

Membership Setup

User Guide for JustGo

[Click here](#) *for video tutorial*

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What is Membership Setup?

Membership Setup allows for sophisticated membership configuration so that Clubs can personalise each membership category if required.

Using branding and purchasing rules you can create as many memberships as you like for your club and only display the relevant ones to each member.

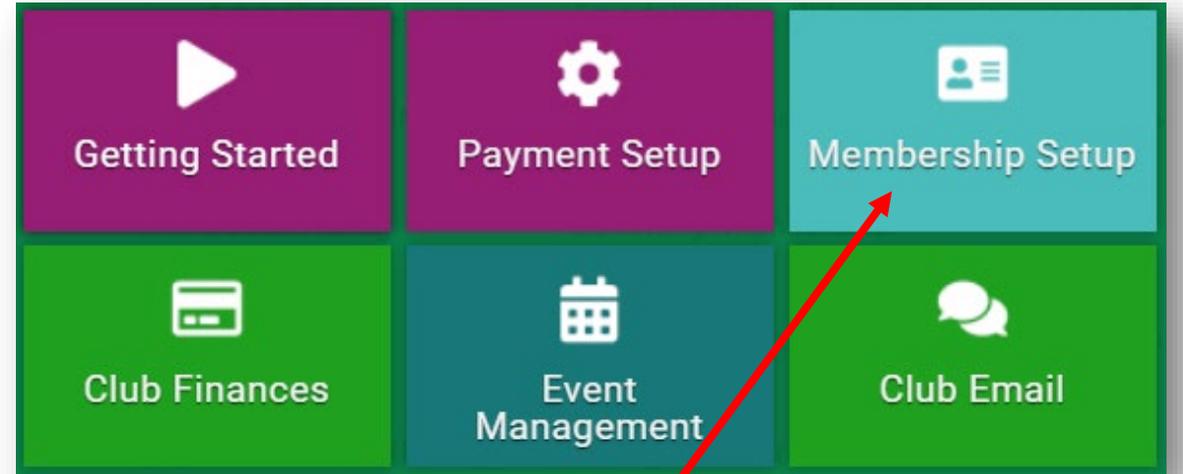
The five Swim Wales Club membership categories are pre-loaded, but you can amend the colour, wording, benefits and how the price is displayed at your discretion.

Club - Competitive	Club - Training	Club - Coach
£0	£0	£0
Benefits <ul style="list-style-type: none">• Manage your personal online JustGo membership profile• Swim Wales Member Insurance cover & National Governing Body support• Access to Swim Wales licensed Competitions & approved competitions outside Wales• Access to CPD...	Benefits <ul style="list-style-type: none">• Manage your personal online JustGo membership profile• Swim Wales Member Insurance cover & National Governing Body support• Access to CPD opportunities, Training & Development Courses• Access to Safeguarding & Protecting Children...	Benefits <ul style="list-style-type: none">• Manage your personal online JustGo membership profile• Swim Wales Member Insurance cover & National Governing Body support• Access to DBS checks• Access to SW licensed Competitions & approved competitions outside Wales...
1 Year Membership	1 Year Membership	1 Year Membership
More info	More info	More info

Some screenshots and info in this guide may differ depending on subscription type.

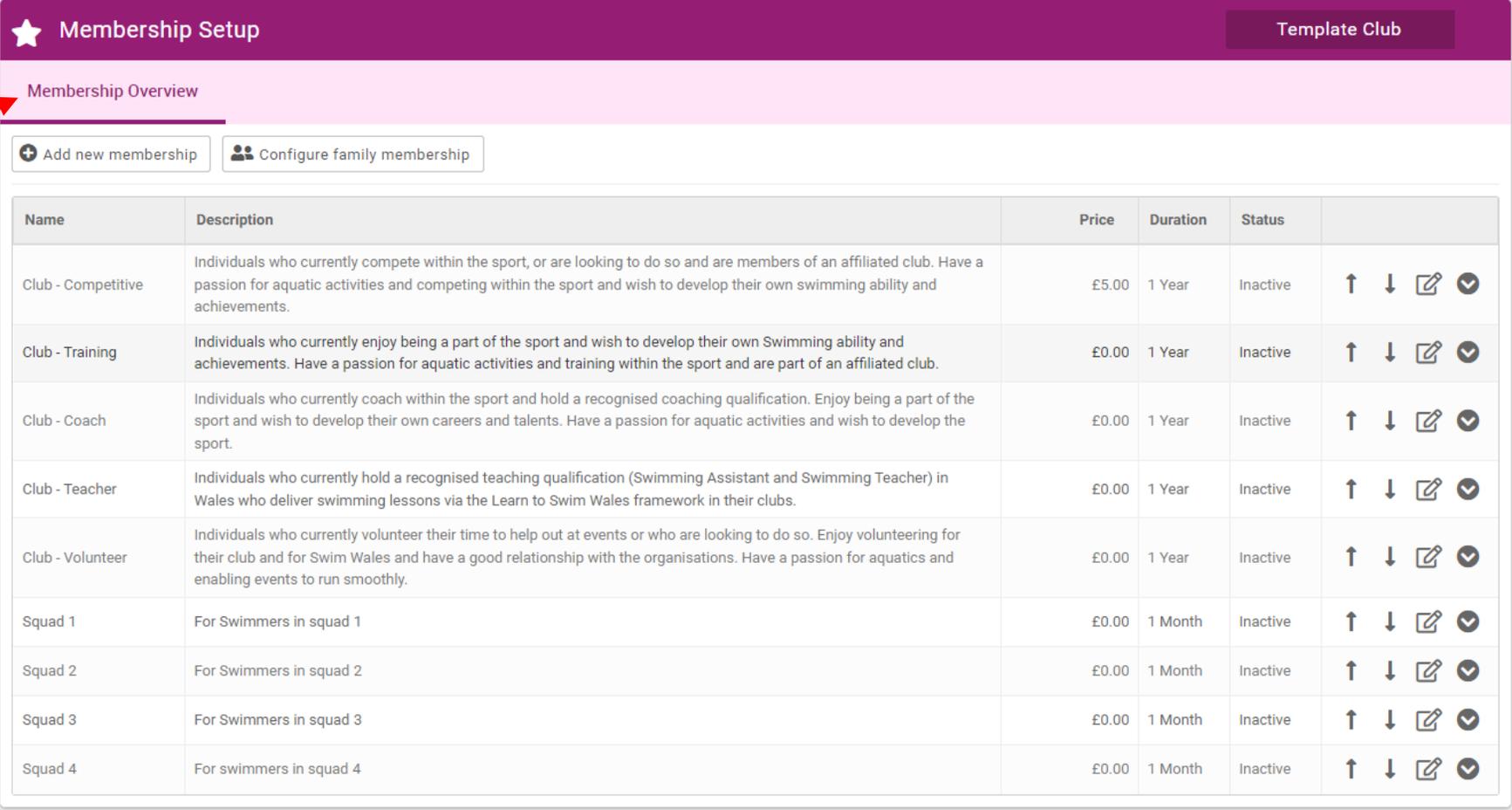
How do I access Membership Setup?

