



# Administrator Toolkit

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## Contents

1. [Dashboard Overview](#)
2. [View current Club or Centre members](#)
3. [Download a detailed report of current Club or Centre Members](#)
4. [Creating a Custom Report for your Club or Centre](#)
5. [Update your Club or Centre membership prices](#)
6. [Issue a Coupon Code](#)
7. [Access Club or Centre financial reports and details](#)
8. [Add & remove administrators/committee members](#)

## Help & Support

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**Please note:** the following guide (and accompanying screenshots) are based on a standard desktop screen size. If you are using a mobile device, laptop or tablet then buttons may be in a slightly different location. We are happy to help where we can to instruct on how to find these on your screen.

**If there is something missing from this toolkit that you would like us to include, on, please feel free to reach out to [rebekah.cullinane@cyclingnewzealand.nz](mailto:rebekah.cullinane@cyclingnewzealand.nz)**

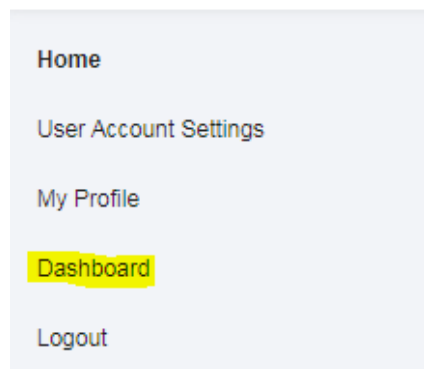
# 1. Dashboard Overview

## Logging in:

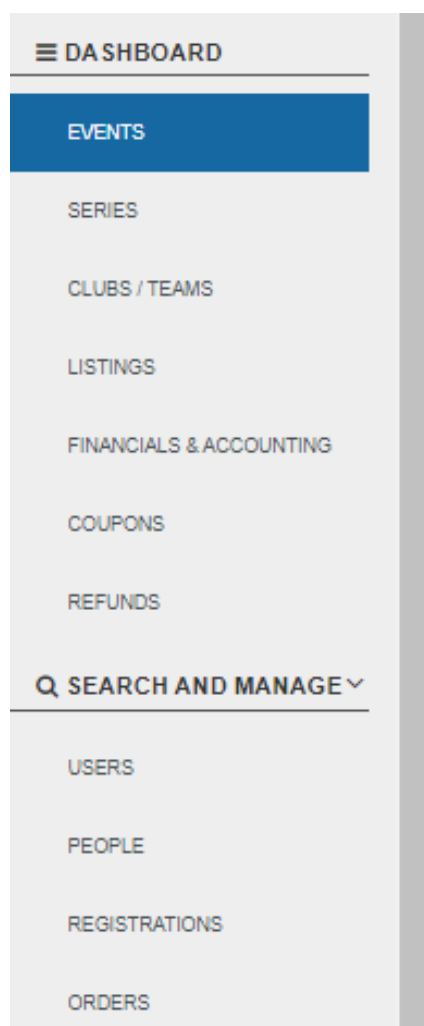
To login, visit the following link and enter the login credentials associated with your account:  
<https://ccnbikes.com/#!/login>

**Note:** If you have not previously logged into this system, you will need to reset your password to gain access.

ccn



Once logged in, **click on the 'Dashboard' button** from the left hand menu.

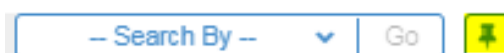


## Dashboard Overview

The Dashboard is where all of your club/centre administrator access sits. Important tabs are:

- Clubs / Teams
- Financials & Accounting
- Coupons
- Registrations

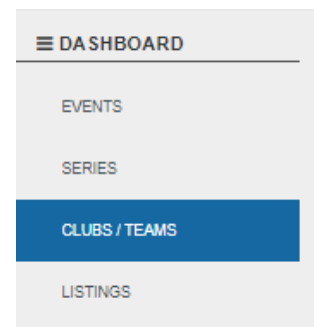
**Any of these tabs can be pinned to your 'Home Page' for easy access in the Dashboard by visiting that tab, and clicking on the 'pin' icon**



