EzyClub

HANDBOOK

EzyClub handbook

Every guide for clubs on EzyClub: setting up, running the site, each committee role, and members.

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https://ezyclub.au/guides

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FOR THE PLATFORM OPERATOR AND THE CLUB'S LEAD CONTACT

Onboarding a club

Bringing an existing club onto EzyClub in about a week: what to gather, the day-by-day plan, moving members and the books across, testing, and launch day.

This guide brings an existing club onto EzyClub in about a week. It is written for two people working together: the platform operator, who sets up the club and moves its records across, and the club's lead contact, usually the President or Secretary, who gathers what is needed and makes the decisions. Each day ends with checks, so problems are caught while they are small.

> Nothing reaches members until launch day. Email stays in test mode and the club's own domain stays pointed at its old site until day 7, so the committee can try everything first.

Who does what

Who	What they do
Platform operator	Creates the club (or helps the lead contact sign up), receives the files safely, imports the member list and the bank statements, checks the numbers, and is on hand on launch day. Works in the operator console and, when the club allows it, inside the club's console through platform support access.
Club lead contact	Gathers the list below, answers questions about the membership rules, checks the imported members and the opening balances, chooses who gets which role, and signs off each day's checks.
Committee	Each member learns their own part of the console from their role guide (day 5), and tries it on real records before launch.
Treasurer	Supplies the bank statements and opening balances, and checks the books with the operator on day 3.

What to gather before day 1

The lead contact collects these. Most clubs already have them in spreadsheets, a treasurer's workbook or the old website.

1. **The member list**, as a spreadsheet (details below).
2. **Bank statements** for every account the club holds, as CSV files, from the start of the current financial year to today (details below).
3. **Opening bank balances**: the balance of each account on the day before the conversion date (usually 30 June or 1 July), and the date itself.
4. **Other things the club owns or owes** on that date, if any: equipment, stock of regalia, money held for others, fees paid in advance, unpaid bills. The Treasurer or the club's accountant will know. See The books.

5. **The logo** (a PNG with a transparent background is best) and the club's two colours.
6. **The committee**: each person's name, email and position, and which parts of the console they need. See Roles and access.
7. **The domain**: the club's web address (for example myclub.org.au), who registered it, and who can change its DNS records.
8. **Payment accounts**: whether the club uses Square, Stripe or PayPal, and who can sign in to it.
9. **Membership categories and fees**: each category's name and yearly fee, the date the membership year ends, and how long late payers stay on before they lapse.
10. **The events calendar** for the next few months.
11. **Shop products**: names, prices, sizes and stock counts.
12. **The newsletter or magazine**: its name, and any past issues to put in the archive.
13. **The club's bank details** for direct deposit (account name, BSB, account number).

The member list

One row per member, with a heading row. Save it as CSV (in Excel or Google Sheets: File › Save as / Download › CSV). The import recognises these column headings; the words in brackets also work:

Column	Needed?	Also recognised as
Email	**Yes**	e-mail, email address
First name and Last name	**Yes** (or Full name)	given name, surname, family name; or one "Name" column ("Surname, First" works)
Member number	No	member no, number, no., #, id
Category	No	membership, type, class, plan, grade
Financial to	No	expiry, expires, valid to, paid to, renewal date, due
Joined	No	join date, member since, start date
Second member	No	partner, joint member, spouse
Mobile, Phone	No	mobile phone; home phone, landline
Street, Suburb, State, Postcode	No	address, town, city, post code

A small example (address and phone columns go on the right in the same way):

Member No	First name	Surname	Email	Category	Financial to
101	Alex	Morgan	alex@example.com	Single	30/06/2027
102	Jo	Nguyen	jo@example.com	Family	30/06/2027

- **Dates** as 30/06/2027 or 2027-06-30.
- **Categories** must match the categories set up on day 1 (by name). A row with an unknown category is skipped, so set the categories first.
- **Member numbers** are kept when they are free; a clash gets a new number, and the preview says so.

- **Anyone without an email address is skipped.** List them separately; they are added by hand on day 2 (Members › Add member).
- **Cars** are not part of the import. Members add their own from their profile, or the committee adds them on each record.
- Up to 5,000 rows and 2 MB a file. An email already on the member list is skipped, never merged.

Bank statements

Download each account's transactions from internet banking as **CSV**. PDF, OFX and QIF files can be stored for reference, but only CSV can be imported. The import needs a date column, a description column, and either one amount column (money out as a minus) or separate debit and credit columns. It recognises the usual bank headings: *Date, Transaction date, Posting date*; *Description, Narrative, Details, Memo*; *Amount*; *Debit, Withdrawal, Money out*; *Credit, Deposit, Money in*. Dates such as 01/08/2026 and 2026-08-01 both work. Importing the same statement twice adds nothing.

Handing the files over safely

A member list is personal information and a bank statement is sensitive. Don't leave them in email threads.

1. The lead contact sends the files to the operator by the route the two of them agree (a shared folder that is deleted afterwards, or in person on a USB stick), never in a group email.
2. The operator uploads them straight away in the operator console: open the club, then **Onboarding files**, choose the files, pick *Member list*, *Bank statement* or *Other*, add a short note, and press **Upload**. CSV, Excel, PDF, OFX/QFX/QIF and text files up to 20 MB each are accepted.
3. The operator deletes every other copy (downloads folder, email attachments).

Uploaded files are kept outside the website, locked with the club's own key, and every upload, download and deletion is written to the club's audit log, which the committee can read. Once a file has been imported and checked, the operator deletes it from Onboarding files.

The week, day by day

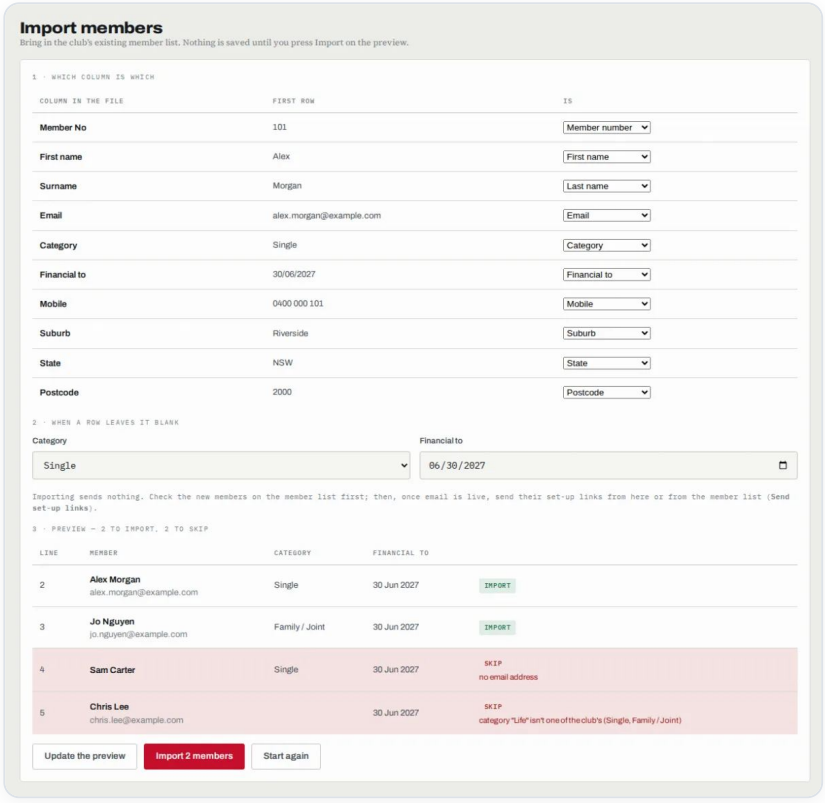
Day 1 · The club, its look and its fees

1. The lead contact signs up at EzyClub (or the operator does it with them), confirms the email, and signs in. See Getting started with EzyClub.
2. Work through **Setup & branding**: club details, logo and colours, membership categories and fees, the end of the membership year and the grace period.
3. Add the club's bank details for direct deposit (Setup step 5, which opens the books' settings).
4. Leave email in its starting mode. Nothing is sent to members until day 7.

Check: the public site shows the right name, logo and colours; the Join page lists every category with the right fee.

Day 2 · Members

1. Whoever does the import needs the Membership role. If it is the operator, the lead contact (holding Membership) gives platform support access first; the operator then works with the lead contact's roles. Or the lead contact does the import with the operator on the phone. Open **Import members**.
2. Upload or paste the CSV and press **Preview**. Check the column matching in part 1 and correct any column the import guessed wrongly.
3. Set what a blank category or financial-to date should mean (part 2).
4. Read the preview. Each skipped row says why: no email, a category the club doesn't have, a date that can't be read. Fix the spreadsheet and preview again until only the rows you expect are skipped.
5. Press **Import**. Importing emails nobody. Then add the members without an email address by hand (Members › Add member).
6. Review: open the member list and check the new members before anyone is contacted. Their set-up links go on launch day, once email is live (day 7).



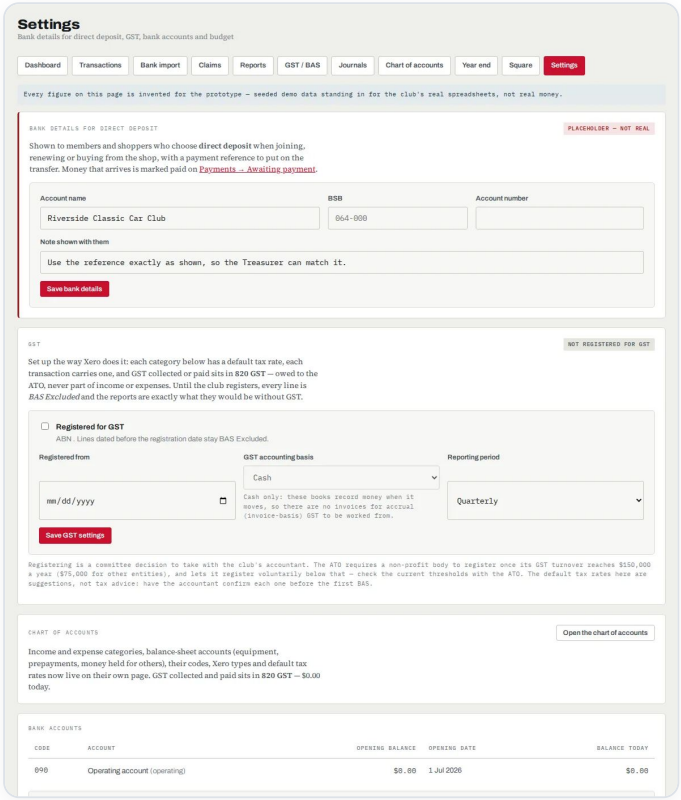
The preview. Two rows are skipped here: one has no email, the other a category the club doesn't have.

Check: the Members page count matches the club's own count; the *In grace* and *Lapsed* filters show who you expect; open a handful of records and compare them with the spreadsheet.

Day 3 · The books

1. In **The books › Settings**, add each bank account with its opening balance and opening date (the conversion date). The Square clearing account appears by itself once Square is connected.

2. In **Year end › Conversion balances**, enter anything else the club owned or owed on that date. Retained Earnings is worked out for you.
3. Check the **Chart of accounts**: rename or add income and expense categories to match how the club reports at its AGM.
4. In **Bank import**, import each account's statement CSV. Match lines to transactions that already exist, and code the rest.



The books' settings: bank accounts with their opening balances and dates.

Check: on **Reports › Balance Sheet**, each bank account matches the bank's own balance on the statement's last date, and the report says net assets equal equity. The Treasurer signs this off. See The books.

Day 4 · Events, the shop and the site's words

1. Add the next few months of events (**Events & site text**), with tickets and capacity where needed. See Events and event day.
2. Add the shop's products and stock. See The club shop.
3. Edit the home page headline and the About page text; add past magazine issues.

Check: the public calendar, the shop and the About page read correctly on a phone.

Day 5 · The committee

1. Give each committee member their roles (Setup step 4, or their member record). Anyone new gets a set-up link by email; while email is in test mode, copy the link shown on screen and pass it on yourself.

2. Each person reads their role guide in **Help › Manuals** and signs in to try it.
3. Run a short session together: the Membership person adds a test member, the events person makes a test event, the Treasurer posts a test transaction. Delete or cancel the test records afterwards.

Check: everyone can sign in and reaches only the parts their roles allow.

Day 6 · Email and payments

1. Set up **Email sending**: enter the club's domain and from address, add the DNS records the page shows, and wait for them to verify. Switch the mode to **Test** and put two committee addresses in the test inboxes. See Running the site.
2. Connect the club's **Payment account** (Square, Stripe or PayPal). Until one is connected, card payments are pretend.
3. Make one small real card payment (a renewal or a shop item) and refund it. Confirm it reaches the books.
4. Write a short welcome newsletter and send it in test mode. Check how it looks in the test inboxes. See Newsletters and notices.

Day 7 · Launch

See the launch-day checklist below.

Launch-day checklist

- Email sending: switch the mode to **Live**.
- Domain: add the club's own domain under **Domains**, create the two DNS records, wait for "verified" and the certificate, then make it the primary address.
- With email live, press **Send set-up links** on the member list: every member who has never signed in gets a link to choose a password (100 at a time; press again for the next 100). Check the panel says email is live before you press it.
- Send the welcome newsletter to all members, saying the set-up email is on its way and to look in junk mail if it doesn't arrive.
- If the old website stays up for a while, put a notice and a link on its home page.
- Keep the Email page open for the first few hours and watch for bounces.
- Take away platform support access when the operator is done (it also ends by itself when its time runs out).

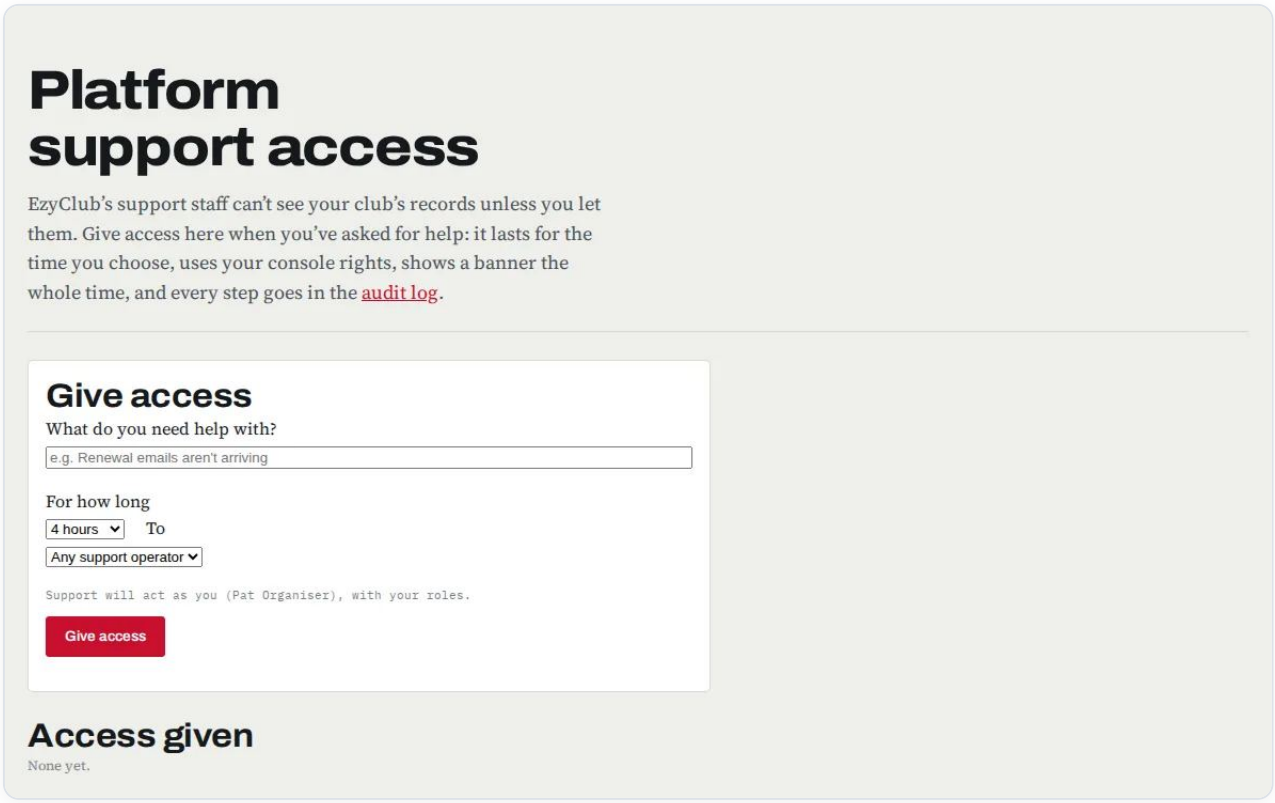
The first month

- **Week 1:** answer members' sign-in questions; fix bounced emails on member records; check new applications daily.
- **Week 2:** the Treasurer imports the latest bank statement and matches it; card payments and payouts line up.

- **Week 3:** check the first event's RSVPs, reminders and door check-in.
- **Week 4:** review roles (anyone with more than they need?), delete the onboarding files, and look at the audit log together.

Getting help from the operator

The operator can't see a club's records unless the club lets them. To ask for hands-on help, open **Platform support access**, describe the problem, choose how long (a few hours is usually enough) and press **Give access**. The operator then works as you, with your roles; a banner shows the whole time, every step goes in the audit log, and you can end it at any moment with **End now**.



Giving the operator time-limited access.

FOR THE PERSON SETTING UP A NEW CLUB

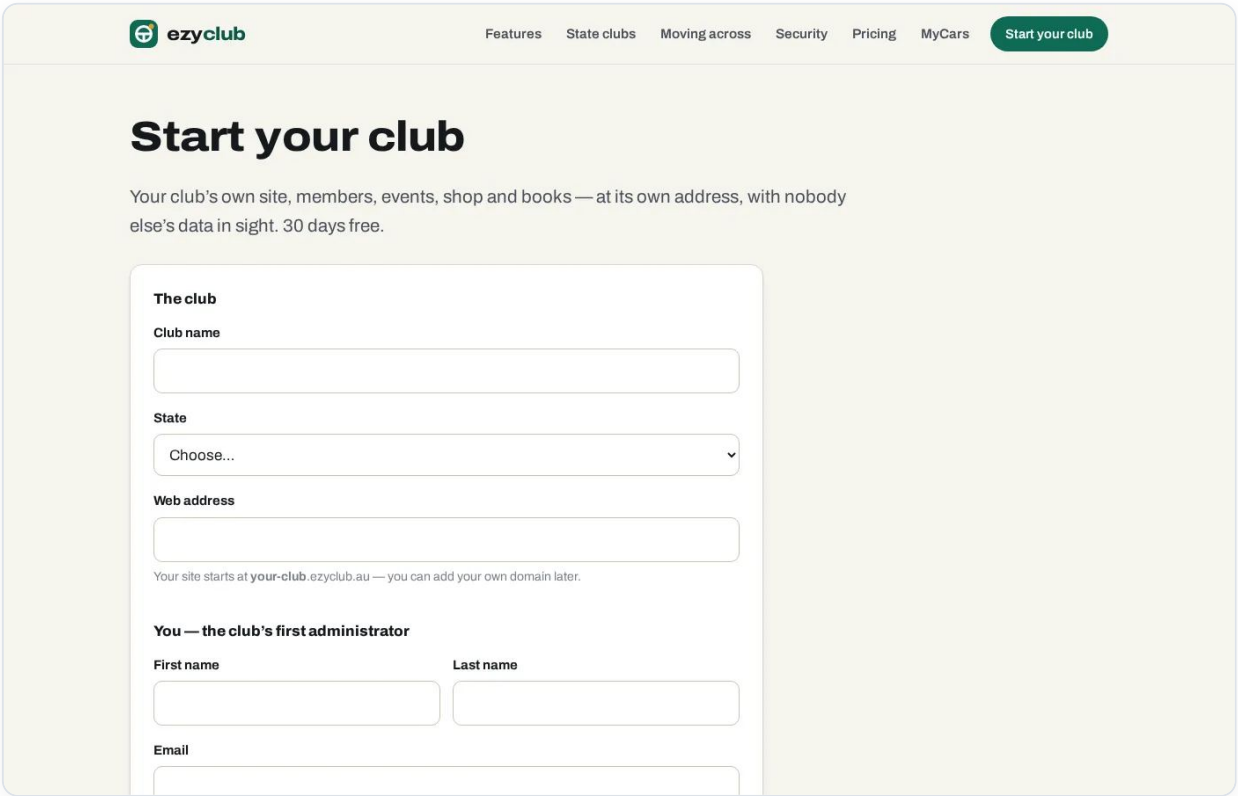
Getting started with EzyClub

From sign-up to go-live: the setup wizard, your address, email, payments, importing members, inviting the committee, and a launch checklist.

EzyClub gives your club a website at its own address, online joining and renewals, events with RSVPs and door check-in, newsletters, a club shop and the Treasurer's books, all run by the committee. This guide takes the person setting it up from sign-up to the day members first see the site. Bringing an established club across with its members and books? Read Onboarding a club as well.

Signing up

1. On the EzyClub website, press **Start your club**.
2. Enter the club's name and choose its **web address**, the part before the platform's domain (for example *riverside-ccc*). Lower-case letters, numbers and hyphens. The form tells you straight away if it is taken.
3. Enter your own name, email and a password, twice. You become the club's first administrator.
4. Press **Send the confirmation link**.

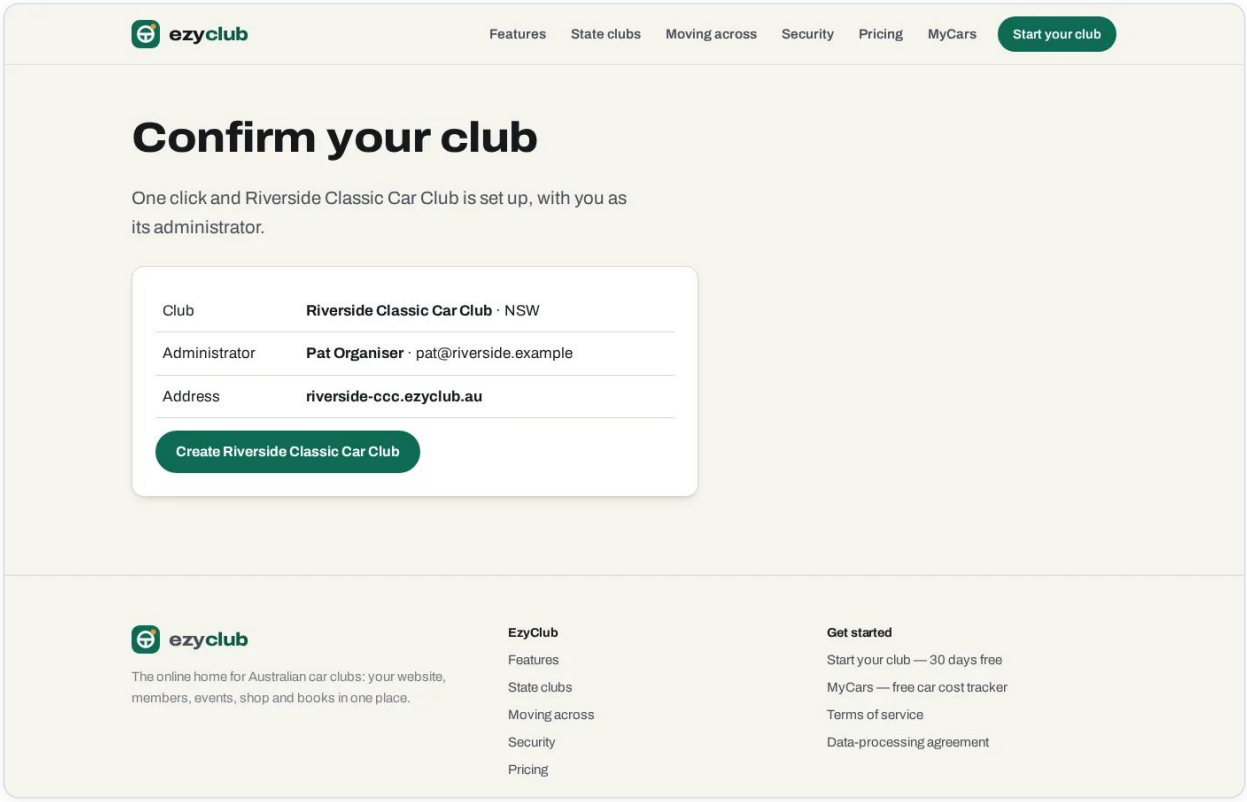


The sign-up form.

A confirmation email arrives within a minute or two. The link works once, for a limited time; if nothing arrives, check the spam folder or sign up again (the newest link is the one that works).

1. Open the link. The page shows the club, you as administrator, and the address.

2. Press **Create**. The club exists from that moment, on a 30-day free trial.
3. Sign in with the email and password you chose.



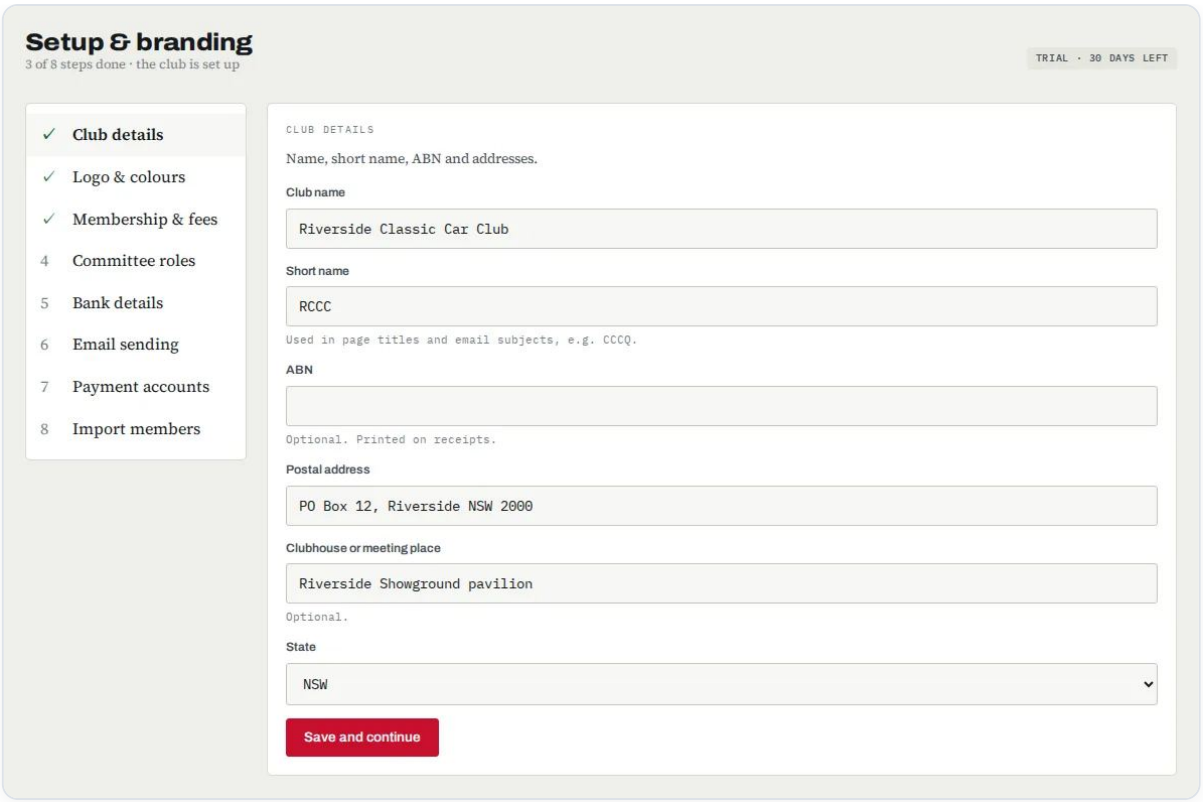
Confirming the club.

The setup wizard

After signing in you land in the committee console. **Setup & branding** (under Club in the sidebar) walks through eight steps. The first three are needed before members see a finished site; the rest can be done later or skipped, and every step can be revisited at any time. Until the first three are done, a red “Finish setting up the club” notice shows in the console.

1 · Club details

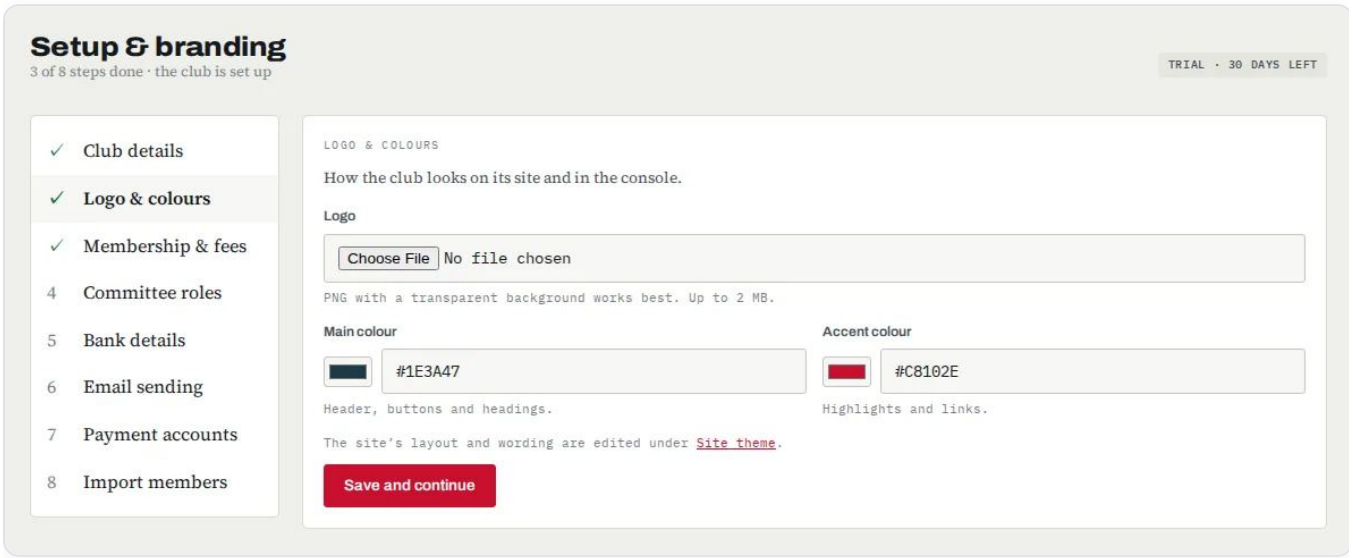
The club’s full name, a short name (used in page titles and email subjects), the ABN if it has one (printed on receipts), the postal address, the clubhouse or meeting place, and the state.



Step 1: club details. The ticks on the left show which steps are done.

2 · Logo and colours

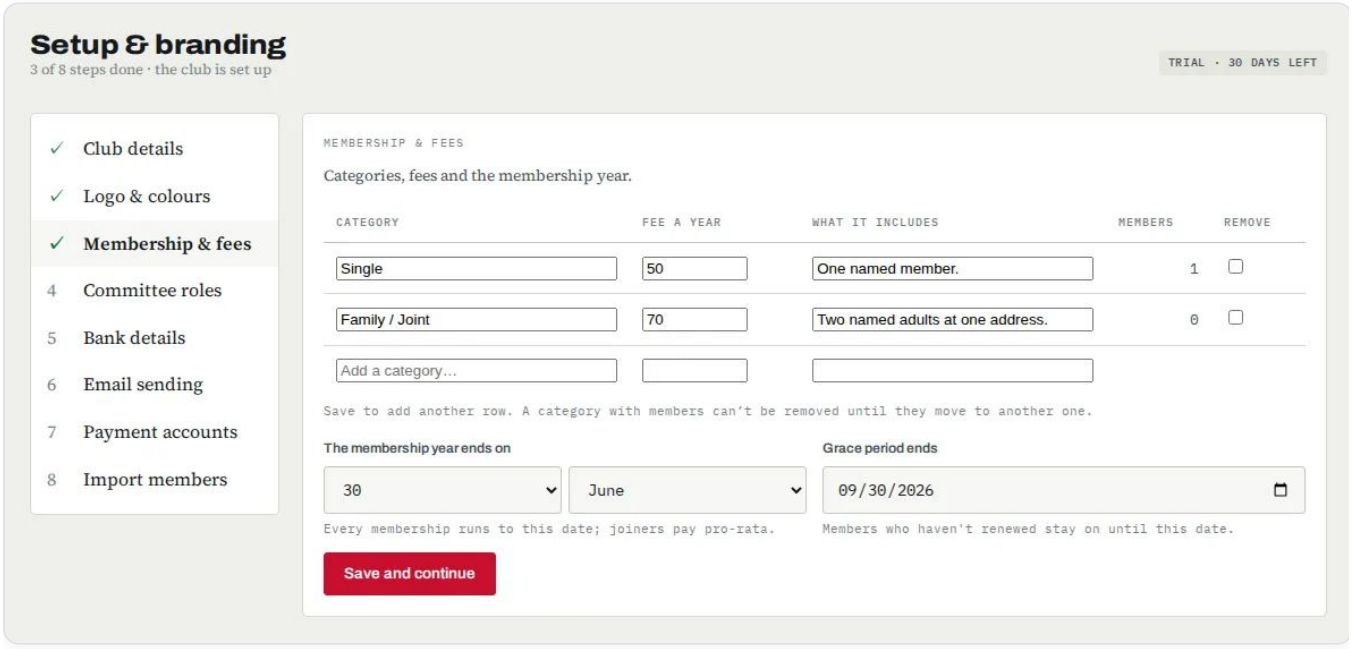
Upload the logo (PNG, JPEG or WebP up to 2 MB; a PNG with a transparent background looks best) and choose the club's colours. The layout and wording of the public site are edited separately, under **Site theme** and **Events & site text**.



Step 2: logo and colours.

3 · Membership and fees

One row per membership category: its name, the fee a year, and what it includes. Save to add another row. Then set the day the membership year ends (every membership runs to this date, and people who join part-way pay a pro-rata fee) and the date the grace period ends (members who haven't renewed stay on until then).

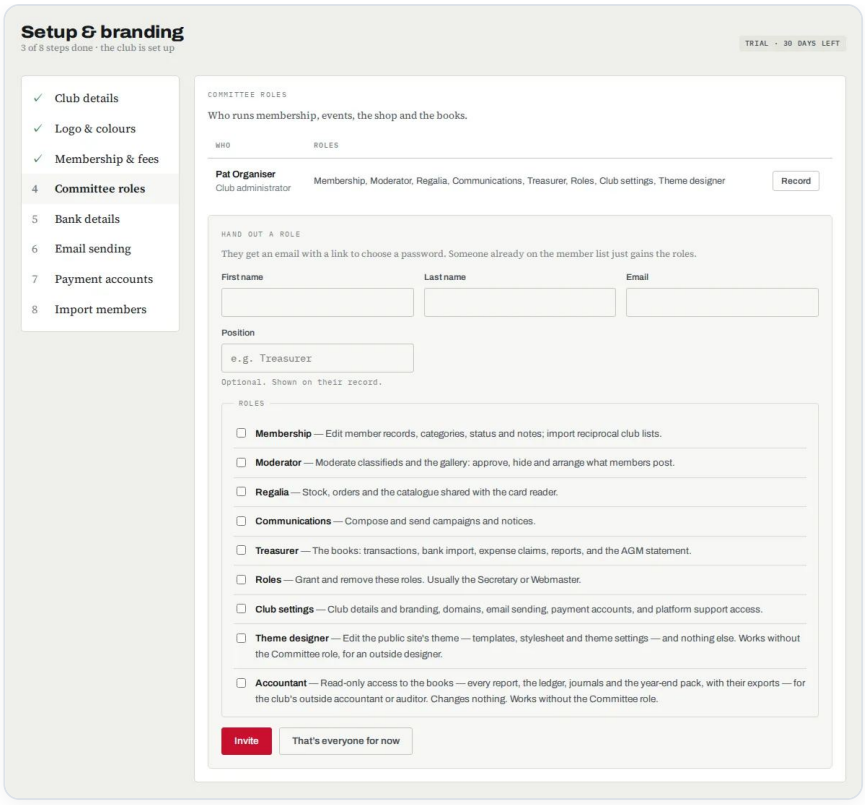


Step 3: categories, fees and the membership year.

> A category with members in it can't be removed until they have been moved to another one.

4 · Committee roles

Hand out the parts of the console. Enter a person's name, email and position, tick their roles and press **Invite**. A new person gets an email with a link to choose a password; someone already on the member list just gains the roles. When everyone is in, press **That's everyone for now**. What each role does is in Roles and access.



Step 4: inviting the committee.

> After you press Invite, the set-up link is also shown on screen, once. If the email doesn't arrive (or email isn't live yet), copy it and send it to the person yourself.

5 · Bank details

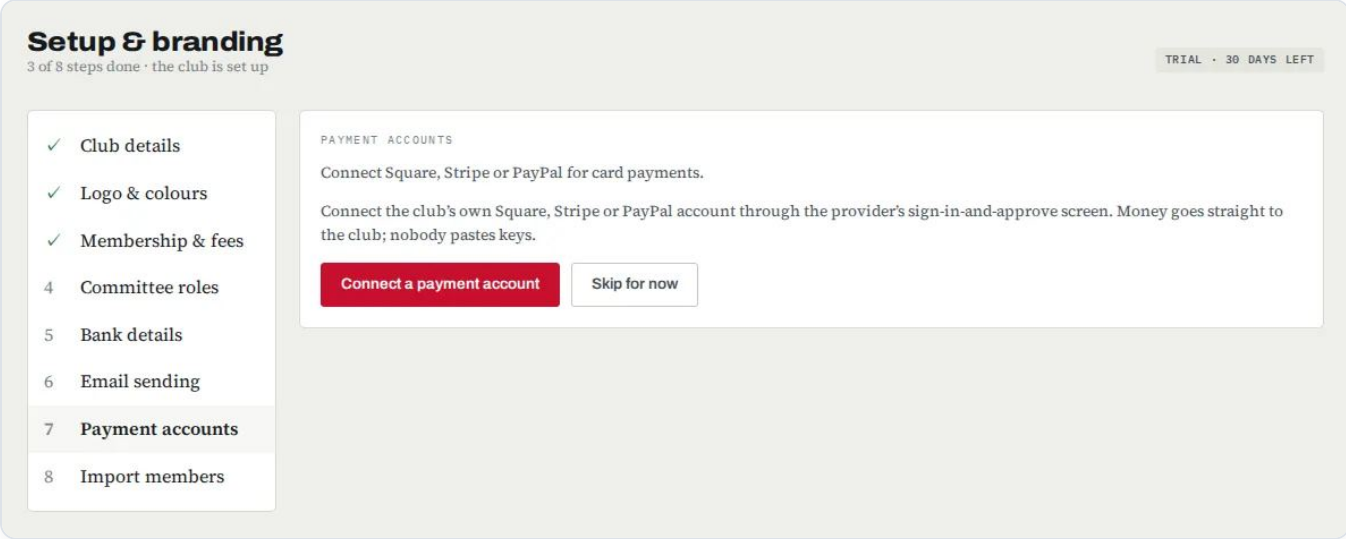
The account members pay into by direct deposit. The button opens the books' settings, which need the Treasurer role. Until it is filled in, members choosing direct deposit would see placeholder details.

6 · Email sending

Until this is done, club email goes out from the platform's address with the club's name as the sender. Setting up the club's own domain (a few DNS records) sends it from the club's address and keeps it out of spam folders. The full steps are in Running the site.

7 · Payment accounts

Connect the club's own Square, Stripe or PayPal account through the provider's sign-in-and-approve screen. Money goes straight to the club; nobody pastes keys. Until an account is connected, card payments on the site are pretend, so joining and renewing can be tried safely. Direct deposit and paying at a meeting are always offered as well.

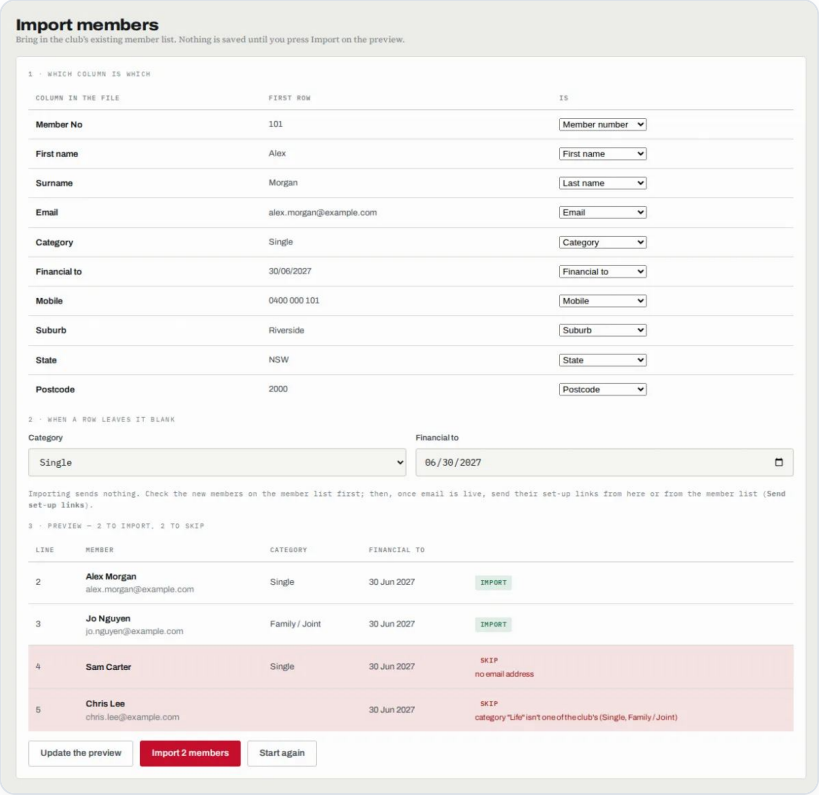


Step 7: connecting a payment account.

