EzyClub

GUIDE

Getting started with EzyClub

For the person setting up a new club

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https://ezyclub.au/guides

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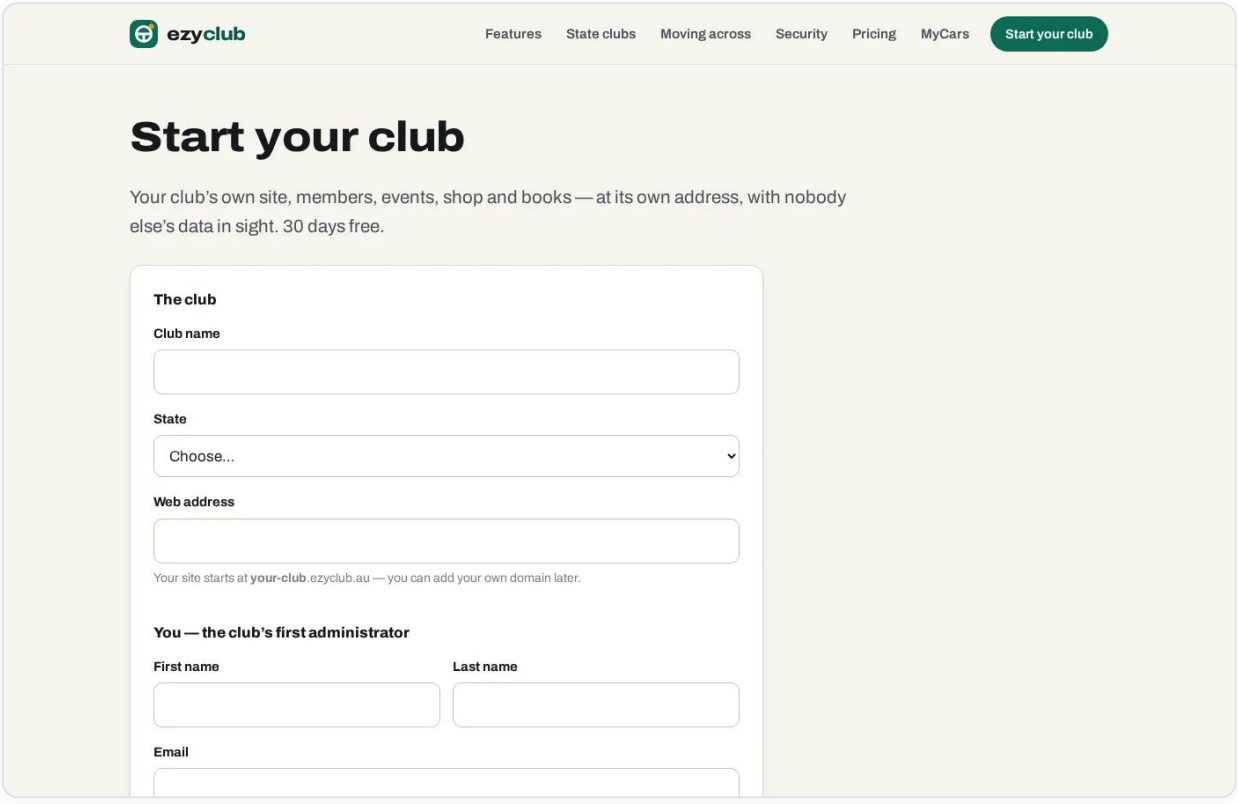
EzyClub gives your club a website at its own address, online joining and renewals, events with RSVPs and door check-in, newsletters, a club shop and the Treasurer’s books, all run by the committee. This guide takes the person setting it up from sign-up to the day members first see the site. Bringing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