## 2. View current Club or Centre members

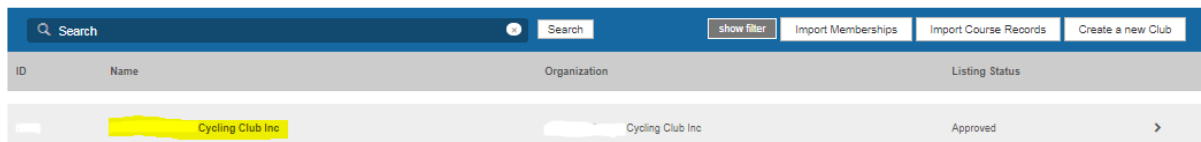
**Tip:** This section will instruct you on how to view individual club or centre members. Useful for looking up Names, Date of Birth, Email Address, Phone Number, and any other information we've collected from the member.

1. From your administrative dashboard, **click on the 'Clubs/Teams' tab** in the left hand side menu

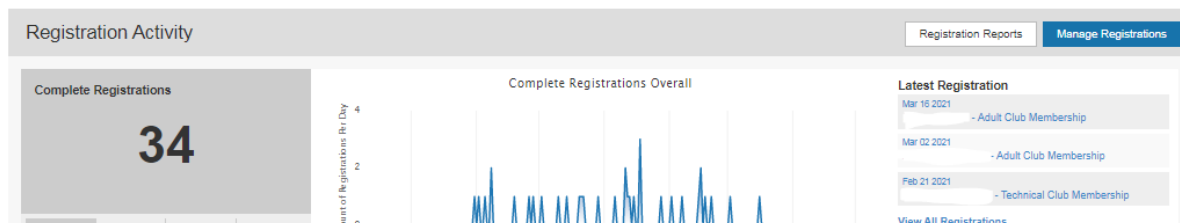
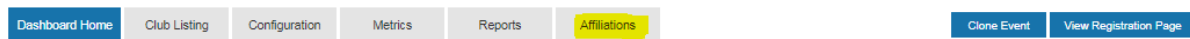


2. **Select your club** (by clicking directly on the club name) from the list of clubs available to you – note if you are an administrator for a club & a centre you will see both here.

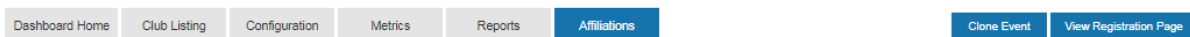
### CLUBS / TEAMS



3. This will then bring up an overview for your club. **Click on the 'Affiliations' tab.**



4. The affiliations tab gives you the total count of members that have a membership with your club/centre, their current licence year status and licence numbers. **You can search for a member, and click on the 'Details' button to view their profile.**

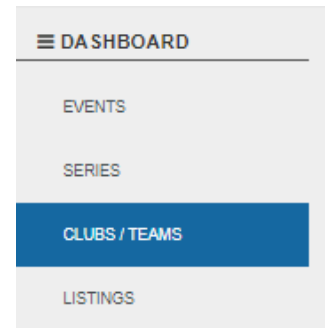


**Tip:** each rider is allocated a NZ licence number, and a UCI ID. Both licence numbers will remain the same across a rider's cycling life - whether as a rider or as an official. The UCI ID enables the UCI to track rider results and rankings, or officials' reports and training. For domestic racing (at club/centre) the NZ licence number is most commonly used to identify riders.

### 3. Download a list of current Club or Centre Members

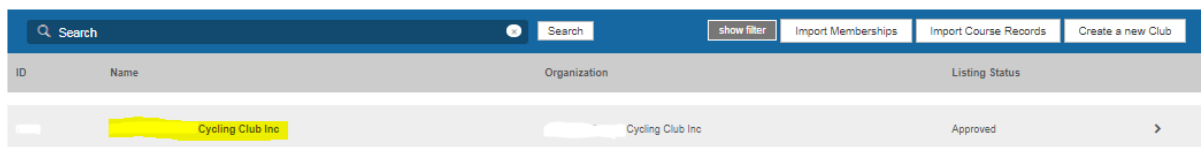
**Tip:** This step highlights the best way to retrieve key information for all of your club members, including licence numbers, contact and personal details, age category.

