

# **User Guide for Online Registrations**

Instructions to help guide associations/clubs/schools through online registration.

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### 1. Introduction

Superforms are a special type of online registration form that includes key fields of data to be collected from individuals (e.g. name, email, DoB). The form is shared by the parent organisation (e.g. netball centre, softball association etc.) with their affiliated organisations (e.g. clubs and schools).

Clubs/schools can add their own fields onto their own local version of the form if they wish. Importantly this information is not shared with the parent organisation but available locally to help administer sport at that clubs/school. Clubs/schools can also display their online form for parents/players to register directly online.

After the first season using Superforms clubs/schools can easily invite their database back to register. A unique 'magic link' is emailed to each person in the database that simply requires the person to click on the link to update their details and re-register for the new season. No login is required.

More comprehensive support articles are available through Sporty Online Support. Click here.

## 2. Registration of players

There are three options for the online registration of players:

- 2.1 Players complete the online registration form themselves, or
- 2.2 Club/school administrator completes the registration form for each player, or
- 2.3 Invite existing players to re-register for the new season (from the second season onwards only).

#### 2.1 Players complete the online registration form themselves.

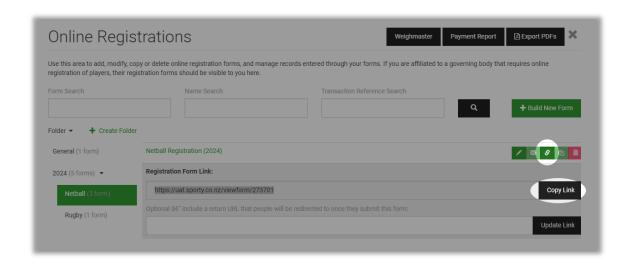
This is the recommended method to ensure the player data entered is accurate.

This step explains how to email a link to the registration form to players. Alternatively, you can display the registration form on your Sporty website or if you do not use a Sporty website, you can display a link to the registration form from your existing website or Facebook page.

#### 2.1.1 Display a link to the registration form.

Each form has its own unique link. You can email or even text someone the link for them to complete the form. For instructions on how to obtain a link to display or share, <u>click here</u>.

Paste this link onto your Facebook page. When people click on the link, they are taken directly to the registration form.



### 2.1.2 Display a registration form on your Sporty site.

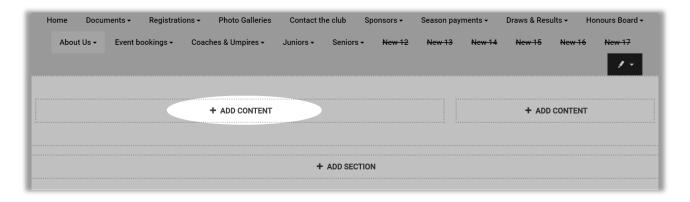
**Login** to the web page for your club/school on Sporty.co.nz For instructions on how to login, see Section 7.1 at the end of this guide.

You can then display your registration form on a page.

For help on how to unhide and rename a page on your Sporty website see the online support articles:

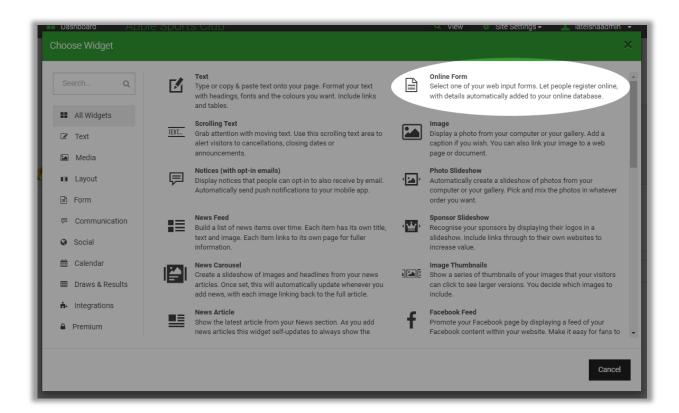
- How to hide and show pages, click here.
- How to rename pages, <u>click here.</u>

On the page you wish to display the form click the 'ADD CONTENT' button.