8 · Import members

Upload the club's member list as a CSV (a spreadsheet saved as CSV is fine). You see a preview before anything is saved:

1. Check which column is which. The import guesses from the headings; correct any it got wrong.
2. Choose what a blank category or financial-to date should mean.
3. Read the preview. Rows to be skipped say why: no email address, a category the club doesn't have, an unreadable date.
4. Press **Import**.



The import preview, with two rows to import and two to skip.

> Importing emails nobody. Check the new members on the member list first. Then, once email is live, send them their set-up links as a separate step: **Send set-up links**, on the Import members page or the member list (see below). Members without an email address are skipped by the import; add them by hand with **Add member**.

Sending set-up links

Each member imported has no password yet. A **set-up link** lets them choose one. When the members look right and email is **live**, press **Send set-up links** on the member list (or the Import members page). The panel says how many members have never signed in and what mode email is in; if email isn't live it says so plainly, because the links wouldn't reach anyone. Links go 100 at a time, last seven days, and nobody gets a second one within a day.

The exact columns the import understands are listed in Onboarding a club.

Your address and your own domain

The club's site works straight away at its address on the platform's domain, with its security certificate already in place. Most clubs later move to their own domain (for example *myclub.org.au*). The site keeps working on the platform address the whole time, so the change can be made whenever the club is ready. The steps are in Running the site.

The site’s look and words

- **Events & site text**: the home page headline and introduction, notices, and the events calendar. See Events and event day.
- **Site theme**: the layout of the public pages. Most clubs never need it; an outside designer can be given the Theme designer role. See Designing the club's website.
- **Club shop**, **Gallery** and **Classifieds** fill themselves as the committee and members use them.

Before members see it: a checklist

- The first three setup steps are ticked, and the red notice has gone.
- The public site shows the right name, logo and colours on a computer and a phone.
- The Join page lists every category with the right fee; a test join works (card payments are pretend until an account is connected).
- Bank details for direct deposit are filled in.
- Each committee member can sign in and sees only their parts of the console.
- At least two upcoming events are on the calendar.
- Email sending is set up and tested in test mode, then switched to live.
- A payment account is connected, and one small real payment has gone through and been refunded.
- Set-up links have gone to every member who has never signed in (**Send set-up links**, with email live).

Where to get help

- **Help › Manuals** in the console holds this guide and one for every role, each also as a printable PDF.
- **Platform support access** lets the platform’s support staff into your console for a few hours when you ask. They can’t see anything otherwise. See Running the site.

FOR THE CLUB SETTINGS ROLE

Running the site

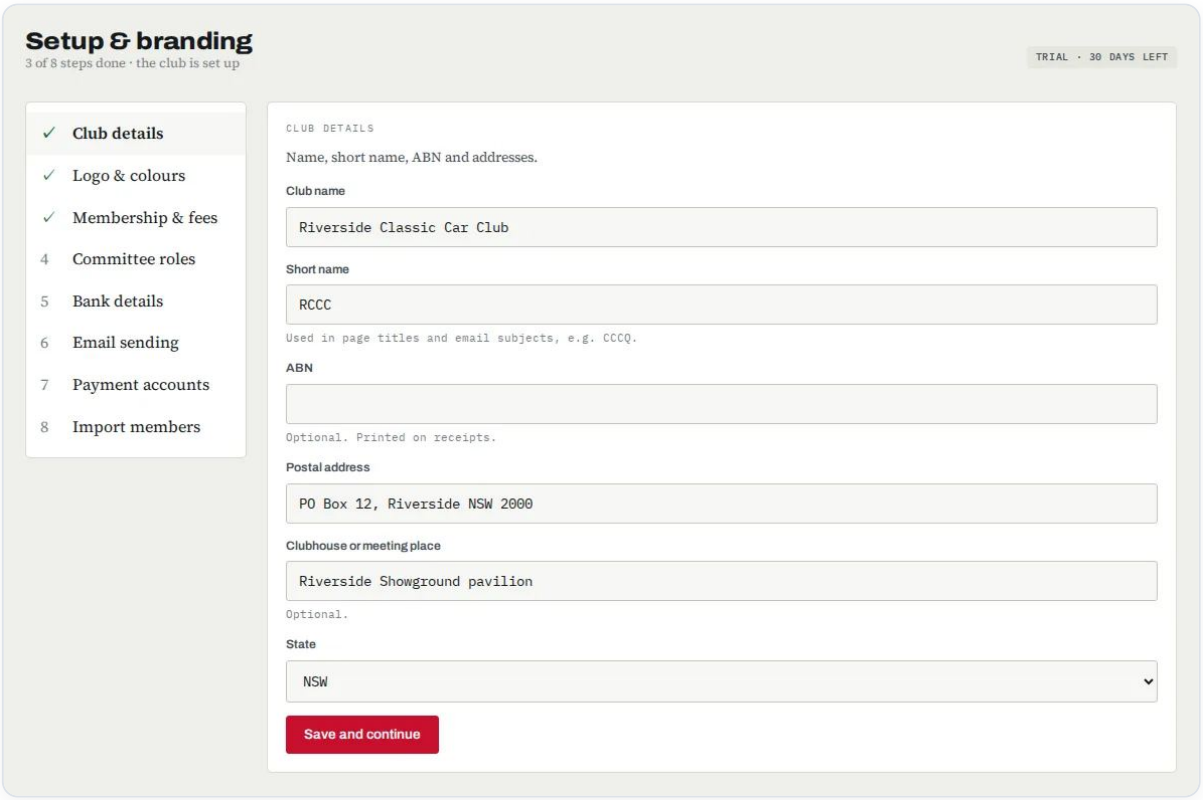
Club details and branding, the club's own domain, email sending, payment accounts, platform support access, and keeping the site healthy.

This guide is for whoever holds the **Club settings** role: usually the Secretary or the club's webmaster. It covers the settings that reach outside the club: its details and branding, its web address, how its email is sent, its payment accounts, and letting the platform's support staff in. All of them are under **Club** in the console's sidebar.

Club details and branding

Setup & branding is the setup wizard, and also where any of its answers are changed later. Its eight steps are described in Getting started with EzyClub. The ones you are most likely to revisit:

- **Club details**: name, short name, ABN, postal and clubhouse addresses, state. The ABN and addresses print on receipts and in the site's footer.
- **Logo & colours**: replace or remove the logo; change the two colours.
- **Membership & fees**: add a category, change a fee, move the end of the membership year or the grace period. A new fee applies to the next join or renewal; nobody is charged the difference.

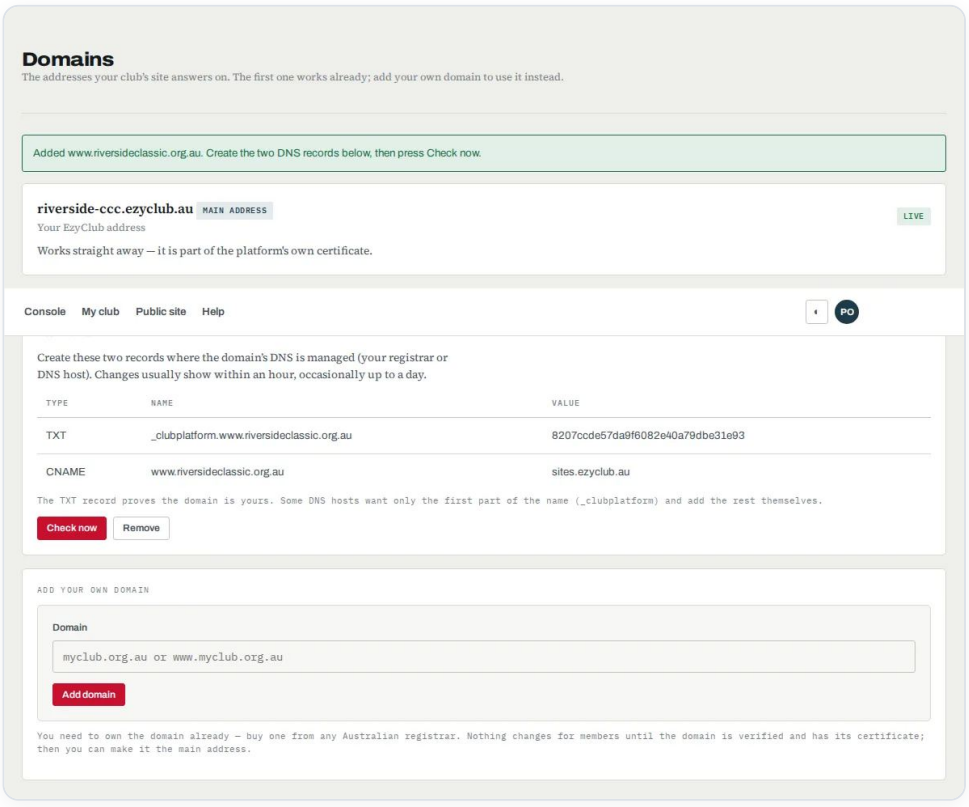


Setup & branding. The steps on the left can be opened in any order.

Your own domain

Every club works straight away at its address on the platform's domain. To use the club's own domain instead:

1. Make sure the club owns the domain, and find out who can change its DNS records (the registrar's or DNS host's control panel).
2. Open **Domains**, type the domain (for example *www.myclub.org.au* or *myclub.org.au*) under **Add your own domain**, and press **Add domain**.
3. The page shows two records. Create both at the DNS host exactly as shown:
   - a **TXT** record, which proves the domain is the club's;
   - a **CNAME** record that points the domain at the platform. A domain without www in front can't be a CNAME, so the page gives an **A** record instead.
4. Press **Check now**. Changes usually show within an hour, occasionally up to a day. The page checks again by itself and shows each try.
5. Once the domain says it is verified, a security certificate is issued for it. Until then the site keeps working on the platform address.
6. Press **Make this the main address** when it is live. Links in emails then use the club's own domain.



A new domain waiting for its two DNS records.

> Some DNS hosts want only the first part of the TXT record's name (*_clubplatform*) and add the rest themselves. If Check now keeps failing, try that.

> **Remove** stops the site answering on that domain straight away. Don’t remove the old address until the new one is primary and working.

Email sending

Every email the site sends (sign-in links, receipts, reminders, newsletters) goes through one place. **Email sending** decides who it comes from and whether it is really sent.

Who it comes from

Until the club’s own domain is set up, mail goes from the platform’s address with the club’s name as the sender, and replies go to the reply-to address you give. To send from the club’s own address:

1. Under **Your sending address**, enter the domain, the from address (for example *secretary@myclub.org.au*), the from name and, optionally, a reply-to address. Press **Save**.
2. The page lists the DNS records to create for that domain, each with its status. Create them at the DNS host.
3. The records are checked automatically. Once they are verified, mail switches to the club’s own address by itself.

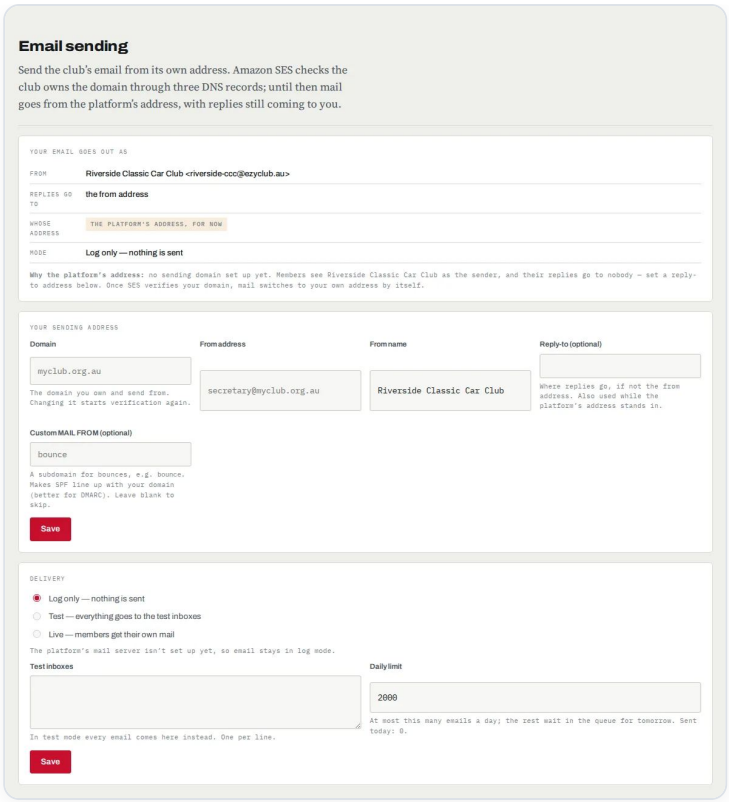
Custom MAIL FROM is optional: a subdomain such as *bounce* that makes the records line up with your domain, which helps with strict spam filters.

Test mode and live mode

Under **Delivery**, choose one of three modes:

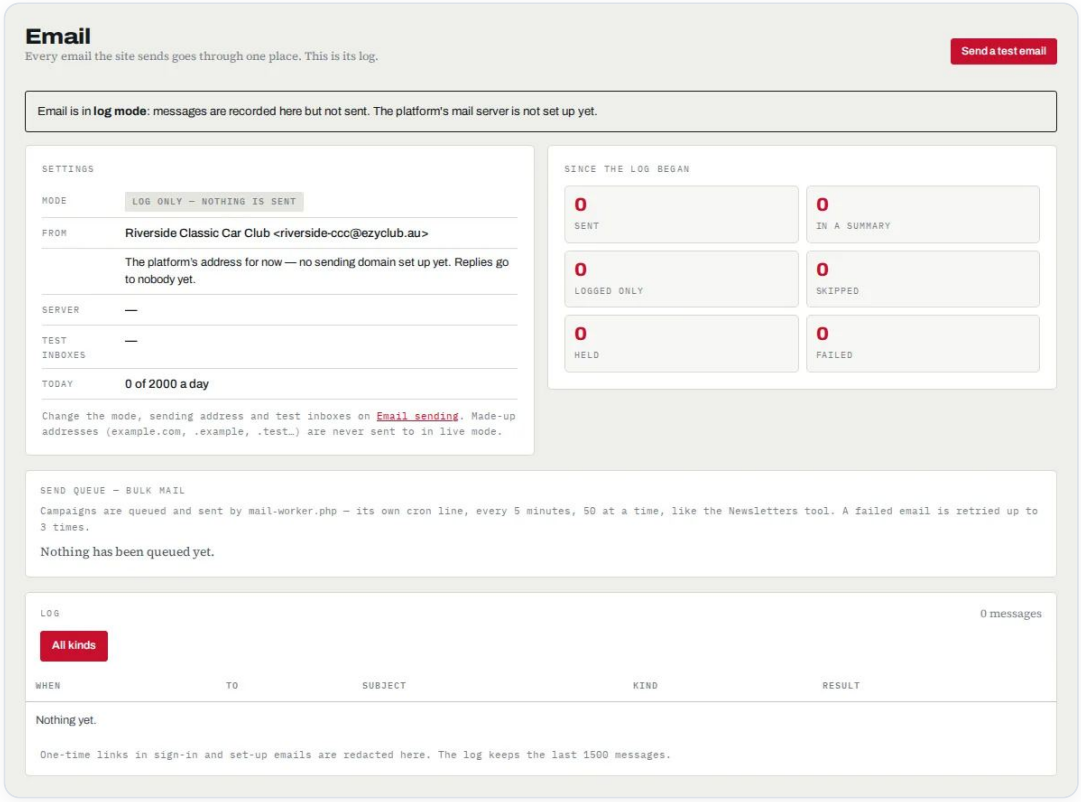
Mode	What happens
Log only	Nothing is sent. Every message is recorded on the Email page.
Test	Every message goes to the test inboxes instead, with the real recipient in the subject. Big sends send a few samples and a summary.
Live	Members get their own mail.

The **Daily limit** caps how many emails go out in a day; the rest wait in the queue until tomorrow. Made-up addresses (example.com, .test and the like) are never sent to in live mode.



Email sending: the sender, the sending address and the delivery mode.

The **Email** page (under Communications) is the log of every message: when, to whom, which kind, and whether it was sent, held or skipped, with the bulk send queue above it.

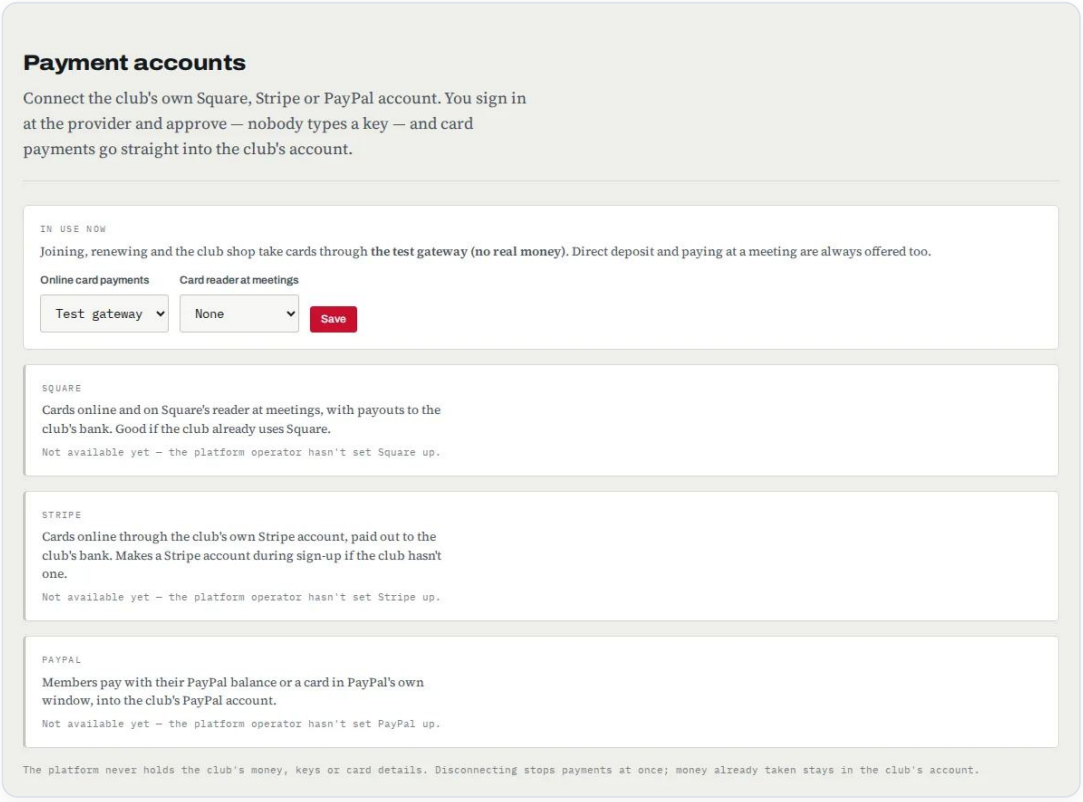


The Email page: the mode, the queue and the log.

Payment accounts

Joining, renewing, event tickets and the club shop can take cards through the club's own Square, Stripe or PayPal account. Direct deposit and paying at a meeting are always offered too.

1. Open **Payment accounts** and press **Connect** beside the provider.
2. Sign in to the club's account on the provider's own page and approve the connection. Stripe can create an account during this step if the club hasn't one.
3. Back on the page, choose which connected account takes **online card payments**, and which runs the **card reader at meetings** (Square's reader). Press **Save**. For Square, choose the location payments are taken at.



Payment accounts.

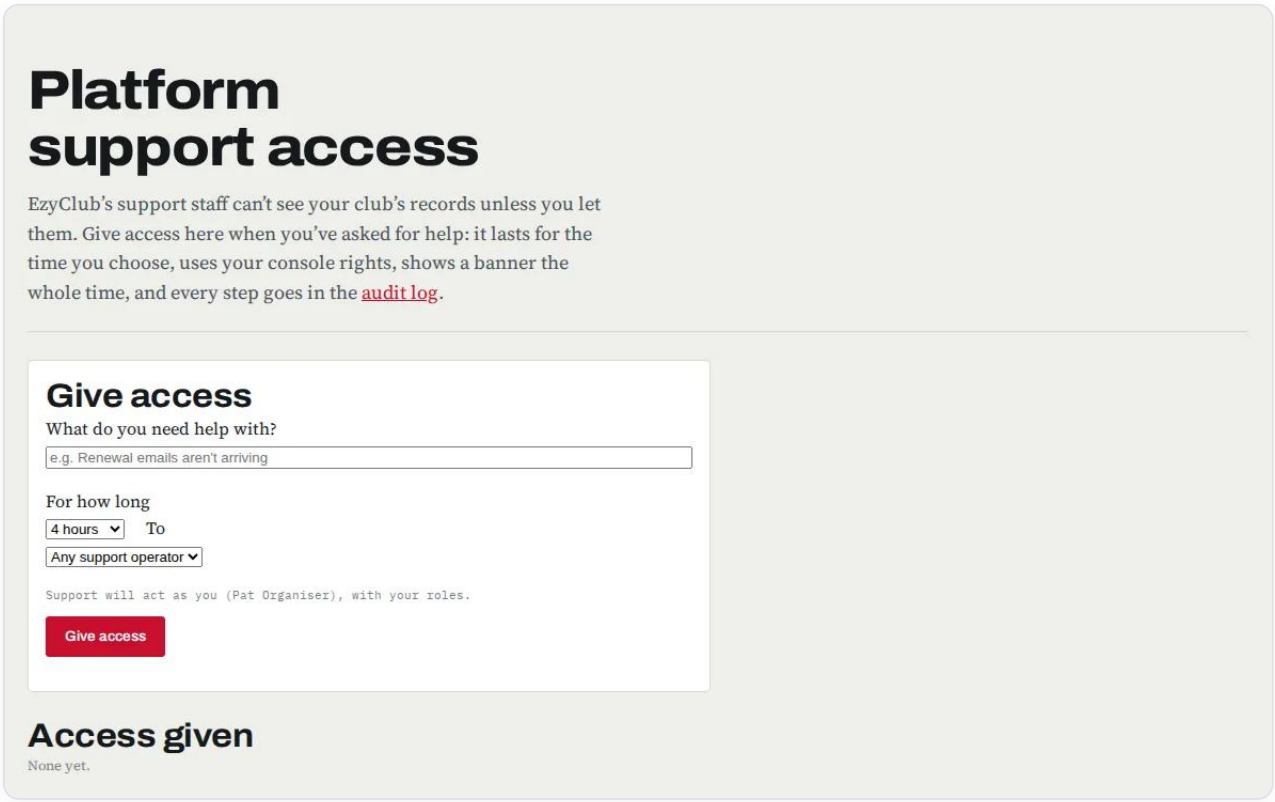
The platform never holds the club's money, keys or card details. **Disconnect** stops payments at once; money already taken stays in the club's account. A provider marked *needs attention* should be reconnected. PayPal sometimes can't receive payments until the account's email address is confirmed with PayPal; the page says so.

Platform support access

The platform's support staff can't see the club's records unless the club lets them. When you have asked for help:

1. Open **Platform support access**.
2. Say what you need help with, choose how long (four hours is the usual), and optionally a particular support person.

3 Press **Give access**.



Giving support time-limited access.

Support then works as you, with your roles, and a banner shows the whole time. Every step goes in the club's **Audit log**. The access ends when its time runs out, or straight away when you press **End now**.

What the platform operator can and can't see

- **Can see**, without asking: the club's name, status, addresses and domains, its trial or plan, and background jobs such as certificate checks.
- **Can do**, when the club's situation calls for it: send announcements to clubs, suspend a club, give notice of closure, or download the club's data export (every such download is written to the club's audit log).
- **Can't** read members' records, the books or messages unless the club gives support access, and then only as described above.
- **Never** sees passwords, payment account keys or card details.

Your data

- **Members › Export CSV** downloads the roster (needs the Membership role).
- The books export transactions as CSV, receipts as a ZIP, and the year-end pack for the accountant (Treasurer or Accountant role). See The books.
- A full export of everything the club holds (settings, members and records, as JSON) is available from the platform operator on request.

Keeping the site safe

- **Give each person only the roles their job needs**, and take roles away at hand-over time after the AGM. See Roles and access.
- **Use a strong, unique password.** After eight wrong passwords the address is locked for fifteen minutes, which slows down guessing but doesn't replace a good password.
- **Sign out on shared computers** (the avatar menu, top right, › Sign out).
- **Check the Audit log** now and then: approvals, role changes, payments and imports are all there, with who did them and when.
- **Don't share a login.** Give the helper their own member record and roles instead; outside helpers such as a web designer or the club's accountant have roles of their own that don't open the rest of the console.

FOR EVERY COMMITTEE MEMBER

The committee console

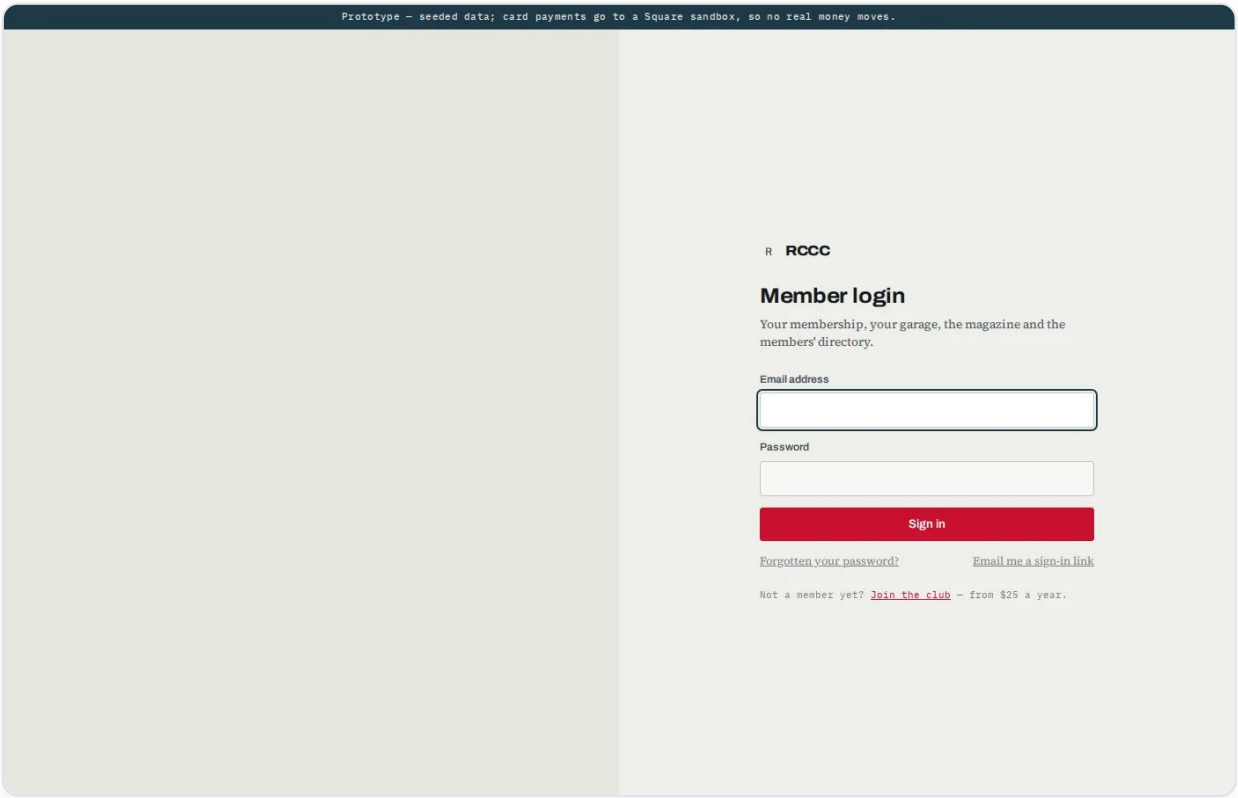
Signing in, finding your way, what each role unlocks, messages and warnings, and doing the job on a phone.

The committee console is where your club's committee runs the club: members, events, the website, newsletters, the shop and the books. Everyone on the committee gets into the console; what each person can change depends on their roles. This guide covers what every committee member needs; each role has its own guide as well.

Signing in

Committee members sign in exactly as members do, on the club's own site: **Member login**, top right.

- **With a password**: your email and password, then **Sign in**.
- **With a sign-in link**: choose **Email me a sign-in link**. One click in the email signs you in, no password needed. This is also the way back in if you have forgotten your password; set a new one from **My details** once you are in.



The sign-in page.

New committee members get an email with a set-up link to choose their password. After eight wrong passwords for one address, it is locked for fifteen minutes.

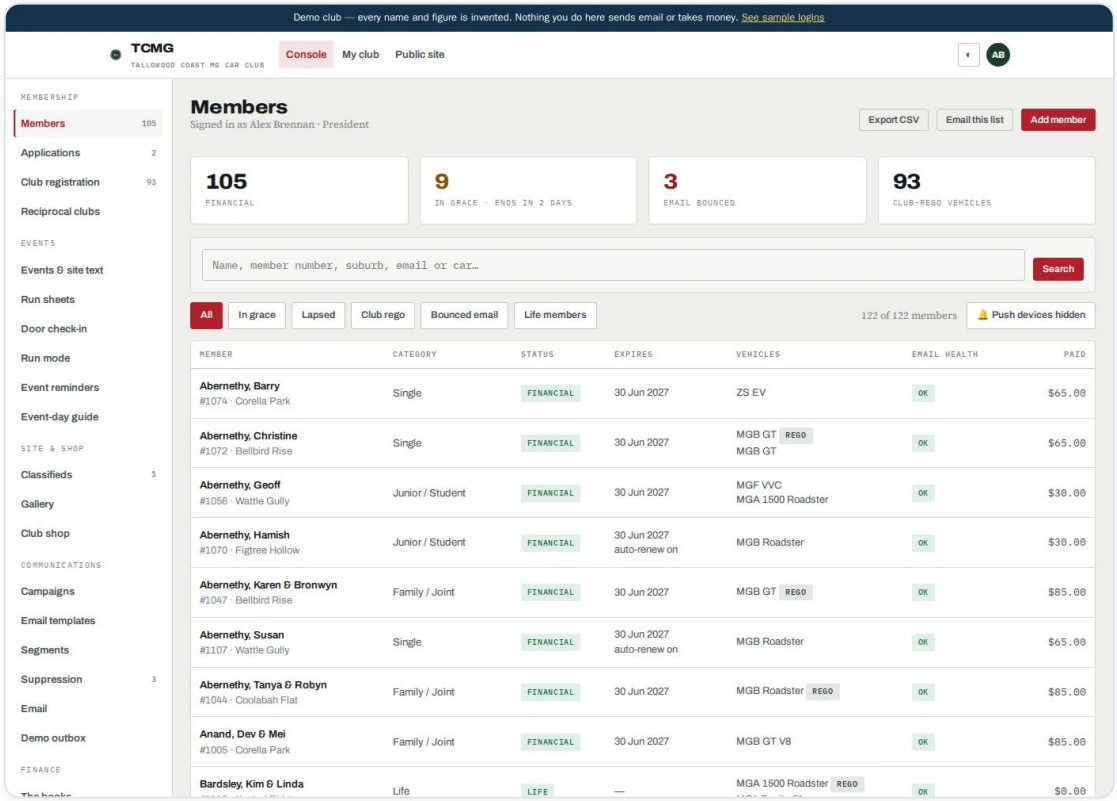
> Once signed in, the avatar with your initials (top right) opens a menu: My club, Membership card, My details, **Committee console** and Sign out.

Finding your way

The console opens on the **Members** page. The sidebar on the left lists every part of it, in groups:

Group	What is there
Membership	Members, Applications, Club registration, Reciprocal clubs
Events	Events & site text, Run sheets, Door check-in, Run mode, Event reminders, Event-day guide
Site & shop	Classifieds, Gallery, Club shop
Communications	Campaigns, Email templates, Segments, Suppression, Email
Finance	The books, Expense claim, Payments, Reconciliation, Audit log
Club	Setup & branding, Site theme, Import members, Domains, Email sending, Payment accounts, Platform support access
Help	Manuals: this library, with the guides for your roles first

Small numbers beside an item count what is waiting: applications to decide, club-registration declarations due, classifieds to moderate. A padlock marks a part your roles don’t open; opening it shows which role it needs.



The console on a computer.

Messages after you press a button

- A **green** box means it worked, and says what happened.
- A **red** box means nothing was saved. The fields that need attention are marked in red; what you typed is kept.
- An **amber** box is a warning: it worked, but look again (for example, email is in test mode).

What each role unlocks

Committee opens the console. On its own it gives a read-only view of the member roster (campaigns need Communications), plus the parts every committee member shares (below). Each further role unlocks one part:

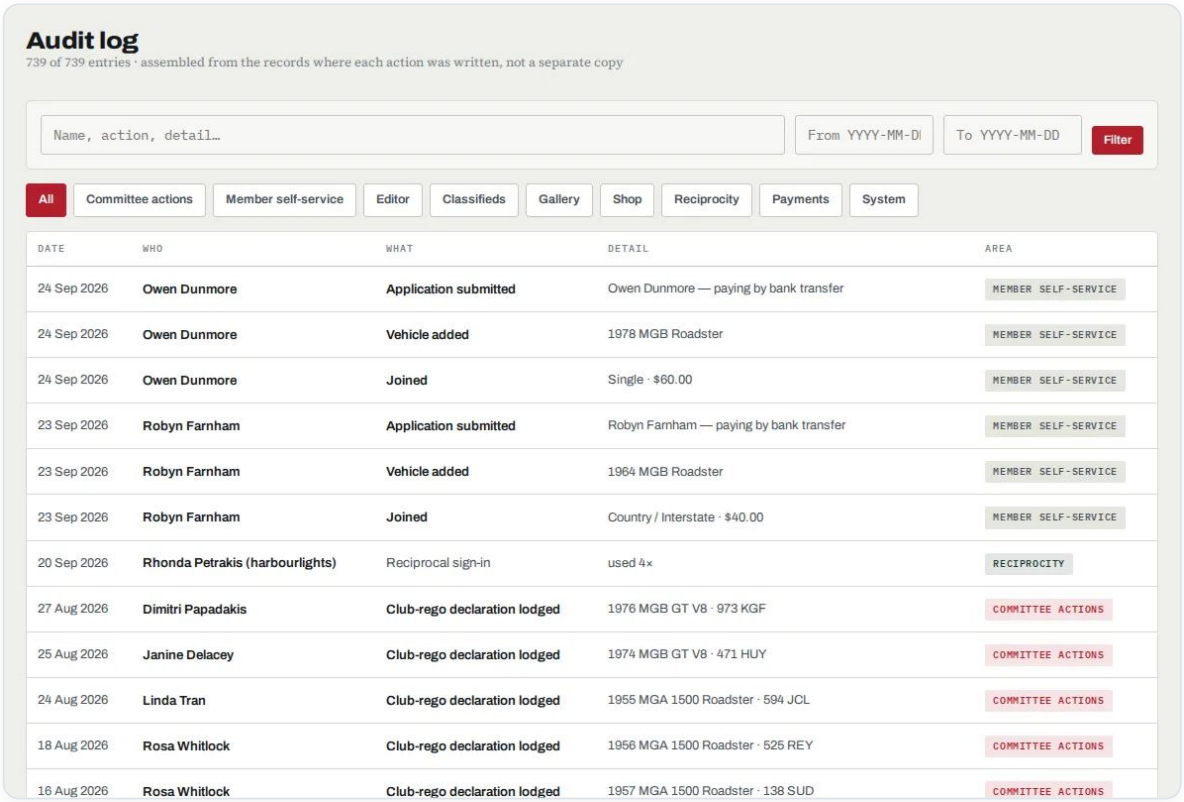
Role	What it unlocks	Guide
Membership	Edit member records, categories, status and notes; import reciprocal club lists.	Membership
Moderator	Moderate classifieds and the gallery: approve, hide and arrange what members post.	Moderating classifieds and the gallery
Regalia	Stock, orders and the shop's catalogue.	The club shop
Communications	Compose and send campaigns and notices.	Newsletters and notices
Treasurer	The books: transactions, bank import, expense claims, reports and the AGM statement.	The books
Roles	Grant and remove these roles.	Roles and access
Club settings	Club details and branding, domains, email sending, payment accounts, platform support access.	Running the site
Theme designer	The public site's theme and nothing else. Works without Committee, for an outside designer.	Designing the club's website
Accountant	Read-only access to the books, for the club's outside accountant or auditor. Works without Committee.	For the club's accountant

What every committee member can do

- **Events and the site's words**: add and change events, the home page headline and notices (Events & site text). See Events and event day.
- **Event day**: print a run sheet, work the door with Door check-in, start and watch a club run in Run mode, and check the event reminders.
- **Lodge an expense claim** with a receipt (Expense claim); the Treasurer approves and pays it.
- **Look up members**: search the roster by name, number, suburb, email or car, and read a member's record.

The audit log

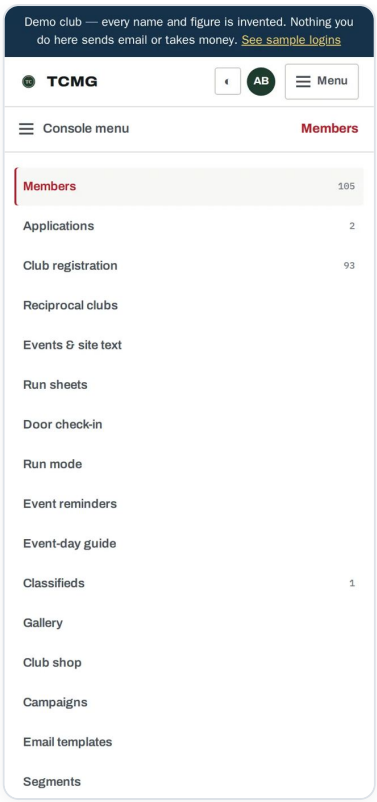
Audit log (under Finance) records who changed what, and when: approvals, role changes, payments, imports, settings, and every step taken by platform support. It can't be edited. Use it to answer "who changed this?", and look through it together now and then.



The audit log.

Using the console on a phone

Everything works on a phone. The sidebar folds away behind **Console menu** under the club's name; tap it to open the list, and tap a page to go there. Wide tables scroll sideways inside their box. Door check-in and Run mode are designed for phones first.



The console menu on a phone.

FOR THE ROLES ROLE

Roles and access

Who can do what, granting and removing roles, outside helpers (theme designer, accountant), and good practice.

Roles decide what each person can do in your club’s console. They belong to the person, not to a shared login, so everyone signs in as themselves and the audit log always shows who did what. This guide is for whoever holds the **Roles** role, usually the Secretary or the webmaster.

The roles

Role	What it unlocks
Committee	Opens the console. On its own: a read-only view of the member roster (not campaigns — that's Communications), plus events, site text, event-day tools and expense claims, which the whole committee shares.
Membership	Edit member records, categories, status and notes; applications; club registration; imports; reciprocal clubs.
Moderator	Classifieds and the gallery: approve, hide and arrange what members post.
Regalia	The club shop: products, stock and orders.
Communications	Compose and send campaigns and notices.
Treasurer	The books: transactions, bank import, expense claims, reports, year end and the AGM statement.
Roles	Grant and remove roles.
Club settings	Club details and branding, domains, email sending, payment accounts, platform support access.
Theme designer	The public site’s theme: templates, stylesheet and theme settings.
Accountant	Read-only access to the books (every report, the ledger, journals and the year-end pack, with exports), for the club’s outside accountant or auditor. Changes nothing.