Signing up

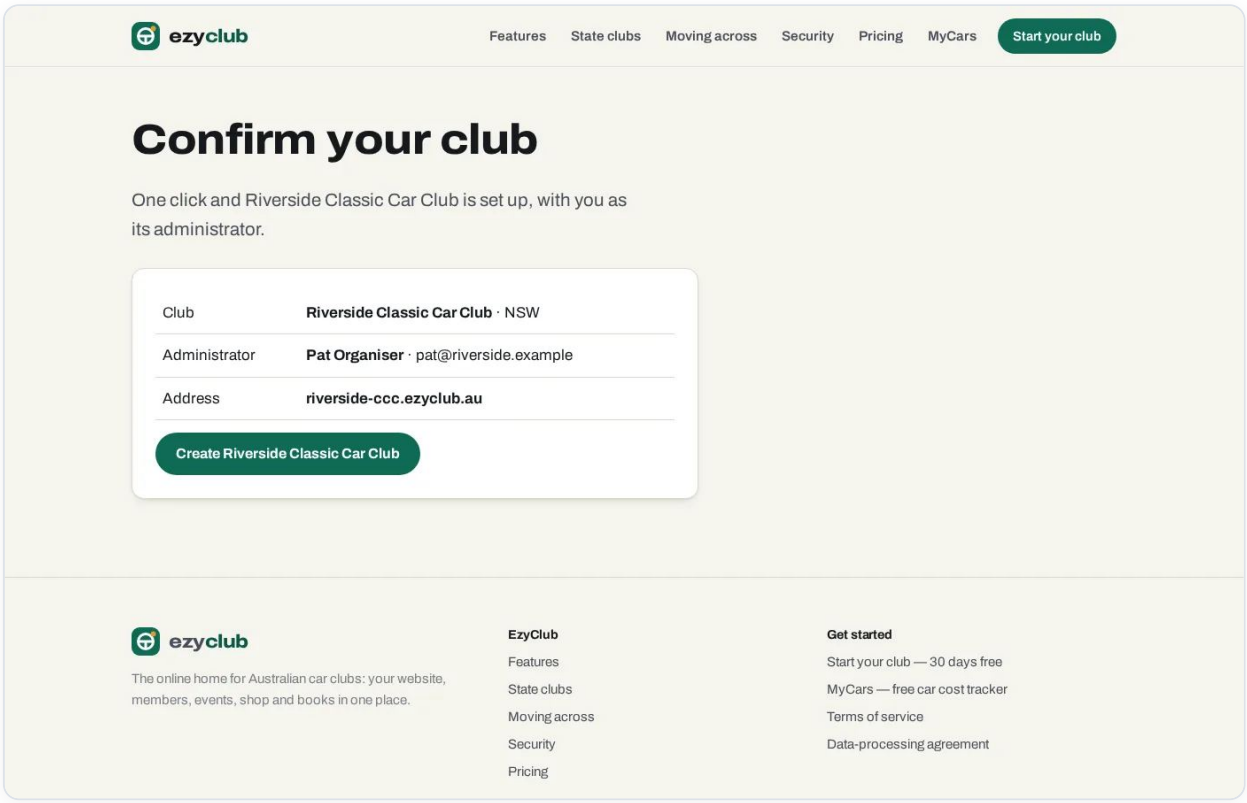
1. On the EzyClub website, press **Start your club**.
2. Enter the club’s name and choose its **web address**, the part before the platform’s domain (for example *riverside-ccc*). Lower-case letters, numbers and hyphens. The form tells you straight away if it is taken.
3. Enter your own name, email and 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.



