How do I create a Product?

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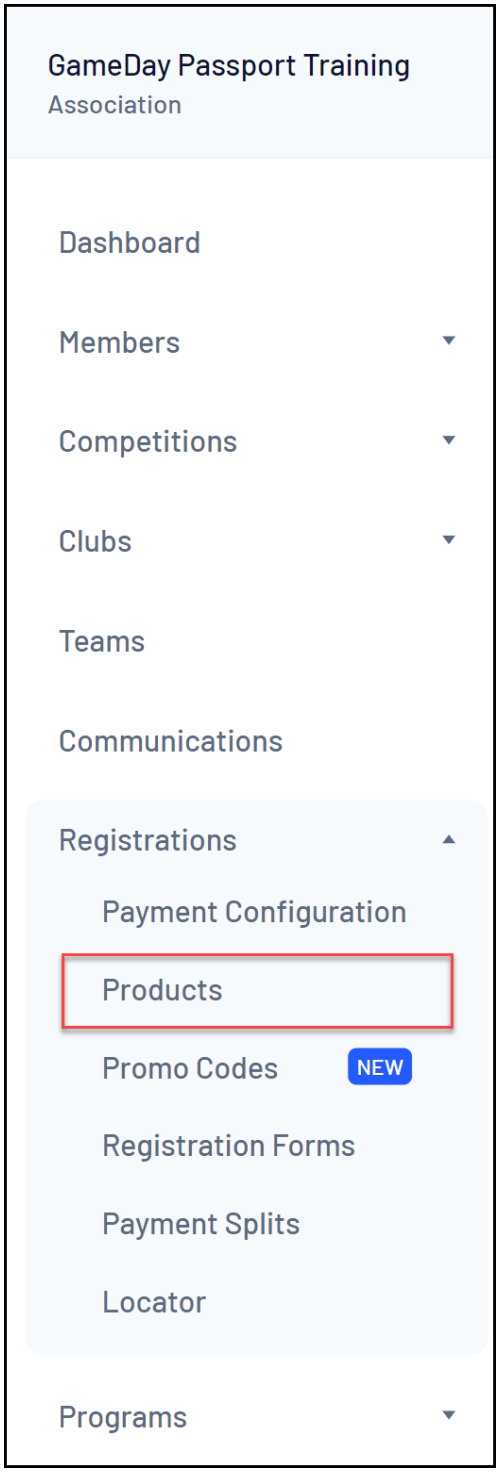
Products are fees that can be purchased by members as part of your registration process. Examples of products may include registration fees, playing gear, merchandise or event tickets.

Products can be created within your Passport database and attached to a registration form in order to display fees for purchase on that registration form

Creating a Product

To add a new product:

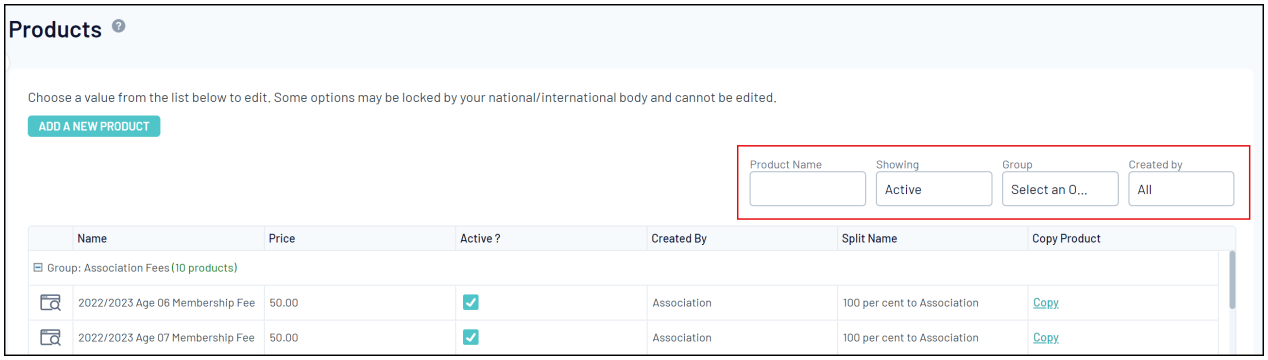
1. Select the **REGISTRATIONS** menu, then select **PRODUCTS**