1. From your Dashboard, **click on the 'Clubs/Teams' tab** from the left hand side menu.



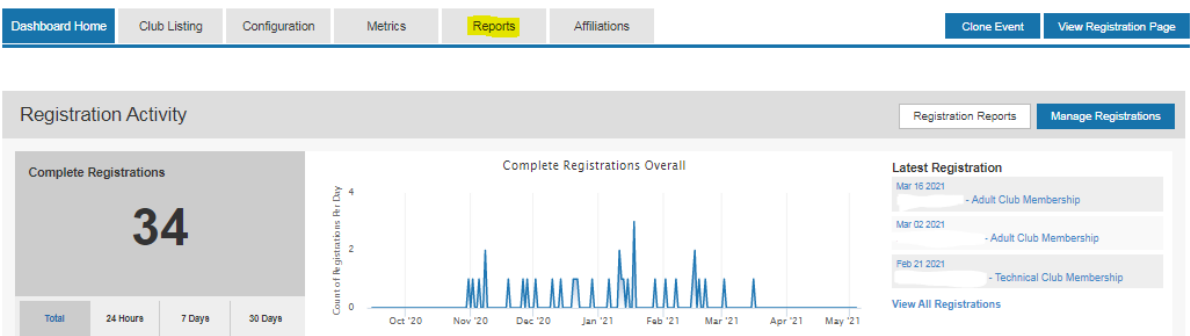
2. **Select your club** (by clicking directly on the club name) from the list of clubs available to you – note if you are an administrator for a club & a centre you will see both here.

#### CLUBS / TEAMS



A screenshot of a web interface showing a table of clubs. The table has columns for ID, Name, Organization, and Listing Status. The first row is highlighted in yellow and contains the text 'Cycling Club Inc' under the Name column and 'Cycling Club Inc' under the Organization column. The Listing Status is 'Approved'. There are search and filter buttons at the top of the table.

3. From here **select the 'Reports' tab**.



4. In this Reports tab you will see a series of Reports available for download, with brief descriptions outlining what they contain. Select the corresponding report that suits the needs of the information you are looking for.

*Instructions continued onto next page...*

5. Select the **"Update"** button on the Report you would like to download (this updates the report to the most up-to-date details/transactions).

Report Title	About	Last Updated		
<a href="#">Complete Registration w/ Membership Info</a>	Complete registrations, including the registrants membership information	17 hours ago	<input type="button" value="Update"/>	<input type="button" value="Download"/>
Complete registrations	Complete registrations only	Never	<input type="button" value="Update"/>	<input type="button" value="Download"/>
Incomplete registrations	Incomplete registrations only	Never	<input type="button" value="Update"/>	<input type="button" value="Download"/>
Refunded registrations	Refunded registrations only	Never	<input type="button" value="Update"/>	<input type="button" value="Download"/>
Cancelled registrations	Cancelled registrations only	Never	<input type="button" value="Update"/>	<input type="button" value="Download"/>
All registrations	All registrations in all statuses	Never	<input type="button" value="Update"/>	<input type="button" value="Download"/>

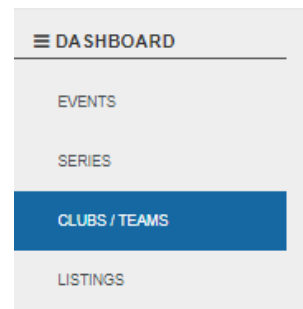
6. Once it has finished updating select the **"Download"** button, this will download the report (as an excel document) to your computer. You will also receive an email notification once this report has been updated – with a link to access the file, too.

**Tip:** some useful reports are:

- Complete Registration w/ Membership Info – this will show all members who are fully licenced and is the most comprehensive way to get all member details
- All registrations – any members who have begun licensing in the system (with the status, incomplete or complete)

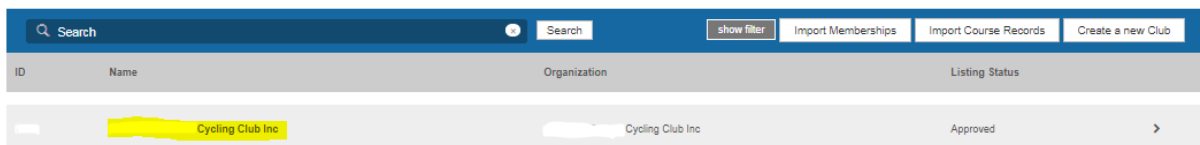
## 4. Creating a Custom Member report for our Club/Centre