Once you are logged in as a Club admin, the Membership Setup tile will be found in your Menu.



What memberships have been setup for my club already?

From the Membership Overview, you can see all the available memberships for your club members.



The screenshot shows the 'Membership Setup' interface for a 'Template Club'. A red arrow points to the 'Membership Overview' tab. Below the tab are two buttons: 'Add new membership' and 'Configure family membership'. The main content is a table with columns for Name, Description, Price, Duration, Status, and action icons.

Name	Description	Price	Duration	Status	
Club - Competitive	Individuals who currently compete within the sport, or are looking to do so and are members of an affiliated club. Have a passion for aquatic activities and competing within the sport and wish to develop their own swimming ability and achievements.	£5.00	1 Year	Inactive	↑ ↓ ✎ ✓
Club - Training	Individuals who currently enjoy being a part of the sport and wish to develop their own Swimming ability and achievements. Have a passion for aquatic activities and training within the sport and are part of an affiliated club.	£0.00	1 Year	Inactive	↑ ↓ ✎ ✓
Club - Coach	Individuals who currently coach within the sport and hold a recognised coaching qualification. Enjoy being a part of the sport and wish to develop their own careers and talents. Have a passion for aquatic activities and wish to develop the sport.	£0.00	1 Year	Inactive	↑ ↓ ✎ ✓
Club - Teacher	Individuals who currently hold a recognised teaching qualification (Swimming Assistant and Swimming Teacher) in Wales who deliver swimming lessons via the Learn to Swim Wales framework in their clubs.	£0.00	1 Year	Inactive	↑ ↓ ✎ ✓
Club - Volunteer	Individuals who currently volunteer their time to help out at events or who are looking to do so. Enjoy volunteering for their club and for Swim Wales and have a good relationship with the organisations. Have a passion for aquatics and enabling events to run smoothly.	£0.00	1 Year	Inactive	↑ ↓ ✎ ✓
Squad 1	For Swimmers in squad 1	£0.00	1 Month	Inactive	↑ ↓ ✎ ✓
Squad 2	For Swimmers in squad 2	£0.00	1 Month	Inactive	↑ ↓ ✎ ✓
Squad 3	For Swimmers in squad 3	£0.00	1 Month	Inactive	↑ ↓ ✎ ✓
Squad 4	For swimmers in squad 4	£0.00	1 Month	Inactive	↑ ↓ ✎ ✓

How do I update my club's memberships?

Below are the editable fields. They are preloaded with Swim Wales information for each category. If your club offers additional membership options you can amend the details if you wish. Please leave unchanged if you do not.

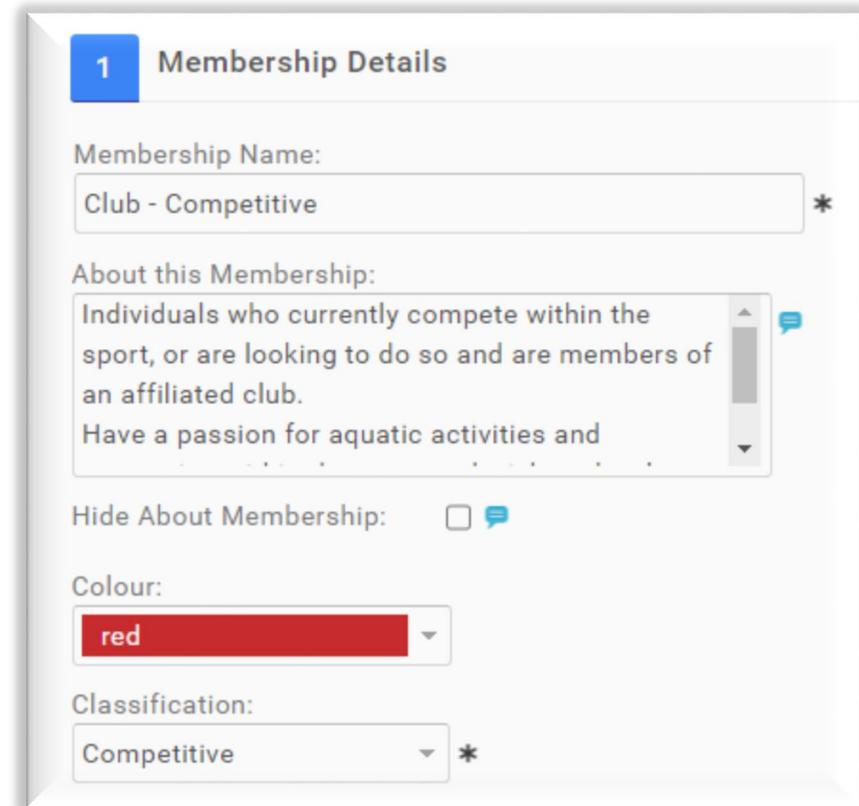
Membership Name is the name of that is presented to the member.

