Online Portal Features

We have been working on some exciting new features that is now available on your online portal. The next time you log in you will now have the ability to:

- 1. View any membership agreements completed from 1st June
- 2. View your current financial details being used for your direct debit billing
- 3. Provide new financial information for credit card or bank account (EFT)

How to log in to your portal

- 1. Visit https://canadabay.perfectmind.com/
- 2. Enter in your email address and password > Login

| Don't have a lo | ogin? <u>Signup</u> |
|---------------------|---------------------|
| | |
| Login to your accou | int |
| Email | |
| | 2 |
| Password | |
| | |
| | Forgot your passwor |
| Log | gin |

Note: If you do not know your login information, please contact <u>info@fdlc.com.au</u> and we will reset your password for you. Just a reminder if you have a family account only 1 email address from the primary account holder can be registered.

Membership Agreements

To view any membership agreements completed from 1st June:

- 1. Navigate to your profile. My Profile > My Info
- 2. Click on your name or any linked accounts you are wanting to view



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| Ć |) My Profile 🔻 | Schedule | Launch Website | |
|---|--------------------|----------|----------------|---------------|
| | Client Schedule | | | |
| | Photo | Fu | ll Name Simple | Primary Phone |
| | | B | en Flintstone | 0411 111 111 |
| | | Fr | ed Flintstone | 0411 000 000 |
| | 2 | | | |

3. Scroll down to **Documents** > click the arrow to expand the section

| | > Schedules | |
|---------------|----------------------|---------------------|
| | > Activity Outcomes | 0 |
| \Rightarrow | ✓ <u>Documents</u> | |
| | Name | CreatedDate |
| | Membership Agreement | 22/07/2021 10:12 AM |

- 4. Any recent membership agreements will now be visible
- 5. Click on the document name
- 6. You will now have the ability to view the document or download the attachment directly via the **Document Link**





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View Current Financial Information

1. Under your profile, scroll down to **Finance Info** > click the arrow to expand the section

| ✓ <u>Finance Info</u> | New | | | | | |
|-----------------------|---------|--------------------|--------|--------------------|-------------------|-----------|
| Holder Name | Туре | Credit Card Type 🔻 | Status | Share With Account | Expiration Date 🔻 | Default 🔻 |
| Ben Flinstone | EFT/ACH | | Valid | | | V |

- 2. If you have made a purchase through our online portal or on an ongoing direct debit, your financial information used will be available here
- 3. Click on your account you wish to view.

Note: Due to CPI compliance only part of your details will be visible to you.

| Finance Info | | | |
|------------------|--------------|---------------|-----------------|
| ✓ Back to Client | | | |
| ✔ Detail | | | |
| 📀 Type: | EFT/ACH | Holder Name: | Ben Flinstone |
| 🕜 Default: | \checkmark | Status: | Valid |
| ? Times Failed: | 0 | | |
| Notes: | | | |
| | | | |
| ✔ Cheque Detail | | | |
| Bank Name: | Bankwest | Account Type: | Personal Saving |
| Account Number: | *****1111 | BSB Number | 111111 |
| | | | |
| > System Info | | | |

Provide New Financial Details

You now have the ability to update your financial information for your direct debit billing yourself instead of coming into the centre. You may wish to do this in the event you have an expired credit card or want to change bank accounts.

Important Note: The new financial information you supply will come into effect immediately and your future direct debit payments will come out of your nominated account. If you are unsure please contact the centre prior to making any changes

1. Under your profile, scroll down to **Finance Info** > click **New**

| ✓ Einance Info | | | | | | |
|----------------|---------|--------------------|--------|--------------------|-------------------|-----------|
| Holder Name | Туре | Credit Card Type 🔻 | Status | Share With Account | Expiration Date 🔻 | Default 🔻 |
| Ben Flinstone | EFT/ACH | | Valid | | | V |

 Under Type click on the drop-down menu > Select either Credit Card or EFT/ACH (for bank account)



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Finance Info

| ✓ Detail | | |
|-----------|-------------|---|
| 🕜 *Type | Credit Card | ~ |
| 🕜 Default | | |

- 3. To enter bank account details
 - a. Type = EFT/ACH
 - b. Select **Default** to schedule all future billing payments using this method
 - c. Holder Name = account holder name
 - d. Bank Name = your financial institution
 - e. Account Number = bank account number
 - f. Account Type = select option suited or if unsure select "Personal Savings"
 - g. BSB Number = Bank State Branch (six-digit number)
 - h. Save

| | | | ✓ Save | Cancel | | |
|-----------------|------------|-----------|--------|------------------|-----------------|--|
| Finance Info | | | | | | |
| ♥ Detail | | | | | | |
| | 🛛 *Type: | EFT/ACH | ~ | *Holder Name: | Ben Flinstone | |
| 6 | Default: | | | Status: | Valid | |
| 🕑 Time | es Failed: | 0 | | | | |
| | Notes: | | | | | |
| | | | | | | |
| ✔ Cheque Detail | | | | | | |
| *Bar | nk Name: | Bankwest | | 🕜 *Account Type: | Personal Saving | |
| | | | | *BSB Number | 111111 | |
| *Account | Number: | 111111111 | | | | |
| | | | | | | |
| System Info | | | | | | |
| | | | ✓ Save | Cancel | | |

- 4. To enter Credit Card details
 - a. Type = Credit Card
 - a. Select **Default** to schedule all future billing payments using this method
 - b. Holder Name = Account holder name
 - c. Credit Card Type = Visa, Mastercard or AMEX
 - d. Credit Card Number = 16 digit number on your credit card
 - e. Card Verification Value = the 3 or 4 digit number on the back of your card
 - f. Expiry Month = card month of expiry
 - g. Expiry Year = card year of expiry
 - h. Billing Address = Your residential address or click **Copy Address from Parent** to autofill what's on your file
 - i. Save



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| Finance Info | | | | |
|--|-----------------|-------------------|------------------------------|-----|
| ✔ Detail | | | | |
| 📀 *Type: | Credit Card 🗸 | *Holder Name: | Fred Flinstone | |
| 🕜 Default: | \checkmark | Status: | Valid | |
| 7 Times Failed: | 0 | | | |
| Notes: | | | | |
| | | | | |
| | | | | |
| Credit Card Detail | | | | |
| *Credit Card Type: | Visa 🗸 | *Expiry Month: | 8 - August | ~ |
| *Credit Card Number: | 111111111111111 | *Expiry Year: | 2023 | ~ |
| *Card Verification Value: | 111 | *Billing Address: | Copy Address from Parent | |
| | | | Crn Queens Rd and William St | |
| | | | Five Dock | |
| | | | Australia | ~ |
| | | | New South Wales ~ 2046 | ·•• |

5. If you would like to share these details with your linked accounts, please email your authorisation request to <u>info@fdlc.com.au</u> or complete a change in account form at the centre

Note: All details are entered through a secure platform and stored through CPI compliance standards. Once you hit Save yourself and FDLC staff members will be unable to access your full information.

