Little Athletics NSW

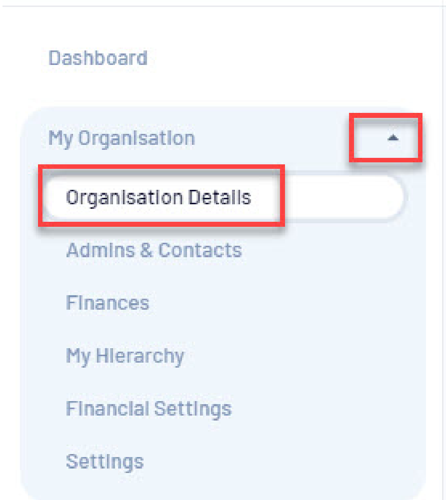
Registrar's Guide to GameDay

Table of Contents

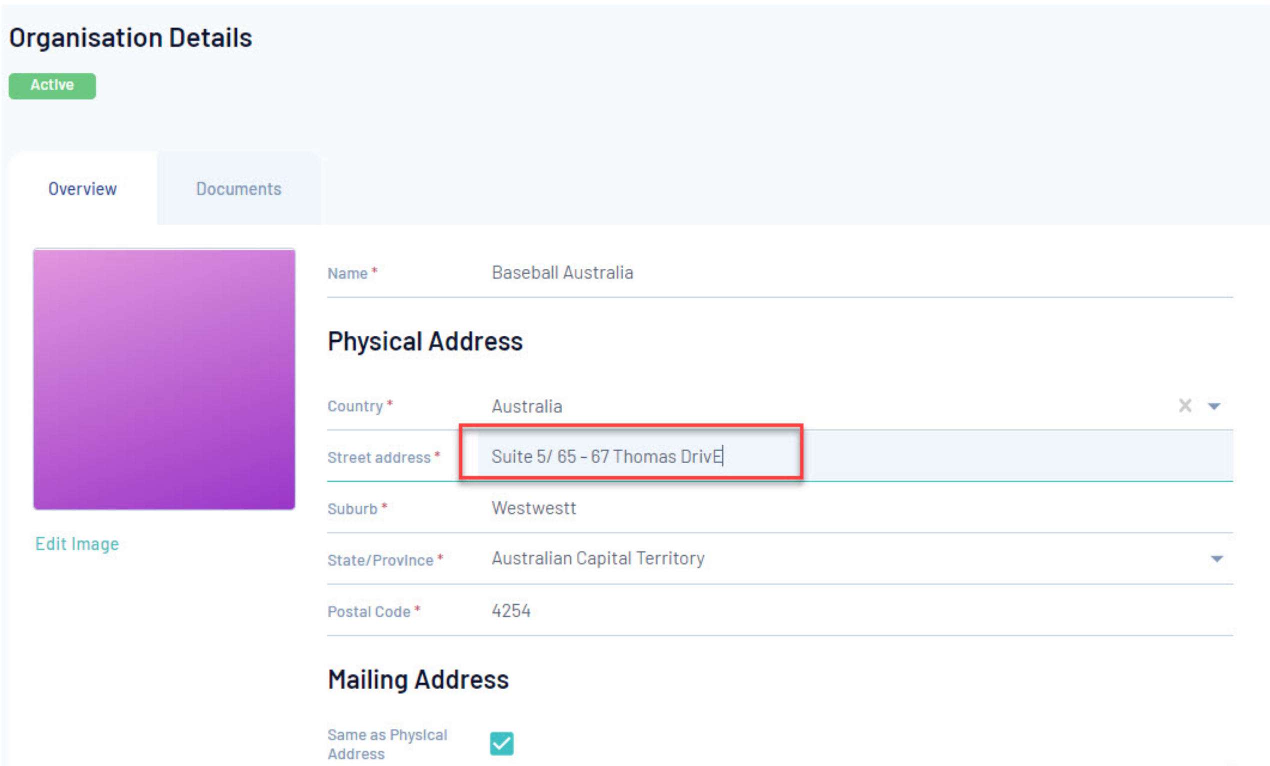
How do I edit my organisation details?

Last Modified on 10/12/2021 5:57 am AEDT

Click the arrow against **My Organisation** and select **Organisation Details:**



Click the field you would like to edit. This makes the field editable.



Make the required change within the field/s and click **Save**.

The types of organisation fields that can be managed & viewed are:

- Physical & Mailing Address
- Contact Details
- Organisation Type & Status
- Business, Incorporation & Tax Identification Numbers
- Timezone
- Customer Plan (View Only)

> NOTE: Any field marked with a red asterisk is mandatory.

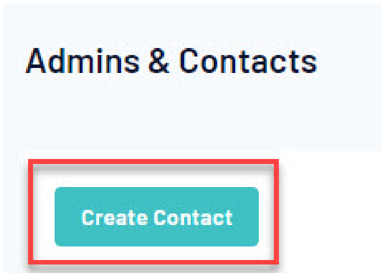
Related Articles

How do I grant someone admin access to my organisation?

Last Modified on 14/04/2021 3:32 pm AEST

1. Click arrow against My Organisation and click **Admins & Contacts**.

2. Click **create contact.**



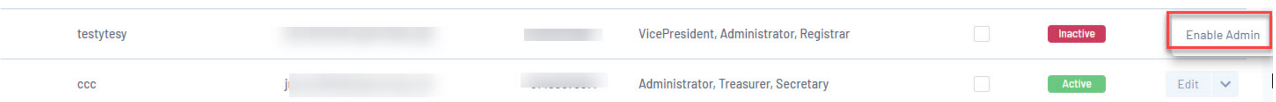
3. Input all relevant information and the click **save**.

- **IS PRIMARY checkbox:** by checking this box the user will become the primary contact for this organisations and receive emails relation to registrations, clearances etc.
- **ROLE:** select the relevant role that this user will have.

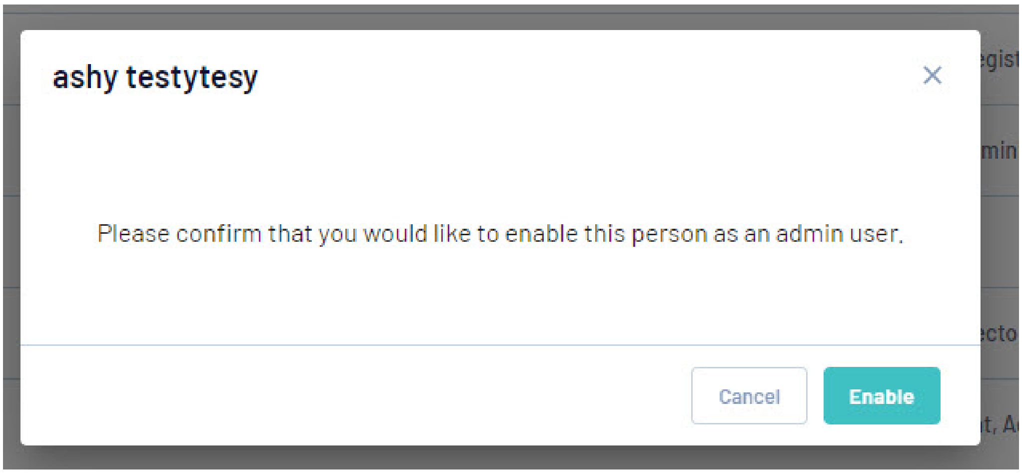
> NOTE: Only an admin with the **TREASURER** role will be able to add/edit bank account details.

4. The user will currently be listed as **inactive** in the list until you enable them as a user.

5. Click the arrow next to the users name and click **enable admin.**



5a. A pop up will appear asking you to confirm that you want to make this user an admin; click enable.



6. You will see a notification in the top left hand corner confirming that this user has been granted access and for them to check their email.

Be sure to let your admin know to check their inbox/spam folders for this email as this activation is required before they can set a password and log in.

Related Articles

How do I disable admin access?

Last Modified on 15/04/2021 9:28 am AEST

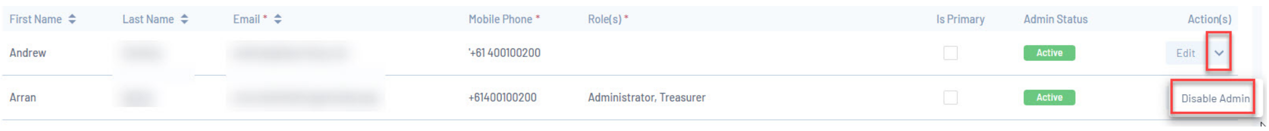
Other admins have the ability to disable admins if they are no longer part of the organisation or if they no longer have access to that email address.