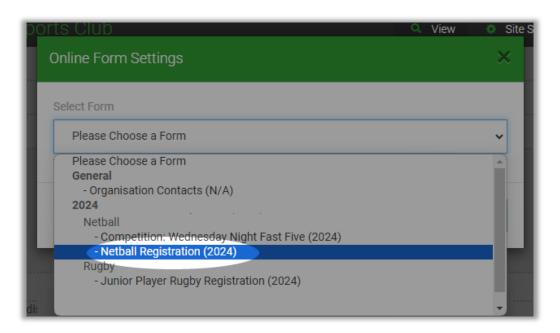


This displays a list of content 'widgets' that you can display.

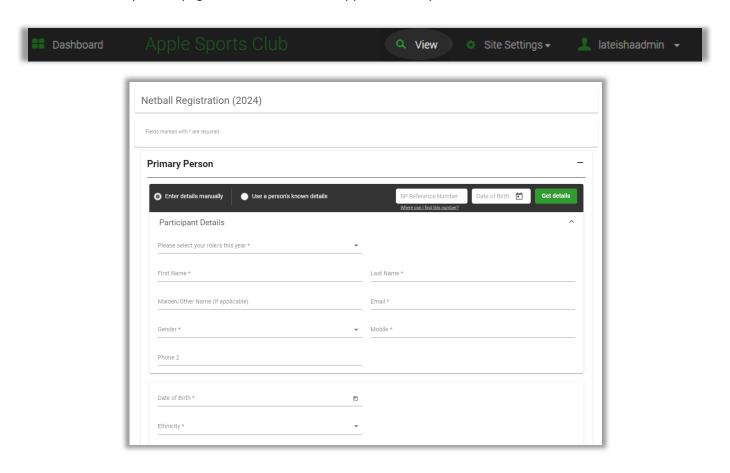
Click Online Form.



Select the form from the drop-down list, then click the 'Save' button.



Click **View** at the top of the page to see how the form appears to the public.



You can now tell your players to go to your website on Sporty to complete this registration form. When they register, they will automatically be emailed a copy of their completed form. The details of all people that register is automatically recorded in the online database that is part of your site from Sporty.co.nz.

You can view and update your database and easily export to Excel if you wish. This is explained further in **Section 6. Viewing and managing your online database.** 

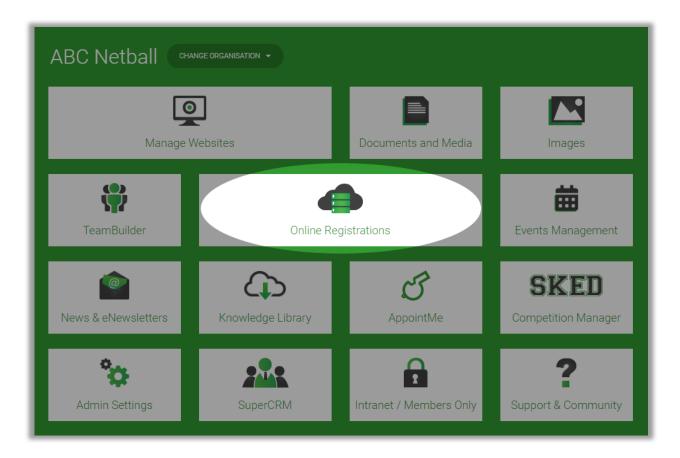
2.2 Club/school administrator completes the registration form for each person.

It is possible to manually register people yourself as the club/school administrator. As it is easy to email/display a link to your form we do not recommend this. If your parent organisation has terms and conditions you need to ensure that you have consent to agree to the terms and conditions on behalf of the person you are registering.

**Login** and go to your **Dashboard**.

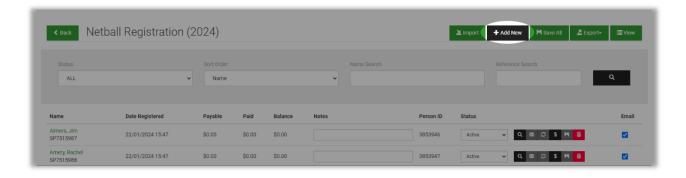


### From the Dashboard, click the tile Online Registrations



Click the name of the **form/database** that you wish to manage. This will display the database view of the registration form.

To register a person, click the **Add New** button.