1. In the Organiser's Dashboard, **click on the 'Clubs/Teams' tab** from the left hand side menu.



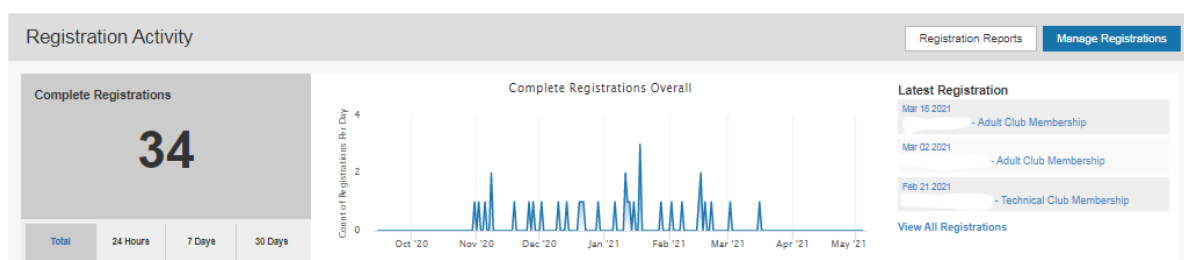
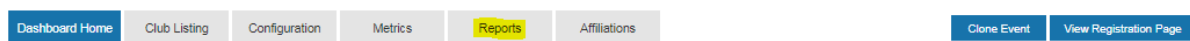
2. **Select your club** (by clicking directly on the club name) from the list of clubs available to you – note if you are an administrator for a club & a centre you will see both here.

### CLUBS / TEAMS

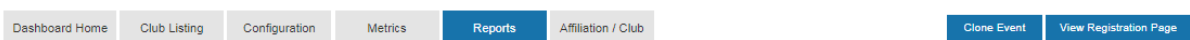


ID	Name	Organization	Listing Status
	Cycling Club Inc	Cycling Club Inc	Approved

3. From here **select the 'Reports' tab**.



4. **Click on the 'Create Custom Report' button**



**!** Click **update** to generate report. You will receive a notification via email once your report is ready for download, click the **update** button to be able to download your reports.

**Create Custom Report**

Instructions continued onto next page...

5. From the dropdown 'Select Report Type to Customize' menu, **select the report 'Complete Registration w/ Membership Info'**

Select Report Type to Customize \*

Complete Registration w/ Membership Info

Select Columns to Include

Column options available [Reset back to default](#)

Click & sort the column in order that you need

Reg ID

Status

Reg Creation Date

Reg Checkout Date

Identity ID

**Last Name**

Email

Sex

DOB

Calculated Age

Address

Move All

**Move Selected Over**

Move Selected Back

Move All Back

First Name

Move Up

Move Down

Remove

Name Your Report \*

Report Description \*

Add a description for this report (less than 200 characters)

Cancel Save

6. From here **select which column you would like to include** (from the left hand list) so it is highlighted blue), and **click 'Move Selected Over' to include it in your Custom Report**. Add all of the column options you need, and once they are showing in the right hand column you can name your report, add a description and save!

**Your report will appear above the list of existing Reports available for download.**

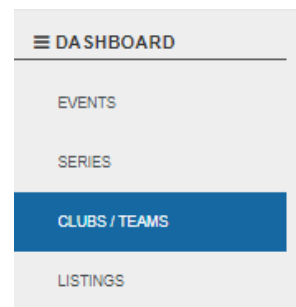
**Tip:** Custom reports can be a great way to generate the exact information you're after on a regular basis, cutting out any unnecessary info!



## 5. Update your club membership prices

The Configuration tab is the key place for administrators to be able to make changes to the information shown when members go to register with your club. In this section you also have the ability to update your club membership prices if & when needed.

1. In the Organiser's Dashboard, **click on the 'Clubs/Teams' tab** from the left hand side menu.

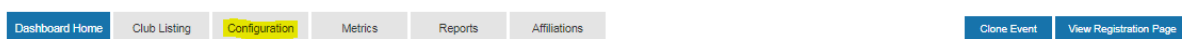


2. **Select your club** (by clicking directly on the club name) from the list of clubs available to you – note if you are an administrator for a club & a centre you will see both here.