A person can hold any mix. Every club divides the work differently; this is a common starting point:

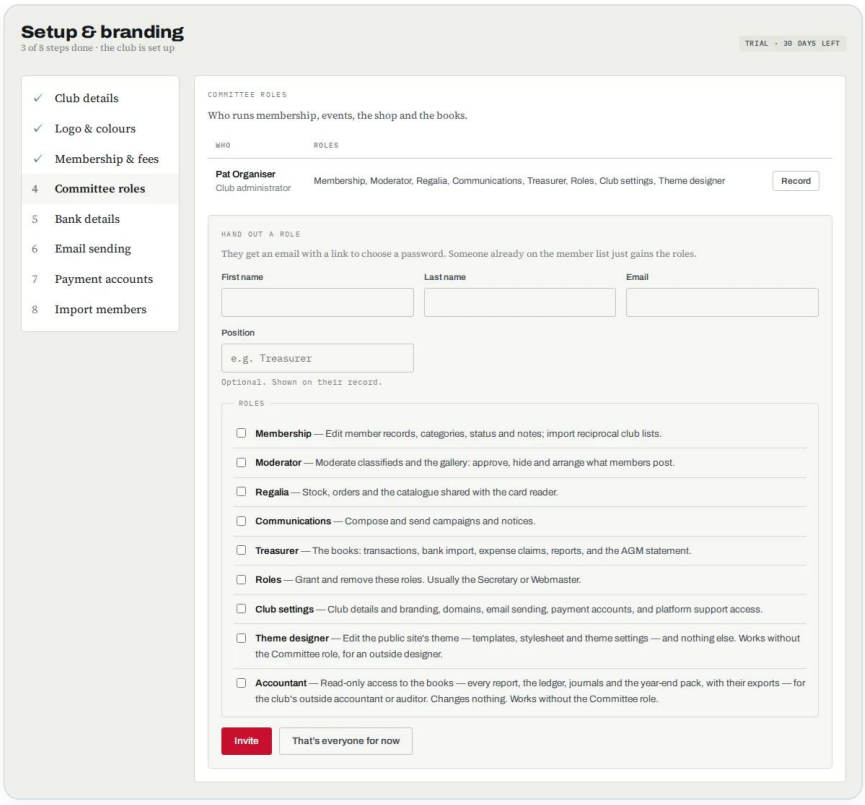
Position	Usual roles
President	Committee; often Roles as a second holder
Secretary	Membership, Communications, Roles, Club settings
Treasurer	Treasurer; Regalia if they also run the shop
Membership Registrar	Membership
Events Coordinator	Committee (events are open to the whole committee)
Newsletter or Magazine Editor	Communications, Moderator
Regalia Officer	Regalia
Webmaster	Club settings, Moderator; Roles as a second holder
General committee	Committee
The club's accountant or auditor	Accountant only

Giving someone a role

Someone new to the club

1. Open **Setup & branding** and choose step 4, **Committee roles**.
2. Under **Hand out a role**, enter their first and last name, email and (optionally) position.
3. Tick their roles and press **Invite**.

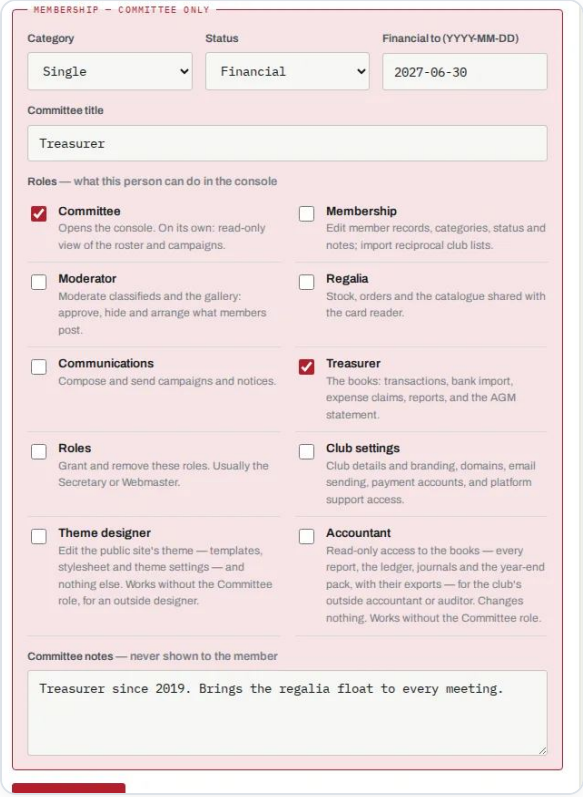
They get an email with a link to choose a password. The link is also shown on screen once, in case the email doesn't arrive. If the email address already belongs to a member, that member simply gains the roles. The setup wizard needs the Club settings role as well as Roles; without it, add the person as a member first (**Members › Add member**) and give the roles on their record.



Handing out roles from the setup wizard.

Someone already on the member list

1. Open **Members**, find the person and open their record.
2. In the red **Membership — committee only** box, tick or untick their roles, and set their committee title if you like.
3. Press **Save changes**.



Roles on a member's record.

This needs both the Roles role (to change roles) and the Membership role (to open member records). A change takes effect on the person's next click, whether you add or remove, and goes in the audit log.

> Ticking any console role also gives **Committee**, so the person gets into the console. The two outside-helper roles are the exception: **Theme designer** and **Accountant** each work on their own, without Committee, so an outside designer or accountant sees only their part and nothing else of the console.

Taking a role away

1. Open the person's member record.
2. Untick the roles they no longer need. Untick **Committee** as well, and every other role, to take them out of the console altogether.
3. Press **Save changes**.

Nobody can remove their own Roles role; another holder has to. That way the club can't accidentally lock itself out.

Outside helpers

Two roles are meant for people who aren't on the committee. Each is given on a member record like any other role, so the helper needs a record of their own. Add them with **Add member**, in a category that suits (many clubs keep an honorary one), rather than sharing someone's login.

- **Accountant** works on its own, without Committee: the person sees only the books, read-only, and can download the reports and the year-end pack. See For the club's accountant.

- **Theme designer** edits the public site's theme. See the warning above and Designing the club's website.

Good practice

- **Least is best.** Give each person the roles their job needs, and no more.
- **Two people with Roles.** If the only holder is away or leaves, nobody can change anyone's access.
- **Hand over at the AGM.** After each election, add the new office bearers' roles and remove the outgoing ones' the same week.
- **No shared logins.** Each person signs in as themselves, so the audit log means something.
- **Review twice a year.** Members › open each committee member's record and check their roles still match their job.

FOR THE MEMBERSHIP ROLE

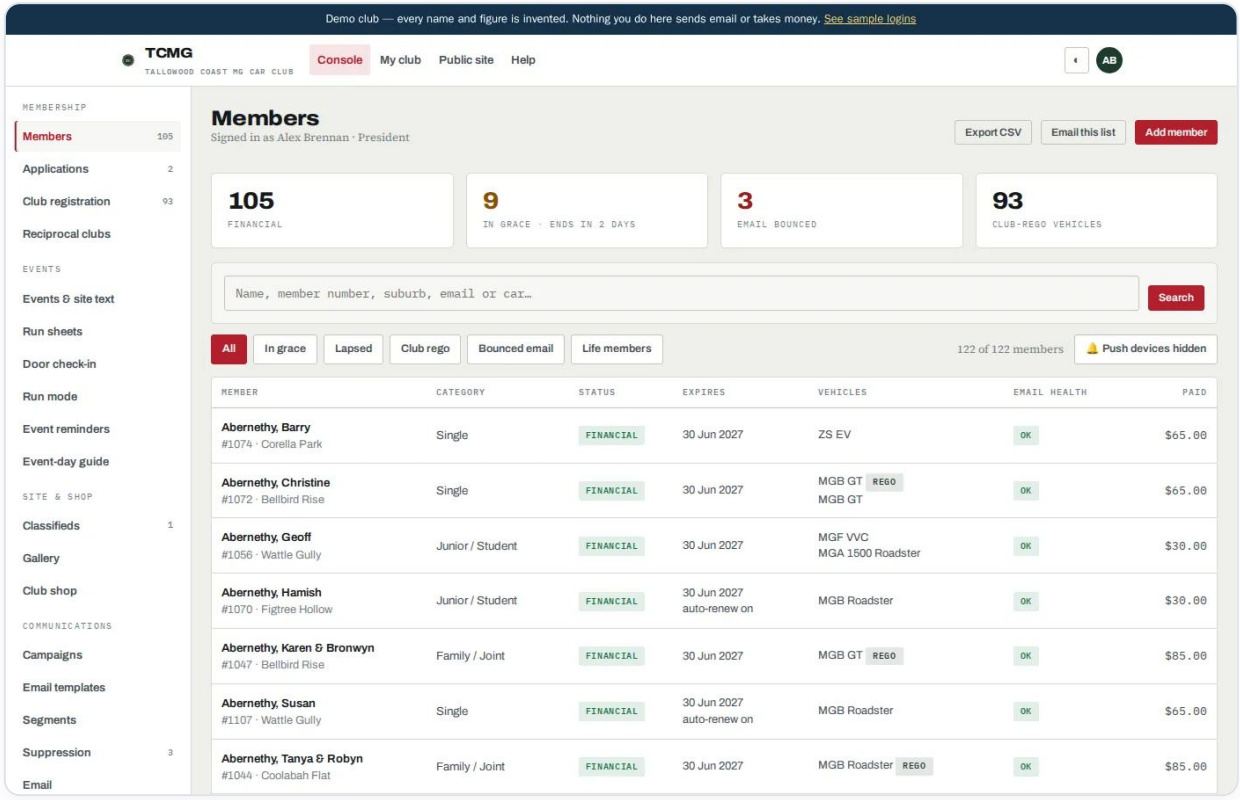
Membership

The member roster, applications, renewals and the grace period, adding members at a meeting, club registration, importing, reciprocal clubs.

The Membership role looks after the member list: the records themselves, applications from the website, renewals and payments taken by hand, the concessional-registration roster, partner clubs and imports. Everything is under **Membership** in the console sidebar. Other committee members can read the roster; only the Membership role can change it.

The member list

Membership → Members is the roster, and the first page of the console. The tiles across the top count financial members, those in the grace period (and how long it has left), bounced email addresses and vehicles on club registration.



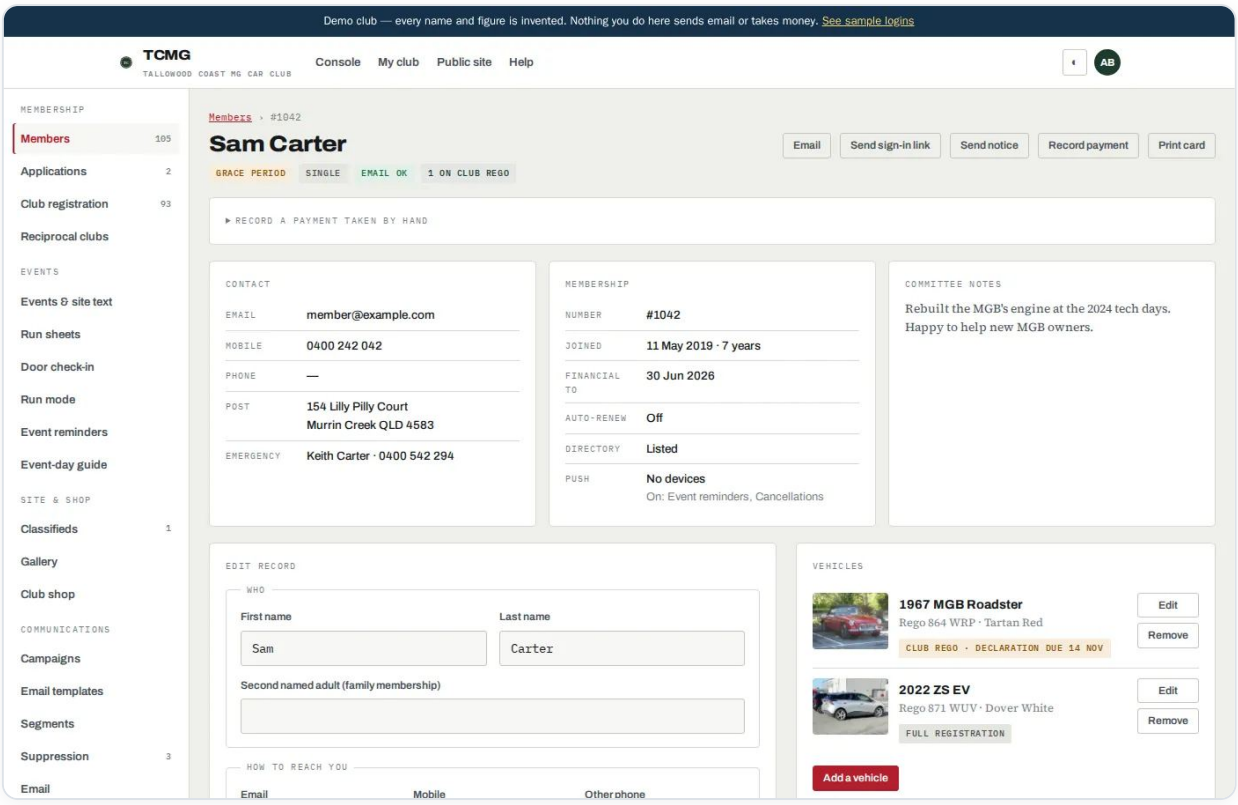
The member list. Click a name to open the record.

- **Search** finds a member by name, member number, suburb, email or car.
- The chips narrow the list: **In grace**, **Lapsed**, **Club rego**, **Bounced email** and **Life members**. The count beside them says how many of the whole list are showing.
- **Push devices** adds a column showing which phones each member has signed up for notifications. Press it again to hide it.

- **Export CSV** downloads the list. **Email this list** opens Campaigns, where a message is written and sent to a segment (it needs the Communications role).

A member’s record

Click a name to open the record. The badges under the name show the status, category, email health and club-rego vehicles. Below are the contact details, the membership panel (number, joined, financial-to date, auto-renew, directory listing, push), committee notes, the edit form, vehicles and a dated history of everything that has changed.



A member’s record. The buttons across the top do the common jobs.

The buttons across the top:

Button	What it does
Email	Opens your own email program, addressed to the member.
Send sign-in link	Emails a one-time link that signs them in. The quickest fix for a forgotten password.
Send notice	Opens Campaigns, to write a notice by email and push (needs the Communications role).
Record payment	Opens **Record a payment taken by hand** (see below).
Print card	A printable membership card with the same check-in code as the card on their phone.

To change a member’s details

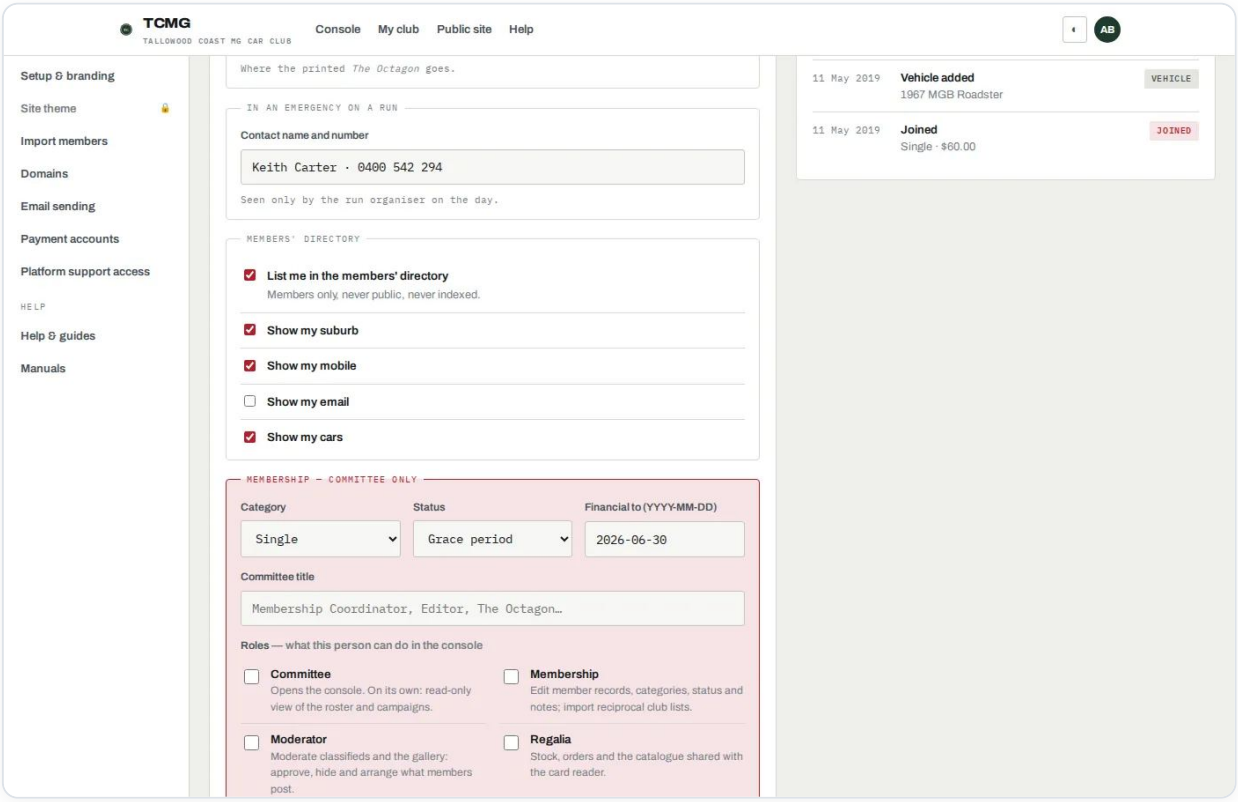
1. Open the record and scroll to **Edit record**.

2. Change the name, contact details, postal address, emergency contact or directory settings.
3. Press **Save changes**. Every save is dated in the history at the bottom.

> If you change someone's email address, the new address is confirmed by email before it takes over, and their sign-in moves with it.

The committee-only fields

The **Membership — committee only** section holds the member's category, status, financial-to date, committee title and private committee notes. The member never sees these. The tick boxes for console roles are here too, but only someone with the Roles role can change them — see Roles and access.



Category, status, financial-to date and roles.

Vehicles

Under **Vehicles**, press **Add a vehicle** or **Edit** beside one. Each car can have up to 12 photos; location data is stripped from every photo on the way in. A car on concessional registration shows its declaration due date here and on the club-rego roster.

Payments taken by hand

When a member pays cash at a meeting, by bank transfer or by EFTPOS, record it on their record so the membership moves on and the Treasurer sees it in the books.

1. Open the member and press **Record payment**.

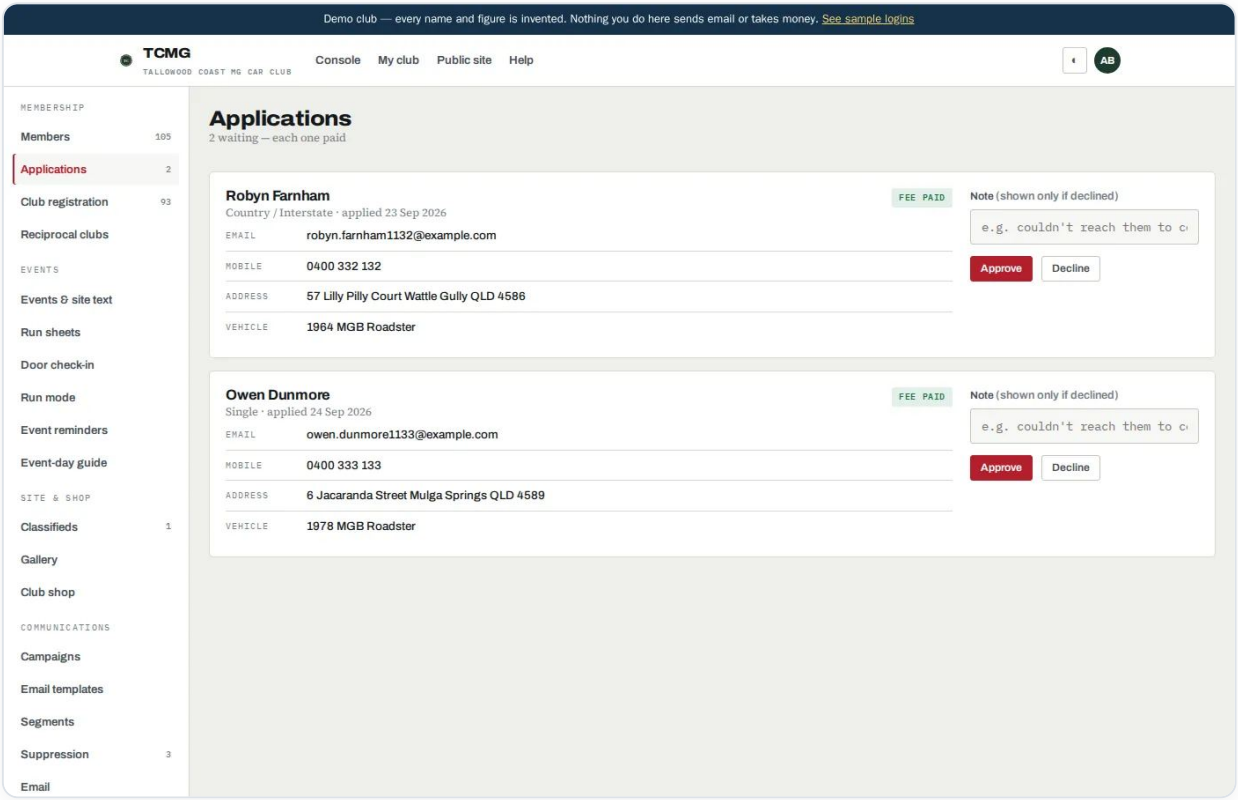
2. Check the amount, choose the **Method** (Cash, Bank transfer or EFTPOS at the meeting) and what it is **For**: **Renewal — extends a year**, **Joining fee** or **Something else**.
3. Press **Record**. A renewal moves the financial-to date on a year and the payment goes on the club's ledger with your name.

> Renewals open 60 days before a member's financial-to date. If you take money earlier than that, the form asks you to tick **Record anyway**, and the early renewal is noted in the audit log.

Members who chose to pay by direct deposit or at a meeting when renewing online wait under **Finance** → **Payments** → **Awaiting payment** until the Treasurer marks them paid.

Applications

Membership → **Applications** lists people who applied through the website's Join page: their category, contact details, address and car. The number in the sidebar says how many are waiting.



Applications waiting for a decision.

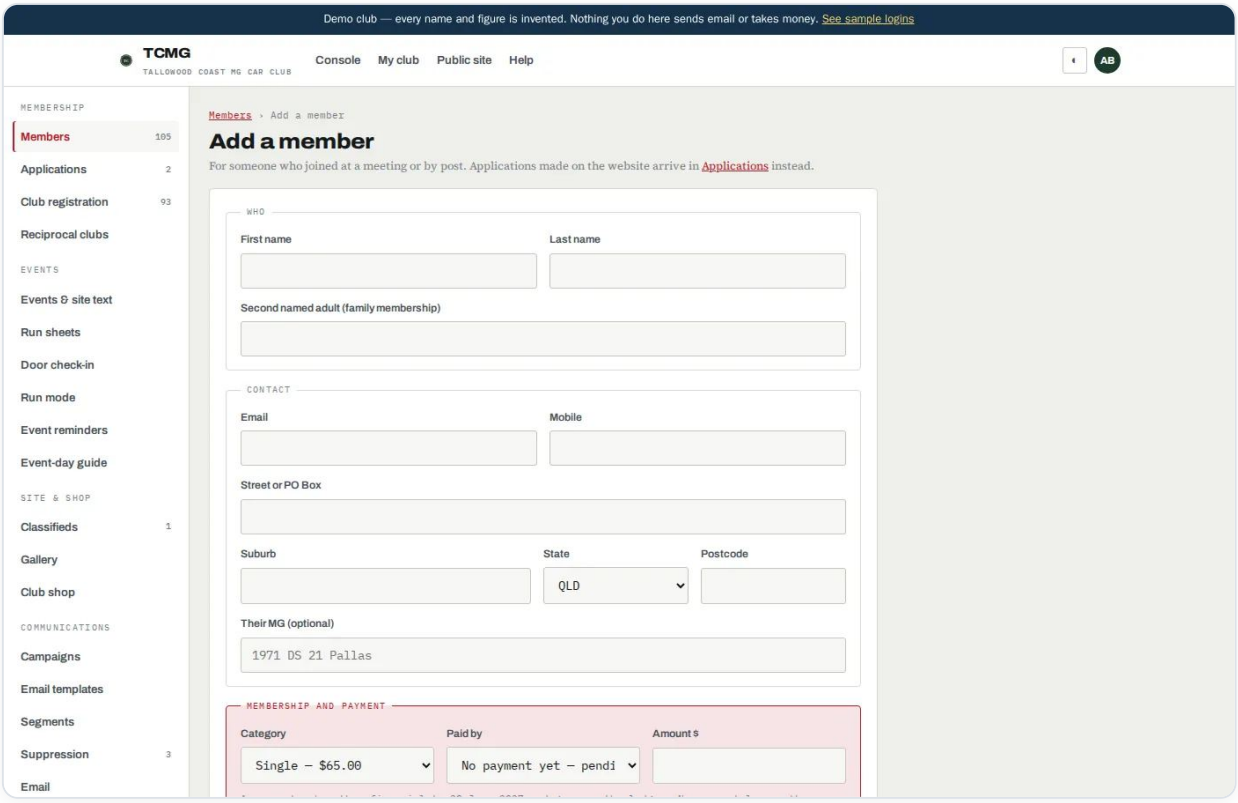
1. Read the application. **Fee paid** means the card payment went through when they applied.
2. Press **Approve**. They become financial to the end of the membership year and are emailed a link to choose a password. The link is also shown to you once, in case the email goes astray.
3. Or type a **Note** and press **Decline**. They are emailed with your note, and an unpaid joining fee comes off the awaiting-payment list.

> Declining does not refund a fee already paid by card. Tell the Treasurer, who refunds it through the club's card provider.

> If an applicant chose to pay by direct deposit or at a meeting and hasn't yet, the application says the fee isn't paid. You can still approve; the console asks you to confirm first.

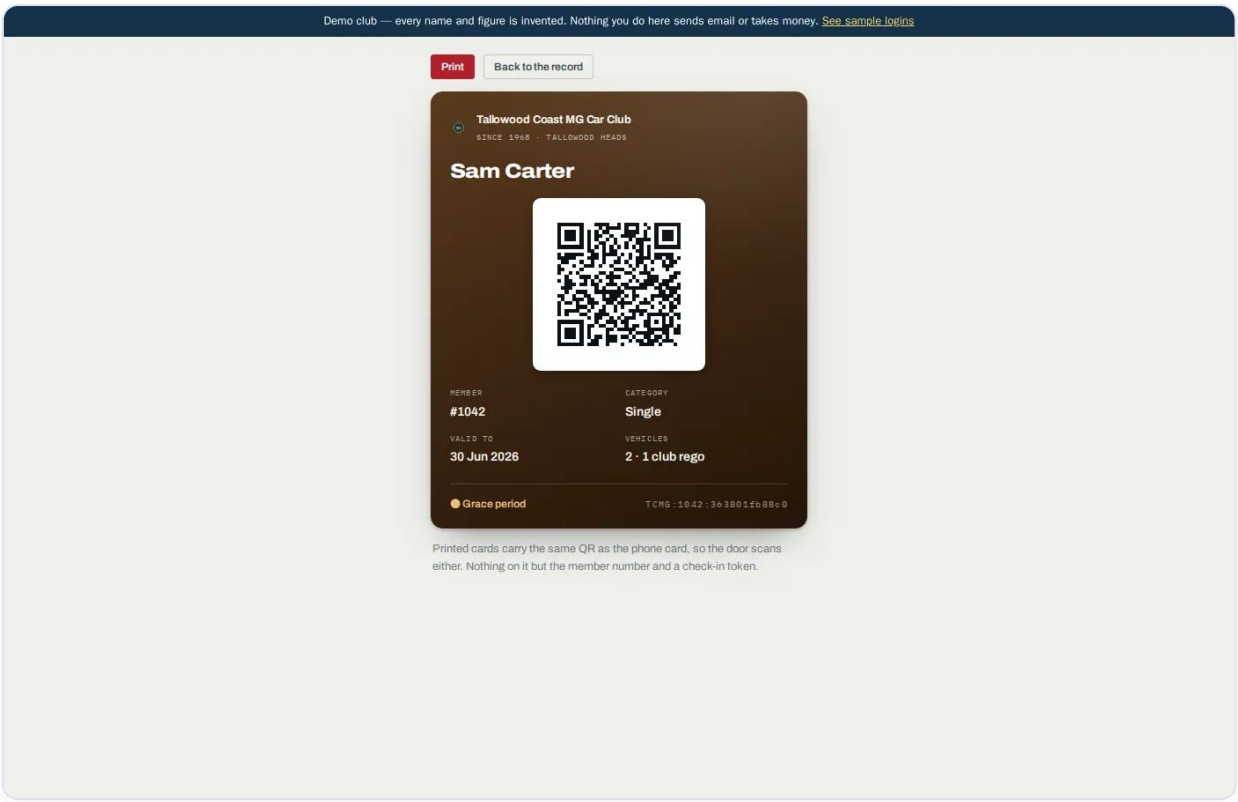
Adding a member at a meeting

For someone who joins at a meeting, a show or by post, use **Add member** on the member list.



Adding a member by hand.

1. Fill in their name (and the second named adult for a family membership), contact details and postal address. Their car is optional.
2. Choose the **Category**, then how they **Paid by**: Cash, Bank transfer, EFTPOS at the meeting, or **No payment yet**.
3. Press **Add member**. A payment makes them financial to the end of the membership year and goes on the ledger; no payment leaves them pending, like a website application.
4. Open their record and press **Print card** if they want a card on the spot.



The printed card carries the same check-in code as the one on the member's phone.

A new member with an email address gets a one-time link to choose their password. If the email doesn't arrive, open their record and press **Send sign-in link**.

Renewals, the grace period and lapsed members

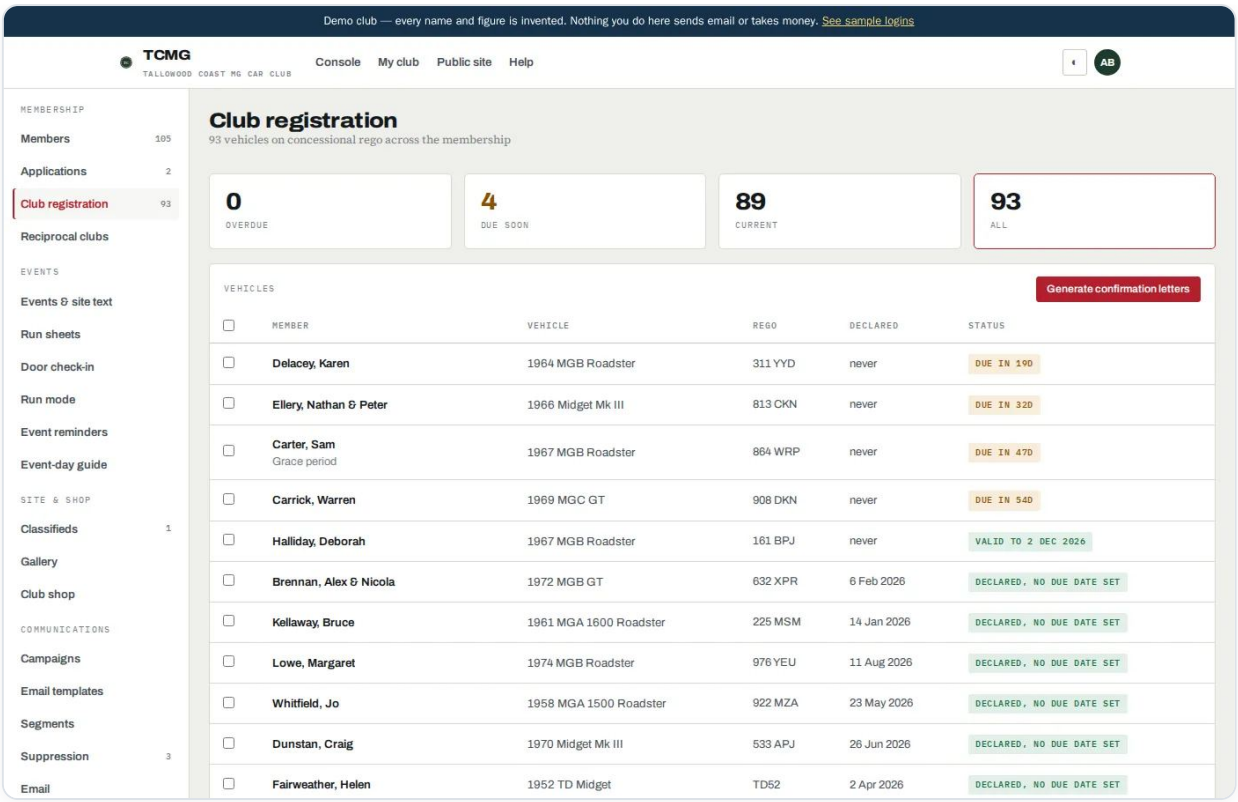
Every membership runs to the end of the club's membership year, set in **Setup & branding**. Members can renew online from 60 days before that date; the site reminds them on their phone and by email at 30, 14 and 3 days out, and members with auto-renew on are charged automatically.

- **Grace period** — a member who hasn't renewed by their financial-to date stays on as *in grace* until the grace-period end date the club has set. They can still come to events and renew straight away. The **In grace** tile shows how long is left.
- **Lapsed** — after the grace period, a member who still hasn't renewed is lapsed. Change their **Status** in the committee-only section when the committee decides they have gone.
- **Life members** never expire and never pay.

> The **In grace** and **Lapsed** segments under Communications are ready-made lists for a renewal reminder.

Club registration

Membership → Club registration is the concessional (historic or club) registration roster: every vehicle on it, whether its annual declaration is overdue, due soon or current, and when it was last declared. Members submit their declaration from their own My club page.

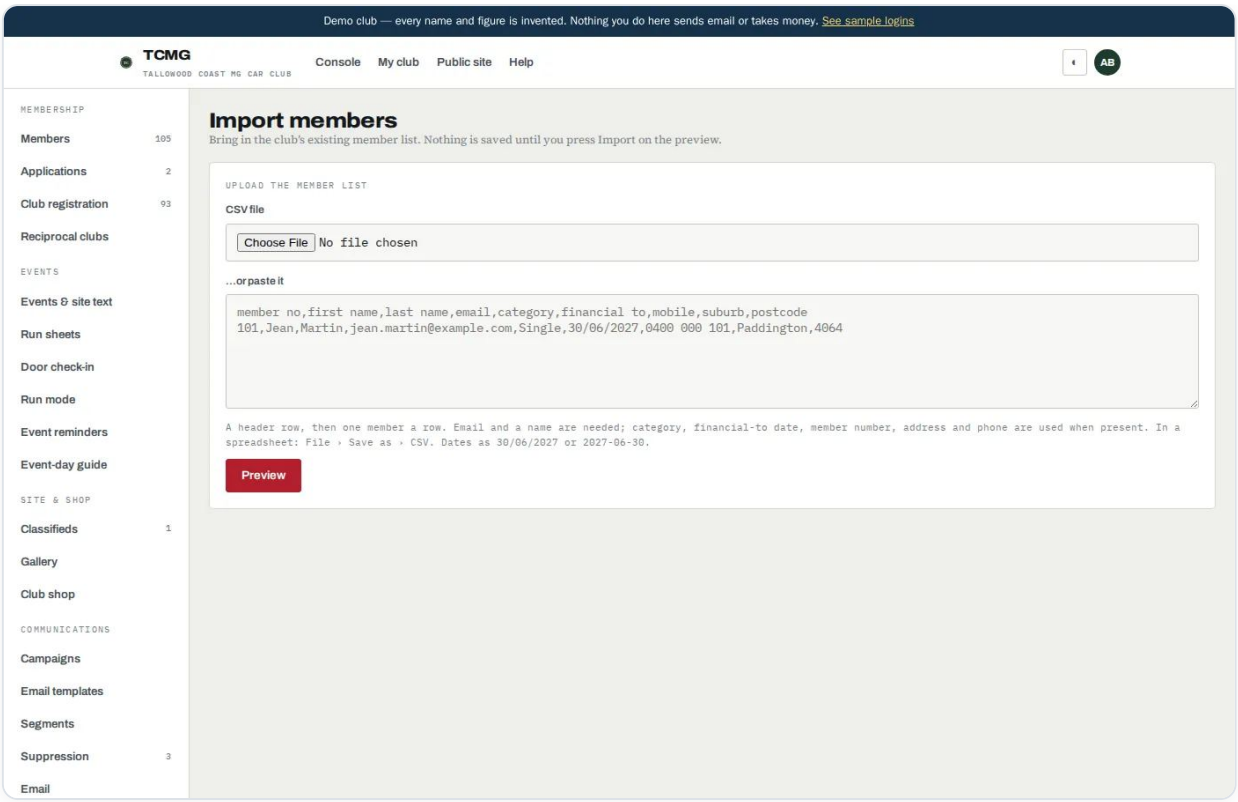


The club-registration roster, most urgent first.

1. Use the tiles to show **Overdue**, **Due soon**, **Current** or **All**.
2. Tick the vehicles that need a confirmation letter for the registry.
3. Press **Generate confirmation letters** and print the batch.

Importing members

Club → Import members brings in an existing member list from a spreadsheet. Nothing is saved until you have seen a preview.



Importing a member list.

1. Save the list from the spreadsheet as CSV (File → Save as → CSV): a header row, then one member a row. Email and a name are needed; category, financial-to date, member number, address and phone are used when present. Dates as 30/06/2027 or 2027-06-30.
2. Choose the file (or paste it) and press **Preview**.
3. Check the preview, then press **Import**. Importing emails nobody.
4. Review the new members on the member list before anyone is contacted.

> Importing is usually a one-off when a club moves across. Getting started with EzyClub covers it as part of setting up.

Sending set-up links

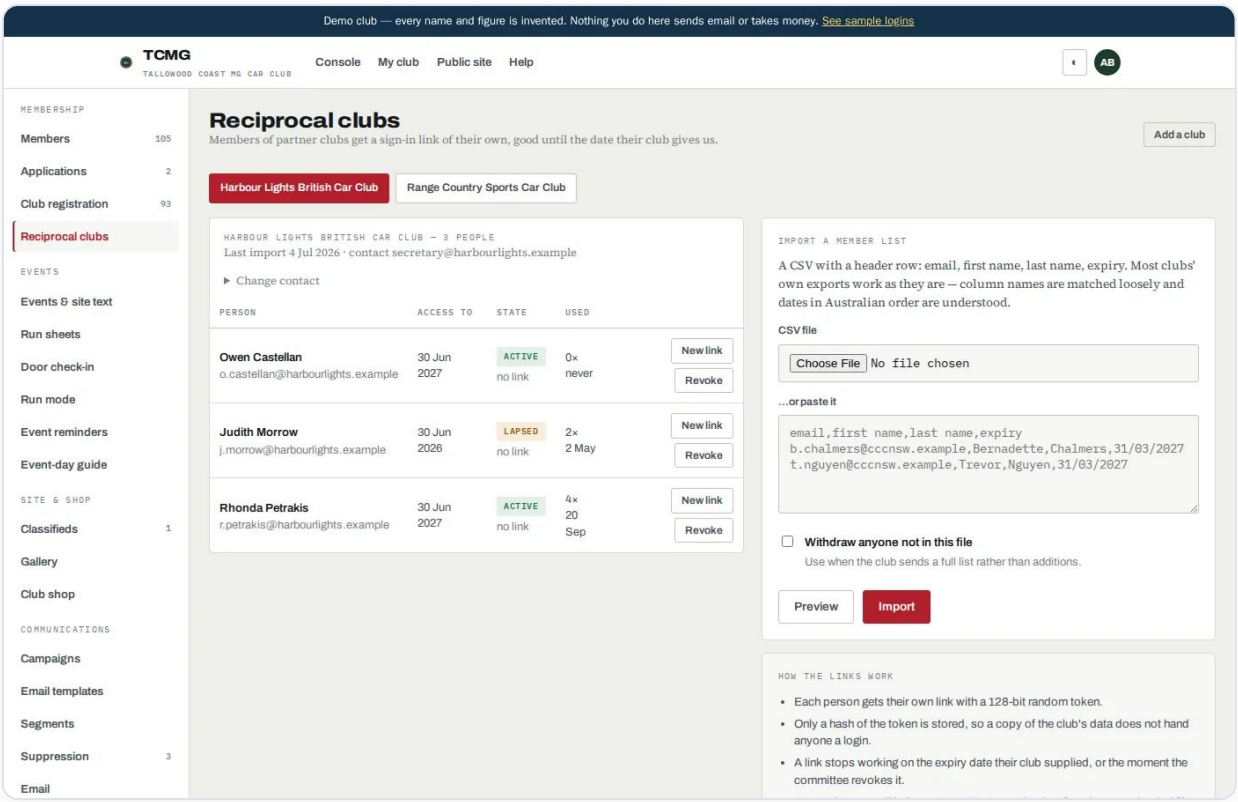
Members who have never signed in have no password yet. A set-up link lets each one choose a password. Sending them is a separate step from importing, so the list can be checked first and the links go only once email is live.

1. Open the member list (or **Import members**). A panel, **Members who have never signed in**, shows how many there are and what mode email is in.
2. If it says email is not live, stop: in test mode the links go to the test inboxes, not the members. Ask whoever holds Club settings to switch email to live first.
3. Press **Send set-up links to the next 100**. Press again for the next 100 until none are left.

Nobody is sent a second link within a day, members without an email address are listed so they can be added, and each send is recorded in the audit log. A link lasts seven days; after that, **Send sign-in link** on the member's record sends a fresh one.