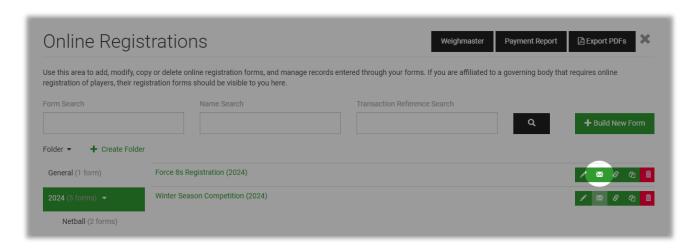


This will display a blank registration form. Enter your player's details and click **SUBMIT.** Note that by doing this, if there are terms and conditions that must be accepted, you will be accepting this on behalf of the player. Once submitted, the player will now be visible to you in the database. Repeat this process for any other new players.

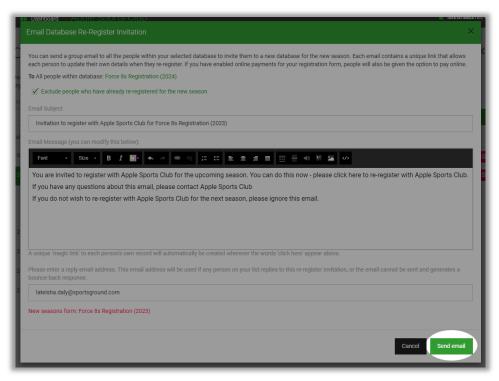
### 2.3 Invite existing players to re-register for the new season (season 2 onwards).

When you have an existing database of players from the previous season, you can invite your players to re-register for the new season. This sends each person who registered last season an email containing their own unique 'magic link' to re-register. When they click on the link it opens the new seasons registration form pre-populated with their details from last season. All that they are required to do is update any details then click Submit.

To invite your database, click the **envelope (email)** icon beside the form/database you want to invite. Ensure this relates to the **PREVIOUS** season i.e. to invite people to register in 2020, click on the link against the 2019 database:



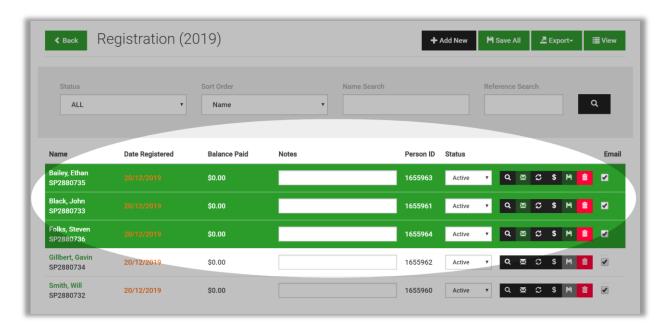
This displays the group email page. You can alter the text that is included with each email. For example, you may wish to include information about your trial dates, season fees or contact information.



When you are ready, click **Send email** and each person from last season will receive the email, including their own unique link to your online registration form for the new season, **pre-filled** with their last known details from last season.

When people click the link in their email, they can update their details, make a payment (if you have enabled this option) and submit their registration online. They will automatically be emailed a copy of the details they submitted and appear in your member database for the new season, awaiting your approval there. View them by clicking on your database for the new season.

When you view your last season's database you will see people that have re-registered will appear highlighted in green.



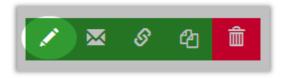
For further help see the support article 'How to invite your database to re-register for the new season' or click here.

## 3. Modifying your registration form

**This is optional.** The fields set by your parent organisation cannot be changed however there is the ability for you to add your own fields to the bottom of the form. For example, "Do you want to volunteer?" Any information captured in these fields will not be passed to your parent body.

### 3.1 How to modify your form.

To add fields, go to Online Registrations then click the **edit pencil** icon to edit the registration form.



