EzyClub

GUIDE

Onboarding a club

For the platform operator and the club's lead contact

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https://ezyclub.au/guides

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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

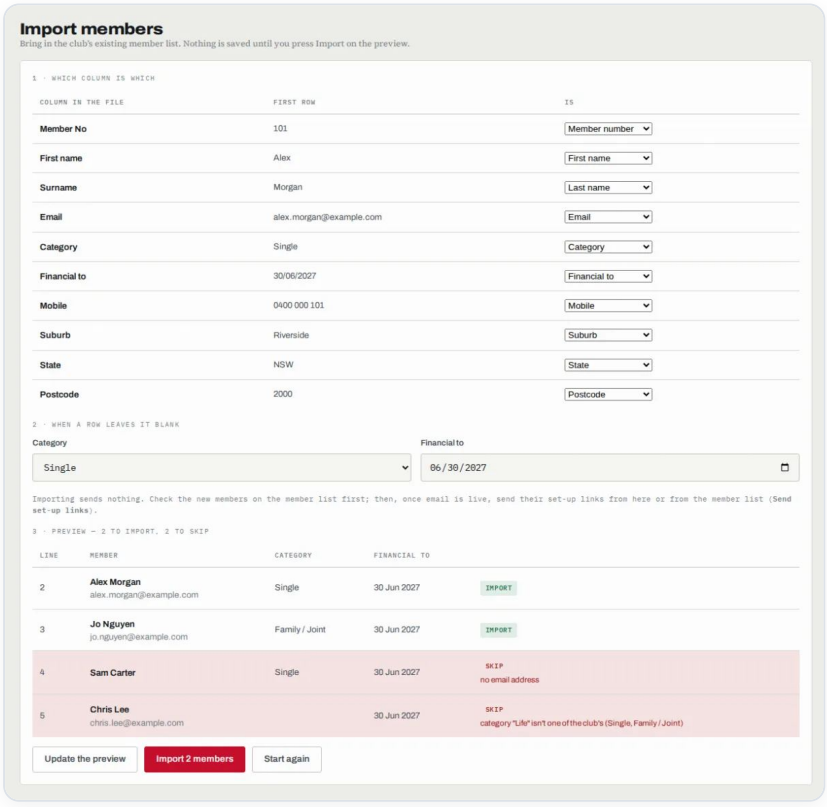
1. The lead contact signs up at EzyClub (or the operator does it with them), confirms the email, and signs in. See Getting started with EzyClub.

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).

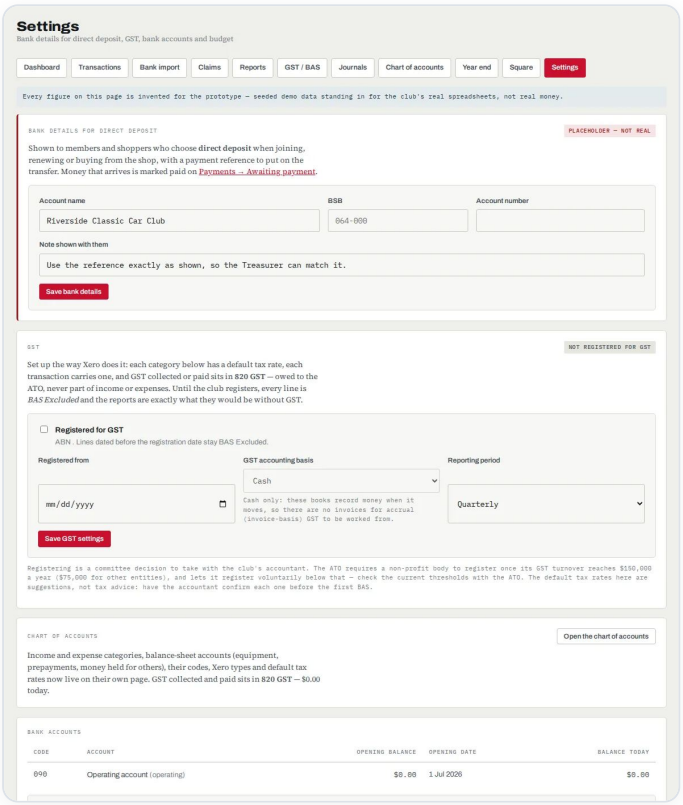


The preview. Two rows are skipped here: one has no email, the other a category the club doesn't have.