Reciprocal clubs

Members of partner clubs can have a sign-in of their own that lets them see the library, events, classifieds, gallery and shop — never the members' directory, member records or the console. Each person's access lasts until the expiry date their own club gives.



A partner club and its people.

1. **Add a club**: its name and the secretary's email. Do this only after both committees have agreed.
2. Under **Import a member list**, choose the partner club's CSV (email, first name, last name, expiry — most clubs' own exports work as they are), press **Preview**, then **Import**. Tick **Withdraw anyone not in this file** when the club sends a full list rather than additions.
3. Each person gets a link, shown once. Send it to them.

New link replaces someone's link (the old one stops working); **Revoke** stops it at once. A row whose email belongs to one of your club's own members is refused, so an imported file can never open a real member's account.

Exports and the audit log

- **Export CSV** on the member list downloads the roster — for a mailing house, the AGM roll or the club's own records. Keep it somewhere safe: it holds personal details.

- **Finance → Audit log** records who changed what and when: approvals, role changes, payments and imports. Search it when someone asks “who changed this?”.

Quick answers

If…	Then…
A member has forgotten their password	Open their record and press **Send sign-in link**, or ask them to use **Forgotten your password?** on the sign-in page.
A member can’t renew online	Renewals open 60 days before their financial-to date; the renewal page says when. To take money earlier, use **Record payment** and tick **Record anyway**.
A member paid by bank transfer	If they renewed online choosing direct deposit, the Treasurer marks it paid under **Payments → Awaiting payment**. Otherwise use **Record payment** on their record.
Someone’s email keeps bouncing	Use the **Bounced email** chip to find them, ring them for the right address, and fix it on their record.
You can’t change a member’s roles	That needs the Roles role. See Roles and access.

FOR EVERY COMMITTEE MEMBER

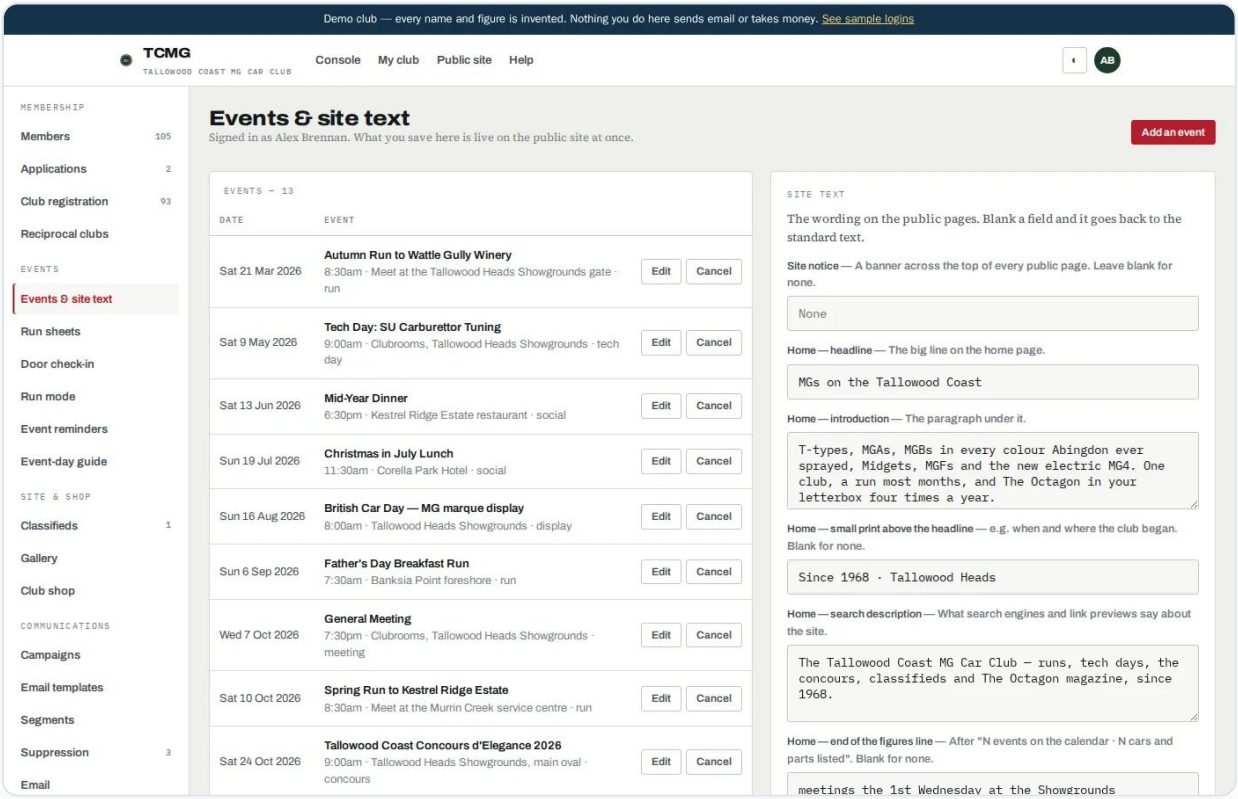
Events and event day

Adding events, tickets and capacity, RSVPs and the waitlist, reminders, run sheets, door check-in and run mode.

Any committee member can run events: add them to the calendar, watch the numbers, print the run sheet, and on the day tick people in at the door and follow the cars on a run. Everything is under **Events** in the console sidebar, and what you save shows on the public calendar straight away.

Adding and changing events

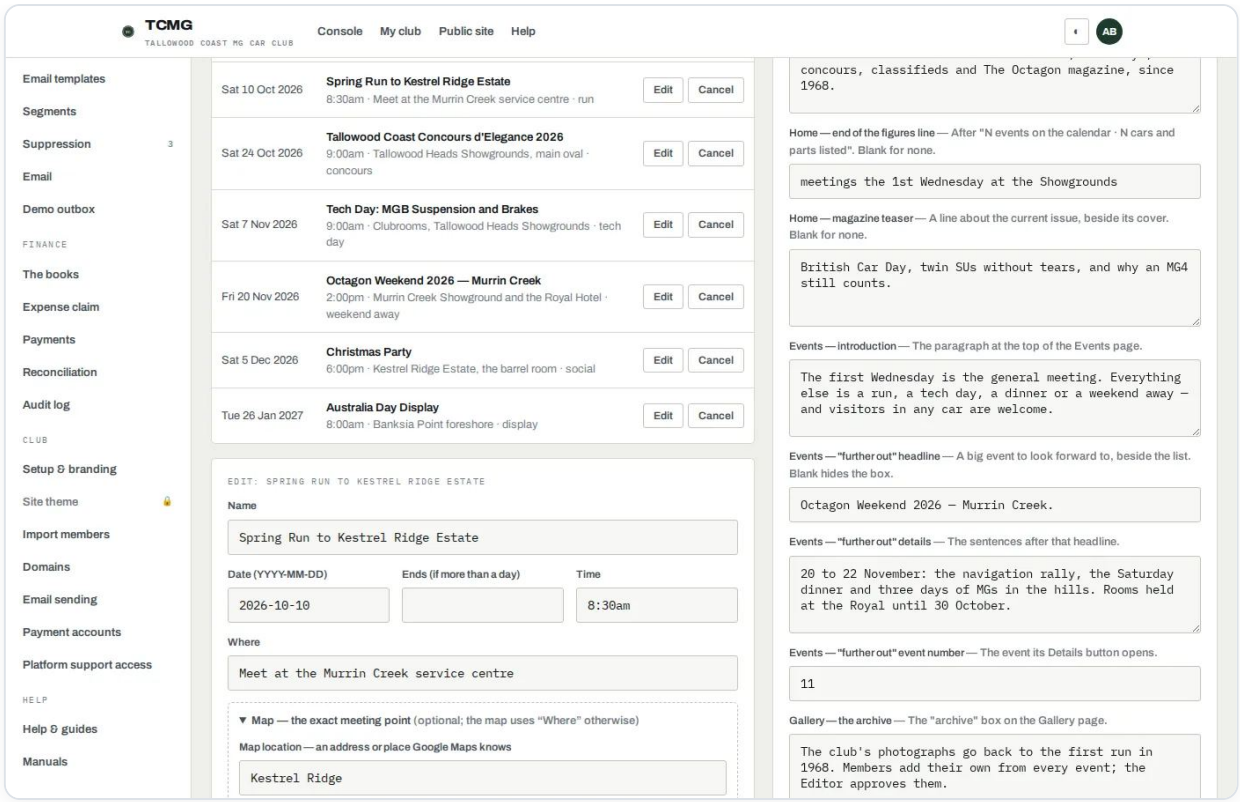
Events → Events & site text lists every event, oldest first, with **Edit** and **Cancel** beside each.



The events list.

To add an event

1. Press **Add an event** (or **Edit** beside an existing one).
2. Fill in the **Name**, **Date**, **Ends** (for a weekend away), **Time** and **Where**. Choose the **Type** — meeting, working bee, lunch, social, weekend away, national or run.
3. Set **From $** (leave it blank for a free event) and **Capacity** (blank for no limit).
4. Write a **Description** for the event page.
5. Press **Save event**. It is on the public calendar at once.



Editing an event.

Tickets and prices

For a paid event, list its ticket types in **Tickets**, one per line, as *code* | *name* | *price* — for example `LUNCH | Winery lunch | 45`. Members choose tickets when they RSVP and pay by card, direct deposit or at the event. Takings show on the run sheet and in the Treasurer's books.

Repeating events

Repeats makes a monthly pattern, such as "Every first Wednesday of the month" for general meetings. Each repeat appears on the calendar and gets its own run sheet and reminders.

The map

The event page shows a map of **Where**. If the meeting point is somewhere more exact — a gate, a car park — open **Map** and give a place name Google Maps knows, or the latitude and longitude. To get exact coordinates, press and hold (or right-click) the spot in Google Maps and copy the two numbers.

Documents: run notes, routes and menus

The **Documents** panel under the event form takes PDFs — run notes, route sheets, menus — up to 12 per event and 10 MB each.

1. Choose the PDF and give it a title (blank uses the file name).
2. Choose **Who can open it**: **Anyone** (shows on the public event page) or **Members only** (needs a signed-in member).

3. Press **Upload**. Documents show on the event page, the run sheet and in the 48-hour reminder.

Cancelling

Cancel keeps the event on the calendar, marked cancelled, and stops its reminders. **Reinstate** undoes it. To take an event off the calendar altogether, edit it instead.

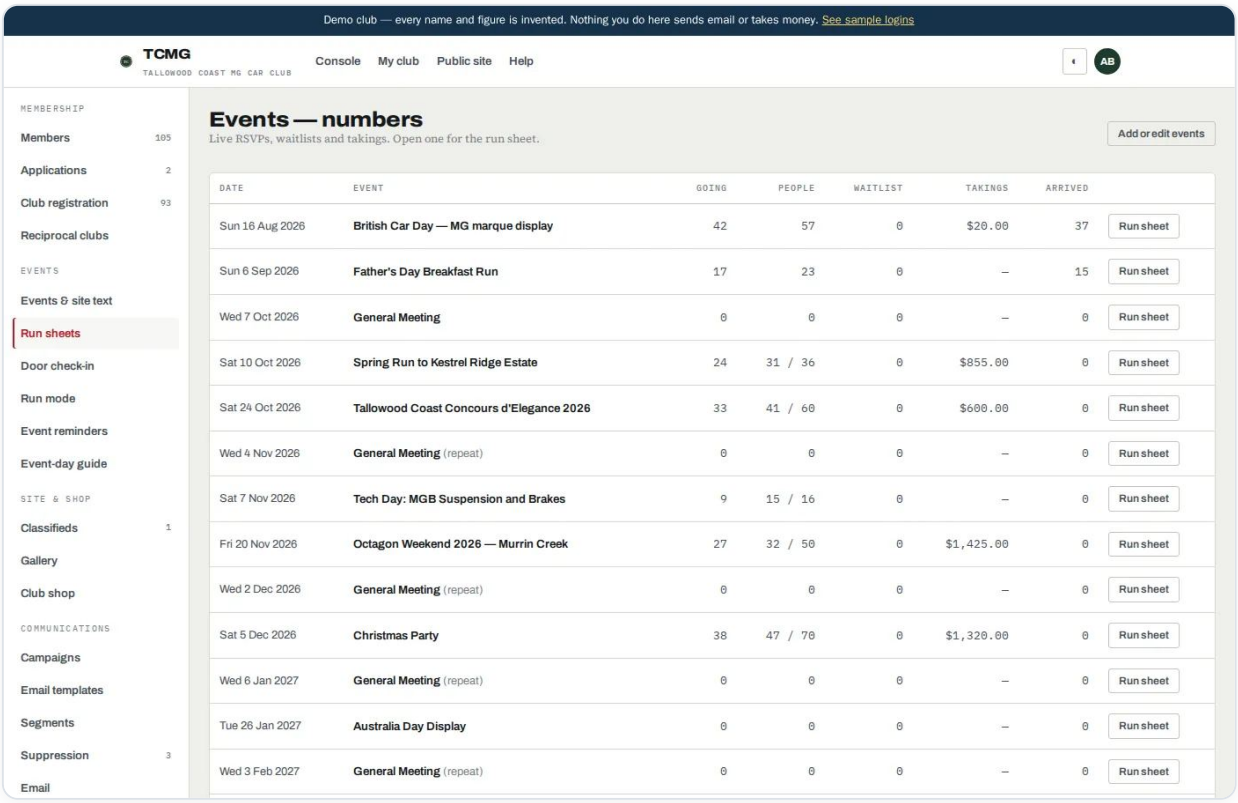
Site text

The same page holds the **Site text**: the headline and paragraphs on the public pages, the About page, the footer's meeting line and the **Site notice** banner across every public page. Blank a box to go back to the standard wording.

RSVPs, capacity and the waitlist

Members RSVP on the event page: how many are coming, which car they're bringing, dietary needs and tickets. When an event reaches its capacity, new RSVPs go on the **waitlist**. When someone who is going says they can't make it, their place goes to the next person on the waitlist, who is told straight away.

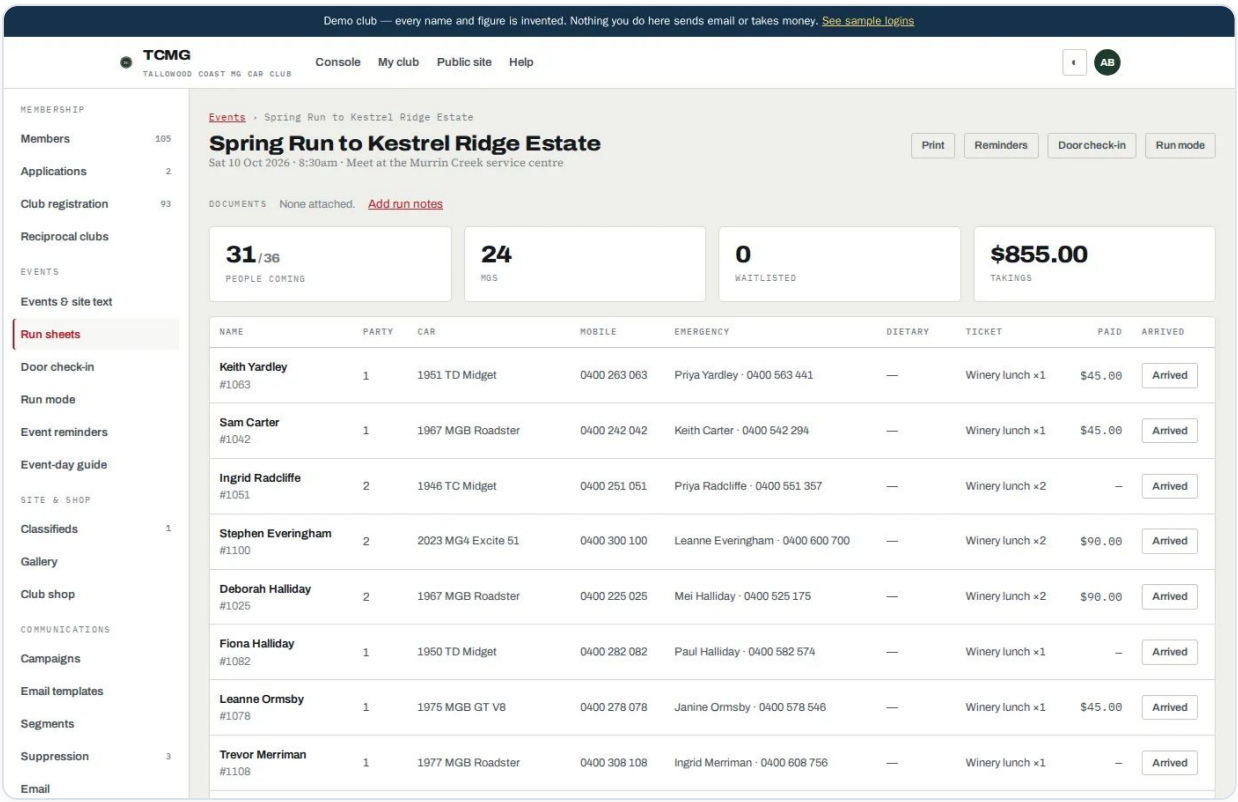
Events → Run sheets shows the live numbers for every event: RSVPs going, people (against capacity), the waitlist, takings and how many arrived.



The numbers for every event.

Run sheets

Press **Run sheet** beside an event for everything the organiser needs: each party's size, car, mobile, emergency contact, dietary needs, tickets, what they paid, and whether they've arrived. The waitlist follows.



A run sheet.

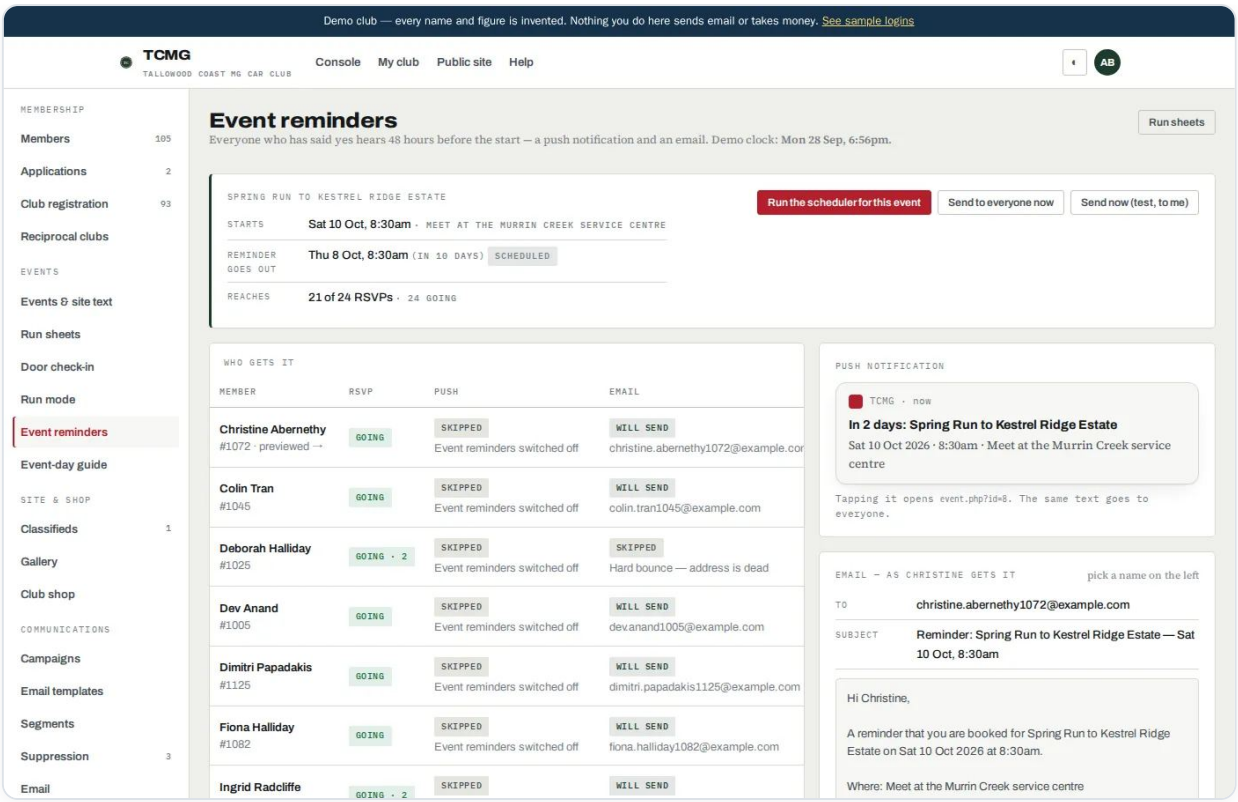
- **Print** gives a paper copy for the clipboard.
- **Reminders**, **Door check-in** and **Run mode** go straight to those screens for this event.
- **Add run notes** attaches documents, as above.
- After the event, **Send follow-up** sends a thank-you to those who came.

> A run sheet holds mobiles and emergency contacts. Keep printed copies with the organiser, and shred them afterwards.

Event reminders

Everyone who has said they are going gets a reminder 48 hours before the start: a push notification on their phone (if they have turned reminders on) and an email. People on the waitlist or who said no don’t. A cancelled event sends none.

Events → Event reminders shows, for each event, when its reminder goes, who it reaches on which channel (and why not, if not), exactly what the notification and email say, and what has already gone out.



An event's reminder, before it goes.

- **Run the scheduler for this event** sends only if it's due. The scheduler also runs by itself every hour.
- **Send to everyone now** sends it straight away to everyone still owed one.
- **Send now (test, to me)** sends it to you only, to check how it looks.

Nobody gets the same reminder twice. The email skips addresses that have hard-bounced or are suppressed; an unsubscribe from newsletters doesn't stop it, because the member asked for the booking.

Event day

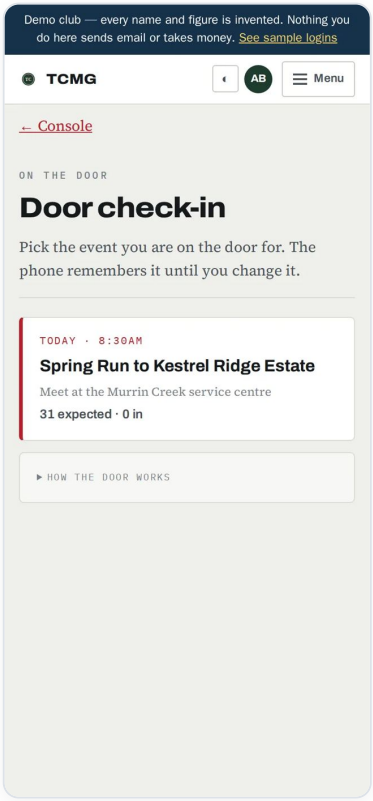
Two things any committee member can do from a phone on the day: tick people in at the door, and see where every car is on a club run. Read this before the day, not at the door.

Before the day

- Sign in on your phone once, at home, from the club site's **Member login**. Staying signed in means no fiddling at the door.
- Add the site to your home screen (Share → Add to Home Screen on an iPhone; ⋮ → Install app on Android). It then opens like an app.
- Open **Door check-in** and pick the event while you still have signal. The phone then keeps a copy, so the door opens even with no signal at all.
- Charge the phone: the door is an hour of screen-on.

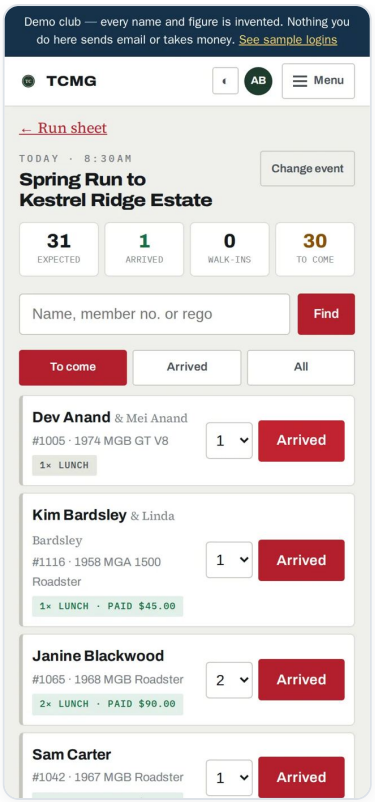
At the door

Open **Events** → **Door check-in** (or **Door check-in** on the run sheet). It is made for a phone held in one hand.



Pick the event. Today's comes first.

1. **Pick the event.** The phone remembers it until you press **Change event**.
2. **Find the person.** Everyone going is listed, with their car, party size and tickets. Start typing a name, member number or rego and the list narrows.
3. **Set how many came**, then tap **Arrived**. If a party of three turns up as two, change the number first. Tapped the wrong one? Tap **Undo**.
4. Watch the numbers across the top: expected, arrived, walk-ins and still to come — people, not parties.



Tap **Arrived**; the numbers update.

Rows marked **not financial** belong to members whose membership has lapsed — welcome them in, and mention renewing.

Walk-ins and guests

- **A member who didn't RSVP**: type their name, number or rego and press **Find**. They are checked in as a walk-in. People on the waitlist or who said no are checked in the same way. Find searches a copy of the member list kept on the phone, so it works with no signal too.
- **Someone who isn't a member**: open **Add a guest** — their name, a mobile if they'll give it, how many, and which member brought them. It goes on the run sheet.
- A **printed membership card** carries a check-in code: scan it with the phone's camera and it opens the right person.

Two phones on one door, and no signal

Two or three people can work the door at once; each phone refreshes every 20 seconds. If the signal drops, keep going. Ticks are saved on the phone, even if you close the page or it goes flat. Each one not yet sent has a dashed edge and says **Not synced yet**, and a bar at the top says how many are waiting. They send by themselves when the signal returns, or tap **Try now**. Ticking the same person twice does no harm.

Afterwards, the run sheet shows a tick against everyone who arrived, walk-ins marked, and guests with their mobile. The follow-up goes to those who came.

On the run: run mode

Run mode shows every car on a map during a club run — who's moving, who's stopped, who needs help. Any committee member can start it, watch it and end it.

> A phone only shares its location while the run-mode page is open and on screen. If it locks, or the member switches app, their car shows as *not seen* until they come back. That is how phones treat websites. So the ask to members is simple: phone in the mount, page open, charger plugged in.

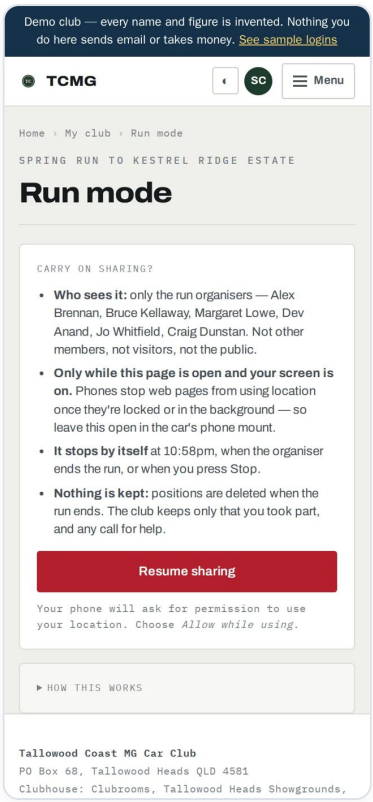
Starting run mode

1. At the briefing, tell people run mode is on and what it's for: so nobody gets left at a turn-off, and help reaches anyone who breaks down. It is entirely optional.
2. Open **Events** → **Run mode**, press **Set up** beside the event, then **Start run mode**.
3. Choose when it switches itself off — 2 to 12 hours. **+2 hours** extends it if the day runs long.
4. If you're in the lead or tail car, **Share my own location** puts you on the map too.

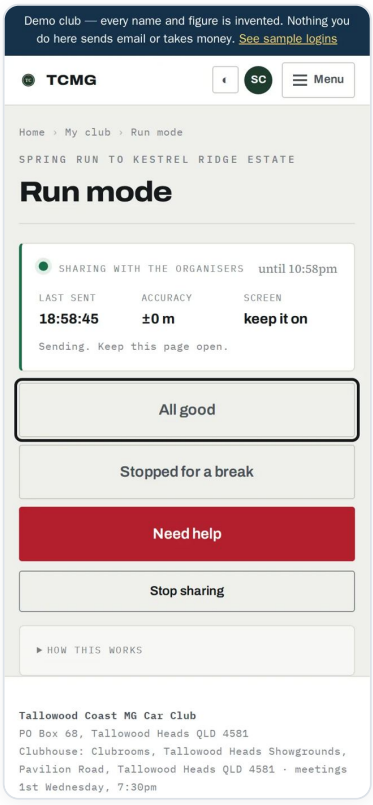
What members do

Members going to the event now see a green **Run mode** button on My club and on the event page.

1. The button opens a short screen saying exactly who sees their location (the committee), that it only works with the page open, when it stops, and that nothing is kept.
2. They press **Yes — start sharing my location** (or **Resume sharing**) and allow location when the phone asks. *Allow while using* is enough.
3. The page keeps the screen on and sends their position every half-minute or so. A green strip at the bottom shows they're sharing and until when; **Stop** ends it at once. Two buttons say how they are: **All good** and **Stopped for a break**.
4. The red **SOS** button is always there while the run is live. It sends only when **held for 2 seconds**, so a pocket-press can't set it off. It works even if they never started sharing: holding it sends their position that once (the screen says so). Beside it are **Call 000** and **Call** the run leader.



The member agrees first.

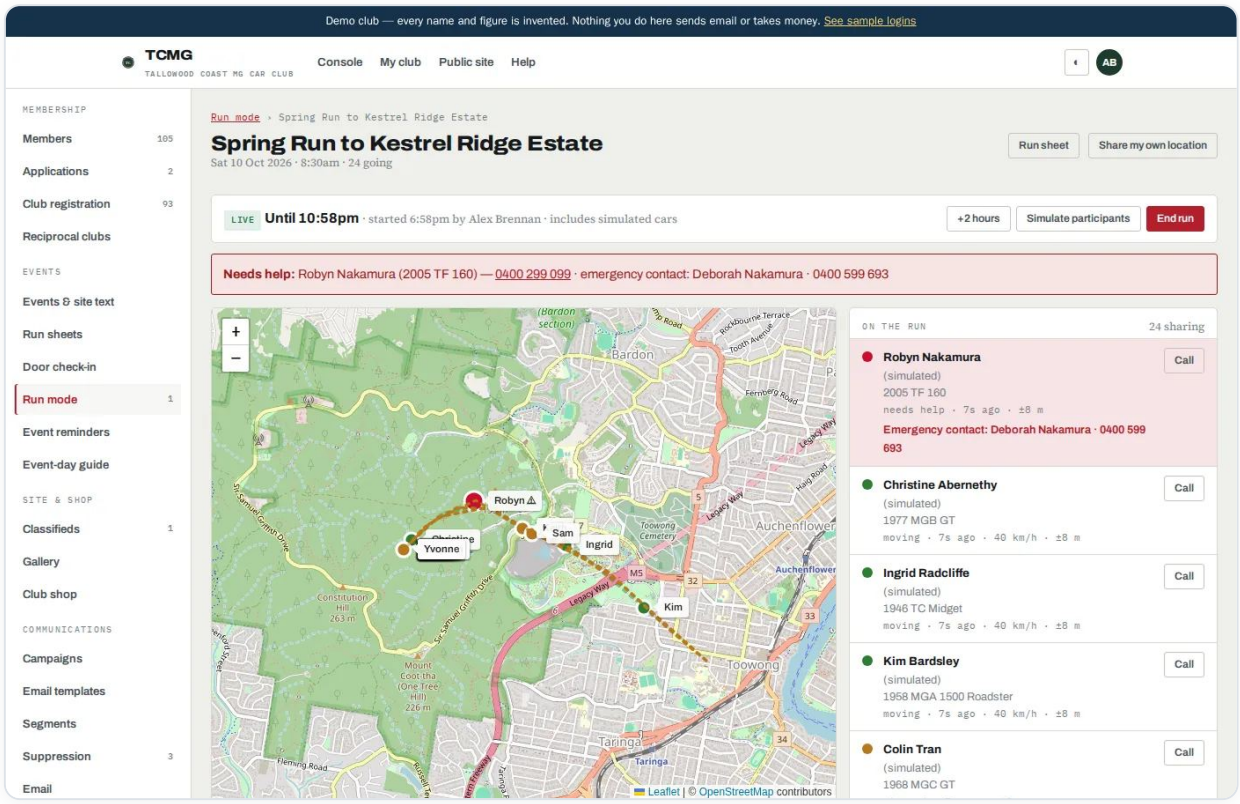


Sharing — and three buttons.

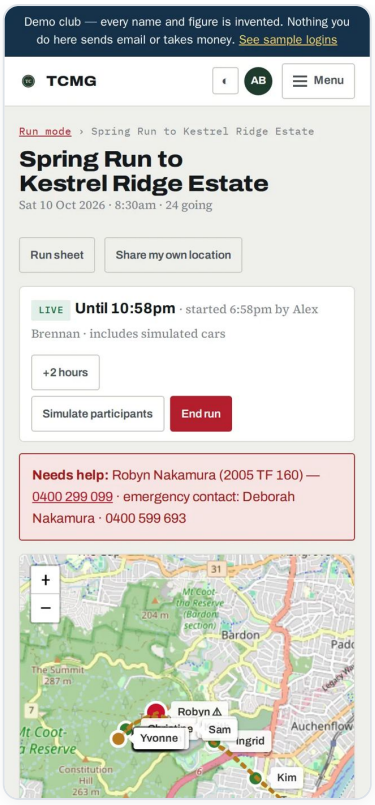
Reading the map

The map refreshes by itself. Each car is a dot labelled with the driver’s first name, with a dashed trail of the last half hour. The list beside it has the car, speed, how long since they last reported, and a **Call** button.

Dot	Means
Green	Moving.
Amber	Stopped, or said “stopped for a break”.
Red, pulsing	Sent an **SOS**. They are pinned at the top in a red panel.
Grey	Not seen for a few minutes: phone locked, page closed or no signal. Usually nothing’s wrong — but it’s the car to ring if they don’t reappear.



Run mode on a computer (the demo club, with simulated cars).



On a phone the map comes first and the list below.

When someone sends an SOS

Every committee member with notifications on gets an urgent push with the member's name, car, mobile and how accurate their position is; tapping it opens the map on them. On the open map, a red panel pins every SOS at the top with the time, their mobile, their emergency contact (shown only for an SOS, only here) and the position — or *position unknown* if their phone couldn't get one. Turn on **alert sound** on the map to hear a new SOS.

1. Press **Acknowledge** — the member's screen then says you've seen it, so they know help is coming.
2. Ring them — tap **Call**. Most SOS calls are a flat battery or a wrong turn.
3. **Show on map** takes you to them. Send the nearest car or the tail car.
4. If it's an emergency, call 000 first, then the club.

If the member is fine they press **Cancel SOS — I'm OK**; the committee is told. Pressing SOS again only updates their position — it doesn't send the alert twice.

Ending the run, and privacy

Press **End run** when the last car is in, or let it switch itself off at the time you chose. The moment it ends, every position and trail is deleted. The club keeps only who took part, the start and end times, and any help calls. Only the committee ever sees locations — never other members or the public.

Quick answers

If…	Then…
Someone isn’t on the door list	They didn’t RSVP. Type their name and press **Find** — they go in as a walk-in. Not a member? **Add a guest**.
“Not synced yet” won’t go away	Read the bar at the top. No signal: they send when it’s back. Signed out: sign in again on this phone. The waiting ticks are kept on the phone throughout.
Door check-in shows no event	It lists events from yesterday to a week ahead. Check the event’s date.
A member can’t see the green Run mode button	Run mode isn’t started, or they haven’t said they’re going. RSVP them on the event page (or check them in at the door) and it appears.
A member’s phone says location is blocked	They said no to the location question. iPhone: Settings → Privacy & Security → Location Services → Safari Websites → While Using. Android: tap the padlock beside the address → Permissions → Location → Allow.
A car keeps going grey	Their phone is locking. Ask them to keep the page open in the mount with a charger; some phones override the screen staying on in battery-saver mode.
A member didn’t get their reminder	Open **Event reminders** for the event: the table says for each person whether push and email went, and why not.

FOR THE MODERATOR ROLE

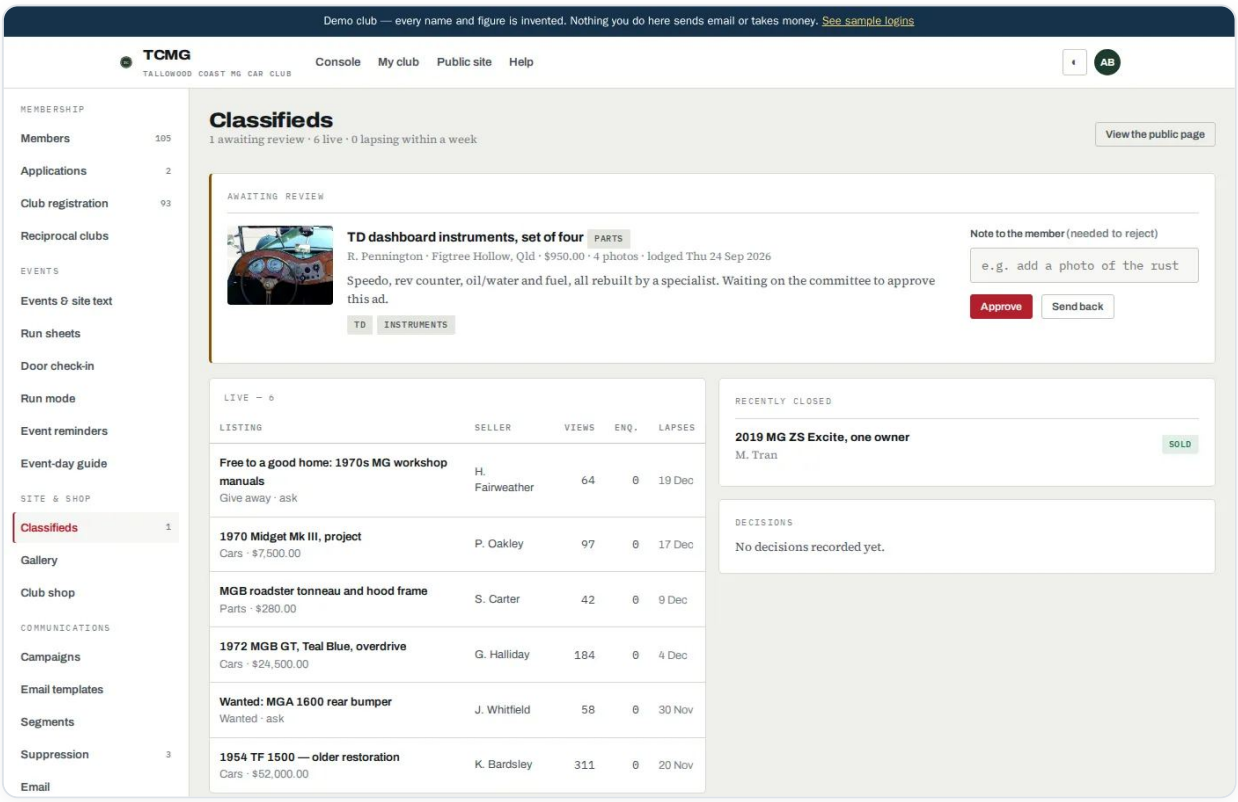
Moderating classifieds and the gallery

The classifieds queue, the gallery, albums, photo credits and take-downs.

The Moderator role looks after what members put on the public site: classified ads and photographs. Members' ads and uploads wait for you before anyone else sees them. Both screens are under **Site & shop** in the console sidebar; the number beside each says how many are waiting.

Classifieds

Members lodge ads for cars, parts, wanted items and give-aways from their My club page. **Site & shop → Classifieds** shows those awaiting review first, then the live ads, those lapsing soon, recently closed ads and your decisions.



An ad awaiting review, and the live list below.

To review an ad

1. Read the ad: the title, category, seller, price, photos and description.
2. If it's fine, press **Approve**. It goes live for 90 days, and the seller is told.
3. If something needs changing — a missing price, an unsuitable photo, an ad that isn't club business — type a **Note to the member** and press **Send back**. The note goes to the seller, who can fix the ad and lodge it again. A note is required to send an ad back.