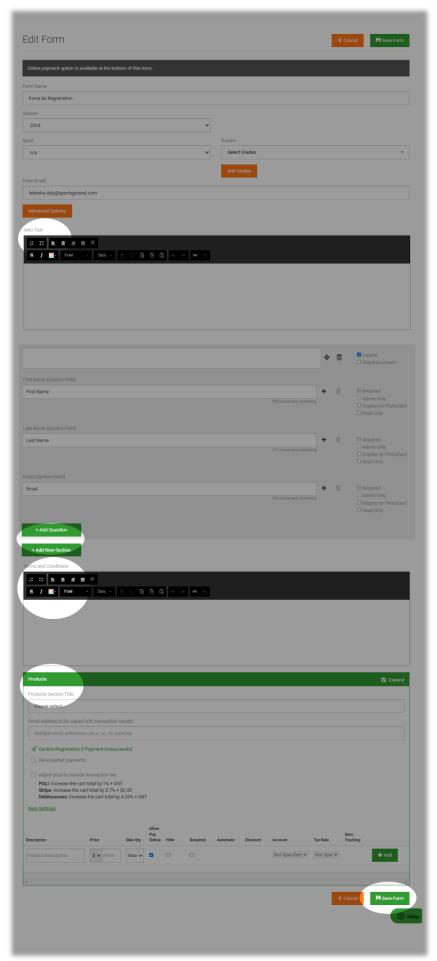
If you are editing a Superform, the fields in the top section will be greyed out as you cannot edit these. Scroll to the bottom of the form and click **Add Section**, then **Add Question** to start adding questions.

You will be able to add as many additional questions as you wish. Any information that is entered by your members on the fields that you have added to your form will not be submitted to your parent body. This information will stay locally at your site.

You can set a reply email address on your registration form. <u>Click here</u> to find out how. You can also set the form to email you a copy whenever someone registers. <u>Click here.</u>

Below is an example of what your view will look like when editing a form.

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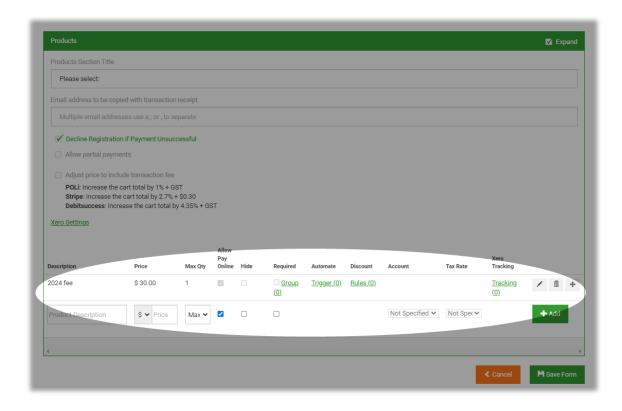


### 3.2 Online Payments.

Sporty provides an online payment facility called Sport\$pay.

For more information about Sport\$spay, click here.

Sport\$pay lets you accept online payments where each payment is recorded automatically against the registration record in your online database. To set this up please complete the online form at <a href="http://sportspay.co.nz/sportpay">http://sportspay.co.nz/sportpay</a>. Once activated you will be able to add "products" to the bottom of the registration form. You can elect to make payments mandatory or optional.



If your organisation uses Xero or MYOB accounting software, you can integrate online payments with Xero/MYOB.

For further information on how this can be enabled see our support article Xero for Sporty or MYOB for Sporty.

- Click here for Xero.
- <u>Click here</u> for MYOB.

### 4. Enter your Teams

Your parent organisation may require your teams to be entered via TeamBuilder to submit your teams into the competition. Even if they do not, TeamBuilder is a great tool to manage your players within teams.

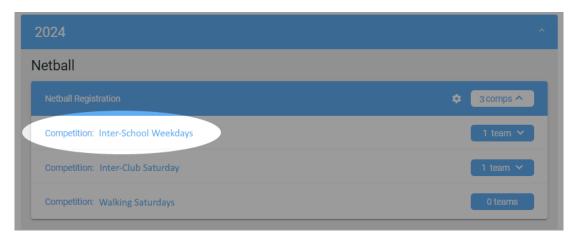
When entering teams, you will have one of two views.

- View one: When you click the TeamBuilder tile you are presented with competitions to select from.
- View two: When you click the TeamBuilder tile you are presented with the registration form itself.

For detailed instructions on entering teams, please click here.

4.1 View one – enter against a competition.

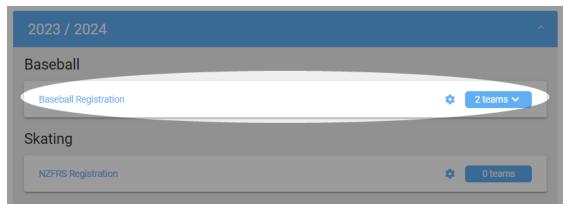
Once you have entered the TeamBuilder home page, you will see a list of **Competitions** that are set by your Centre or Association.