About this Membership will appear to the member as a description, so give this some thought if altering.

The **Hide About Membership** tick box allows you to hide the More Info option displayed to the member

Classification is a drop down list aligning your membership type with Swim Wales. Allowing the system to split the fee between the Club and NGB.

DO NOT alter the classification for Swim Wales memberships.



The screenshot shows a form titled "1 Membership Details". It contains the following fields and options:

- Membership Name:** A text input field containing "Club - Competitive" with an asterisk indicating it is required.
- About this Membership:** A text area containing the text "Individuals who currently compete within the sport, or are looking to do so and are members of an affiliated club. Have a passion for aquatic activities and".
- Hide About Membership:** A checkbox that is currently unchecked, with a speech bubble icon next to it.
- Colour:** A dropdown menu showing "red" with a red background and a downward arrow.
- Classification:** A dropdown menu showing "Competitive" with an asterisk indicating it is required.

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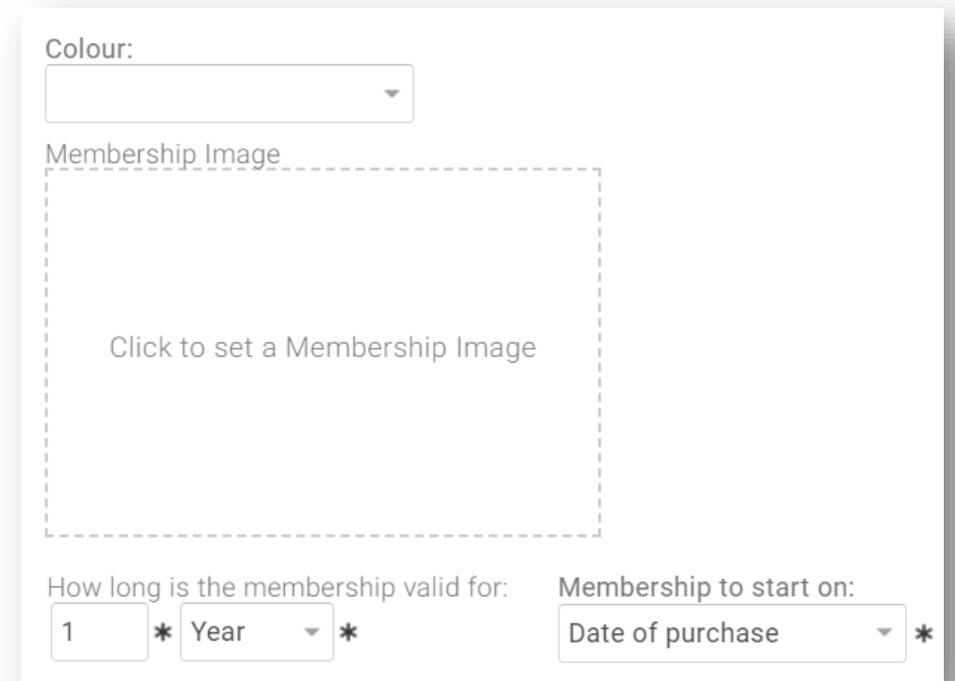
How do I update my club's memberships?

Below are the editable fields. They are preloaded with Swim Wales information for each category. If your club offers additional membership options you can amend the details if you wish. Please leave unchanged if you do not.

Membership Image allows you to set/update the image displayed on the membership.

How long is the membership valid for allows you to specify the duration of the membership.

Membership to start on allows you to set the start period of the membership. If you set duration to 1 year. The expiry will be one day before the start date you set.



The screenshot shows a form with the following fields:

- Colour:** A dropdown menu.
- Membership Image:** A dashed box containing the text "Click to set a Membership Image".
- How long is the membership valid for:** A field with the value "1", an asterisk, a dropdown menu with "Year" selected, and another asterisk.
- Membership to start on:** A dropdown menu with "Date of purchase" selected and an asterisk.

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How do I update my club's memberships?



Club - Competitive



Club - Coach



Club - Teacher

Example
Membership
images for
each category



Club - Training



Club - Volunteer

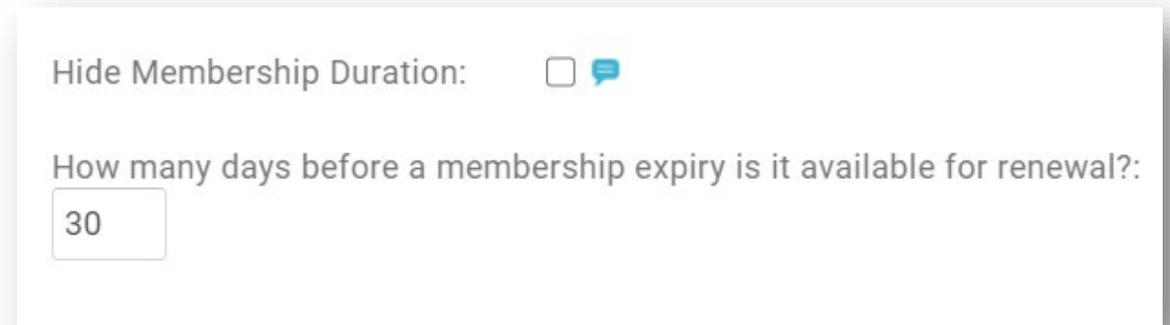
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How do I update my club's memberships?

