



Create a product

Last Modified on 11/08/2023 12:21 pm AEST

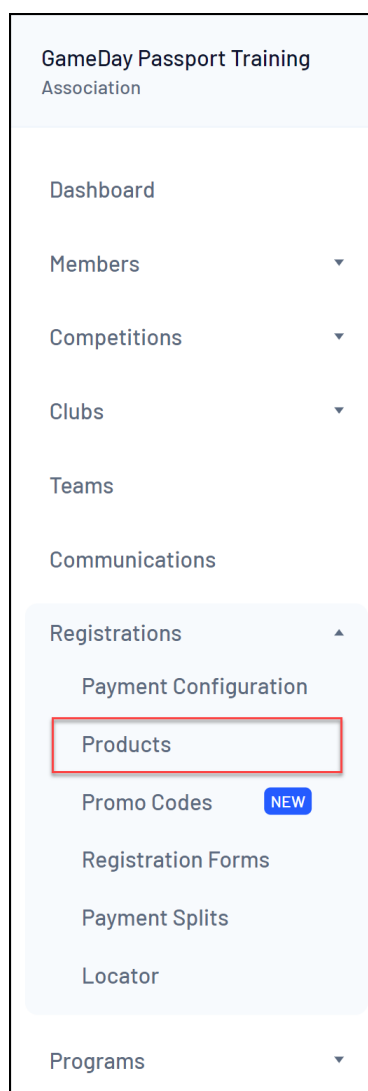
Firstly, login to your [Online Membership Database](#) - If you don't have your login details please contact your State Governing Body or Association.

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 Group or Stats, and you can search for products using the Product Name search field

Products

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

Group

Active

Select an O...

	Name	Price	Active ?	Created By	Split Name	Copy Product
Group: Association Fees (9 products)						
	2022/2023 Age 06 Membership Fee	50.00	<input checked="" type="checkbox"/>	Association	100 per cent to Association	Copy
	2022/2023 Age 06 Membership Fe...	50.00	<input checked="" type="checkbox"/>	Association	100 per cent to Association	Copy
	2022/2023 Age 07 Membership Fee	50.00	<input checked="" type="checkbox"/>	Association	100 per cent to Association	Copy
	2022/2023 Age 08 Membership Fee	50.00	<input checked="" type="checkbox"/>	Association	100 per cent to Association	Copy
	2022/2023 Age 10 Membership Fee	50.00	<input checked="" type="checkbox"/>	Association	100 per cent to Association	Copy

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

Products

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

Group

Active

Select an O...

	Name	Price	Active ?	Created By	Split Name	Copy Product
Group: Association Fees (9 products)						
	2022/2023 Age 06 Membership Fee	50.00	<input checked="" type="checkbox"/>	Association	100 per cent to Association	Copy
	2022/2023 Age 06 Membership Fe...	50.00	<input checked="" type="checkbox"/>	Association	100 per cent to Association	Copy
	2022/2023 Age 07 Membership Fee	50.00	<input checked="" type="checkbox"/>	Association	100 per cent to Association	Copy
	2022/2023 Age 08 Membership Fee	50.00	<input checked="" type="checkbox"/>	Association	100 per cent to Association	Copy
	2022/2023 Age 10 Membership Fee	50.00	<input checked="" type="checkbox"/>	Association	100 per cent to Association	Copy

3. Complete any relevant details as below:

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: *

2022/2023 Age 11 Membership Fee

Product Reporting Season:

2023

(Used in Reporting as a filter for Products purchased)

Archive Product:

☐

Grouping Category:

Association Fees

Product Type: *

Membership

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 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.

Details

Pricing

Dependencies

Actions

Filter

Availability

Renewal

Items

Pricing

Fields marked with * are compulsory.

Tax Description: *

Inclusive

Please include either "Inclusive", "Exclusive", "Not Applicable" as the tax descriptor.

Minimum System Login to change price:

Select Level

Minimum System Login to Sell Product:

Select Level

Price:

☒ Single price (price is the same across all registrations, including family registrations).
☐ Multiple prices (changes in the case of multiple, family, registrations.)

Single Pricing:

\$ 50.00

Payment Split: *

100 per cent to Association

Who the money is sent to upon successful online transaction

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:

Multiple Pricing:

First Adult	\$ 50	First Child	\$ 50
Second Adult	\$ 40	Second Child	\$ 40
Third Adult	\$ 30	Third Child	\$ 30
Subsequent Adult	\$ 20	Subsequent Child	\$ 20

Even if you are only accepting one type (adult or children) please add pricing to both columns to ensure that the correct amount is visible in all areas of the system and for safety if this product is added to an adult form.

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.

