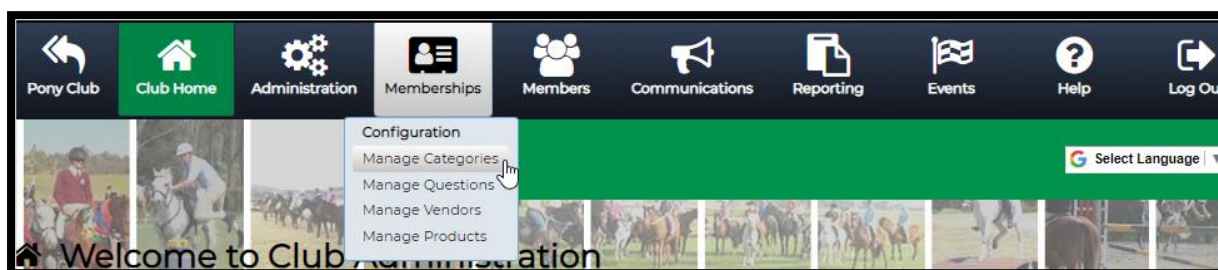


My Pony Club Membership Set-up Requirements

Membership Settings

When you hover over 'Membership Settings' the following option appears:



The Manage Categories menu option allows you to define and maintain the membership types, membership timeframe information (membership periods) and registration periods related to the club.

From this option, the club administrator can assign fees to memberships and optionally define a pro-rata schedule for memberships.

Manage Memberships

Setting up your club Membership can be done in 3 easy steps:

1. Add your Club Year
2. Add the fees for the memberships available at your club
3. Add the memberships your club will make available to your members, such as Senior Member, Junior Member, Family Member, Social Member and Student Member

The Pony Club Membership Manager enables you to set up and manage your own club membership categories and fees. Before adding new memberships ensure you add your Membership Year, the membership period and your fee settings.

Note : This is NOT the place to add members - just the membership categories your club has.

Membership Year :

Membership Period : 01-Jul-201530-Jun-2016

Your Membership Registration URL : https://osm-pony.omnisportsmanagement.com/Memberships/OSMMbr_NewMembership.aspx?id=538A2C039FCB5BF0BE82D6266FBF198B2ABAF7431CBB8DB45183E73D94827DAC792F4AEAF3CBF607

Step 1 – Set Membership Year

- Select **[Add Year]**. A pop up box will appear
- Enter your membership year (E.g. 2019); the membership year start and end dates eg. Calendar or Financial Year; then select the appropriate State Membership year from the drop-down box

My Pony Club Membership Set-up Requirements

Add Membership Year

Insert the membership year and period. It is recommended that your membership period runs for a 12 month period.

Membership Year : (eg. 2013 or 2013/2014)

Period : From To

State Membership Year :

Active:

- If you would like to make this year active immediately, tick the Active box (Note: you can edit this at a later stage if required). Active makes the year the default for your Club when viewing information.
- Once Completed, select **[Add]**

Step 2 – Managing Fees

You can create as many memberships fees as required by your organisation and edit these at any time. If you are changing your membership fees for the new year but do not wish to edit the membership fees for the current year, you will need to add a new fee.

To add or edit fees:

- Select **[Manage Fee Categories]** and click **[Add New Fee]**
- Under the Fee category heading enter your fee name; under the Amount heading enter the fee price; Select **[Insert]**
- To edit a fee at any time, select **[Edit]** and make the appropriate changes. Select **[Update]** to save
- To remove a fee, select **[Delete]**
- Once you have added/edited all fees select **[Finish]**

My Pony Club Membership Set-up Requirements

Manage Fees

The Manage Fees screen enables you to add and edit your fee categories. These fee categories are then assigned to your membership categories.

Fee Category	Amount	Edit	Delete
Family	\$40.00	Edit	🗑️
Individual	\$20.00	Edit	🗑️
Riding	\$0.00	Edit	🗑️
Social	\$0.00	Edit	🗑️

Add New FeeRefresh

Finish

Step 3 – Add New Memberships

Note: If your organisation has existing memberships from previous years in My Pony Club you can copy these from year to year. For more details on how to copy memberships please see the Copy Memberships section below of this user guide.

To add new memberships:

- Select **[Add new membership Category]**
- Select the membership year from the drop-down box
- Enter name, such as Senior, Junior, Student, Social and the Description if required. Description gives the member information on the membership, such as age range, valid dates or maximum Family Members etc.
- Enter Membership Period (dates this membership will be current) and Registration Period (dates you will accept registrations- this can be different to the Membership Period)
- Select the State Membership you would like to link to this membership to
- Select the fee that is charged for this membership (see the Managing Fees section above)
- Tick Available Online box to allow members to register/renew online. (Note: Your Club has its own registration page where members can renew or register, through the frontend of the system at Members Login Page)
- Tick Active box to make the Membership Live
- If you are offering Pro-Rata¹ fees for this membership tick this box. Please note: Pro-Rata fees will override the fees set up in “manage membership fees”.
- Select **[Update]**

¹ ProRata allows you to charge a different fee amount for the memberships depending when the member joins. Months 1-12 are relative to your membership period. For a calendar year membership period; if a member joined in June they would be charged the Month 6 fee. For a financial year membership period (1st July – 30th June), Month 6 would represent December.

