



2023 Annual General  
Meeting and Conference





# FEATURES



**Realtime  
Registrations**



**Automated  
Waitlists**



**Secure  
Payments**



**Attendance  
Tracking**



**Custom  
Reports**



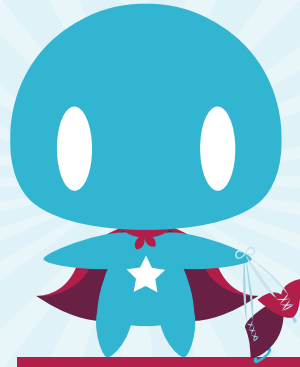
**Class  
Management**



**Mobile Skill  
Evaluations**



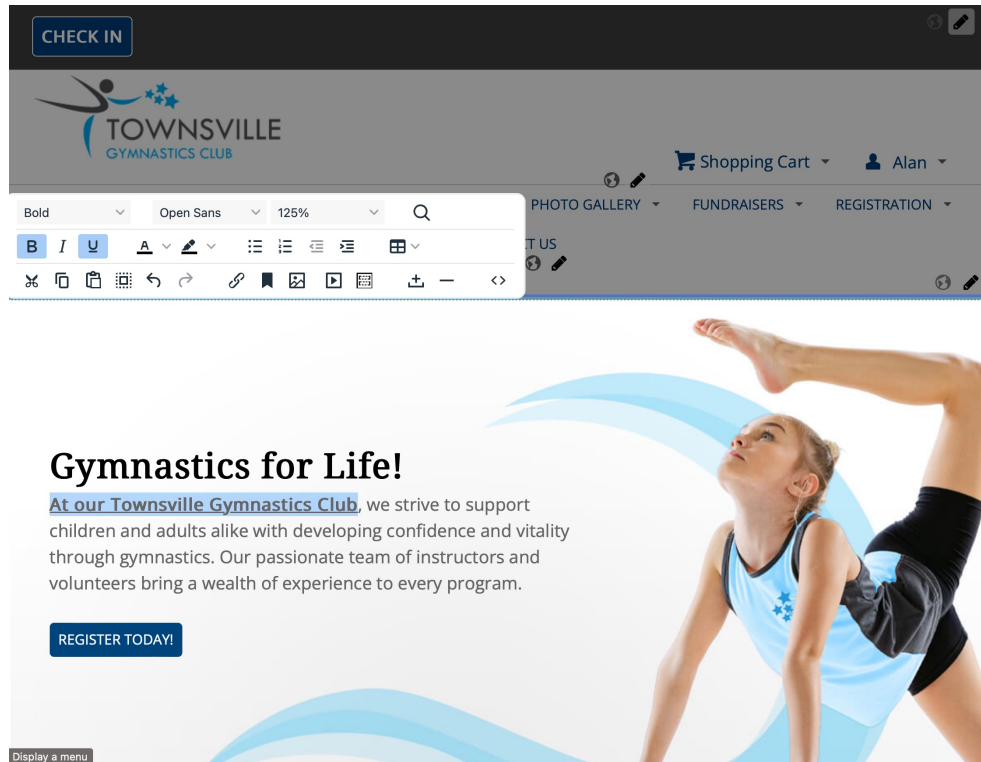
**Email**



Custom Registration Pages  
Submission Tool to GO  
Customizable Policies  
Batch Program Editing  
Installment Tax Options  
Auto-Renewing Fees  
Payment Reconciliation



# Content Management Tools



Uplifter allows you to customize pages with our website management tools to have your entire website managed within your Uplifter site.



# Custom Registration Pages

**TOWNSVILLE GYMNASTICS CLUB**

[+] NEW PAGE ABOUT US PROGRAMS UPCOMING PHOTO GALLERY FUNDRAISERS REGISTRATION NEWS CONTACT US

## Kid's Gymnastics Programs

Nurture a love for gymnastics early with your child!

### Find Programs

Filter the programs in the main area by selecting options from the dropdowns below.