For instructions on entering a team when your view is against a competition, click here.

4.2 View two – enter against a Registration form.

Once you have entered the TeamBuilder home page, you will see a list of **Registration forms** that you can also view from Online Registrations.



For instructions on entering a team when your view is against a registration form, click here.

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## 5. Assign players to teams

### 5.1 Assign players to teams.

Once your players have registered and teams have been entered into TeamBuilder you can assign people to teams.

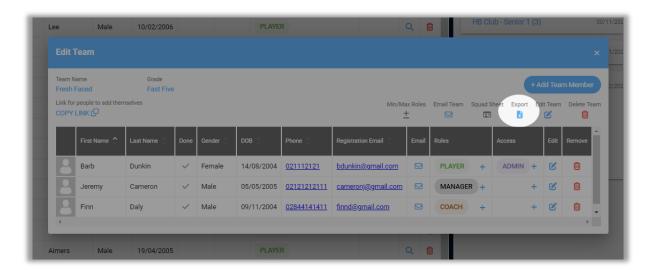
Go into the **Dashboard** and click the **TeamBuilder** tile. Click on the name of the form to open the TeamBuilder view.

If you have a select group of people to move into a team, select all records by ticking the checkbox to the left of the person's name then click the **Move X People to Team** button below. You will then be able to select which team the selected players are to be moved into.

Click and drag a single person from the list on the left and drop them into your teams on the right. This adds the person to that team and updates the team's name and grade set against that person.

To view your team, click the team icon to go into the 'Edit team' view. A team admin will have access to view only their team. This is emailed to the admin when the role is set.

You can export individual team details by clicking the export link. This will export the team in a CSV (excel) format. You can also export your entire database. For help, click here.



#### 5.2 How to allocate a person to more than one team.

In TeamBuilder, it is possible to allocate a person to more than one team. For example, a person may be a player in A team and a coach in B team. They will appear twice in your TeamBuilder database, and their name will be in *italics*.

Note there may be code specific requirements that prevent this for your code. Please check with your competition organiser if for any reason this is not enabled for your sport.

Faith	Rodgers	Female	01/01/2000	Mixed Social	Ray White Ravens	PLAYER
Faith	Rodgers	Female	01/01/2000	Fast Five	Proactive Huia	PLAYER

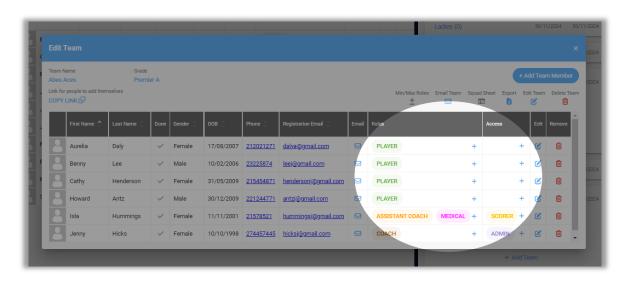
For further information, click here.

### 5.3 Team Roles.

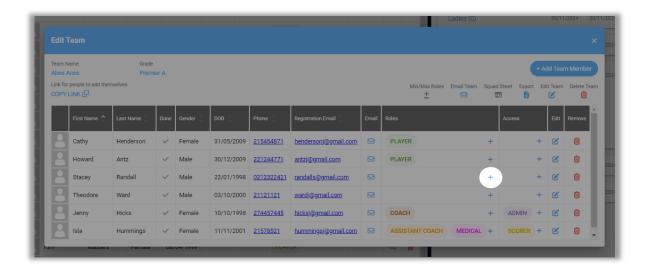
When a person registers, they select their Role(s).

- Player
- Assistant Coach/Manager
- Coach/Manager
- Medical
- Star Helper
- Trainer

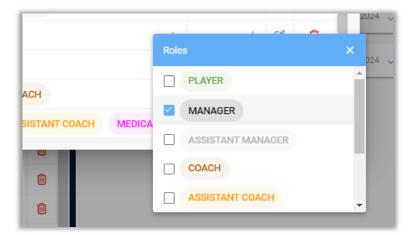
When the database is viewed in TeamBuilder the Roles appear as coloured icons. It is the easy to identify who is a player, coach, manager etc. When you export your database from TeamBuilder you can sort by role.