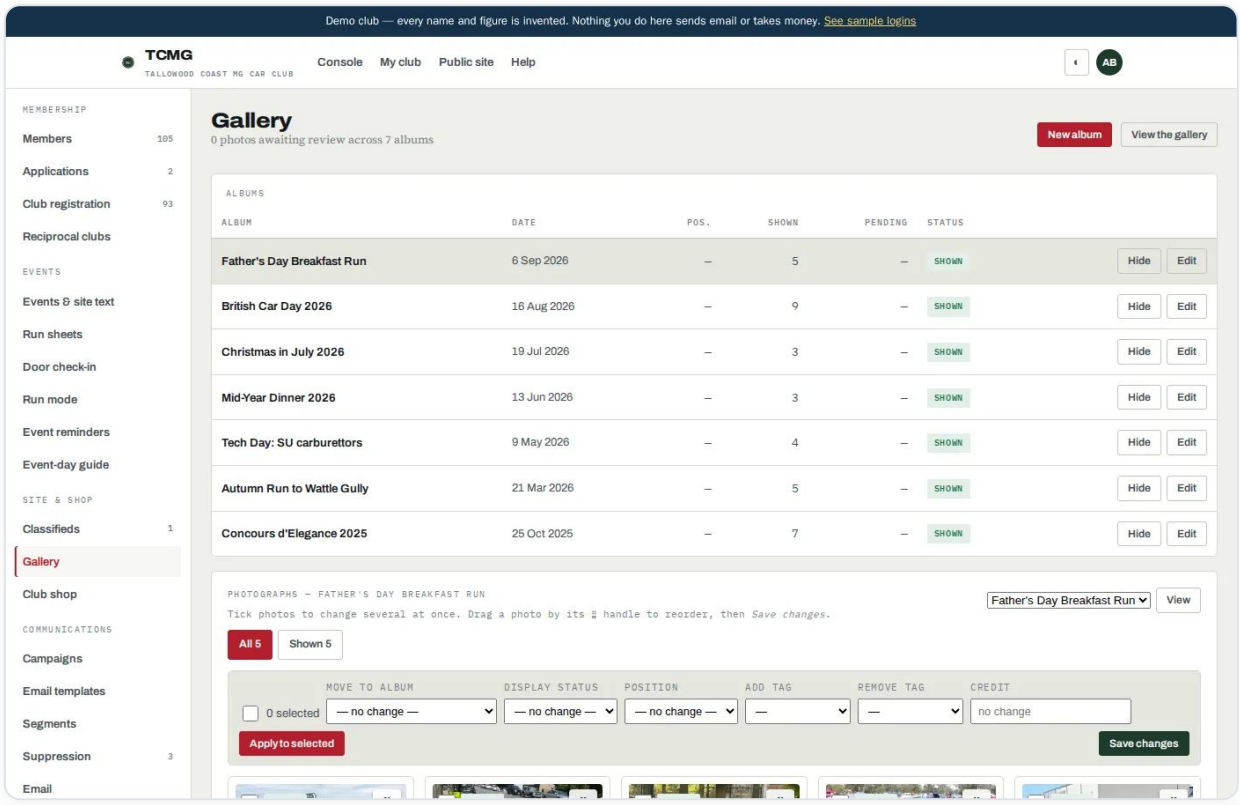
> Decide what the club accepts before the first ad arrives — for example, cars and parts related to the club's interest, no trade dealers — and apply it the same way each time. The **Decisions** log at the bottom records every approval and send-back with your name.

Live ads

The live list shows each ad's views, enquiries and when it lapses. Buyers contact sellers through the site, so members' email addresses are never shown. Near the end of 90 days the seller can renew their ad for another 90 days from My club, or mark it sold or withdrawn. Ads lapsing within a week are counted at the top of the page.

The gallery

Site & shop → Gallery holds the club's photo albums — usually one for each event. Members upload photos from their phones; those wait under **Awaiting review** at the top until you approve them. Photos you upload yourself appear straight away.



Albums, then the photos in one album.

Reviewing members' uploads

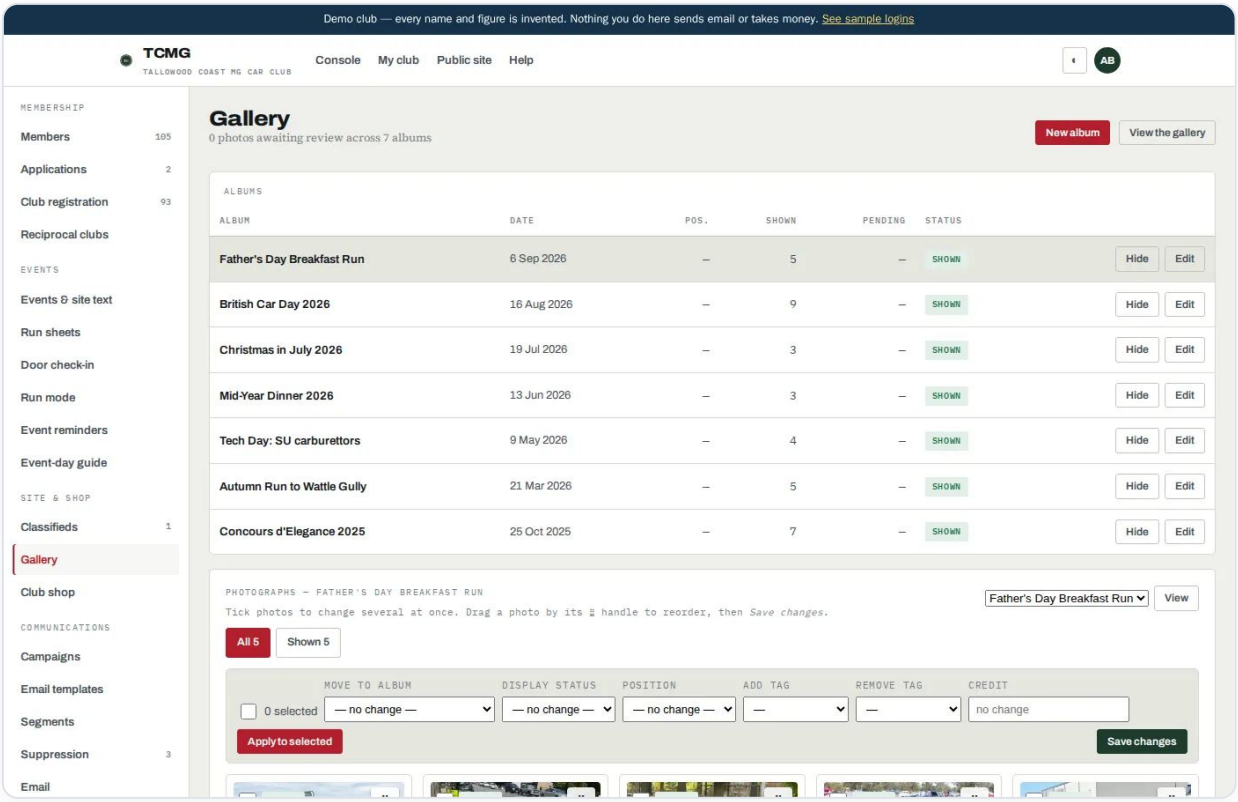
1. Under **Awaiting review**, look through the new photos.
2. Tick the ones to keep and press **Approve selected**; tick any that shouldn't go up and press **Reject selected**.

Location data (where a phone photo was taken) is removed from every photo on the way in, so approving a photo never reveals a member's home.

Albums

- **New album** makes one: its title, date and a description shown under the title.
- **Edit** changes an album's title, date, description, **Cover photograph** and **Position on the gallery page** (1 is first; blank sorts by date).
- **Hide** takes an album off the gallery page and closes it to members; you can still open and edit it. **Show** puts it back.
- **Delete album** (on the edit form) removes an album you made, once it is empty.

Changing several photos at once



Tick photos, choose the change, press **Apply to selected**.

1. Pick the album in the drop-down beside **Photographs** and press **View**.
2. Tick the photos (click a photo to tick it; Shift-click ticks a run).
3. In the grey bar choose what to change: **Move to album**, **Display status** (Shown, Hidden, Awaiting review, Rejected, Removed), **Position** (move to front or end), **Add tag** or **Remove tag**, or the photographer **Credit**.
4. Press **Apply to selected**.

Order, captions and credits

To change the order, drag a photo by its ⠿ handle to where it should go, then press **Save changes**. On a keyboard, focus the handle and use the arrow keys. A photo's status and album can also be changed on its own card — press **Save changes** after. Give photos a photographer credit: members appreciate it, and it

records where the club's pictures came from.

Uploading photos yourself

1. Open the album, then use **Add photographs to…** at the bottom of the page.
2. Choose up to 20 at once, and add a credit and tags if you like.
3. Press **Upload**. A progress bar shows how far through it is and roughly how long is left. Your uploads appear straight away.

Taking a photo down

When someone asks for a photo to come down — it shows them, their car's plate, or their children — act the same day:

1. Find the photo in its album and tick it.
2. Set **Display status** to **Hidden** (off the site, kept) or **Removed** (gone from the site), and press **Apply to selected**.
3. Let the person know it's done.

Both can be undone by setting the status back to **Shown**.

> Photos of children, or of anyone who has asked not to appear, should not go on the public gallery. When in doubt, hide it and ask.

Quick answers

If…	Then…
A member says their ad never appeared	Check **Classifieds**: it may be waiting for review, or it was sent back with a note — the note went to their email.
An ad has sold but is still up	Ask the seller to mark it sold from My club; it then leaves the live list.
A member's photos aren't on the gallery	They are under **Awaiting review** until you approve them.
An album is in the wrong place	**Edit** it and set its position, or blank the position to sort by date.

FOR THE REGALIA ROLE

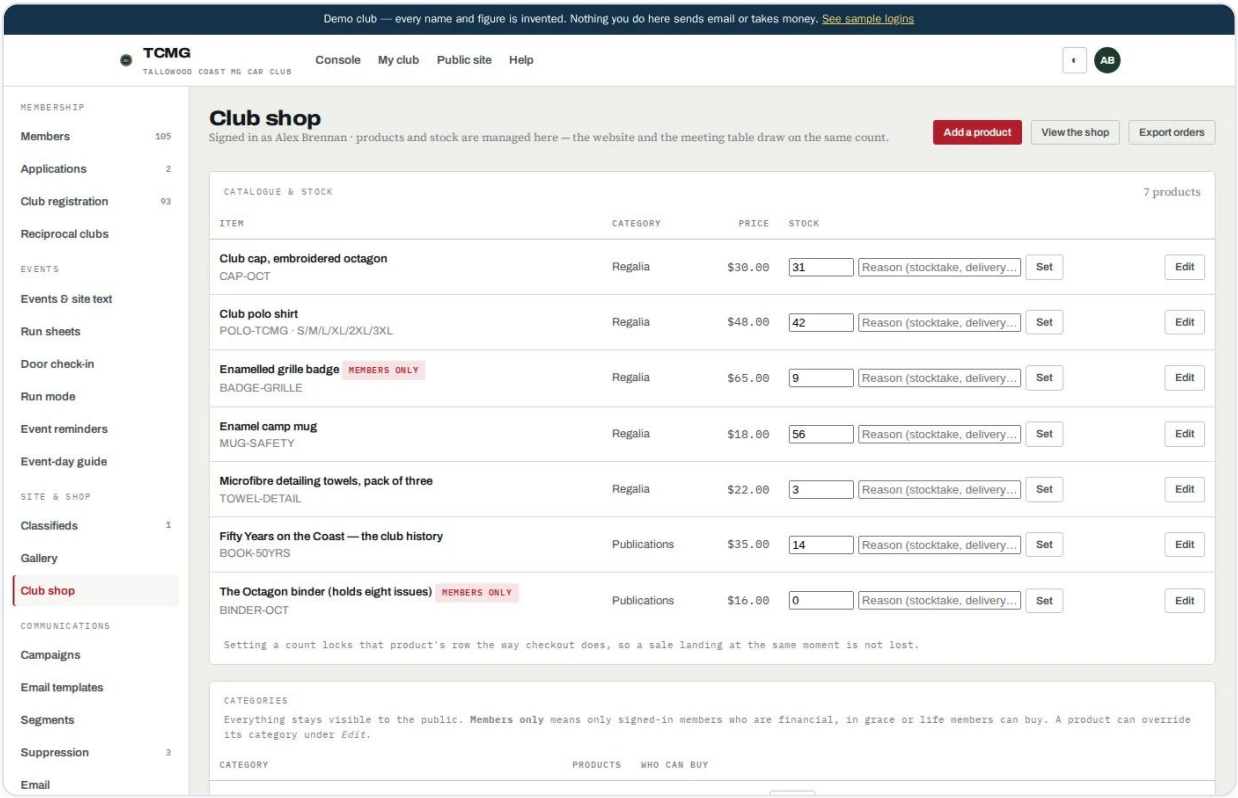
The club shop

Products, stock, categories and who can buy, orders, sales at the meeting table, collection and posting.

The Regalia role runs the club shop: caps, shirts, badges, books — whatever your club sells. The website shop and the table at meetings share one catalogue and **one stock count**, so the last grille badge is never sold twice. Everything is on **Site & shop → Club shop**.

The catalogue and stock

The top of the page lists every product with its code, category, price and stock.



The catalogue. Type a new count and a reason, then **Set**.

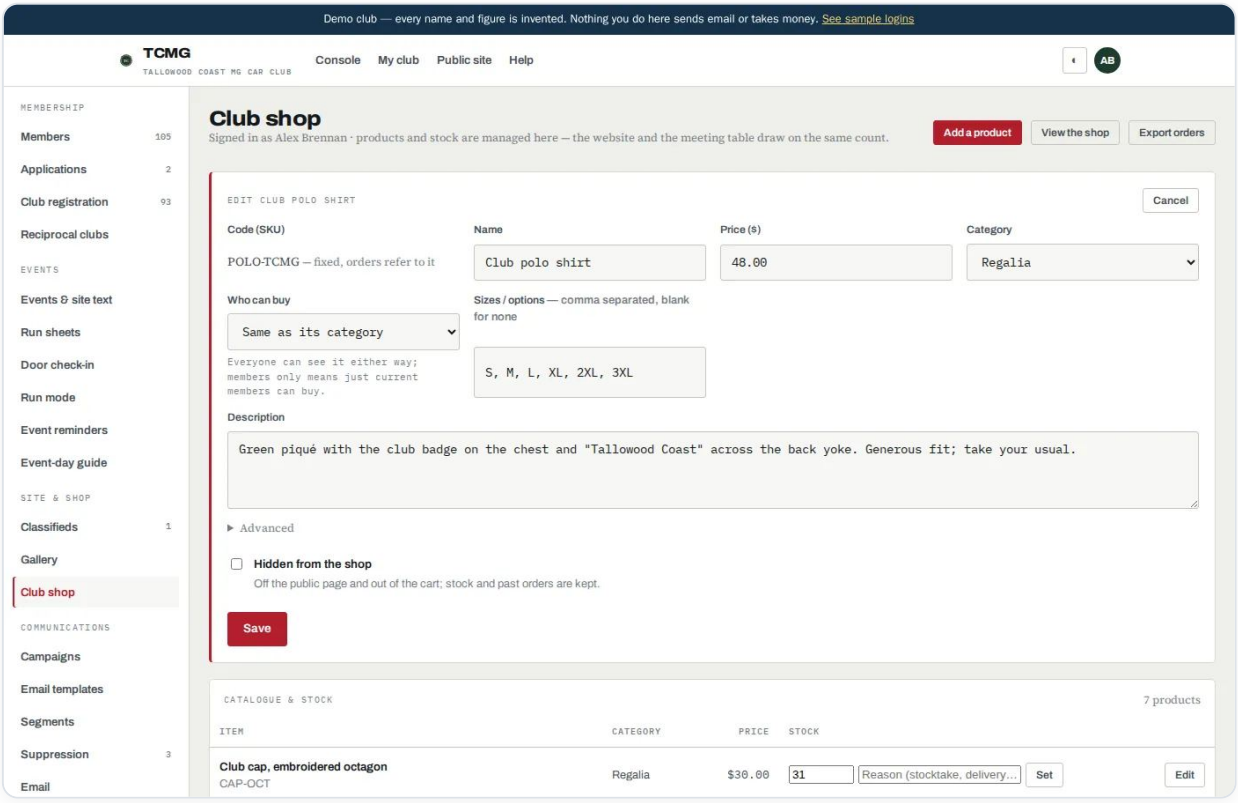
To change a stock count

1. Type the new count in the product's stock box — the number you actually have on the shelf.
2. Give a **Reason**: "stocktake", "delivery of 24", "two damaged".
3. Press **Set**. The change and its reason go in the **Catalogue changes** log.

> Setting a count is safe even while someone is buying online: a sale landing at the same moment is not lost.

Needs attention, further down, lists products running low or out of stock.

Adding and changing products



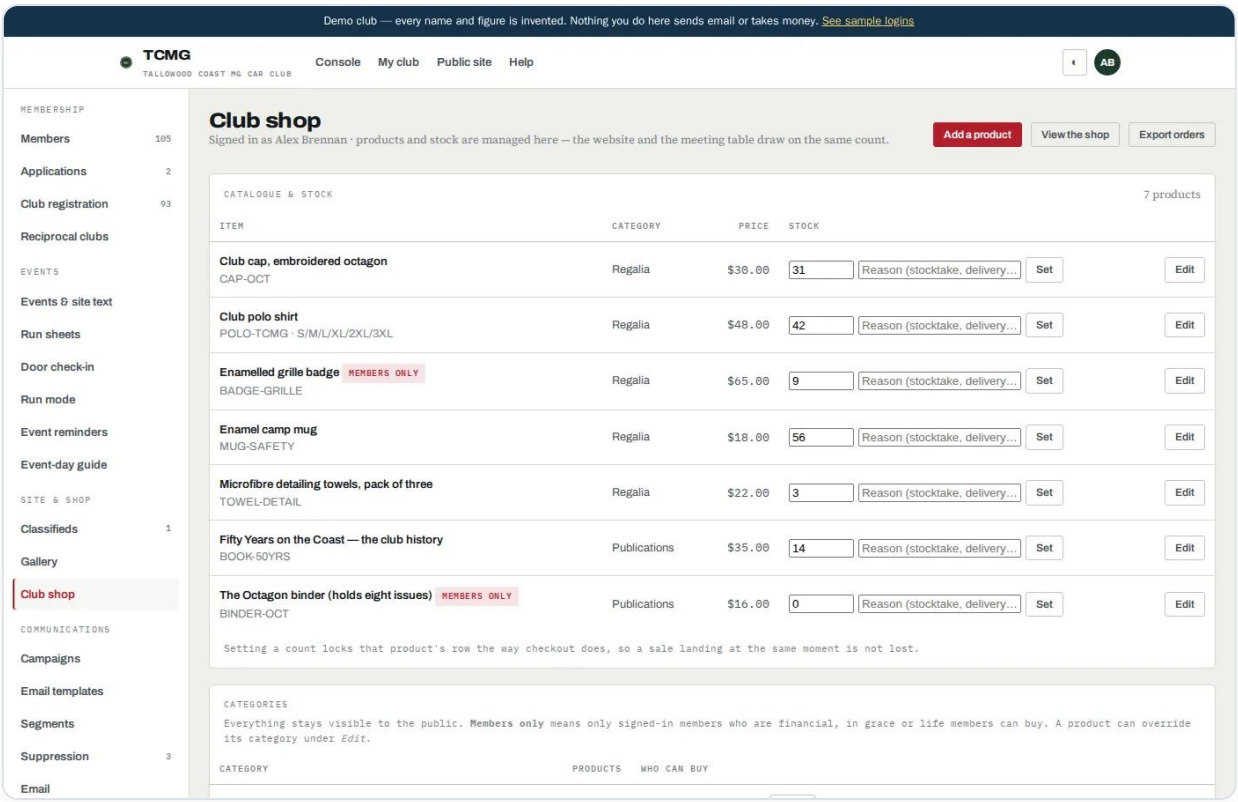
Editing a product.

1. Press **Add a product** (or **Edit** beside one).
2. Give it a **Code (SKU)** — short, in capitals, e.g. `CAP-NAVY`. It can't be changed later, because orders refer to it.
3. Fill in the **Name**, **Price**, **Category**, **Sizes / options** (comma separated, e.g. `S, M, L, XL`; blank for none) and a **Description**.
4. Choose **Who can buy**: **Same as its category**, **Anyone** or **Members only**.
5. Press **Add product** (or **Save**), then set its stock in the catalogue.

Hidden from the shop takes a product off the public page and out of the cart while keeping its stock and past orders — for a line you're between batches of, or an old design.

Categories and who can buy

Every product belongs to a category (Regalia, Publications, Spares, Other — or your own). Each category says who can buy from it.



Categories, and who can buy from each.

- **Anyone** — visitors and members alike can buy.
- **Members only** — everyone can see the product, but only signed-in members who are financial, in grace or life members can buy it.

A product can override its category on its own form. Add a category at the bottom of the list; a category with no products can be removed.

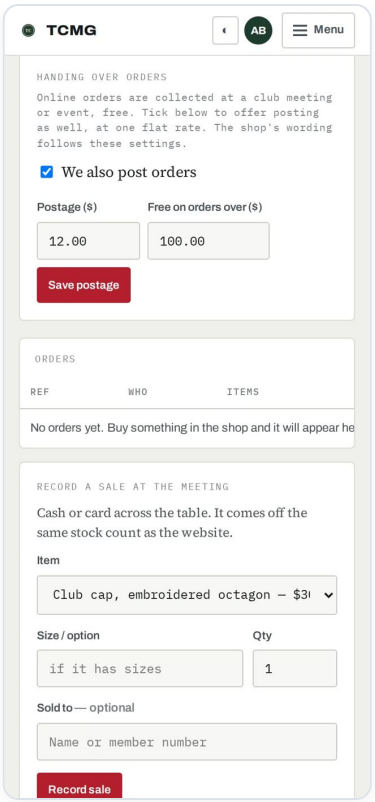
Orders from the website

Members and visitors pay online by card, by direct deposit, or at the next meeting. The **Orders** list shows every order: its reference, who placed it, the items, how it came in, and the total. Stock is set aside the moment an order is placed.

- **Collected or posted.** Online orders are collected at a club meeting or event, free. Under **Handing over orders**, tick **We also post orders** to offer posting at one flat rate, with **Free on orders over** if you like, and press **Save postage**. The shop's wording follows these settings.
- **Not yet paid.** Orders to be paid by direct deposit or at a meeting wait under **Finance → Payments → Awaiting payment**. The Treasurer marks them paid when the money arrives; cancelling one there puts the stock back on the shelf.
- **Export orders** downloads the orders as a spreadsheet — handy for a packing list before a meeting.

Sales at the meeting table

Cash or card across the table comes off the same stock count as the website. Record each sale as it happens — a phone is enough.



Recording a sale on a phone.

1. Scroll to **Record a sale at the meeting**.
2. Choose the **Item** (the list shows how many are left), the **Size / option** if it has one, and the **Qty**.
3. Optionally note who bought it under **Sold to** — a name or member number.
4. Press **Record sale**. Stock drops at once.

> Hand the takings to the Treasurer with a note of the total. They record the money in the books; the sale itself is already counted here.

How shop sales reach the books

- Every **paid** order, online or at the meeting table, posts to **220 Regalia sales** automatically the next time the Treasurer opens The books. GST is included at the account's default rate.
- Card payments through Square land in the Square clearing account; every other payment lands in the club's operating bank account.
- An order still awaiting payment isn't posted until it is marked paid.
- Buying stock is an expense, **310 Regalia stock**. Give the supplier's invoice to the Treasurer, or lodge an **Expense claim** if you paid it yourself.

> Hand the meeting-table cash to the Treasurer with the sale references (from the Orders list or its export), so the bank deposit can be matched. See The books.

Card readers

This page is the catalogue and the stock count. If your club later takes cards at meetings through its card provider's own reader, the provider's catalogue mirrors this one — never the other way round. Each product has an optional catalogue id for that (under **Advanced** on its form). Until then, record meeting sales with **Record sale** as above.

Quick answers

If…	Then…
The website says something is out of stock but there's a box of them	Set the real count with a reason ("stocktake").
A member wants to buy a members-only item but can't	They must be signed in and financial (or in grace, or a life member). Check their status with the Membership role.
Someone ordered to pay at the meeting and didn't come	Ask the Treasurer to cancel the order under Payments → Awaiting payment; the stock goes back.
A product should disappear for a while	Edit it and tick **Hidden from the shop**.

FOR THE COMMUNICATIONS ROLE

Newsletters and notices

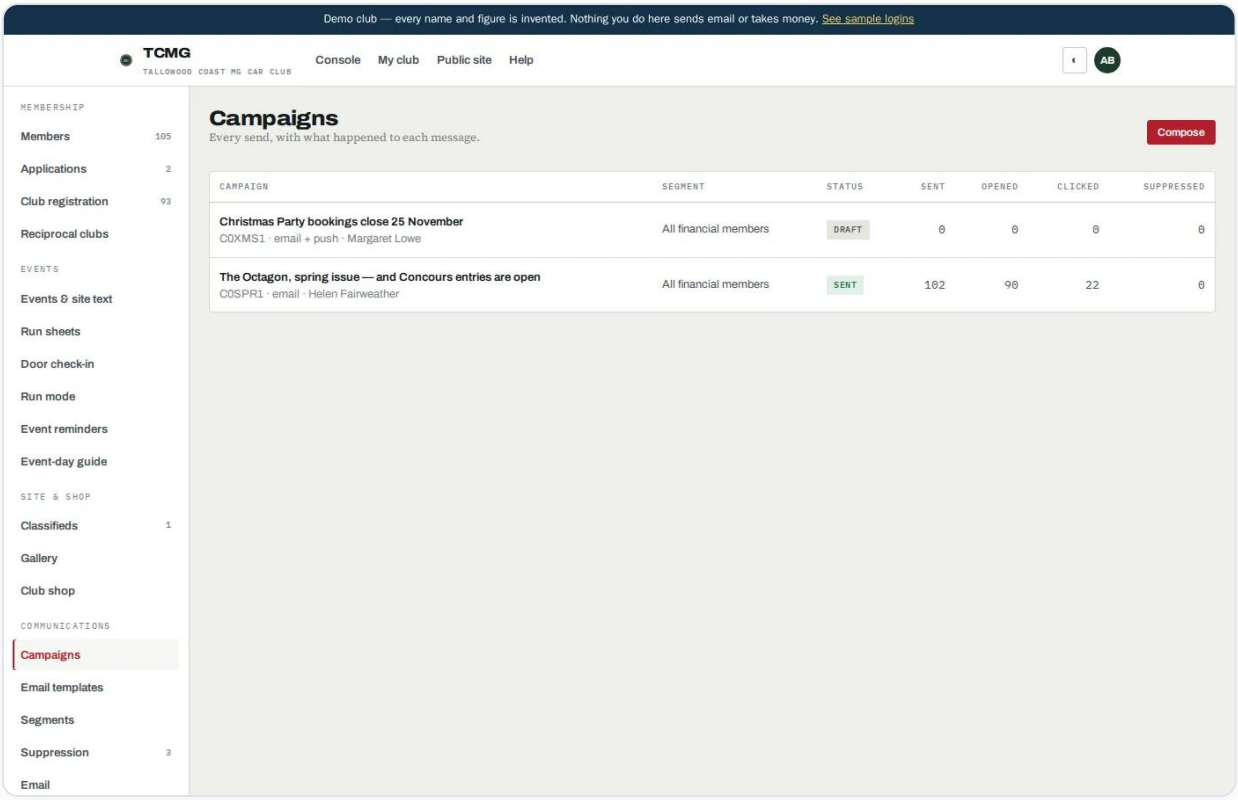
Writing and sending campaigns, segments, scheduling, test sends, results, templates, unsubscribes and bounces.

The Communications role sends the club's newsletters, notices and announcements to members by email and push notification, and looks after who must not be emailed. Everything is under **Communications** in the console sidebar.

> Receipts, renewal notices, sign-in links and event reminders go out by themselves and aren't campaigns. This guide is about the messages you write.

Campaigns

A **campaign** is one message to one group of members. **Communications → Campaigns** lists every campaign — drafts, scheduled and sent — with how many were sent, opened, clicked and suppressed.

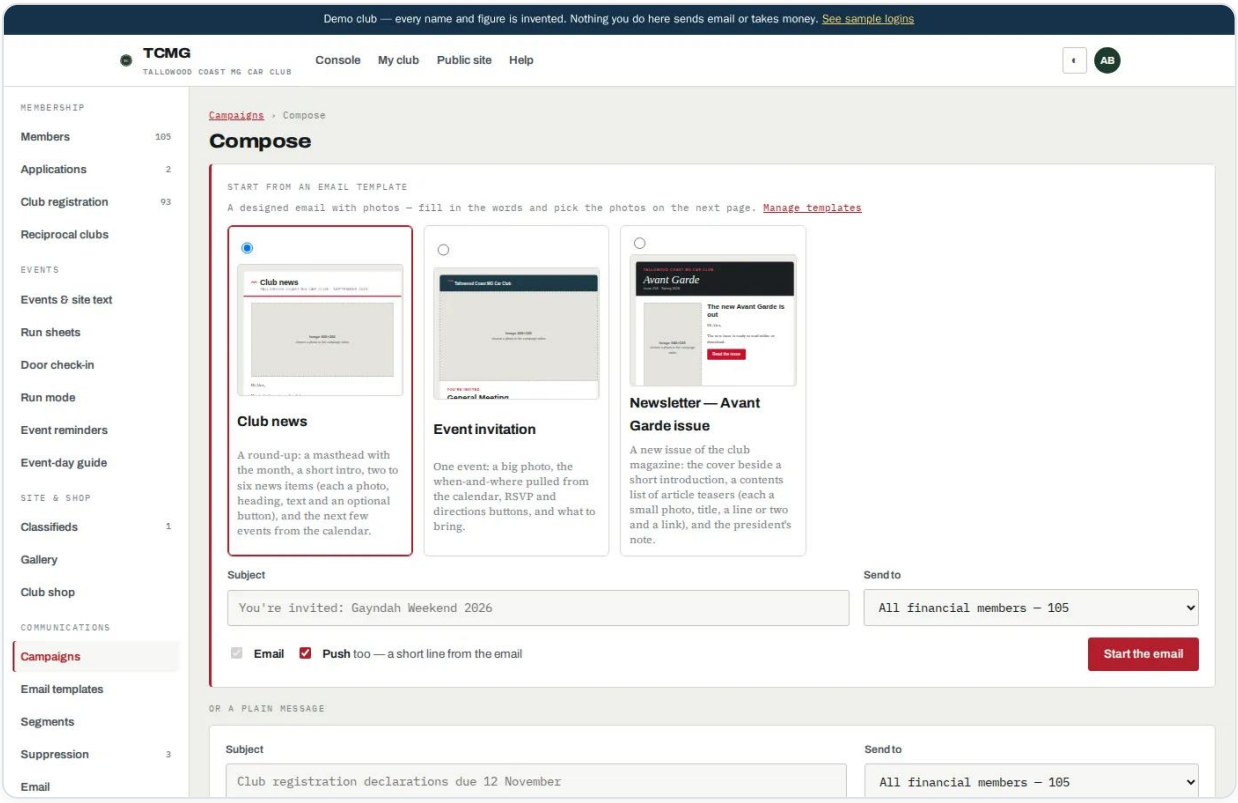


Every campaign, with what happened to it.

There are two kinds:

- A **designed email** made from a template — a newsletter, club news round-up or event invitation, with photos. You fill in the words and pick the photos; no HTML needed.
- A **plain message** — a subject and a few lines of text, for a quick notice.

Writing a designed email



Compose: choose a template or write a plain message.

1. Press **Compose**. Under **Start from an email template**, pick a template, type the **Subject** and choose who it goes to under **Send to**.
2. Tick **Email**, and **Push too** if a short line should also go to members' phones. Press **Start the email**.
3. Fill in the words on the left. Formatted text can use `**bold**`, `*italics*` and links. Merge fields become each member's own details: `{{first_name}}`, `{{last_name}}`, `{{member_no}}`, `{{membership}}` (their category) and `{{renewal_date}}` (their financial-to date). Press **Save**: the preview on the right updates. Switch it between **Desktop** and **Phone**.
4. Choose each photo. Every photo starts as a grey placeholder; pick one from the club's photos or earlier uploads, and describe it for people who can't see images. The campaign can't be sent while any photo is still grey — a red notice names it.
5. Press **Send a test to the test inboxes** and read it in your own email, on your phone too.
6. Back on the campaign, press **Send now**.

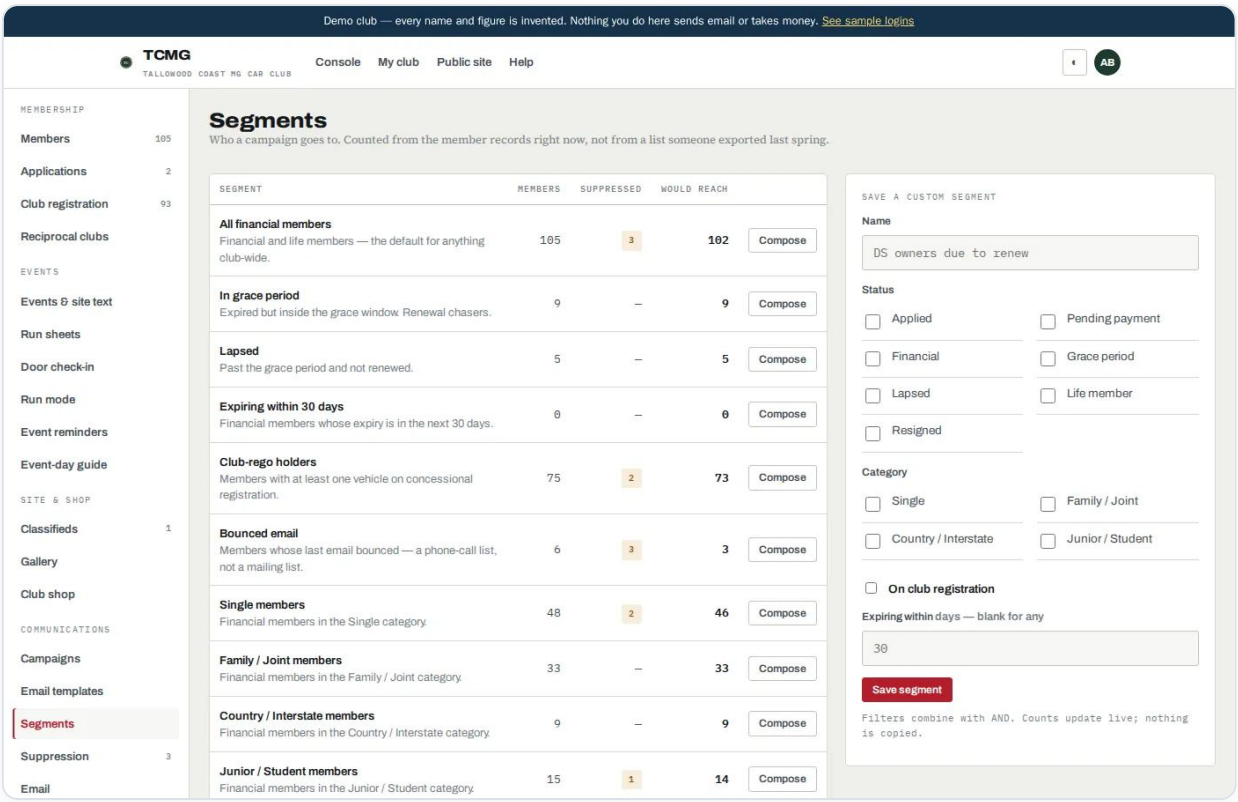
Writing a plain message

1. Under **Or a plain message**, type the **Subject** and the **Message**. The first 140 characters are what a push notification shows.
2. Choose who it goes to, and the channels: **Email**, **Push** or both.
3. Press **Send test to me** to see it first.
4. Choose **Send now** or **Schedule for** a date, and press **Send / schedule**.

> Push notifications are real the moment you send: they buzz members' phones straight away, even when email is in test mode.

Segments: who it goes to

A **segment** is a ready-made "who to send to", counted from the member records at the moment you send — never from an old exported list. **Communications → Segments** shows how many each reaches and how many of them are suppressed.



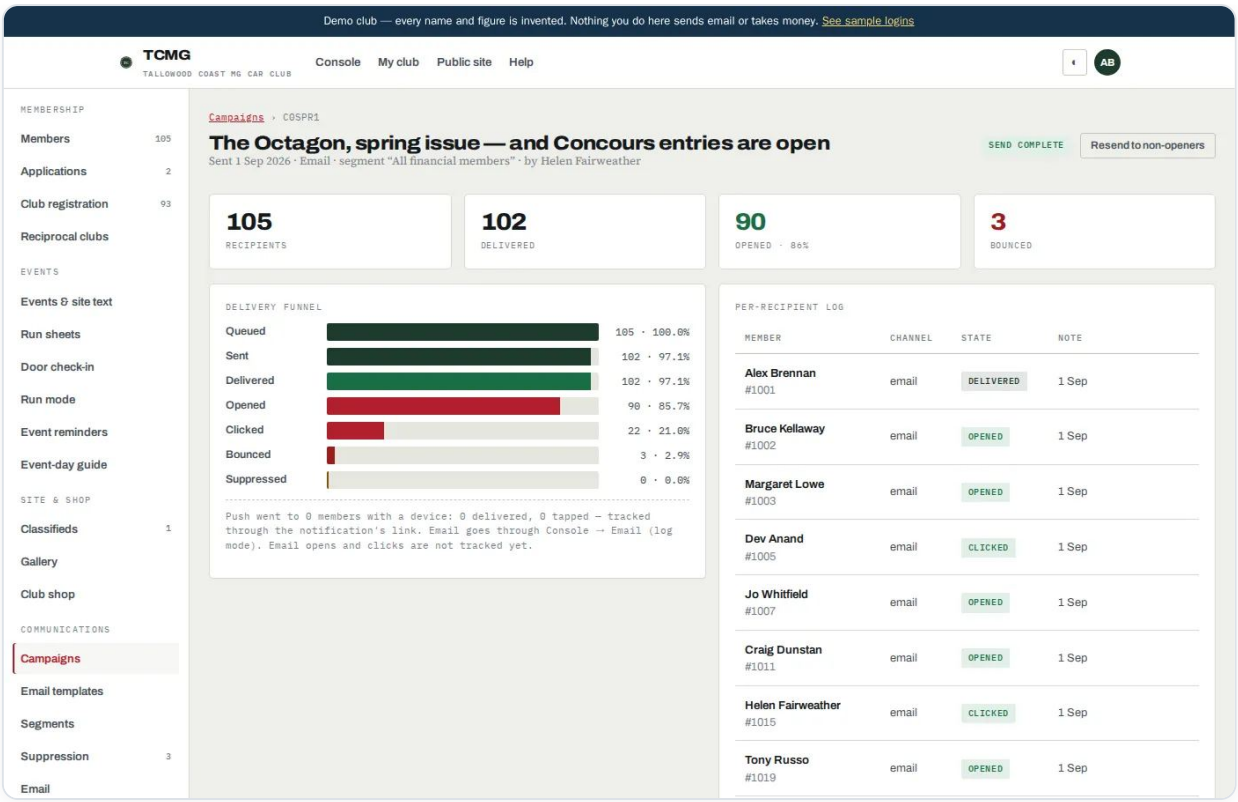
Segments, with how many each would reach.

- **All financial members** — financial and life members; the usual choice for club-wide news.
- **In grace period** and **Lapsed** — for renewal chasers.
- **Expiring within 30 days**, **Club-rego holders**, and one segment per membership category.
- **Going to …** — everyone who has said yes to an event; for last-minute changes.
- **Bounced email** — members whose email bounced. This is a phone-call list, not a mailing list.

Press **Compose** beside a segment to start a campaign to it.

Sending, and the results

Pressing **Send now** puts the emails in a send queue. They go out 50 at a time every 5 minutes, so a big list takes a little while; the campaign shows its progress. Push notifications go immediately. Anyone on the suppression list is skipped automatically.

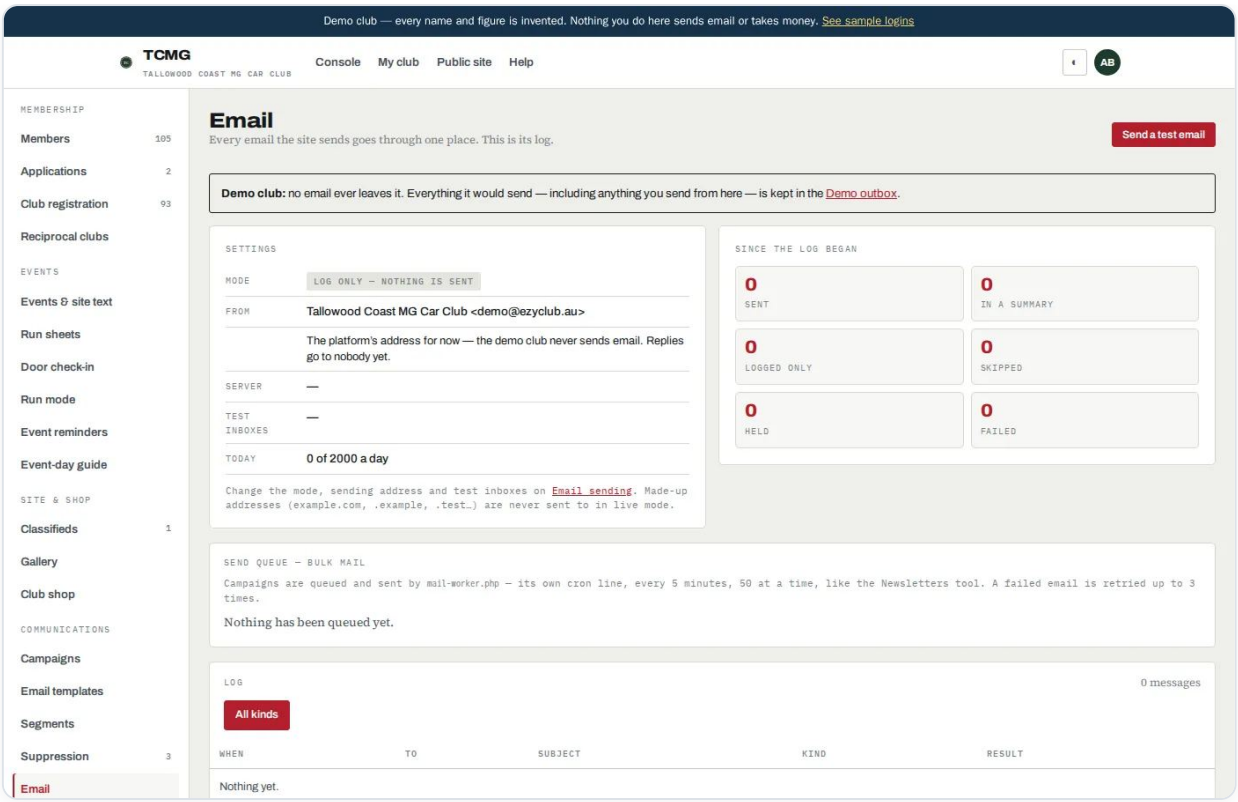


A sent campaign's results.