Categories: -- Category Levels: -- Locations: --

Show: All Programs Sort Programs In Each Category Level by: Start Date

### Program Registrations

LIST CALENDAR

#### Kids: Tigers (2-4)

<b>Kids - Tigers Mondays</b> Come join us for this class!	<b>34 EVENTS:</b> Sep 12, 2023 - May 28, 2024 5:30 PM Mondays	<b>\$275.29</b> \$360.00
	<b>LOCATION:</b> Townsville Gymnastics Centre, Zone A	<b>4 spots left</b>
	<b>REGISTRATION BEGINS:</b> April 25, 2023 at 12:00 PM	
	<b>REGISTRATION CUT-OFF:</b> May 30, 2024 at 3:22 PM	

**TOWNSVILLE GYMNASTICS CLUB**

[+] NEW PAGE ABOUT US PROGRAMS UPCOMING PHOTO GALLERY FUNDRAISERS REGISTRATION NEWS CONTACT US

## Kid's Gymnastics Programs

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### Find Programs

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Categories: -- Category Levels: -- Locations: --

Show: All Programs Sort Programs In Each Category Level by: Start Date

### Registration Calendar

November 2023

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1 3:30 PM CanGym Beginner (Age 7 - 12)	2 9:00 AM Kids - Rabbits	3 9:00 AM Kids - Rabbits	4 12:00 PM Kids - Tumbling 101	5 12:00 PM Kids - Crickets Thursdays	6 3:00 AM Kids - Rabbits	7 10:00 AM Kids - Rabbits Mon/Tue/Fri
8 6:30 PM CanGym Intermediate (Age 7 - 12)	9 10:00 AM Kids - Rabbits Mon/Tue/Fri	10 10:00 AM Kids - Rabbits Mon/Tue/Fri	11 5:30 PM Kids - Crickets Mondays	12 5:30 PM Kids - Crickets Mondays	13 5:30 PM Kids - Tigers Mondays	14 12:00 PM Kids - Crickets Fridays
15 5:30 PM CanGym Advanced (Age 7 - 14)	16 5:30 PM Kids - Tigers Mondays	17 5:30 PM Kids - Tigers Mondays	18 5:30 PM Kids - Tigers Mondays	19 5:30 PM Kids - Tigers Mondays	20 5:30 PM Kids - Tigers Mondays	21 5:30 PM Kids - Tigers Mondays
22 5:30 PM Kids - Tigers Mondays	23 5:30 PM Kids - Tigers Mondays	24 5:30 PM Kids - Tigers Mondays	25 5:30 PM Kids - Tigers Mondays	26 5:30 PM Kids - Tigers Mondays	27 5:30 PM Kids - Tigers Mondays	28 5:30 PM Kids - Tigers Mondays
29 5:30 PM Kids - Tigers Mondays	30 5:30 PM Kids - Tigers Mondays	31 5:30 PM Kids - Tigers Mondays	1 5:30 PM Kids - Tigers Mondays	2 5:30 PM Kids - Tigers Mondays	3 5:30 PM Kids - Tigers Mondays	4 5:30 PM Kids - Tigers Mondays

Registration pages can be customized filtering different programs using different registration views including a calendar view option.



## Configure Uplifter Demo Federation Connection

Direct Submissions Available

Uplifter Submission Fields Uplifter Submission SKUs Uplifter Participant Policies

### Uplifter Submission Fields

#### Field Mapping

Select the fields from the left column that you will be submitting to Uplifter. If you would like to submit any of the additional non-required fields on the right to Uplifter, select your according parent, participant or invoice data you would like to map to the submitted data.

#### Your Field → Uplifter Field

- ☒ Participant First Name → First Name \*
- ☒ Participant Last Name → Last Name \*
- ☒ Participant Birthdate → Birthdate \*
- ☒ Participant Gender → Gender \*
- ☒ Townsville # (Custom Participant Field) → Townsville # \*
- ☐ City (Invoice Contact Details) → City
- ☐ Province (Invoice Contact Details) → Province
- ☐ Postal Code (Invoice Contact Details) → Postal Code
- ☐ Email (Invoice Contact Details) → Email
- ☐ Phone Number (Invoice Contact Details) → Phone Number
- ☐ Parent First Name (Invoice Contact Details) → Parent First Name
- ☐ Parent Last Name (Invoice Contact Details) → Parent Last Name

Street Address  
Address (Invoice Contact Details)

Street Address 2

NCCP #

SAVE

#### Uplifter Submission Field Options

Define which Uplifter field options you would like to enable.

#### Uplifter Genders (3)

- Female → Female
- Male → Male
- Other → Other

To update your gender mapping, go to [Uplifter Settings](#)

## Configure Uplifter Demo Federation Connection

Direct Submissions Available

Uplifter Submission Fields Uplifter Submission SKUs Uplifter Participant Policies

### Uplifter Submission SKUs

#### Uplifter SKUs

"Active Season SKUs" can be setup as a subscription that can be purchased by your parents. Once the subscriptions have been purchased, you will have the option to submit these subscription to Uplifter. Additional Uplifter SKUs can be enabled by clicking on the "Activate" icon under the Inactive Season SKUs.

