

### MAINTAINING YOUR CRM AFFILIATE PROFILE

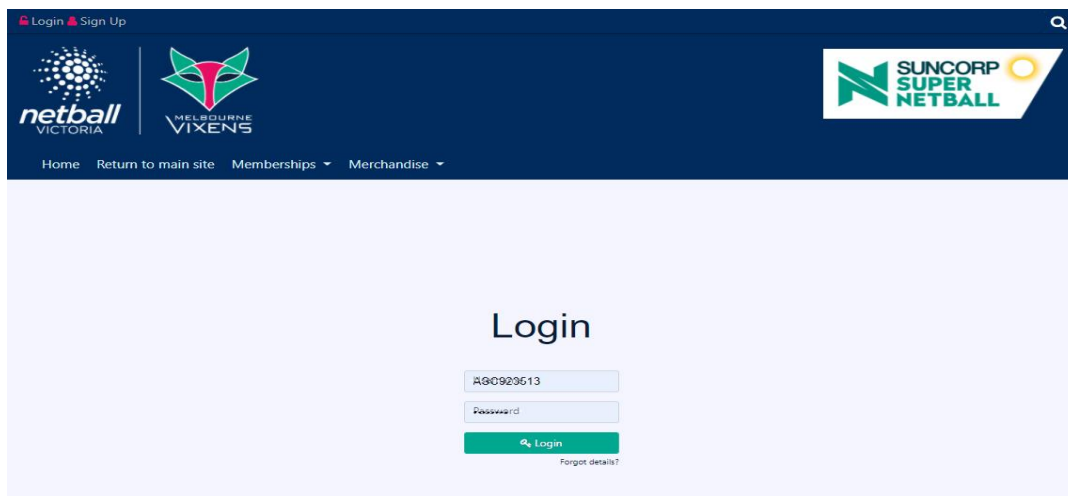
Last updated: November 2020

NV's (CRM) system is used to collect and store important contact, competition, facility and governance information for each affiliate. The information you load into the CRM allows us to better support you. It is important you keep the information in your profile as current as possible.

The CRM enables NV to communicate with our affiliates more effectively and efficiently, targeting specific messages for specific contacts i.e. a NetSetGO offer will only be sent to the NSG Centre coordinators.

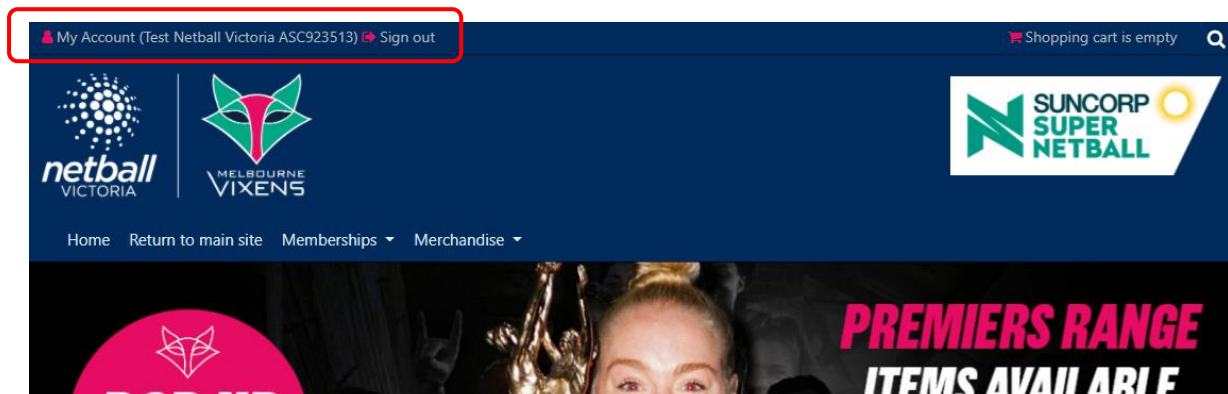
It is highly recommend to include 'CRM Updates' as a standing agenda item in your meetings, so that any changes to your committees, By-laws, Constitution, AGM dates or other important information can be actioned by a designated committee member and update as changes occur.

The simplest way to login is to either favourite this [page](#) or go in via the shortcut on the NV website under Resources > Affiliate CRM Login.

