



Checklist for Club Account Configuration

The checklist below will enable us to configure your account before your training session. Once the training is complete you will be able to adjust this configuration yourself. Please review this document carefully. We recommend that 2 people in the club agree to the information supplied in this document. Requests for additional configuration will be charged at a rate of €100 per hour.

Please answer the questions below and return by email to support@easypaymentsplus.com

- 1. What email address do you want to receive all copies of payment receipts? We recommend that you create a new email address for this, so that your main email address is not clogged up with receipts.

Please indicate an email address below:

Example: accounts@epp.test

- 2. What email address do you want us to use for monthly billing after your account is live and transacting?

Please indicate an email address below **(Note you can also enter a second email address and the invoices will be sent to both)**

Example: accounts@epp.test

3. User Registration – User types and questions to ask at registration

When members are registering their details and those of other family members they will select a “user type” for easy identification for the club.

Figure1: Sample “user types”

	Sample user type	Sample user type	Sample user type	Sample user type
Scouts	Parent/Guardian	Cub	Beaver	Adventurer
Soccer Rugby GAA Etc.	Parent/Guardian	Born 2010	Born 2011 etc.	
Tennis	Parent/Guardian	Senior	Junior	Pavilion



Each “user type” can be customised to request information in relation to each type. E.g. for a junior you may ask for date of birth but for a senior member you don’t need this information.

The default questions available are ... Gender, nationality, date of birth, mobile, email address and team / section.

You also have the option to define your own questions to ask during registration.

Questions can allow for free format answers or present the member with a list of pre-defined answers.

Figure2: List of registration questions with free format answers you would like to use.

***Please complete

1.	Do you have any relevant medical conditions or injuries?
2.	
3.	
4.	
5.	
6.	
7.	

Figure3: List of registration questions with pre-defined answers (selection Lists) you would like to use.

***Please complete

	Selection List	Answer	Answer	Answer	Answer
1.	Do you agree to abide by the club’s code of conduct?	Yes	No		
2.	Are you willing to volunteer in the club?	Will serve on a committee	Will help with catering	Will be available as driver	
3.					
4.					
5.					
6.					
7.					

Note: The items in grey as for illustrative purposes only and can be overwritten. (please add additional columns if there are more possible answers)



Please complete the table below adding any user types relevant to your club. Indicate for each type the data you would like the system to record for each using Y/N. Use the details you have entered in figure 2 and indicate the question no.'s required (if any) and the details entered in figure 3 to indicate the selection list no.'s required (if any).

Note: If Team is selected then the member can select their own team. The alternative is to allocate them to a team once they have registered and paid.

Figure4: User Type list and options selected

	M/F	Nationality	Date of Birth	Mobile	Email	Team or Section	Question 1	Question 2	Question 3	Selection List 1	Selection List 2	Selection List 3
Parent/Guardian	Y	N	Y	Y	Y	N	1			1	2	
Senior												
Junior												
Born 1999												
Born 2000 etc.												

Please add additional sheets where appropriate.

4. Expenses

When a member selects an item for payment you can ask for additional information.

Please complete the tables below with any questions you would like to ask when a member selects an item for payment.

Figure4: List of questions with free format answers you would like to ask when a member selects an item for payment *****Please complete**

1.	Who will collect from training?
2.	
3.	
4.	
5.	
6.	
7.	

Figure5: List of questions with pre-defined answers (selection Lists) you would like to use when a member selects an item for payment. *****Please complete**

	Selection List	Answer	Answer	Answer	Answer
1.	Jersey Size	Small	Medium	Large	
2.					
3.					
4.					
5.					
6.					

Note: The items in grey as for illustrative purposes only and can be overwritten.
(please add additional columns if there are more possible answers)

Instalments

A fee item can be defined to enable a member to pay in automatic instalments. When a fee item is defined to allow instalments the total cost of the item is divided by the number of instalments. In the sample fee below an instalment plan is setup so that €30 is debited from the card on the 1st day of each month starting from 01/01/2020.

An emailed reminder is sent to the payer 5 days before the instalment is due and then a receipt is sent to the payer each time the instalment is processed. If an instalment fails, the payer receives notification of this with instructions on how to reissue the payment. The failed instalment will NOT be automatically attempted again. The next instalment will be processed on the next due date.