#### Active Season SKUs (15)

SKU Name	Discipline (Weight)	Level (Weight)	Role (Weight)	Price
Judge MAG - Comp	Men's Artistic Gymnastics (1)	Provincial (3)	Judge (2)	\$20.00
Judge MAG - Pre-Comp	Men's Artistic Gymnastics (1)	Inter-club / Invitational (2)	Judge (2)	\$20.00
Judge WAG - Comp	Women's Artistic Gymnastics (1)	Provincial (3)	Judge (2)	\$20.00
Judge WAG - Pre-Comp	Women's Artistic Gymnastics (1)	Inter-club / Invitational (2)	Judge (2)	\$20.00
MAG - Interclub - Level 1 Competitor	Men's Artistic Gymnastics (1)	Inter-club / Invitational (2)	Athlete (3)	\$20.00
Men's - Artistic (Provincial)	Men's Artistic Gymnastics (1)	Provincial (3)	Athlete (3)	\$20.00
Men's - Artistic (Recreational)	Men's Artistic Gymnastics (1)	Recreational (1)	Athlete (3)	\$20.00
Recreational Athlete - 2021-2022	General (1)	Recreational (1)	Athlete (3)	\$20.00
Recreational Athlete - 2022-2023	General (1)	Recreational (1)	Athlete (3)	\$20.00
Recreational Athlete - 2023-2024	General (1)	Recreational (1)	Athlete (3)	\$20.00

#### Uplifter SKU Options

Instead of enabling SKUs explicitly, you can also opt to enable options with the Uplifter SKU lookup dropdowns. Enabling these options will automatically activate any valid SKU option combinations on the left.

#### Uplifter Discipline (3)

- General Weight: 1
- Men's Artistic Gymnastics Weight: 1
- Women's Artistic Gymnastics Weight: 1
- Acro/Aero Weight: 1
- Rhythmic Weight: 1
- Trampoline & Tumbling Weight: 1

#### Uplifter Level (3)

#### Uplifter Role (4)


#### Uplifter Seasons (3)

Clubs on Uplifter can submit their memberships directly to GO from their Uplifter site. Configure the mapping of your data and the specific memberships you want to collect as a club



# Submission Tool to GO

## Subscriptions


☒ This product is a subscription 

**Duration of subscription**

Uplifter Demo Federation Season

Uplifter Demo Federation Season \*

2023-2024

☒  Use this to register membership with Uplifter Demo Federation  
*Only applies to 'Participant' subscriptions*

☒ Charge \$0 if greater or equal weighted Uplifter Demo Federation membership already exists.  
*This can be used to ensure all necessary submissions are maintained without the participant incurring any additional fees.*

☐ Add this subscription for each unique combination of Uplifter Demo Federation Discipline, Level, Role  
*This can be used when relying on inheritance from program/category/category level selections instead of the selections below.*

—

✓ General [Weight: 1]

Men's Artistic Gymnastics [Weight: 1]

Women's Artistic Gymnastics [Weight: 1]

Uplifter Demo Federation Level

Recreational [Weight: 1]

Uplifter Demo Federation Role

Athlete [Weight: 3]

[Uplifter Demo Federation Connection configuration page.](#)

Changes to the above settings will result in any existing unprocessed signups for this product to be updated, and marked processed if an existing signup exists from Uplifter Demo Federation.

With each of your memberships, setup the specific discipline, level and role you would like to capture as part of your membership fee collected. Uplifter can also easily manage only charging members for the “highest fee paid.”



# Submission Tool to GO

## Uplifter Demo Federation Submissions

This page lists all participants who have purchased a Uplifter Demo Federation Membership from your club. These memberships are ready to be submitted to Uplifter Demo Federation at your discretion.

- You do not have any email addresses with 'Receives System Notifications' enabled. You will need to check back here periodically in case of errors with your submissions to Uplifter Demo Federation.

Legend: <span>Pending Submission</span> <span>Already submitted by another club</span> <span>Already submitted with this club</span> <span>Removed</span> <span>Submitted</span>							
	<input checked="" type="checkbox"/>	First Name	Last Name	Gender	Uplifter SKU Lookup [Discipline]	Uplifter SKU Lookup [Level]	Uplifter SKU Lookup [Role]
1	<input checked="" type="checkbox"/>	Molly	Bellew	Female	en's Artistic Gymnastics	Recreational	Athlete
2	<input checked="" type="checkbox"/>	Catherine	Underwood	Female	eneral	Recreational	Athlete
3	<input checked="" type="checkbox"/>	Abby	Underwood	Female	eneral	Recreational	Athlete

SUBMIT

☒ Include Only Checked Submissions ☐ Export Submission

Once your registrations are completed and you've collected your GO memberships, submit them directly to GO using the GO Submission tool directly from your Uplifter site without having to export reports and import them into GO. Submissions are processed nightly.