Below are the editable fields. They are preloaded with Swim Wales information for each category. If your club offers additional membership options you can amend the details if you wish. Please leave unchanged if you do not.

Hide Membership Duration tick box allows you to choose to hide the duration of the membership from the member at the time of purchase.

How many days before a membership expiry is it available for renewal allows you to restrict members from renewing this specific membership until a specific time.

A screenshot of a web form for membership setup. It features two fields: a checkbox labeled 'Hide Membership Duration:' with a blue speech bubble icon to its right, and a text input field labeled 'How many days before a membership expiry is it available for renewal?' containing the number '30'.

Hide Membership Duration: 

How many days before a membership expiry is it available for renewal?:

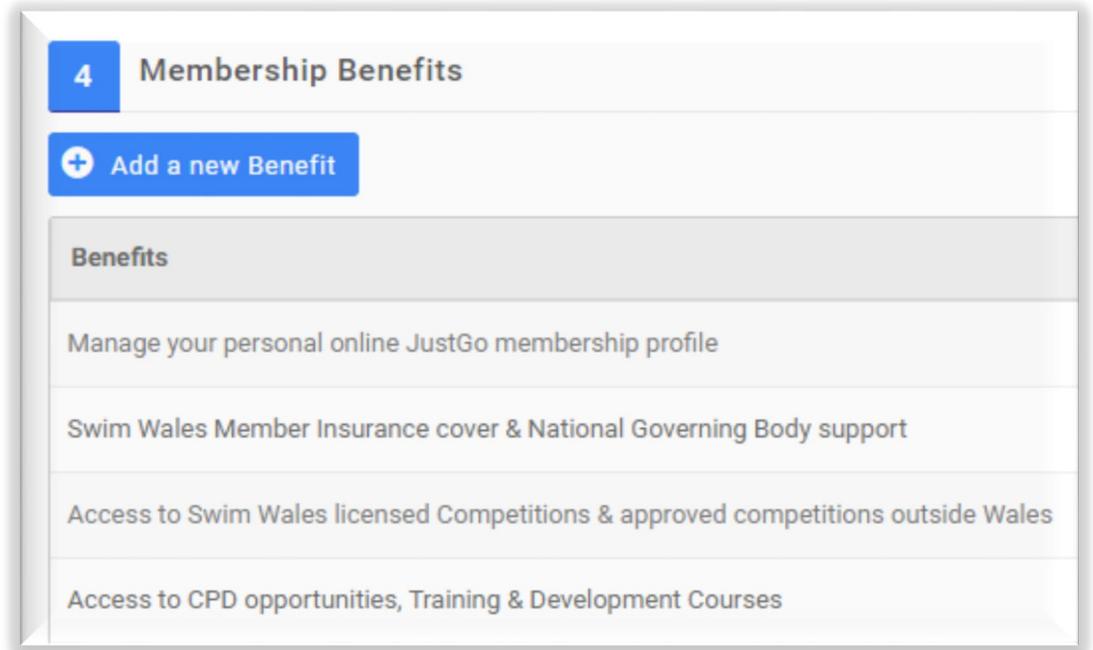
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How do I update my club's memberships?

Below are the editable fields. They are preloaded with Swim Wales information for each category. If your club offers additional membership options you can amend the details if you wish. Please leave unchanged if you do not.

Benefits allows you to add the benefits of the Membership and are displayed to the member before purchase.

You can add benefits using the Add a new Benefit button and typing free text into the box.



The screenshot shows a user interface for managing membership benefits. At the top, there is a blue header with the number '4' and the text 'Membership Benefits'. Below the header is a blue button with a plus sign and the text 'Add a new Benefit'. Underneath the button is a section titled 'Benefits' with a light gray background. This section contains a list of five preloaded benefits, each in a separate row with a light gray background:

- Manage your personal online JustGo membership profile
- Swim Wales Member Insurance cover & National Governing Body support
- Access to Swim Wales licensed Competitions & approved competitions outside Wales
- Access to CPD opportunities, Training & Development Courses

Adding Pricing Details

Price allows you to set the price of the Club membership.

Display Price Settings allows you to control what price you would like to show to your members.

Display Alternative Price allows you to show the full price to the members (**Club fee + Swim Wales fee** if applicable) but only receive your part of the amount. **SELECT THIS OPTION**

e.g. In the screenshot, the **Price** (10.00) is how much the club will receive. While the **Displayed Price** (49.00) is the total amount charged for the full membership. E.g:

£ 10.00 (Club Fee) + £ 39.00 (Swim Wales Fee) = £ 49.00

This is a manual process, please refer to Swim Wales membership fee structure for this year's fee.