Note: this will be the same process if you need to disable an admin for an organisation within your heirarchy. Just log into that organisation and follow this process.

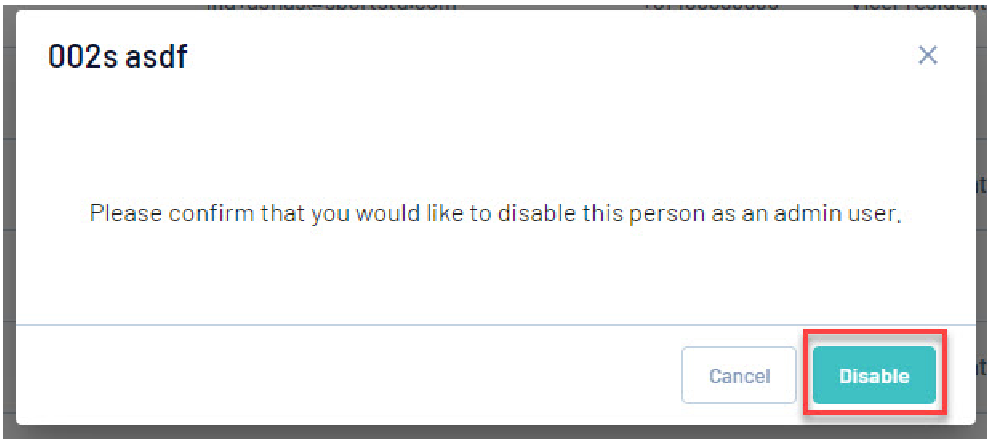
To disable an admins access:

1. Click on the arrow against **My Organisation** and click **Admins & Contacts**.

2. Click the **Drop Down Arrow** across from the admins name, then click **Disable Admin**.



3. You will then be asked to confirm if you would like to disable this admin, click **Disable**.



4. This member has now had their account disabled.

An admin no longer has access to the email address that their access is linked to, how do I update this to reflect the new email address?

If an admin no longer has access to the email address they have their admin access linked to, then you will need to disable the admin and then create a new admin user with the new email address- unforunately you cannot update the email address within the current access they have.

To disable the admin, use the steps above, then create a new admin with the new email address the user now has.

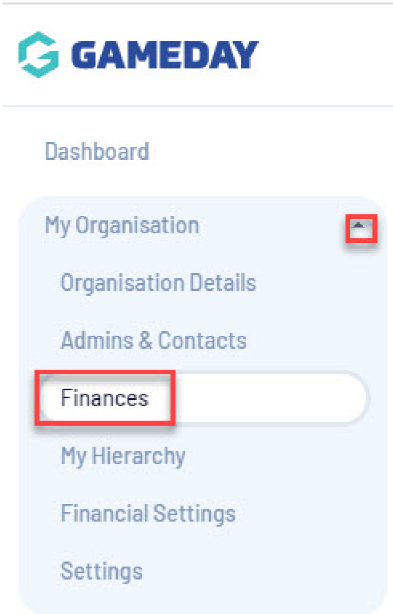
Related Articles

How do I view order and settlement information?

Last Modified on 08/06/2022 3:46 pm AEST

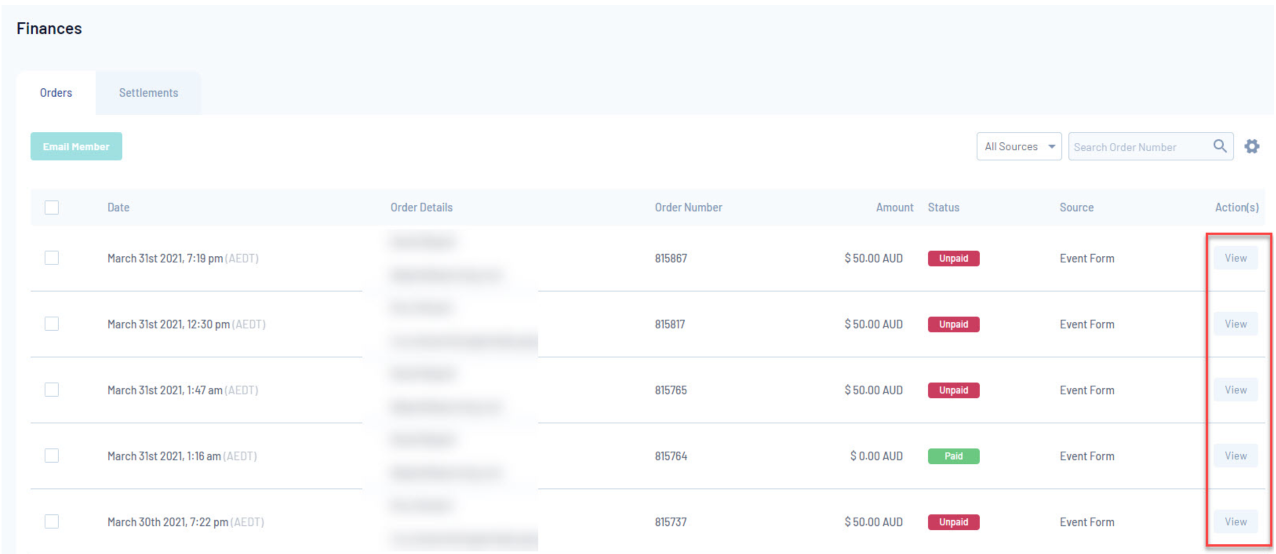
As an admin I want to view an order or a settlement to see the relevant information about that transactions were processed.

1. Click on the drop down arrow against **My Organisation**, click on **Finances**.

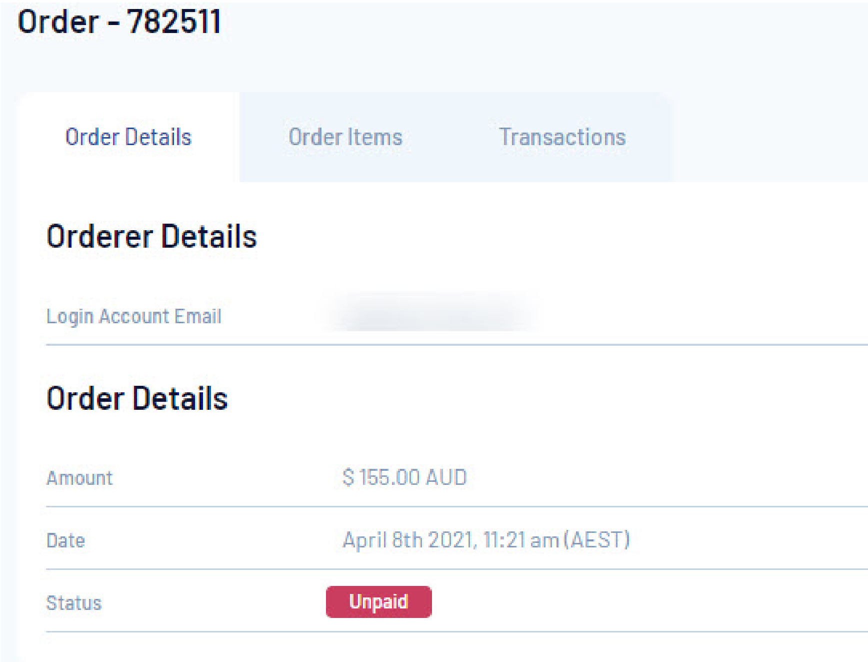


VIEW AN ORDER DETAILS PAGE

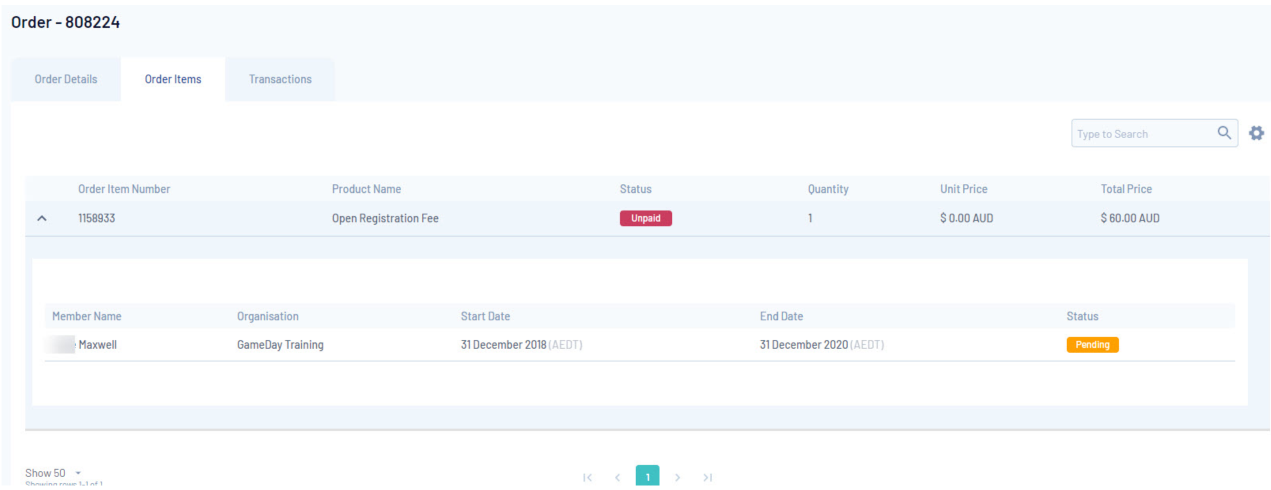
2. From the **Orders** tab, click **view** on an order number. This will take you to the order details page.



