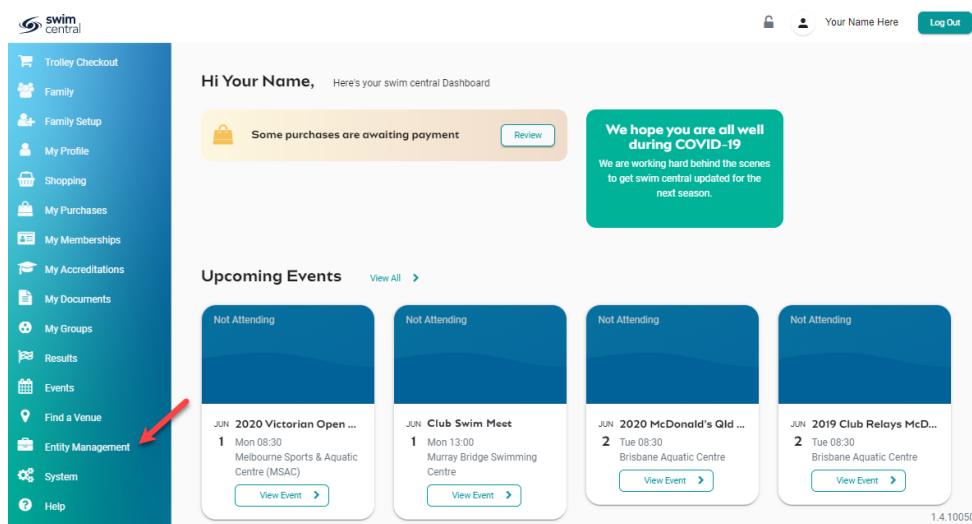


HOW TO REQUIRE DOCUMENTS FOR PRODUCT PURCHASES

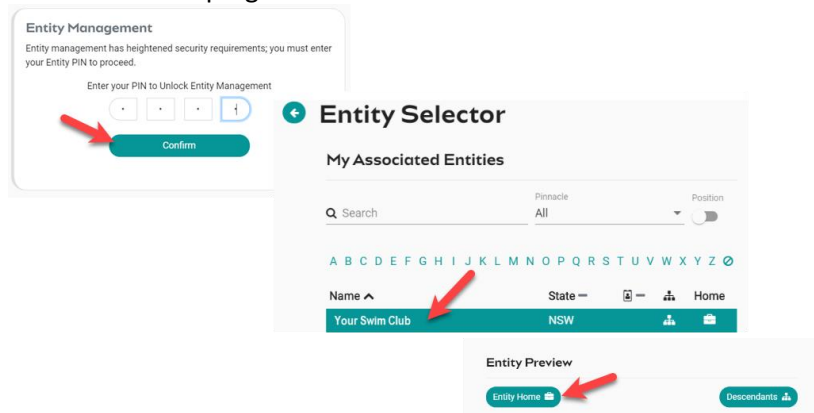
If you would like to monitor who joins your club (due to large member numbers or squad restrictions, for example), your Club can impose a document upload requirement for members when purchasing a membership product. This document requires approval before the purchase is finalised, thereby allowing you to approve/deny the purchase of the membership.

This help guide is for Club Administrators to attach a document requirement to a membership product you have already set up. If you have not set up the membership product, please see the **How to Set Up New Membership Products** help guide.

From your personal dashboard, select **Entity Management**

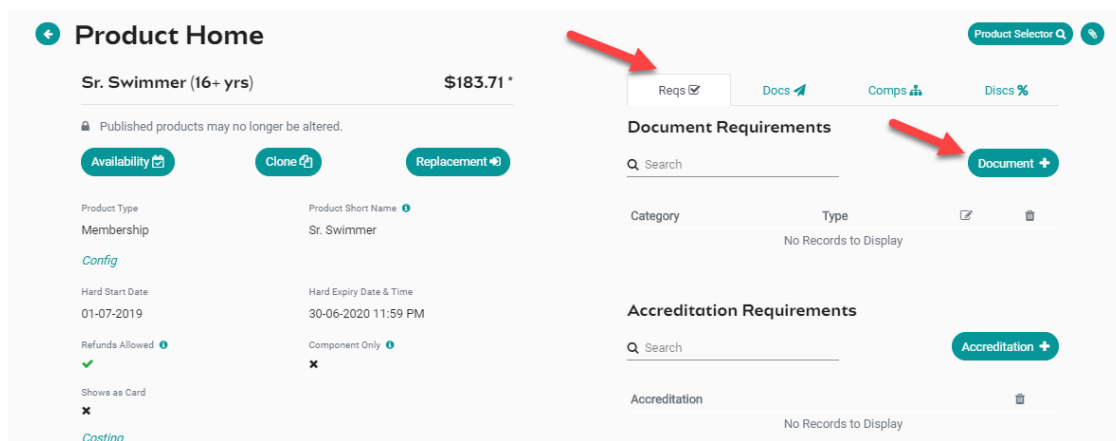


Enter your entity PIN and select **Confirm**, highlight/select your Club, and then select **Entity Home** from near the top right-hand side of the screen.