2 Membership Pricing

Price:
10.00 *

Automatically pro rata price:

Display Price Settings:

- Display Actual Price
- Hide Price
- Display Alternative Price
- Display Price Range

Displayed Price:
49.00

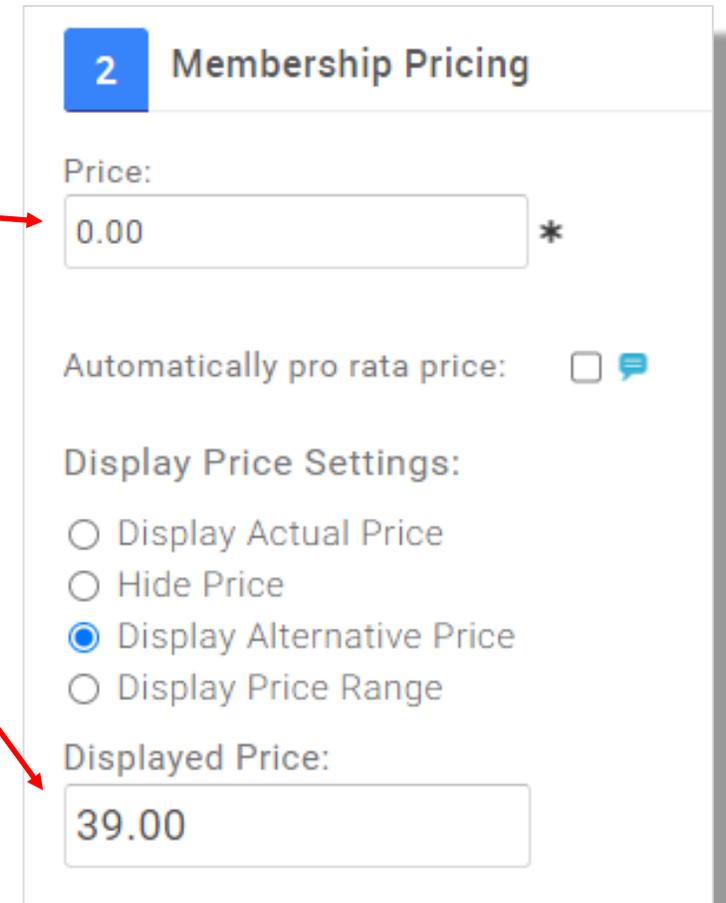
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Adding Pricing Details

If your club does not collect an annual fee, place **0.00** in the top Price field and **39.00** (for *Club-Competitive*) in the Displayed Price field

This is a manual process, please refer to Swim Wales membership fee structure for this year's fee.

Click  to check that the total fee charged to members is correct.



2 Membership Pricing

Price: *

Automatically pro rata price: 

Display Price Settings:

- Display Actual Price
- Hide Price
- Display Alternative Price
- Display Price Range

Displayed Price:

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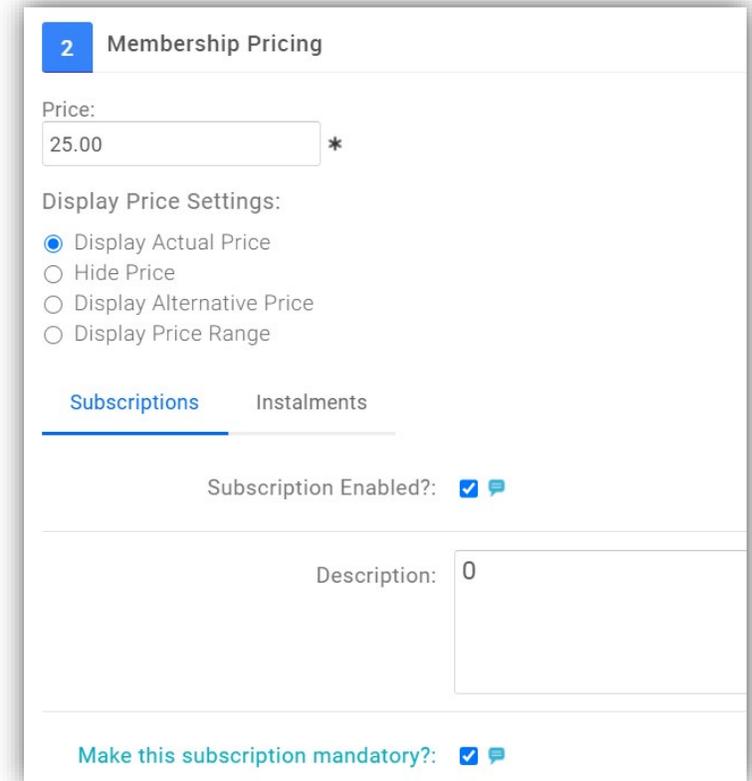
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Adding Pricing Details

Subscriptions allows you to offer auto renewal options to your members.

Description is presented to the member during purchase.

Only available in JustGo Pro.



The screenshot shows a configuration window titled "2 Membership Pricing". It includes a "Price:" field with the value "25.00" and an asterisk. Below this is a "Display Price Settings:" section with four radio button options: "Display Actual Price" (selected), "Hide Price", "Display Alternative Price", and "Display Price Range". There are two tabs: "Subscriptions" (active) and "Instalments". Under the "Subscriptions" tab, there is a "Subscription Enabled?" checkbox which is checked. At the bottom, there is a "Description:" field with the value "0" and a "Make this subscription mandatory?" checkbox which is also checked.

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Adding Pricing Details

Instalments allows you to provide a payment breakdown to your members. (JustGo Pro only)

Description is presented to the member at the time of purchase.

Initial payment value is the up-front amount taken when the member selects this payment method.

Instalment Amount is the value of each instalment.

Frequency/Type determines the period that an instalment will be automatically charged.

Payment Date in this case aligns the date with the original purchase of the membership

The screenshot shows the 'Instalments' configuration form. At the top, there are two tabs: 'Subscriptions' and 'Instalments', with 'Instalments' being the active tab. Below the tabs, there is a section for 'Instalment Enabled?' with a checked checkbox and a speech bubble icon. The next section is 'Description:' followed by a large empty text input field. Below that, there are three rows of input fields: 'Initial payment value:' with a text box containing '10.00', 'Number of instalment payments:' with a text box containing '3', and 'Instalment Amount:' with a text box containing '5.00'. Each of these three rows has a speech bubble icon to its right. The next row is 'Frequency/Type:' with a dropdown menu showing 'Monthly' and a speech bubble icon. The final row is 'Payment Date:' with a dropdown menu showing 'Date of purchase' and a speech bubble icon.

