EzyClub

GUIDE

Running the site

For the Club settings role

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https://ezyclub.au/guides

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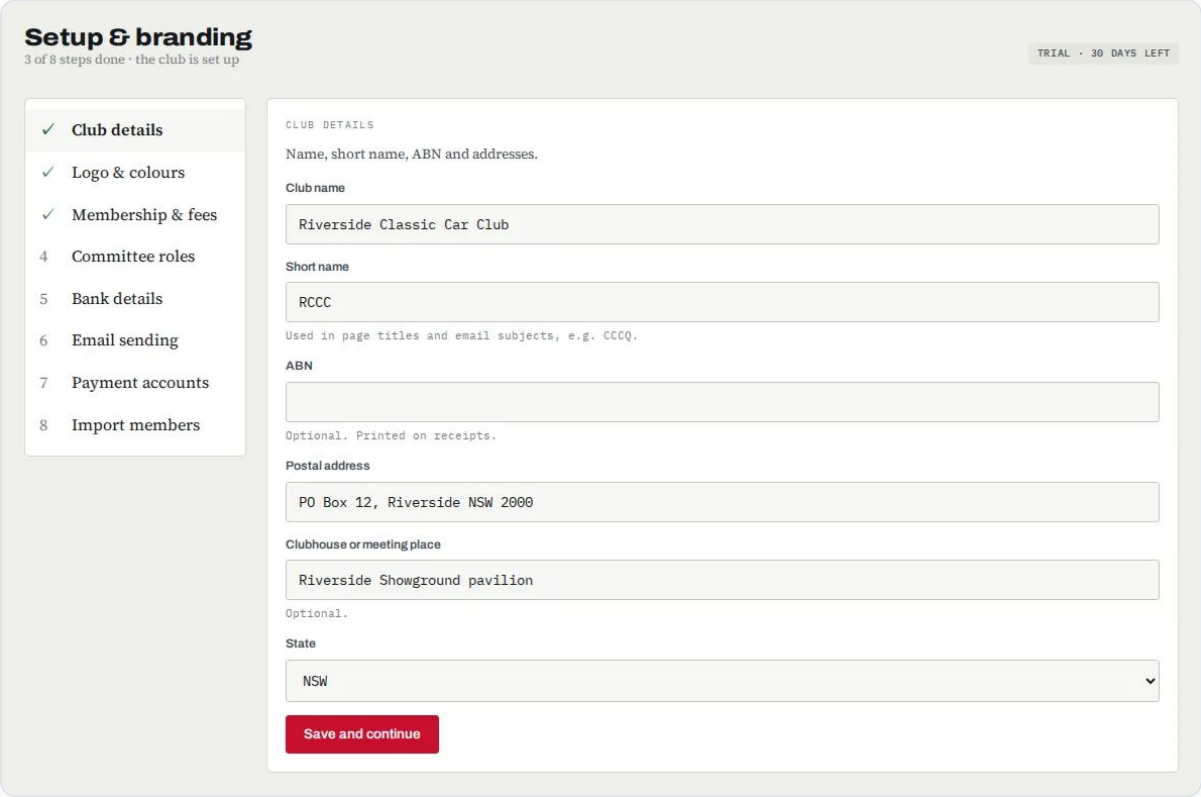
This guide is for whoever holds the **Club settings** role: usually the Secretary or the club’s webmaster. It covers the settings that reach outside the club: its details and branding, its web address, how its email is sent, its payment accounts, and letting the platform’s support staff in. All of them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

