



Club Portal User Guide

Guide for Membership Secretaries

Updated October 2019

Contact Us: Clubs@britishcanoeing.org.uk

The Club Portal	3
Club Guide	3
1.0 Accessing the Portal	4
1.1 Creating an account	4
1.2 Current or Lapsed Members	4
1.3 Can't access your account?	5
1.4 Find Your Club	5
1.5 My Club	5
2.0 Club Profile	6
2.1 Updating your Club Profile	6
2.2 How are my club details used?	7
2.3 Managing multiple clubs	7
2.4 Additional Details	8
3.0 Managing Members	9
3.1 Adding Members	9
3.2 Bulk Import for Associate members	10
3.3 Approving Members	11
3.4 Removing Members	11
3.5 Telling a Member their Username	12
4.0 Updating Committee Roles	13
4.1 Adding Roles	13
4.2 Removing Roles	13
5.0 Club Affiliation	14
6.0 Club Reports	16
6.1 Downloading Reports	16
6.2 Members Report	16
6.3 Coach Validation Report	17
7.0 Club Credentials	17

The Club Portal

British Canoeing have moved to a new membership database called GoMembership, which provides an improved online experience and range of services to our 38,000 individual members.

GoMembership also holds information on all affiliated clubs and has been designed to help you with your club administration. The portal can also hold information on your club members and be used as your own database, whilst helping clubs to remain GDPR compliant.

We believe everyone should have access to the latest news, events, and information in the paddling community. By uploading the details of your members, they can choose whether they wish to receive communications from British Canoeing and stay informed. This also helps give accurate information on how many people are involved in paddlesports, which will improve our reporting and help to raise the profile of the sport.

Club Guide

This guide is intended to help you get the most out of the system.

As a club administrator you have more access than an individual member to allow you to manage your club and members. You have a range of features available to you including amending your club details, uploading members, and running reports.

1.0 Accessing the Portal

The portal is managed through your own personal account. This allows clubs to choose who they give access to and lets multiple people manage the club without the need to share passwords.

If you are a past or current British Canoeing member please go to section 1.2, if you have never been a member please see 1.1.

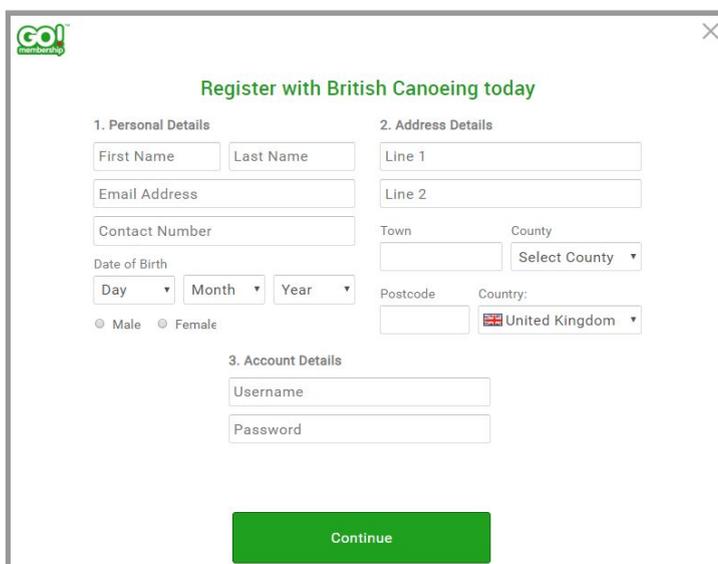
1.1 Creating an account

If you do not already have an account or a membership you can create one by going to www.britishcanoeing.azolve.com and clicking 'Sign Up'

Fill in your details, click continue, and your account will be created. If you already have a club administrator you can now ask them to add you to the club and give you the appropriate role.

If you do not have an administrator set up please contact the membership team.

If you have done a qualification or been a committee member in the past we may already have a record for you.



The screenshot shows a registration form with the following sections:

- 1. Personal Details:** First Name, Last Name, Email Address, Contact Number, Date of Birth (Day, Month, Year dropdowns), and Gender (Male/Female radio buttons).
- 2. Address Details:** Line 1, Line 2, Town, County (dropdown), Postcode, and Country (dropdown, currently set to United Kingdom).
- 3. Account Details:** Username and Password fields.