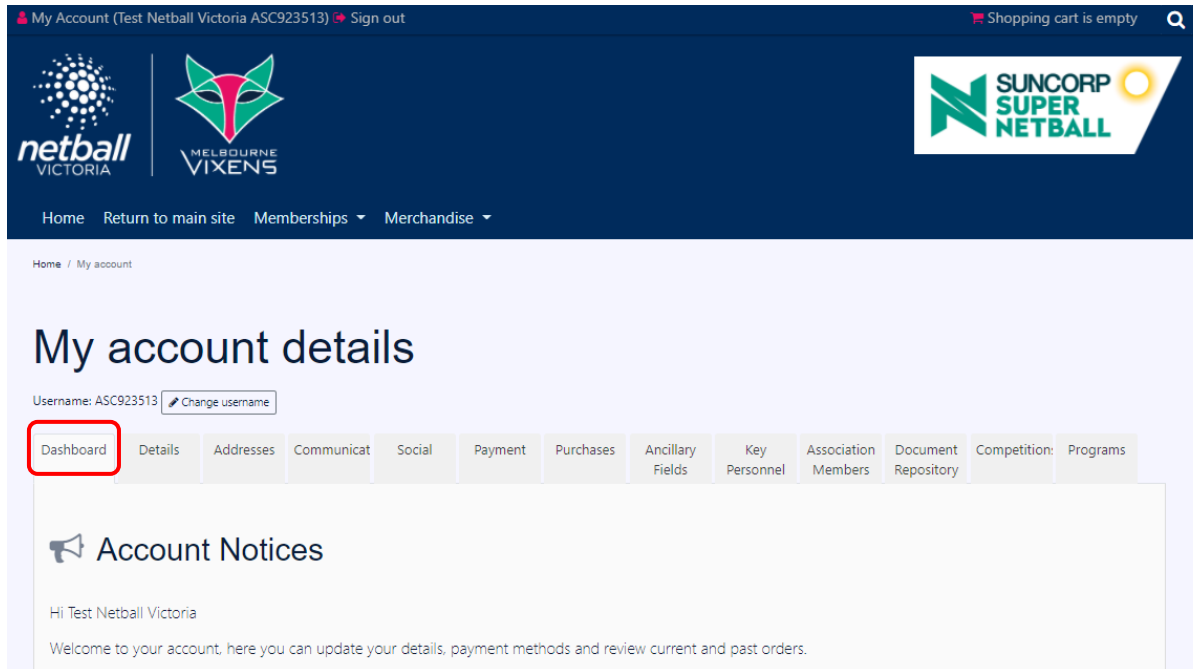


The screenshot shows the Netball Victoria CRM Login page. At the top, there is a navigation bar with the Netball Victoria and Melbourne Vixens logos, and a Suncorp Super Netball logo. Below the navigation bar, the page has a light blue background with the word "Login" in the center. There are two input fields: one for the username "A9C923513" and one for the password. Below the password field is a green "Login" button. A link "Forgot details?" is located below the login button.

Access your account by clicking on My Account in the top left hand corner.



**DASHBOARD** – Account notices will appear here.



My Account (Test Netball Victoria ASC923513) Sign out Shopping cart is empty

netball VICTORIA MELBOURNE VIXENS SUNCORP SUPER NETBALL

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### My account details

Username: ASC923513 Change username

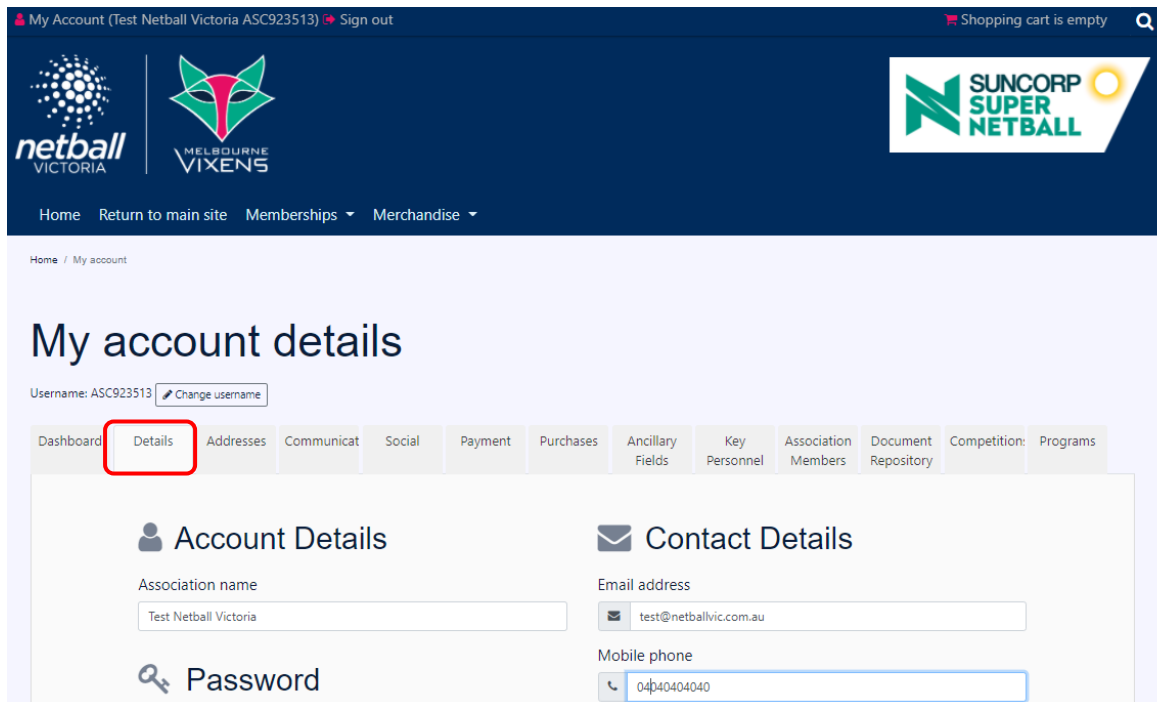
Dashboard Details Addresses Communicat Social Payment Purchases Ancillary Fields Key Personnel Association Members Document Repository Competition: Programs

#### Account Notices

Hi Test Netball Victoria

Welcome to your account, here you can update your details, payment methods and review current and past orders.