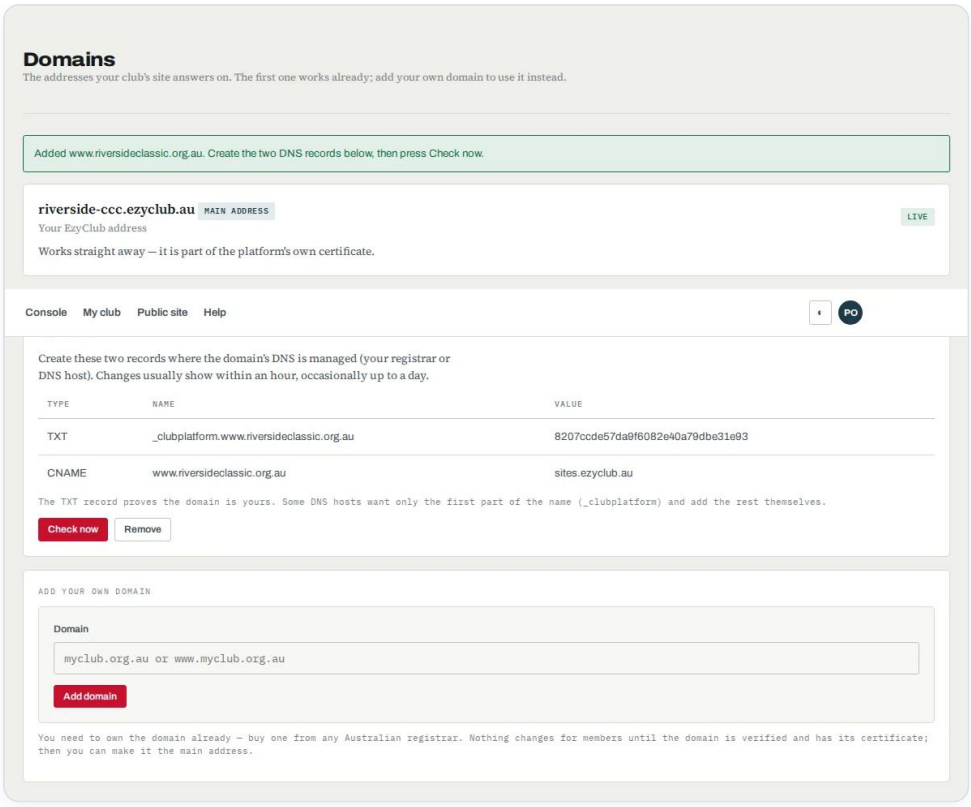


Setup & branding. The steps on the left can be opened in any order.

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.

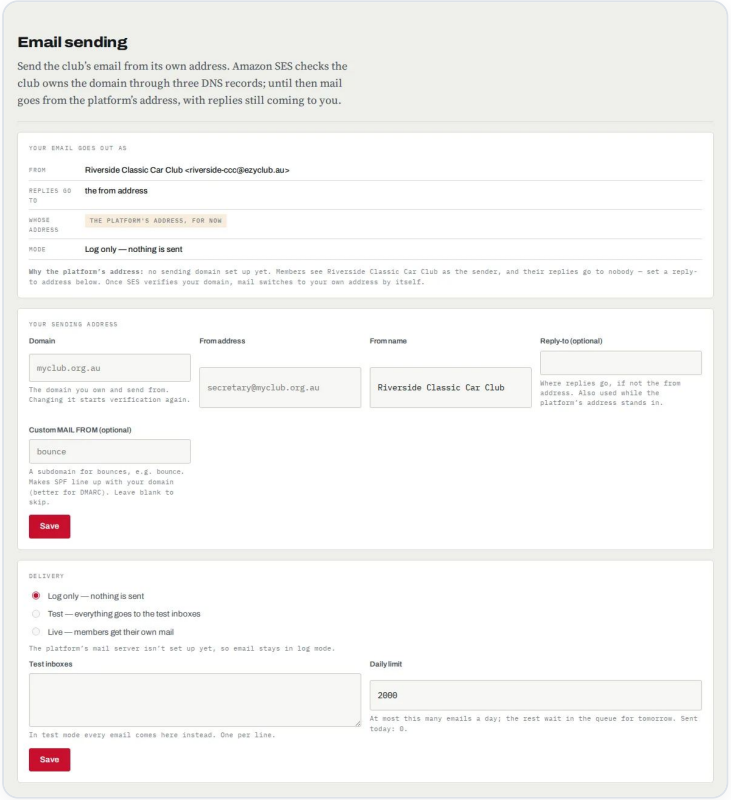
Custom MAIL FROM is optional: a subdomain such as *bounce* that makes the records line up with your domain, which helps with strict spam filters.