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Adding Pricing Details

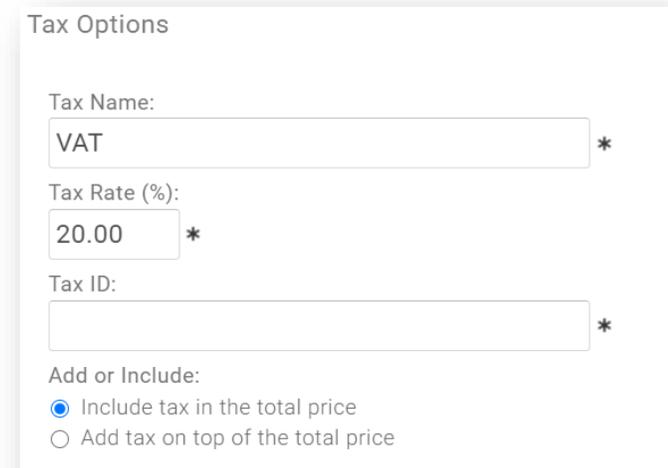
Tax Options are optional and allow you to charge add tax to your memberships if required.

Tax Name allows you to identify the type of tax applied.

Tax Rate allows you to define the rate charged.

Tax ID is an internal reference and used for reporting purposes. It is not visible to members.

Add or Include allows you to select if the taxes are shown as inclusive to the membership price or added to the price.



The screenshot shows a form titled "Tax Options" with the following fields and options:

- Tax Name:** A text input field containing "VAT" with an asterisk (*) to its right.
- Tax Rate (%):** A text input field containing "20.00" with an asterisk (*) to its right.
- Tax ID:** An empty text input field with an asterisk (*) to its right.
- Add or Include:** Two radio button options:
 - Include tax in the total price
 - Add tax on top of the total price

Adding Purchasing Rules

Membership Restrictions, Discounts & Surcharges allow you to set purchasing rules for memberships in order to provide personalisation to the purchase journey.

Restrictions restrict the visibility of the membership to only members who meet the chosen criteria.

Discounts apply discounts for members who meet the chosen criteria.

Surcharge applies a surcharge for members who meet the chosen criteria.

5 Membership Restrictions, Discounts & Surcharges

Restrictions Discounts Surcharges

Use purchasing rules to restrict which group of members are able to buy this membership. combinations, eg. Age Rule & Gender Rule.

+ Add new purchase rule + Add a new custom rule

Description
No records

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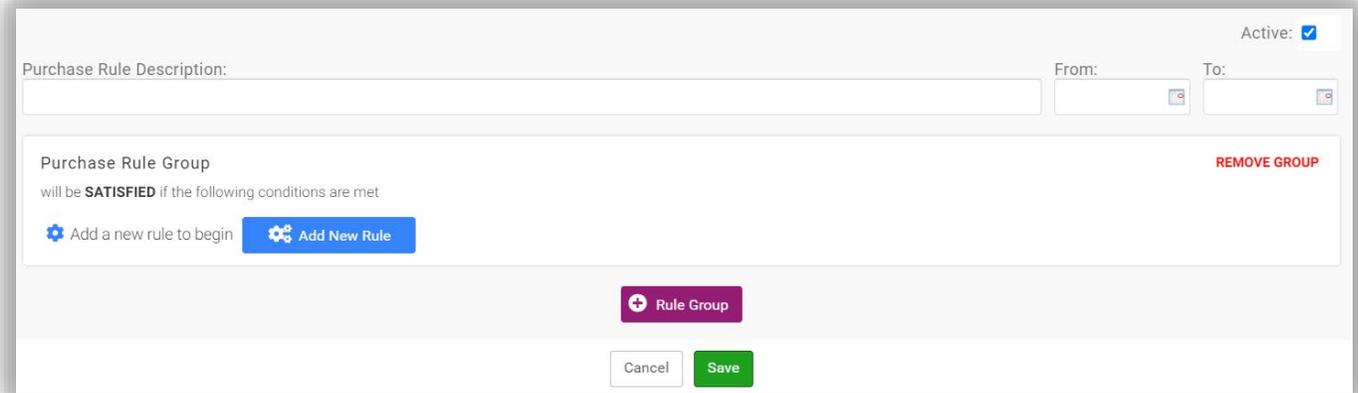
Adding Purchasing Rules

Restrictions

Purchase Rule Description is an internal reference for the rule.

From and **To** set the validity of the rule. The rule will not work outside of these dates.

Click on the **Add New Rule** button to add a standard rule. [Please see the Smart Rules User Guide](#) for assistance.



The screenshot shows a web form for adding a purchasing rule. At the top right, there is a checkbox labeled 'Active:' which is checked. Below this, there are three input fields: 'Purchase Rule Description:', 'From:', and 'To:'. The 'Purchase Rule Description:' field is empty. Below these fields is a section titled 'Purchase Rule Group' with a red 'REMOVE GROUP' link. Underneath, it states 'will be SATISFIED if the following conditions are met'. There are two buttons: 'Add a new rule to begin' (with a gear icon) and 'Add New Rule' (with a gear icon). At the bottom of the form, there are three buttons: 'Cancel', 'Save', and a purple '+ Rule Group' button.