**DETAILS** – Association and contact information with an option to change your password.



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### My account details

Username: ASC923513 Change username

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#### Account Details

Association name

Test Netball Victoria

#### Password

#### Contact Details

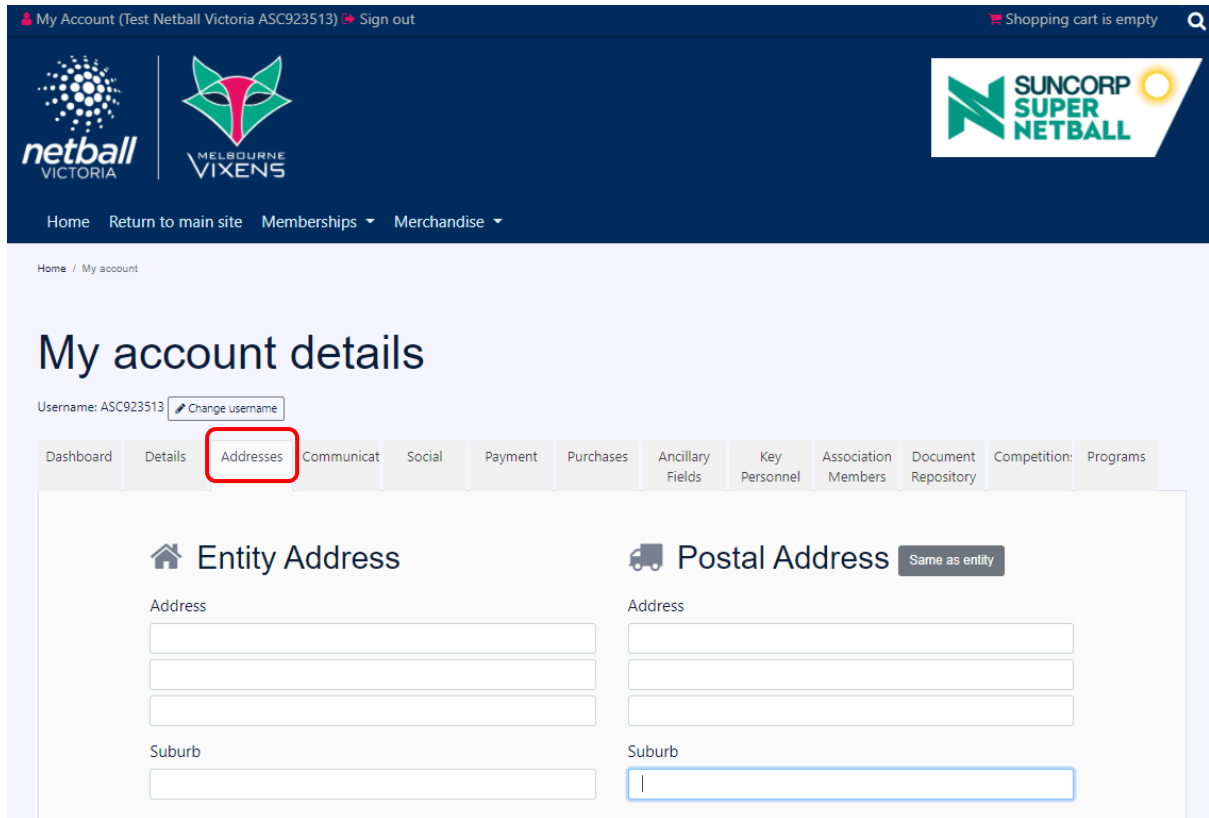
Email address

test@netballvic.com.au

Mobile phone

04p40404040

**ADDRESSES** – Include both the entity address and postal address for your organisation.



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## My account details

Username: ASC923513 Change username

Dashboard Details **Addresses** Communicat Social Payment Purchases Ancillary Fields Key Personnel Association Members Document Repository Competition: Programs

### Entity Address

Address

Suburb

Postcode

### Postal Address

Same as entity

Address

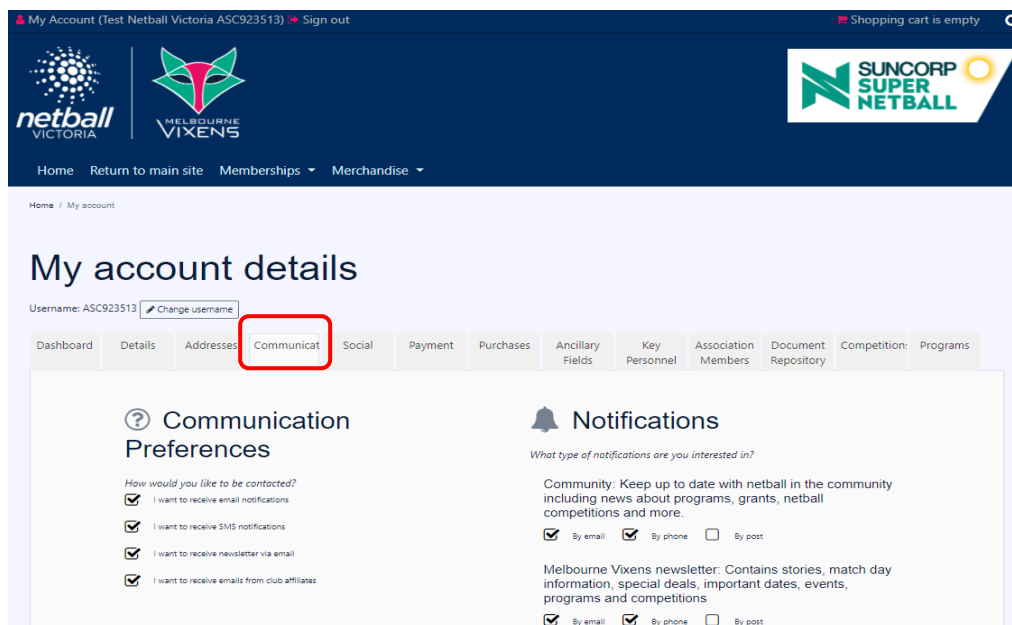
  
  
  

Suburb

Postcode

**COMMUNICATION** – Set your communication preferences here. How would you like to be contacted and what would you like to receive?



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## My account details

Username: ASC923513 Change username

Dashboard Details Addresses **Communicat** Social Payment Purchases Ancillary Fields Key Personnel Association Members Document Repository Competition: Programs

### Communication Preferences

How would you like to be contacted?

☒ I want to receive email notifications

☒ I want to receive SMS notifications

☒ I want to receive newsletter via email

☒ I want to receive emails from club affiliates

### Notifications

What type of notifications are you interested in?