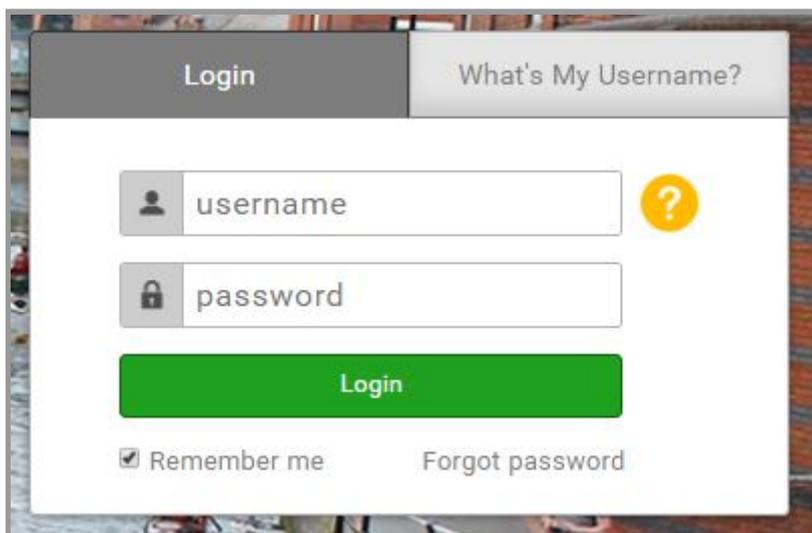
A green 'Continue' button is located at the bottom of the form.

1.2 Current or Lapsed Members

If you are a current member your username will either be your membership number or the username you set yourself when you signed up.

If your membership has lapsed you should still be able to access your account using your previous membership number.

If you do not know or have forgotten your password, type in your membership number and click 'Forgot Password'. This will send you an email containing a password reset link.



The screenshot shows a login page with the following elements:

- Buttons for 'Login' and 'What's My Username?'.
- Input fields for 'username' and 'password'.
- A green 'Login' button.
- Checkboxes for 'Remember me' and 'Forgot password'.

1.3 Can't access your account?

If you are unable to create an account, no longer have access to the email, or any other problems, please contact the membership team and they will be happy to help.

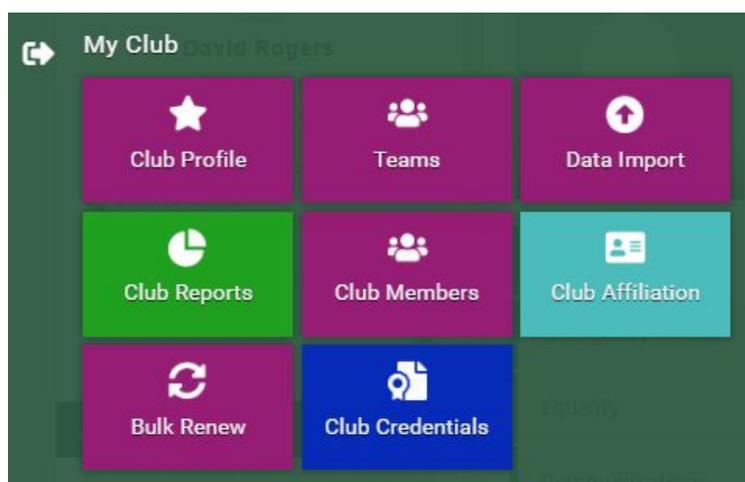
1.4 Find Your Club

You can link yourself to the club by selecting your club on the right hand side of your profile.

1.5 My Club

Once you have created an account and been given access you will now see the 'My Club' section in the main menu. You can access it by opening the main menu in the top left and then clicking on the Club Profile tile.

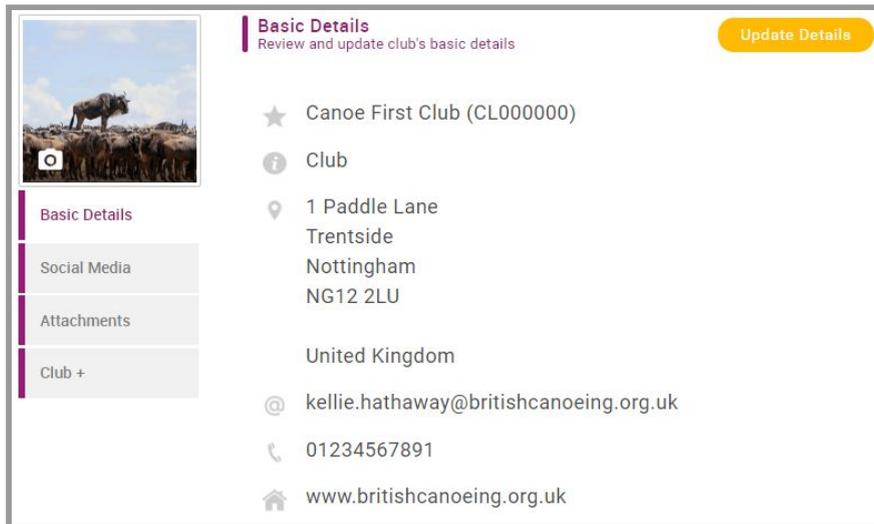
From here you can manage your club.