- The **delivery funnel** shows how many were queued, sent, delivered, opened, clicked, bounced and suppressed.
- The **per-recipient log** shows what happened to each member's copy — useful when someone says "I never got it".
- **Resend to non-openers** makes a follow-up for those who didn't open it.

Test mode and the Email screen

Communications → **Email** shows how the site is sending: the **mode**, the sending address, the day's count against the daily limit, the send queue, and a log of every email the site has sent and what happened to it.



The Email screen.

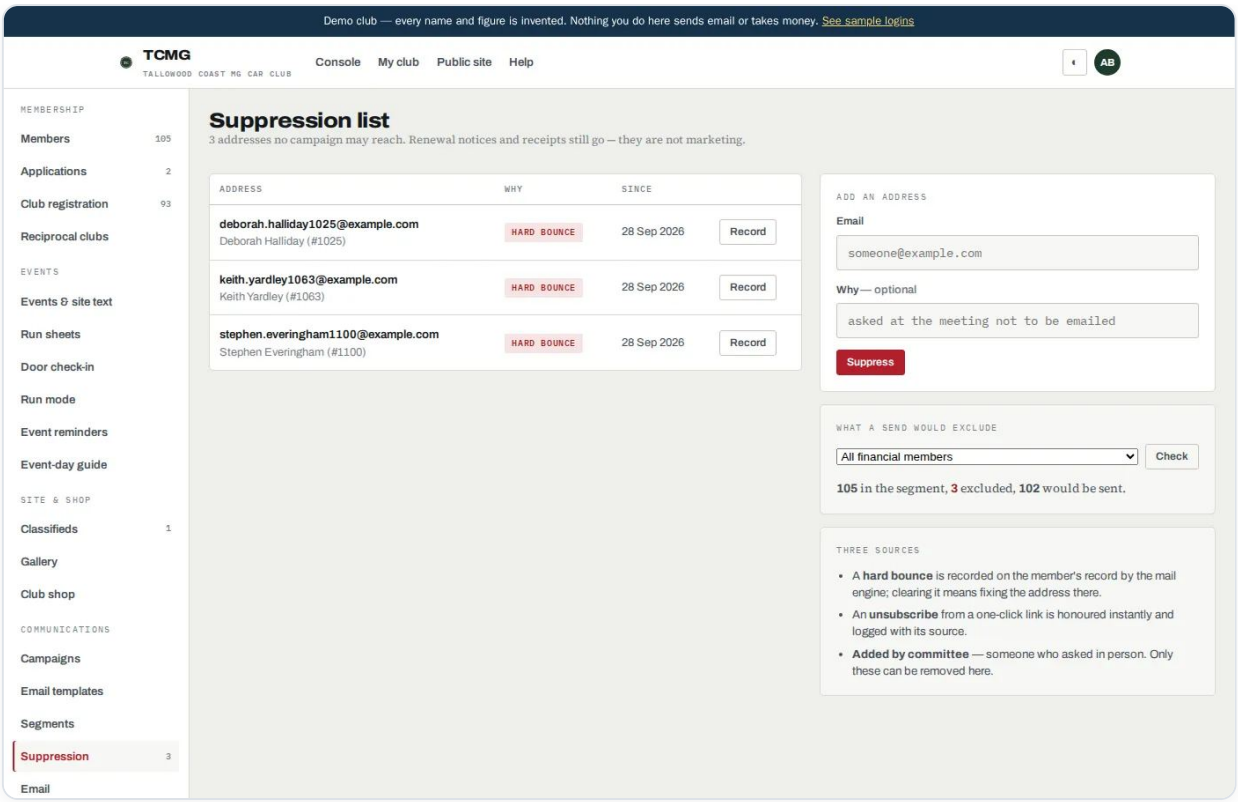
Mode	What happens
Log only	Nothing is sent; each email is written to the log. Used while a club is being set up.
Test	Every email goes to the committee's **test inboxes** instead of members, with a banner and the real recipient in the subject. A big send comes through as three samples and one summary.
Live	Emails go to members. Made-up addresses are never sent to.

The mode, sending address and test inboxes are changed on **Club → Email sending**, by the Club settings role — see Running the site. **Send a test email** on the Email screen checks the whole path.

> If someone says an email never arrived, look at the log on this screen first. It says whether it was sent, skipped (and why), held or failed.

Unsubscribes, bounces and the suppression list

Communications → Suppression lists addresses no campaign may reach. Receipts, renewal notices and booking reminders still go to them — those aren't marketing.



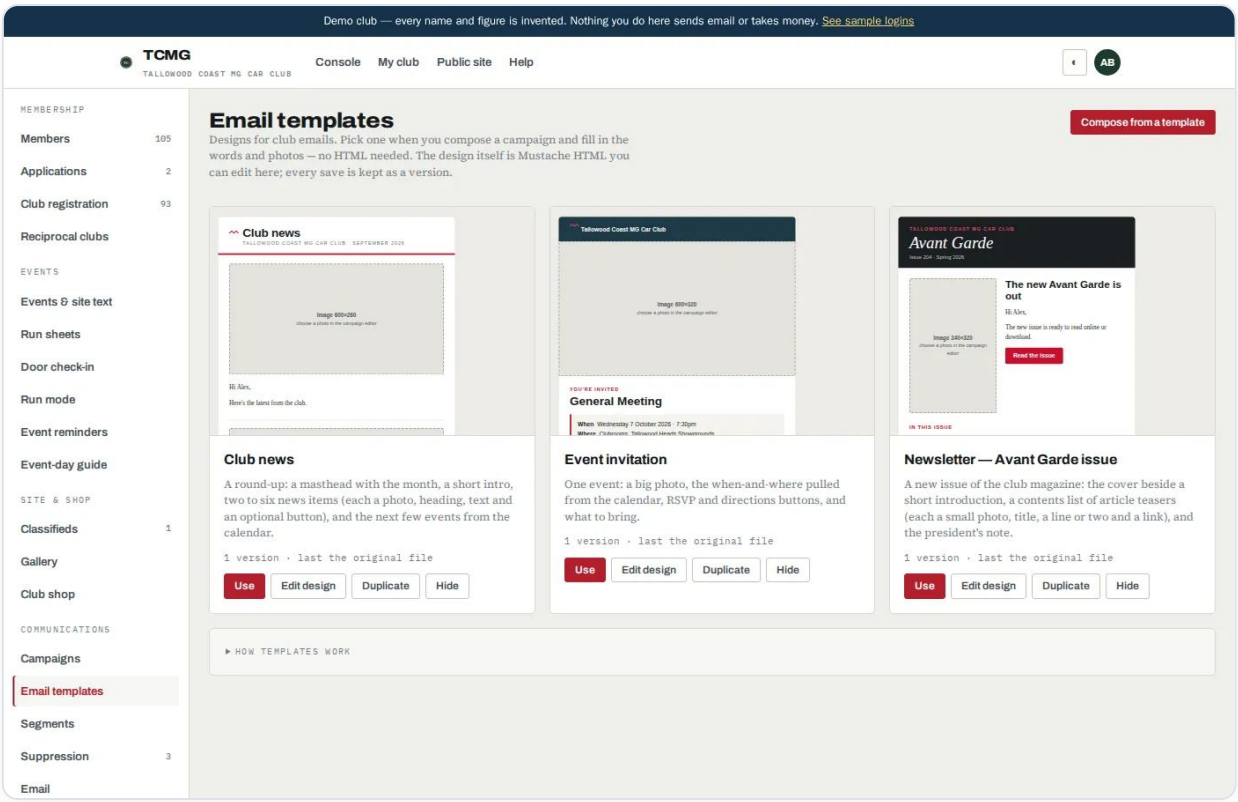
The suppression list.

- **Unsubscribes** — a member who uses the one-click unsubscribe link in a campaign is suppressed straight away.
- **Hard bounces** — an address that doesn't exist is suppressed by the mail system and flagged on the member's record. Fix the address there to clear it.
- **Added by the committee** — someone who asked in person. Type the address and press **Suppress**; only these can be removed here.

Under **What a send would exclude**, choose a segment and press **Check** to see how many it would skip.

Email templates

Communications → Email templates holds the designs campaigns are made from. Most clubs never need to change them.



The email designs.

- **Use** starts a campaign from a design.
- **Edit design** opens its source — Mustache HTML — with a live preview. **Save as new version** keeps every earlier version; **Restore this version** brings one back, and **Reset to the original file** goes back to the design the platform supplied. A design that doesn't render isn't saved.
- **Duplicate** makes your own copy to experiment on. **Hide** takes a starter design out of the list.

A campaign keeps the design version it was written with, so changing a template never changes an email that has gone. On a draft, **Use the latest version** switches it to the newest design.

Sending limits and good practice

- Each club has a daily limit on email, shown on the Email screen under **Today** (2,000 a day unless the platform has set otherwise). Big sends are paced by the queue, so a newsletter to the whole club is well within it.
- Send club-wide news to **All financial members**, not everyone who ever joined: lapsed members are more likely to mark it as spam, which harms delivery for everyone.
- Keep subjects plain and specific ("Spring run: meeting point changed"). Avoid all capitals and exclamation marks.
- Always send a test first, and read it on a phone.

Quick answers

If…	Then…
A campaign can’t be sent	A photo is still a grey placeholder — the red notice names it. Choose a photo and save.
Members say they didn’t get it	Check the mode on the Email screen: in test mode, emails go to the test inboxes. Then check the campaign’s per-recipient log and the suppression list.
Someone wants no more newsletters	Add their address on **Suppression**. They’ll still get receipts and booking reminders.
I changed a template but an old email didn’t change	That is on purpose. On a draft, **Use the latest version** switches it.

FOR THE TREASURER ROLE

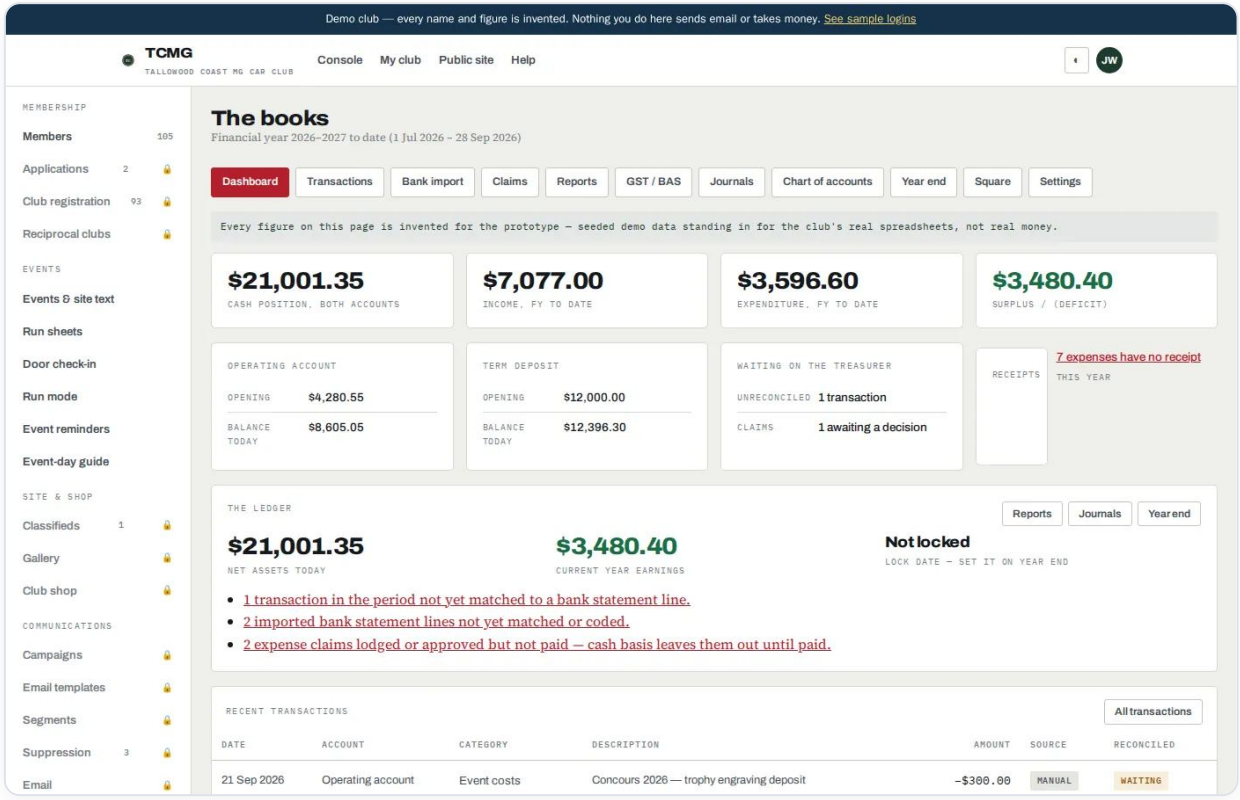
The books

Transactions, bank import and matching, expense claims, card payments, GST, the Xero-style reports, journals, year end and the AGM statement.

The Treasurer role keeps your club's books: every dollar in and out, the bank statements, expense claims, card payments, GST, and the reports for the committee, the AGM and the accountant. The books are a double-entry ledger kept on the **cash basis** — money is recorded when it moves — and laid out the way Xero lays things out, so no Xero subscription is needed. The financial year runs 1 July to 30 June.

Everything is under **Finance → The books**. The tabs along the top lead to each part: Dashboard, Transactions, Bank import, Claims, Reports, GST / BAS, Journals, Chart of accounts, Year end, Square and Settings.

The dashboard

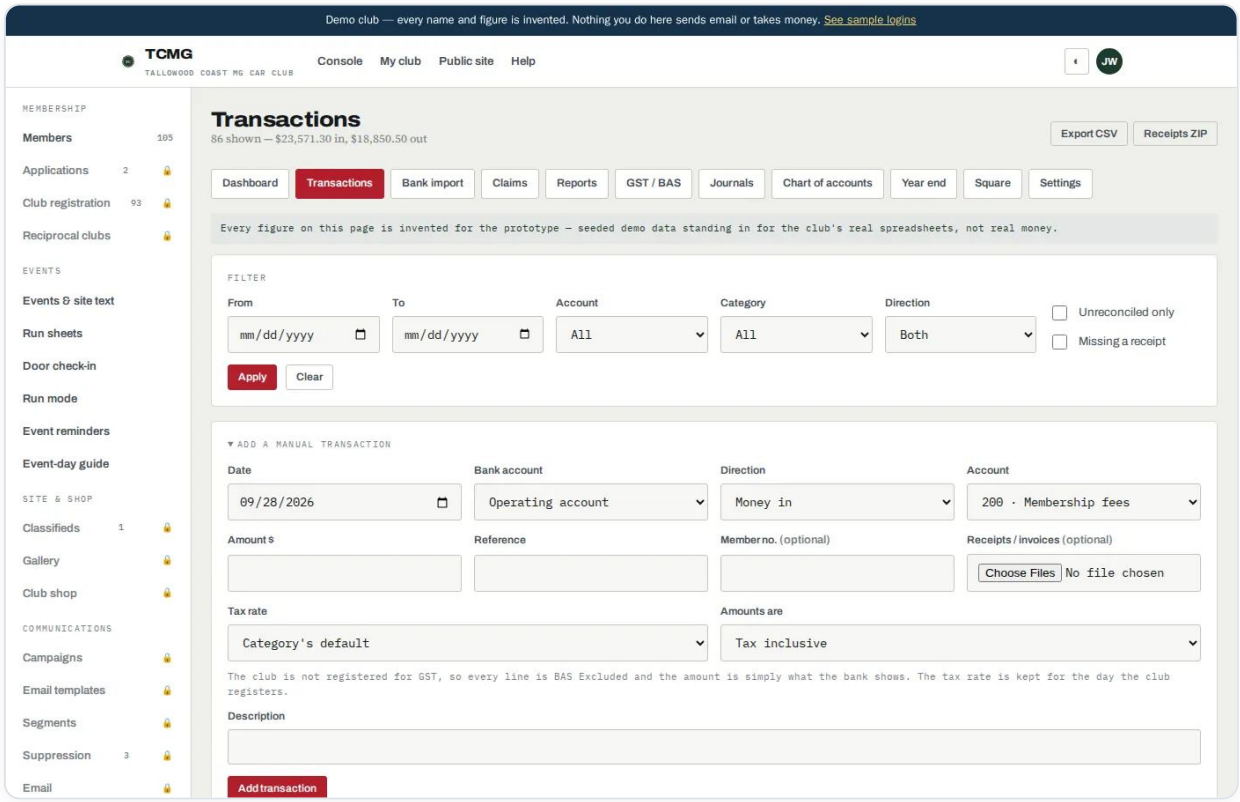


The books dashboard.

- **Cash position**, **income** and **expenditure** for the financial year to date, and the surplus or deficit.
- Each bank account's opening balance and balance today.
- **Waiting on the Treasurer**: transactions not yet matched to the bank, claims awaiting a decision, and expenses with no receipt.
- **The ledger**: net assets, current year earnings, the lock date, and anything an accountant would ask about before the year closes.

Transactions

Card payments made on the site — renewals, joining fees, shop orders, event tickets — post themselves to the books. Everything else you enter: bank transfers from members, cash from the meeting table, bills paid, donations.



Adding a transaction by hand.

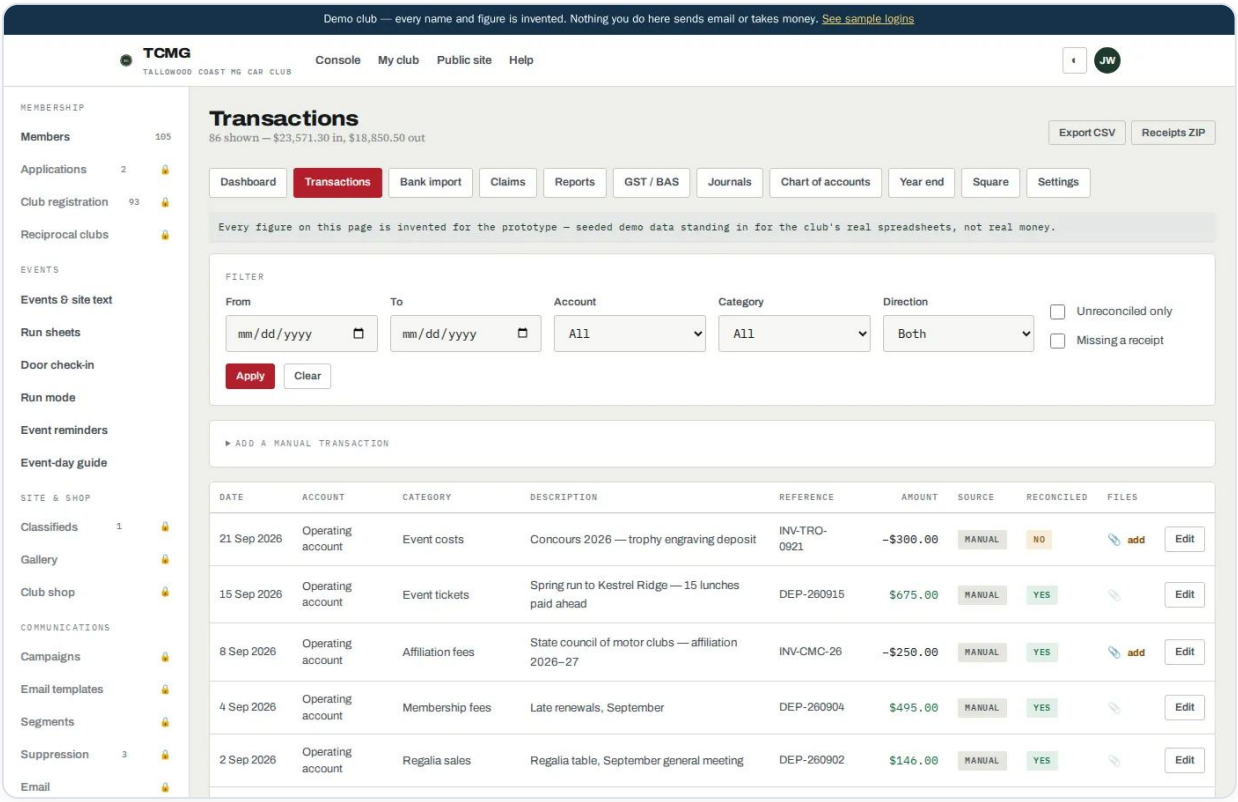
To add a transaction

1. **The books → Transactions**, open **Add a manual transaction**.
2. Choose the **Date**, the **Bank account** the money went in or out of, the **Direction** (money in or money out) and the **Account** it belongs to — for example 433 Insurance, or 200 Membership fees.
3. Enter the **Amount**, a **Reference** (the invoice or deposit number) and a **Description**. Add the **Member no.** if a member paid it.
4. Attach the receipt or invoice (a photo or PDF).
5. Press **Add transaction**.

The account list includes the balance-sheet accounts as well as income and expenses. Use them for money that isn't income or spending: paying the BAS to **820 GST**, moving money into a term deposit, or a loan repayment.

Tax rate and **Amounts are** only matter once the club is registered for GST (see below). Until then every line is BAS Excluded and the amount is simply what the bank shows.

Finding and fixing transactions

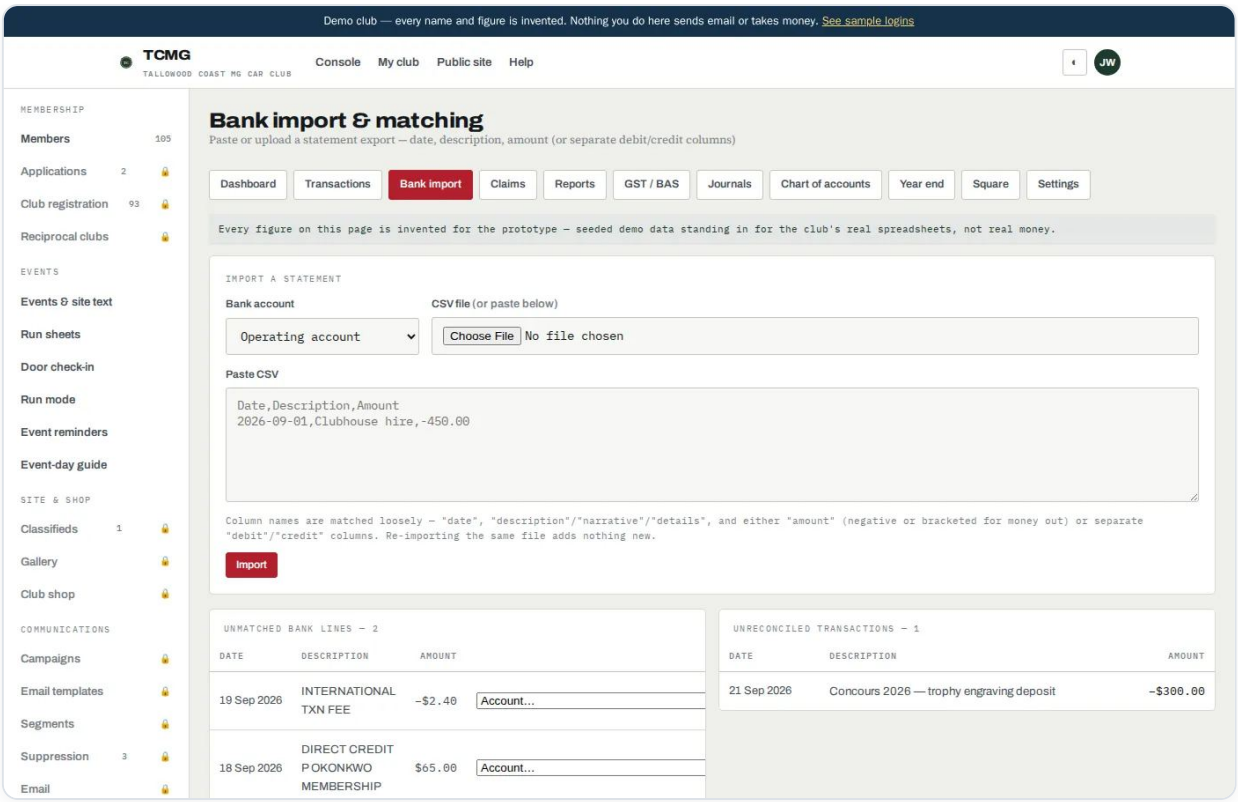


The transactions list.

- Filter by dates, bank account, account (category), direction, **Unreconciled only** or **Missing a receipt**.
- **Edit** changes a line. Lines that came from the site are marked **auto**.
- Every line has a 📎 paperclip: click it to attach, rename or delete receipts and invoices. Only the Treasurer (and a claimant, for their own claim) can open them.
- **Export CSV** downloads the list; **Receipts ZIP** downloads a period's receipts for the auditor.

Bank import and matching

Importing the bank statement is how you know the books agree with the bank.



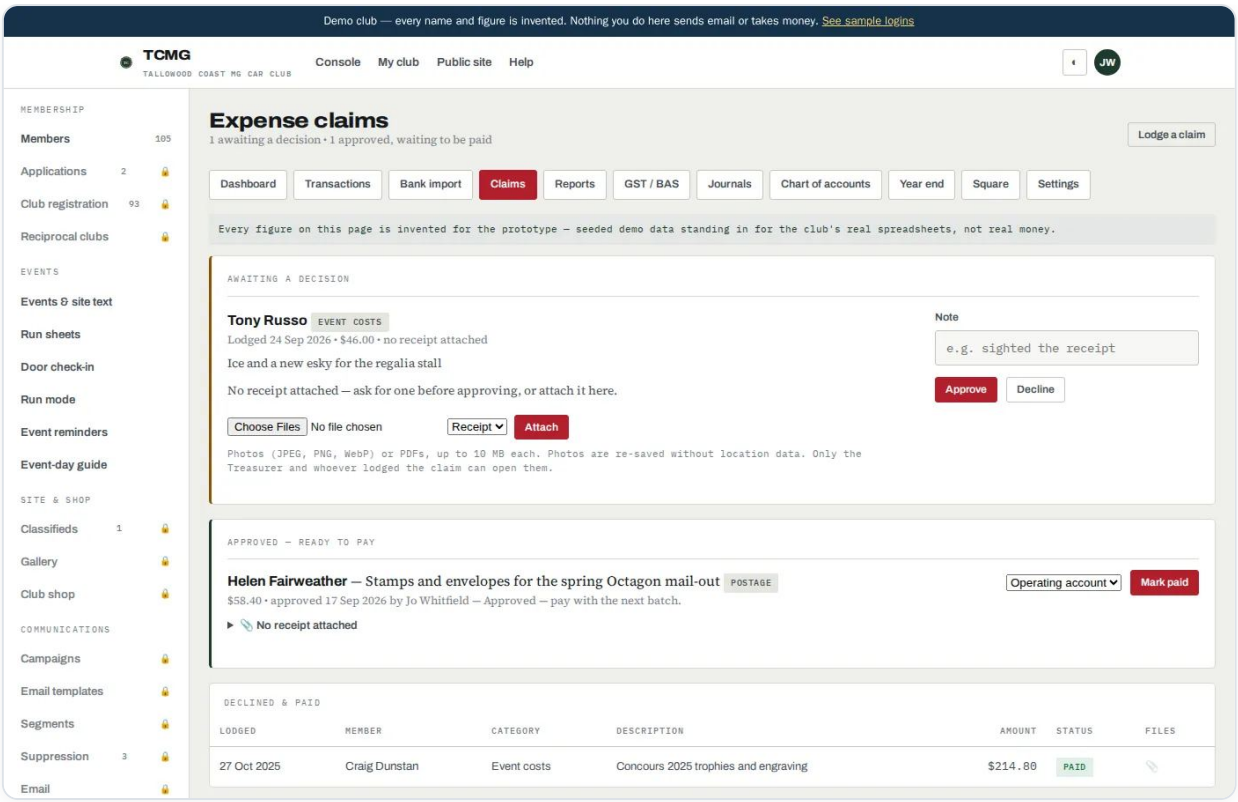
Bank import and matching.

1. Download a CSV statement from the bank's internet banking.
2. **The books → Bank import**: choose the **Bank account** and the file (or paste it), and press **Import**. Importing the same statement twice adds nothing new.
3. Lines that match a transaction already in the books tick themselves off.
4. For each line left under **Unmatched bank lines**: match it to a suggested transaction, or choose its account and press **Create transaction** — for a bank fee, say, or a member's direct deposit.

Undo beside a matched line un-matches it. The dashboard counts what is still unmatched.

Expense claims

Any committee member lodges their own claim under **Finance → Expense claim**: the amount, what it was for, a description, and photos or PDFs of the receipts.



Claims waiting for a decision, and ready to pay.

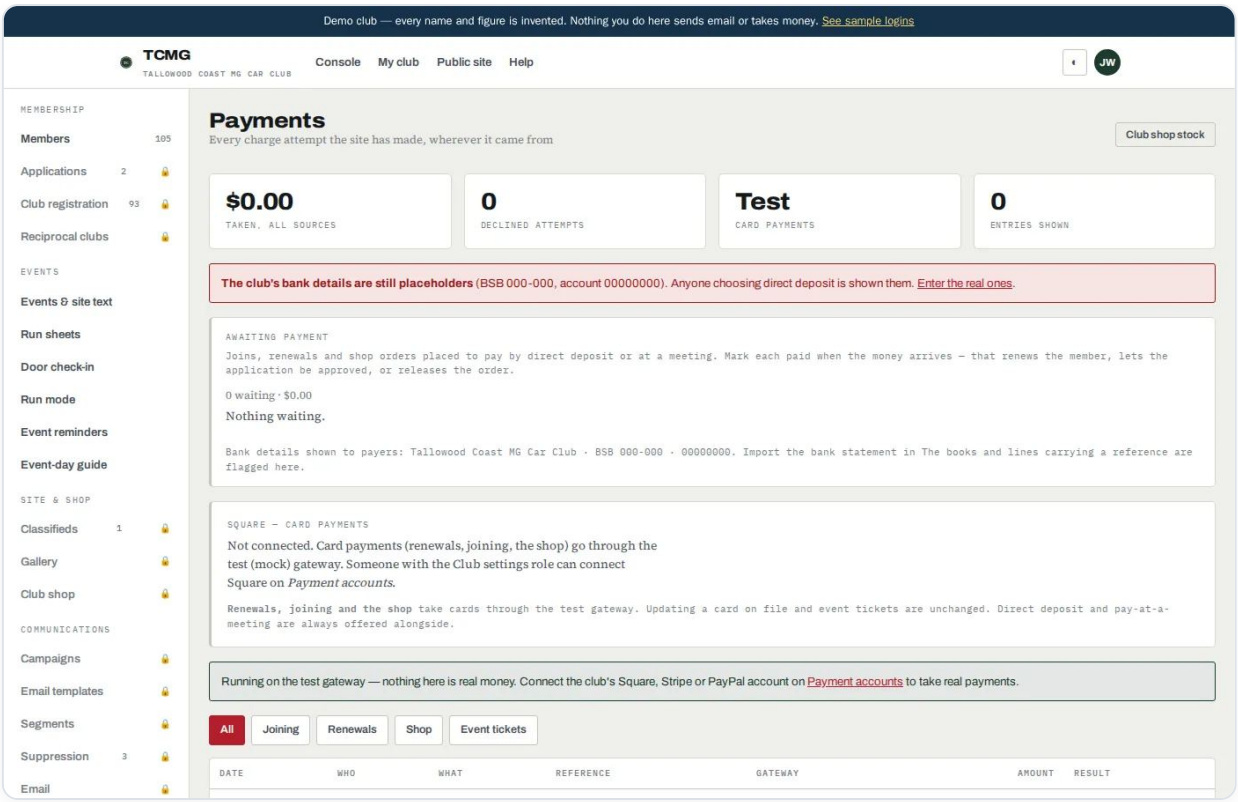
1. In **The books** → **Claims**, check the claim and its receipts. No receipt? Ask for one, or attach it here.
2. Press **Approve**, or **Decline** with a note — the claimant is emailed either way.
3. Pay the claimant from the bank, then choose the account it was paid from and press **Mark paid**. That writes the transaction and carries the receipts onto it.

> On the cash basis, a claim approved but not yet paid isn't in the books. The Year end checklist reminds you of any still waiting.

Card payments, Square and awaiting payment

Members pay by card, by direct deposit or at a meeting.

- **Direct deposit and pay-at-a-meeting** wait under **Finance** → **Payments** → **Awaiting payment**, each with a reference to look for on the bank statement. When the money arrives, press **Mark paid** and choose Direct deposit or Cash; that renews the member, lets the application be approved, or releases the shop order. If they won't pay, **Cancel** it — shop stock goes back on the shelf.
- **Card payments through Square** land first in a **Square (clearing)** account: money Square is holding for the club. Square takes its fee from each payment, then pays the rest into the bank in a lump (a payout). On **The books** → **Square**, press **Fetch from Square** to bring in payments, fees and payouts. Each payout becomes a transfer to the bank account and matches the deposit when you import the statement. After each payout the clearing balance drops back towards nil.
- **Finance** → **Reconciliation** lines up card payments, shop orders and event tickets against what the payment company settles. Tick each one once it is on the bank statement.



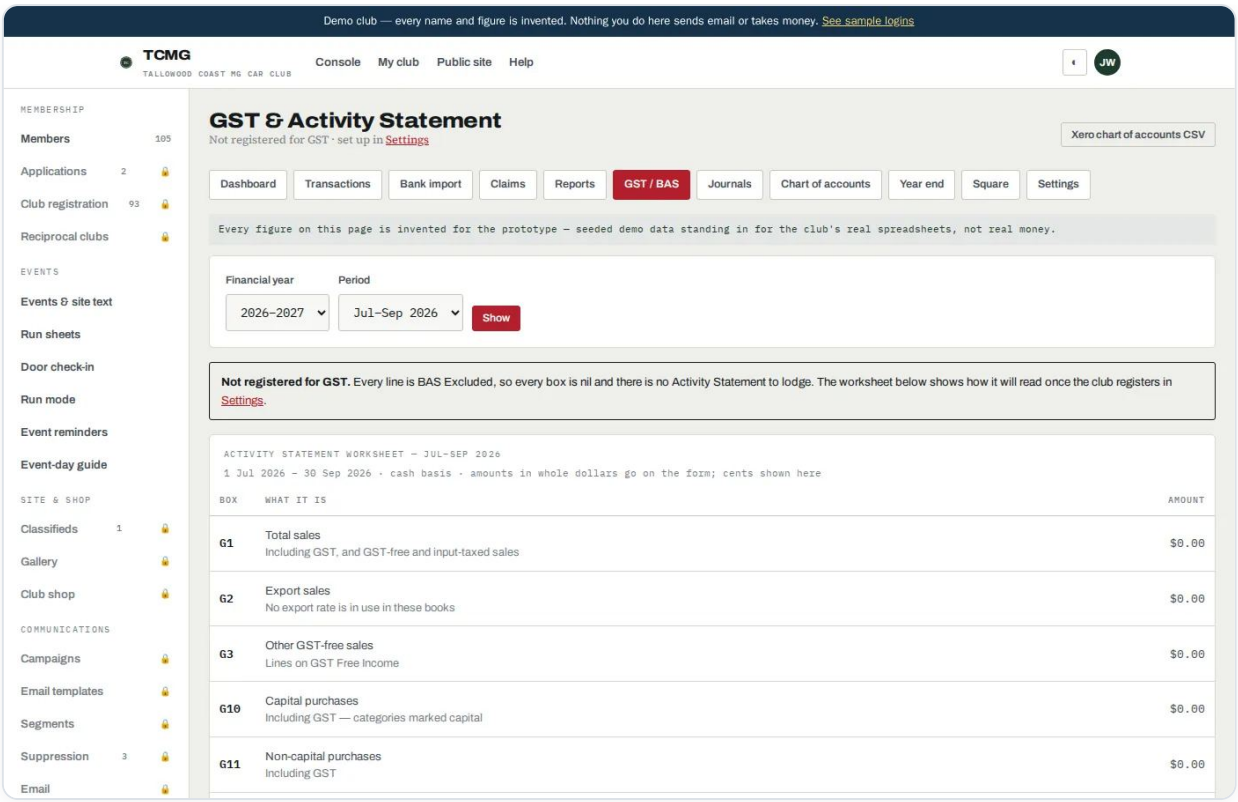
Payments and Awaiting payment.

Connecting Square, Stripe or PayPal is done by the Club settings role on **Payment accounts** — see Running the site.

GST and the Activity Statement

Most small clubs aren't registered for GST. If yours is, tick **Registered for GST** in **The books → Settings**, with the date and the reporting period (monthly, quarterly or annually). Lines dated before the registration date stay BAS Excluded.

From then on, **The books → GST / BAS** shows the Activity Statement worksheet for any period, laid out as Xero's: G1, G2, G3, G10, G11, 1A and 1B, and the GST payable. Each figure links to the transactions behind it. Check the figures, then lodge through the ATO's Online services or the club's tax agent — nothing is lodged from here.

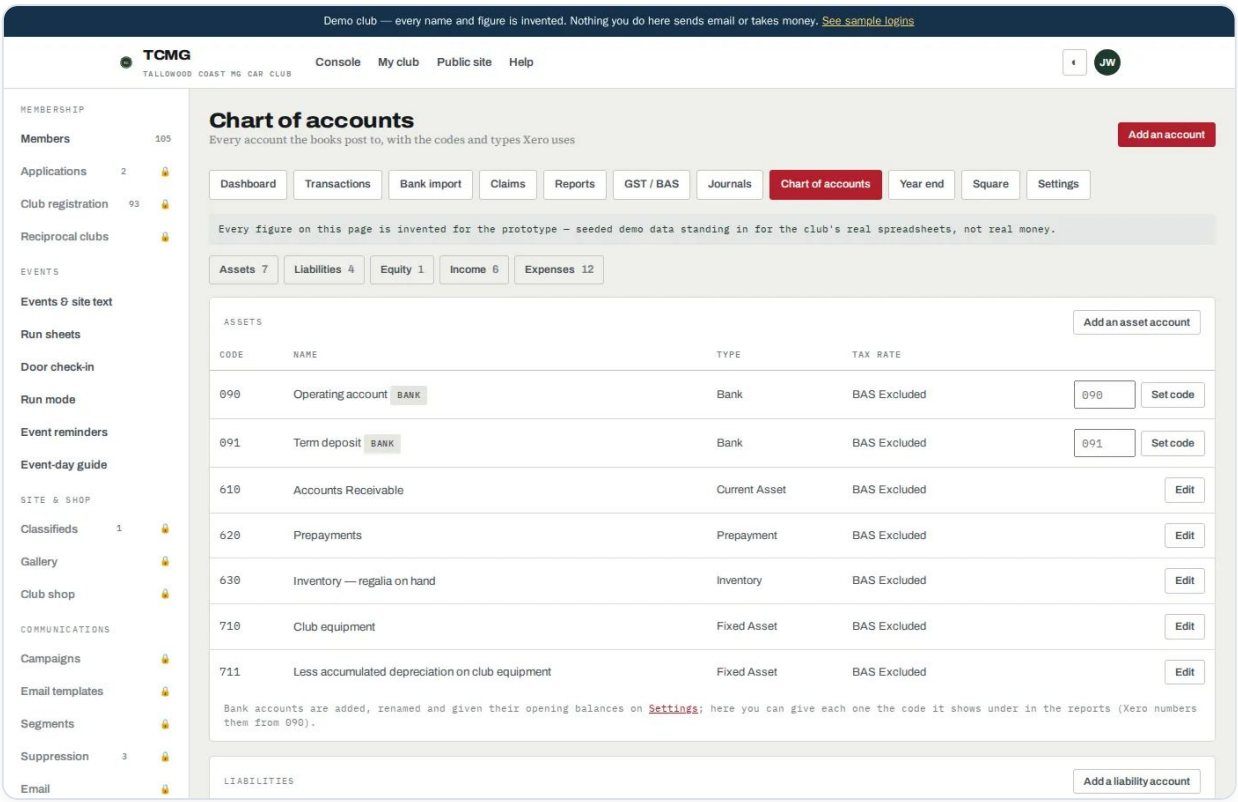


The Activity Statement worksheet.