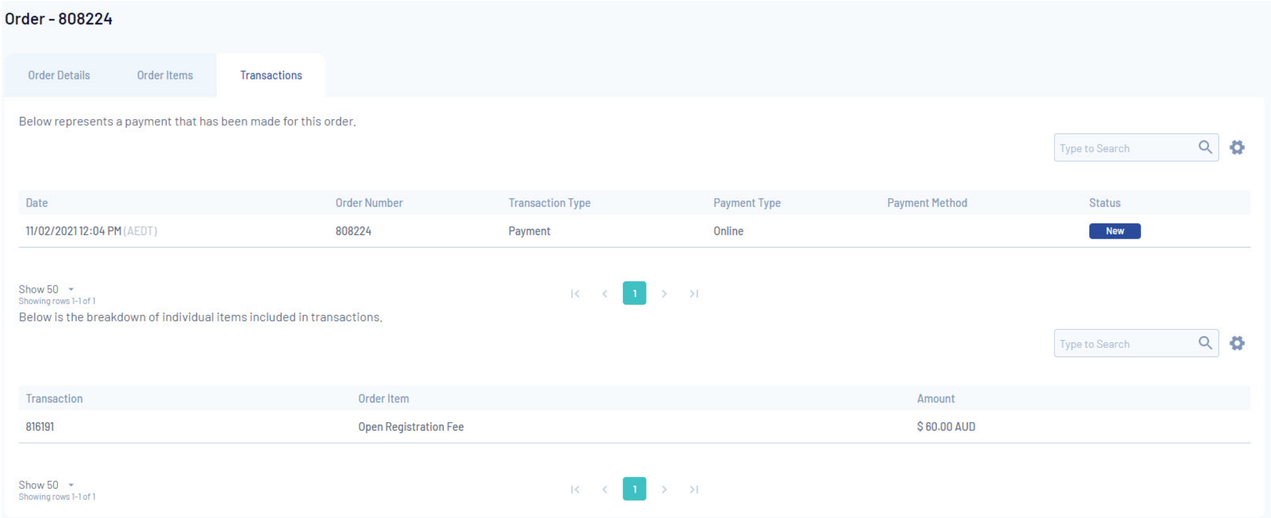
2. The **order details** tab will list the information related to the member who paid for this order (email), the date, amount and status of this order.



3. The **order items** tab will list the specific product purchased and which members it belongs to (if registering multiple people more then one product/member will show).



4. The **transactions** tab will list the payment specifics of the order as well as the indivdual transactions related to the order.



Order - 808224

Order Details | Order Items | Transactions

Below represents a payment that has been made for this order.

Date	Order Number	Transaction Type	Payment Type	Payment Method	Status
11/02/2021 12:04 PM (AEDT)	808224	Payment	Online		New

Show 50
Showing rows 1-1 of 1

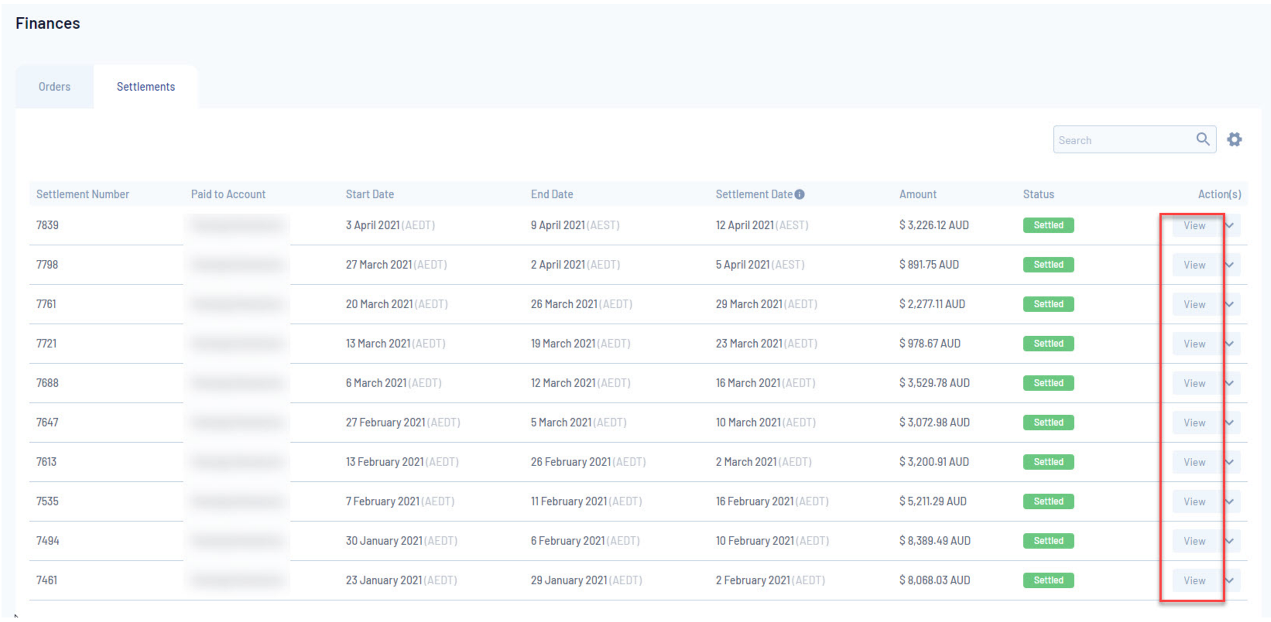
Below is the breakdown of individual items included in transactions.

Transaction	Order Item	Amount
816191	Open Registration Fee	$ 60.00 AUD

Show 50
Showing rows 1-1 of 1

VIEW A SETTLEMENT DETAIL PAGE:

1. From the Settlements tab, click on**view** next to a settlement number.

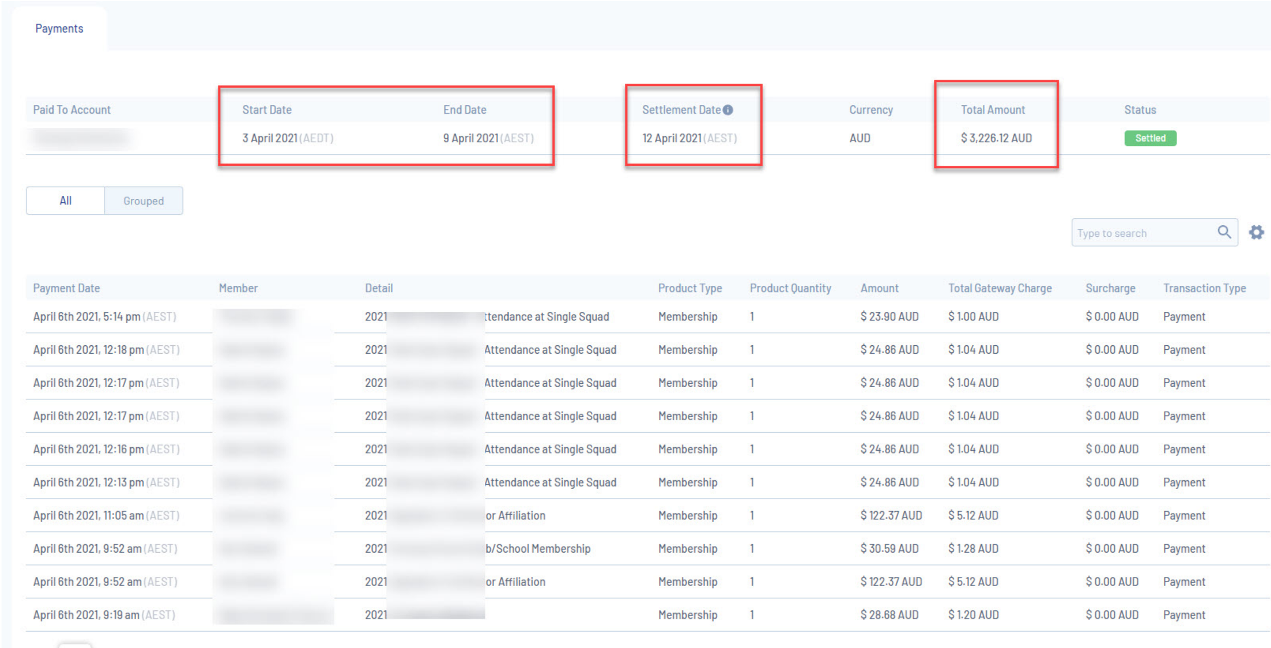


Finances

Orders | Settlements

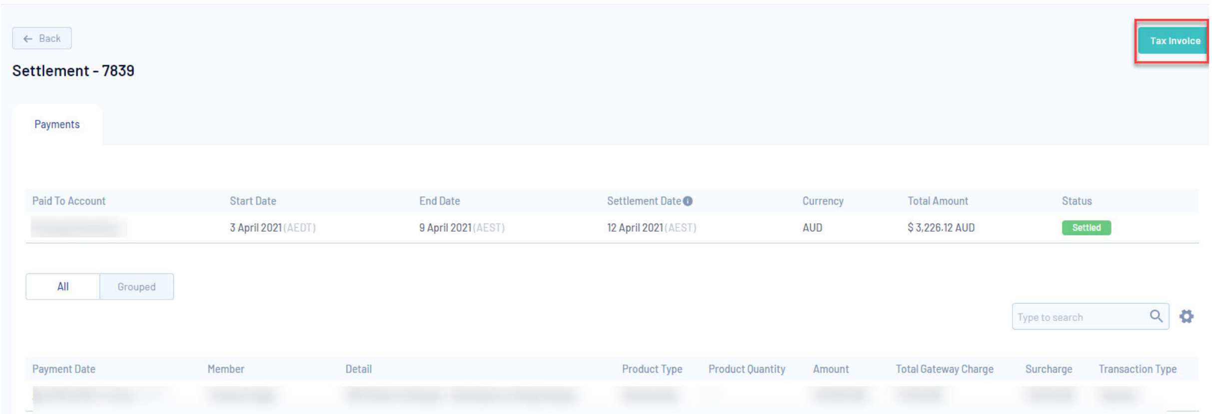
Settlement Number	Paid to Account	Start Date	End Date	Settlement Date	Amount	Status	Action(s)
7839		3 April 2021 (AEDT)	9 April 2021 (AEST)	12 April 2021 (AEST)	$ 3,226.12 AUD	Settled	View
7798		27 March 2021 (AEDT)	2 April 2021 (AEDT)	5 April 2021 (AEST)	$ 891.75 AUD	Settled	View
7761		20 March 2021 (AEDT)	26 March 2021 (AEDT)	29 March 2021 (AEDT)	$ 2,277.11 AUD	Settled	View
7721		13 March 2021 (AEDT)	19 March 2021 (AEDT)	23 March 2021 (AEDT)	$ 978.67 AUD	Settled	View
7688		6 March 2021 (AEDT)	12 March 2021 (AEDT)	16 March 2021 (AEDT)	$ 3,529.78 AUD	Settled	View
7647		27 February 2021 (AEDT)	5 March 2021 (AEDT)	10 March 2021 (AEDT)	$ 3,072.98 AUD	Settled	View
7613		13 February 2021 (AEDT)	26 February 2021 (AEDT)	2 March 2021 (AEDT)	$ 3,200.91 AUD	Settled	View
7535		7 February 2021 (AEDT)	11 February 2021 (AEDT)	16 February 2021 (AEDT)	$ 5,211.29 AUD	Settled	View
7494		30 January 2021 (AEDT)	6 February 2021 (AEDT)	10 February 2021 (AEDT)	$ 8,389.49 AUD	Settled	View
7461		23 January 2021 (AEDT)	29 January 2021 (AEDT)	2 February 2021 (AEDT)	$ 8,068.03 AUD	Settled	View

2. This will take you to the list of transactions that were processed for this particular settlement as well as what date these transactions were within and when the funds were settled to the organisations account.

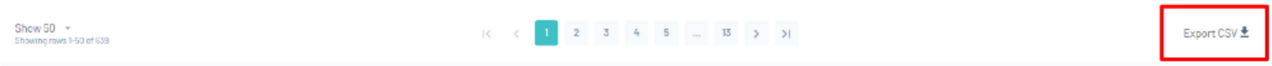


3. You can also download a **tax invoice** (in a PDF file) for these settlements that you can send to your finance team to reconcile funds.

It can be done via selecting the **tax invoice** option within the **settlement detail page** itself.



4. You can also export your settlements to a CSV file by scrolling to the bottom of the page and selecting the **Export CSV** button.



Related Articles

How do I mark a member's proof of age sighted?

Last Modified on 08/06/2022 3:56 pm AEST

Administrators have the ability to manually mark a member's record to indicate that they have sighted their proof of age, if this process is being done offline.

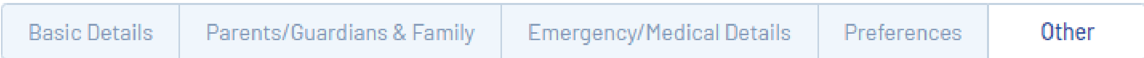
1. Log into the organisation

2. Click the drop down arrow against **MEMBERSHIPS.**

3. Click **MEMBERS.**

4. Search for the **members name** within the member list and the click **VIEW.**

5. In the **MEMBER DETAILS** section, click the **OTHER** tab



6. Tick the checkbox for **PROOF OF AGE SIGHTED?**

Related Articles

GAMEDAY

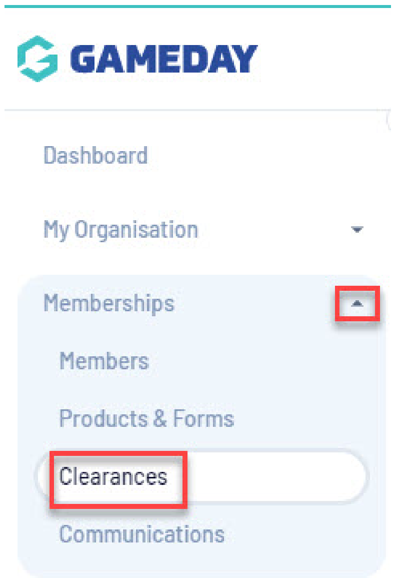
How do I request a clearance for a member?

Last Modified on 20/04/2021 10:47 am AEST

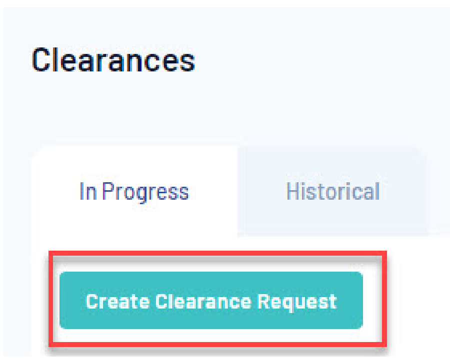
NOTE: Only clubs can request clearances as well as approve/deny clearances. If you are at a higher level you will need to drill down to the club to request or approve/deny clearances.

NOTE: Clearances should be requested from the club that member wishes to transfer to.