2.0 Club Profile

Your Club Profile is where you update your club details, including address and contact information.

2.1 Updating your Club Profile



Basic Details
Review and update club's basic details Update Details

★ Canoe First Club (CL000000)

📍 Club

📍 1 Paddle Lane
Trentside
Nottingham
NG12 2LU

United Kingdom

@ kellie.hathaway@britishcanoeing.org.uk

☎ 01234567891

🏠 www.britishcanoeing.org.uk

Click update details to make any changes and make sure you click 'Save'.

When you click on the Club Profile, the club checklist appears on the left-hand side of the screen. This shows where information has not been fully completed.

A green tick indicates the section is complete, and a yellow question mark indicates where fields need completing.

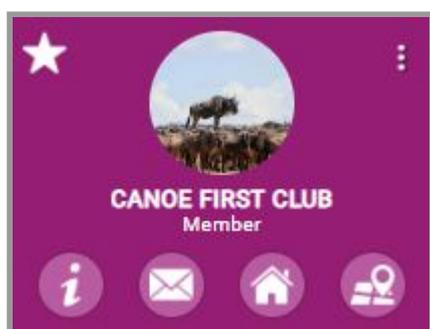
Club Affiliation will display a yellow question mark if your club affiliation has expired and needs renewing.

CLUB CHECKLIST		
★	CLUB PROFILE	✔
GO!	CLUB DETAILS	✔
GO!	CLUB AFFILIATION	?

2.2 How are my club details used?

By providing your club's address, email address and website in your club profile, club members can access it from their own profile page. If your club has an address listed any prospective members will find it when they look for a local club on the Canoe Near You Map.

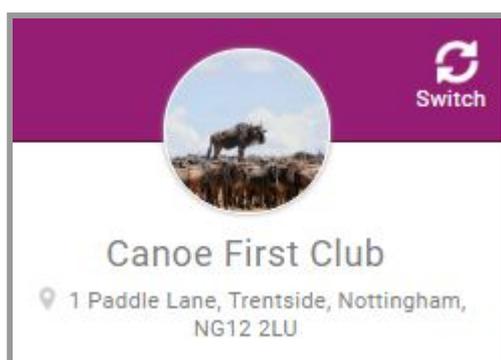
British Canoeing will use the contact information to send out relevant club information.



The 4 icons at the bottom of the club card are hyperlinks and can be used by club members to view club information, contact you, and check the club location.

2.3 Managing multiple clubs

We realise members can be responsible for more than one club, and the portal is set up to make that easy for you.



If you have a role within more than one club you will see a 'Switch' button in the club profile, or on the right hand side in other areas.

Once you click on the button you will see your clubs and you can choose which club you wish to manage. Make sure to check which club you are in when making changes.



2.4 Additional Details

The Club Details tab allows you to update information and input a club description.

Club Profile

★ CLUB PROFILE **GO!** CLUB DETAILS 👤 MEMBERSHIP **GO!** CLUB AFFILIATION 📄 CREDENTIALS 📄 FAMILIES



Additional Details

Qualifications

Club Reports

Club Description

Club Description

Club Description

Save

Please enter a short description of your club, e.g. who your members are, what kind of trips or sessions you do etc. This will be displayed on the British Canoe website so can be viewed by new and potential members:

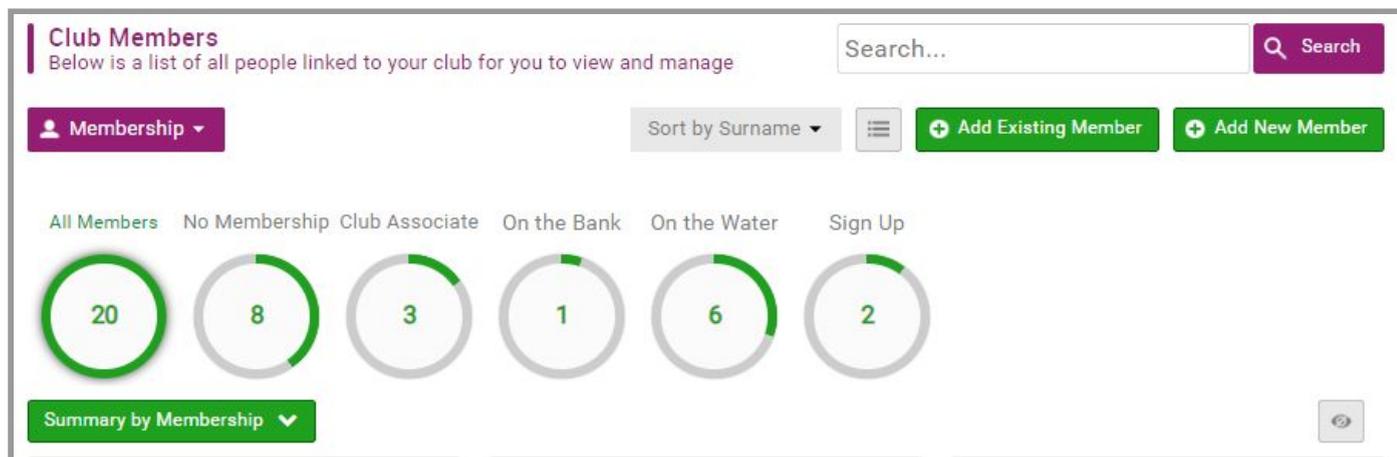
B *I* U **≡** **≡** **≡** **≡** **≡** **≡** **A⁺** **A⁻** **A^o** **T** **H** **≡** **≡**
≡ **A** **↶** **↷** **<** **>**

We are an amazing club and think everyone should join us!

3.0 Managing Members

You can use the membership screen for an at a glance view of members and their categories. They can be viewed by name or licence status. Click on any of the circles to view members in one of these categories.

Members can appear in multiple categories so do not worry if the totals do not add up correctly.



3.1 Adding Members

If you need to add new members to your club there are 3 options

1. If they have individual membership with British Canoeing they can select your club from within their membership area
2. If they have a current or lapsed British Canoeing membership or have completed Personal Performance Awards (e.g. Star Awards) or courses they will have a record already. If this is the case, you can use the "Add Existing Member" process using their membership number, email address, or date of birth.
3. If they are a brand new member you can create a record for them with their basic information.

The screenshot shows the 'Add Member' form. The form is divided into three sections: 1. Personal Details, 2. Address Details, and 3. Account Details. The fields are as follows:

- 1. Personal Details:** First Name, Last Name, Email Address, Contact Number, Date of Birth (Day, Month, Year dropdowns), Male, Female (radio buttons).
- 2. Address Details:** Line 1, Line 2, Town, County, Postcode, Country (dropdown menu).
- 3. Account Details:** Username.

A checkbox is present with the text: "I declare that I have permission to add, update and maintain this person's information on GoMemberships." Below the form, there is a red warning message: "Please complete all mandatory fields before continuing; the fields remaining to be completed are highlighted above." At the bottom, there is a green 'Continue' button.

The fields highlighted are mandatory.

By default the username will be created using the member email address. When registering multiple members that share an email you will need to input a different username.

3.2 Bulk Import for Associate members

If you need to put a group of your club members, who are **not** On The Water or On The Bank members, onto the portal, there is a function that allows you to upload them in bulk.

Click on the Data Import tile in the main menu.

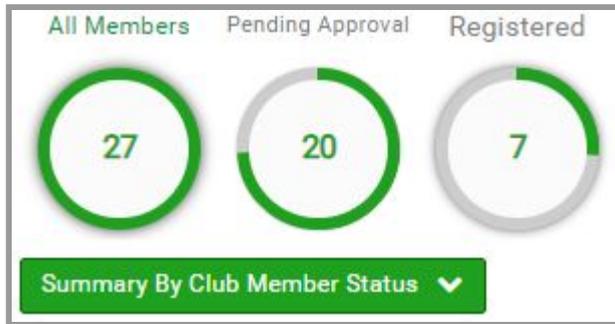


You will see instructions for importing data and the template that must be used.