> Registering is a committee decision to take with the club's accountant. The default tax rate on each account is a suggestion, not tax advice: have the accountant confirm them before the first BAS.

The chart of accounts

The books → Chart of accounts lists every account, grouped like Xero's chart: Assets, Liabilities, Equity, Income and Expenses. Each has a code, a name, a Xero account type and a default tax rate. The codes follow Xero's Australian chart — 090 for the bank, 200 for sales, 820 GST, 960 Retained Earnings — so an accountant finds their way at once.

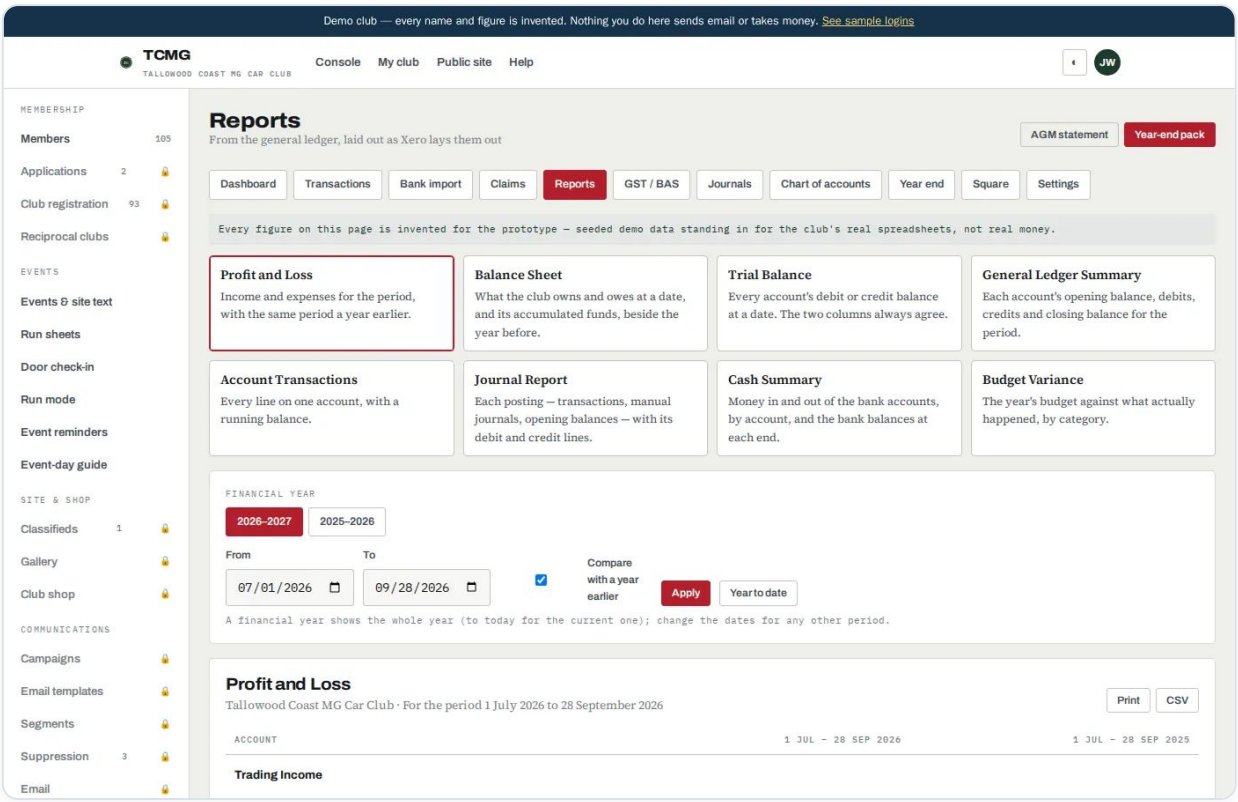


The chart of accounts.

- Add an account for something the club needs to track — “Trophies”, “Rally entries”, “Trailer”. Choose its class, its Xero type, a unique code and its default tax rate.
- Archive an account you no longer use; it keeps its history. An account that has never been used can be deleted.
- GST, Retained Earnings and Suspense are system accounts: they can be renamed but not removed.

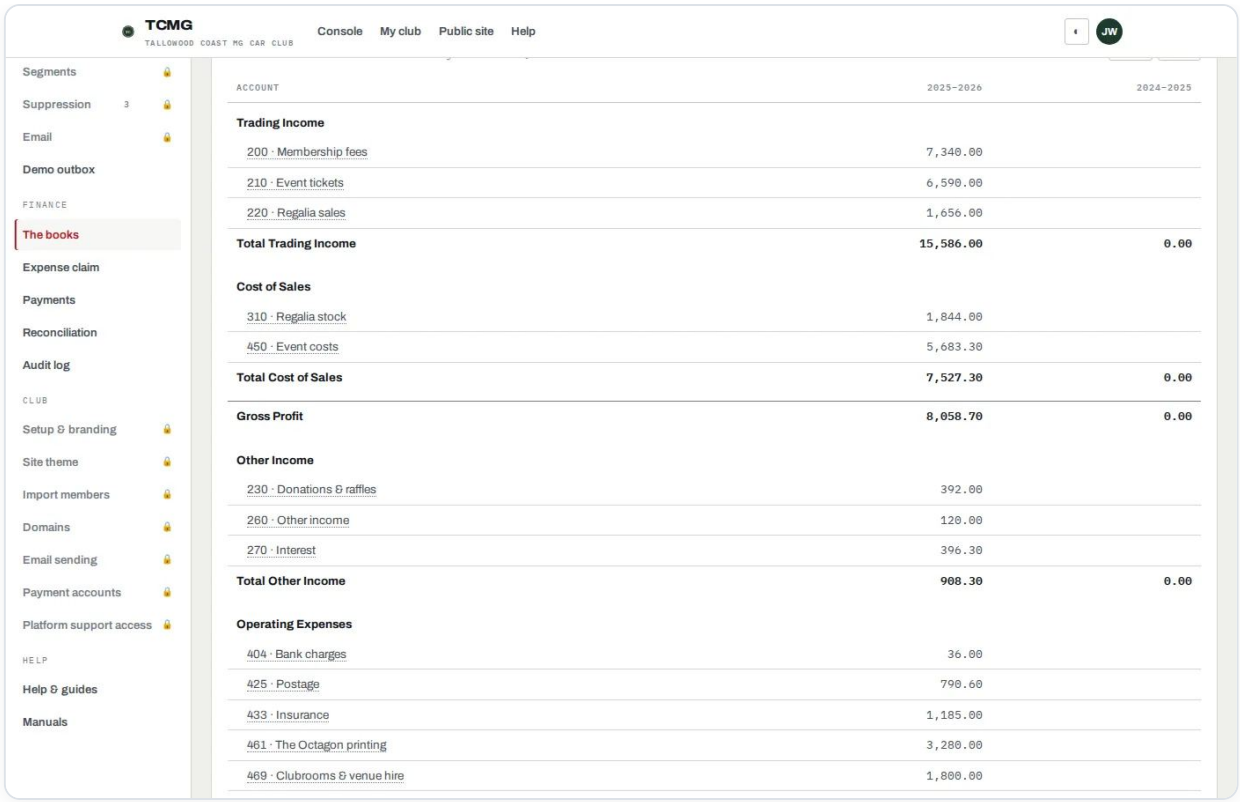
Reports

The books → Reports has every report an accountant expects, laid out as Xero lays them out. Choose a financial year or any dates, and whether to compare with a year earlier.

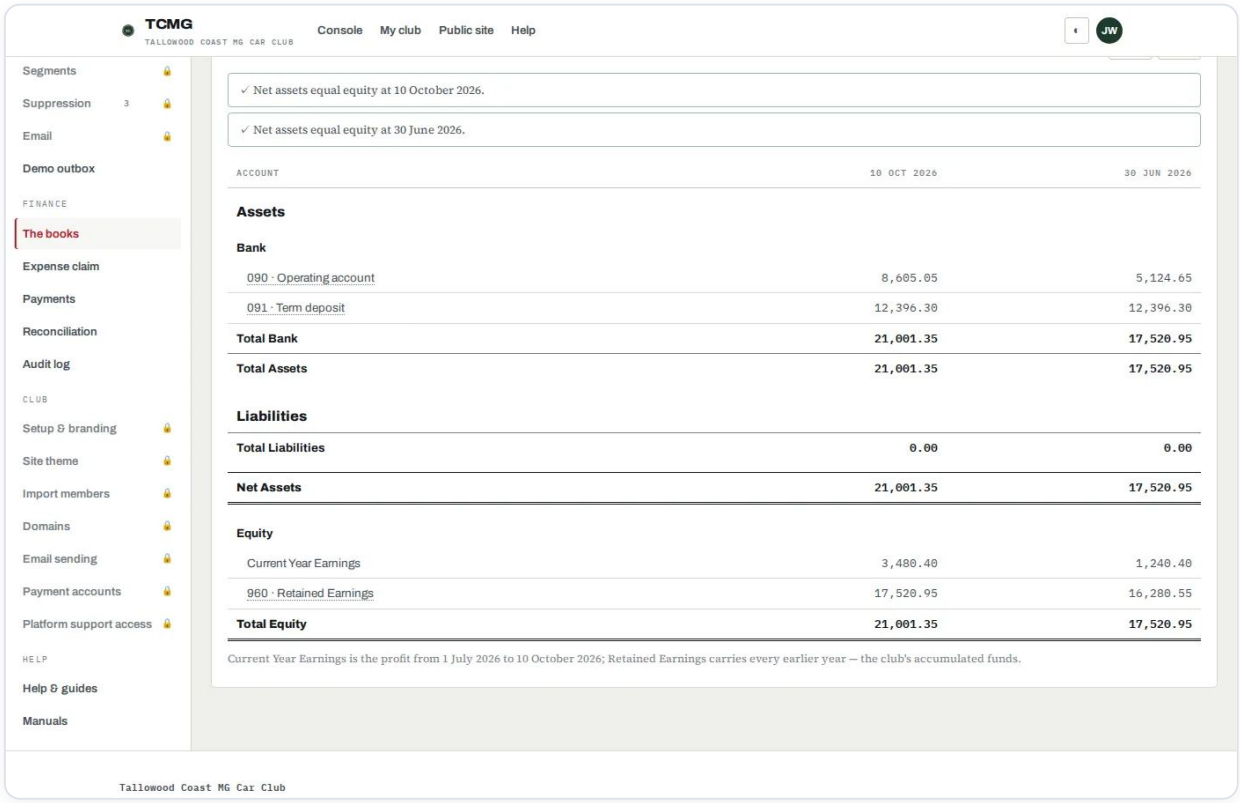


The report centre.

Report	What it shows
Profit and Loss	Income and expenses for the period: Trading Income, Cost of Sales, Gross Profit, Other Income, Operating Expenses, Net Profit — beside the same period a year earlier.
Balance Sheet	What the club owns and owes at a date, and its accumulated funds (Retained Earnings and Current Year Earnings), beside the previous year-end.
Trial Balance	Every account’s debit or credit balance. The two columns always agree.
General Ledger Summary	Each account’s opening balance, debits, credits and closing balance for the period.
Account Transactions	Every line on one account, with a running balance. Click any account in another report to open it.
Journal Report	Each posting — transactions, manual journals, opening balances — with its debit and credit lines.
Cash Summary	Money in and out of the bank accounts, by account, and the bank balances at each end.
Budget Variance	The year’s budget (set in Settings) against what happened.
GST Reconciliation	When registered: the GST account from opening to closing, tied to the Balance Sheet.



Profit and Loss, with the year before alongside.

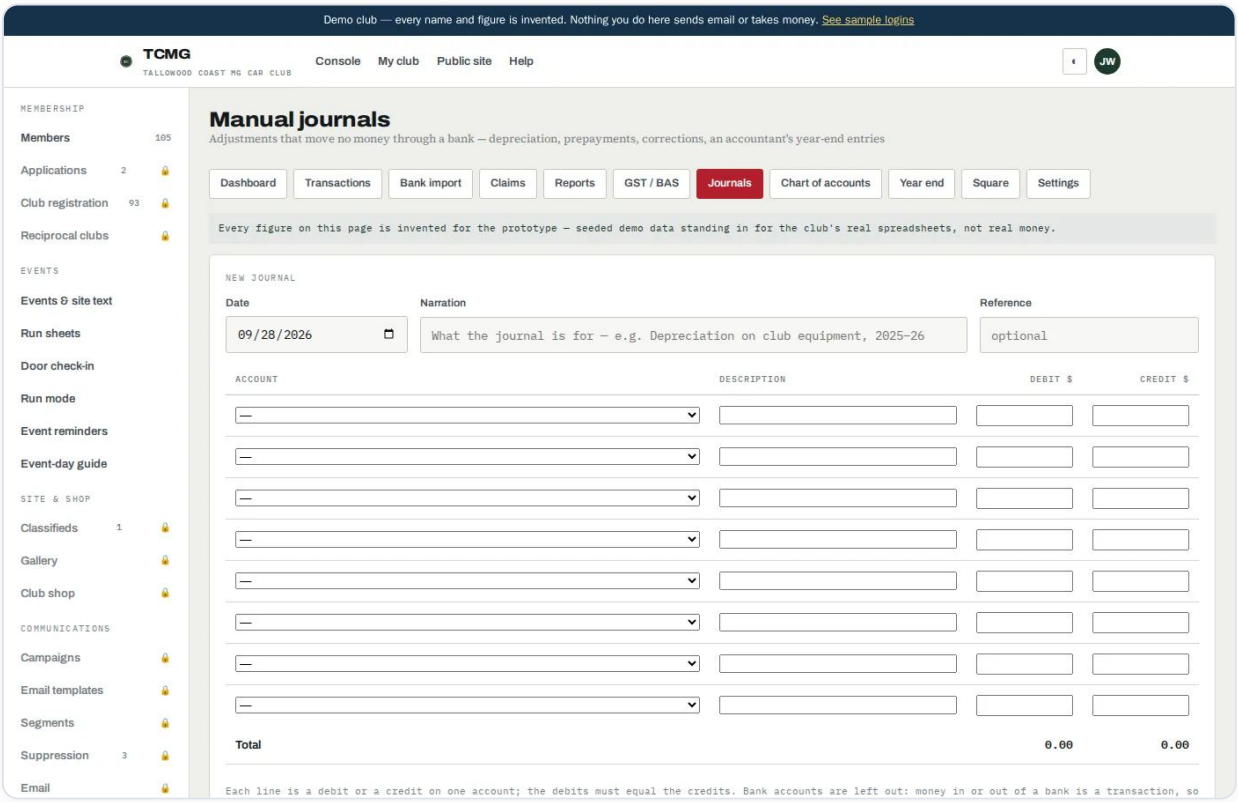


The Balance Sheet. The ticks confirm net assets equal equity.

Every report has **Print** (on the club's letterhead) and **CSV**. If a report's own check ever fails — debits and credits not agreeing, say — it shows a red warning. Look for a line in **Suspense**, and ask the accountant.

Manual journals

A journal records something that moves no money through a bank: depreciation on club equipment, a prepaid insurance premium, a correction, or the accountant's year-end entries. Most clubs need only a few a year.



A new journal.

1. **The books → Journals**, press **New journal**.
2. Give it a **Date**, a **Narration** (what it is for) and a **Reference** if you like.
3. Fill in two or more lines, each an account with a debit or a credit. Bank accounts aren't offered: money in and out of a bank is always a transaction.
4. The debits and credits must be equal — the form says by how much they are out.
5. Save. It changes the reports at once. A journal can be edited later, or voided (it stays on file, marked voided).

> If you aren't sure which accounts to use, ask the accountant for the entry — debits and credits — and type it in as given.

Opening balances

When your club starts using EzyClub's books, two things set where the books begin:

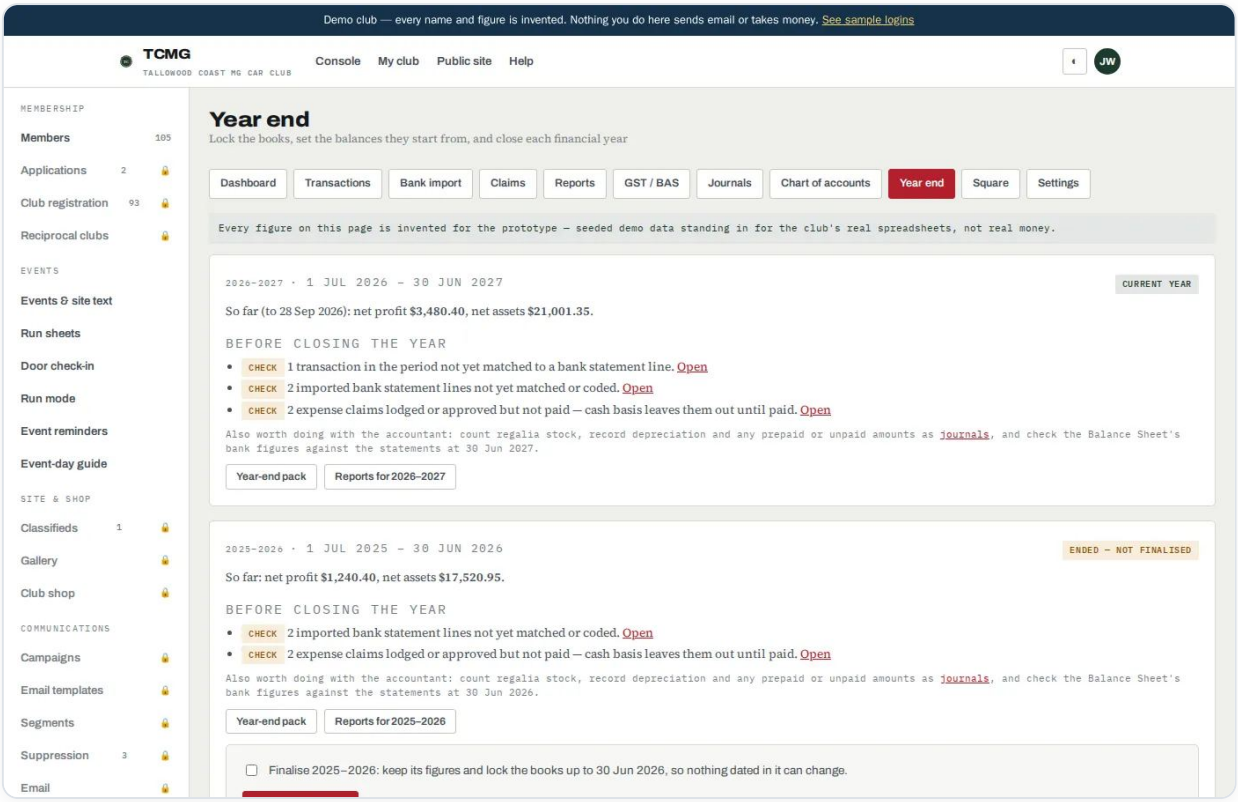
- Each **bank account's opening balance** and date, in **The books → Settings**.

- **Conversion balances** on **Year end**: what the club owned and owed the day before — equipment, regalia stock, prepaid insurance, fees received in advance. Enter each as a debit or credit; Retained Earnings takes the difference: the club's accumulated funds.

Take the figures from the last annual statement, or ask the accountant.

Year end

The books → **Year end** is where each financial year is closed.



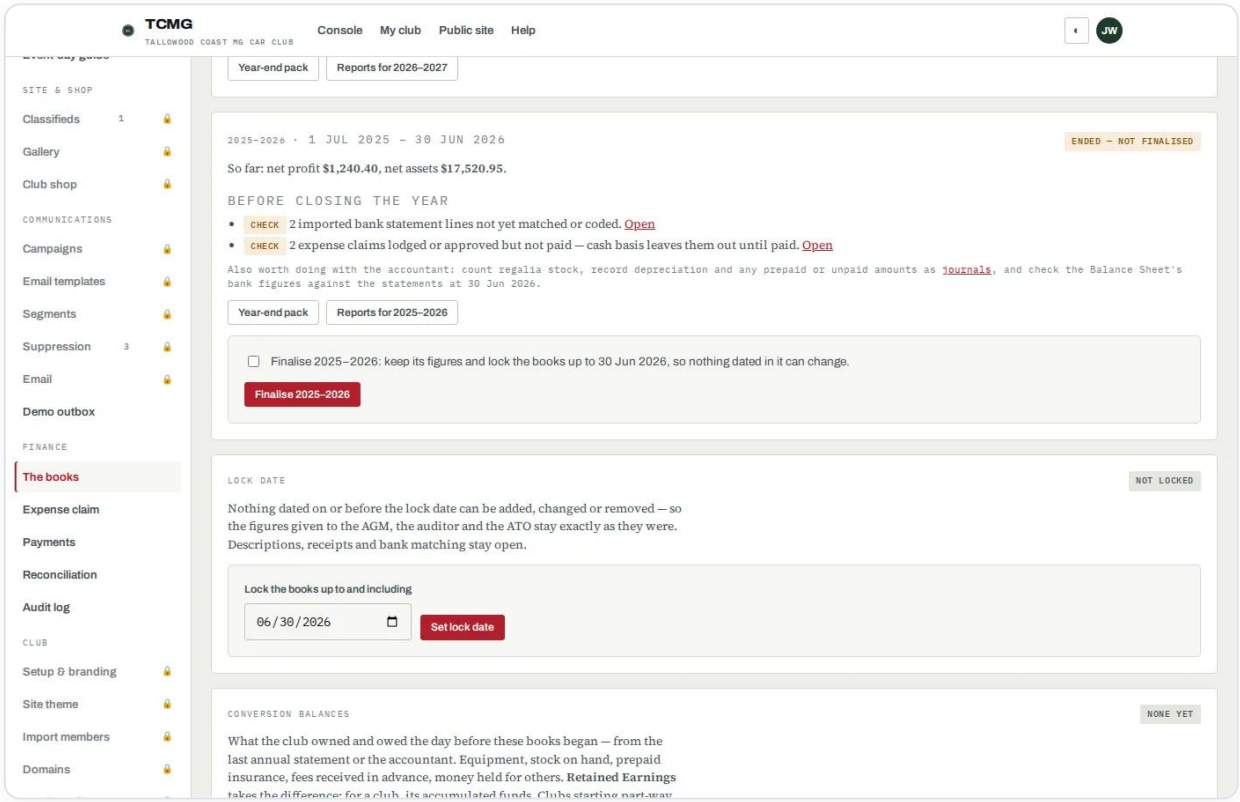
Year end, with the checklist for each year.

To close a year

1. After 30 June, work through the **Before closing the year** checklist: every transaction matched to the bank, every imported line coded, claims paid.
2. With the accountant: count the regalia stock, and record depreciation and any prepaid or unpaid amounts as journals.
3. Check the Balance Sheet's bank balances against the statements at 30 June.
4. Tick the confirmation and press **Finalise** for that year. The year's figures are kept, and the books are locked up to 30 June.
5. Download the **Year-end pack** for the accountant and the AGM.

The lock date

Once a date is locked, nothing dated on or before it can be added, changed or removed — so the figures given to the AGM, the auditor and the ATO stay exactly as they were. Descriptions, receipts and bank matching stay open. Card payments that arrive late for a locked period post on the first open day.

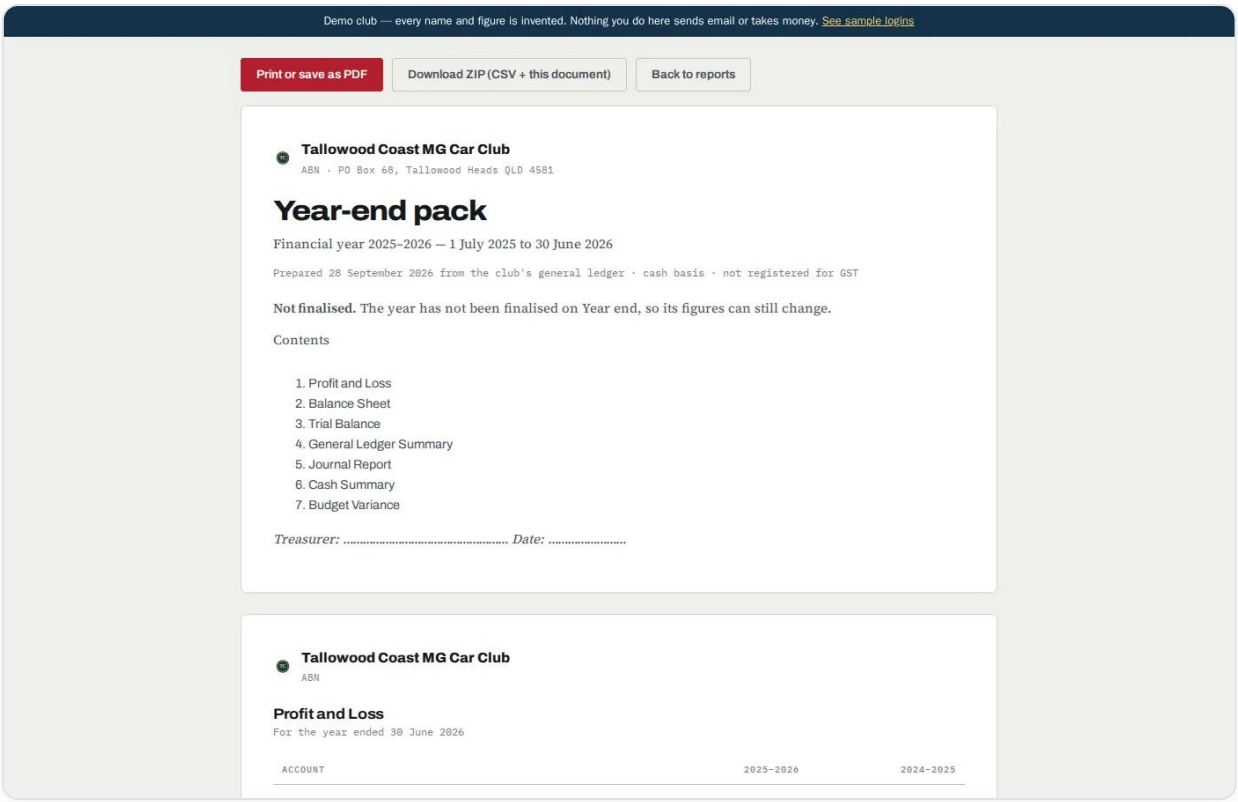


Setting the lock date.

If a finalised year needs a correction, **Reopen** it: the lock moves back to the year before. Make the correction, then finalise again.

The year-end pack

Year-end pack gives every report for the year in one printable document with a cover page (save it as a PDF from the browser's print dialog), or as a ZIP of spreadsheets plus that document — ready to send to the accountant or auditor.

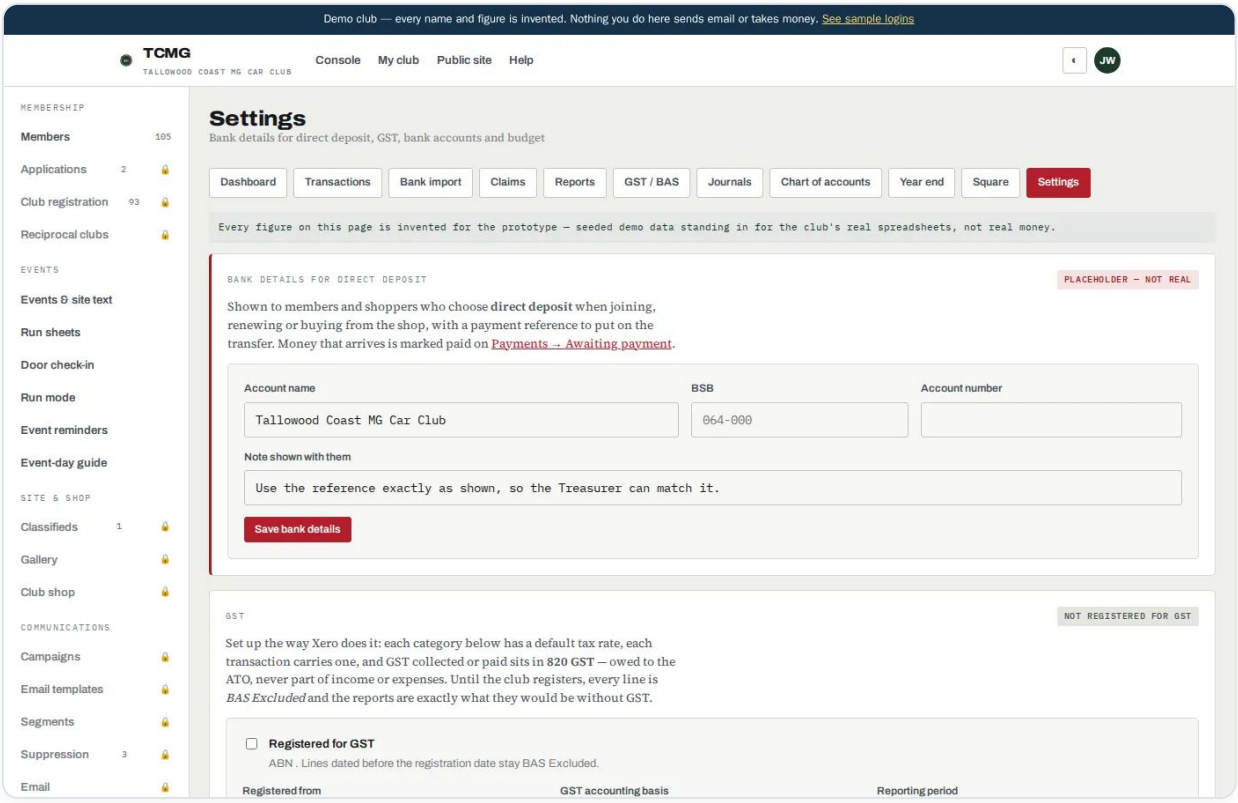


The year-end pack's cover.

The AGM statement

Reports → AGM statement prints the Statement of Income and Expenditure for the year ended 30 June, with a Statement of Assets and Liabilities beside it and a signature line — the page most associations table at their annual general meeting. Check with the accountant what your state's associations law asks of your club.

Settings and the budget



Books settings.

- **Bank details for direct deposit** — shown to members who choose to pay by bank transfer. Until you enter the real ones they are marked as placeholders.
- **GST** — registration, date and reporting period.
- **Bank accounts** — each account's name, opening balance and date.
- **Budget** — a figure per income and expense account for the year, used by the Budget Variance report.

Exports and Xero

Transactions export to CSV with GST columns. For a club that moves to Xero, or an accountant who works in it, the books export in Xero's own import formats: the chart of accounts, each bank account's statement (pre-coded with accounts and tax rates) and the manual journals.

Giving the accountant access

The club's outside accountant or auditor can have the **Accountant** role: read-only access to the books — every report, the ledger, journals and the year-end pack — without the rest of the console. Whoever holds the Roles role adds a member record for them and ticks Accountant (see Roles and access). What they see is in For the club's accountant.

Quick answers

If…	Then…
A member paid by bank transfer	Find the reference on the statement, then **Payments → Awaiting payment → Mark paid → Direct deposit**.
A payment says “card — unconfirmed”	The card company didn’t answer in time. Check its dashboard: if the payment went through, press **Card went through** on the awaiting-payment line; if not, **Cancel** it.
“The books are locked up to…”	That date is locked. Date the correction after it, or reopen the year on Year end.
Suspense has a balance	A transfer with no matching line in the other account, or a line on a deleted account. The dashboard and Year end say which.
The Balance Sheet bank figure doesn’t match the statement	Import the statement and match every line; check the opening balance in Settings.

FOR THE ACCOUNTANT ROLE (READ-ONLY)

For the club's accountant

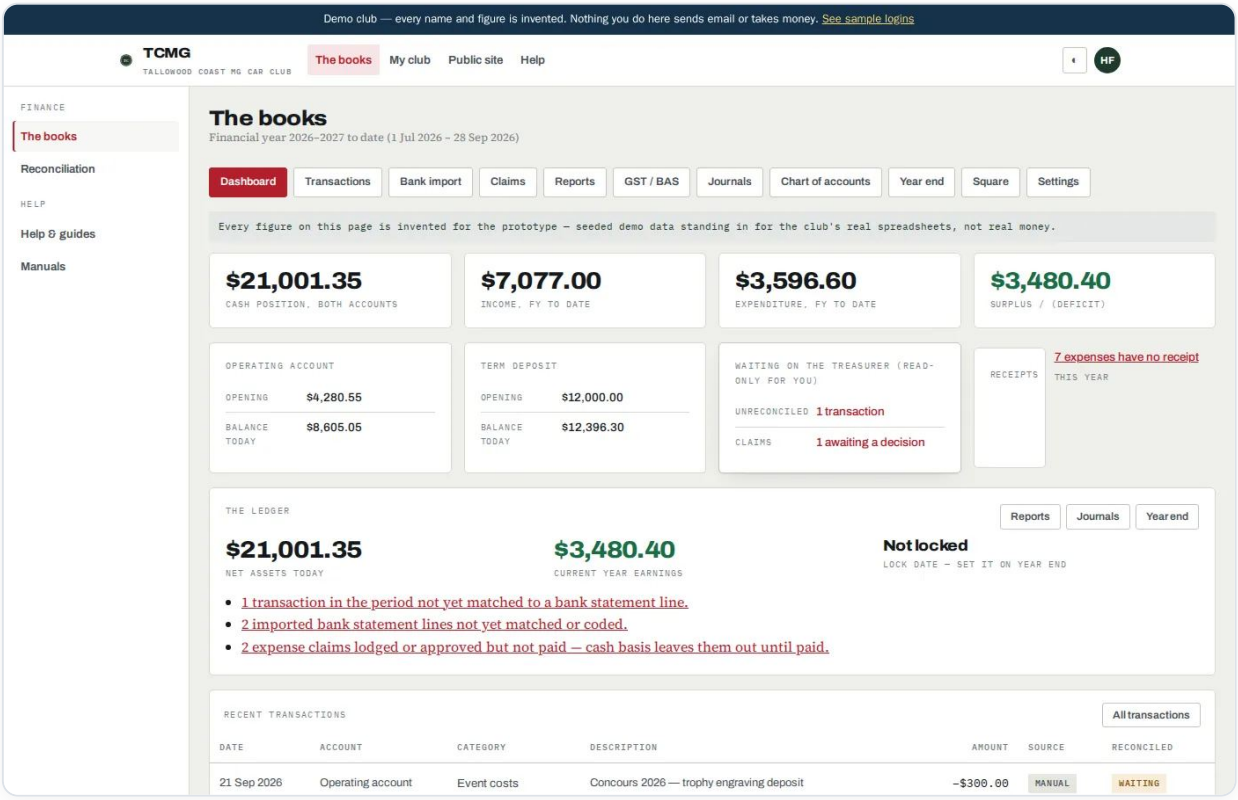
What you can see, the reports and the year-end pack, and how the ledger is kept.

This guide is for your club's outside accountant or auditor. The club has given you the **Accountant** role: read-only access to its books on EzyClub — every report, the ledger, journals, receipts and the year-end pack, with their exports. You can see everything the Treasurer sees in the books, and change nothing.

Signing in

1. The club adds you as a person on its member list, with your email address, and ticks the Accountant role. You get an email with a link to choose a password.
2. Sign in on the club's website with **Member login**.
3. You land in **The books**. The sidebar shows only what the role opens: **The books** and **Reconciliation**, plus the help pages.

You don't need the committee's console role, and you won't see member records, the committee's emails or anything outside the finances.



The books, as the Accountant role sees them.

> Screens you open show the figures without the forms to change them. If you spot something that needs correcting, tell the Treasurer — or give them the journal to post.

How the books are kept

- **Cash basis.** Money is recorded when it moves through a bank or the card company's clearing account. There are no invoices or bills; receivables and payables appear only if the Treasurer posts them as journals.
- **Double entry.** Every cash transaction the Treasurer enters — and every card payment the site takes — posts balanced lines to the ledger:
  - money in: Dr the bank (gross), Cr the income account (net), Cr 820 GST (the GST);
  - money out: Cr the bank, Dr the expense account (net), Dr 820 GST.
- **Transfers** between two bank accounts (a card-company payout, a move to a term deposit) post once: Dr the receiving account, Cr the paying one.
- **Card payments** land in a clearing account first. The card company's fee is an expense against it, and each payout to the bank is a transfer out of it.
- **Opening balances.** A bank account's opening balance posts Dr the bank, Cr 960 Retained Earnings on its opening date. Other opening balances are a conversion journal dated the day before the conversion date, balanced by Retained Earnings.
- **Retained Earnings and Current Year Earnings** are worked out as Xero does: no closing entries are posted. Current Year Earnings is the profit from the start of the financial year; Retained Earnings carries everything posted to it plus every earlier year's profit.
- **GST**, when the club is registered, is Xero's cash-basis model: each line carries a tax rate, and GST collected or paid sits in 820 GST. Manual journals carry no GST (BAS Excluded).
- **The financial year** runs 1 July to 30 June.

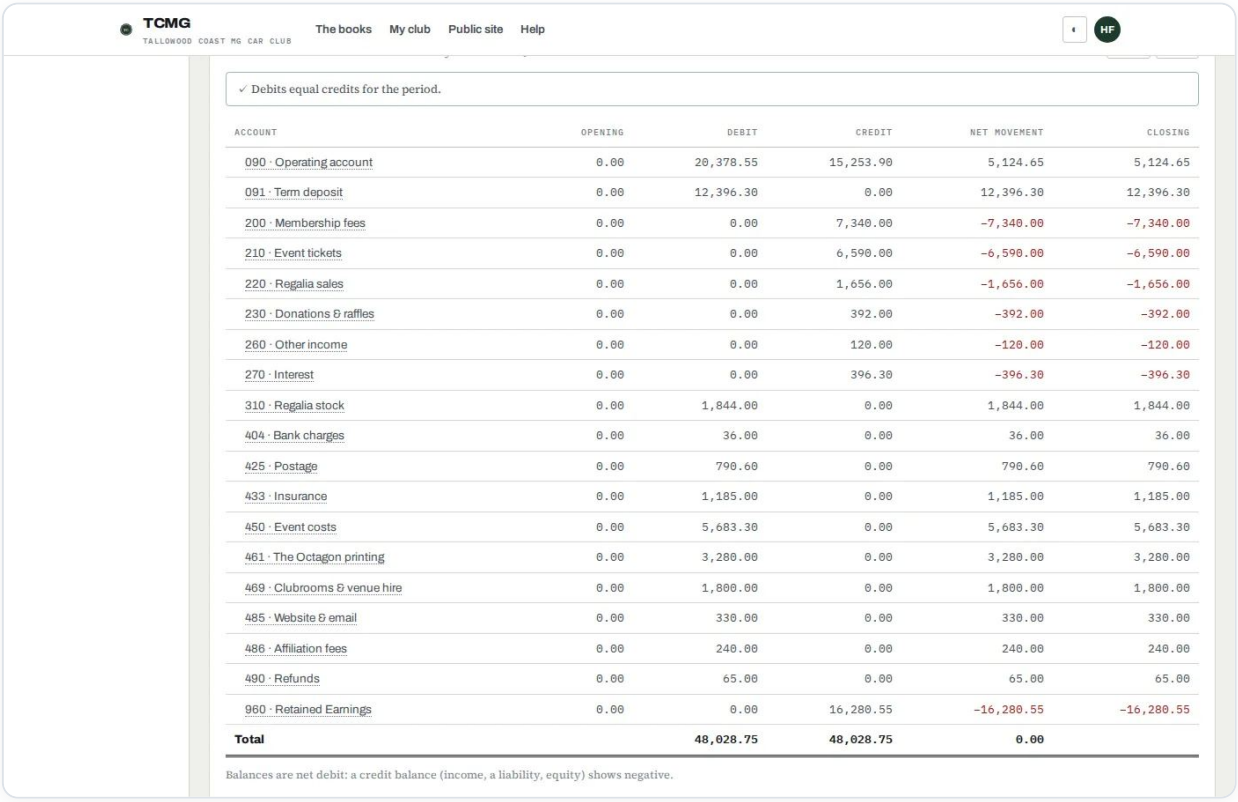
The chart of accounts

The chart follows Xero's Australian default codes and account types: 090 onwards for bank accounts, 200s for income, 300s and 400s for expenses, 610 Accounts Receivable, 620 Prepayments, 630 Inventory, 710/711 equipment and its accumulated depreciation, 800 Accounts Payable, 820 GST, 835 Membership fees in advance, 850 Suspense and 960 Retained Earnings. The club may have added its own. **The books → Chart of accounts** lists every account with its Xero type and default tax rate.