## Townsville League - COVID-19 Waiver - Acknowledgement of Assumption of Risk

You must read the entire policy prior to accepting it.

Preview Only: Test Ages

Participant Age

15

I,

, being the parent / legal guardian of  (herein "my child"), hereby acknowledge and agree the following Waiver and Assumption of Risk.

By entering my initials, I acknowledge that I have read and agree to the below.

In consideration of the participation of  in gymnastics and physical activities organized by the Townsville League and Townsville Gymnastics:

- I acknowledge that the World Health Organization has classified the Coronavirus Disease ("COVID-19") outbreak as a global pandemic and am/are aware of the risks of COVID-19. I specifically acknowledge and agree that I am/we are aware of the risks to personal health, including by the failure to follow physical distancing protocols, flowing from COVID-19, and that I am/we are assuming, on my own behalf and, if signing on behalf of a participant under 18 years, on their behalf, all health risks and adverse health-related consequences caused by or arising from engaging in any Activities (the "Assumed Risks").
- I acknowledge that the Organizers are implementing the Return to Play Protocols ("Protocols") the most recent version of which will be posted from time to time on Townsville Gymnastics' website. I specifically acknowledge and agree that I am/we are aware of Protocols, that I will abide by the Protocols, and that the Protocols are subject to all federal, provincial and municipal laws, regulations, by-laws and orders as they may exist from time to time.
- I hereby release the Organizers, their members, officers, directors, employees, independent contractors, agents, and volunteers ("Releasees") from all liability, recourse, proceedings, claims, and causes of action of any kind whatsoever, in respect of all damages, personal injuries, death, or property losses which I may suffer arising out of or connected with the Assumed Risks, the content or implementation of the Protocols (including without limitation the conduct of any screening of any individual), and the preparation for, or participation in, the Activities, notwithstanding that any such losses were caused solely or partly by the negligence of any of the Releasees.
- I do hereby agree to indemnify and hold harmless the Releasees from any and all damages or losses of any kind as a result of any and all claims, demands, causes of action of any kind whatsoever including those involving negligence on the part of any of the Releasees that may be made or initiated by, or on behalf of my/our child, arising out of or connected with the Assumed Risks as they relate to me/us and/or my/our child, the content or implementation of the Protocols as they relate to me/us and/or my/our child, and my/our child's preparation for and/or participation in any of the Activities.
- And, I hereby acknowledge and agree:
  - (a) that I understand that none of the Releasees assumes any responsibility whatsoever for my safety or the safety of my/our child during the course of any preparation for or participation in the aforesaid Activities;
  - (b) that I will comply with the implementation of the Protocols and that any failure on my/our part (or on the part of my/our child) to comply with the Protocols and their implementation may have consequences (including without limitation a withdrawal of permission for me or my/our child to participate in an Activity or Activities) and could jeopardize relevant insurance coverage;
  - (c) that I understand that the implementation of the Protocols may involve the collection, use and disclosure of personal information about me or my/our child and I consent to same;
  - (d) that I have carefully read this ACKNOWLEDGEMENT, RELEASE, INDEMNITY, AND ASSUMPTION OF RISK that I fully understand same, and that I am/we are freely and voluntarily executing same;
  - (e) that I have been given the opportunity and that I am encouraged to seek independent legal advice prior to signing this document;
  - (f) that I understand that the Organizers would not permit me or my/our child to participate in any Activities unless I signed this ACKNOWLEDGEMENT, RELEASE, INDEMNITY, AND ASSUMPTION OF RISK, which applies to all Activities whether occurring in the near or distant future and that the terms of this document need not be brought to my attention each time I participate in a Program in order for it to be effective;
  - (g) that the term Activities as used herein includes, without limiting the generality of that term, training sessions, clinics, and events that are in any way authorized, sanctioned, organized or operated by any of the Organizers on its own or together with another, or to which Townsville Gymnastics has issued a permit;

This policy will be valid to Dec 31, 2022.

ACCEPT

SAVE & CLOSE

REJECT

# Customizable Policies

## Townsville League - COVID-19 Waiver - Acknowledgement of Assumption of Risk

You must read the entire policy prior to accepting it.

Preview Only: Test Ages

Participant Age

19

I,  , hereby acknowledge and agree to the following Waiver and Assumption of Risk.

By entering my initials, I acknowledge that I have read and agree to the below.

