



# SET UP UNIONE FOR THE NEW YEAR

How to

**uclife<sup>x</sup>**

# 1. CREATING A GROUP

A group is required within your club page to enable members to join your club. Groups can be used in many different ways to create segments of members within your club. For example you could create a membership group for your committee so that you have an easy mailing list, or groups for specific interest areas (like particular games, or types of activities that your club runs). A student can be part of multiple groups. Only students that are listed as a member of a group are counted in your membership statistics with UCLifex.

## Step 1: Groups > New

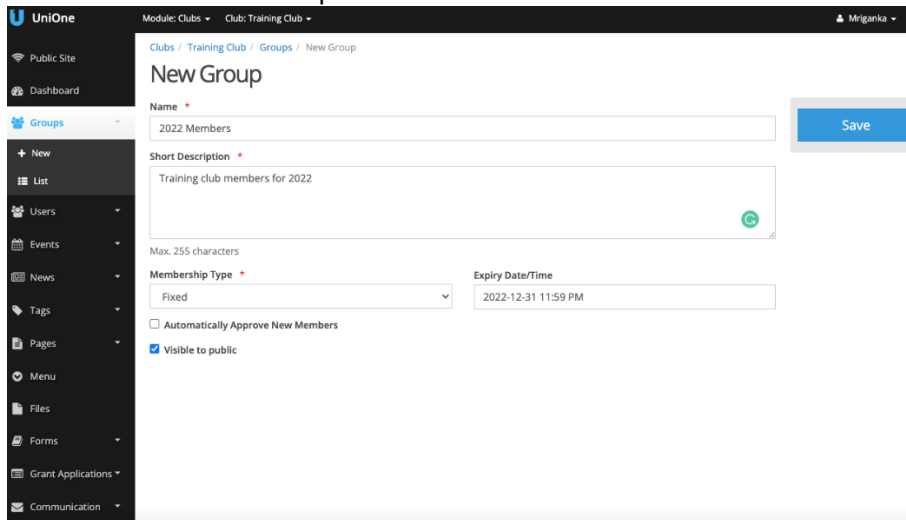
Create a new group for your members for the new year. This will be then linked to your membership product and form.

## Step 2:

Change membership type to 'fixed' from the dropdown menu and set the expiry date to Dec 31<sup>st</sup>.

A reminder that all memberships expire at the end of the calendar year except for honorary memberships that can be awarded by the club to members that make a special contribution.

Ensure that the 'visible to public' box is ticked as below.



Save the group.

# 2. CREATING A PRODUCT

Products are listed on the store of UniOne and can include tickets, memberships, merchandise or anything that your club is selling.

**Step 1:** Store > Product > New (on the top left corner)

**Step 2:** Create descriptions.

**Step 3:** Set price to a minimum of \$5 per year (this is set in your constitution, any variance must be discussed with UCLifex).

Ensure the hidden to public box is unticked and the other options are selected as per the image below. Especially the Transfer account needs to be selected to ensure that funds are transferred to your club.

## 3. CREATING A FORM

A form is important to maintain records of members. It also serves as a way to filter potential members and manage expectations, as you can ask questions such as why someone wants to join your club or which activities they hope to participate in.

While membership forms are encouraged, they're not compulsory.

**Step 1: Forms > New**

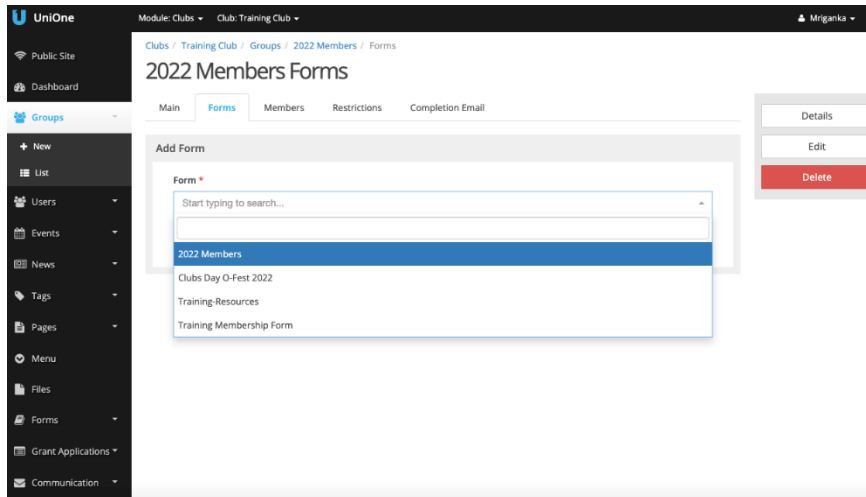
**Step 2: Set approved form responses to 1000, 100 max responses per user and change access to 'user'**