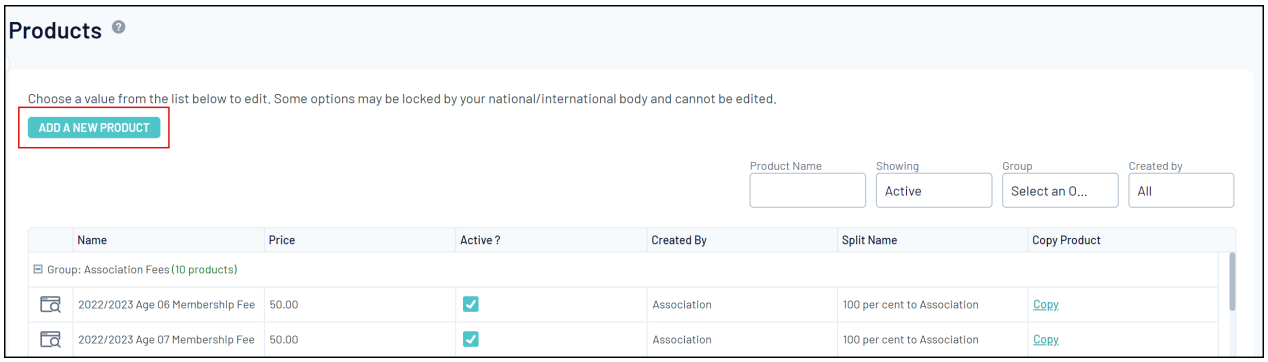
The **Products** screen lists all existing products in your database, including those that have been shared down to you from a higher level. If Products have been assigned to a group (eg. Association Fees, State Fees or Club Fees) they will appear below their group heading in the list.

The Products list can be filtered by the organisation that created the product, the Product Group or the Product Status