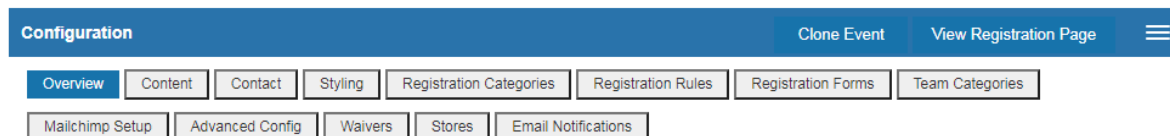
### CLUBS / TEAMS

ID	Name	Organization	Listing Status
	Cycling Club Inc	Cycling Club Inc	Approved

3. This will then take you to your Dashboard Home. **Click on 'Configuration'.**



4. Configuration tab



*Instructions continued onto next page...*

## 5. Click on 'Registration Categories'

Here you will see all of the membership options for your club/centre, along with pricing and any registration 'rules'.

Registration Categories								
Name	Price	Discounts	Status	Gender	Age	Capacity	View/Edit	Delete
TEST 1	\$60.00	-	Open	Not Required	16-100	8	<a href="#">View/Edit</a>	<a href="#">Delete</a>
TEST 2	\$80.00	Early Bird   \$20 from November - 6 to November - 23	Open	Male	16-100	8	<a href="#">View/Edit</a>	<a href="#">Delete</a>

Does this event have an omnium registration option?

## 6. To edit the name, information or price of these categories, click on 'View/Edit'.

This window will allow you to change the price, name, description and parameters of the category. Ensure you hit SAVE when finished making changes to ensure they are applied.

### Adult Club Membership - Category Configuration

**Name**  
Adult Club Membership

**Capacity**  
10000

**Status**  
Open

**Sort Order**  
0

**Restricted By Age**  
 Yes

**Min Age**  
19

**Max Age**  
110

**Restricted By Gender**  
 No

**Choose Gender**  
select

**Adult Club Membership - \$5.00**

**Price**  
5

**Category Price Name**  
Adult Club Membership - \$5.00

**Onsite Advertised Price**  
e.g 30

**ADD DISCOUNT**

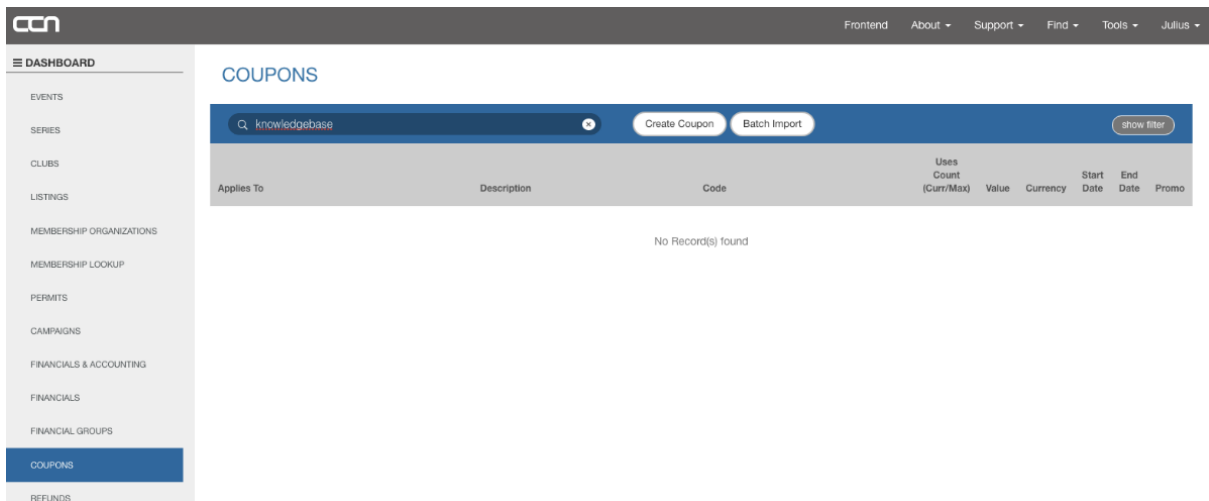
**Save**

**Tip:** setting different parameters around different licence types ensures that each person is registering for the correct membership type. E.g. the maximum age for a 'Youth' Membership is 18, so setting this parameter up ensures only those with a DOB which meets this are eligible.

