How to Set a Member’s Affiliation

Emails · https://a2bmanager.com/docs/set-affiliation/

Embedded media: https://a2bmanager.com/wp-content/uploads/2026/10/set-affiliation-walkthrough-v3.mp4

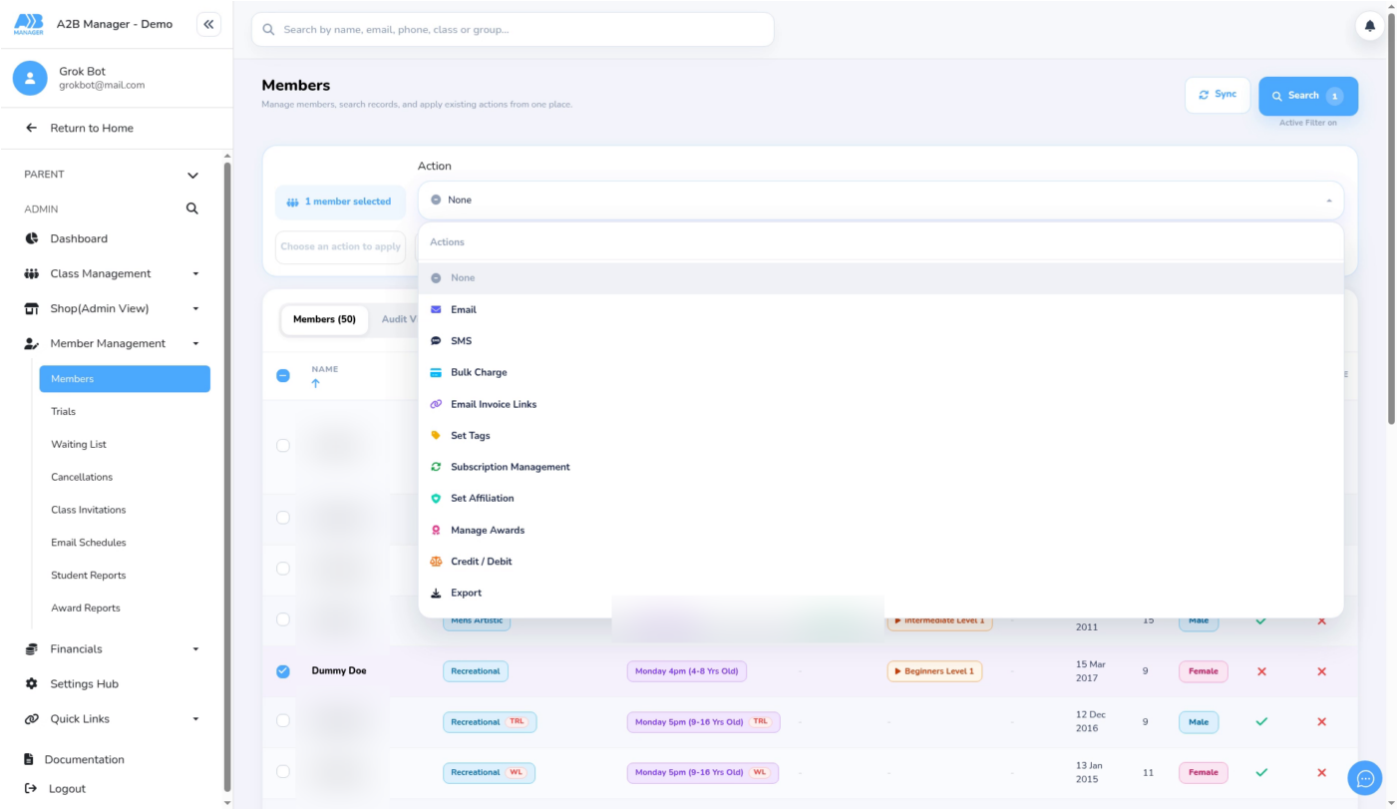
Video walkthrough: setting affiliation

Record whether members are registered with your governing body (for example British Gymnastics), with their cover expiry date and insurance level. This is a record only. It doesn't take any payment.