In consideration of my participation in gymnastics and physical activities organized by the Townsville League and Townsville Gymnastics:

- I acknowledge that the World Health Organization has classified the Coronavirus Disease ("COVID-19") outbreak as a global pandemic and am/are aware of the risks of COVID-19. I specifically acknowledge and agree that I am/we are aware of the risks to personal health, including by the failure to follow physical distancing protocols, flowing from COVID-19, and that I am/we are assuming, on my own behalf and, if signing on behalf of a participant under 18 years, on their behalf, all health risks and adverse health-related consequences caused by or arising from engaging in any Activities (the "Assumed Risks").
- I acknowledge that the Organizers are implementing the Return to Play Protocols ("Protocols") the most recent version of which will be posted from time to time on Townsville Gymnastics' website. I specifically acknowledge and agree that I am/we are aware of Protocols, that I will abide by the Protocols, and that the Protocols are subject to all federal, provincial and municipal laws, regulations, by-laws and orders as they may exist from time to time.
- I hereby release the Organizers, their members, officers, directors, employees, independent contractors, agents, and volunteers ("Releasees") from all liability, recourse, proceedings, claims, and causes of action of any kind whatsoever, in respect of all damages, personal injuries, death, or property losses which I may suffer arising out of or connected with the Assumed Risks, the content or implementation of the Protocols (including without limitation the conduct of any screening of any individual), and the preparation for, or participation in, the Activities, notwithstanding that any such losses were caused solely or partly by the negligence of any of the Releasees.
- I do hereby agree to indemnify and hold harmless the Releasees from any and all damages or losses of any kind as a result of any and all claims, demands, causes of action of any kind whatsoever including those involving negligence on the part of any of the Releasees that may be made or initiated by, or on behalf of my/our child, arising out of or connected with the Assumed Risks as they relate to me/us and/or my/our child, the content or implementation of the Protocols as they relate to me/us and/or my/our child, and my/our child's preparation for and/or participation in any of the Activities.
- And, I hereby acknowledge and agree:
  - (a) that I understand that none of the Releasees assumes any responsibility whatsoever for my safety or the safety of my/our child during the course of any preparation for or participation in the aforesaid Activities;
  - (b) that I will comply with the implementation of the Protocols and that any failure on my/our part (or on the part of my/our child) to comply with the Protocols and their implementation may have consequences (including without limitation a withdrawal of permission for me or my/our child to participate in an Activity or Activities) and could jeopardize relevant insurance coverage;
  - (c) that I understand that the implementation of the Protocols may involve the collection, use and disclosure of personal information about me or my/our child and I consent to same;
  - (d) that I have carefully read this ACKNOWLEDGEMENT, RELEASE, INDEMNITY, AND ASSUMPTION OF RISK that I fully understand same, and that I am/we are freely and

Create customizable policies and recategorize them as waivers or acknowledgements as it suits you. Customize fillable form fields that dynamically change based on the participant's age to collect the exact required digital acknowledgement during registration.



# Batch Program Editing

Batch Edit Programs

Filtered Programs (27)

Duplicate Selected Program(s)

Remove Selected Program(s)

Programs not saved yet

	Update ?	Visibility ?	Program Name	Status ?	Program SKU ?	Program Description	Hide from Site Search ?	Hide this program from the public calendars and regi
1							<input checked="" type="checkbox"/>	<input type="checkbox"/>
2	<input type="checkbox"/>		Men's - Recreational	Public	FW23-24.M.R	Come join us for this class!	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3	<input type="checkbox"/>		Men's - Intermediate	Public	FW23-24.M.I	Come join us for this class!	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4	<input type="checkbox"/>		Men's - Advanced	Public	FW23-24.M.A	Come join us for this class!	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5	<input type="checkbox"/>		Women's - Beginner	Public	FW23-24.W.B	Come join us for this class!	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6	<input type="checkbox"/>		Women's - Intermediate	Public	FW23-24.W.i	Come join us for this class!	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7	<input type="checkbox"/>		Women's - Advanced	Public	FW23-24.W.A	Come join us for this class!	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8	<input type="checkbox"/>		Women's - Recreational	Public	FW23-24.W.R	Come join us for this class!	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9	<input type="checkbox"/>		Trampoline & Tumbling	Public	FW23-24.TT.Men	Come join us for this class!	<input checked="" type="checkbox"/>	<input type="checkbox"/>
10	<input type="checkbox"/>		Trampoline & Tumbling (Girls Only)	Public	FW23-24.TT.G	Come join us for this class!	<input checked="" type="checkbox"/>	<input type="checkbox"/>
11	<input type="checkbox"/>		Men's - Acrobatics	Public	FW23-24.M.Ac	Come join us for this class!	<input checked="" type="checkbox"/>	<input type="checkbox"/>
12	<input type="checkbox"/>		Women's - Acrobatics	Public	FW23-24.W.Ac	Come join us for this class!	<input checked="" type="checkbox"/>	<input type="checkbox"/>
13	<input type="checkbox"/>		Kids - Tumbling 101	Public	FW23-24.KT101	Join us for some spring fun and ...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
14	<input type="checkbox"/>		Kids - Cricket Mondays	Public	FW23-24.K.C.M	Come join us for this class!	<input checked="" type="checkbox"/>	<input type="checkbox"/>
15	<input type="checkbox"/>		Kids - Crickets Thursdays	Public	FW23-24.K.C.T	Come join us for this class!	<input checked="" type="checkbox"/>	<input type="checkbox"/>
16	<input type="checkbox"/>		Kids - Rabbits	Public	FW23-24.K.R.W	Come join us for this class!	<input checked="" type="checkbox"/>	<input type="checkbox"/>
17	<input type="checkbox"/>		Kids - Rabbits Mon/Tue/Fri	Public	FW23-24.K.R.T	Come join us for this class!	<input checked="" type="checkbox"/>	<input type="checkbox"/>
18	<input type="checkbox"/>		Kids - Crickets Friday	Public	FW23-24.K.C.F	Come join us for this class!	<input checked="" type="checkbox"/>	<input type="checkbox"/>
19	<input type="checkbox"/>		CanGym Beginner I (Age 7 - 12)	Public	FW23-24.C.G.B1	CanGym Beginner 1 program is ...	<input checked="" type="checkbox"/>	<input type="checkbox"/>
20	<input type="checkbox"/>		CanGym Intermediate (Ane 7 - 12)	Public	FW23-24.C.G.I	CanGym Intermediate program	<input checked="" type="checkbox"/>	<input type="checkbox"/>