You can search for products typing in the **Product Name** search field

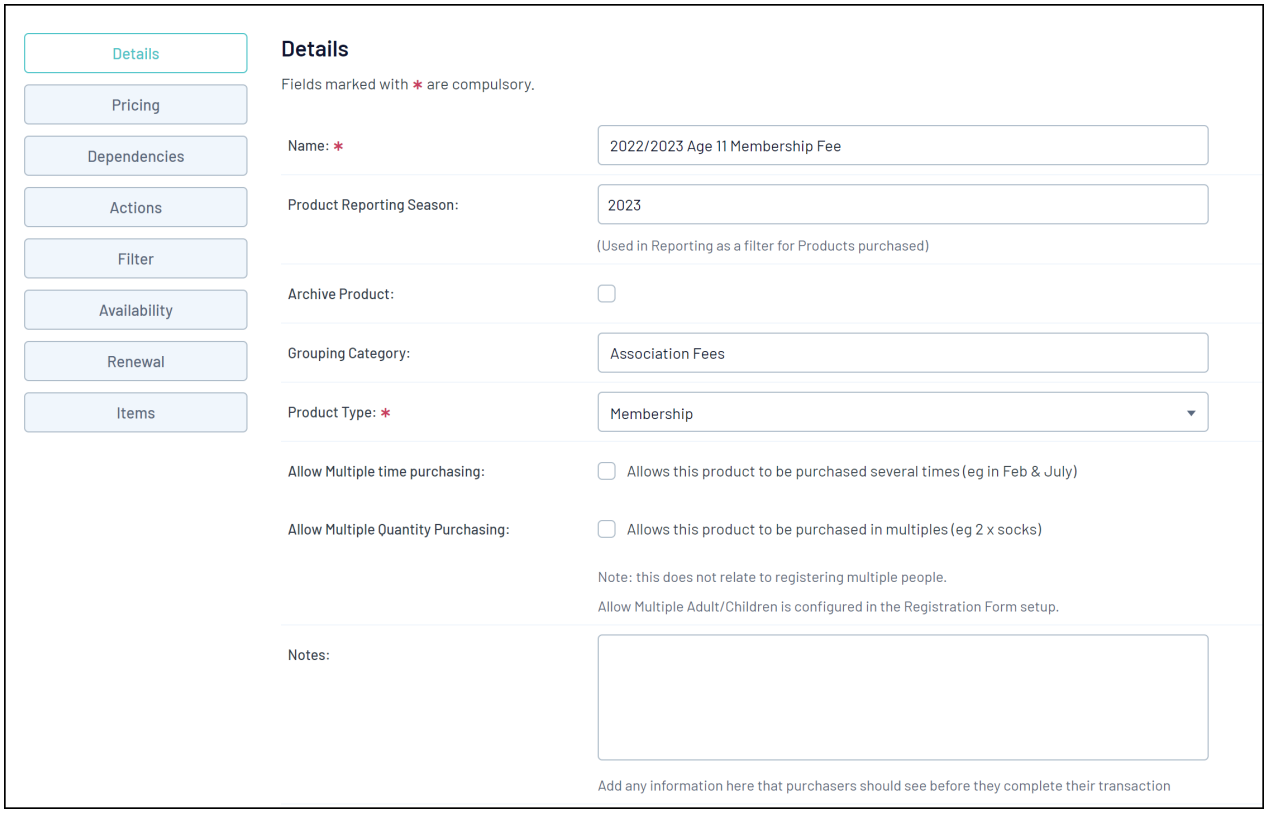


2. Click **ADD A NEW PRODUCT**



Details Tab

The first tab in the Add/Edit Products screen is **Details**.



- **Name:** This is the name of the product as will be displayed to members
- **Product Reporting Season:** The season that the product applies to. For example, if your

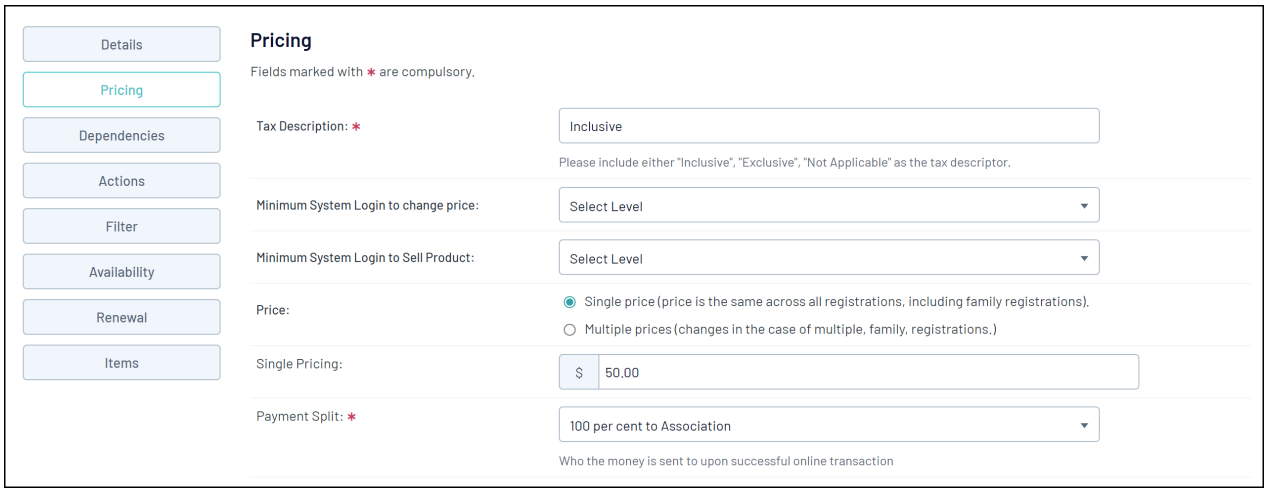
product is active for your 2023 Winter season, select this in this drop-down selection. This will assist in reporting on which products were purchased in which season.

- **Archive Product:** Ticking this box will set the product as inactive. It will still be in your database, however you will need to filter your products by ‘Inactive (Archived)’ on the Product List.
- **Grouping Category:** This will allow your products to be grouped together and display underneath this heading on your registration form and product list
- **Allow Multiple Time Purchasing:** This will allow a product to be purchased more than once. For example, a member can login to a form in March to purchase the product, then register again in June and purchase the same product
- **Allow Multiple Quantity Purchasing:** This will allow a member to purchase one or more of this product to be purchased within the same registration.

Note: This will allow you to include any additional information about the product which can be seen by members when the product is attached to a registration form.

