Playgroup WA

Playgroup WA Membership System Instructions

This document contains details on how to access and use the Membership System. The following information will be covered in this document:

1. How to get log in details
2. Step 1: Declaration
3. Step 2: Update Sessions
4. Step 3: Update Members
5. Renew Existing Members
6. Invite New Members to Trial or Join
7. Updating Playgroup Contact Information
8. Adding a New Playgroup Contact
9. Important Information to Note

Please note: only one Playgroup Contact needs to complete the playgroup registration

1. How to get log in details

1.1. Access the new membership system via the registration link emailed to you

1.2. Alternatively, navigate to **pgwamembership.com.au**

1.3. Create a password and click 'Register'

2. Step 1: Declaration

2.1. *Please note: only one Playgroup Contact will be required to complete this step*

2.2. Click '**Complete Declaration**'

2.3. Click the tick button to accept the declaration

2.4. Click '**Save Declaration**'

3. Step 2: Update Session

3.1. Click '**Renew Sessions**'

3.2. *Playgroup sessions from the previous system will be transferred across and appear in this section*

3.3. Click edit ✏ next to the session

3.4. Click edit ✏ in the '**Session**' box to update the session details

3.4.1. Check the session type, subtype (e.g. if a cultural group is selected, subtype will be the language), time, day and venue

3.4.2. If this session has availability, tick the '**Accept Referrals**' box. Untick this box if the session is full.

3.4.3. Add max number of attendees if relevant

3.4.4. Once all session details have been updated, click '**Save**' within the box

3.4.5. Update session contact information *(this information is not shared externally)* by clicking edit ✏ in the '**Session Contact**' box

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3.5. To add a session, click '**Add a Session..**' at the top of the screen

    3.5.1. Match an existing Playgroup Contact or create a new contact by entering email address and phone number

    3.5.2. If they are an existing Playgroup Contact, select '**Use This Person**'

3.6. Once updated, '**Save**' and click '**Close Tab**' at the top of the screen and navigate to '**Sessions**' tab on the side navigation menu

3.7. To renew sessions

    3.7.1. Tick the session renewing this year *(this can be done in bulk when all details are updated and correct)*

    3.7.2. Click '**Renew Sessions**' at the top of the screen and confirm

    3.7.3. The status column will update and reflect the session as '**Renewed**'

3.8. Navigate back to the '**Home**' tab

4. **Step 3: Update Members**

4.1. Click '**Renew Members**'

4.2. Check the '**Children Without Sessions**' column and update any members that are showing '**Yes**' by clicking edit ✏ next to the member *(Note: Yes means the child has not been allocated a session and this is an item to be actioned)*

    4.2.1. Click '**Add a Session**' button next to each child

4.3. To edit or update member details, click edit ✏ next to the member

4.4. Please note: to return to the members list and select bulk members to renew, click 'Close Tab' at the top of the screen. To renew an individual member, click the 'Renew/Process Member' at the top of their 'Member Information' window.

5. Renew Existing Members

5.1.1. To renew an individual member, click edit ✏️ and click '**Renew/Process Member**' and confirm.

5.1.2. To renew multiple members, return to the member list using the '**Members**' tab in the side navigation menu, tick the members to renew and click '**Renew Selected Members…**' at the top and confirm

5.1.3. To renew *all* unprocessed members, click '**Select all Unrenewed**' and once all are selected, click '**Renew Selected Members…**' and confirm

5.1.4. Renewing member(s) will automatically email them a registration link. If there is an error with a member's information an orange box will pop up displaying the member/s names. Unselect the blue tick next to the member(s) with errors to continue bulk renewal. Edit the member with errors and update their information, click 'Renew/Process Member' at the top of their Member Information window.
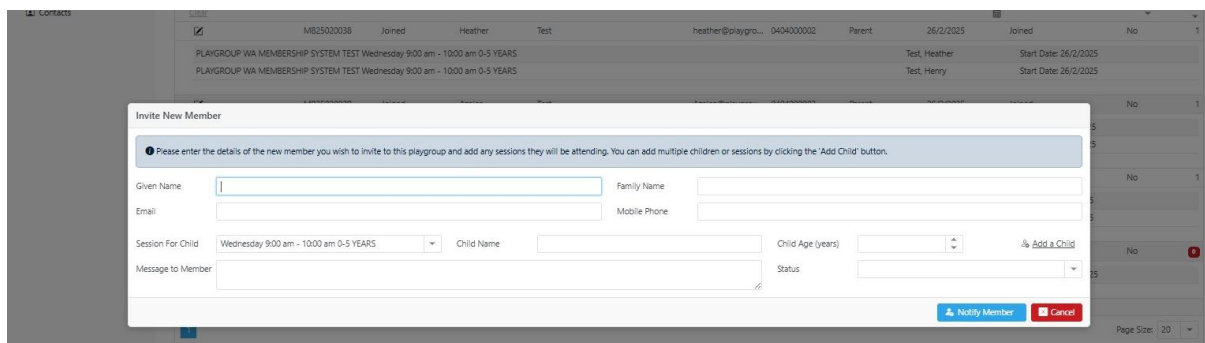
6. Invite New Members to Trial or Join

6.1. Navigate to the '**Members**' tab on the side navigation menu

6.2. Click '**Invite a New Member..**' at the top

6.3. Fill in the required details and add a message to the member (e.g. please join us for a trial on Wednesday at [x] Playgroup)