UPDATE

Easily update program registration information on aggregate using Uplifter's Batch Program Editing tools. Copy and paste multiple programs at a time to easily create your registration season.



# Saved Reports

The screenshot displays the Uplifter web interface. At the top, there are three main report sections: "Payments - Overdue", "Payments - Paid Receipts Summary", and "Payments - Policy Summary". Each section has a title, a brief description, and a search icon in the top right corner. A red rectangular box highlights a sidebar on the left side of the interface, titled "Saved Reports". This sidebar contains three items: "All Payment Receipts - Last Month", "Bank Deposit Payments - Last Month", and "Credit Card Transactions - Previous Month". Each item in the sidebar has a question mark icon to its right. The background of the interface is light gray with a repeating "LIVE" watermark.

**Payments - Overdue**

List all pending payments that are overdue. Payments will be considered overdue after the Default Terms (in days) have elapsed as specified in your Global Settings. Filterable by Payment Time, season, category, category level or program.

**Payments - Paid Receipts Summary**

List of paid payments with their at-time-of-report details. This includes invoice number, billing information, and columns breaking out the attributable revenue. Revenue can be grouped by type, category, category level, SKU or ledger account. Filterable by payment method, payment processing time, invoice number and refund status. This report will not report attributable revenue for refunds and is subject to rounding inaccuracies. Attributable revenue to refunds, and results not subject to rounding inaccuracies, can be found in the Ledger Report. The Ledger Account group filtering option is only available if your Ledger is

**Saved Reports**

- All Payment Receipts - Last Month ?
- Bank Deposit Payments - Last Month ?
- Credit Card Transactions - Previous Month ?

Provides a list of all policies setup within Uplifter. Filterable by policy name and whether the policy is active

Create Saved Reports to access often used information easily.



# All Payment Receipts – Last Month

## Payments - Paid Receipts Summary

List of paid payments with their at-time-of-report details. This includes invoice number, billing information, and columns breaking out the attributable revenue. Revenue can be grouped by type, category, category level, SKU or ledger account. Filterable by payment method, payment processing time, invoice number and refund status. This report will not report attributable revenue for refunds and is subject to rounding inaccuracies. Attributable revenue to refunds, and results not subject to rounding inaccuracies, can be found in the Ledger Report. The Ledger Account group filtering option is only available if your Ledger is active.

### Filter Report By

Payment Transaction Processed Date From

1st day of last month

**September 1, 2023**



Payment Transaction Processed Date To

last day of last month

**September 30, 2023**



Filter by Payment Type

☐ Cheque

☐ Credit Card

☐ Gift Certificate

☐ Cash



# All Payment Receipts – Last Month

**Filter Report By**

Payment Transaction Processed Date From

1st day of last month

September 1, 2023

Payment Transaction Processed Date To

last day of last month

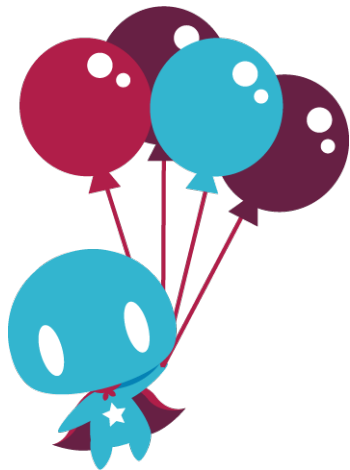
September 30, 2023

Reports that offer date range filters will allow for **Relative Terms.**

Relative Terms are based on the date you are filtering your report on.