A screenshot of a web application interface for "Data Import" at "Canoe First Club". The page has a purple header with the title "Data Import" and a dropdown menu for "Canoe First Club". Below the header, there's a pink bar labeled "Members". The main content area is titled "New Import" and contains two numbered steps. Step 1, "Download Template File", includes instructions to download and complete the latest template file, ensuring dates are in dd/mm/yyyy format. It has a "Download File" button and a "Help & FAQs" link. Step 2, "Upload File", instructs users to upload a file by clicking into the area or drag and drop, followed by hitting the import button. It features a dashed blue box with the text "Drag file here or click to upload" and an upload icon. At the top right and bottom of the main content area, there are "Cancel" and "Import" buttons.

1. Download the file and input your members details. There are a number of mandatory fields that are used to help avoid the creation of duplicate records. These are: Name, email address, D.O.B, and username
2. Make sure each username is unique. I would recommend starting with 'Clubname1, Clubname2' etc. These can be changed later
3. The spreadsheet template also has a number of other fields. The more that are included the more complete the records are
4. Once the import is completed, the members will appear in the member area as Club Associates
5. They will receive an email inviting them to sign in to their account and update any communication preferences

3.3 Approving Members



When members add themselves you will need to approve them. If you click on 'Summary By Club Member Status' and then click the circle for 'Pending Approval' you will see a list of the people who have asked to join.

You can now approve or reject these members. Approved members will also have a solid star next to their name.



3.4 Removing Members

Your club profile will show every member of your club including those who have lapsed or possibly left your club.

You can remove them from your club from the Membership screen.



Find the member that you wish to remove.

Click on the 3 dots and select 'Remove from Club'

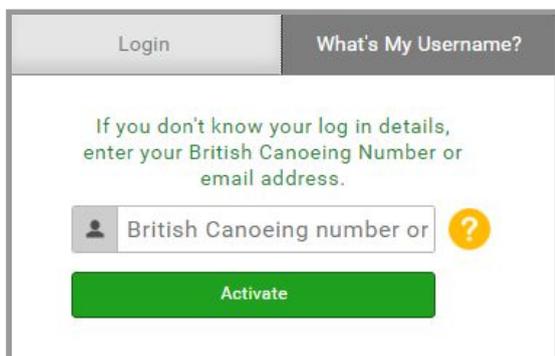
You will need to specify a reason and then click Submit.

3.5 Telling a Member their Username

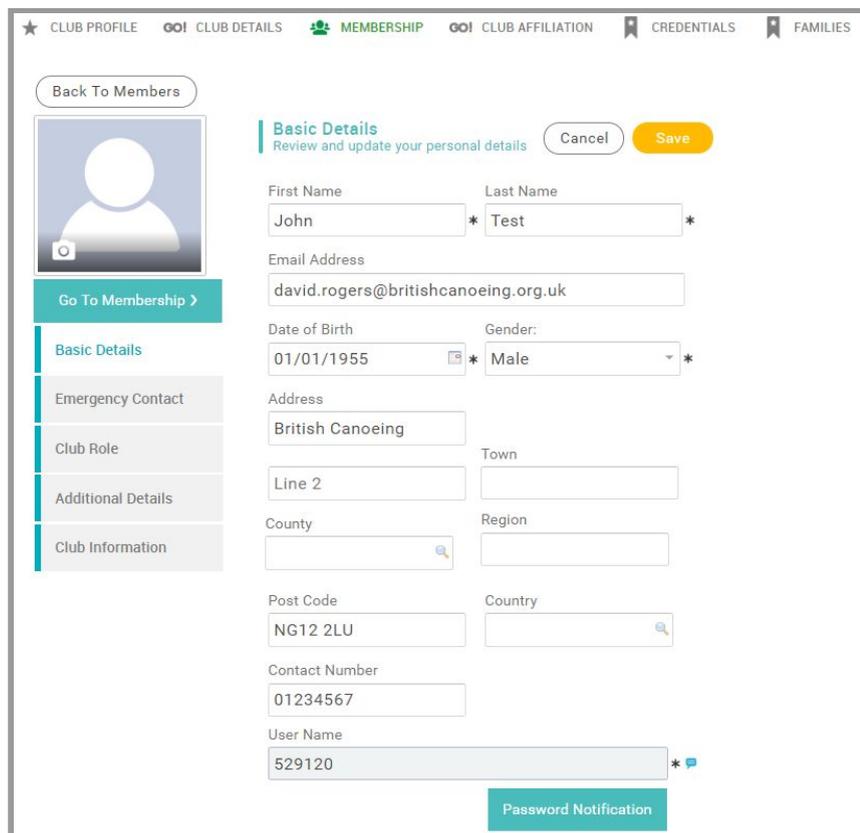
Once a member's account has been created, the username will either be the email address used to create their account or a membership number.