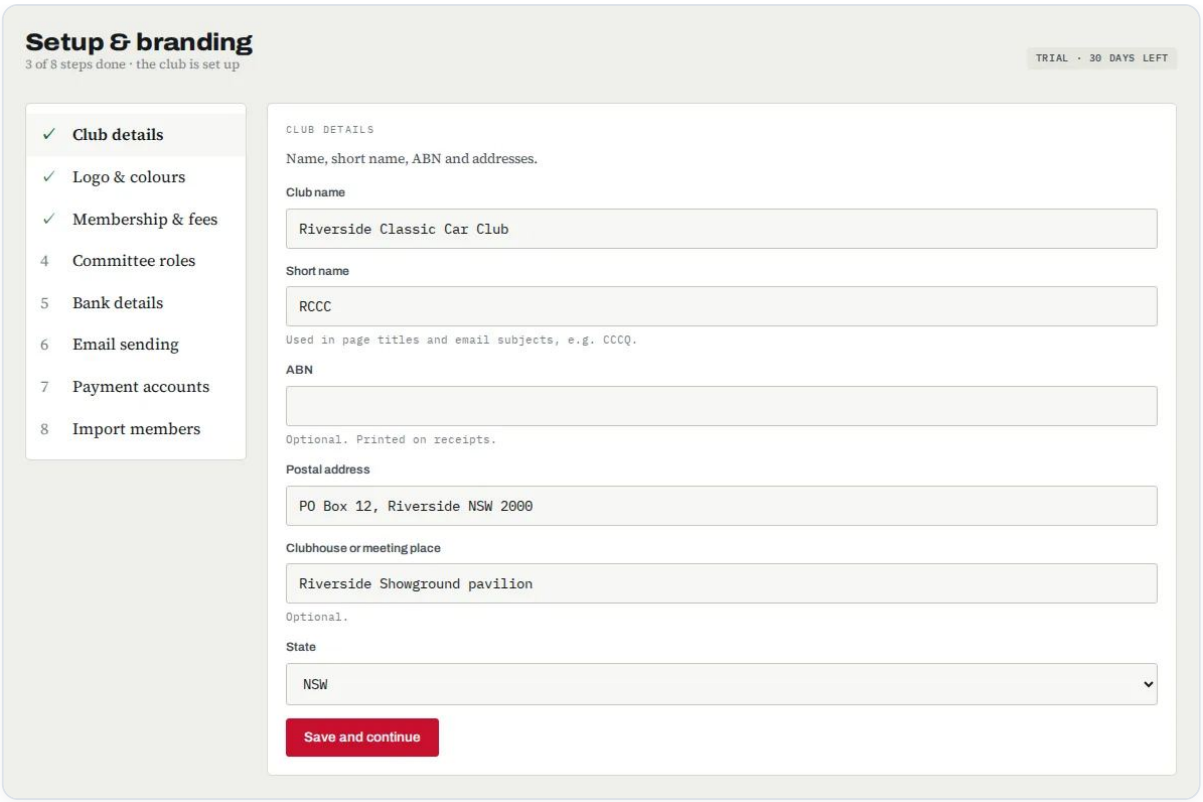
Confirming the club.

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

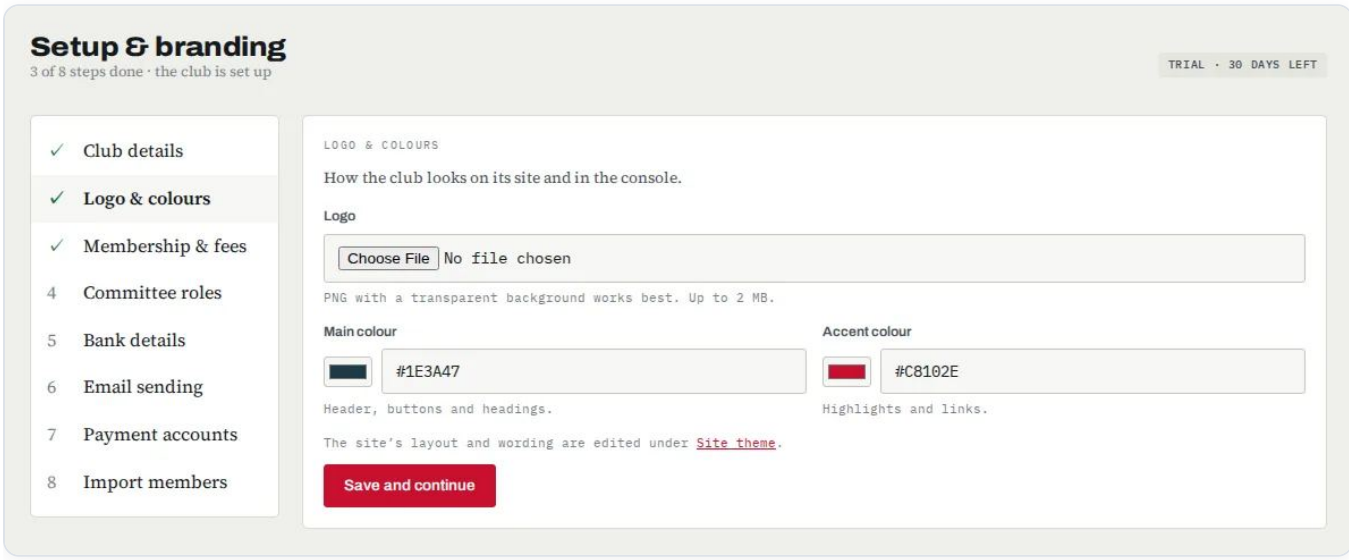
The club’s full name, a short name (used in page titles and email subjects), the ABN if it has one (printed on receipts), the postal address, the clubhouse or meeting place, and the state.