# Relative Terms



## Days

Now  
Today  
Tomorrow  
Last Monday

## Weeks

Next Week  
Last Week  
-2 Weeks  
+1 Week

## Months

First Day of This Month  
Last Day of This Month  
First Day of Last Month  
Last Day of Last Month



# Installment Tax Distribution

**Taxes**

Calculate Taxes and

- ☒ Charge at Checkout
- ☐ Charge on First Payment
- ☐ Distribute Evenly on Payments

Tax Name	Tax Rate	Default on Classes	Default on Products	Default on Subscriptions	Default on Custom Lines	
Goods & Services Tax (GST)	5%	<input type="checkbox"/> Reapply	<input type="checkbox"/> Reapply	No <input type="checkbox"/> Reapply	No	
Goods and Services Tax (GST)	5%	<input type="checkbox"/> Reapply	<input type="checkbox"/> Reapply	Yes <input type="checkbox"/> Reapply	Yes	

For clubs that charge tax and like to use installment payments, opt to distribute your taxes in various methods on installment at time of checkout.



# Auto Renewing Fees

Auto-Renewing Fees help clubs 'set and forget' recurring fees and costs.

This automates the process and reduces the chance of missing important fees.

Best for use with Cash Based Accounting instead of installments.





# Auto Renewing Fees

☐ Full Program Fee ?

☐ Payment Installment Option ?

☒ Auto-Renew Fee ?

**Pricing Structure ? \***  
Calculated Per Event

**Per Event Fee: \***  
\$ 25.00

**Fee Description: ?**  
per month

Total Program Price: \$250.00

**Renewal Billing Period ? \***  
first day of next month

**Stop Renewing Fees After**  
Program Ends

Example expiry date if item was purchased today:  
**November 1, 2023**

**Default Payment Method \***  
Credit Card

☒ Automatically Send Email Receipt

☒ Use Available Credit  
All available gift certificates will be used before attempting to use any other payment method.

☒ Reuse Previous Invoice Payment Details  
Priority will be given to the most recently paid invoice. If none are found, Uplifter will then attempt to find the first pending payment before using the default method. Gift Certificate payments will be ignored.

☐ Enable Prorating



# Auto Renewing Fees

## Upcoming Updates

Credit Card information collection for \$0 first invoice

More custom options for Billing Period

Ability for different Billing Date vs Billing Period

☐ Full Program Fee ?

☐ Payment Installment Option ?

☒ Auto-Renew Fee ?

Pricing Structure ? \*

Calculated Per Event v

Per Event Fee: \*

\$ 20.00

Fee Description: ?

Total Program Price: \$440.00

Renewal Monthly ?

Billing Period Starts On

- ☐ Program Start Date
- ☐ Checkout Date
- ☒ Day 1 v of the month

Billing Period Length

1 v month(s)

Invoice Generation

- ☐ Billing Period Start
- ☐ 1 v days before billing period starts
- ☒ Previous 25 v day of the month

First Invoice Generation

- ☐ At Checkout
- ☒ According to Invoice Generation
- ☐ On

Stop Renewing Fees After

Program Ends v

Invoice Schedule Preview with Checkout Date:



Invoiced on	Billing Period Start	Billing Period End	Price
2023-06-15	2023-06-15	2023-08-31	\$0.00
2023-08-25	2023-09-01	2023-09-30	\$80.00
2023-09-25	2023-10-01	2023-10-31	\$80.00
2023-10-25	2023-11-01	2023-11-30	\$100.00
2023-11-25	2023-12-01	2023-12-31	\$80.00
2023-12-25	2024-01-01	2024-01-31	\$100.00



# Payment Reconciliation Report

A new “Payments – Reconciled Revenue” report provides details of how payments are distributed.

This is an updated version of the Paid Payments Receipts Report with more data and refunds included.