Test mode and live mode

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

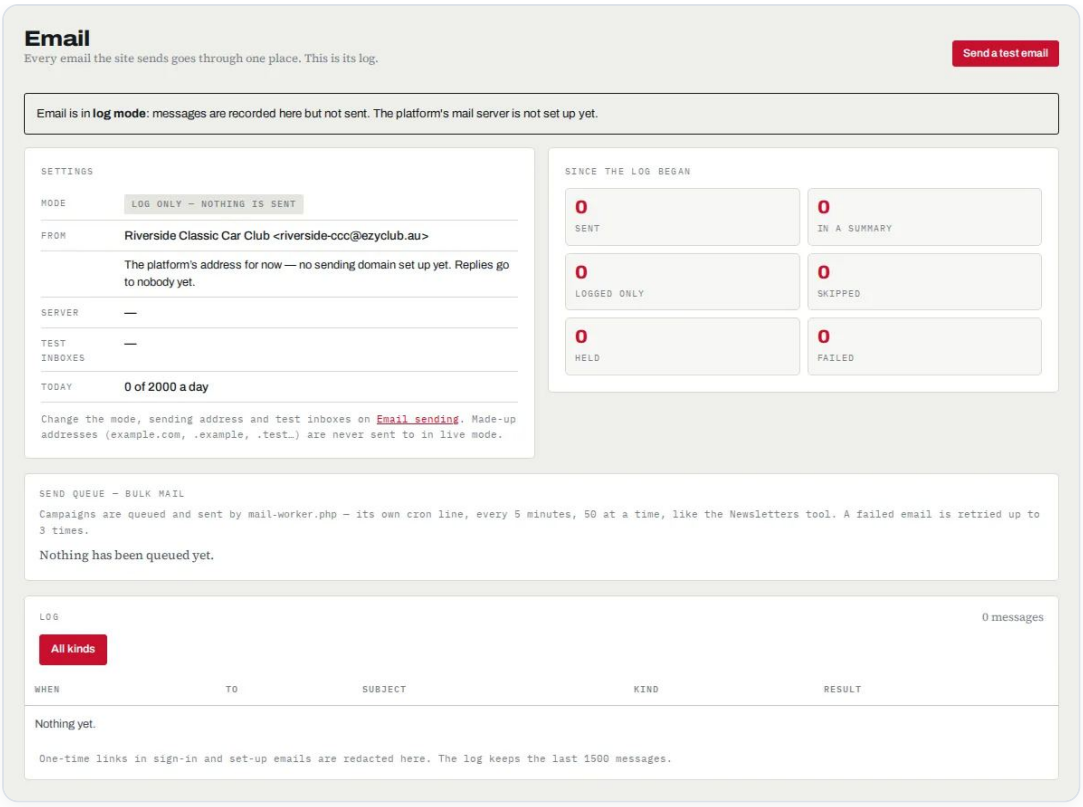
Mode	What happens
Log only	Nothing is sent. Every message is recorded on the Email page.
Test	Every message goes to the test inboxes instead, with the real recipient in the subject. Big sends send a few samples and a summary.
Live	Members get their own mail.

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.