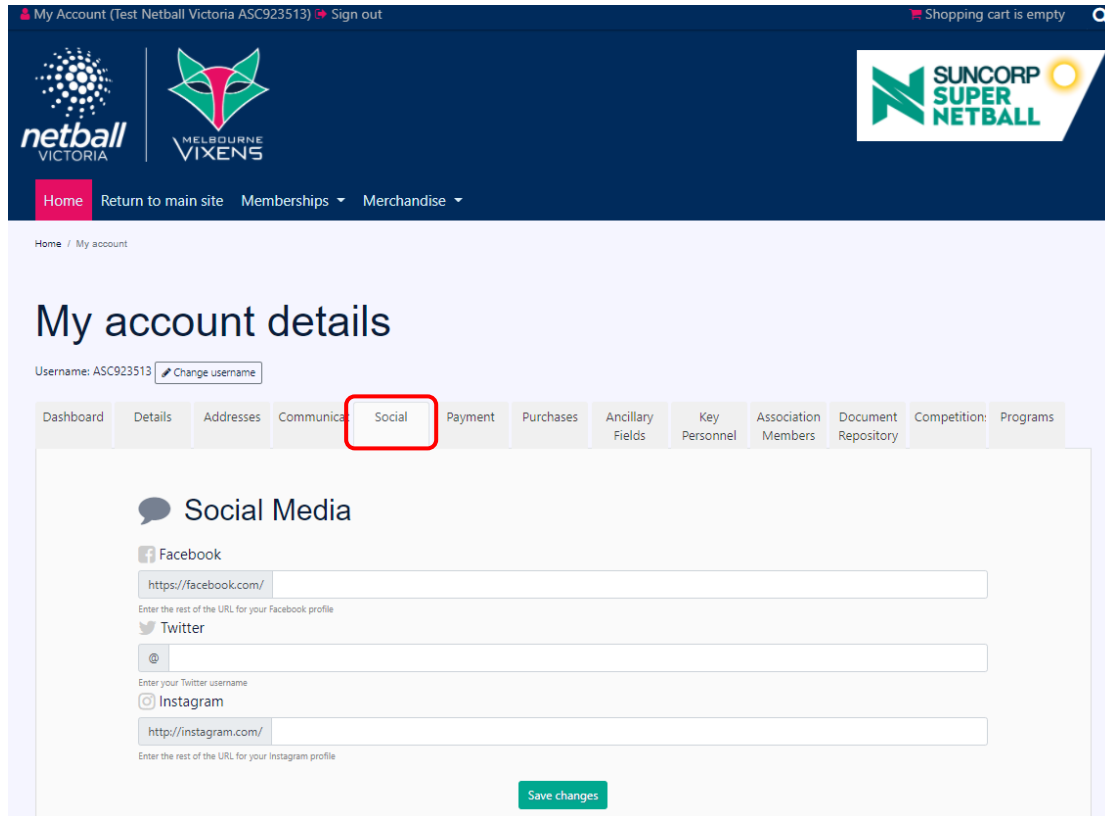
Community: Keep up to date with netball in the community including news about programs, grants, netball competitions and more.

☒ By email ☒ By phone ☐ By post

Melbourne Vixens newsletter: Contains stories, match day information, special deals, important dates, events, programs and competitions.

☒ By email ☒ By phone ☐ By post

**SOCIAL** – enter links to your social media platforms.



The screenshot shows the 'My account details' page for a user named 'Test Netball Victoria ASC923513'. The 'Social' tab is highlighted with a red box. The page includes fields for Facebook, Twitter, and Instagram links, and a 'Save changes' button.

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### My account details

Username: ASC923513 Change username

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#### Social Media

Facebook

https://facebook.com/

Enter the rest of the URL for your Facebook profile

Twitter

@

Enter your Twitter username

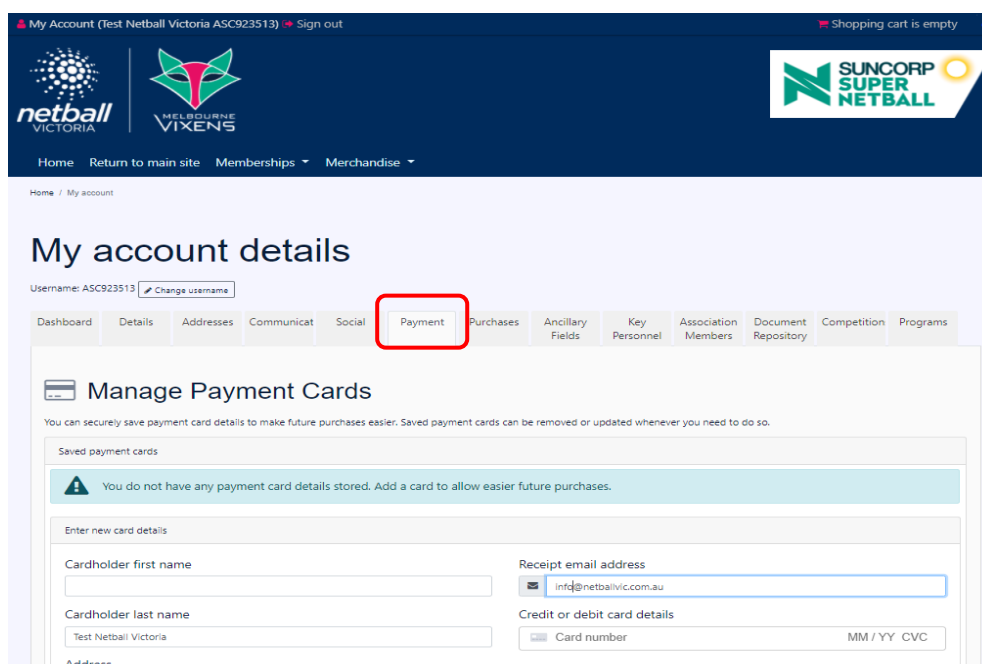
Instagram

http://instagram.com/

Enter the rest of the URL for your Instagram profile

Save changes

**PAYMENT** – The option to add credit card information to make purchases through the site easier.



The screenshot shows the 'My account details' page for a user named 'Test Netball Victoria ASC923513'. The 'Payment' tab is highlighted with a red box. The page includes a 'Manage Payment Cards' section with a message indicating no payment card details are stored, and a form to enter new card details.

