



# GETTING STARTED GUIDE

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## **1.0 Overview**

Welcome! ClubSpark is the easiest way for you and your organisation to manage the business side of your sport, saving hours on administration and helping you operate in a more efficient way.

## **2.0 How to register as a club or coach**

**ADD in how to join via club affiliation**

### **2.1 How to register as a club or venue**

Visit <https://clubs.britishtriathlon.org.uk> ->  
Scroll to the bottom of the page and select the sign-up button for either a venue or coach.

### **2.2 Club registration**

Find your club in the registration screen (you can request a new venue to be set up if your venue isn't there). Once registered, you will see your new ClubSpark account immediately and be taken through the registration process as an administrator.

### **2.3 Signing in**

Sign in to your new ClubSpark account and navigate to the admin area by using the login method you chose at registration (email & password, British Triathlon account details, or Microsoft / Google+ / Facebook account). It is important to use the same method each time you login to pick up your memberships, bookings and admin rights.

Click on your name in the top right corner, select 'admin area' from the drop-down menu - this will take you to the back end of ClubSpark to view your club as a venue.

## **3.0 Your club profiles**

### **3.1 ClubSpark account number (CAN)**

Starting with CS, this is your ClubSpark account number, this can be seen on the righthand side of the home module.

### **3.2 Venue details**

Ensure that your contact details and address are correct by editing these details in the profile module within the admin area.

If you have any details that need updating, get in touch with [clubspark@britishtriathlon.org](mailto:clubspark@britishtriathlon.org)

[Support guide for setting up a venue](#)

### **3.3 Your reply-to email address**

It is important that you set your reply-to email address. If this box is blank, any replies sent out via ClubSpark will not be delivered or stored. This also ensures you receive replies to any communications sent from ClubSpark.

[Support guide for your reply-to email](#)

### **3.4 Social Media**

Stay connected with your members by entering your social media channels.

[Support guide for social media accounts](#)

## **4.0 Training (Coaching) Module**

The coaching module will be available when you first sign up for your venue or coaching account.

### **4.1 Registering for STRIPE**

To accept online payments for courses, you will need to register for a STRIPE account.

Courses set up with a price will not show on your website unless you have registered for a STRIPE account. Courses showing as £0 (free) will show on your website without a STRIPE account set up.

#### **4.1a How to Register for STRIPE**

Click on the training module on the left of your screen -> There will be a blue banner at the top of your screen with the STRIPE logo on the right hand side -> Click on the Set-up your account hyperlink within that blue banner -> fill in your details and click authorise access to this account at the bottom.

### **4.2 Setting up training sessions**

In order to advertise training sessions and allow members to book on to sessions through the website you must first set up courses.

#### **4.2a How to publish a training session**

Click add a new category in the top right hand-side of the screen -> fill out the page and save category -> Click on the category that you have just saved -> Click add new course in the top right hand side -> Complete the page and finish by clicking save course.

If training sessions do not appear on your website and you are registered for Stripe, please view (5.1b)

## **5.0 Getting started with Website Manager**

To begin using website manager, you first must activate the website module from within your admin area. Your homepage will go live automatically, and you can start adding content and images.

[Support guide to activate your website](#)

### **5.1 Setting up your website pages**

#### **5.1a Home**

Your home page will be partially set-up when you log in to your account for the first time. It is important to personalise this page and add as much detail and photos as possible.

#### **5.1a Membership**

Your membership page will display your membership packages you offer. The page is there to offer any additional information you might like to add or news about current members/memberships. You will need to activate your membership module to include membership on your website.

[Support guide for membership](#)

#### **5.1b Training**

Website manager allows you to publish all the courses you have created ready for online booking. In addition, you can use the page to display pictures

of training venues and give an overview of what training might consist of.

[Support guide for training](#)

### **5.1c News**

This section allows you to publish articles of interest to your members and contacts.

[Support guide for news](#)

### **5.1d Custom pages**

This allows you to add different pages that you think might add value to website. Examples might include a meet the team page, blog or FAQ page

[Support guide for custom pages](#)

### **5.1e Contacts page**

Here you can put all the necessary information needed for your members to get in touch with you.

[Support guide for contacts](#)

## **5.2 Website settings**

Settings is where you can set up your preferred URL, add your logo, set up a logo link override and edit your colour settings. To understand why these are important or may be relevant read the support guide below.

[Support guide for website](#)

## **5.3 Google Analytics**

If you have a Google Analytics account, we can add the code to your site to track your website statistics. Contact us at [clubspark@britishtriathlon.org](mailto:clubspark@britishtriathlon.org) with your Google tracking code starting with “UA” and we will



send this to ClubSpark to set up for you. You will have to enter your code into the "google tracking id" box which can be accessed by clicking on the website module and then settings in the top right.

## 5.4 SEO

Within website manager you have fields where you can enter a meta title and meta description. These will allow you to work on your SEO rankings. The support guide below explains how the meta description and the page title may improve your SEO

[Support guide for SEO](#)

## 6.0 Getting started with the Membership module

The membership module will be activated within the admin area once you have signed in.

### 6.1 Registering with GoCardless

To take payments online, ensure that you are registered with GoCardless.

#### 6.1a How to register with GoCardless

Click on the membership module on the left of your screen -> There will be a blue banner at the top of your screen with the GoCardless logo on the right hand side -> Click on the Set-up your account hyperlink within that blue banner -> Click on register bank account -> Fill in your details and click create account at the bottom.