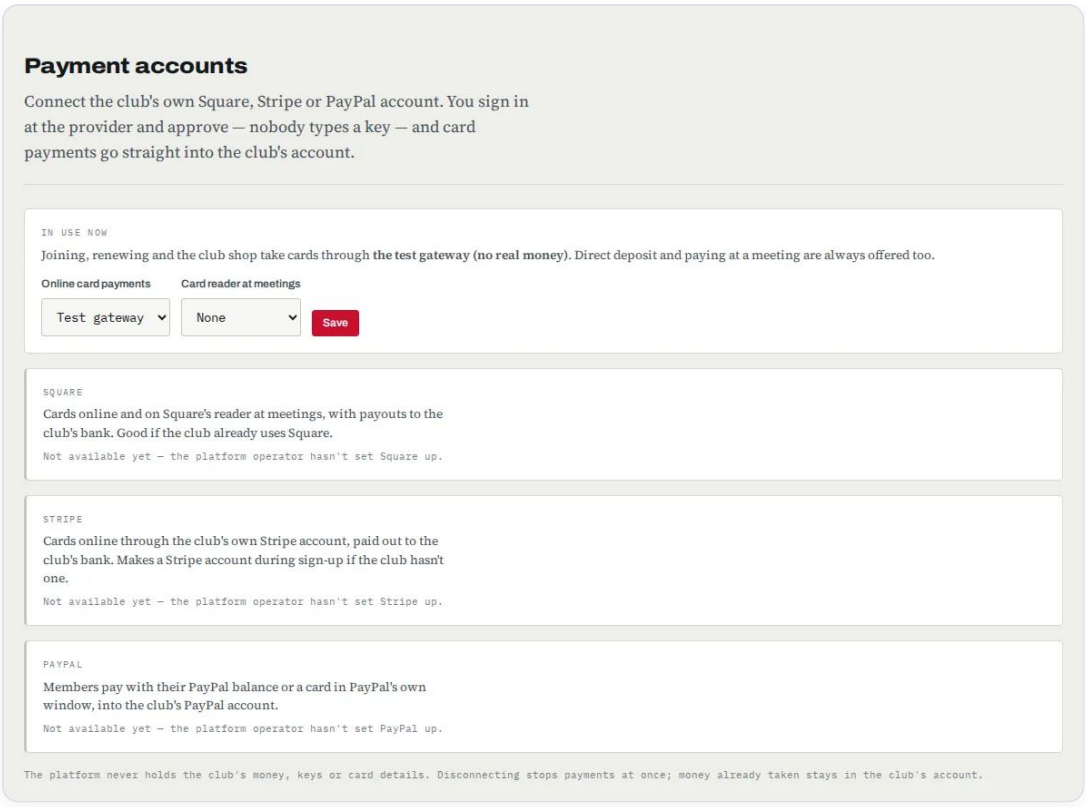


The Email page: the mode, the queue and the log.

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.



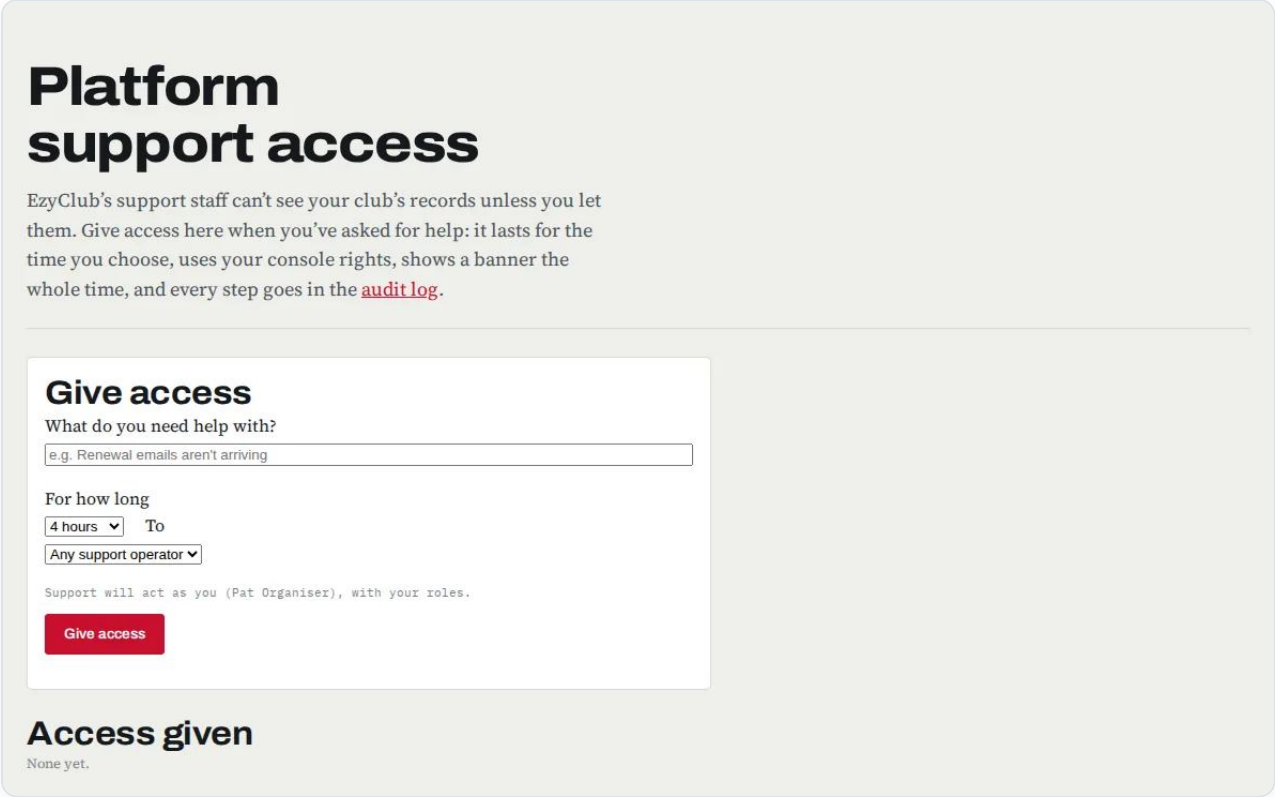
Payment accounts.

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.