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

2 · Logo and colours

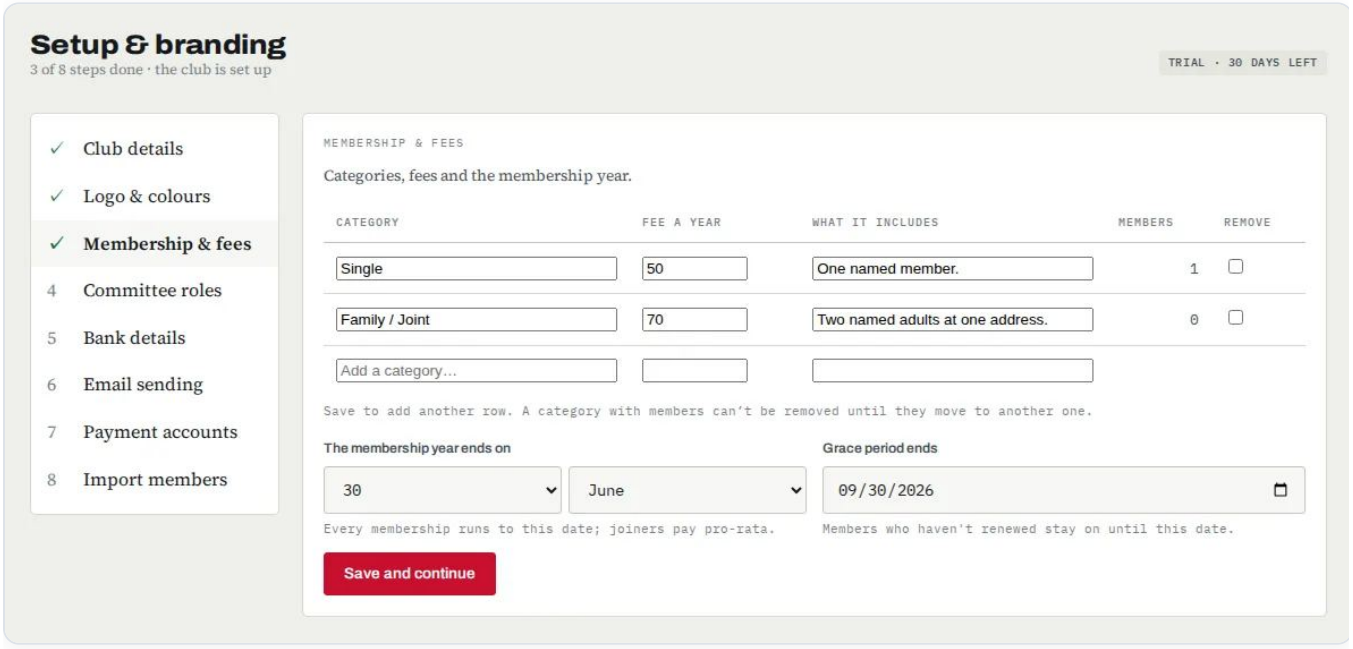
Upload the logo (PNG, JPEG or WebP up to 2 MB; a PNG with a transparent background looks best) and choose the club's colours. The layout and wording of the public site are edited separately, under **Site theme** and **Events & site text**.