Setting affiliation

Step 1: Choose Set Affiliation (0:00)

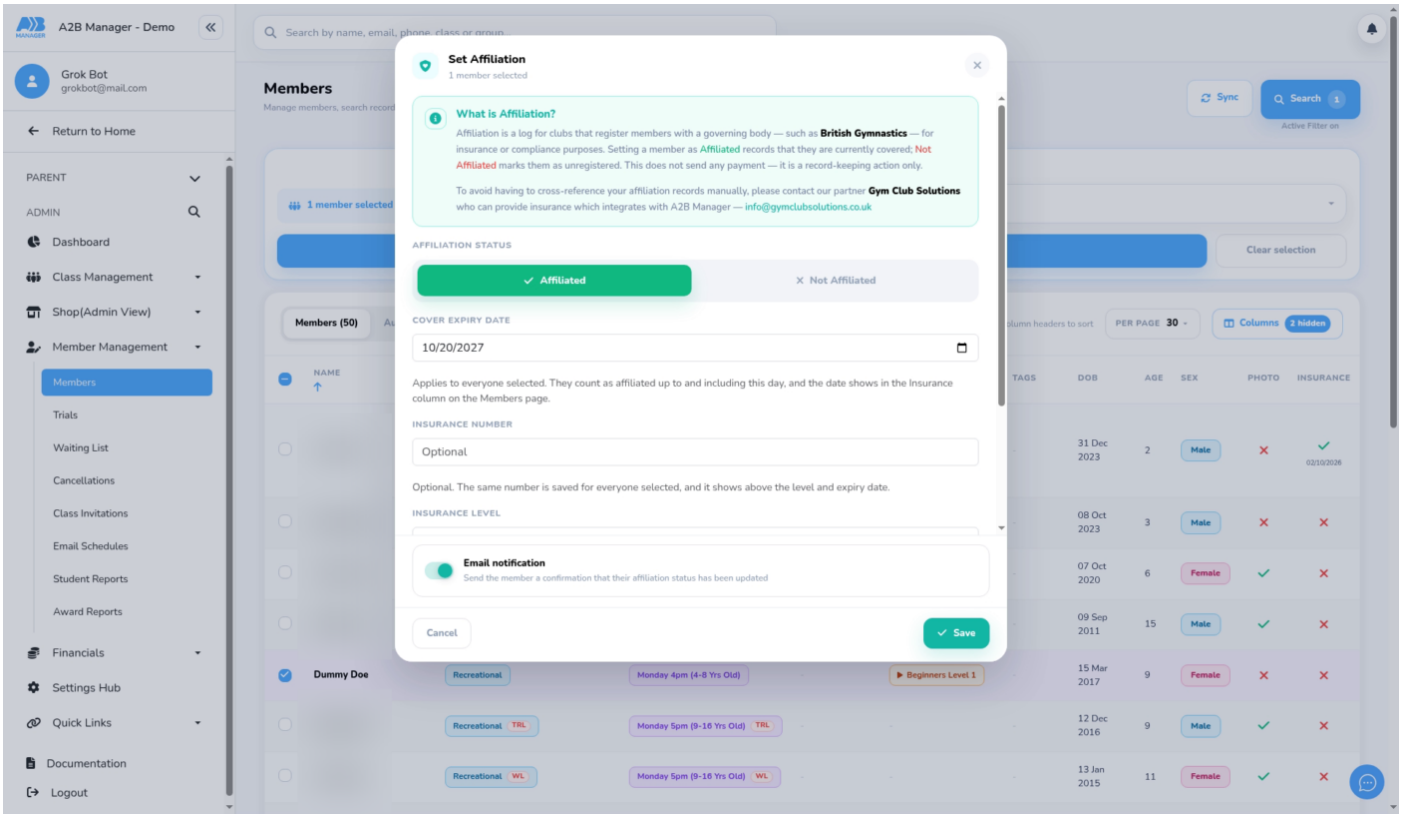
- Go to **Member Management** > **Members** and tick the members you want to update.
- Open the **Action** list and choose **Set Affiliation**.
- You can also do this from a class list: tick the members there and choose **Set Affiliation** from its actions.