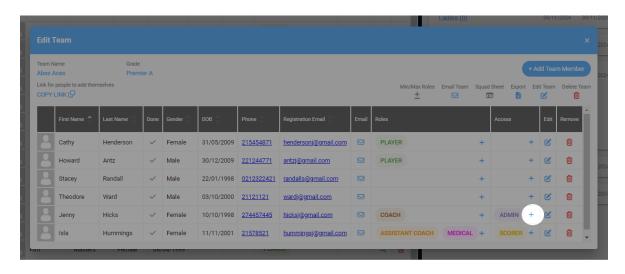
As the administrator you can assign Roles for a person. To do this, click the + beside a person's name in the **Roles** column.



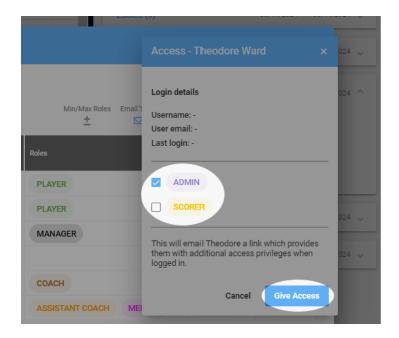
This displays the Roles available. Tick the checkbox to select the appropriate Role(s) then Save.



As the administrator of the site, you can set a **Team Admin** which you can do by clicking the + in the **Access** column beside the person's name. The team admin can then view and manage their team.



Tick the checkbox beside **ADMIN** and then click **Give Access** to send the person an email invitation for the team.



Note: Admin is not a Role as the admin person may not be a player. They might be a parent helping administer the team or a sports coordinator.

### 5.4 Minimum/Maximum Roles.

Your parent body may require min/max roles to be met per team e.g. a team has a maximum of 12 players, or a team must have a minimum of one coach.

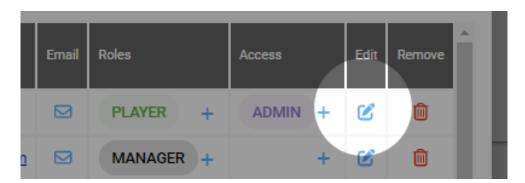
For information about minimum/maximum roles please visit Sporty Online Support or click here.

- A team will appear red if the minimum role requirements are not met, or there are required actions to be taken to players in the team.
- When the team has met the correct Min/Max roles needed in a team, the team icon will turn green.

### 5.5 Team Admin ability to update a person's details.

A team admin can update only specific person details.

From the team modal, click the edit pencil icon beside the record that you want to modify.



The fields that are available for modification will unlock. These are **Phone** and **Registration Email**. All other fields will remain locked. If a person has entered incorrect details that are locked, please contact support@sportsground.com.



For further information, click here.

## 6. Viewing and managing your online database

This is where you can view and manage all your players details. There is the ability to export your database(s) as a CSV (excel) file.

SuperCRM is an area available to you to view and manage your database where you can view by individual as well as viewing by season.

For a quick overview video of SuperCRM, click here.

In SuperCRM you can filter to display a subset of people, such as by year/season, age, grade, or other characteristics. You can communicate with groups including inviting members back to re-register using the 'magic link' method as explained in section 2.1 View previous season's database of people and invite them to renew their membership online.

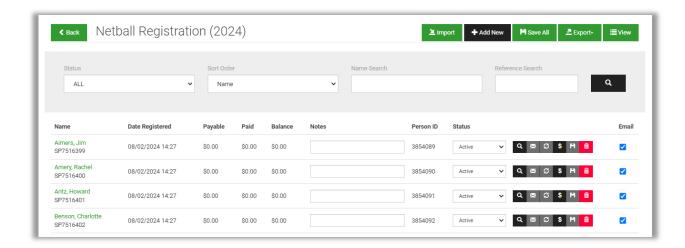
Comprehensive online support for SuperCRM is available through Sporty Online Support, or click here.

If your login does not have SuperCRM enabled contact <a href="mailto:support@sportsground.com">support@sportsground.com</a> to have access granted.

6.1 View your full database of players and non-players.

Go to **Dashboard** and click the **Online Registrations** tile.

Click the name of the form/database that you wish to manage. This will display the database view.