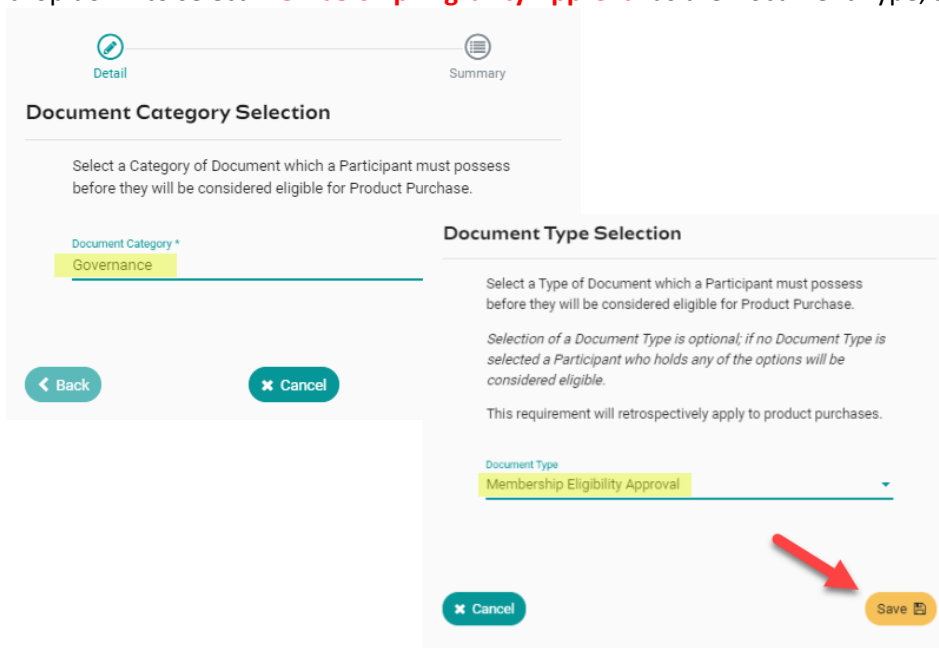
Access the *Product Selector* by clicking on the **Product** icon in your entity home. Here you can view a list of your Club's current products and select the one you wish to attach a document requirement to.

From *Product Home*, select the requirements tab and select **Document +**. ***Please make sure you are on the 'Reqs' tab and not the 'Docs' tab. The 'Docs' tab is for sending documents to the members who purchase this product.***

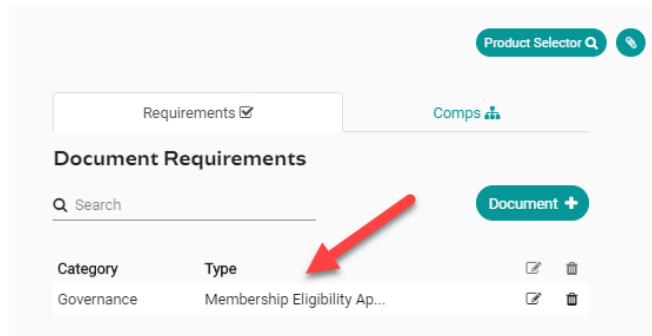


Use the drop down to select **Governance** as the Document Category, select **Next** to confirm the selection and then select **Save**.

Use the drop down to select **Membership Eligibility Approval** as the Document Type, select **Save**



You now have a document requirement on your product that a member must hold for their product purchase to be approved and finalized.



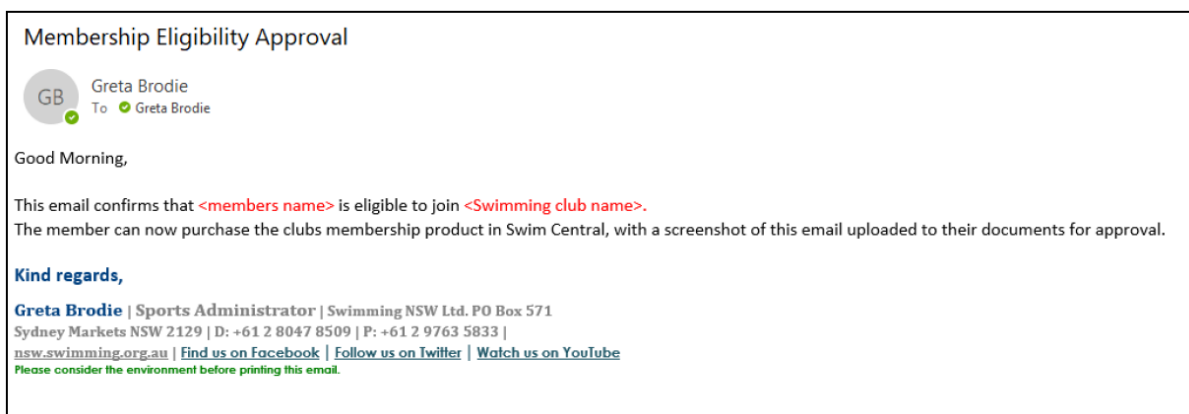
Ensure the product is available for purchase by checking the toggle located on *Availability on Product Home*.