My Account (Test Netball Victoria ASC923513) Sign out Shopping cart is empty

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### My account details

Username: ASC923513 Change username

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#### Manage Payment Cards

You can securely save payment card details to make future purchases easier. Saved payment cards can be removed or updated whenever you need to do so.

Saved payment cards

You do not have any payment card details stored. Add a card to allow easier future purchases.

Enter new card details

Cardholder first name

Cardholder last name

Test Netball Victoria

Address

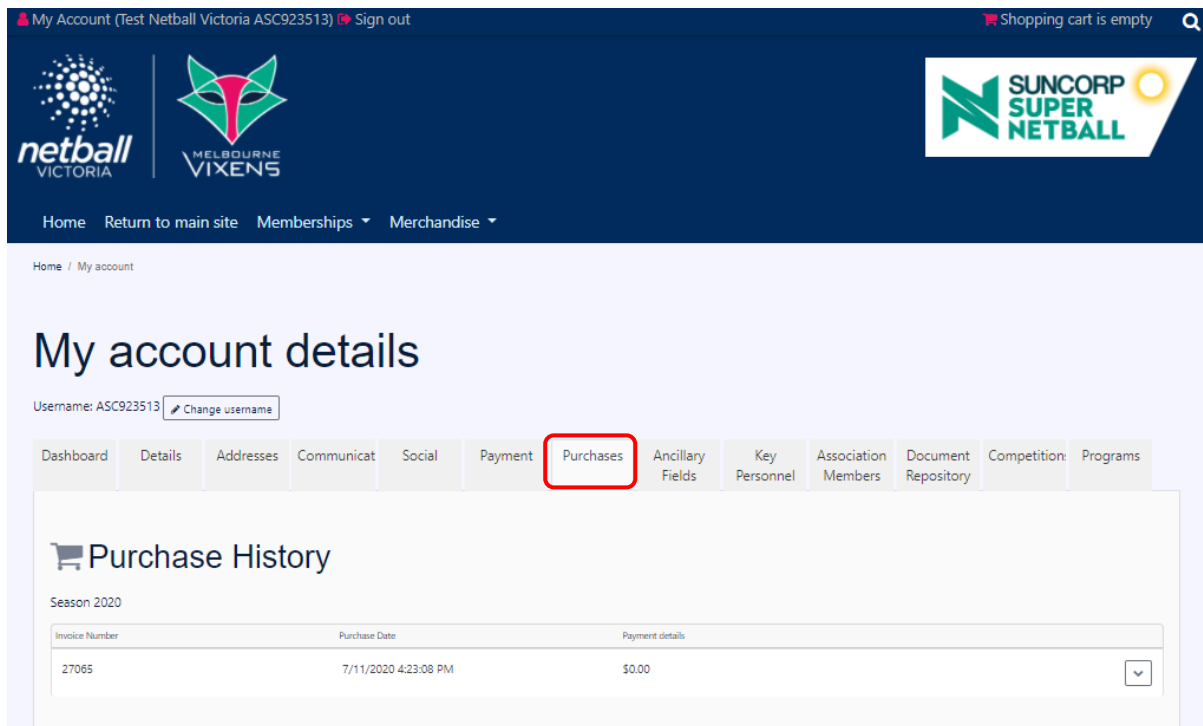
Receipt email address

info@netballvic.com.au

Credit or debit card details

Card number MM / YY CVC

**PURCHASES** – shows invoices for previous purchases made.



The screenshot shows the 'My account details' page. The 'Purchases' tab is highlighted with a red box. Below the tabs, the 'Purchase History' section is visible, showing a table of purchases for Season 2020.

| Invoice Number | Purchase Date        | Payment details |
|----------------|----------------------|-----------------|
| 27065          | 7/11/2020 4:23:08 PM | \$0.00          |

## ANCILLARY FIELDS

The Ancillary information is really important to Netball Victoria. Our facilities department uses this data to advocate to councils for upgrades to facilities, such as lighting.




This section captures your details of your AGM, ABN information and preferred method of communication.

**AFFILIATION DECLARATION** - This is acknowledgement that you have read, understood and agreed to the Affiliation and Membership policy in the Depository tab.

**FACILITY AND GOVERNANCE** – We regularly download reports and use the data for submissions for facility and other funding opportunities. We advocate on your behalf with this data, so it is important it is all captured in the CRM to assist in those submissions.

My Account (Test Netball Victoria ASC923513) Sign out

Shopping cart is empty

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## My account details

Username: ASC923513 [Change username](#)

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[Details](#)
[Addresses](#)
[Communicat](#)
[Social](#)
[Payment](#)
[Purchases](#)
[Ancillary Fields](#)
[Key Personnel](#)
[Association Members](#)
[Document Repository](#)
[Competition](#)
[Programs](#)

### Ancillary Fields

Financial Information

AGM Date

30/09/2019

Registered for GST?

Yes

ABN

123456789

Preferred communication method

Email

Do you have an ABN?

Yes

I am an authorised delegate of our Association / League and have read, understood and agree to the

2020 Affiliation Declaration

Yes

Facility Information

Local government authority

Melbourne

Name of venue

King Street

Rec Reserve or other known name of Venue

Netball Vic

Venue address

473 King Street

Venue suburb

West Melbourne

Governance

Do you have a paid administrator

Yes

Constitution supplied

Yes

By-laws supplied

Yes

Clubs participating in your competitions

8

#### ANNUAL AFFILIATION DECLARATION

This is acknowledgement that you have read, understood and agreed to the Affiliation and Membership policy in the Depository tab.

