

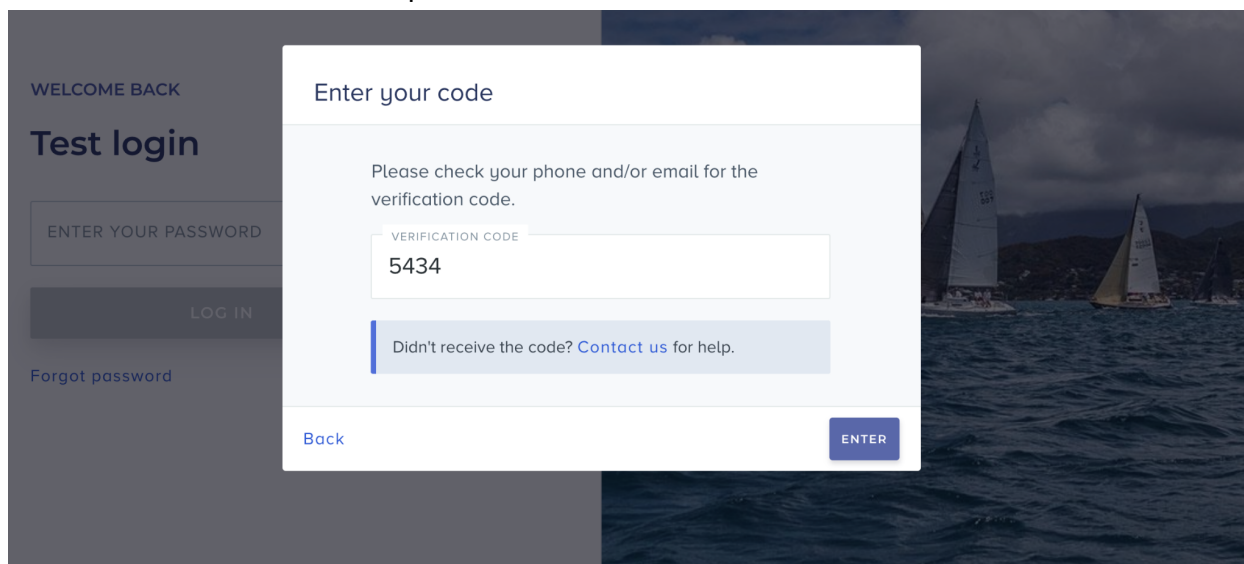
***This is a guide for first-time users of the new AYC Yacht Club Member Portal.
Our new portal will give you expanded access to membership information, the ability to sign-up for events and activities as well as the ability to manage your personal Club account details.***

In this introduction, we will cover logging in for the first time, and managing some basic account settings.

Creating Your Account

To begin, please log onto <https://austinyachtclub.theclubspot.com/account> You can click this link, or paste it into your browser window.

1. You will then be prompted to log in to your account for the first time. Please use your email address or mobile number to log in for the first time - this will become your username.
 - If the portal does not recognize your email or mobile number, please contact support@theclubspot.com for assistance.
2. Since this is your first time logging in to the site, you will be prompted to enter a one-time account verification code (sent to your email or mobile number on file). If you don't receive the one-time passcode via email or text, please contact support@theclubspot.com - we'll be happy to help
3. Enter the verification code and press the "enter" button.



4. Upon successfully verifying your email address, you will be prompted to add a new password to your account.

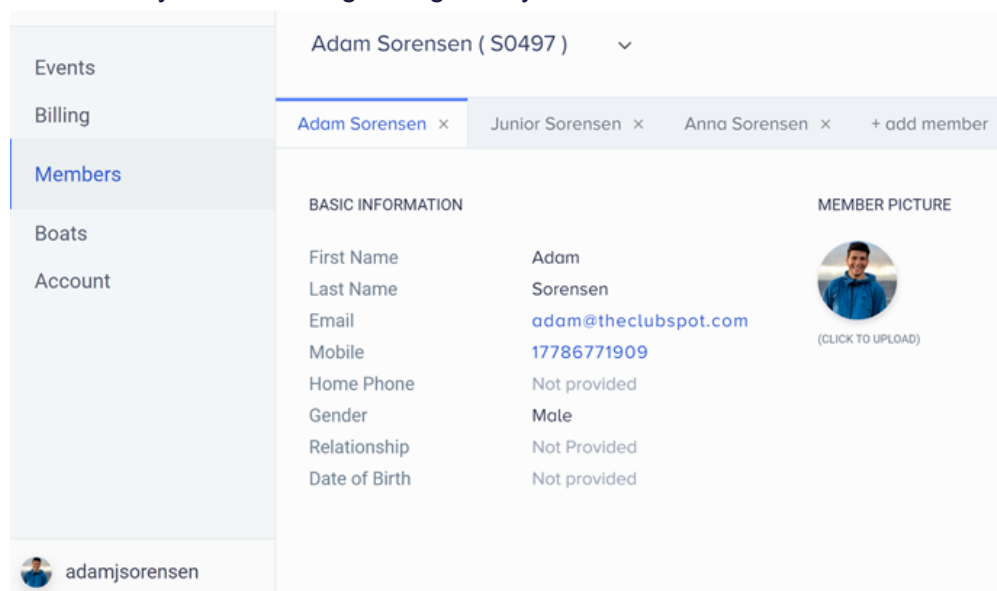
Congratulations!!! You are now an active user of the new AYC Member Portal!!