**Step 3: Create questions relevant to your club. Start off by asking for user's name, student email, year of study, etc. It helps to ask which course they're enrolled in and why they want to join your club.**

# 4A. LINKING FORM TO MEMBERSHIP GROUP

**Step 1:** Go to Groups > List > [your membership group] > Forms

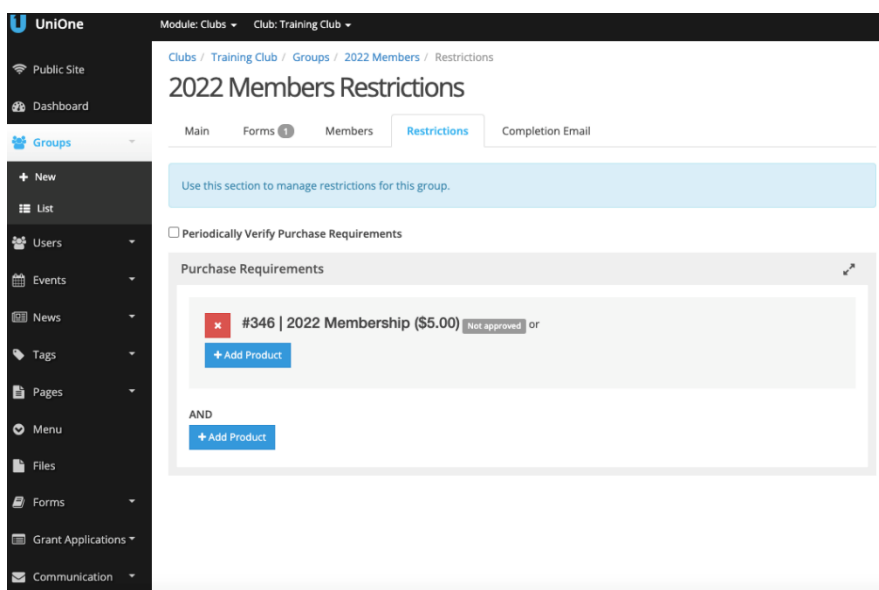
**Step 2:** Select the form you just created from the dropdown menu and click Add.



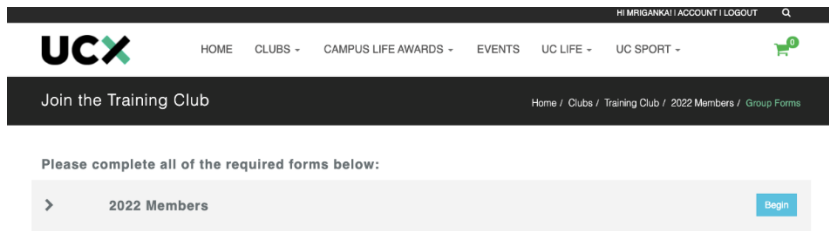
# 4B. LINKING PRODUCT TO MEMBERSHIP GROUP

**Step 1:** Go to Groups > List > [your membership group] > Restrictions

**Step 2:** Select the product you just created from the dropdown menu and click Add.



All done! Test this out by going to your club page in Unione. If you have successfully linked the product and form to your page, it should look like this when you click 'Join club' and select your membership group:



The screenshot shows the UCX website interface. At the top, there is a navigation bar with the UCX logo on the left and links for HOME, CLUBS, CAMPUS LIFE AWARDS, EVENTS, UC LIFE, and UC SPORT on the right. A search icon is also present. Below the navigation bar, a dark header contains the text 'Join the Training Club' and a breadcrumb trail: 'Home / Clubs / Training Club / 2022 Members / Group Forms'. The main content area features the instruction 'Please complete all of the required forms below:' followed by a light gray button labeled '2022 Members' with a right-pointing chevron and a 'Begin' sub-button.