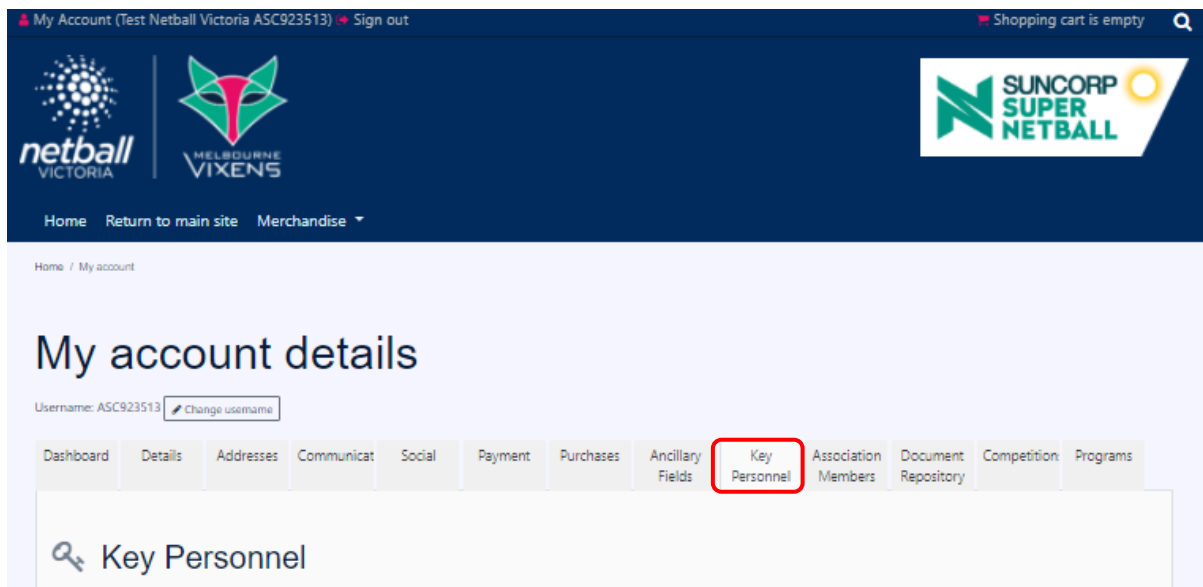
#### FACILITY

We regularly download reports for facility and funding opportunities. We advocate on your behalf with this data, so it is important it is all captured in the CRM.

#### GOVERNANCE

We regularly download reports for facility and funding opportunities. We advocate on your behalf with this data, so it is important it is all captured in the CRM.

**KEY PERSONNEL** – enter the details for various positions within your association/league. Be sure to include details for a Voting Delegate. For important matters you have the right to a vote, and this will ensure invitations go to the right person.



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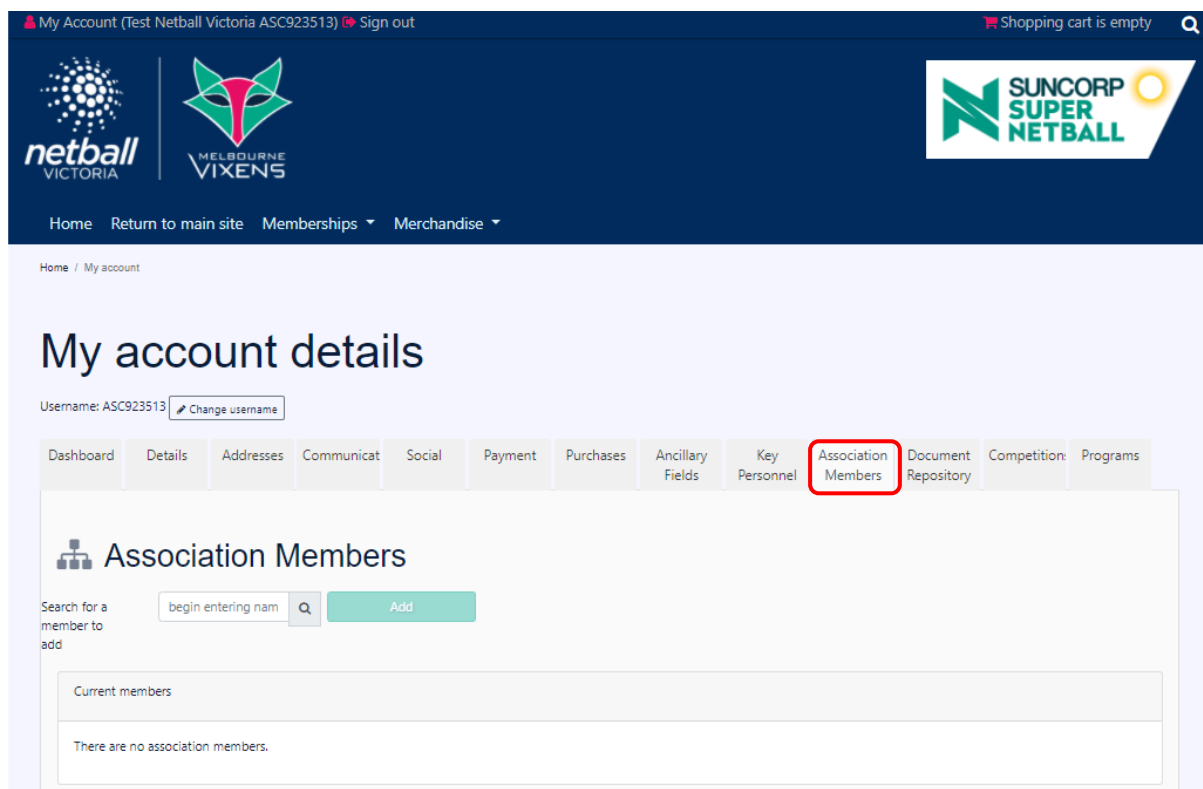
### My account details

Username: ASC923513 [Change username](#)

Dashboard Details Addresses Communicat Social Payment Purchases Ancillary Fields **Key Personnel** Association Members Document Repository Competition Programs