My Pony Club Membership Set-up Requirements

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

- Membership Year: A dropdown menu with "--Please Select--" selected.
- Membership Name: A text input field.
- Description: A larger text input area.
- Membership Period: Two date pickers labeled "From:" and "To:".
- Registration Period: Two date pickers labeled "From:" and "To:".
- Fee Category: A dropdown menu with "--Please Select--" selected.
- Available Online: A checkbox (unchecked) with a link to "More Information".
- Voting Rights: A checked checkbox.
- Active: An unchecked checkbox.

Below the form is a section titled "Advanced Fee Options" with a checkbox for "ProRata" (unchecked). At the bottom are two green buttons: "Cancel" and "Update".

NOTE: You can edit the Registration Date, Online and Active Options at any time by clicking update from the Manage Memberships screen.

Once the membership is completed by clicking **[Update]**, it will be added to the Membership list.

Copy Memberships

At the start of your new membership year you can cut down on administration time by copying the previous year's memberships to the new membership year by selecting 'Copy Memberships'.

The screenshot shows a pop-up window titled "Copy Memberships". It contains the following information and controls:

- Introductory text: "You can bulk copy memberships from one year to another. This will copy all the selected membership categories and their settings to the selected membership year. Upon copying, you will be required to select a new State category for each membership."
- Copy memberships from: A dropdown menu with "2017/2018" selected.
- Select memberships to copy: A list box containing the following items with checkboxes:
 - Adult Riding Member
 - Associate Member
 - Junior Member
 - Non-Riding
 - Senior Member
 - Strapper/Groom
- Copy memberships to: A dropdown menu with "2018/2019" selected.
- Buttons: "Cancel" and "Continue" (both green).

- Click **[Copy Memberships]** A pop-up box will appear.
- Select the year you would like to copy memberships from (eg: 2017/2018)
- Tick the membership/s you would like to copy from the available box
- Select the membership year you would like to copy membership to (eg. 2018/2019)
- Select **[Continue]**

My Pony Club Membership Set-up Requirements

Copy Memberships

You can bulk copy memberships from one year to another. This will copy all the selected membership categories and their settings to the selected membership year. Upon copying, you will be required to select a new State category for each membership.

Membership Name	Zone Membership	State Membership	Delete
<input type="text" value="Adult Riding Member"/>	<input type="text" value="Adult Riding Member"/>	<input type="text" value="Adult Riding"/>	Delete
<input type="text" value="Associate Member"/>	<input type="text" value="None"/>	<input type="text" value="None"/>	Delete
<input type="text" value="Junior Member"/>	<input type="text" value="None"/>	<input type="text" value="None"/>	Delete
<input type="text" value="Non-Riding"/>	<input type="text" value="None"/>	<input type="text" value="None"/>	Delete

Please confirm the above details before you copy these memberships

- If required, you can edit the membership name/s in the left field
- Select the Zone and State membership you would like to link to these memberships
- Select **[Copy]**
- You will be redirected to the Manage Memberships Screen

Membership Year :

Membership Period : 01-Jul-2018-30-Jun-2019

Your Membership Registration URL : https://osm-pony.omnisportsmanagement.com/Memberships/OSMmbr_NewMembership.aspx?id=538A2C039FCB5BF0BE82D6266FBF198B2ABAF7431CBB8DB45183E73D94827DAC792F4AEAF3CBF607

Membership Name	Begin Date	End Date	National Fee		State Fee		Zone Fee		Club Fee		Online	Active	Update
			Amount	Pro Rata	Amount	Pro Rata	Amount	Pro Rata	Amount	Pro Rata			
Adult Riding Member	01-Jul-2018	30-Jun-2019	\$10.00	No	\$63.95	No	\$6.00	No	\$35.00	No	No	<input type="button" value="Inactive"/>	<input type="button" value="Update"/>
Associate Member	01-Jul-2018	30-Jun-2019	\$10.00	No	\$63.95	No	\$6.00	No	\$0.00	No	No	<input type="button" value="Inactive"/>	<input type="button" value="Update"/>
Junior Member	01-Jul-2018	30-Jun-2019	\$10.00	No	\$77.15	No	\$10.00	No	\$60.00	No	No	<input type="button" value="Inactive"/>	<input type="button" value="Update"/>
Non-Riding	01-Jul-2018	30-Jun-2019	\$10.00	No	\$30.00	No	\$2.00	No	\$0.00	No	No	<input type="button" value="Inactive"/>	<input type="button" value="Update"/>

Please check all the details of your copied memberships such as registrations date, descriptions and fees before you change your memberships to active. **Note:** *Once someone joins the membership you will no longer be able to edit the Membership Name, Membership Period, Financial Year, State Membership or Zone Membership that your membership is connected to.*

- Memberships will appear as Inactive, to change to active, just click 'Inactive'.
- To edit/review memberships, select **[Update]** and follow the steps in "Adding New Membership" (Step 3 above). From the update screen, you can turn the Online Membership option ON and view the membership page your members will see, just select the link "View my online registration screen" from the update page.
- To activate online memberships, tick the available online checkbox.

Deleting Memberships: If the need to delete a membership arises, open the membership you wish to delete and select the **[Delete]** button located at the bottom of the screen. You will not be able to delete a membership once someone has joined it. **Note:** *If you try to delete the membership the following message will appear: **Membership has roster records, cannot delete Membership**. If required to delete a membership after someone has joined, you will need to contact the Helpdesk.*