Membership and Billing Information

One of the many benefits of our new system is the ability to securely store all Membership information. The first thing to do when you have access is to ensure all of your data is up to date.

Membership

- To manage your contact information, first click on the “My Account” button, which takes you to your personal account page. The left-hand navigation panel will have a few options, but for now, let’s focus on your information. Click the “Members” tab
- From here, you can manage things like your name, address, date of birth etc.



The screenshot displays a web interface for managing membership. On the left is a vertical navigation menu with options: Events, Billing, Members (highlighted in blue), Boats, and Account. The main content area is titled 'Adam Sorensen (S0497)' with a dropdown arrow. Below this is a horizontal tab bar with 'Adam Sorensen' (active, with a close 'x' button), 'Junior Sorensen' (with a close 'x' button), 'Anna Sorensen' (with a close 'x' button), and '+ add member'. The 'Adam Sorensen' tab shows a 'BASIC INFORMATION' section with fields: First Name (Adam), Last Name (Sorensen), Email (adam@theclubspot.com), Mobile (17786771909), Home Phone (Not provided), Gender (Male), Relationship (Not Provided), and Date of Birth (Not provided). To the right is a 'MEMBER PICTURE' section with a circular profile picture of a man and a '(CLICK TO UPLOAD)' link. At the bottom left, there is a small profile icon and the username 'adamjsorensen'.

Hints:

- The first name that comes up (*the far left name listed*) is the primary name associated with your Club Membership. Each AYC Membership can have multiple family members. The primary name and associated contact information is where AYC Statements will be emailed.
- If you wish to switch names for the primary contact, click on that member's name, and an option to switch primary contact will appear.
- The second name (*just right of the first name*) is for your spouse or partner. Your children can also be added as members to the right of the second name.

Billing

1. Back in the left-hand navigation window, you will see a “Billing” tab which allows you to view your current balance, look at a history of charges, and see upcoming and past invoices or payments - all in one place.

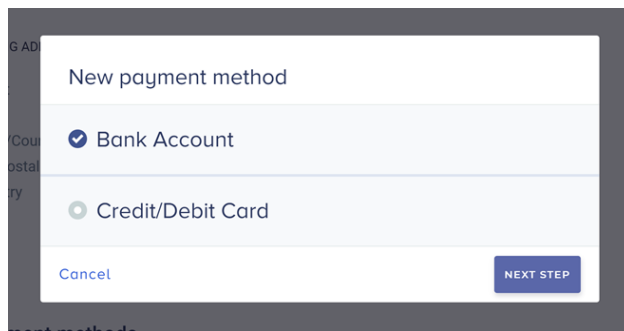
The main task at this point to be done immediately is to set up a Payment Method for your account.

- Click on “Billing”
- Scroll down to the “Payment Methods” section. Click on “add a payment method”

Payment methods

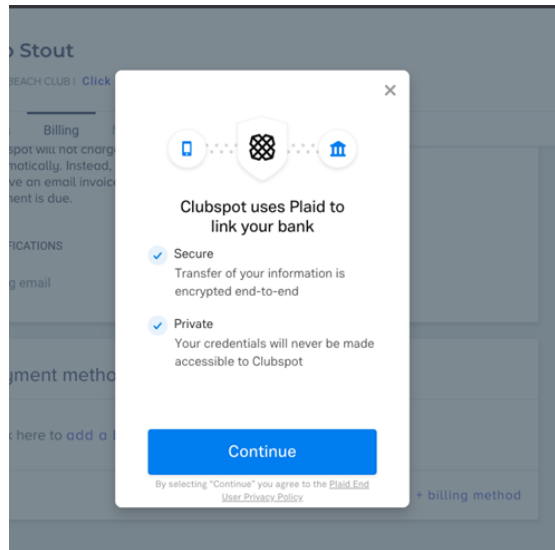
Click here to [add a payment method.](#)

- There are two automated choices for payment - “Bank Account” or “Credit/Debit Card”
- Follow these steps when choosing “Bank Account”