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).

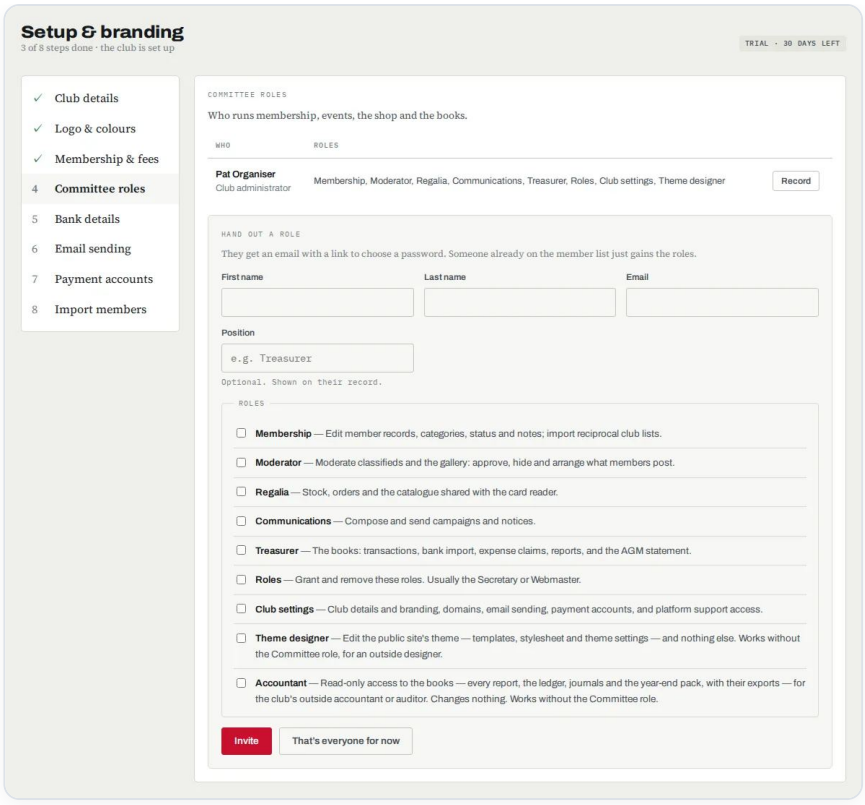


Step 3: categories, fees and the membership year.