1. Click the arrow against Memberships, and click on**Clearances**.



2. From the In Progress tab, click**Create Clearance Request**.

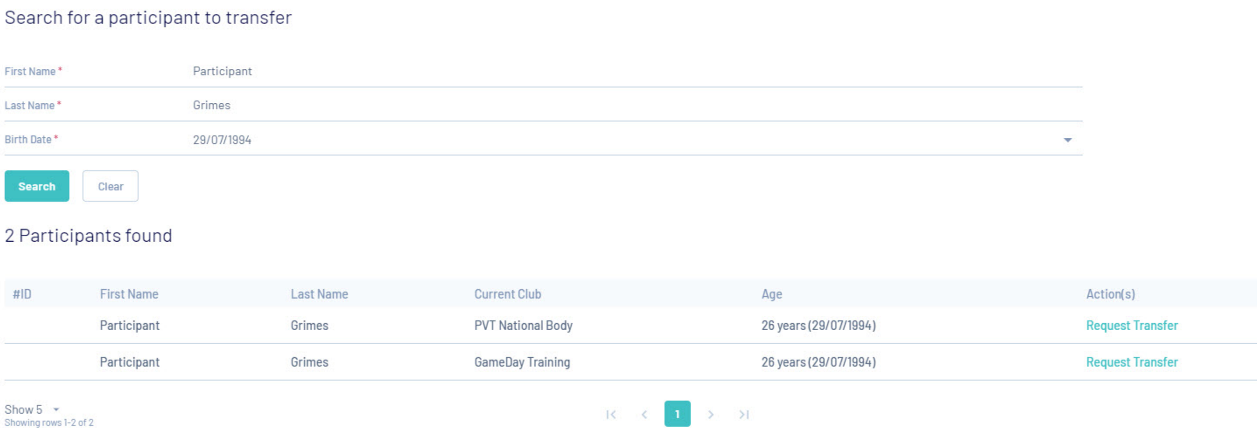


3. Input the **first name, last name and date of birth**of the member and click**search.**

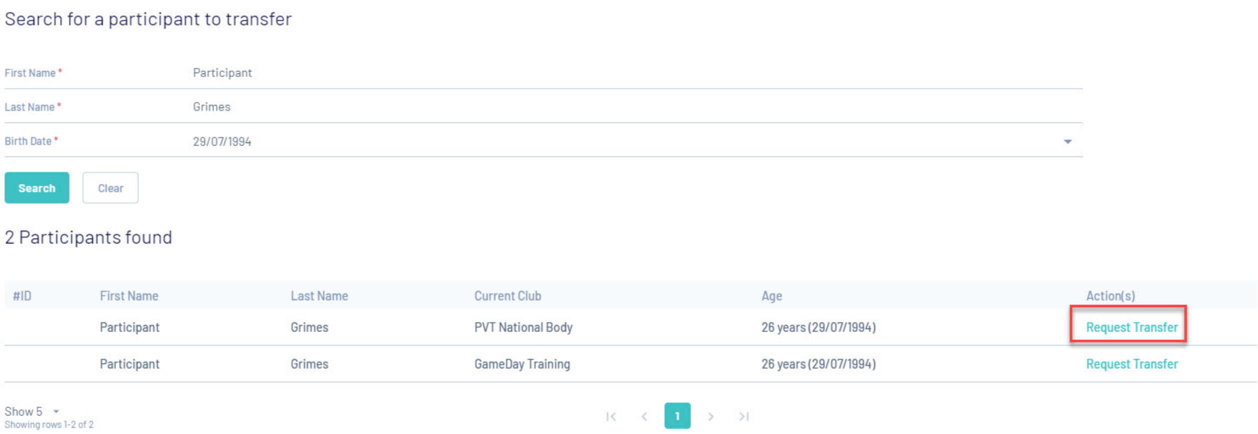
- The members first name and last name match that to what is currently listed for them within their club, otherwise the member won't be found, so please check this before requesting and get their club to change if needed.

4. After searching, the member should appear in the list.

- A member can appear multiple times if they have been at a different club throughout their playing history so be sure to select their current primary club.

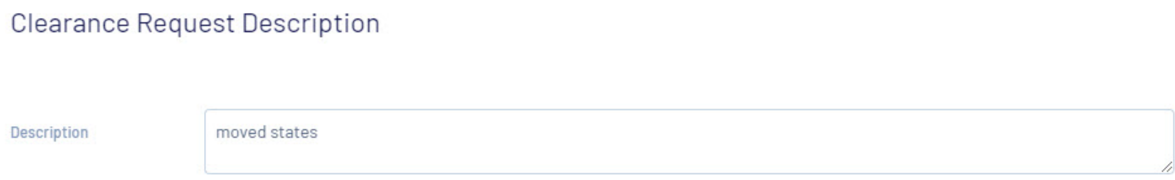


5. Click **request transfer** for the relevant club- this will be the club they are coming from.

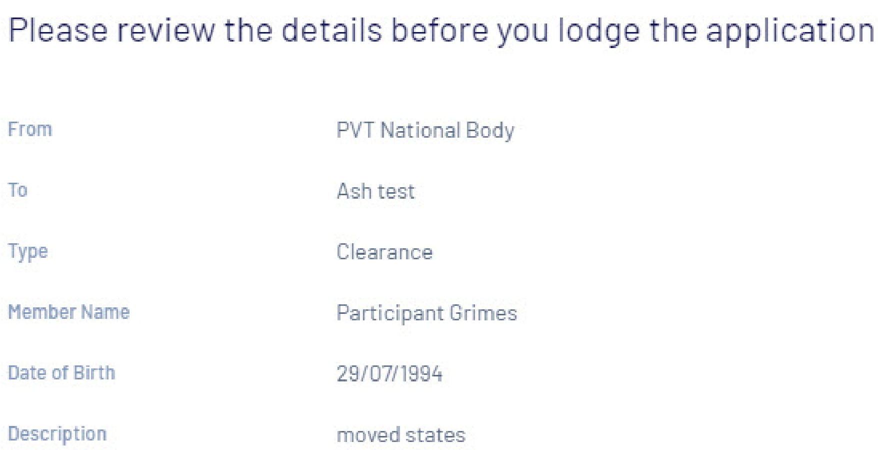


6. Input a **description** related to the transfer- why the member wants to transfer, then **click continue**.

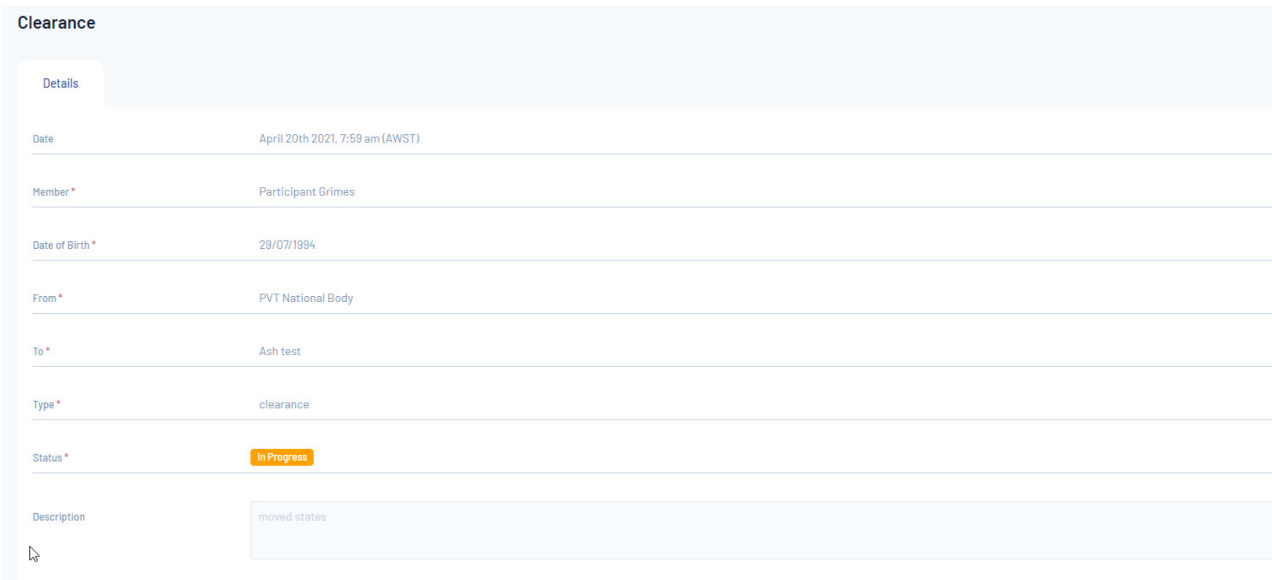
- This is not mandatory so you can leave this blank of you prefer.



7. A **summary page** will appear for you to look over the clearance request details. If happy click **save** to confirm the request.



9. This clearance has now been successfully requested and you should be taken to the request page where it will now display as pending.



NOTE: a clearance request email will be sent to the admin that requests the clearance, along with the member themselves to confirm this has been requested successfully, while as the primary contact for the club they are requesting the transfer from will be notified they have a pending transfer request.

