

# Set Up

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## Introduction

### Quick Answer

- To create a new **Payment Product**, login to your Club Control Panel.
- Click Payments.
- Click the green Add Product button.

Setting up online payments for the first time takes 5 to 10 minutes.

Once setup, creating a new online payment and sending a payment request email to your members takes only a few minutes.

This short guide will take you through the set-up process, this includes:

- **Registering your club bank account** with our partner GoCardless.
- **Creating a new payment product.**
- Collecting **information** with each payment.
- Making your payment product live.

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## GoCardless

To collect payments, Pitchero works together with online payments specialist GoCardless.

GoCardless acts as the payment gateway, moving money between your members' accounts and your club account.

Before a club can use Pitchero payments, they must register with GoCardless. This is free and takes only a few seconds.

### Creating a GoCardless account

To register, access your Club Control Panel and click the 'Payments' tab, then select 'Bank Accounts' from the left-hand menu.

If you have already registered an account, it will be listed on this page. Otherwise, click the grey 'Add Bank Account with GoCardless' button in the center of the page.



Boston United Football Club  
http://www.bostonunited.co.uk/

Need some help? Visit the Help Centre

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Payments

- Products
- Reporting
- Bank Accounts**
- How it Works
- Video Guide
- Fees
- Help / Request Demo

## Bank Accounts

Add Bank Account with GoCardless

**No bank accounts**

You'll need to register your bank account with one of our supported payment providers in order to accept payments in your country.

Add Bank Account with GoCardless

This will take you to the GoCardless website where you can register your bank account.

GOCARDLESS

Already have a GoCardless account? [Sign In](#)

### Create your account

Personal information we use to set up your account

Email address

First name Last name

Choose a password

Minimum of 6 characters

Confirm your password

Confirm password

[Got a referral code?](#)

### Merchant details

Questions about how you'll use GoCardless

Are you a business, a charity or an individual?

Select merchant type

Your name

What your customers will see

To complete the GoCardless registration, you will need the following information:

- Email address
- Name
- Phone number
- Club name
- Club bank details: account name, number, sort code and billing address

Once you have completed your GoCardless registration, your Pitchero club website will be linked to your GoCardless merchant account.

## Business, charity or individual?

GoCardless will ask if you are a business, charity or an individual.

GOCARDLESS

Already have a GoCardless account? [Sign in](#)

**Create your account**  
Personal information we use to set up your account

Email address

First name  Last name

Choose a password  
 Minimum of 6 characters

Confirm your password  
 Confirm password

[Got a referral code?](#)

**Merchant details**  
Questions about how you'll use GoCardless

Are you a business, a charity or an individual?

Your name  
 What your customers will see

If your club does not have a business number or charity number, you should register as an individual.

## Support

If you have a problem registering with GoCardless, please contact Pitchero support: [support@pitchero.com](mailto:support@pitchero.com)

## Products

### What is a Payment Product?

A Payment Product can be anything which requires an online transaction. Examples include:

- Membership fees
- Club subs
- Match fees
- Player fines
- Donations
- Fundraising
- Player sponsorship
- Tour collections
- Match tickets
- Social events

Example membership fee or club subs products could be:

- Annual Adult Player Member 2015/16 - £120 - Single Payment
- Annual Adult Player Member 2015/16 - £10 - Monthly Recurring Payment
- Annual Family Membership 2015/16 - 2 Adults & 2 Children - £150 - Single Payment
- Annual Junior Player Member 2015/16 - £80 - Single Payment

Example donation products could be:

- Donation (With Gift Aid) - £50 - Single Payment
- Donation (With Gift Aid) - £5 - Monthly Recurring Payment

The Payments system is very flexible, allowing clubs to create an unlimited number payment products to meet all of their requirements.

## Creating a Payment Product

To create a new payment product, access your Club Control Panel and click the 'Payments' tab.

On the right-hand side of the page, click the green 'Add Product' button.

The screenshot shows the JS Football Club Club Control Panel. The top navigation bar includes 'Dashboard', 'Site Content', 'Teams', 'Membership', 'Payments', 'Communication', and 'Performance'. The 'Payments' tab is active. Below the navigation bar, there is a 'Getting Started' section with a progress bar showing four steps: '1. Add all of your teams', '2. Design your site', '3. Add some members', and '4. Go Live'. On the left, there is a 'Payments' sidebar with options like 'Products', 'Reporting', 'Bank Accounts', 'How it Works', 'Video Guide', 'Fees', and 'Help / Request Demo'. In the main content area, there is a 'Get Started' section with a green 'Add Product' button. Below this, there is a promotional banner for 'Collect club membership fees online!' with a video player showing a 'SENT' message. To the right of the video, there is a 'Questions? Contact us' section with contact information: 'Most common questions VIDEO', '0845 0176 088', 'Request a callback', 'support@pitchero.com', and 'Book an online demo'.

