

GUIDE TO THE VTTA ONLINE MEMBERSHIP SYSTEM

FOR TREASURERS

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JON FAIRCLOUGH

7TH MARCH 2024

AGENDA

- Admin Panel
- Dashboard
- Membership Categories
- Payment Log Filter and Export
- Payment Log Reconciliation



Veterans Time Trials Association

Home News Groups - Events/Results - Standards - Competitions - Records - About -

The Veterans Time Trials Association is for anyone 40 years of age and over who has an interest in cycle racing, and specifically in time trialling.

If you are over 40 and interested in time trialling the VTTA is the organisation for you. We have 3000 members in our 16 regional groups. We promote 100 time trial events a year, 8 national championships, 3 season-long competitions, plus various competitions and trophies at regional level. We also organise individual challenges (called Standard medals) and national age records, and we produce four glossy magazines each year. It costs as little as £14 a year to join.

To join or renew click the 'Join or Renew' button. If you have logged in as an existing member and website user then click on your name and follow the My Profile link.

Please note that membership for the 2020 season is open from 1st October 2019 and your membership will then continue to 31st December 2020.

Quick Links	
Forms	
Find my Standard	
CTT site	
Time Trialling Forum	

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Click on your name to show the drop down with your options

- Admin Panel
- My Profile
- Payment
- History
- Logout
- Select Admin
 Panel

VTTA ONLINE MEMBERSHIP SYSTEM FOR TREASURERS

DADMIN PANEL - DASHBOARD

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📽 VTTA Members						
Donations	Filter	Feeds				Add Feed
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		New style Dashboard	Jon Fairclough	02/02/2020, 18:28	02/02/2020, 18:28	Edit Delete
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Donations	Created By Jon Fairclough					
Payment Logs	Created 07/02/2020, 11:02					
	Modified 07/02/2020, 11:02					
Records <	Description This has been reissued wit	th additional guidance on converting members to HLMs, DLMs and IMVs, Merging Members and Deleting	members. All officials who manage memb	ers should consult it before r	naking changes to the member da	tabase
	Groups this feed is visible to					
Content <	East Anglian					

Use the Dashboard to review the news feed items for officials

Click on each title for more info and use the back button to go back to the dashboard

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MEMBERSHIP CATEGORIES

The table shows the membership categories that exist in the system and how they can be allocated

Membership Category	Acronym	Join?	Add Member?	Comment
Individual Membership	IM	Yes	Yes	Standard
Individual Membership (no Veteran)	IMV	No	Yes	If co-resident with HLM/DLMs
Joint Membership	JM	Yes	Yes	If co-resident
Honorary Life Membership	HLM	No	Yes	Group approves
Distinguished Life Membership	DLM	No	Yes	NEC approves
Life Membership	LM	No	No	Legacy
Joint Life Membership	JMLM	No	No	Legacy

VTTA ONLINE MEMBERSHIP SYSTEM FOR TREASURERS

07/03/2024

MEMBERSHIP FEES

Membership fees are decided by groups who ask a national admin to set it in the membership system.

Membership Category	Fee	Comment
Individual Membership	Set by Group	Includes fee paid to National
Individual Membership (no Veteran)	Set by Group*	Includes fee paid to National
Joint Membership	Set by Group	Includes fee paid to National
Honorary Life Membership	Free	Get the Veteran for free and National makes no charge
Distinguished Life Membership	Free	Get the Veteran for free and National makes no charge
Life Membership	Free	Must buy a subscription to the Veteran if they want it
Joint Life Membership	Free	Must buy a subscription to the Veteran if they want it

* A group may set the IMV fee to a nominal amount (e.g. $\pounds1$) to subsidise it's IMVs