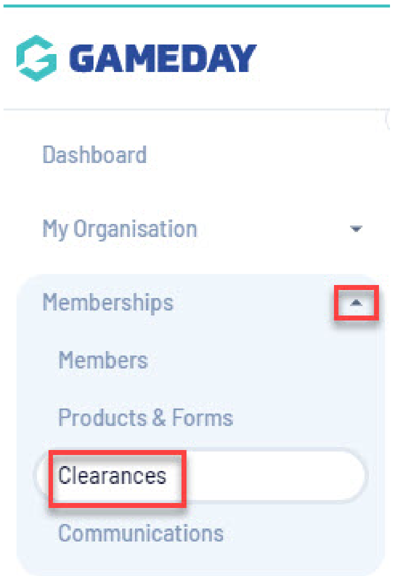
Related Articles

How do I approve/reject a clearance?

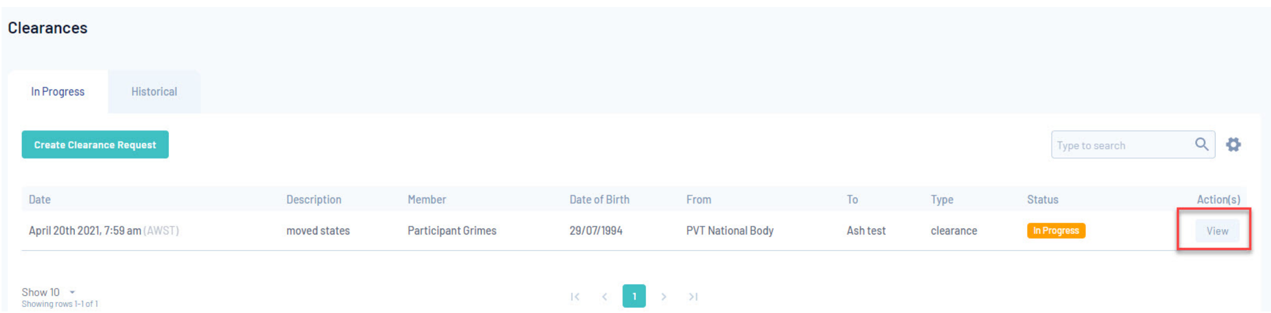
Last Modified on 20/04/2021 10:54 am AEST

NOTE: Only clubs can request clearances as well as approve/deny clearances. If you are at a higher level you will need to drill down to the club to approve/reject clearances. The clearance needs to be approved/rejected by the primary club of the member.

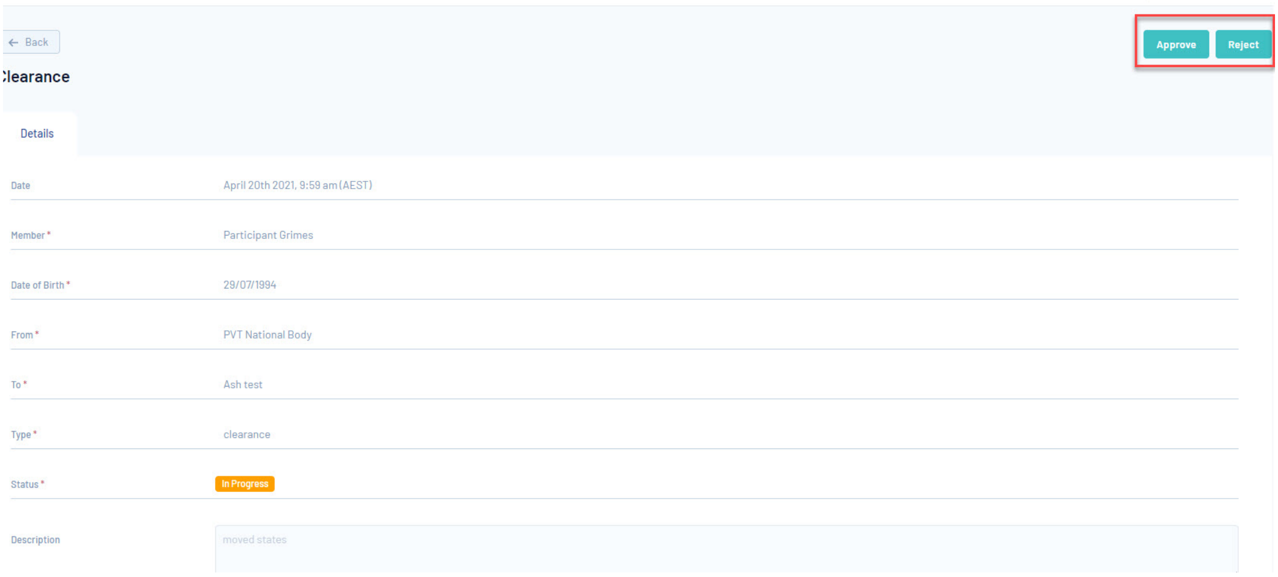
1. Click the arrow against Memberships, and click on **Clearances**.



2. From the **In Progress** tab, click on **view** next to the relevant clearance record.



3. In the clearance record, click **approve or reject**.

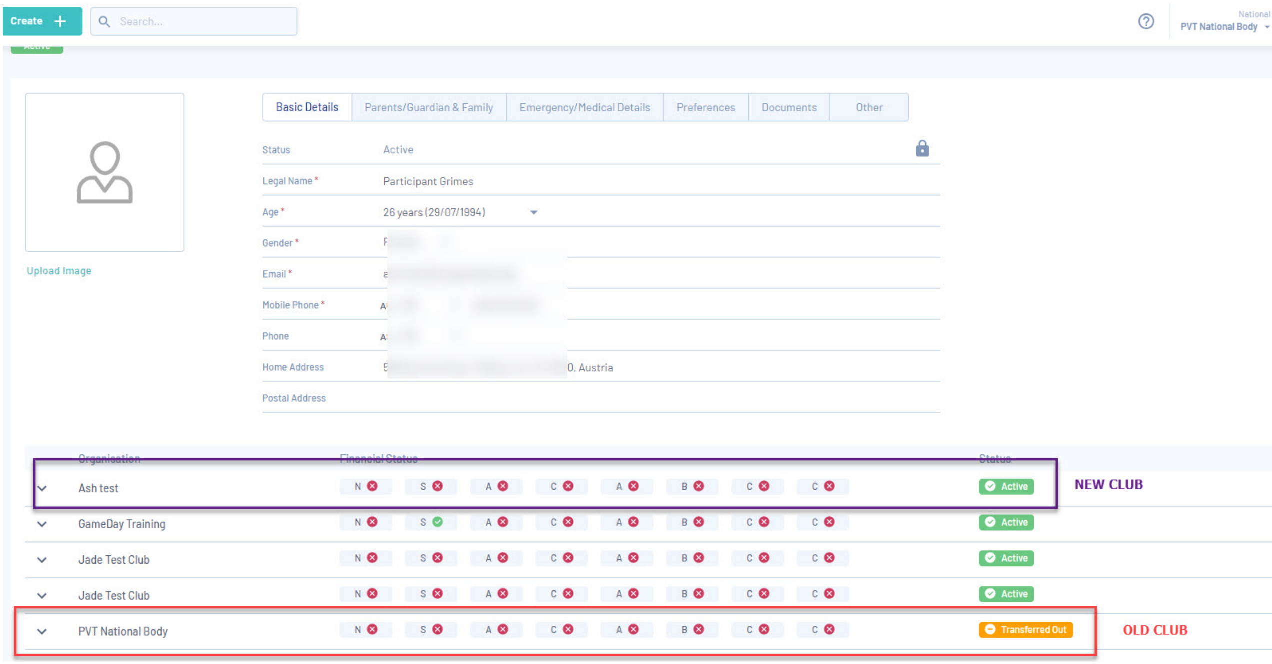


4. A pop up box will appear to confirm that you want to do this and to input any reasons why to approve/deny if you wish, otherwise click **yes**.

5. Record has been updated successfully and this member has now been approved or denied.

NOTE: the member and admin approving/rejecting the transfer will receive a confirmation email related to whether or not this clearance has been confirmed or denied.

The member profile at both clubs will reflect accordingly.