If a member of your club does not know their username, they can either use the 'What's my Username' on the Login page or you can check it for them by clicking into their record. You can change members usernames

If a club member does not know their username they can retrieve it using the 'What's My Username?' section.



The screenshot shows a web interface with two tabs: 'Login' and 'What's My Username?'. The 'What's My Username?' tab is active. Below the tabs, there is a green message: 'If you don't know your log in details, enter your British Canoeing Number or email address.' Below this message is a text input field with a person icon on the left and a yellow question mark icon on the right. The text inside the field reads 'British Canoeing number or'. Below the input field is a green button labeled 'Activate'.



The screenshot shows a member's profile page. At the top, there is a navigation bar with tabs: 'CLUB PROFILE', 'CLUB DETAILS', 'MEMBERSHIP', 'CLUB AFFILIATION', 'CREDENTIALS', and 'FAMILIES'. Below the navigation bar is a 'Back To Members' button. On the left side, there is a profile picture placeholder and a 'Go To Membership' button. Below the profile picture, there is a sidebar menu with options: 'Basic Details', 'Emergency Contact', 'Club Role', 'Additional Details', and 'Club Information'. The main content area is titled 'Basic Details' and contains a form for updating personal details. The form has 'Cancel' and 'Save' buttons. The form fields are: First Name (John), Last Name (Test), Email Address (david.rogers@britishcanoeing.org.uk), Date of Birth (01/01/1955), Gender (Male), Address (British Canoeing), Line 2, Town, County, Region, Post Code (NG12 2LU), Country, Contact Number (01234567), and User Name (529120). At the bottom of the form, there is a blue button labeled 'Password Notification'.

You can do this by going in to their record from the Membership screen.

You will need to click on Update Details and you will see their username at the bottom of the screen.

The blue 'Password Notification' button will send the member an email containing their username and a link from which they will be able to reset their password.

4.0 Updating Committee Roles

Any time there is a change of club officers you can update the club record and make sure the club officers are correct. You can also control who has access to the 'My Club' section.

IMPORTANT

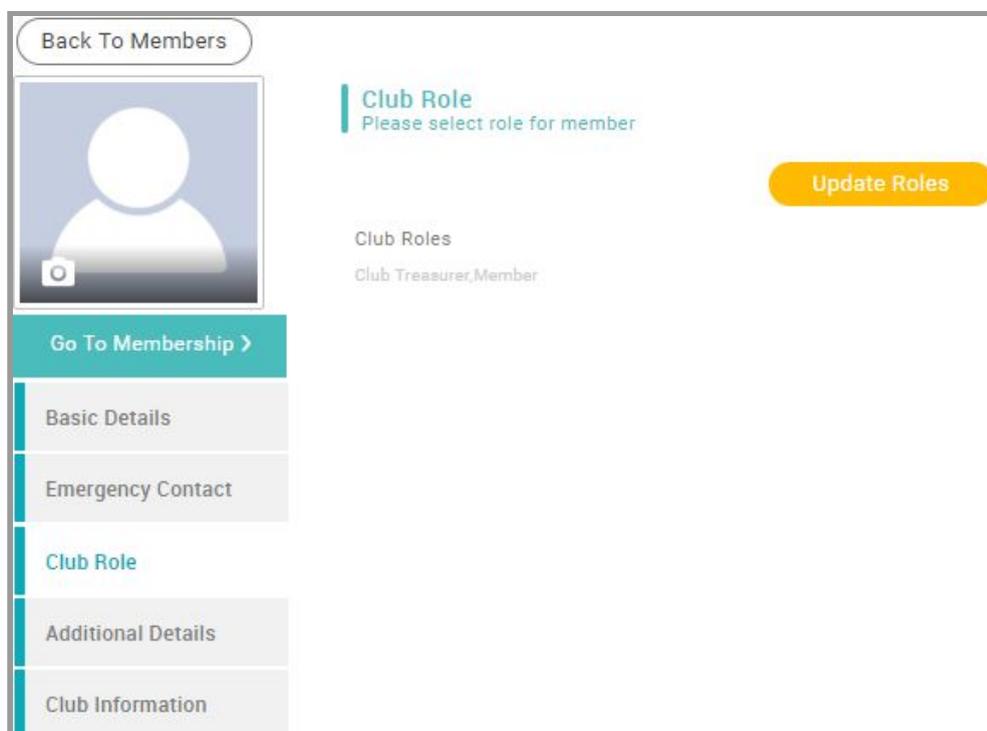
The 'Online Administrator' role gives full access to your club, members, and their personal information. Please ensure this access is only given to those that need it.