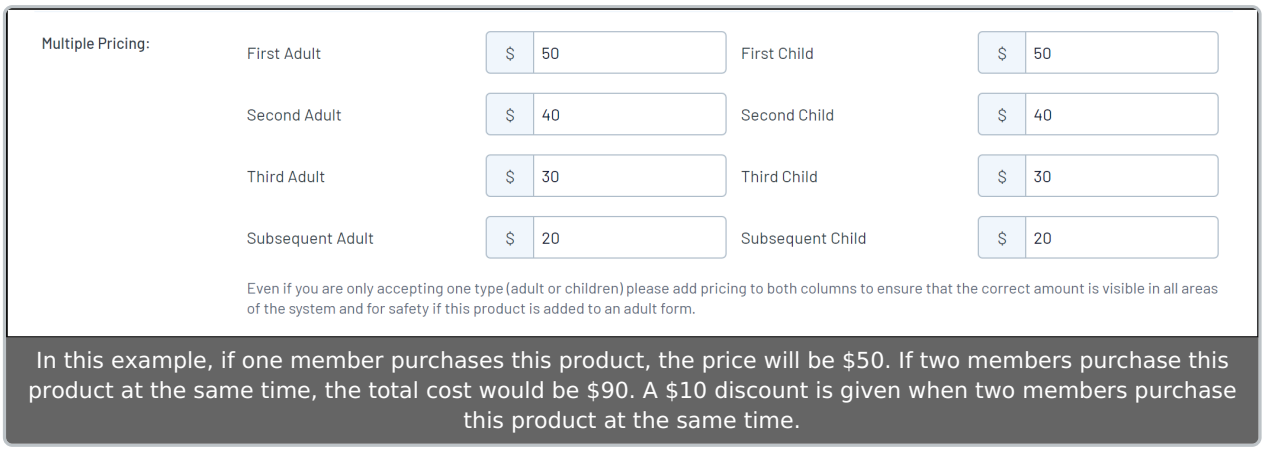
Pricing Tab

The second tab on the Add/Edit Product screen is **Pricing**. This is where you can set up the payment structure of your products.



- **Tax Description:** Appears next to the amount that members have paid on the payment receipt email that they receive after registering**.** For example, if you are in Australia, the tax type is GST. If you have entered your tax description as Inclusive, it will display as $0.00 GST Inclusive.
- **Minimum System Login to change price:** The level in your sport's hierarchy at which the price of the product can be changed. If for example an association sets up a product and sets this option to **Association**, the organisations setup under the association in the hierarchy won’t be able to change the price of the product.

- **Minimum System Login to sell product:** The minimum level at which a product can be added to registration forms.
- **Price:** Select whether the product is a single price or multi-price (discount for multiple registrations)
    - **Single Pricing:** Price of the product if single pricing is selected
    - **Multiple Pricing:** Allows you to create a multiple pricing system, so that the first adult or child's price can differ from that of the second, third or subsequent member registered as part of the same registration session. In the below example, if one member purchases this product, the price will be $50. If two members purchase this product at the same time, the total cost would be $90. A $10 discount is given when two members purchase this product at the same time.



In this example, if one member purchases this product, the price will be $50. If two members purchase this product at the same time, the total cost would be $90. A $10 discount is given when two members purchase this product at the same time.

- **Payment Split**: Determines which bank account the funds for this product will be paid, based on the account added to Passport at each level. For example, selecting 100% to Club will mean all incoming funds for this product are distributed to the bank account added within the club database.

Note: Click here for more information on adding bank accounts to Passport.