Step 1: Choosing Set Affiliation

Step 2: Set the status and expiry (0:10)

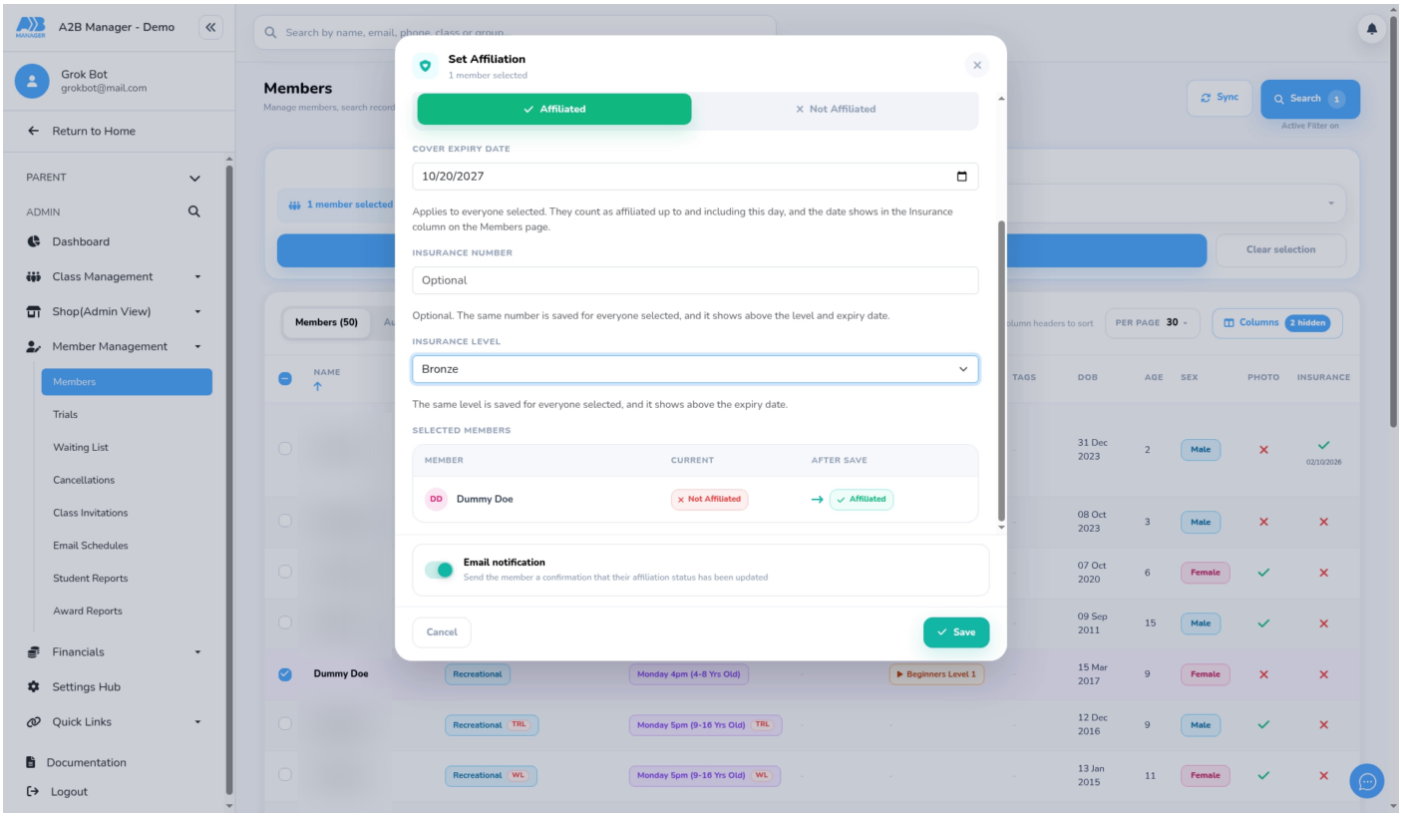
- Choose **Affiliated** or **Not Affiliated**.
- For Affiliated, set the **Cover expiry date**. Members count as affiliated up to and including this day.
- **Insurance number** is optional. The same number is saved for everyone selected.