4.1 Adding Roles

1. Click on Club Profile and go to the Membership screen.



2. Find the member you wish to add the role to



3. Click on Club Role and then Update Roles
4. Select the roles you wish to give to the member, and click 'Save' once done.

4.2 Removing Roles

If you need to remove a role from someone you follow the steps above but un-tick the role on their record.

5.0 Club Affiliation

Clubs need to renew their affiliation annually, and you can now complete this online, saving time and removing the need for paper forms.

1. Click on Club Affiliation. There you will see your current affiliation, when it expires, and have the option to add another



2. Click on 'Add' to renew your affiliation
3. You will see the 3 affiliation categories, and to select one click anywhere on the box.

£165

Benefits

- British Canoeing family – be part of an organisation that represents your interests, fights your corner and is there for you when you need help and advice
- Promotion – you can use the British Canoeing logo to promote your club and have access British Canoeing promotional campaigns...

[Read more](#)

Senior Club + Youth

£135

Benefits

- British Canoeing family – be part of an organisation that represents your interests, fights your corner and is there for you when you need help and advice
- Promotion – you can use the British Canoeing logo to promote your club and have access British Canoeing promotional campaigns...

[Read more](#)

Senior Club

£100

Benefits

- British Canoeing family – be part of an organisation that represents your interests, fights your corner and is there for you when you need help and advice
- Promotion – you can use the British Canoeing logo to promote your club and have access British Canoeing promotional campaigns...

[Read more](#)

Junior Club

4. Once you select a category, scroll down and you will be asked for more details. These will be the same as the questions on the paper affiliation form
5. The table of members needs to be completed and this will automatically calculate your per capita charges. **If this section is incomplete your members will not be insured**

Age	Club Members			
	British Canoeing Members		Non - British Canoeing Members	
	Males	Females	Males	Females
13 and Under	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
14 - 18	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
19 - 25	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
26 - 45	<input type="text" value="5"/>	<input type="text" value="15"/>	<input type="text" value="12"/>	<input type="text" value="10"/>
46+	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Total:	<input type="text" value="5"/>	<input type="text" value="15"/>	<input type="text" value="12"/>	<input type="text" value="10"/>

6. If you need to purchase your club waterways licences add the number required

Club Officials:

Chairperson	<input type="text"/>	Welfare Officer 1	<input type="text"/>
Treasurer	<input type="text"/>	Welfare Officer 2	<input type="text"/>
Secretary	<input type="text"/>		

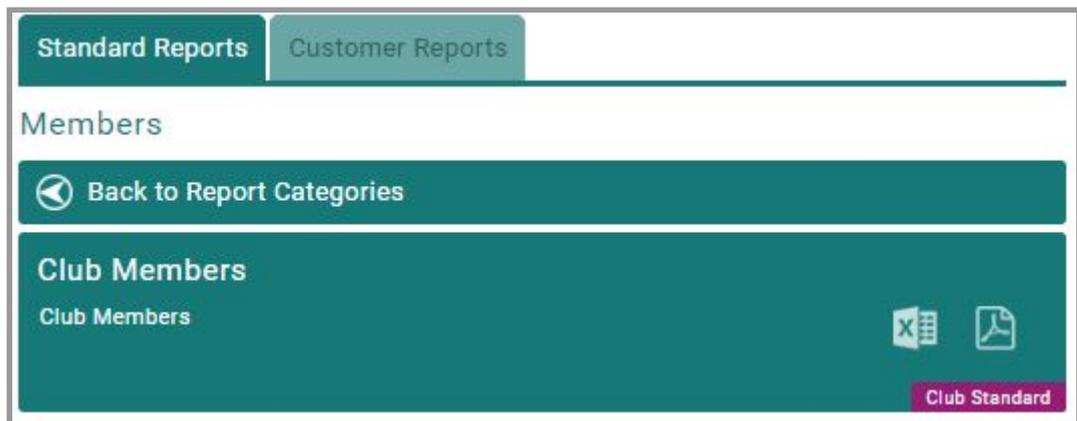
7. Fill in the details for the key members of your committee
8. Select whether you will be using the British Canoeing Liability Insurance
9. Please confirm your club disciplines and activities
10. You'll need to tick the 2 declaration tick boxes and then select Check Out.
11. Your affiliation fee is calculated for you and you will have the option to pay by card or direct debit. If you wish to pay by another method please fill in the form, click 'Checkout', and contact Clubs@britishcanoeing.org.uk and we can provide you with an invoice or BACS details
12. Once payment is made you can print a receipt and your Affiliation Pack will be sent out in the post