Dependencies Tab

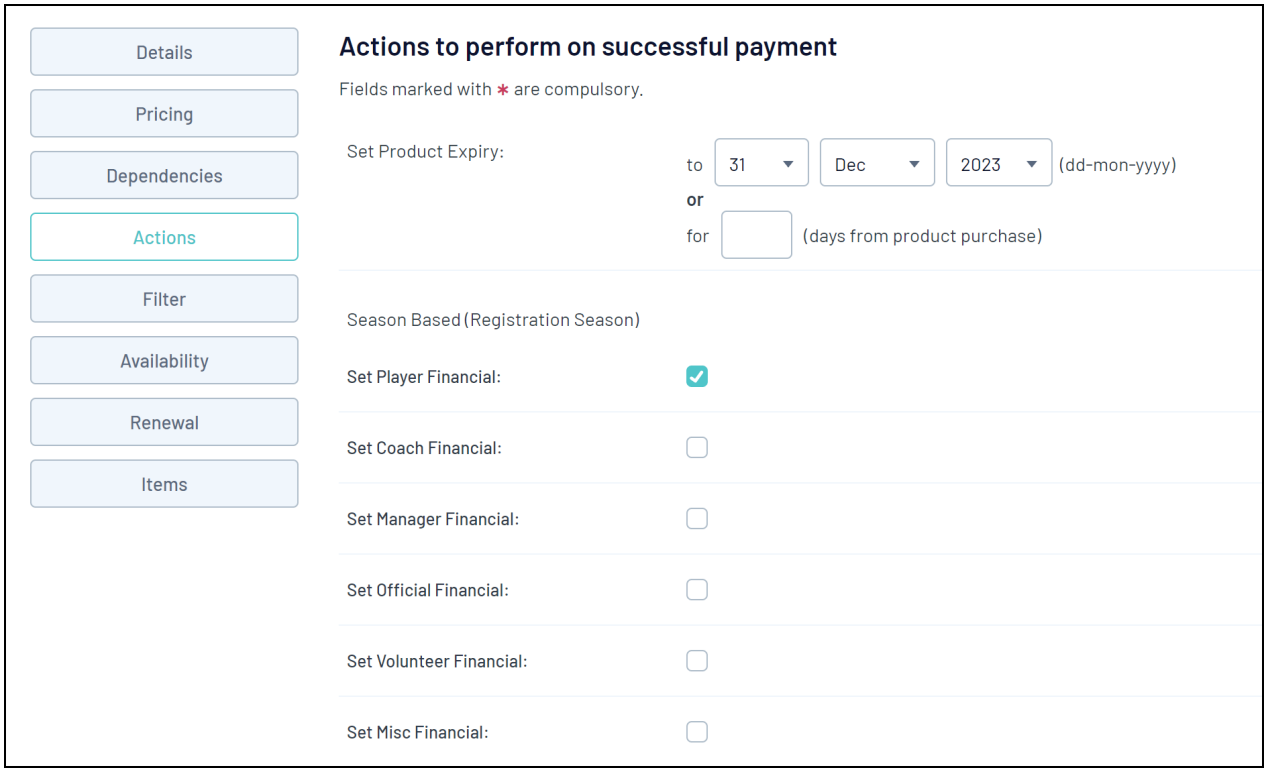
The third tab is **Dependencies**

- **Mandatory Products:** Products that are selected here will need to previously have been purchased by a member before the new product can be purchased by that member.

Actions Tab

The fourth tab in the Add/Edit Products screen is **Actions**.

This menu will allow you to configure how a membership will display on a member's profile after they have purchased the product.



- **Set Product Expiry:** This sets a date for the product status to become inactive on the member's record.
- **Set Player Financial:** Tick this box if the member's player status should be **Financial** for the season after purchasing this product.
- **Set Coach Financial:** Tick this box if the member's coach status should be **Financial** for the

season after purchasing this product.