## 6. Issue a Coupon Code

**Tip:** If a member has paid your club directly for their club fee, generate them a Coupon Code so they are not charged this fee again when registering for their Cycling New Zealand Membership. This can also be useful for issuing to Life Members who may not be charged a club or centre fee!

### 1. Click on Coupons (left margin menu)



### 2. Click on 'Create Coupon'

#### Applies To

#### Your Event/Club *required*

#### Coupon Code *required*

#### Currency *required*

#### Discount By

 Value  Percentage

#### Discount Amount

#### Maximum Uses

#### Current Uses

0

#### Coupon Expiration Date

Absence of an expiration date will set the coupon to have no date restrictions and can be used at any time.

#### Description (will be shown on receipt)

### 3. Set the Parameters of the Coupon

- Set **Applies To** if applicable - ensure this says 'Event/Club'
- Enter **Your Event/Club** - search for the name of your club/centre here
- Enter a relevant **Coupon Code** (case-sensitive) - choose a unique coupon code - this is what you will give to the member to enter at checkout
- Select **Currency** (NZD \$)
- Select **Discount By** value or percentage
- Enter **Discount Amount**
- Set **Maximum Uses** - enter as many uses as required - if this coupon code will be used more than once, ensure you allocated as many 'uses' as needed. This number can be updated as you distribute additional coupon codes
- Select whether coupon expires
- Enter description (optional) - this can help identify the reason for the coupon code (useful for when looking at financial reports!)
- **Promo Code is optional** - leave this blank
- **Create Coupon and send this to the member**

#### Instructions for members using Coupon Codes:

The member eligible for a coupon code should proceed through the registration process as normal, until they reach their Cart/Checkout. In the Cart there is a text box labelled 'Promotion/Coupon Code' - they will need to enter the unique coupon code in this box.

**Note:** codes are case sensitive.

## 7. Access Club Financial Reports & Information

1. **Click on the 'Financials & Account' tab** for detailed financial information regarding funds CCN has collected on your behalf – in this case it will be club fees paid by the member.

**Note:** only the 'Account Holder' and 'Financial Controller' can see these details. See [Add & remove club administrators/committee members](#) for how to assign these rights.

The default tab in this section, 'Cashflow', contains an overview of all funds collected and disbursed to your organization:

The Reports tab will contain all financial reports for your club/centre.

On the far right side of your screen select the "Update" button (This updates the report up to the most recent of transactions). Once it has finished updating select the "Download" button, this will download the report to your computer. You will also receive an email notification once this report has been updated – with a link to access the file, too.

FYI some useful reports are:

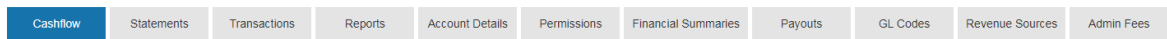
- Complete Transactions – this will show all complete & processed transactions

Financial Reports		
Report Title	About	Last Updated
Complete Transactions	Contains complete transactions only	Never <input type="button" value="Update"/> <input type="button" value="Download"/>
Refunded Transactions	Contains refunded transactions only	Never <input type="button" value="Update"/> <input type="button" value="Download"/>
All Transactions	Contains all transaction in all statuses	Never <input type="button" value="Update"/> <input type="button" value="Download"/>
Refunds	Contains refund information	Never <input type="button" value="Update"/> <input type="button" value="Download"/>
Payout By Category	Contains payout data by category	Never <input type="button" value="Update"/> <input type="button" value="Download"/>