6.0 Club Reports

As a club administrator you can run a number of reports on members either in a **Basic** (PDF) or **Extended** (Excel) format.

6.1 Downloading Reports

Club reports are split into two sections, Standard Reports and Customer Reports. They can be downloaded by clicking the icons on the right in Excel or PDF format.



6.2 Members Report

The Members report will list:

- Membership number
- Names
- Contact details
- Membership category
- Status
- Expiry Date

Example Report:

	A	C	D	E	F	G	H	I	J
1									
2									
3	MID	Firstname	Surname	DOB	Gender	Contact Number	Emergency Contact	Email Address	Address
4	529121	Jane	Test	01/01/1960	Female		Relation: Number: Email:	david.rogers@britishcanoeing.org.uk	denjdensdn
5	529123	Jess	Test	01/01/2010			Relation: Number: Email:	david.rogers@britishcanoeing.org.uk	sfonsfbn
6	529122	Jimmy	Test	01/01/2005			Relation: Number: Email:	david.rogers@britishcanoeing.org.uk	
7	529120	John	Test	01/01/1955	Male	01234567	David Rogers Relation: Parent Number: 0000000000000000 Email:	david.rogers@britishcanoeing.org.uk	British Canoeing NG12 2LU
8	000081	tt	ww	01/01/1978	Male	123	Relation: Number: Email:	tt.ww@ww.com	Azolve Limited1 1 Glasgow HG1 1BL
10									

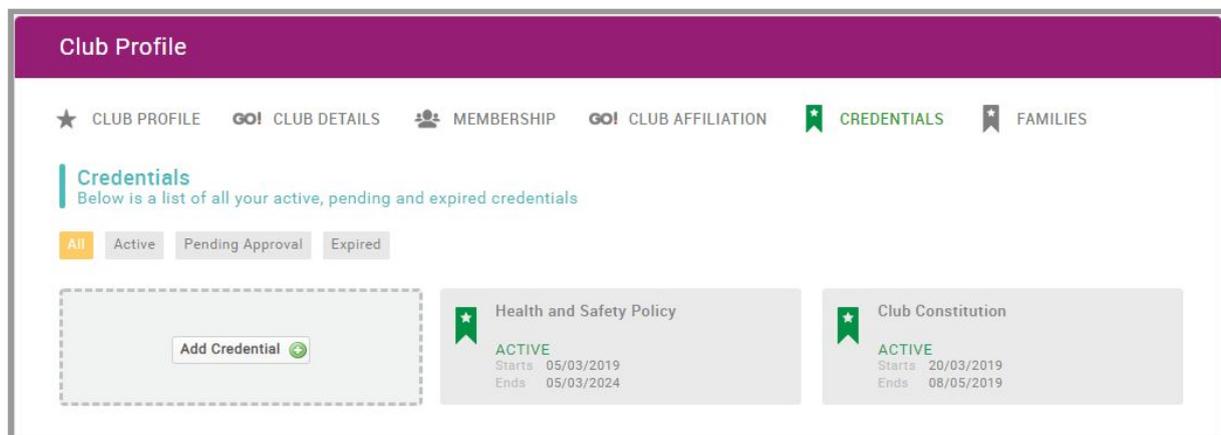
6.3 Coach Validation Report

The 'My Club Members with Coach Validation' report will list:

- Qualifications
- First Aid
- Safeguarding
- Continuous Professional Development (CPD)
- BC Membership Status

7.0 Club Credentials

The Club Credentials tab is where you can store club documents and have them approved for your Quality Mark. These documents can only be viewed by other Online Administrators.



Click 'Add Credential' and follow the steps to upload your documents.