out.**

Minimum/Maximum Date of Birth: Apply a date of birth range to ensure the product only shows to members whose date of birth is within that range. Members who enter a date of birth

outside of this range will not have access to purchase this product.

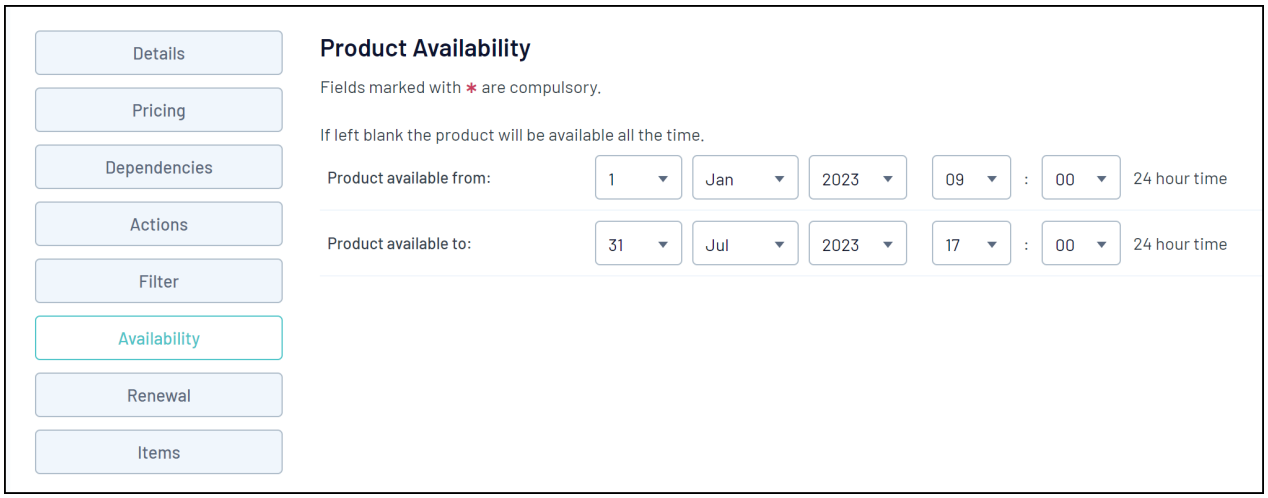
Minimum/Maximum Age: Apply an age range to ensure the product only shows to members whose date of birth places them within that age range at the time of registration.

Member type (any of): If you'd like your products to be available to a specific Member Type, tick the relevant boxes. This relies on your members ticking the relevant option on the first page of the registration form.