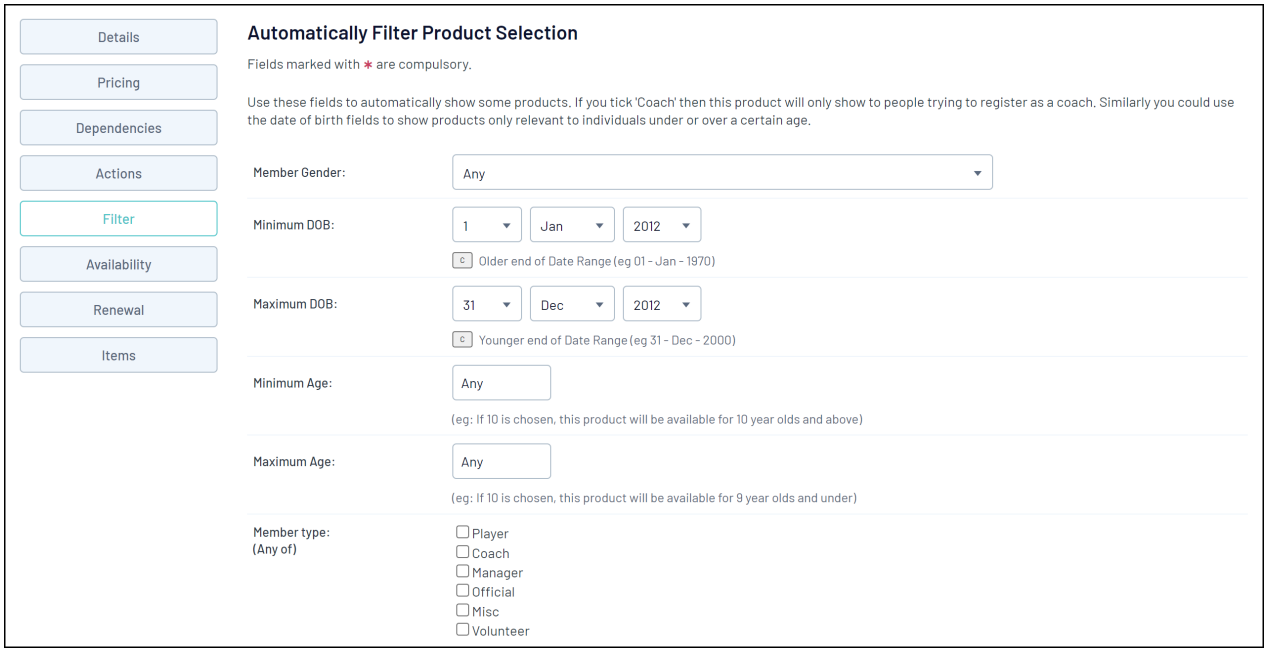
- **Set Match Official Financial:** Tick this box if the member's match official status should be **Financial** for the season after purchasing this product.
- **Set Member Registered Until:** Set a date, or number of days from registration that the member will be registered for.

> **Note**: the **Set Member Registered Until** field needs to be added for all products if your organisation is using the Courtside App for members to show as registered in the app.

Filter Tab

The fifth tab in the Add/Edit Product screen is **Filter**.

This allows you select who the product displays to based on the information provided by the member during the first page of the registration form.



- **Member Gender:** Select the gender to which the product will display
- **Minimum/Maximum Date of Birth:** Add a date of birth range to display the product only to members whose date of birth is within that range
- **Minimum/Maximum Age:** Add an age range to display the product only to members registering within that age range at the time of registration

> **Note:** Do not add a selection for both Maximum/Minimum DOB and Maximum/Minimum Age, as this will cause the product to not display on the registration form. Select either DOB or Age.

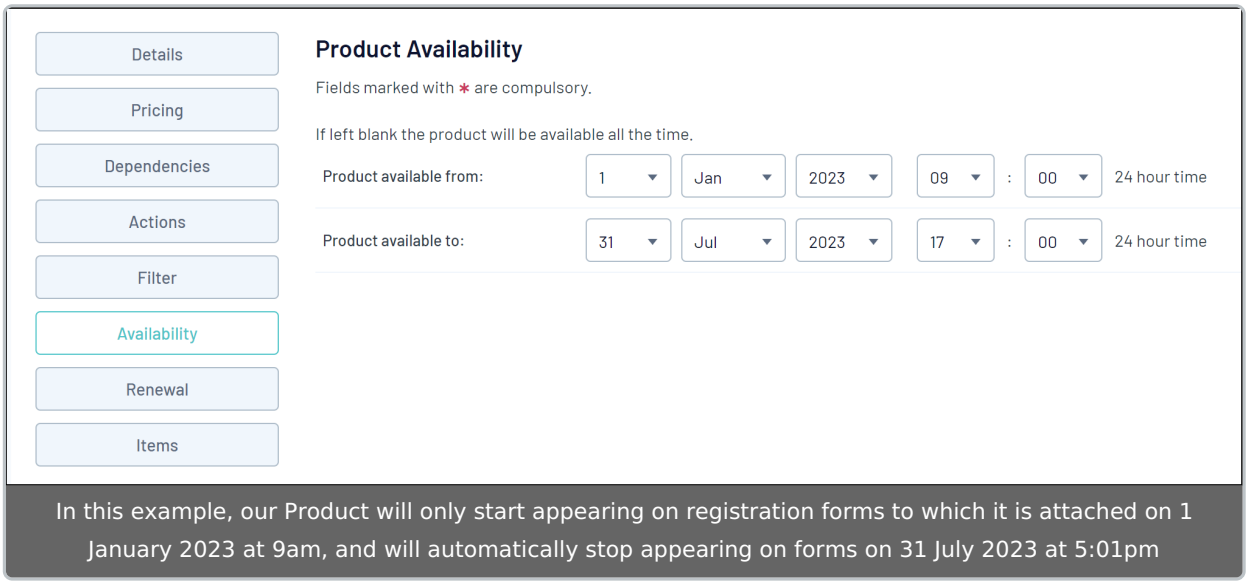
- **Member Type (any of):** If you'd like your products to only be available to a specific Member