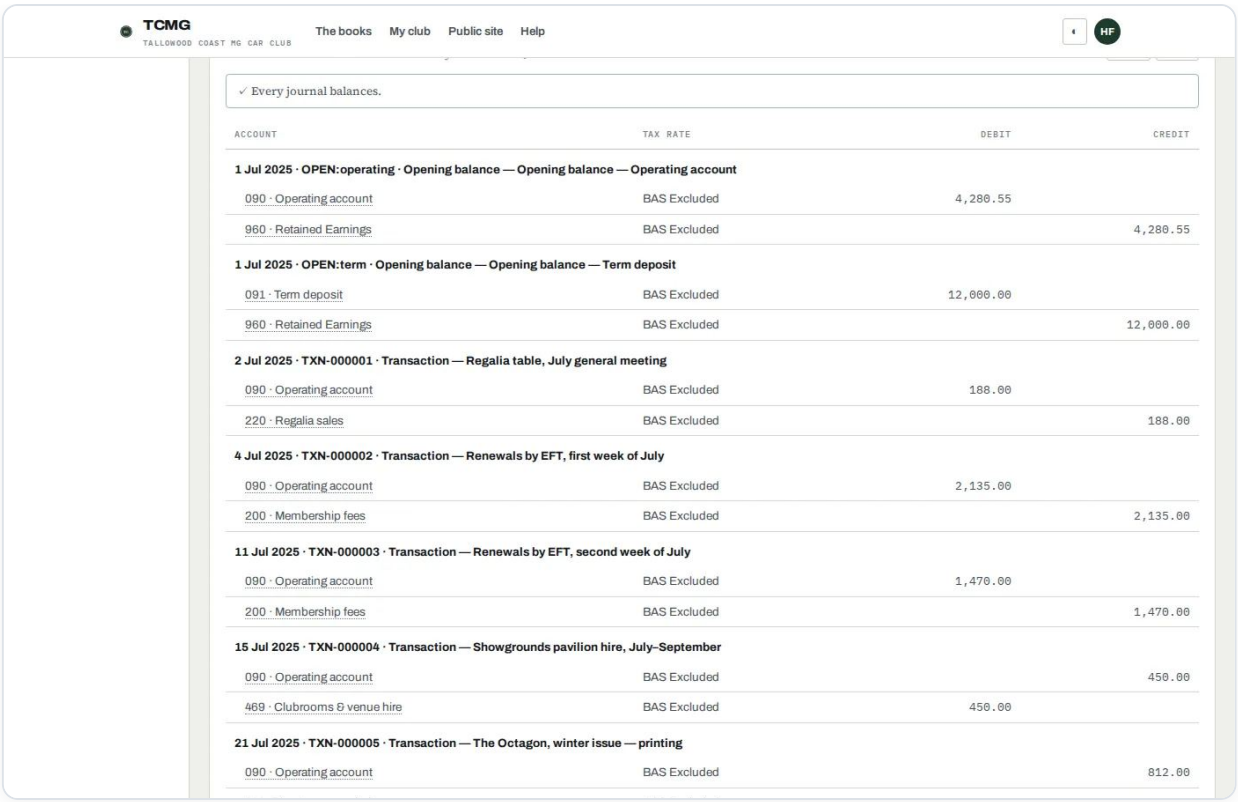
The reports

The books → Reports has each report in Xero's layout and wording. Choose a financial year or any dates; the Profit and Loss and Balance Sheet show the prior period beside the current one. Every report prints on the club's letterhead and exports to CSV.

Here	In Xero	Notes
Profit and Loss	Profit and Loss	Trading Income, Cost of Sales, Gross Profit, Other Income, Operating Expenses, Net Profit.
Balance Sheet	Balance Sheet	Bank, current, fixed and non-current assets; current and non-current liabilities; equity with Current Year Earnings.
Trial Balance	Trial Balance	Balance-sheet accounts to date; income and expenses for the year to date.
General Ledger Summary	General Ledger Summary	Opening, debits, credits, net movement and closing per account.
Account Transactions	Account Transactions	Every line on one account, with a running balance.
Journal Report	Journal Report	Each posting’s debit and credit lines, with its source.
Cash Summary	Cash Summary	Cash in and out by account, other movements, and bank balances at each end.
Budget Variance	Budget Variance	Against the budget the Treasurer set.
GST Reconciliation	GST Reconciliation	When registered: the GST account tied to the BAS worksheet and the Balance Sheet.



The General Ledger Summary.



The Journal Report.

Click any account in a report to open its Account Transactions for the same period. Each report checks itself (debits equal credits; net assets equal equity; the cash summary agrees with the bank balances) and shows a red warning if a check fails.

The year-end pack

Reports → Year-end pack (or **Year end → Year-end pack**) gathers every report for a financial year:

- as one printable document with a cover page — the club, the year, the date prepared, whether the year is finalised, and any balance warnings — each report on its own page. Save it as a PDF from the browser's print dialog;
- or as a ZIP holding a CSV of each report, a general ledger detail CSV for every account with activity, and the document itself.

Receipts and invoices attached to transactions are downloaded separately with **Receipts ZIP** on the Transactions page. The Treasurer can also give you the **AGM statement**: income and expenditure with a statement of assets and liabilities.

The lock date and finalised years

When the Treasurer finalises a year, the books are locked up to its last day: nothing dated on or before the lock date can be added, changed or removed, and the year's figures are kept with who finalised it and when. **Year end** shows each year's status. A finalised year can be reopened for a correction; the reopening is recorded.

> If you have year-end adjustments — depreciation, prepayments, accruals, stock — give the Treasurer the journals before the year is finalised. Ask them to reopen it if it already is.

Working in Xero

If you prefer your own tools, the books export in Xero’s import formats: the chart of accounts, each bank account’s statement pre-coded with account codes and tax rates, and the manual journals.

What to ask the Treasurer for

- Bank statements at 30 June for every account, to agree with the Balance Sheet.
- A list of anything unpaid at year end: bills received, claims approved but not paid, fees received in advance.
- The regalia stocktake and any equipment bought or sold.
- Minutes approving the budget, and any grants with conditions.
- Whether the club is registered for GST, and from when.

FOR THE THEME DESIGNER ROLE

Designing the club's website

The theme editor, templates and the stylesheet, previewing, publishing and rolling back.

The Theme designer role edits how your club's public website looks: its page templates, stylesheet and theme settings. It is made for an outside web designer: it works without the committee role and opens nothing else — no member records, no money, no emails. Changes are made in a **draft**, previewed on the real pages, and only then published.

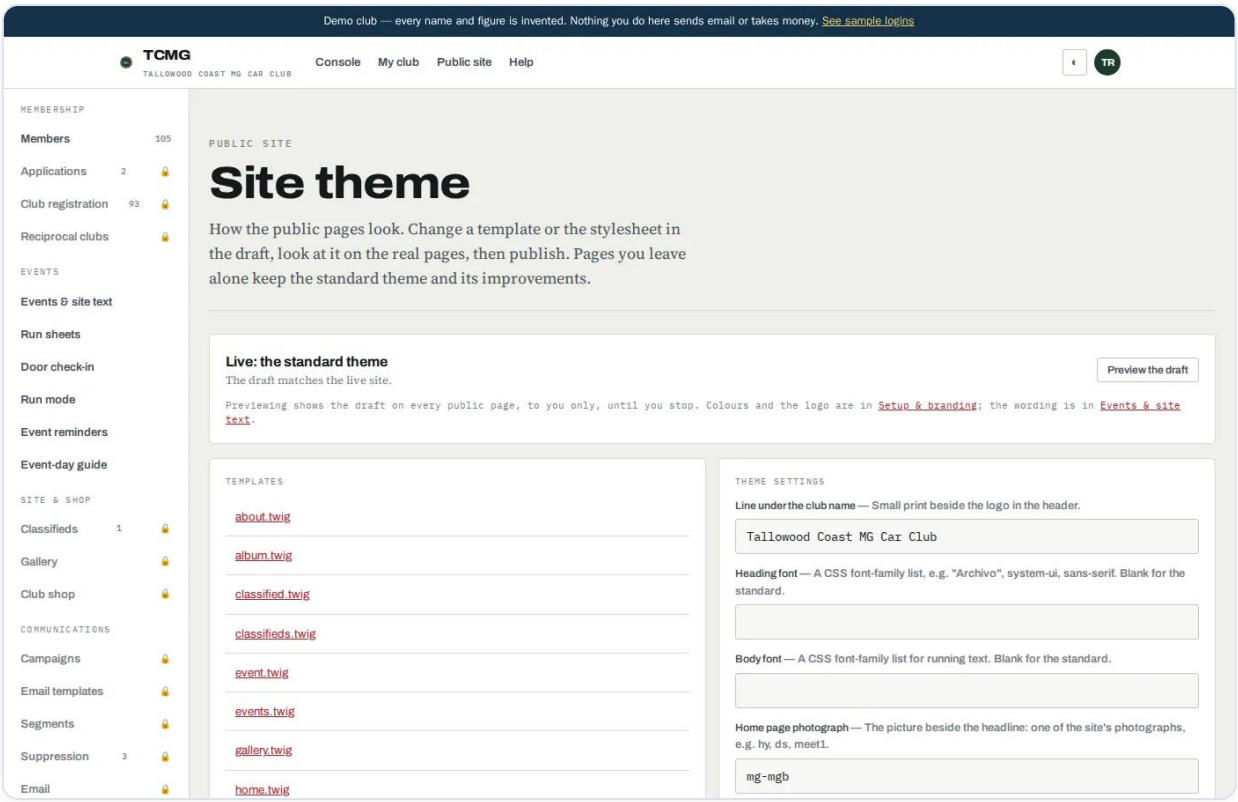
What a theme controls — and what it doesn't

Changed here, in the theme	Changed elsewhere
The layout and markup of every public page: home, events, an event, gallery, an album, classifieds, an ad, shop, a product, join, about, the magazine page, the not-found page, and the shared header, footer and cards.	**Colours and the logo** — Setup & branding, by the Club settings role.
The stylesheet, `theme.css`.	**The wording** — headlines, introductions, the notice banner — Events & site text, by any committee member.
Theme settings: the line under the club name, heading and body fonts, the home and About page photographs, and social media links.	**The console and members' pages** (My club, the card, renewals) — these follow the club's colours but aren't themed.

Pages you leave alone keep the platform's standard theme and pick up its improvements as they come.

Getting in

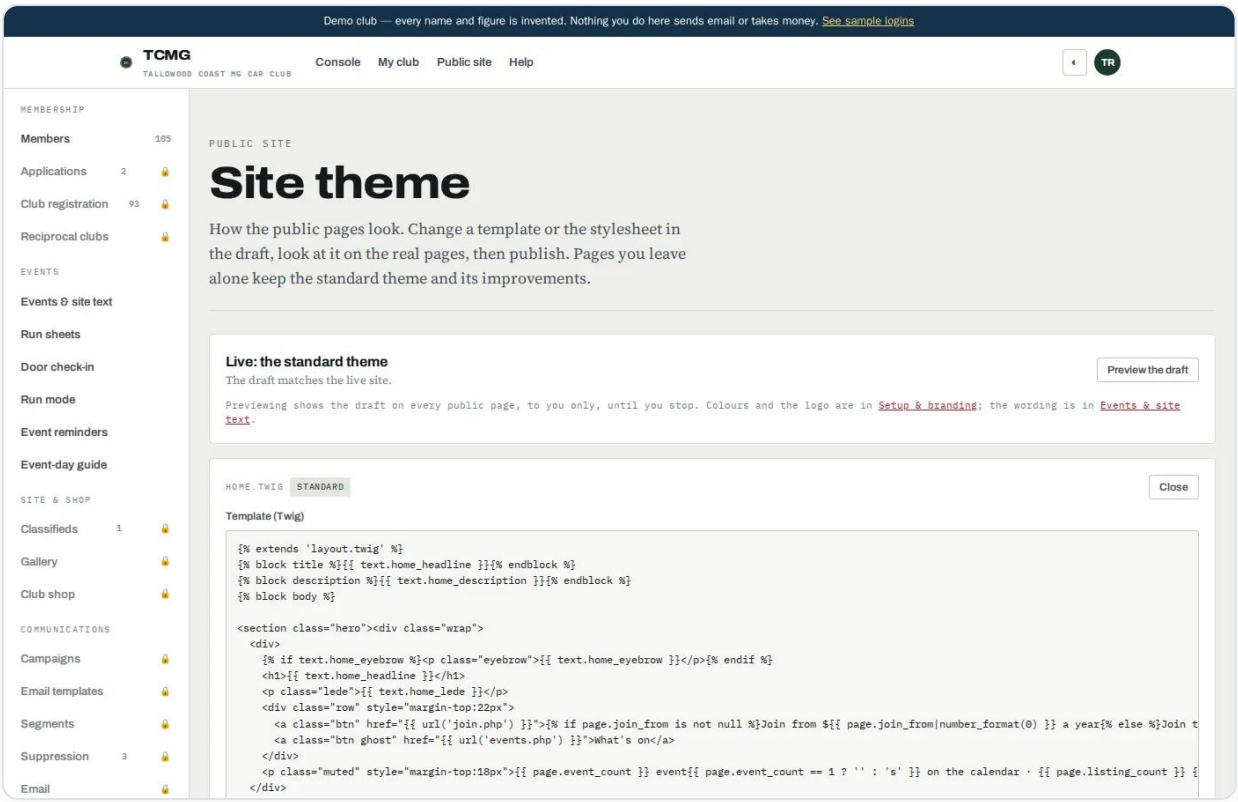
1. Someone on the committee with the Roles role adds you to the member list with your email and ticks **Theme designer**. You get an email with a link to choose a password.
2. Sign in on the club's site with **Member login**.
3. Open **Site theme** from the console menu. It is the only console page the role opens.



The Site theme page.

Editing a template

1. Click a template in the **Templates** list — for example `home.twig` or `theme.css`. It opens with the standard version as its starting point.
2. Make your changes in the editor.
3. Press **Save to draft**. The file is checked and trial-rendered first: if there's an error, the message gives the line, and nothing is saved.



Editing a template in the draft.

To add a template of your own (a partial to include from others), type its name under **New template name** and press **Add a template**. When the standard version of a template you've changed is later improved, the editor says so, so you can bring the change across.

The rules: Twig in a sandbox, no JavaScript

Templates are **Twig**, in a sandbox. You can use the usual tags — `if`, `for`, `set`, `block`, `extends`, `include`, `embed`, `macro` — and filters such as `escape`, `default`, `length`, `upper`, `date`, plus the site's helpers `url()`, `img()` and `pill()`. The editor lists everything allowed.

- **No JavaScript.** Templates may not contain `<script>`, `<iframe>`, `<object>` or `<base>` elements, `on…=` attributes or `javascript:` links, and `theme.css` may not contain `<`. Themed pages also tell the browser to run only the platform's own scripts. Interactive parts the site needs — the gallery viewer, the shop cart, RSVP forms — are provided by the platform.
- Everything printed is escaped for you; there is no way to print raw HTML from data.
- Templates can only include or extend other theme templates.

> If a published template fails when a real page is shown, visitors get the standard template instead and the error is logged; while you are previewing the draft, you see the error itself.

Previewing the draft

Press **Preview the draft**. From then on, every public page you open shows the draft — to you only — until you stop previewing. Visitors keep seeing the live site. Check each page you changed, on a phone as well as a computer.

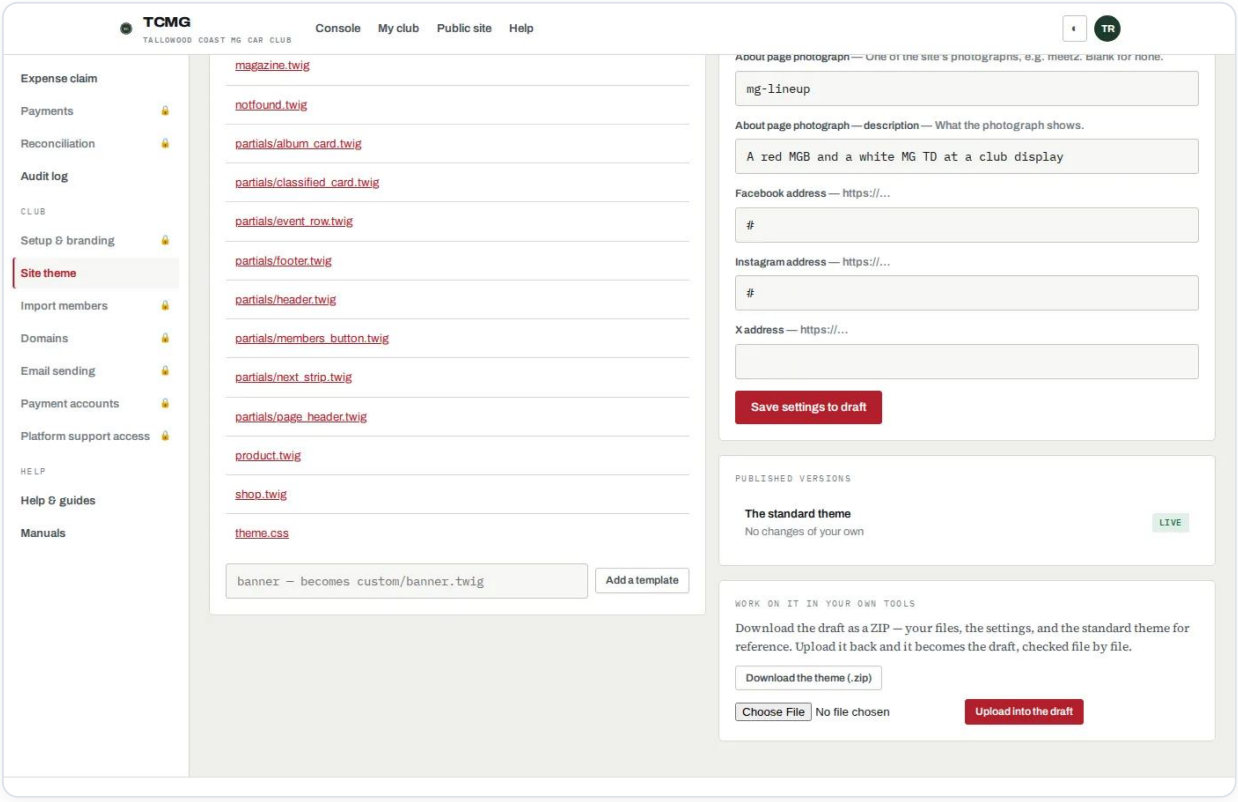
Theme settings

Under **Theme settings**: the line under the club name in the header, the heading and body fonts (a CSS font-family list; blank for the standard), the photographs beside the home page headline and on the About page (one of the site's photographs, with a description for people who can't see it), and the club's Facebook, Instagram and X addresses. Press **Save settings to draft**; they publish with the rest of the draft.

Publishing, versions and rolling back

1. When the draft is right, press **Publish**. It becomes the live site at once, as a new numbered version.
2. **Discard draft** throws away unpublished changes and starts the draft again from what is live.

Published versions lists every version with when, who and how many files it changed. **Put this back live** beside any version — including the standard theme — rolls the site back to it at once. Nothing is lost: the later versions stay in the list.



Versions, and working in your own tools.

Working in your own tools

- **Download the theme (.zip)** gives the draft: your files, the settings, and the standard theme for reference.

- Edit it in your own editor, then **Upload into the draft**. Every file is checked as if you had saved it in the editor; the upload becomes the draft, ready to preview and publish.

What the platform adds

Some things on public pages come from the platform, not the theme, and can't be removed by it: the security headers, the scripts the site needs (the gallery viewer, the cart, forms), and — on a demo site — the demo banner. Design around them.

Quick answers

If…	Then…
"Save to draft" is refused	Read the message: it gives the line. Usually a Twig error, or something the sandbox doesn't allow (a script, an inline `onclick`).
My change doesn't show on the site	It is in the draft. Preview it, then **Publish**.
A published change broke a page	**Put this back live** beside the previous version, then fix the draft.
I need to change the colours or logo	Those are the club's branding: ask whoever holds the Club settings role.

FOR EVERY CLUB MEMBER

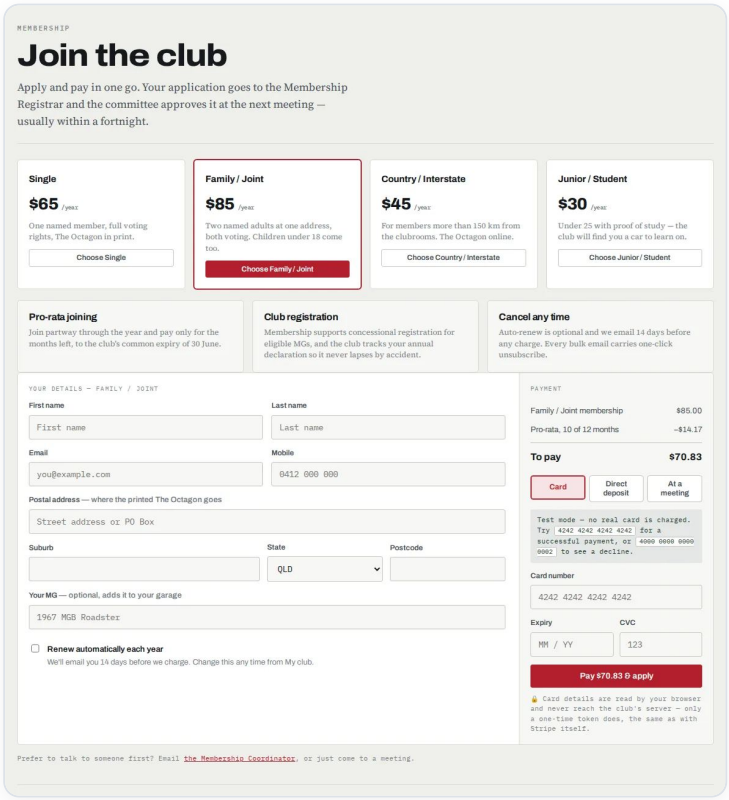
A guide for members

Joining and renewing, your digital card, events and RSVPs, your garage and club registration, classifieds, photos, and MyCars.

This guide is for members of any club on EzyClub: joining, renewing, your digital membership card, events, your cars, classifieds and photos. Everything works on a phone as well as a computer. Your club's committee can help with anything here; this guide can be printed and handed out at a meeting.

Joining

1. On the club's website, choose **Join**.
2. Pick a membership category. Each shows its yearly fee and what it includes.
3. Fill in your details: name, email, mobile and postal address. Add your car if you like; it goes straight into your garage.
4. Choose how to pay: **Card**, **Direct deposit** or **At a meeting**.
5. Press the button at the foot of the payment panel. By card, you pay and apply in one step; by direct deposit or at a meeting, you apply now and pay the way you chose.



Joining online. The fee is pro-rata when you join part-way through the year.

Every membership runs to the same date each year, so joining part-way through, you pay only for the months left. Your application goes to the committee to approve. When it is approved you get an email with a link to choose your password.

> Paying by direct deposit? The page (and an email) gives the club's bank details and a reference to use. Keep the reference exactly as shown so the Treasurer can match your payment.

Signing in

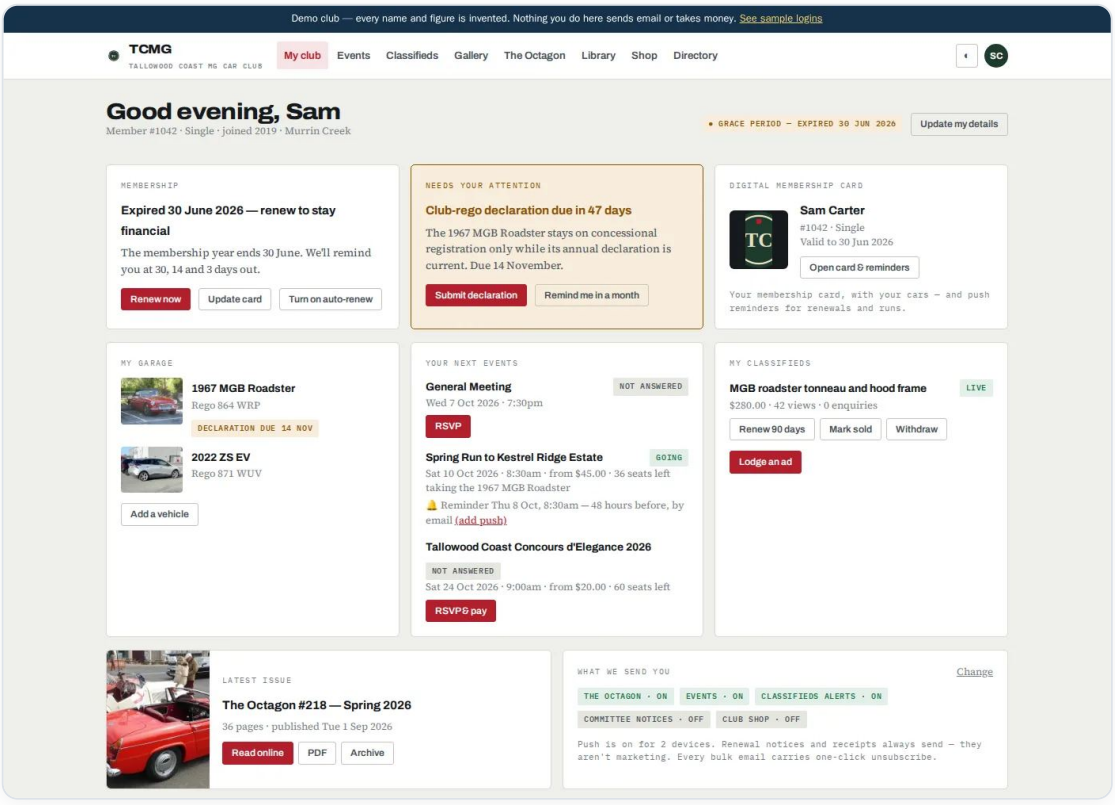
Choose **Member login** at the top of the club's website.

- **With your password**: your email and password, then **Sign in**.
- **Without a password**: choose **Email me a sign-in link**. One click in the email signs you in. This is also the way back in if you have forgotten your password; set a new one from **My details** once you are in.

After eight wrong passwords, sign-in for that address pauses for fifteen minutes.

My club

My club is your home page as a member: your membership, anything that needs your attention, your card, your garage, your next events and your classifieds.

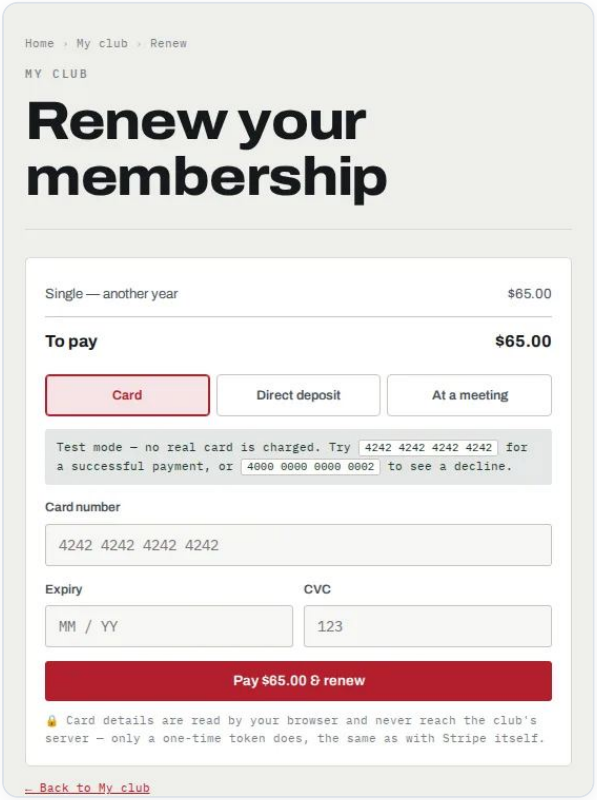


My club.

Renewing

1. Renewal opens 60 days before your membership ends. **Renew now** appears on My club.

2. Choose **Card**, **Direct deposit** or **At a meeting**, and pay.



Renewing.

- **Auto-renew**: turn it on from My club and your card is charged each year. You are emailed 14 days before any charge, and can turn it off at any time. **Update card** changes the card on file.
- **Reminders** come at 30, 14 and 3 days before your membership ends.
- **The grace period**: if you haven't renewed by the end date, you stay on in a grace period until the date the club has set, and can renew straight away. After that your membership lapses.

The club app on your phone

The club's website works as an app on your phone: an icon on your home screen that opens straight to your membership card, with Events, Club, Garage and More along the bottom. It stays signed in, so you don't type a password at the pump or the door.

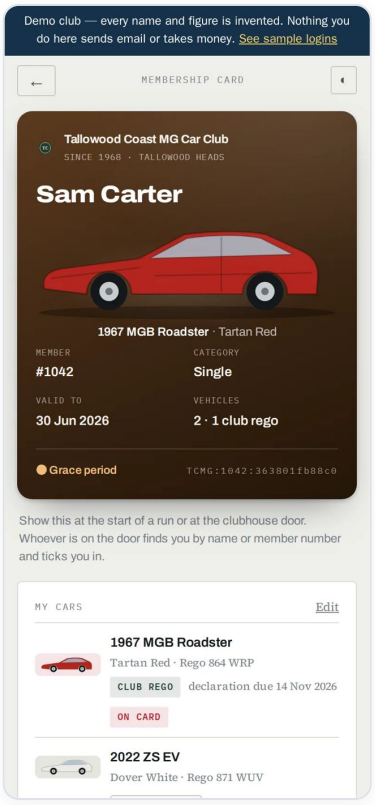
To put it on your phone:

1. On a computer where you're signed in, open **My details** and choose **Put the club app on my phone**, then **Show the QR code**. (Or ask the membership officer — they can show you one at a meeting.)
2. Point your phone's camera at the code and open the link. The code works once, for 10 minutes; your phone is now signed in.
3. Follow the steps on screen: on Android press **Install**; on an iPhone, in Safari, tap **Share** then **Add to Home Screen**.
4. Open the new icon. It signs itself in the first time.

> Lost your phone, or sold it? Open **My details** on any device, find **Devices signed in** and sign that phone out. Changing your password signs out every phone.

Your digital membership card

Membership card (from the menu under your initials, top right) shows your card: your name, a drawing of your car, your membership number, category, the date you are financial to, and your status. Show it at the start of a run or at the clubhouse door; whoever is on the door finds you by name or member number and ticks you in. Add the page to your phone's home screen to have it to hand.

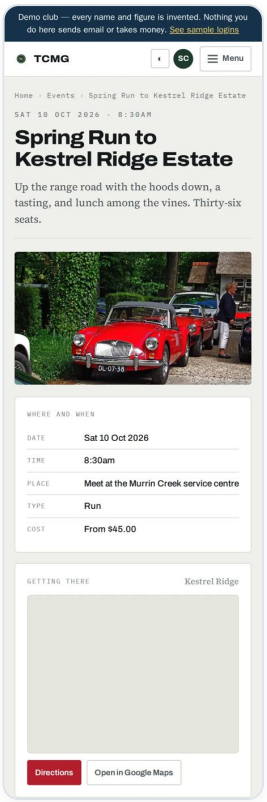


The card on a phone.

The same page turns on **phone reminders**: notifications for renewals and club runs. Press the button and allow notifications when the phone asks. Turn them off the same way.

Events and RSVPs

1. Open **Events** and choose an event.
2. Press **RSVP** (or **RSVP & pay** for a ticketed event).
3. Say how many of you are coming, which of your cars you're bringing, and any dietary needs. For ticketed events, choose how many tickets and pay.



An event and its RSVP, on a phone.

- **Full?** You can join the waitlist, and you get the place automatically if someone drops out.
- **A reminder** comes 48 hours before the event, by email and, if you've turned them on, on your phone.
- **Changed your mind?** Open the event and press **I can't make it after all**. If there is a waitlist, your place goes to the next person.
- **Your calendar**: the Events page has a link to subscribe to the club's calendar in Google, Apple or Outlook.

Club runs: sharing your location, and SOS

On some club runs the committee turns on **run mode**, so nobody gets left at a turn-off and help reaches anyone who breaks down. If you've said you're going, a red **Run live** bar appears in the app.

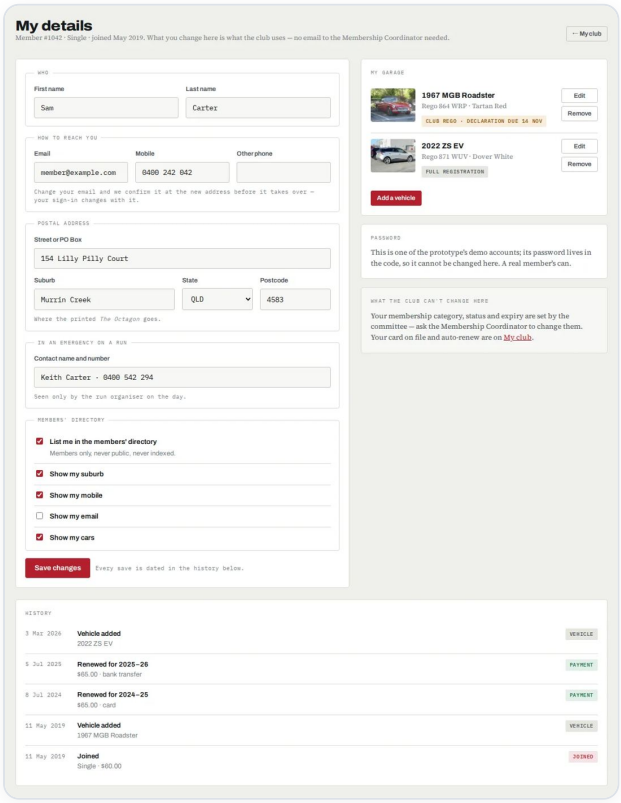
- **Sharing your location** is your choice. Tap **Share my location**: only the committee sees it, only while the run is on, and it's deleted when the run ends. **Stop** ends it at once.
- **SOS**: hold the red button for 2 seconds. It alerts the committee with your position — even if you weren't sharing — and your mobile. You'll see when someone has seen it. If you're fine after all, press **Cancel SOS**.
- In an emergency call **000** first — the button is right beside SOS, with one to call the run leader.

Your garage and club registration

Your cars live in **My details** (the menu under your initials).

1. Under your vehicles, press **Add a vehicle**: year, model, registration and colour.

2. Add photos (up to 12 a car), with captions, and choose the main one. Location details are removed from photos when they are saved.

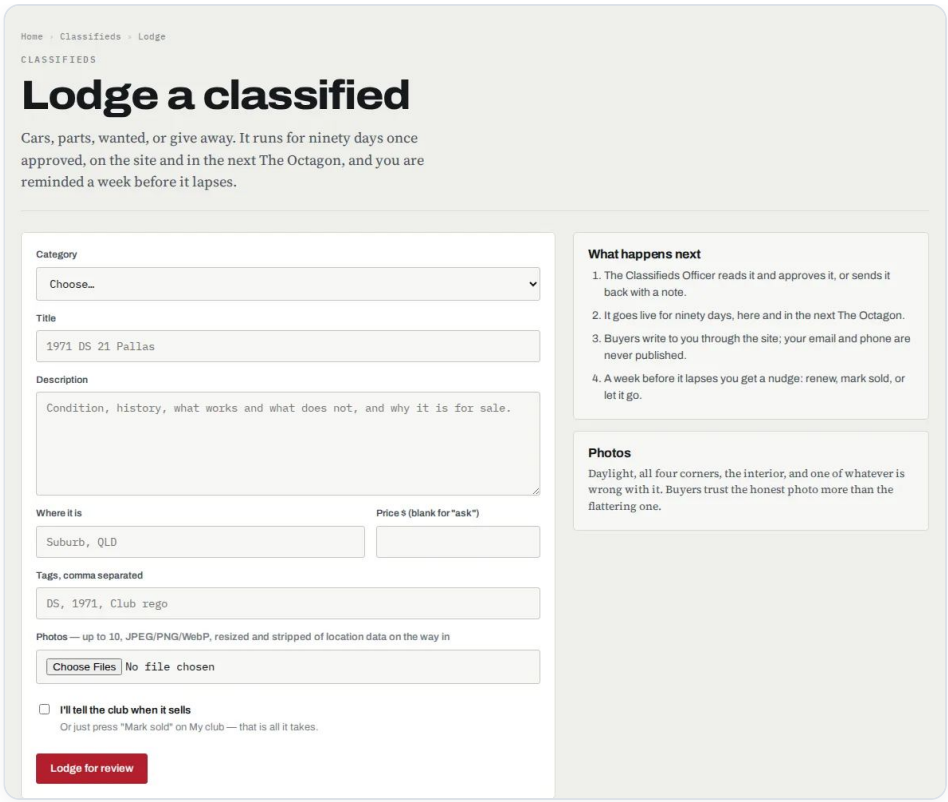


My details: your contact details, your cars and your privacy switches.

If a car is on **club (concessional) registration**, its yearly declaration shows on My club when it falls due. Press **Submit declaration**, check the details and submit. The committee then sends the confirmation the registry needs. **Remind me in a month** puts it off for a while.

Classifieds

1. Open **Classifieds** and choose **Lodge an ad** (or **Lodge an ad** on My club).
2. Choose the category, write a title and description, set the price, and add photos.
3. Submit. A moderator checks it before it goes live, and you're told if anything needs changing.



Lodging a classified.

- An ad runs for 90 days. From My club, **Renew 90 days** keeps it going, **Mark sold** closes it, and **Withdraw** takes it down.
- Buyers write to you through the club; your email address isn't shown to them until you reply.

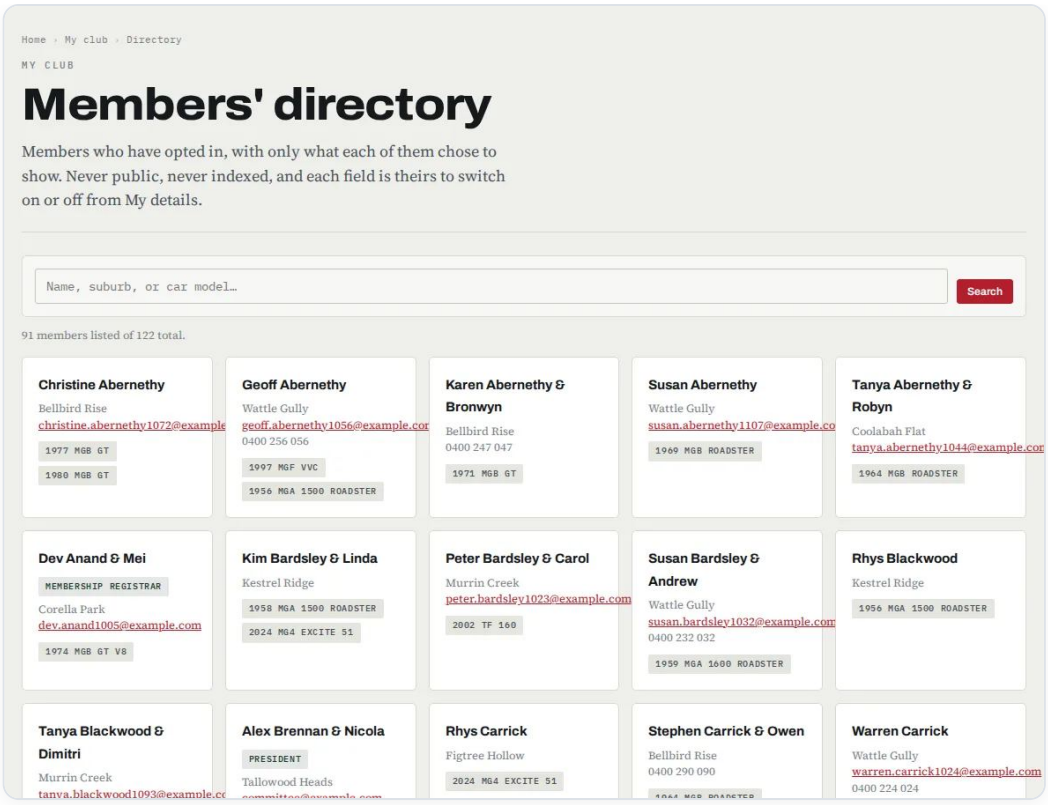
Sharing photos

Open **Gallery**, choose an album (one per past event), and press **Add your photos**. Tag the cars and people if you like. Photos are held until a moderator approves them. On a phone, you can also share photos straight from your photo app to the club, then sort them into an album from your inbox on the website.

The members' directory and your privacy

Directory lists members who have chosen to be in it. It is for members only: never public, never in search engines. In **My details** you decide:

- whether you are listed at all;
- whether your suburb, mobile, email and cars are shown.



The directory.

MyCars: your car costs

MyCars is a free companion app for tracking fuel, servicing and running costs for every car you own, with fuel economy, cost per kilometre, reminders and reports. On My club, the garage card has a **Track costs in MyCars** button: press it and your club cars come across into a MyCars account, signed in with your club login. The club never sees your MyCars records.

Keeping your details up to date

- **My details** changes your contact details, postal address, emergency contact, cars and privacy switches. Every change is dated in your record.
- Changing your email sends a confirmation to the new address; your sign-in changes once you confirm it.
- Choose which emails you get (newsletters, events, classifieds alerts and so on) from **What we send you** on My club. Every bulk email also has a one-click unsubscribe.
- Your **emergency contact** is seen only by the organiser of a club run, on the day.