On the following page, give the product a name and a description. This should be as clear as possible so that your members know exactly which product they are paying for.

Example: 'Junior Annual Membership 11-18 Years'

Select whether the product is a 'Membership Fee' product (e.g. an annual junior membership) or 'Other Payments' product (e.g. a donation or season ticket).

**Select the payment type, either:**

- 'Single payment' - one off, not repeated.
- 'Recurring payment' - repeated; collected daily, weekly, monthly or annually.

If you have chosen 'Single payment', enter the amount you wish to collect, then click 'Save'.

### Add a Payment Product

Name \* Junior Membership 15/16

Description All Junior Membership Fees

Category \*  Membership Fees  
 Other Payments

Payment type  Single payment  
 Recurring payment

Amount \* £ 80.00

If you have chosen 'Recurring payment', enter the amount of the individual payments and the frequency at which you wish to collect them.

Examples of recurring payments are listed below - £15 to be collected every three month, or every quarter.

### Add a Payment Product

Name \* Junior Membership 15/16

Description All Junior Membership Fees

Category \*  Membership Fees  
 Other Payments

Payment type  Single payment  
 Recurring payment

Amount \* £ 15.00 every 3 months

Setup fee £ Taken when subscription is created (irrespective of start date)

Starting  Now  
 On date

Ending  Never  
 On date  
 After

If you wanted the £15 to be collected every month, change the 3 to 1.

Likewise, if you wanted the £15 to be collected every six months, change the 3 to 6.

Setup fee £ £50.00 Taken when subscription is created (irrespective of start date)

Starting  Now  
 On date

Ending  Never  
 On date  
 After

If a one-off 'Setup fee' is required at the start of the recurring payment (e.g. a joining fee), enter the amount in the 'Setup fee' box.

If the payment should start on a specific date, this can be set using the 'Starting' tool.

Likewise, if a recurring payment should end on a specific date, or after a set number of payments, this can be set using the 'Ending' tool.

### Add a Payment Product

Name \* Junior Membership 15/16

Description All Junior Membership Fees

Category \*  Membership Fees  
 Other Payments

Payment type  Single payment  
 Recurring payment

Amount \* £ £80.00

Cancel

Save

Click 'Save' when you are finished. You will then need to create a payment form.

## Payment forms

The 'Payment Form' is used to collect information when the product is purchased.

All of the information collected via the form is stored within the existing Membership database.

If the member has completed some of the information before (e.g. home address, telephone number), that data will be filled in automatically in the payment form.

The member can simply update the stored information if it is incorrect.

## Payment Forms - Group Products

First create the Payment Product as described above.

After setting up the Payment Product, you can specify whether it is a group product or a single product.

- **Group product** - covers more than one club member (e.g. a family membership)
- **Single product** - covers only one member (e.g. an adult membership or a season ticket)

If you select a group product, enter the minimum and maximum number of people that the product will cover. These are the members that will be 'tagged' by this product.

When paying for the product, the paying member will tag all other members that the payment covers by naming them in the "Who are you buying this product for" option.

Admins will also be able to see all members tagged to a product in the reporting areas, to have full visibility of those that have paid as part of a group product.

## Payment Form - Membership Fields

Next you can attach Membership fields to the Payment forms.

You may select any existing membership field or you may add new membership fields. To do this use the Membership Fields tool located within the Membership section of the club control panel.

Example membership fields:

- Home address
- Mobile number
- Name of doctor
- School

The membership fields can be completed by all members covered by the product, or just the person buying the product.



When choosing the 'All members tagged to this product' option, the paying member will be asked to complete all question on behalf of all the members they are tagging to the product.

Selecting 'Only the member buying the product' means the paying member only completes the fields once, which will be stored against the paying members membership record.

## Payment Form - Additional Information

You may also collect further information using one-off additional questions.

Example: If the payment product was a club dinner, you may ask: 'Are you a vegetarian?'

## Payment Form - Gift Aid

Finally you may include an option to collect a Gift Aid declaration.

To learn more about Gift Aid [click here](#).

The Gift Aid declaration may be used by registered charities or clubs with a registered CASC.