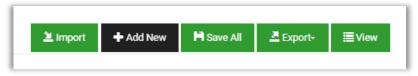
The various functions available from the database view are described below:



Status displays a dropdown list which filters the database to only show records with the selected Status.

**Sort order** lets you display your database ordered by Name or by Reference number. Tip: if you sort your database by the reference numbers, it will display in date order with most recent records on top.

Name Search lets you search all records within database for an individual name.



**Import** this lets you import data from a CSV file.

**Add New** lets you register a new person to that database through a blank input Form. Note that this is similar to when a person registers through the form displayed to the public, except that the person will **not** be emailed a copy of the form if they are added here.

**Save All** saves any changes you have made to various fields in the summary view (i.e. changing the status of a record, adding notes against a record). If you exit this page without clicking this button to save your changes, they will be lost.

**Export** exports full details of the database to Excel or CSV file.

**View** displays the database onscreen for you to view.



**Name** is the first & last name of the person registered. Click the name to view their full details. Below the name is their transaction reference. This is a unique transaction number for each registration record. It is generated automatically.

**Date Registered** is the date the person registered or was rolled forward to that season. This cannot be amended.

**Payable** is the total amount which the person has recorded against their account.

**Paid** is the amount that has been recorded as paid by the person.

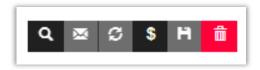
**Balance** is the outstanding amount owing on the person's account. This is the difference between what is payable and what has been paid. You can also record a payment manually (see 'Record Payment' below).

**Notes** lets you make notes against a record. Click the save icon to save changes.

Person ID the unique ID that is specific for that person, and that has all registration and record data attached to it.

**Status** lets you set a status for a person, such as 'Active' or 'Inactive' for your admin purposes.

**Email** un-tick this to prevent the person being emailed. This means the person will not i) be emailed an invitation back to re-register, or, ii) be a recipient of the eNewsletter (if this facility is being used).



Magnifying glass icon lets you view and modify the full details of each person registered.

**Envelope icon** lets you send an individual email to the person that includes a unique link they can click to update their details and re-register for the next season.

**Roll-forward icon** *lets you roll a record forward to re-register them for the next season on their behalf.* 

\$ (record payment icon) lets you record a manual payment. Enter the amount paid. The payment amount will be added to the Balance Paid column for that person. Note that you can enter a negative amount (e.g. -15) to reduce the 'Balance' amount.

**Save icon** saves changes made to a record.

Trashcan icon permanently deletes a record (warning: you cannot recover a record after it is deleted).

To delete a registration record, simply click the trashcan button to the right of the persons record.

It is rare to need to delete a record, so please treat this with caution. Examples of occasions when you may wish to delete a record are if someone is registered twice (e.g. a junior player is registered online separately both by their mother and by their father, or if someone registers but changes their mind and does not actually join you). When you click the delete button, you will be presented with a warning message.

If you are sure you wish to delete the registration record, click the 'OK' button to confirm. This will permanently delete the record from your database.

## 7. Login and Support

You will be provided with login details to the Sporty site for your club/school. If you are unsure of your login details, in the first instance please contact your parent organisation personnel.

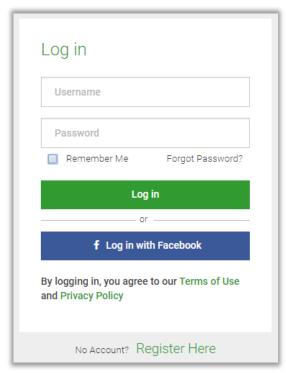
Click here for help.

#### 7.1 How to login.

At the bottom of the page for *your* organisation on the right-hand side, there is a link **Admin Login**. Click this to display the login screen.



Enter your Username and Password.



If you have forgotten your password, click the Forgot Password? link and a reset email will be emailed to you.

#### 7.2 How to invite additional administrators.

There is the ability to have multiple administrators. Any administrator can invite an additional administrator for their level of access or below. To find out how, <u>click here</u>.

### 7.3 Support.

Comprehensive online support is available at <a href="http://sportsground.support.com">http://sportsground.support.com</a>

Phone support is available for VIP customers at 0800 777 876.

 $\label{lem:emailsupport} \mbox{Email support is available at } \mbox{$\frac{support@sportsground.com}{.}$}.$