Products with a Document Requirement
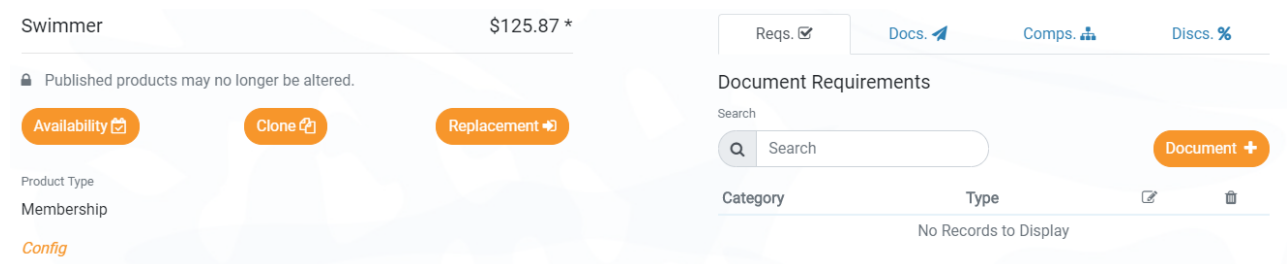
- **Adding a document requirement on products**
- **Providing members with a document**
- **Steps for Members**
- **Approval of document & product purchase**

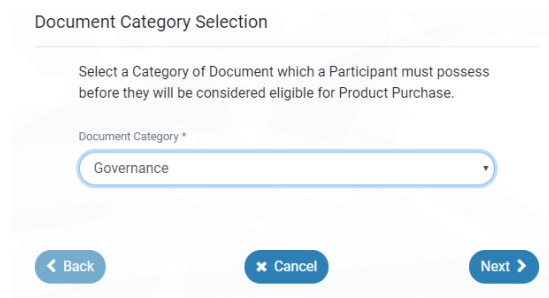## Adding a Document Requirement for membership products

If you are required to monitor who joins your club (due to large members or squad restriction, for example), your club has the ability to impose a document requirement for members when purchasing membership products. This document requires approval before the purchase is finalized, thereby allowing you to approve/deny purchases.

In order to follow this process, you must already have a product set-up in Swim Central. For step by step instructions on how to do this, **click here.**
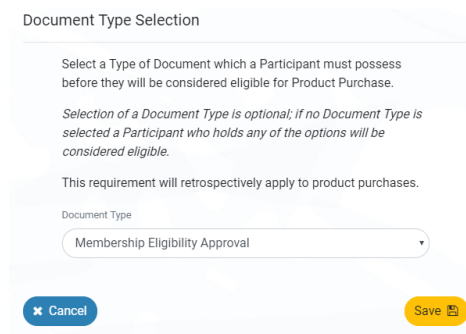
Access your products in your Entity. Once your product is set-up in Swim Central, click on the '*Requirements*' tab on the right-hand side of the page and click *'Document +'.*
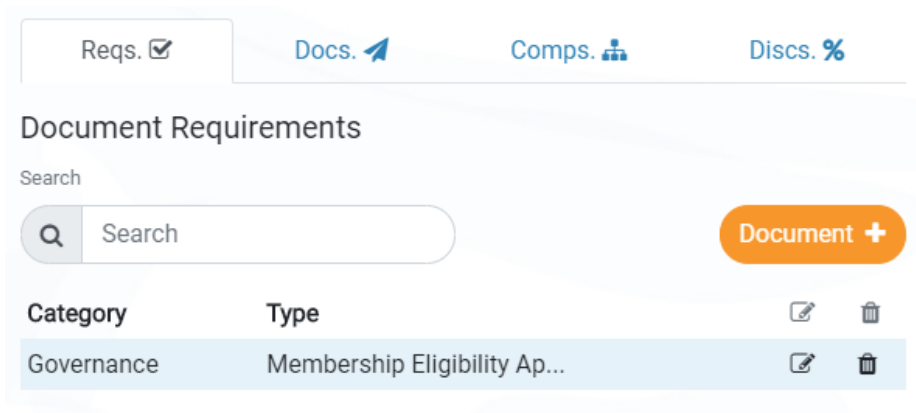(Ensure you access the requirements tab, not the documents tab).