VTTA ONLINE MEMBERSHIP SYSTEM FOR TREASURERS

07/03/2024

PAYMENT LOG

PAYMENT LOG FILTER

PAYMENT LOG EXPORT

VTTA ONLINE MEMBERSHIP SYSTEM FOR TREASURERS

07/03/2024

DAYMENT LOG FILTER

VTTA admin	≡						Jon Fairclough
🖀 Dashboard	Payments						∦ Dashboard > Payments
MEMBERSHIP	Filter	Payments					Export
📽 VTTA Members	Payment status	Devenent Status	Item Amount	Mamban	Devenue of fee	Group	DetaDeta
♥ Donations	Paid ~	paid	620.00	Member	Payment for	London & Homo Counties	18/02/2020 11:22
🍃 Payment Logs	Payment for	paid	£20.00		Individual Membership membership from: 01/01/2020 - 31/12/2020	London & Home Counties	18/02/2020 8:47
RECORDS		paid	£20.00		Individual Membership membership from: 17/02/2020 - 31/12/2020	London & Home Counties	17/02/2020 21:53
🗐 Records 🛛 <	Paid date	paid	£18.00		Individual Membership membership from: 01/01/2020 - 31/12/2020	North Lancs & Lakes	17/02/2020 17:52
CONTENT		paid	£20.00		Individual Membership membership from: 01/01/2020 - 31/12/2020	West	17/02/2020 15:54
🔅 Content 🛛 <	Invoice generated date	paid	£10.00		Standards: Solo Bike: unlimited attempts at any distance	London & Home Counties	17/02/2020 15:45
🏟 News 🗸		paid	£20.00		Individual Membership membership from: 17/02/2020 - 31/12/2020	London & Home Counties	17/02/2020 15:45
🏟 Forms 🛛 <	Filter	paid	£20.00		Individual Membership membership from: 01/01/2020 - 31/12/2020	Scotland	17/02/2020 14:49
🛱 Documents 🗸	\wedge	paid	£20.00	Redacted	Individual Membership membership from: 01/01/2020 - 31/12/2020	London & Home Counties	17/02/2020 13:55
		paid	£20.00		Individual Membership membership from: 17/02/2020 - 31/12/2020	Midlands	17/02/2020 13:45
Seeds <		paid	£10.00		Standards: Solo Bike: unlimited attempts at any distance	Midlands	17/02/2020 13:45
USERS & GROUPS		paid	£14.00		Individual Membership membership from: 01/01/2020 - 31/12/2020	Nottingham & East Midlands	17/02/2020 13:23
le Groups <		paid	£15.00		Individual Membership membership from: 01/01/2020 - 31/12/2020	North	17/02/2020 11:21
S Website Users <		paid	£12.00		Standards: Solo Bike: unlimited attempts at any distance	North	17/02/2020 11:21
Officials <		paid	£16.00		Individual Membership membership from: 01/01/2020 - 31/12/2020	East Anglian	17/02/2020 10:14
🝷 Competitions 🛛 🔍		paid	£13.00		Individual Membership membership from: 01/01/2020 - 31/12/2020	Nottingham & East Midlands	17/02/2020 9:24

Select Payment Logs to view the history of all payments

Click on a member name to go to their member record and view payment record details.

Use the filter options to select what is displayed.

Payment for accepts free text entry, so you can select all standards, lunches etc

07/03/2024

> PAYMENT LOG EXPORT

VTTA admin	≡						Jon Faircloug
🖀 Dashboard	Payments						✿ Dashboard > Paymer
	Filter	Payments					Export
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Donations	Paid ~	Payment Status	Item Amount	Member	Payment for	Group	Paid Date
1 Deursent I e en		paid	£20.00		Individual Membership membership from: 01/01/2020 - 31/12/2020	London & Home Counties	18/02/2020 11:23
	Payment for	paid	£20.00		Individual Membership membership from: 01/01/2020 - 31/12/2020	London & Home Counties	18/02/2020 8:47
		paid	£20.00		Individual Membership membership from: 17/02/2020 - 31/12/2020	London & Home Counties	17/02/2020 21:53
🗐 Records 🔹	Paid date	paid	£18.00		Individual Membership membership from: 01/01/2020 - 31/12/2020	North Lancs & Lakes	17/02/2020 17:52
		paid	£20.00		Individual Membership membership from: 01/01/2020 - 31/12/2020	West	17/02/2020 15:54
🌣 Content 🗸	Invoice generated date	paid	£10.00		Standards: Solo Bike: unlimited attempts at any distance	London & Home Counties	17/02/2020 15:45
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¥ ronns ·		paid	£20.00	Redacted	Individual Membership membership from: 01/01/2020 - 31/12/2020	London & Home Counties	17/02/2020 13:55
Documents •		paid	£20.00		Individual Membership membership from: 17/02/2020 - 31/12/2020	Midlands	17/02/2020 13:45
Feeds .		paid	£10.00		Standards: Solo Bike: unlimited attempts at any distance	Midlands	17/02/2020 13:45
		paid	£14.00		Individual Membership membership from: 01/01/2020 - 31/12/2020	Nottingham & East Midlands	17/02/2020 13:23
Groups		paid	£15.00		Individual Membership membership from: 01/01/2020 - 31/12/2020	North	17/02/2020 11:21
Website Users	< li>	paid	£12.00		Standards: Solo Bike: unlimited attempts at any distance	North	17/02/2020 11:21
• 0#:-:-I-		paid	£16.00		Individual Membership membership from: 01/01/2020 - 31/12/2020	East Anglian	17/02/2020 10:14
		paid	£19.00		Individual Membership membership from: 01/01/2020 - 31/12/2020	Kent	17/02/2020 9:24
P Competitions							

Select Export to download the filtered history of payments to a CSV file for offline analysis