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Adding Purchasing Rules

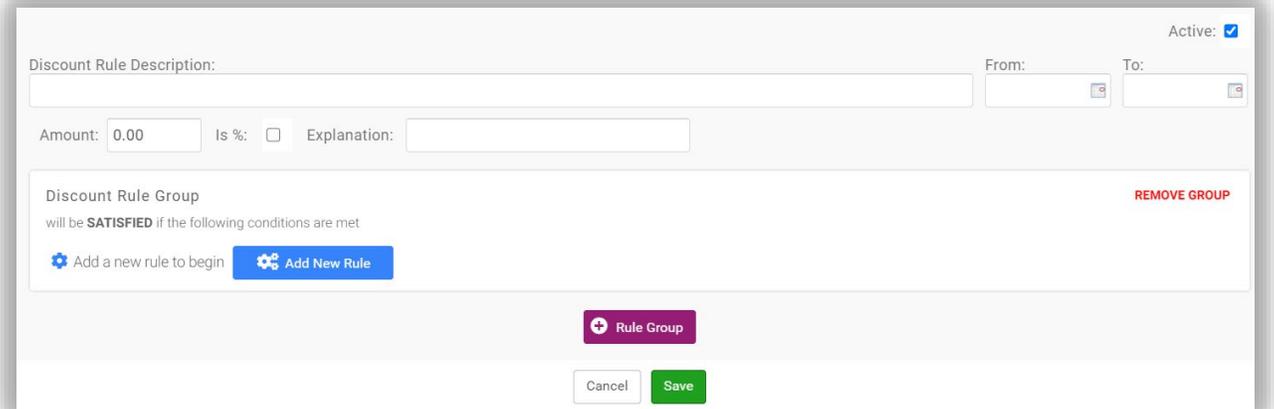
Discounts / Surcharges

Discount/Surcharge Rule Description is an internal reference for the rule.

From and **To** set the validity of the rule. The rule will not work outside of these dates.

Amount is the value of the discount which can be turned into a percentage using the **Is %** tick box.

Explanation is an internal reference for the discount value.



The screenshot shows a web form for adding purchasing rules. At the top right, there is an 'Active:' checkbox which is checked. Below this, there are three input fields: 'Discount Rule Description:', 'From:', and 'To:'. The 'From:' and 'To:' fields have small calendar icons next to them. Below these fields, there are three more input fields: 'Amount:' with the value '0.00', 'Is %:' with an unchecked checkbox, and 'Explanation:'. Below these fields, there is a section titled 'Discount Rule Group' with the text 'will be SATISFIED if the following conditions are met'. To the right of this section is a red 'REMOVE GROUP' link. Below the 'Discount Rule Group' section, there are two blue buttons: 'Add a new rule to begin' and 'Add New Rule'. At the bottom of the form, there is a purple button with a plus sign and the text 'Rule Group'. At the very bottom, there are two buttons: 'Cancel' and 'Save'.

Advanced Membership Journey

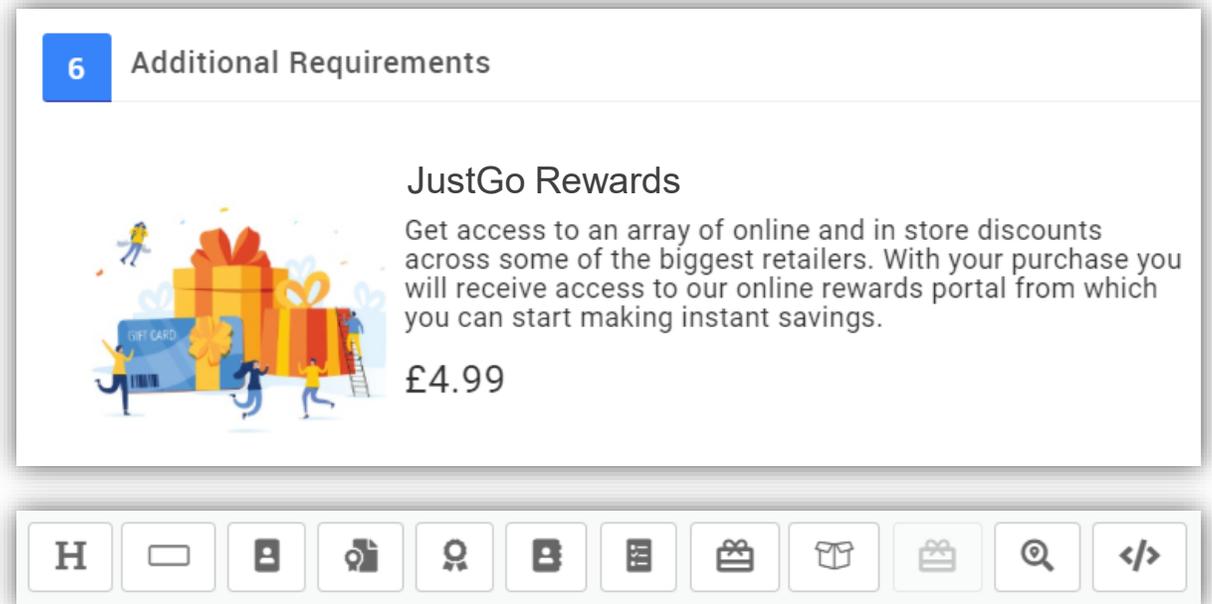
Additional Requirements allow you to take your membership one step further with advanced personalisation.

Create Headers and sections for additional info.

Collect a profile picture, qualifications or additional data during purchase.

You can even include upsell products such as the rewards scheme seen in the image.

Only available in JustGo Pro.