Product Filtering is best used in tandem with Compulsory Payments

Availability Tab

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

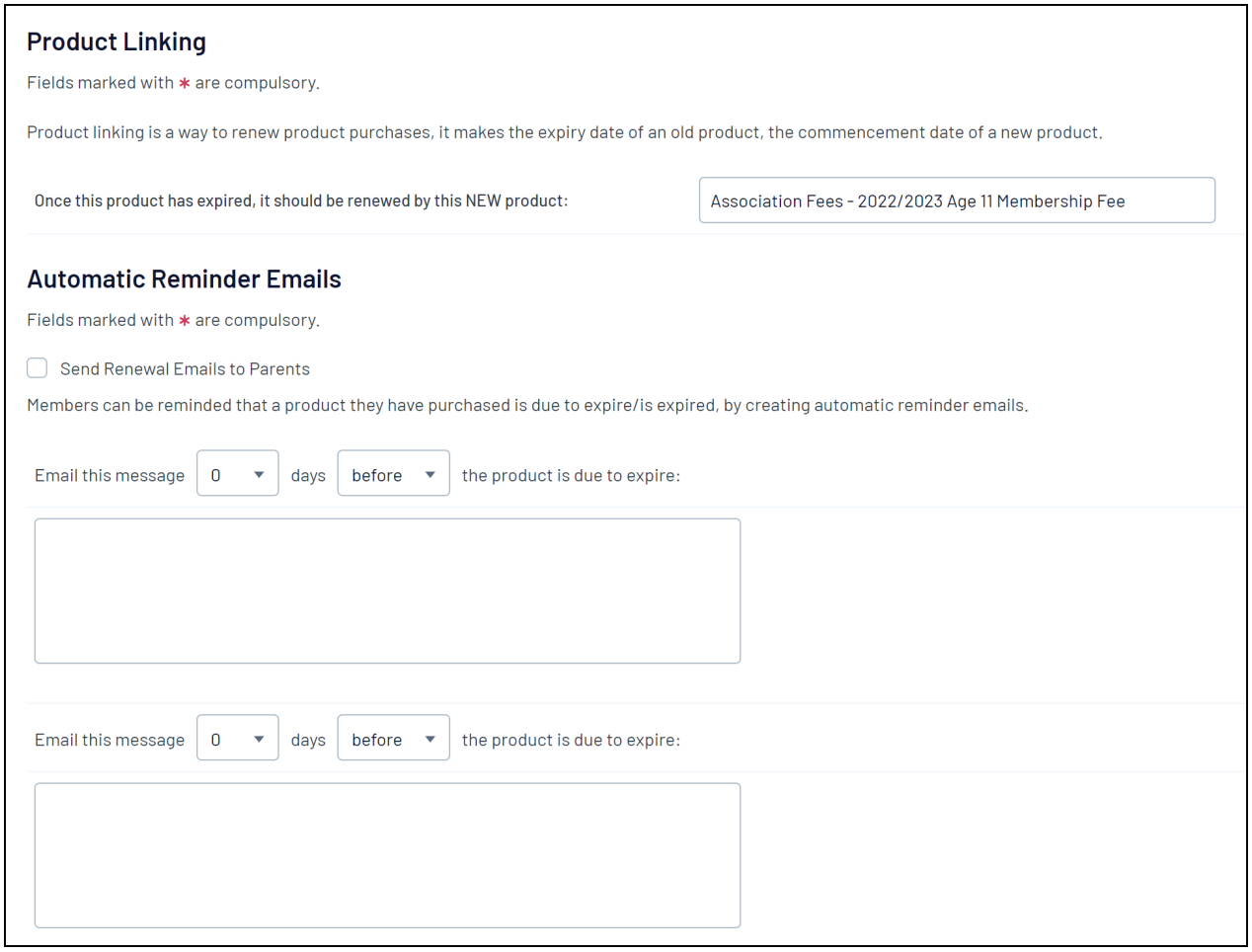


Product Available From/To Dates: Allows you to display the product on registration forms for a defined period of time.

For example, a product may only be available for purchase up until 1 week before an event. Adding a Product Available To date will automatically take the product off the registration form on that date, rather than having to manually take the product off the registration form on that date.

Renewal Tab

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



Product Linking: Allows you to set up a certain product (eg. Product A) to be superseded by another product (eg. Product B) upon its expiry date.

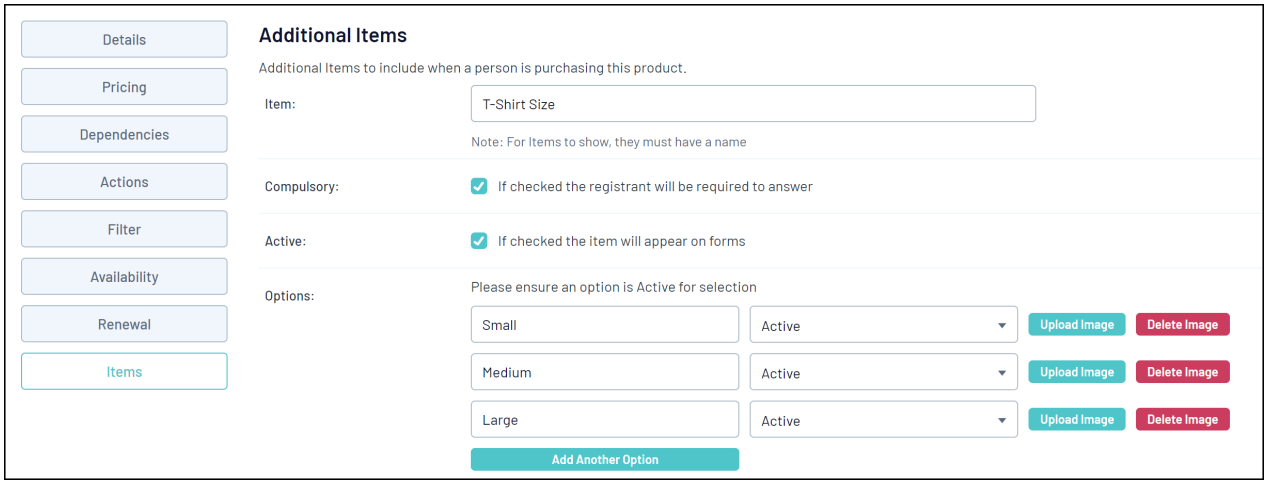
Automatic Reminder Emails: Notify members that have purchased Product A that it will be expiring soon and Product B is available for purchase.

You can also select whether or not to send this renewal email to parents as well as the member themselves (if they have different emails). If you want to send this to parents as well, please tick the S**end Renewal Email to Parents** checkbox.

> **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: Add the question you wish to ask (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 (e.g. Small, Medium, Large)

4. Once you've finished creating your product, click **Update**