> 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

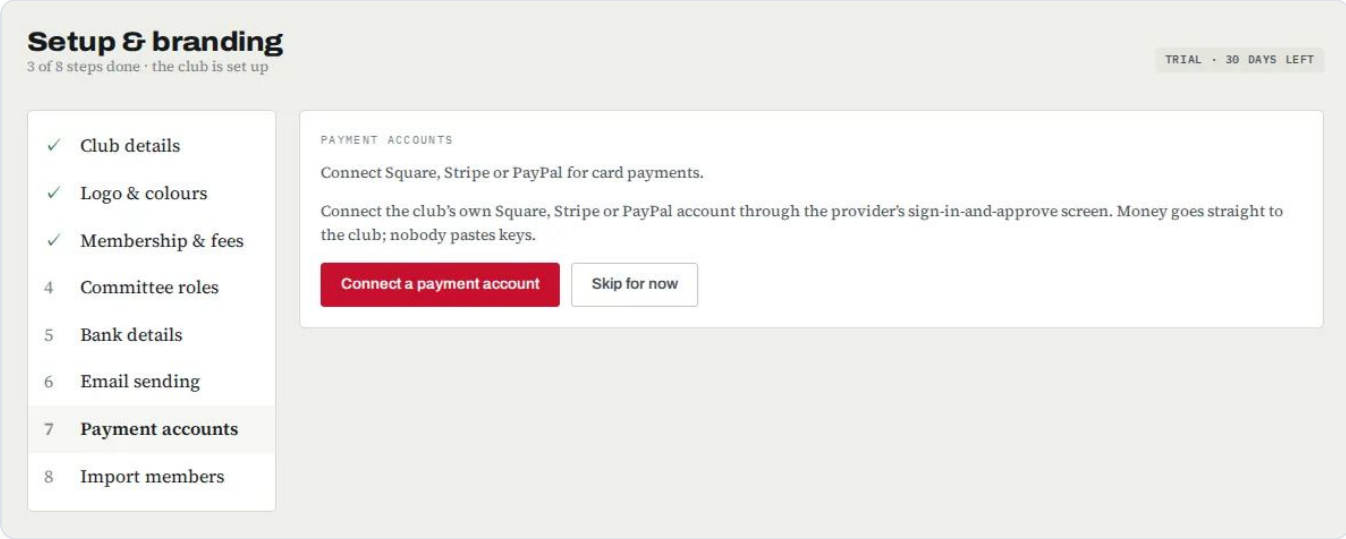
The account members pay into by direct deposit. The button opens the books' settings, which need the Treasurer role. Until it is filled in, members choosing direct deposit would see placeholder details.

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.

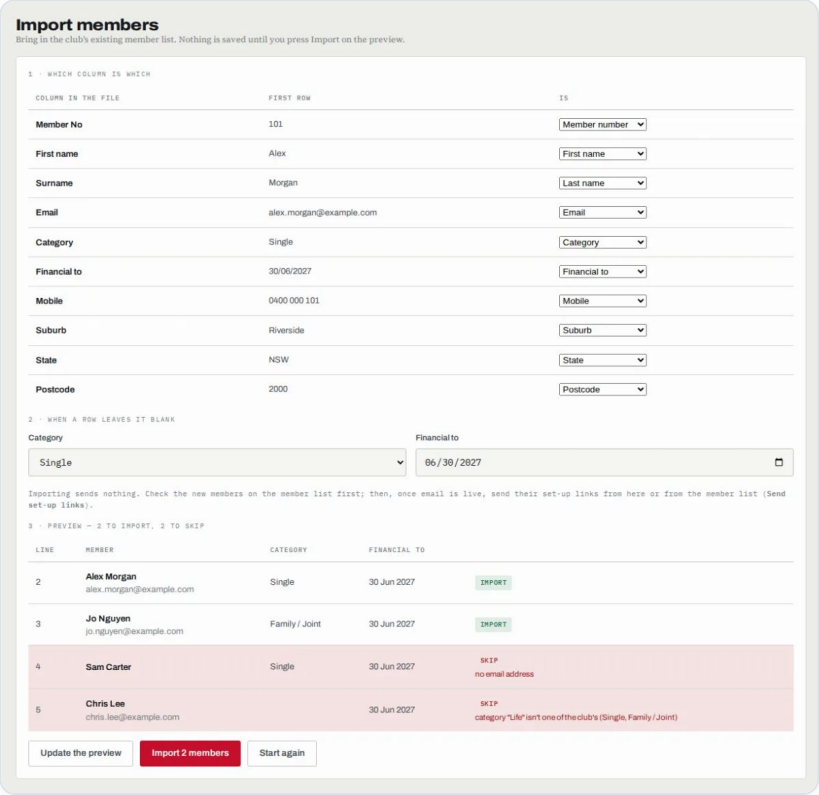


Step 7: connecting a payment account.

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.