Step 2: Status and cover expiry date

Step 3: Choose the insurance level (0:27)

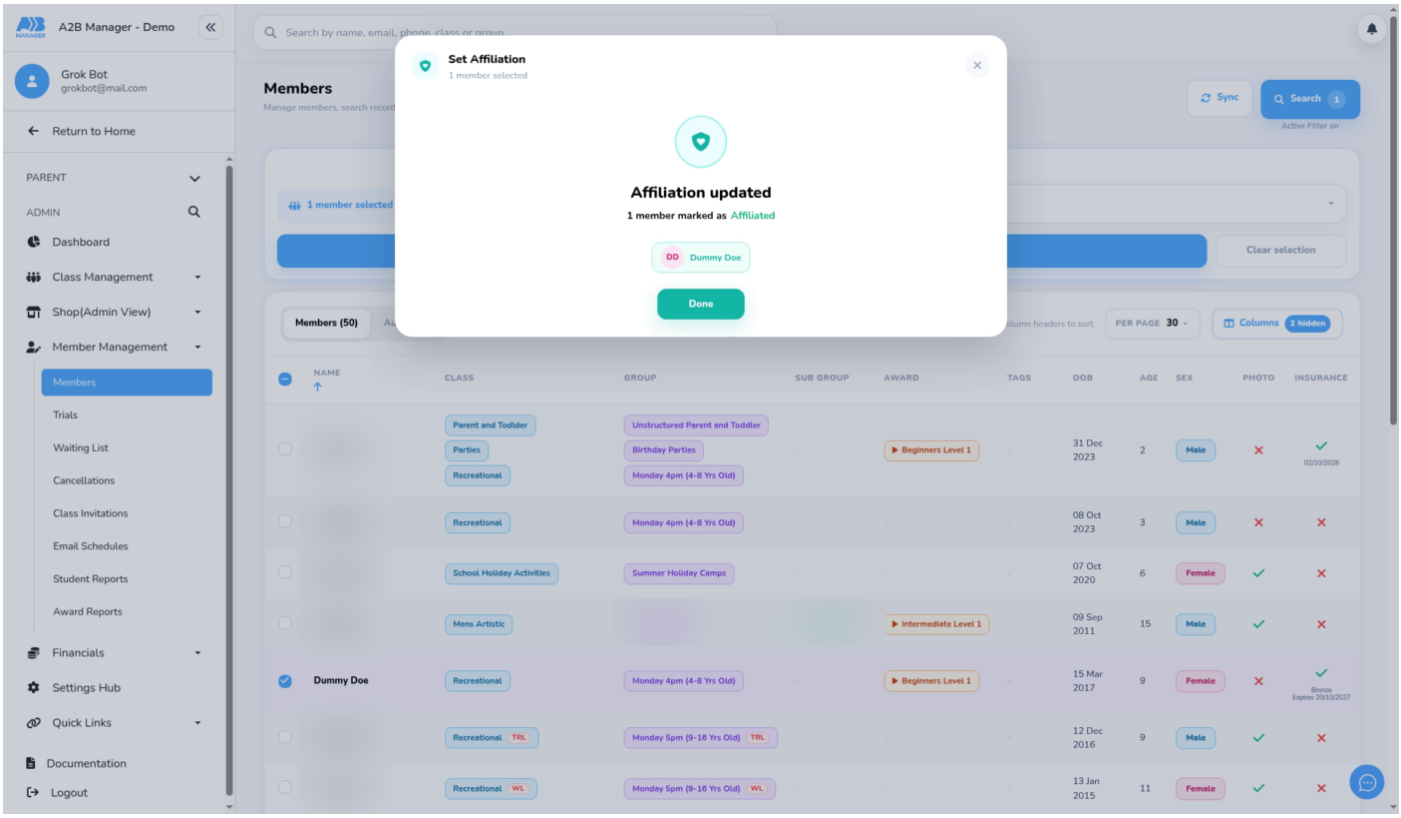
- Pick an **Insurance level**. If your club has levels set up, you must choose one for Affiliated. Saving without one does nothing.
- **Selected members** shows each member's current status and the status after you save.