Type, tick the relevant boxes. This relies on your members selecting the relevant option on the first page of the registration form. If the product should display to all member types, do not select any boxes.

Note: Product Filtering is best used alongside Compulsory Payments

Availability Tab

The sixth tab on the Add/Edit Products screen is **Availability**.

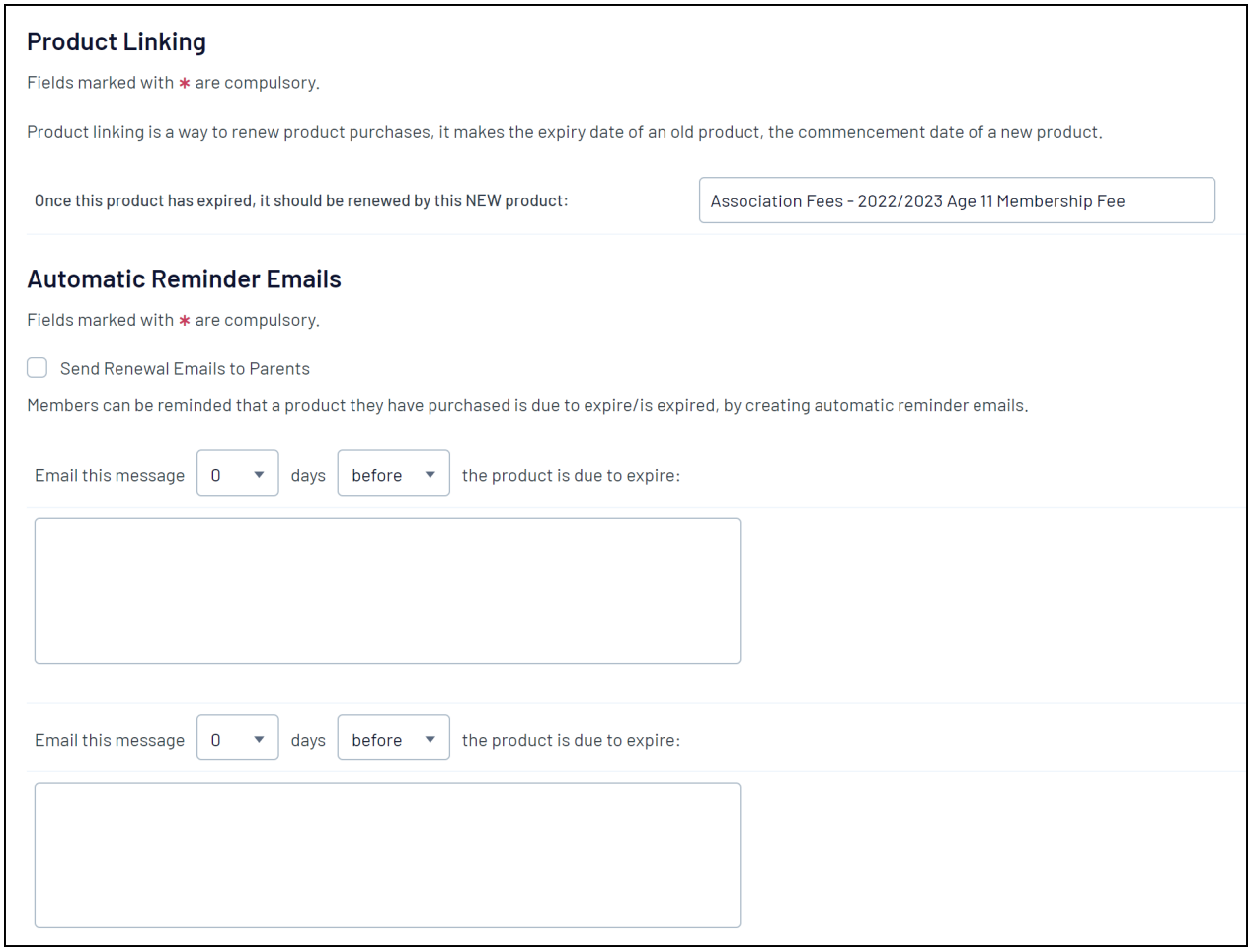


In this example, our Product will only start appearing on registration forms to which it is attached on 1 January 2023 at 9am, and will automatically stop appearing on forms on 31 July 2023 at 5:01pm

- **Product Available From/To Dates**: Allows you to display the product on registration forms for the selected period of time.

Renewal Tab

The seventh tab on the Add/Edit Products screen is **Renewal**.



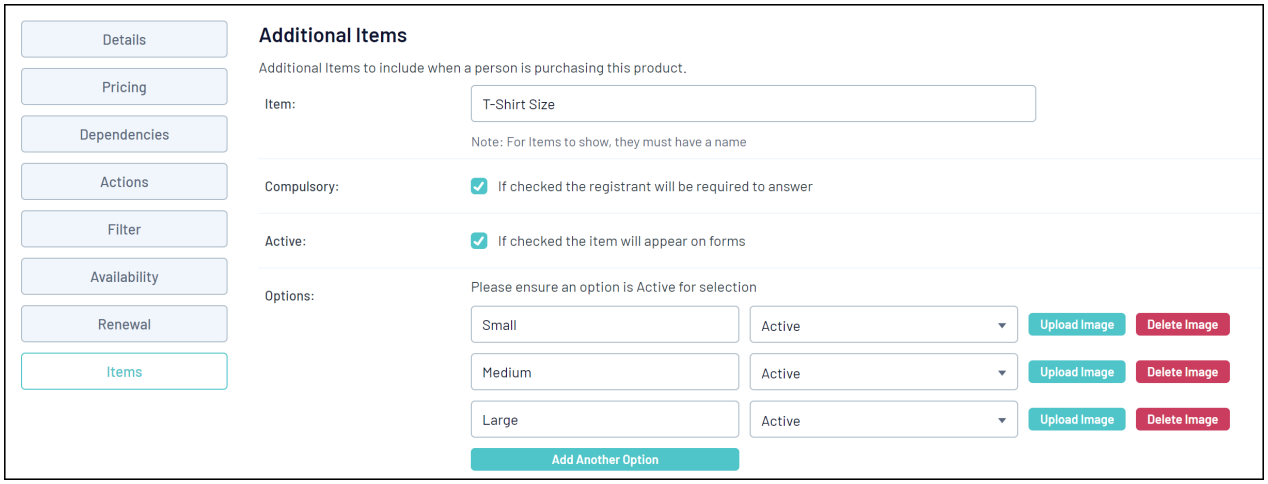
- **Product Linking**: Allows you to select a product that should be purchased once the product being setup has expired.
- **Automatic Reminder Emails**: Notify members that have purchased the product that it will be expiring soon and the product selected above in **Product Linking** is available for purchase.
- **Send Renewal Email to Parents**: You can also select whether or not to send this renewal email to parents as well as the member (if they have different emails).

Note: This will only send to parents emails if these are listed within the members profiles within the Parent 1 Email or Parent 2 Email fields.

Items Tab

The eighth tab on the Add/Edit Products screen is **Items**.

This gives administrators the ability to offer additional add-on items for a specific product, such as a T-Shirt or a Cap.



- **Item**: The selections available for the add-on product (eg. T-Shirt Size)
- **Compulsory**: Select whether the item is required to be selected by members
- **Active**: Select whether the item is to be shown on the form for members
- **Add Another Option**: Add each selectable option that will display for the item (e.g. Sizes Small, Medium and Large)

4. Once you've finished creating your product, click **Update**

If you want to make your Product available for purchase, you will now need toattach it to a Registration Form