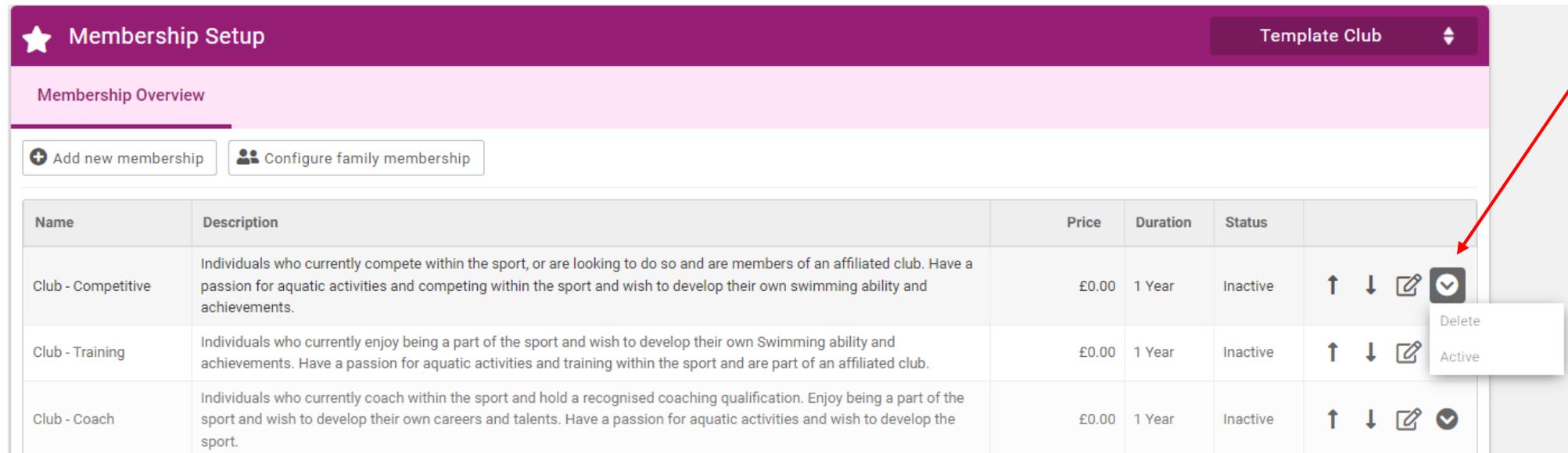


The screenshot shows a step in a membership journey titled "6 Additional Requirements". It features an illustration of gift boxes and a gift card. The offer is for "JustGo Rewards" at a price of "£4.99". The text describes the benefits: "Get access to an array of online and in store discounts across some of the biggest retailers. With your purchase you will receive access to our online rewards portal from which you can start making instant savings." Below the main content is a toolbar with various icons for editing the page, including a header icon (H), a text box icon, a profile icon, a document icon, a ribbon icon, a person icon, a list icon, a gift icon, an open box icon, a gift box icon, a magnifying glass icon, and a code icon (</>).

How do I activate my memberships?

A membership can be activated by using the Active button. The membership can be also edited, deleted and the position of the membership on the member facing page can be edited using the icons below.

Note: If a membership has been purchased you can only make it inactive because of its link to the member who purchased it.



The screenshot shows the 'Membership Setup' interface. At the top, there is a purple header with a star icon and the text 'Membership Setup'. To the right of the header is a dropdown menu labeled 'Template Club'. Below the header is a pink bar with the text 'Membership Overview'. Underneath are two buttons: '+ Add new membership' and 'Configure family membership'. The main content is a table with the following columns: Name, Description, Price, Duration, Status, and a column of action icons. A red arrow points to the 'Active' button in the action icons column for the 'Club - Competitive' membership.

Name	Description	Price	Duration	Status	
Club - Competitive	Individuals who currently compete within the sport, or are looking to do so and are members of an affiliated club. Have a passion for aquatic activities and competing within the sport and wish to develop their own swimming ability and achievements.	£0.00	1 Year	Inactive	↑ ↓ ✎ ⌵
Club - Training	Individuals who currently enjoy being a part of the sport and wish to develop their own Swimming ability and achievements. Have a passion for aquatic activities and training within the sport and are part of an affiliated club.	£0.00	1 Year	Inactive	↑ ↓ ✎ ⌵
Club - Coach	Individuals who currently coach within the sport and hold a recognised coaching qualification. Enjoy being a part of the sport and wish to develop their own careers and talents. Have a passion for aquatic activities and wish to develop the sport.	£0.00	1 Year	Inactive	↑ ↓ ✎ ⌵

Do my members need some sort of approval?

Please note a member does not require approval to pay for their club's annual memberships fee. However, new members will sit as **Pending Approval** irrespective of whether they have chosen to purchase a membership or not.

In order to restrict members from purchasing a membership without the club admin's specific approval, you will need to implement rules on your memberships. Please refer to the Smart Rules guide to apply a membership restriction rule.

What will my members see?

Once the member is logged in, the Membership tab will display all the available memberships.

The screenshot displays a user profile page with a teal header labeled 'MY PROFILE'. Below the header are three tabs: 'PROFILE', 'MEMBER DETAILS', and 'MEMBERSHIP', with 'MEMBERSHIP' being the active tab. The page content is titled 'Club Membership > Template Club' and features four membership cards, each with a price tag of '£0' and a list of benefits.

- Club - Competitive (1 Year Membership):** Benefits include Club Benefit, online JustGo membership profile management, Swim Wales Member Insurance cover & National Governing Body support, and access to licensed competitions.
- Club - Training (1 Year Membership):** Benefits include online JustGo membership profile management, Swim Wales Member Insurance cover & National Governing Body support, access to CPD opportunities, and safeguarding resources.
- Club - Coach (1 Year Membership):** Benefits include online JustGo membership profile management, Swim Wales Member Insurance cover & National Governing Body support, access to DBS checks, and access to licensed competitions.
- Club (1 Year Membership):** Benefits include online JustGo membership profile management, Swim Wales Member Insurance cover & National Governing Body support, and access to development opportunities.

Each card includes a 'More info' button at the bottom.