PAYMENT LOG RECONCILIATION

FOR CALCULATING PAYMENTS TO NATIONAL

YOU MAY SKIP THIS PROCESS AND JUST PAY THE INVOICE SENT BY NATIONAL TREASURER

VTTA ONLINE MEMBERSHIP SYSTEM FOR TREASURERS

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• ADMIN PANEL – PAYMENT LOGS

Assumptions

- You have to make quarterly payments to National
- You have a group bank account and can access bank statements
- You have a ledger (e.g. spreadsheet) where you record income and expenditure of your group

VTTA ONLINE MEMBERSHIP SYSTEM FOR TREASURERS

- Suggested Process
 - Go to the NOMS Admin Panel Payments Log and make an export of payments
 - Create filters on all columns in the export
 - Filter on your Group (if necessary) and Payment Method for online payment
 - Identify the bundles of online transactions that relate to payments from Xncreations listed in your bank statement
 - Make a ledger record for each online transaction identifying which member has paid what
 - Filter on your Group (if necessary) and Payment Method for payment by post
 - Make a ledger record for each postal transaction identifying which member has paid what
 - Make a ledger record for each non-NOMS transaction identifying which member has paid what (e.g. cheques sent direct to you with a completed form)
 - Compute the payment to national due for each transaction
 - Reconcile your totals of the national component of subs paid with the invoice sent to you
 - Raise any queries with the National Treasurer
 - Send a cheque to the National Treasurer or make a bank transfer to the National account

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A Dashboard	Payments						✿ Dashboard ≥ Payments
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♥ Donations	Paid ~	Payment Status	Item Amount	Member	Payment for	Group	Paid Date
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🌣 News <		paid	£11.00		Individual Membership membership from: 04/07/2018 - 31/12/2018	Yorkshire	04/07/2018 12:39
🏟 Forms 🔍 🤇	Invoice generated date	paid	£11.00		Individual Membership membership from: 04/07/2018 - 31/12/2018	Nottingham & East Midlands	04/07/2018 12:11
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C Groups C		paid	£16.00	ed	Individual Membership membership from: 04/07/2018 - 31/12/2018	Kent	04/07/2018 10:35
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Officials		paid	£10.00		Standards: Unlimited attempts at any distance	Kent	03/07/2018 13:52
Fivents K		paid	£8.50		Joint Membership membership from: 03/07/2018 - 31/12/2018	Kent	03/07/2018 13:52
https://www.vtta.org.uk/admin/invoice	e-items/export?payment_status=paid	paid	£15.00		Individual Membership membership from: 03/07/2018 -	East Anglian	03/07/2018

Go to the NOMS Admin Panel – Payments Log and make an export of payments

Save the file as a CSV, then open and save as an xlsx so you can retain all changes

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Create filters on all columns in the export by selecting the top row and using the Sort & Filter command

Note identification information has been blanked in this screen shot for security reasons

VTTA ONLINE MEMBERSHIP SYSTEM FOR TREASURERS

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Filter on your Group (if necessary) and Payment Method for online payment

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76 paid	£12.00			Indivi	dual Membership membership	from: 06/0	3/2018 - 31/	12/2018	Surre	ey/Sussex		20180306	o Online payment			92 03/04	4/2018
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78 paid	£12.00			Indivi	dual Membership membership	from: 07/0	3/2018 - 31/	12/2018	Surre	ey/Sussex		20180307	Online payment			92 03/04	/2018
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272 paid	£12.00			Indivi	dual Membership membership	from: 10/04	4/2018 - 31/	12/2018	Surre	ey/Sussex		20180410) Online payment			62 01/05	/2018
281 paid	£12.00			Indivi	dual Membership membership	from: 16/04	4/2018 - 31/	12/2018	Surre	ey/Sussex		20180416	5 Online payment			62 01/05	/2018
282 paid	£12.00			Indivi	dual Membership membership	trom: 17/04	4/2018 - 31/	12/2018	Surre	ey/Sussex		2018041	Online payment			62 01/05	/2018
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Identify the bundles of online transactions that relate to payments from Xncreations listed in your bank statement

See the two columns on the right – on 3/4/2018 Surrey Sussex received a payment of £92 from Xncreations (aka Stripe) covering the yellow bundle

Now make a ledger record for each online transaction identifying which member has paid what

VTTA ONLINE MEMBERSHIP SYSTEM FOR TREASURERS

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Compute the payment to national due for each transaction

See column M in the spreadsheet.

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Filter on your Group (if necessary) and Payment Method for payment by post

Make a ledger record for each postal transaction identifying which member has paid what

VTTA ONLINE MEMBERSHIP SYSTEM FOR TREASURERS

- Make a ledger record for each non-NOMS transaction identifying which member has paid what (e.g. cheques sent direct to you with a completed form)
- Reconcile your calculation with the quarterly invoice
- Raise any queries with the National Treasurer
- Send a cheque to the National Treasurer or make a bank transfer to the National account for the agreed amount

THANK YOU!

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