**If you have more than one product for purchase (e.g. Swimmer, Swimmer Competitive, Swimmer Winter, etc.) ensure you add this document requirement to each product where you want to track membership purchases.

WHAT DOCUMENT DO I NEED TO PROVIDE MY MEMBERS WITH?

The document you require your member to upload is up to your club, the only hard rule is that when they upload the document, they select the correct document category (Governance) and document type (membership eligibility approval). The membership isn't finalized until your club approves the document, so your club makes the decision if it is the correct document.

Some clubs may choose to use something as simple as a screenshot of an e-mail that confirms the member is eligible. For example:

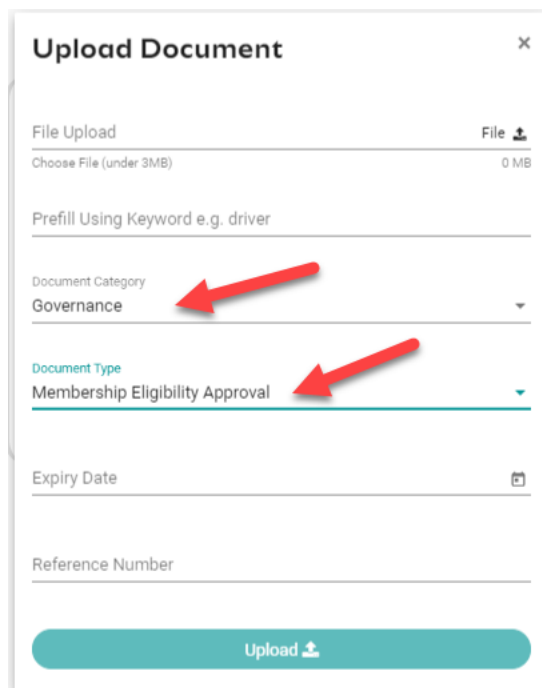


WHAT DO NEW MEMBERS NEED TO DO?

When a new member attempts to purchase a membership product with your club through the Shopping icon, they will be notified that they need a 'Membership Eligibility Approval' document to be able to add the product to the trolley for purchase.

From the dashboard home screen of the person the membership is being purchased for (i.e., adult swimmers in their own profile, child/dependant swimmers in the child/dependant profile), select **My Documents**.

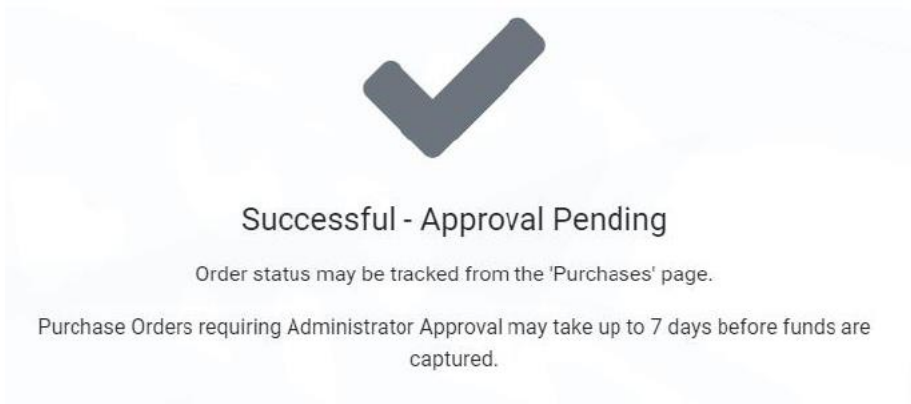
Select **Add Document** then using the drop downs, select **Governance** as the Document Category and select Membership Eligibility Approval as the **Document Type**. *If your club requires a new Membership Eligibility approval each season, this date should be the last day of the season for which the membership is eligible. If the member can continue to use this document for future renewals, the expiry date can be left blank.*



Select **Upload**

Once the document is uploaded, click back on page and they will go back to product purchase.

The member now meets the requirements for the product and can proceed with payment. Once payment is made; the member will receive the following message that the approval of their purchase is pending.



APPROVAL OF THE DOCUMENT AND NEW MEMBERSHIP

Once your member has completed the purchase for their membership product, this will not be finalised until your club approves the document in Swim Central (as above)

From your Club's *Entity Home* screen, select **Approvals** then select **Purchases**

The name of the purchaser and the date of purchase will appear. Please note that if the new member is under 18, the name that appears here will be their guardian/parent member.

Select the **name of the purchaser** then select **Documents**

A list of all documents uploaded for the member for whom the membership was purchased, and their status will appear. Select the **Membership Eligibility Approval** document.

This document can be viewed to check that it is correct by clicking the download button. Providing that the document is correct, select **Verify**. The green tick will indicate that the document is now verified, and the member is now approved for the purchased membership.

When the member accesses their purchases, the purchase will show as a completed transaction.