Detailed payment reports are available showing all instalments processed and highlighting all failed instalments.



Please input below any expenses due for payment or that are commonly paid for by members throughout the year. Also, please indicate the Total Cost AND if you would like to offer the option of paying in instalments. Note: The questions defined above can be used as a member pays for an item. Please indicate the relevant questions below.

Fee Name	Total Cost	Instalment Option (Y/N) *	Instalment Frequency e.g. Monthly, Weekly etc.	No. of instalments	Start Date	Question 1	Question 2	Question 3	Selection List 1	Selection List 2	Selection List 3
Junior membership 2019/2020	120.00	Y	Monthly	4	01/01/2020						
Easter Camp	80.0	N									

Discounts

Discounts can be applied to payment items based on the number of items selected for payment. A discount can be either a fixed amount or a percentage. In the text box below please outline any discounts that you would like to apply.

e.g. 10% sibling discount for all camps

5. Teams

During the training you will learn how to create teams and allocate players to teams.

6. If you want to pass an Administration Fee to your members when they make online payments using Easy Payments Plus please indicate the amount here.

Or

This administration charge is added to the bill and appears as an administration fee. The amount passed on can be a fixed amount or a % of the total transaction charge.

Unfortunately, we cannot advise you on what charge to apply (if any) You will need to estimate this based on the transaction charges you incur for merchant services and EPP.

7. Retail Payments – One of the facilities we provide is for members to have the facility to pay cash in any Payzone retail shop. To use this option, you would send each member a payment request through the system via text or email. This generates a bar code or reference number which can be presented in the shop together with the payment.

Please indicate if you would like use to enable this facility. We will require your IBAN to transfer the funds received to your bank account.

IBAN

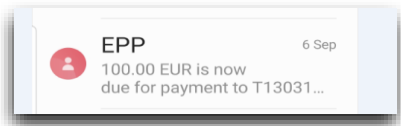
8. If you want emails generated by the system to be sent from your own club’s email domain please complete the details below (e.g., noreply@clubname.ie). Otherwise all emails will be sent from noreply@easypaymentsplus.com

- Username:
- Email Address:
- SMTP Server:
- SMTP Port Number:
- Email Password (**N.B. For security purposes, please send this in a separate email**)

9. How would you like your sender ID to appear on text messages (**max 11 characters**)
The sender ID is the sender name that is displayed when a text message is received.

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When text messages are sent from the system the default sender is EPP. This can be changed to something that will be more familiar to your members.



10. Terms and conditions – Child protection Policy – Code of Conduct

During the initial setup of your account you should have received an email containing our sample terms and conditions file. If you have not already done so then update this and where appropriate include details of your child protection policy and your code of conduct.

If you have not already done so, please return the terms and conditions document to us with this completed checklist.

Upon registration, members will tick a box to say they agree to your terms and conditions. We can also include the additional questions –

Please indicate that you agree to abide by our code of conduct as outlined in the terms and conditions (Yes option only)

Please indicate that you have reviewed our child protection policy as outlined in the terms and conditions (Yes option only)

Please indicate if you would like us to include these questions

11. Administrators

The system provides you with the facility to have multiple administrators.

There are 2 types of administrator - General Administrators and Team Administrators.

- General Admins have full access to the system.
- Team Admins can be given access to specific teams and fees only.

The initial configuration includes the definition of one administrator. The training and help documentation will advise on how to create other administrators.

If an Administrator is also a member or the parent of a member of the Club, they will need to have a separate email address for their Admin login.

12. 3D Secure

3D Secure is a protocol used as an added layer of security for online credit and debit card transactions by adding another authentication step in the form of a password.

The benefit to you is that you reduce your risk of fraudulent transactions.

3D Secure will be enabled on your account within a couple of days of going live.

I confirm that the information supplied in this document is accurate and comprises the configuration we require on our Easy Payments Plus account.

Any significant changes to this document after the configuration is complete will incur a charge of €100 per hour for any work completed.

Signed by: _____ Position: _____

Signed by: _____ Position: _____

Club: _____ Date: _____