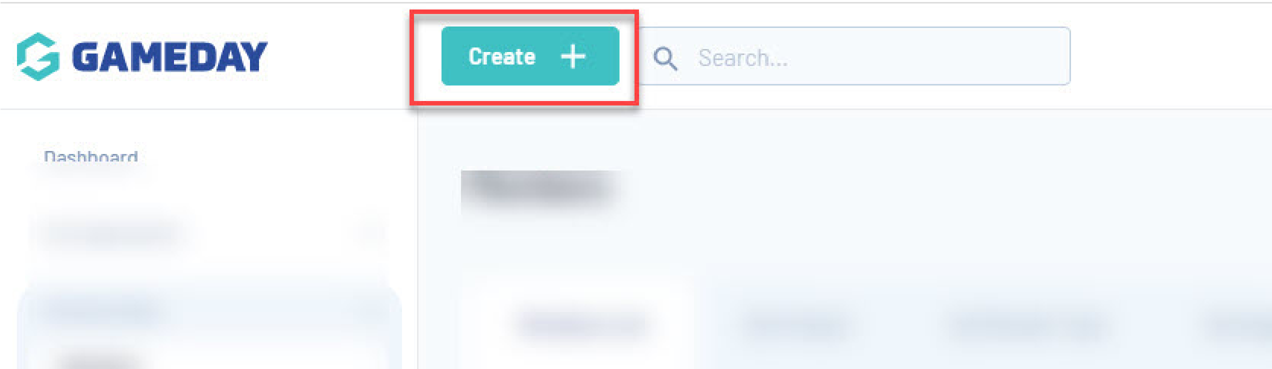
Related Articles

How do I create an email template?

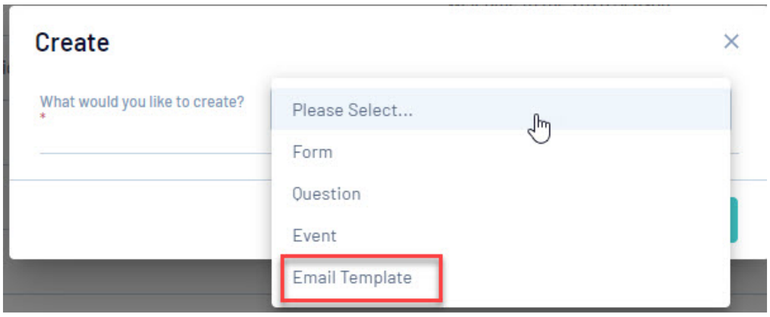
Last Modified on 21/04/2021 11:14 am AEST

You have the ability to create an email template in which has a pre-existing information already within the email that you can use when sending to members.

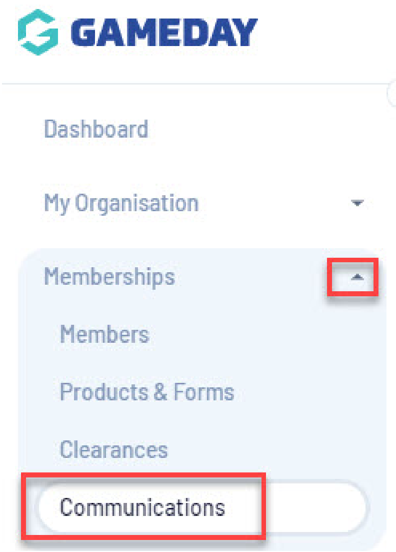
1. Click the **CREATE** button from the page you are on.



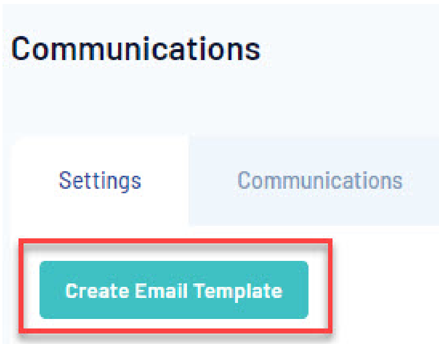
2. Select **EMAIL TEMPLATE** from the list of options.



Or click the arrow against **Memberships**, and click on **Communications**.

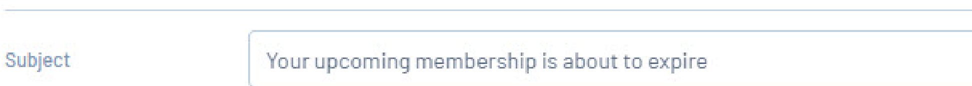


3. Under the Settings tab, select **Create Email Template**.



4. Input the **Email Template Name** - this is the name of the template that will only be shown internally so you know what this email template is about, when you go to email members.

5. Input the **Subject**- this is the subject line that will appear as the "title" when this email is sent to members.



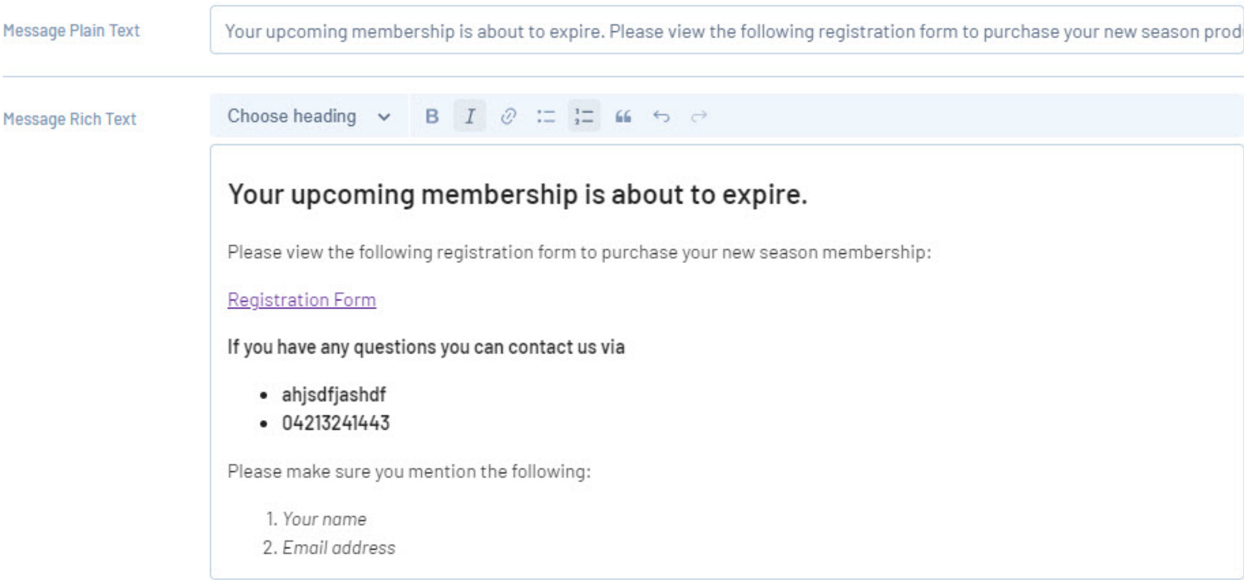
6. Input a **descrption** if you wish- this is not compulsory and will only show internally - this is basically used if you need extra information about what/who this email template is for.

7. Input the your information as **Message Plain Text** or **Message Rich Text** - this is the information that members will see in the email.

- **Message Plain Text** doesn't support bold, italic, colored fonts, or other text formats. It also doesn't support pictures that are displayed directly in the message body. Users sometimes put information is as plain text as some email accounts do not allow for fancy fonts and formatting.

- **Message Rich Text** allows you to inout fancy fonts and formatting, like bolds, italics, etc.

NOTE: currently we do not have the functionality to upload images or documents to templates. Our team is looking at allowing this in future.