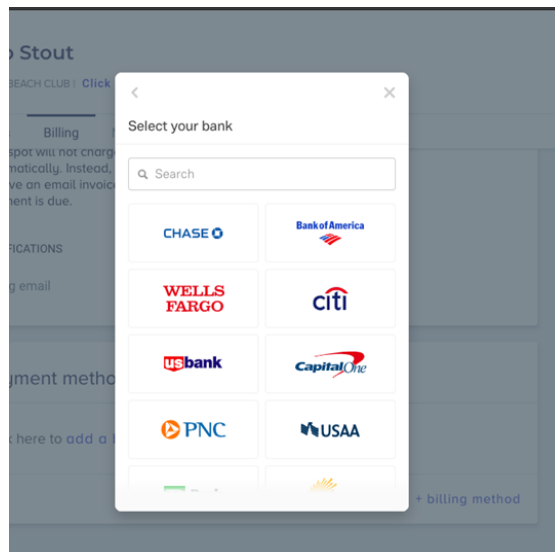


The screenshot shows a modal dialog box titled "New payment method". It contains two radio button options: "Bank Account" (which is selected with a blue checkmark) and "Credit/Debit Card". At the bottom left of the dialog is a "Cancel" link, and at the bottom right is a blue button labeled "NEXT STEP". The dialog is overlaid on a blurred background of the "Payment methods" section.

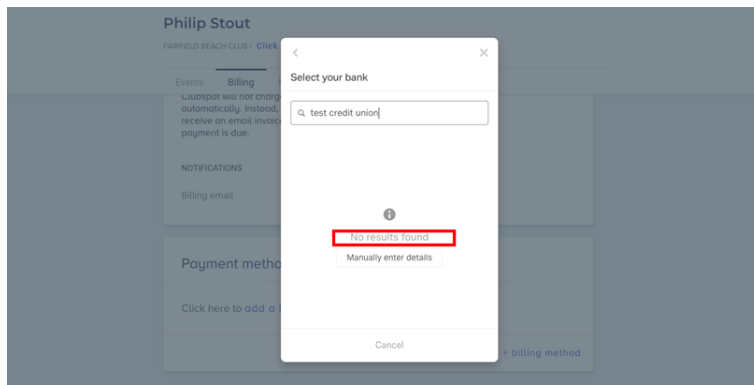
- A popup will appear that notifies you that Plaid will be used to protect your financial data.



Press the “Continue” button and follow the steps to add your bank account



- If you search for your bank and cannot find it, please email us at support@theclubspot.com and we can manually add it for you.



- Follow these steps when choosing “Credit Card”

New payment method

☐ Bank Account

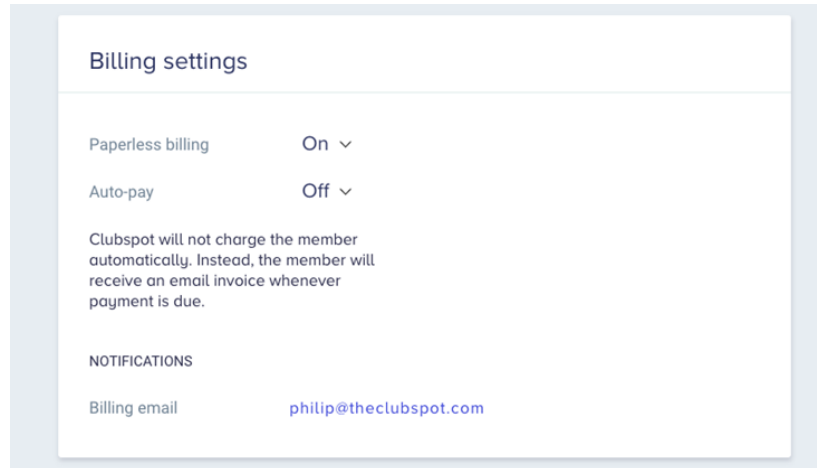
☒ Credit/Debit Card

[Cancel](#) [ADD CARD](#)

- Enter your card information
- Enter the expiration date
- Enter the CVC code
- Enter your Zip Code
- Click “Add Card”

2. After you have added a bank account, feel free to manage your billing settings under the “Billing Settings” section in the Billing tab. From here, you can elect to turn paperless billing

and auto-pay on or off. **UNTIL FURTHER NOTICE, PLEASE LEAVE “AUTO-PAY” OFF**



Billing settings

Paperless billing	On ▾
Auto-pay	Off ▾

Clubspot will not charge the member automatically. Instead, the member will receive an email invoice whenever payment is due.

NOTIFICATIONS

Billing email	philip@theclubspot.com
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And that's it! If you have any questions or concerns, please feel free to reach out to either support@theclubspot.com