[Support guide to register GoCardless](#)

### 6.2 Creating a membership package

You can create fixed date and date of purchase

membership packages. You should create different packages for all membership types run at your club.

### **6.2a How to create a membership package**

In the membership module there is a blue box that says '+new package', click that -> fill out the form -> click save package

[Support guide for membership packages](#)

### **6.3 Importing your existing members**

To import your members you will first have to create a membership package for the group you require e.g. create an adult membership package to import adult members. You should create a package for all memberships available at your club. This is a great way to get all your existing members onto the system.

[Support guide for importing adults](#)

[Support guide for importing juniors](#)

[Support guide for importing groups](#)

### **6.3a How to import your existing members**

Select the package you want to put your members onto -> Click on the blue 'Member options' box and select the import member dropdown -> To import an existing member use the 'Import existing package' box / To import members that aren't on the system use the 'Import from an existing file' box.

### **6.4 Sending payment requests**

You have the ability to invite your adult, junior and group members to join and pay. Or, simply invite

them to register so they can be recognised in the system, as a member.

#### **6.4a How to send payment requests**

In the membership module click in view all members in the top right hand corner -> Select the members you want to email by clicking the box next to their name -> Once all the members you want to email are selected click the 3 dot icon at the top of the table and select request payment.

[Support guide for sending payment requests](#)

[Support guide for sending membership invitations](#)

[Support guide for inviting junior and group members](#)

#### **6.5 Export your membership data to CSV / PDF**

ClubSpark allows you to export your members data to a CSV or PDF file. You can export your members data from within any of your membership packages or your 'all members' view.

##### **6.5a How to export your membership data to CSV/PDF**

In the membership module click on view all members in the top right hand corner -> Select the members whose data you want to export by clicking the box next to their name -> Once all the members whose data you want to export are selected click the 3 dot icon at the top of the table and select export into CSV/PDF.

[Support guide to export your data](#)

## 6.6 Communications with your members

Keep in contact with your members by emailing them with your club information.

### 6.6a How to communicate with your members

In the membership module click on view all members in the top right hand corner -> Select the members who you want to email by clicking the box next to their name -> Once all the members who you want to email are selected click the mail icon at the top of the table.

[Support guide to email your members](#)

## 7.0 Getting started with the Contacts module

### 7.1 Adding contacts

Contacts will be populated with the ‘contact details’ from your membership upload. To add a contact got to the contact module -> click on the blue box in the top right hand corner which says contact options -> select add new contact and fill out their details.

[Support guide to add a contact](#)

### 7.2 Email your contacts

You can send emails from within any of your membership packages or your ‘all members’ view.

[Support guide for sending emails](#)

#### 7.2a How to email your contacts

Select the contacts who you want to email by clicking the box next to their name -> Once all the contacts who you want to email are selected click the mail icon at the top of the table.

### **7.3 Tag your contacts**

Adding tags to your contacts makes group communication easier and saves time on managing larger contact lists. For example you can tag volunteer contacts to be able to email them all at once with updates about latest volunteer opportunities.

#### **7.3a How to create a tag**

Click on the blue box in the top right-hand corner which says contact options -> Select contact tags -> click add new tag, fill in the information needed and click save tag.

#### **7.3b How to add contacts to a tag**

Select the contacts who you want to add to a tag by clicking the box next to their name -> click the tag icon at the top of the table -> Select the tag you want the contacts to be a part of and then click save.

[Support guide for tagging contacts](#)

### **7.4 Invite your contacts to register**

You can send invites from the profile of any of your contacts, when they have an email address in their record.

#### **7.4a How to invite your contacts to register**

Select the contacts who you want to Invite to register by clicking the box next to their name -> Click the 3 dot icon at the top of the table -> Select Invite.

[Support guide for inviting contacts](#)

#### **7.5 Export your contacts to CSV / PDF**

You can export your contacts data to a PDF/CSV file.

#### **7.5a How to export contacts to CSV/PDF**

Select the contacts whose data you want to export by clicking the box next to their name -> Once all the contacts whose data you want to export are selected click the 3 dot icon at the top of the table and select export into CSV/PDF.

[Support guide for exporting data](#)

### **8.0 Getting started with Events - Open days**

There are hundreds of events taking place across the UK, that you can sign your venue up to and be a part of all throughout the year. Set up and advertise events and open days on your ClubSpark website.

#### **8.1 How to set up an Open Day**

In the event module click the blue box in the top right of the page that says 'create new' -> fill out the information about the event and click save event -> Add activities to your open day by clicking the blue box that says '+new activity' -> This will take you to a page with the headings; details, activities, attendees and email reminders -> Fill in the details about the activity before clicking save activity -> You can also

add sessions at the bottom of the page -> Click on the heading attendees -> Here you can choose to import attendees or add them manually -> Click on the heading email reminders -> Choose your preferred option for email reminders -> Click save changes and then publish event to website which is at the top right hand side of the page.

[Create an Open Day](#)

## 9.0 FAQs

[How do I reconcile online payments with my bank account?](#)

[How can I upload documents to my website?](#)

[How can I reduce \(pro-rata\) the membership cost throughout the year?](#)

[How can I make the membership a different price for an individual?](#)

[Ensure your club is GDPR compliant](#)