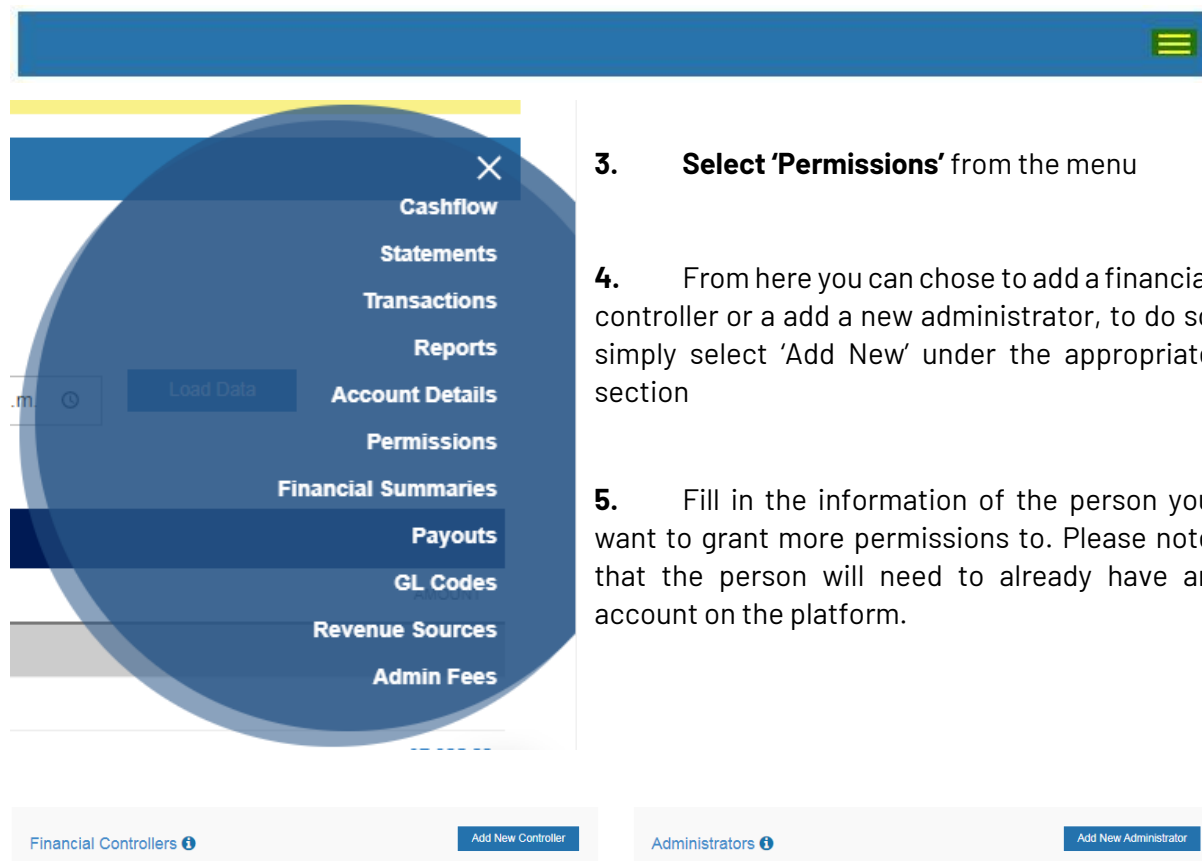
If you or your financial team have questions concerning the financials and accounting section, please contact [billing@interpodia.com](mailto:billing@interpodia.com)

## 8. Add & remove club administrators/committee members

1. Click on the **'Financial & Accounting'** tab.
2. You will see your options for dashboard administration along the top:



Depending on your screen size, you may alternatively view these by clicking on the 3 lines to the right of your screen (example below) - this will then open up a bubble with your menu options.



3. **Select 'Permissions'** from the menu
4. From here you can choose to add a financial controller or add a new administrator, to do so simply select 'Add New' under the appropriate section
5. Fill in the information of the person you want to grant more permissions to. Please note that the person will need to already have an account on the platform.

<b>The financial controller can:</b>	<b>The administrator can:</b>
<ul style="list-style-type: none"><li>✓ View account financials</li><li>✓ Download financial reports</li><li>✓ Receive payout deposit notifications</li></ul>	<ul style="list-style-type: none"><li>✓ View, manage and edit the club registration page</li><li>✓ Manage and edit club registrations</li></ul>

**If you need assistance with account permissions, please email [Rebekah.cullinane@cyclingtonzealand.nz](mailto:Rebekah.cullinane@cyclingtonzealand.nz).**