Step 3: Choosing the insurance level

Step 4: Save (0:46)

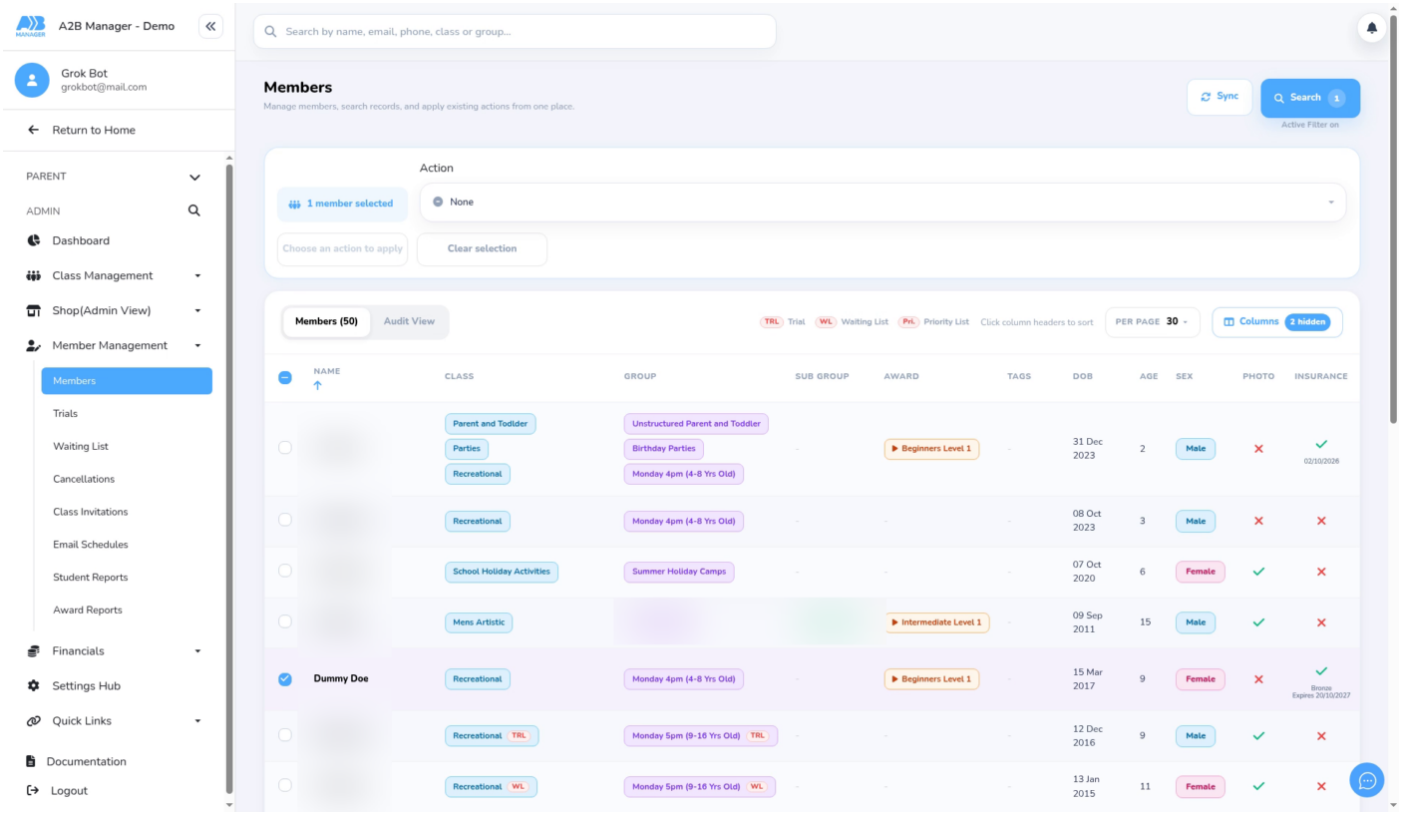
- Leave **Email notification** on to email the parent, or turn it off to save without emailing.
- Click **Save**. You'll see **Affiliation updated** with the members that were changed.



Step 4: Affiliation updated

Step 5: Check the Insurance column (0:53)

- Click **Done**. The **Insurance** column on the Members page shows a tick with the level and expiry date.



Step 5: Insurance column

The Set Affiliation email

- With **Email notification** on, each member's parent gets the **Set Affiliation** email. Edit it under **Settings Hub** > **Email Templates** > **Set Affiliation**.
- The default message is: *Dear {ParentFirstName} {ParentLastName}, {StudentFirstName} {StudentLastName} affiliation status has been set as {AffiliationStatus}.*

Good to know

- Setting a member to **Not Affiliated** clears their expiry date, insurance level and insurance number.
- If your club uses automatic insurance tracking, the level isn't asked for.

Download the PDF guide (optional)