Select the Document Category: *Governance* & Save

Document Type: *Membership Eligibility Approval* & Save

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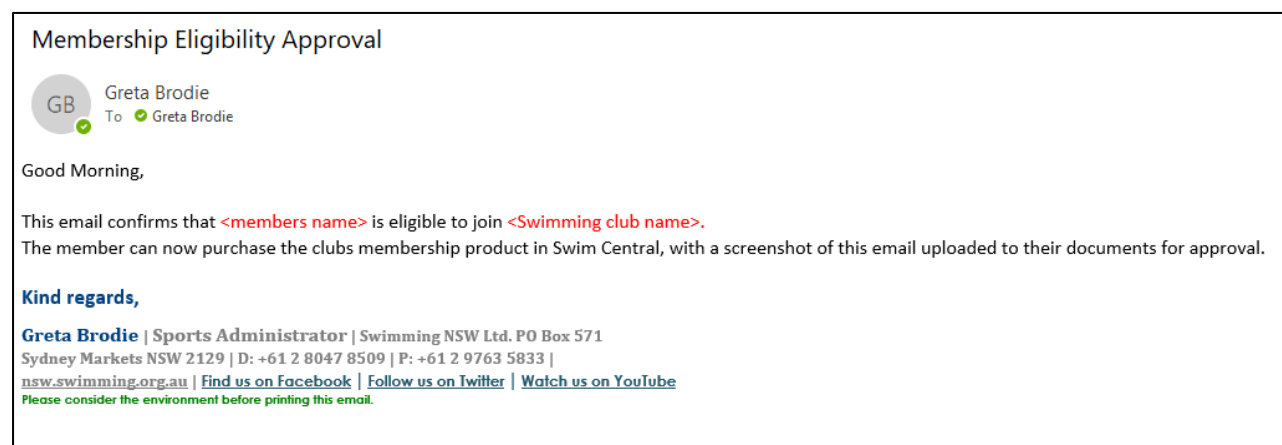

Ensure your product is available for purchase.

*If you have more than one product for purchase (e.g. Swimmer, Swimmer Competitive, Swimmer Winter), ensure you add this document requirement to each product. Or you can choose to only add a document requirement to certain products.

What document do I need to provide my members with?
The document you require your member to upload is up to your club, so long as when uploading they select the correct category and type (as below). The membership isn't finalized until your club approves the document anyway, so your club makes the decision if it is the correct document.
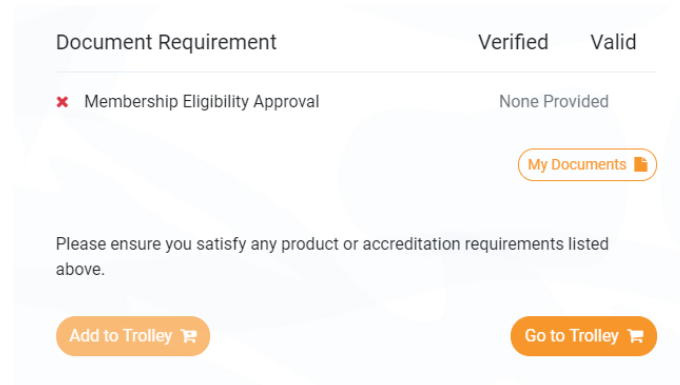
Swimming NSW recommends using something as simple as a screenshot of an email, which confirms the swimmer is eligible. Example below:

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.
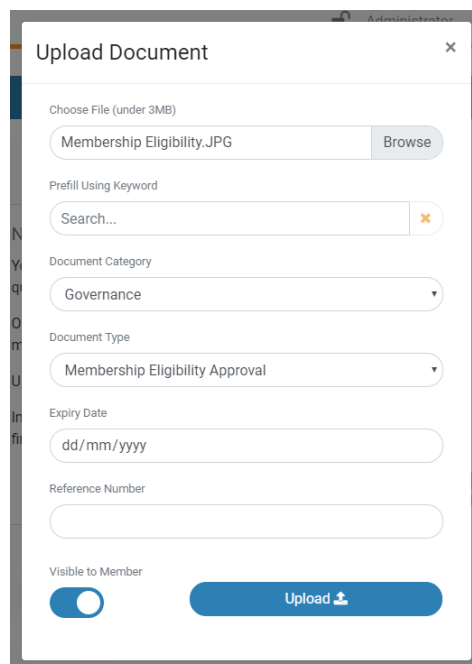
Click on *My Documents*