If selected the Gift Aid declaration will be added to the bottom of the registration form and stored with the payment information, within the membership database.

A list of members who have completed the declaration can be exported to excel and sent to HMRC.

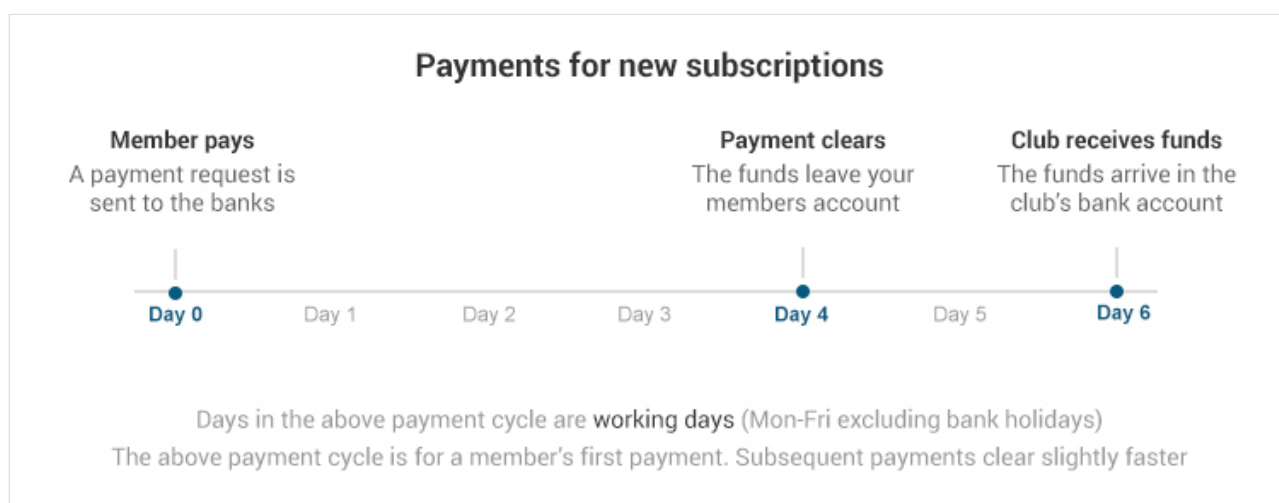
Finally click Save. Your Payment product has been successfully created and will be listed within the website under Payments.

You are now ready to email your members to collect a payment. [Click here](#) to learn more.

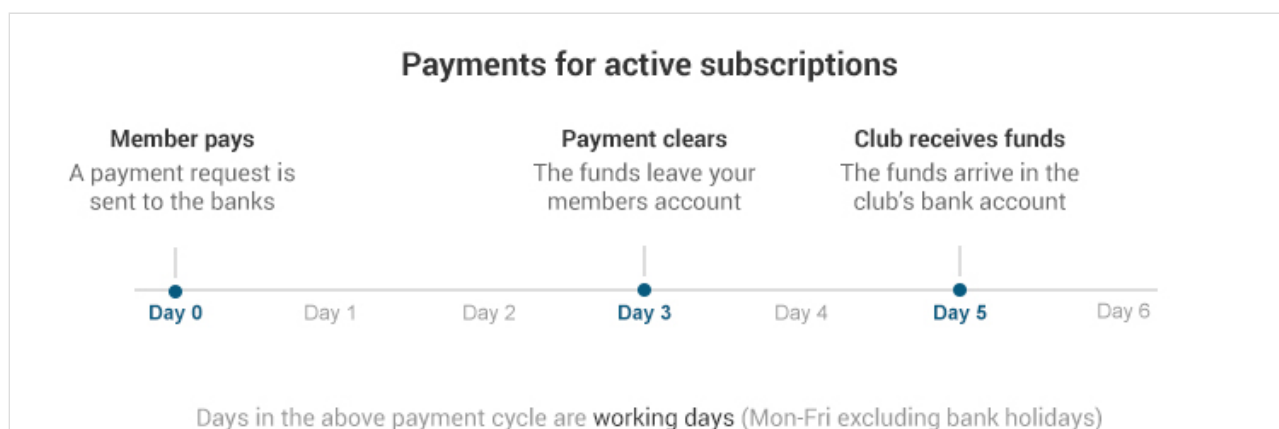
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## Payment Cycle

Payments for a new subscription will take 6 working days to be deposited into the club bank account.



Payments for active subscriptions will only take 5 working days to be deposited into the clubs bank account.





The above payment cycle is for a member's first payment. Subsequent payments clear slightly faster

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