You’ll now be able to see the exact amounts of revenue that goes into the category, or SKU, or ledger account even on updated invoices or refunds



# Payment Reconciliation Report

## Report Preview

Records found: 12

	Invoice Payment Amount	Payment Amount	Ref Number	Invoice Number(s)	Transaction Time	300 Default Revenue Revenue	302 Product / Subscriptions Revenue	350 Recreational Revenue	35
1	- \$219.00	- \$219.00	00001021	00003412	2022-07-20 10:38 AM	\$0.00	\$0.00	\$0.00	
2	- \$10.00	- \$10.00	00001032	00003444	2023-06-12 12:43 PM	\$0.00	\$0.00	- \$10.00	
3	- \$50.00	- \$50.00	00001034	00003502	2023-07-05 12:19 PM	\$33.33	- \$83.34	\$0.01	
4	- \$182.00	- \$182.00	00001031	00003659	2023-06-12 12:39 PM	\$0.00	\$0.00	- \$182.00	
5	\$80.00	\$80.00	00001030	00003739	2023-05-01 4:00 AM	\$80.00	\$0.00	\$0.00	
6	\$160.00	\$160.00	00001044	00003824	2023-07-14 3:08 PM	\$0.00	\$100.00	\$60.00	
7	\$730.50	\$730.50	00001046	00003844	2023-09-13 4:39 PM	\$0.00	\$50.00	\$680.50	
8	\$536.00	\$536.00	00001047	00003845	2023-09-13 4:44 PM	\$0.00	\$50.00	\$486.00	
9	\$856.95	\$856.95	00001048	00003846	2023-09-13 4:46 PM	- \$68.05	\$50.00	\$875.00	
10	\$90.00	\$90.00	00001049	00003847	2023-09-13 4:48 PM	\$0.00	\$50.00	\$40.00	
11	\$80.00	\$80.00	00001057	00003872	2023-10-01 4:00 AM	\$0.00	\$0.00	\$80.00	
12	-	-		00003931		\$0.00	\$25.00	\$100.00	
13	\$2,072.45	-				\$45.28	\$241.66	\$2,129.51	

Payments are listed with all attributable revenues in summarized columns for each category, SKU or ledger account



# Payment Reconciliation Tool


Revenue and Tax allocation is done automatically by Uplifter.

Admins will be able to manually allocate revenue and taxes for invoices with changes made after checkout.



# Payment Reconciliation Report
















## Invoice Payment Revenue Reconciliation

Invoice #: 00003468 

Invoice Date: May 4, 2022 at 10:29 AM

Parent Account: **Brent Berry**

Billing Name: Brent Berry

Legend:  Total  Total (locked)  Unallocated  Unallocated (locked)  Allocated  Allocated (locked)  Has All						
		Payments 	2022-05-04 Pending (E-Transfer)	2022-09-15 Pending (E-Transfer)	2023-01-15 Pending (E-Transfer)	
	TOTALS		\$100.00	\$175.00	\$175.00	
Items 		UNALLOCATED				
FW22-23:KT101 (Meghan Berry) 	\$400.00		\$50.00 	\$175.00 	\$175.00 	
22-23:InsurFee (Meghan Berry) 	\$50.00		\$50.00 	\$0.00	\$0.00	


SAVE

Uplifter now tracks the relationship between each payment and how it attributes to specific



# Payment Reconciliation Tool








## Invoice Payment Revenue Reconciliation

Invoice #: 00003468 





Invoice Date: May 4, 2022 at 10:29 AM

Parent Account: **Brent Berry**

Billing Name: Brent Berry

Legend:  Total  Total (locked)  Unallocated  Unallocated (locked)  Allocated  Allocated (locked)  Has All						
		Payments ▶	2022-05-04 Pending (E-Transfer)	2022-09-15 Pending (E-Transfer)	2023-01-15 Pending (E-Transfer)	
	TOTALS		\$100.00	\$175.00	\$175.00	
Items ▼		UNALLOCATED				
FW22-23:KT101 (Meghan Berry) ?	\$400.00		\$50.00 ⌚	\$175.00 ⌚	\$175.00 ⌚	
22-23:InsurFee (Meghan Berry) ?	\$50.00		\$50.00 ⌚	\$0.00	\$0.00	

SAVE

Legend:  Unallocated  Unallocated (locked)  Allocated  Allocated (locked)						
	Payments ▶	2022-05-04 Pending (E-Trans	2022-09-15	2023-01-15	Reconciliation History	
TOTALS		\$100.00				
	UNALLOCATED					
\$400.00		50.00	\$175.00 ⌚	\$175.00 ⌚	2022-05-04 10:29 AM + 175.00	
\$50.00		\$50.00 ⌚	\$0.00	\$0.00	Current Total \$175.00	

Easily view and customize an attributable amounts if changes have been made to an invoiced. See the reconciliation history to track down any reconciliation issues.





uplifter

Contact us today to learn how  
we can support your club:

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