#### Key Personnel

**ASSOCIATION MEMBERS** – Add clubs playing in your competition.



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### My account details

Username: ASC923513 [Change username](#)

Dashboard Details Addresses Communicat Social Payment Purchases Ancillary Fields Key Personnel **Association Members** Document Repository Competition Programs

#### Association Members

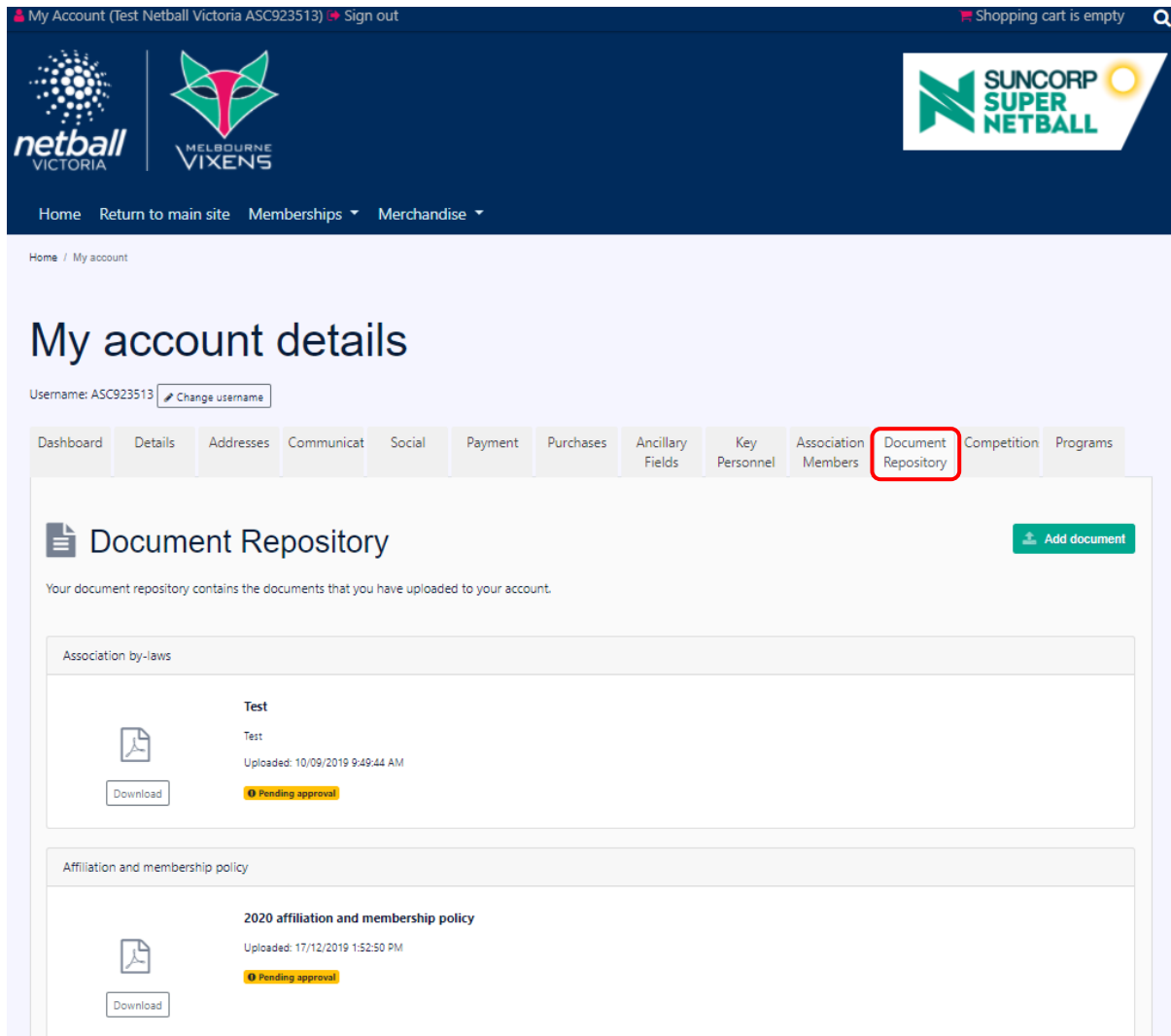
Search for a member to add

Current members


There are no association members.

**DOCUMENT REPOSITORY** – upload your constitution and bylaws.


Netball Victoria documents will also be loaded here, such as the Affiliation and Membership Policy. As an Affiliated member you are required to read, understand and agree the policy. You can do this under the Ancillary Fields tab (see section above).



The screenshot shows the 'My account details' page for a user with the username 'ASC923513'. The 'Document Repository' tab is selected and highlighted with a red box. Below the tab, there is a section titled 'Document Repository' with an 'Add document' button. The repository contains two documents:

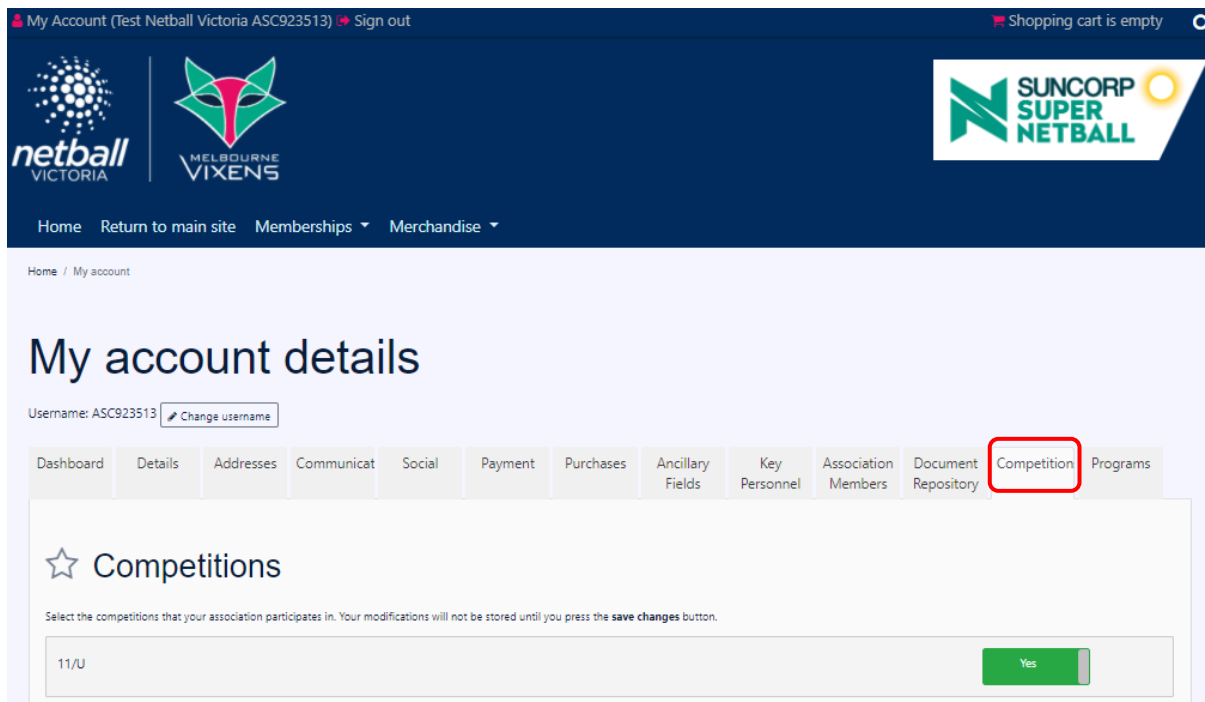
| Association by-laws   |   |
|---|---|
|  | <b>Test</b><br>Test<br>Uploaded: 10/09/2019 9:49:44 AM<br><span>Pending approval</span> |

| Affiliation and membership policy   |   |
|---|---|
|  | <b>2020 affiliation and membership policy</b><br>Uploaded: 17/12/2019 1:52:50 PM<br><span>Pending approval</span> |

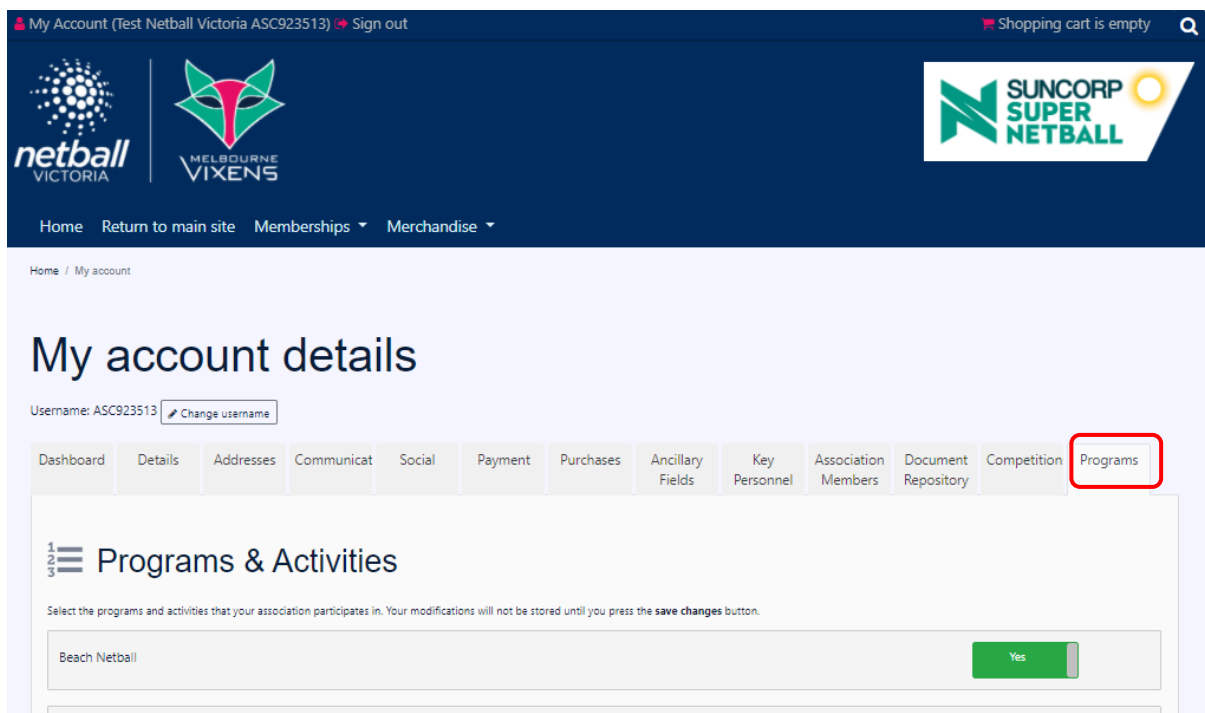


**COMPETITIONS** – Included details of the type of competitions you run.



The screenshot shows the 'My account details' page for a user with the username 'ASC923513'. The 'Competition' tab is highlighted with a red box. Below the tabs, there is a section titled 'Competitions' with a star icon. It includes a sub-header 'Select the competitions that your association participates in. Your modifications will not be stored until you press the **save changes** button.' Below this, there is a table with one row containing the text '11/U' and a green 'Yes' button.

**PROGRAMS** – select the programs and activities your association participates in.



The screenshot shows the 'My account details' page for the same user. The 'Programs' tab is highlighted with a red box. Below the tabs, there is a section titled 'Programs & Activities' with a list icon. It includes a sub-header 'Select the programs and activities that your association participates in. Your modifications will not be stored until you press the **save changes** button.' Below this, there is a table with one row containing the text 'Beach Netball' and a green 'Yes' button.