6.4. Click the '**Status**' drop down button and select *Invite to join* or *Invite to trial*

6.5. Click '**Notify Member**' which will automatically send a registration link to the member via email

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7. Updating Existing Playgroup Contact Information

   7.1. To update the details for an existing Playgroup Contact, navigate to the '**Home**' tab on the side navigation menu

      7.1.1. *Please remember to use a personal email address. View 7.4. for where to input your playgroup email address*

   7.2. Under '**Contacts & Volunteers**', click edit ✏ next to the Playgroup Contact

   7.3. Click the edit ✏ button to edit or update the relevant information

   7.4. Please ensure you select a '**Contact Type**' and add a '**Playgroup Email**' if relevant

      7.4.1. *The 'Playgroup Email' entered for the 'Enrolment Contacts' will be the email enquiries are sent to*

   7.5. Click '**Save**'

   7.6. *Please note: this section is only to be used to update personal details of the Playgroup Contact, do not use this section to update role (Contact Type)*

8. Adding a New Playgroup Contact

   8.1. Next to '**Contacts & Volunteers'**, click '**Add New Contact**'

   8.2. Enter the Playgroup Contact's personal email address. If they are an existing member, the system will find a match and prompt you to click '**Use This Person..**'

      8.2.1. Update their details, click '**Save**' and then click '**Send Registration Invite**' to automatically send a registration link via email

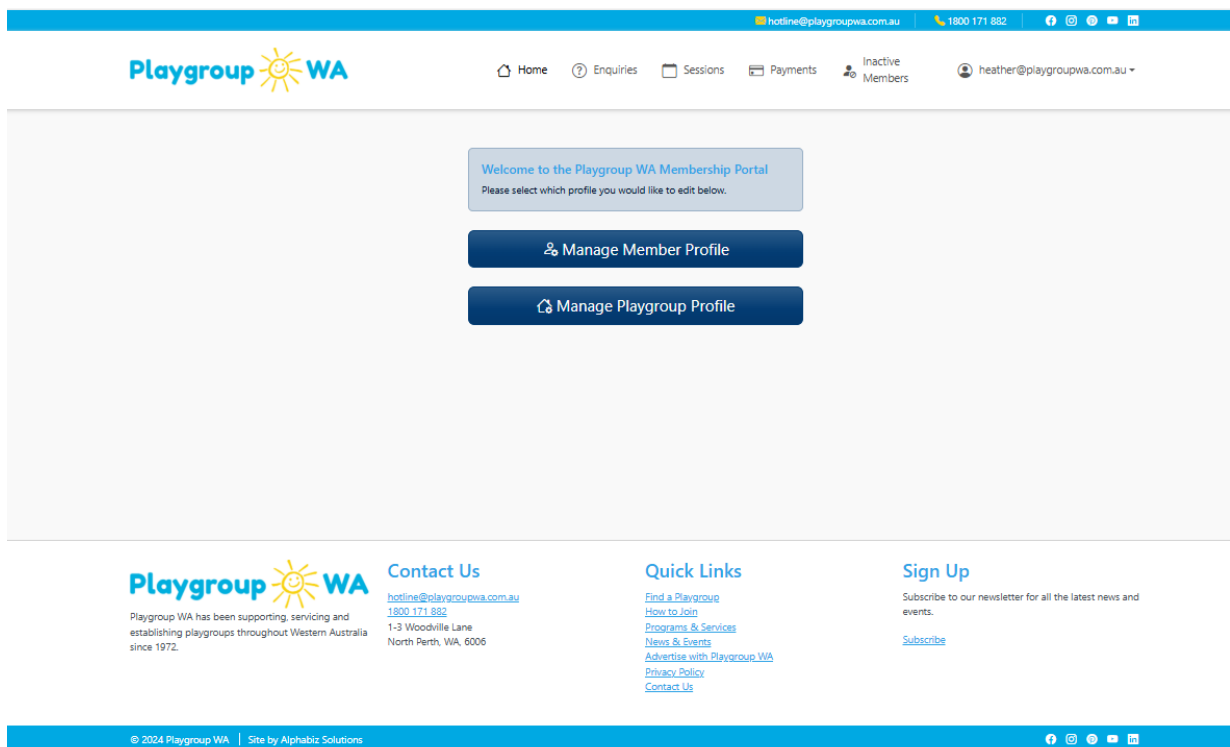   8.3. If they are a new member, fill in their email and phone number and click '**Create New Person**'

      8.3.1. Fill in their details, please ensure a '**Contact Type**' is selected.

      8.3.2. Click '**Save**' and then click '**Send Registration Invite**'

      8.3.3. To change the Playgroup Contact for a role you will need to '**Add New Contact**' and select the role in **Contact Type**. This will override the existing details for that role.

9. Important things to note:

- When initially registering, please use your **personal** email. A playgroup email address can be selected when editing a Playgroup Contact's details – **please see Updating Playgroup Contact Information**

- Playgroup Contacts invited to register for the Playgroup Profile will need to be sent a Member Registration email – **please see Renew Existing Member**

- Members who are Playgroup Contacts will have access to both their Personal Profile and the Playgroup Profile using the same log in. When logging into the system there will be the option to select which profile to manage. To switch to the other profile, they will have to log out and log back in.