Details

Pricing

Dependencies

Actions

Filter

Availability

Renewal

Items

Mandatory Products

Fields marked with * are compulsory.

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.

Mandatory Products:

☐ 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

Update

[Click here](#) to return to product 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.

Details

Pricing

Dependencies

Actions

Filter

Availability

Renewal

Items

Actions to perform on successful payment

Fields marked with * are compulsory.

Set Product Expiry: to

31

Dec

2023

 (dd-mon-yyyy)

or

for (days from product purchase)

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: 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.

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: Any

Minimum DOB: 1 Jan 2012
[Older end of Date Range \(eg 01 - Jan - 1970\)](#)

Maximum DOB: 31 Dec 2012
[Younger end of Date Range \(eg 31 - Dec - 2000\)](#)

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

Maximum Age: Any
(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: 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.

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.

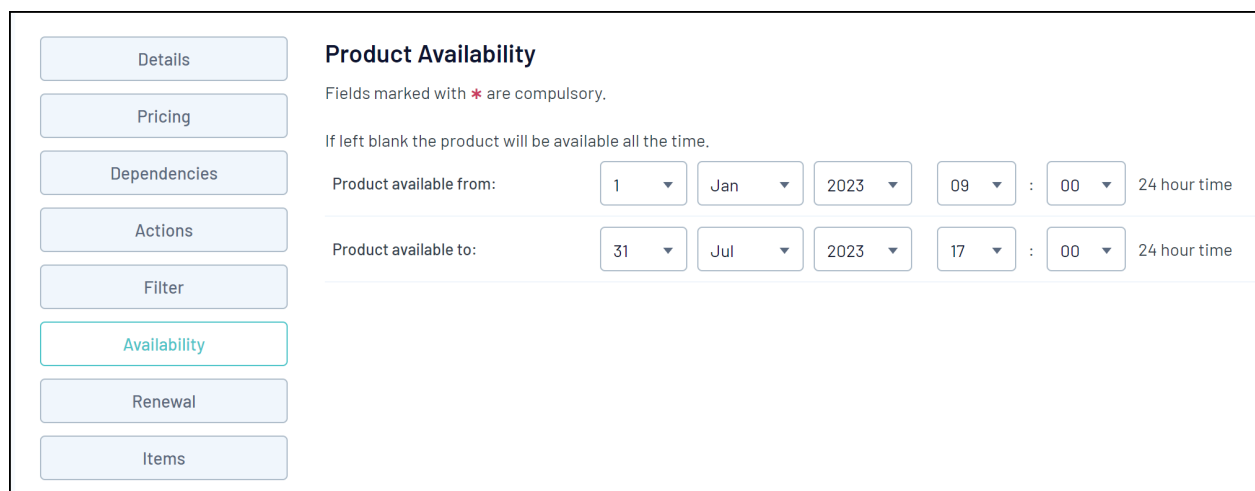
Minimum/Maximum Age: Apply an age range to ensure the product only shows to members whose date of birth places them within that age range at the time of registration.

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**.



The screenshot shows the 'Product Availability' tab selected in a sidebar menu. The main content area is titled 'Product Availability' and includes a note: 'Fields marked with * are compulsory.' Below this, a instruction states: 'If left blank the product will be available all the time.' The form contains two rows of date and time pickers. The first row is labeled 'Product available from:' and has dropdowns for '1', 'Jan', '2023', '09', and '00', followed by a '24 hour time' label. The second row is labeled 'Product available to:' and has dropdowns for '31', 'Jul', '2023', '17', and '00', followed by a '24 hour time' label. The sidebar menu on the left includes buttons for 'Details', 'Pricing', 'Dependencies', 'Actions', 'Filter', 'Availability' (highlighted), 'Renewal', and 'Items'.

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

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:

Association Fees - 2022/2023 Age 11 Membership Fee

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:

Email this message days the product is due to expire:

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 **Send 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.

Details

Pricing

Dependencies

Actions

Filter

Availability

Renewal

Items

Additional Items

Additional Items to include when a person is purchasing this product.

Item:

Note: For Items to show, they must have a name

Compulsory: ☒ If checked the registrant will be required to answer

Active: ☒ If checked the item will appear on forms

Options: Please ensure an option is Active for selection

<input type="text" value="Small"/>	<input type="text" value="Active"/>	<input type="button" value="Upload Image"/>	<input type="button" value="Delete Image"/>
<input type="text" value="Medium"/>	<input type="text" value="Active"/>	<input type="button" value="Upload Image"/>	<input type="button" value="Delete Image"/>
<input type="text" value="Large"/>	<input type="text" value="Active"/>	<input type="button" value="Upload Image"/>	<input type="button" value="Delete Image"/>

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**