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.

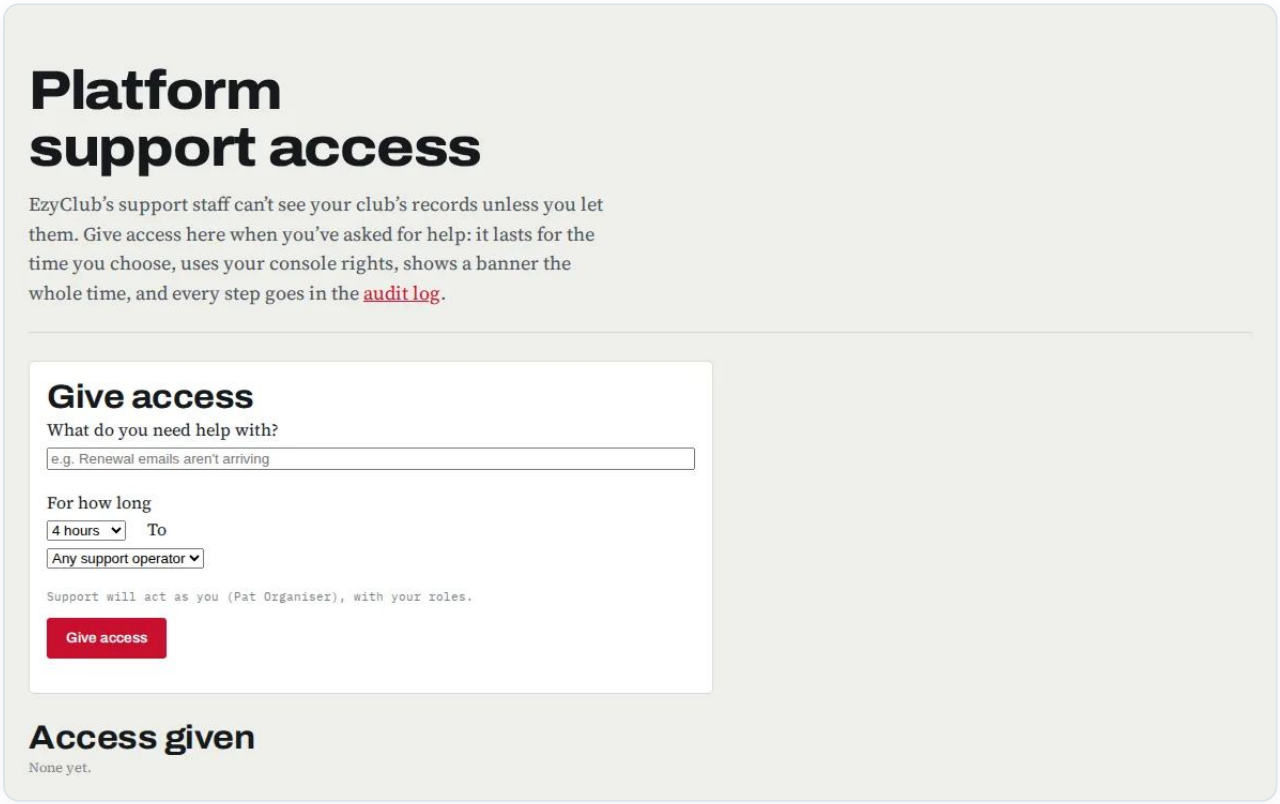
- Take away platform support access when the operator is done (it also ends by itself when its time runs out).

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.