This will take the member to their document library, where they can upload their 'Membership Eligibility Approval' document (as mentioned above).

Document Category: Governance

Document Type: Membership Eligibility Approval

Expiry Date: If your club requires a new Membership Eligibility approval each season, this date should be the last day of the current season (e.g. 30/09/19). If the member can continue to use this document for future renewals, the expiry date can be left blank.

Reference Number: Can be left blank, unless your club wishes to have a reference number for the document
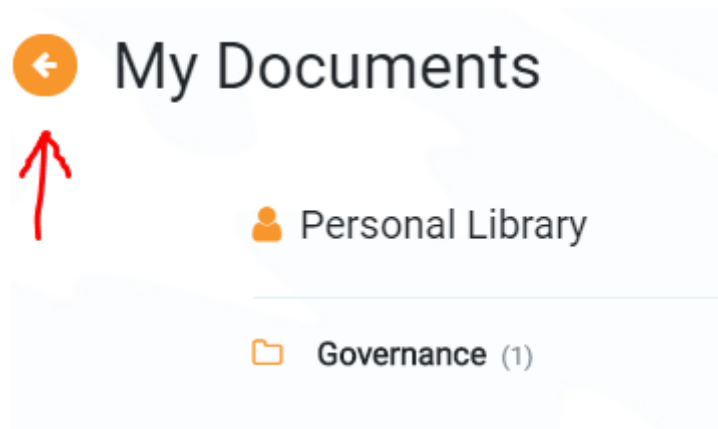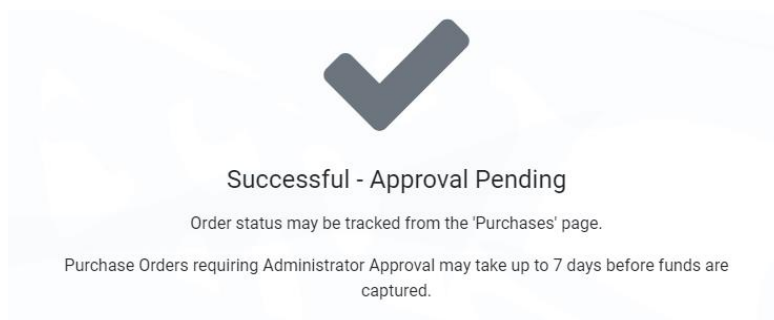
Once the document is uploaded, click back on page, which will take you back to your product purchase.

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.
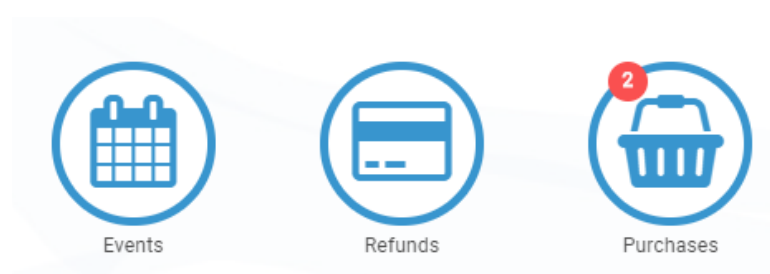
Approval of the Document & New Membership

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

Access your club's entity in Swim Central and click the *Approvals* tile.

And then *Purchases*

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

Click *Documents*

A list of all documents uploaded by the participant & their status will appear. Click on the correct document.

The document can be viewed to check it is eligible, by clicking the download button. Providing document is correct, click *Verify*.

The green tick indicates the document is now verified.

When the member accesses their purchases, the purchase should now be completed.