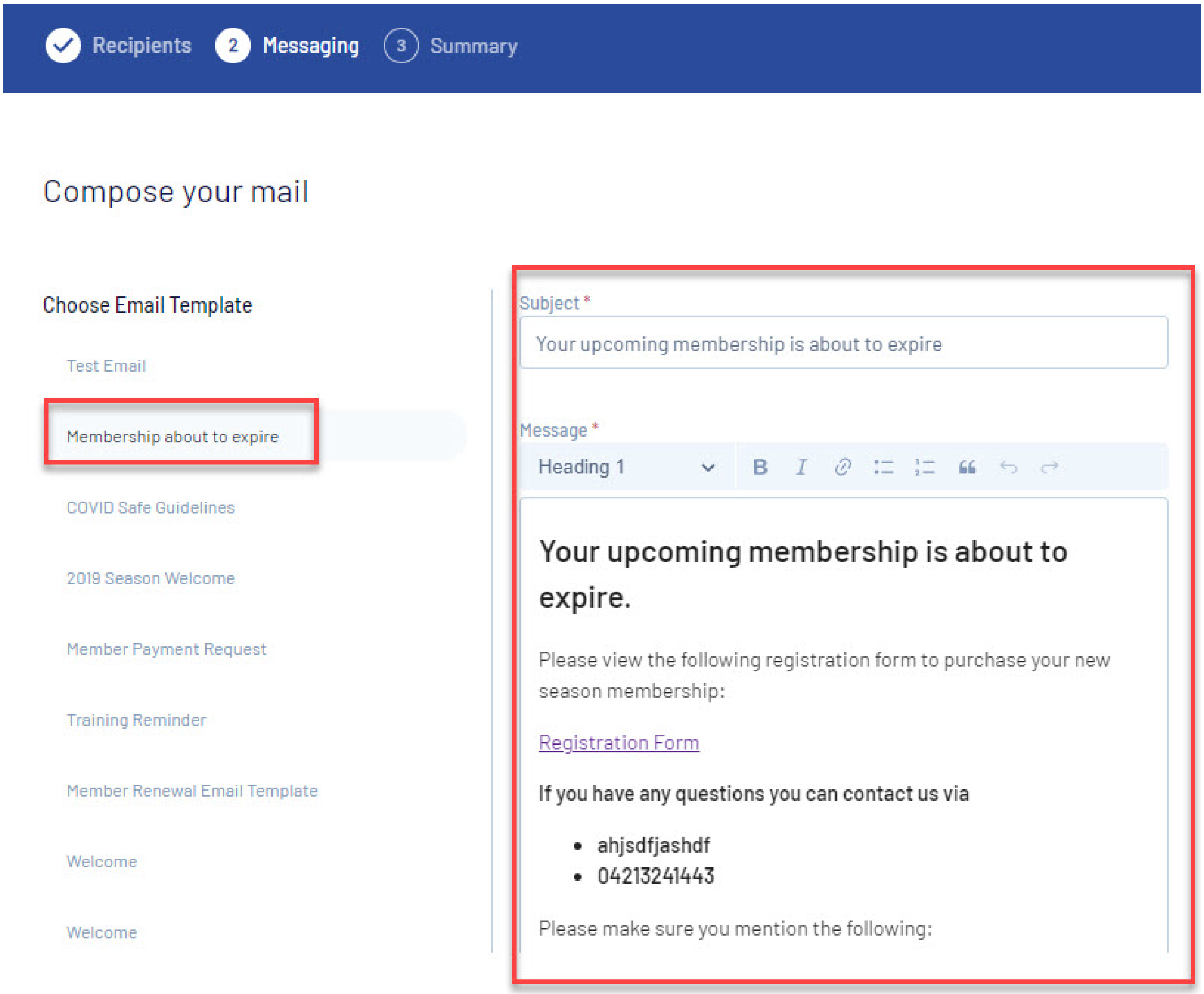


8. Once happy, click **Save**.

HOW TO I USE ATTACH THIS EMAIL TEMPLATE WHEN I EMAIL MEMBERS?

Follow the steps listed in sending an email to members.

Select the email template you created from the left hand side which will then populate the email based on the template, then continue through with the steps.

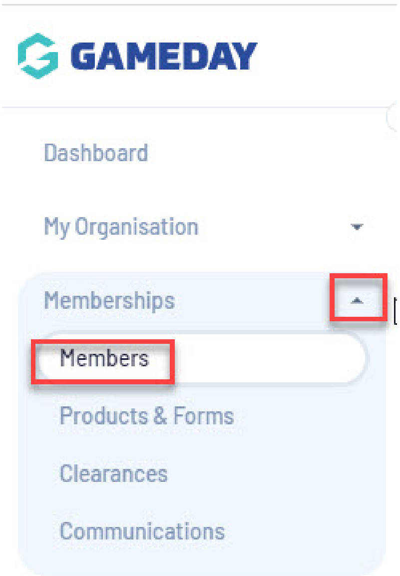


Related Articles

How do I send an email to members?

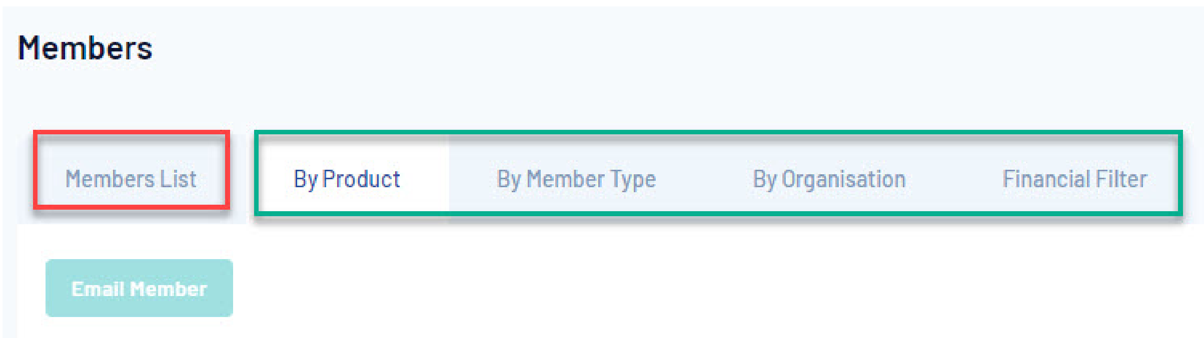
Last Modified on 21/04/2021 11:13 am AEST

1. Click the arrow against **Memberships**, click on Members.



2. Select the filter that best applies to the group of members you want to email. For example, if you want to email members who are inactive, you would select Financial Filter tab.

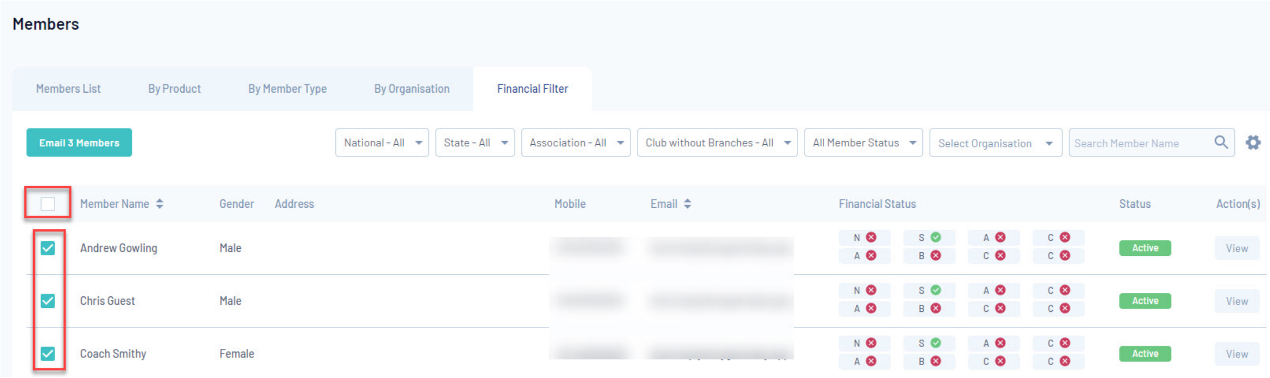
NOTE: you cannot email members from the MEMBER LIST tab however you can do so via any of the others listed tabs.



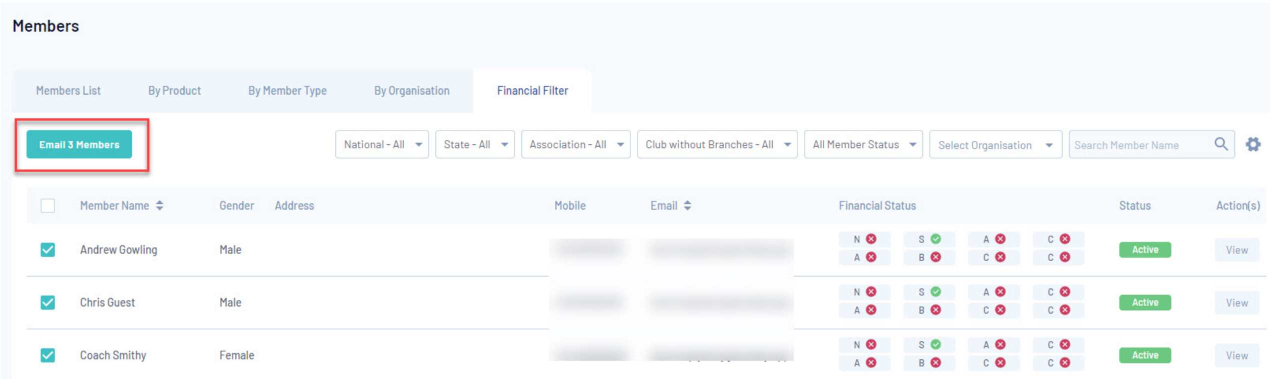
3. Filter the member list accordingly on what members you need to email.

4. Click the **checkbox** at the beginning of each line to select the member(s) you wish to email.

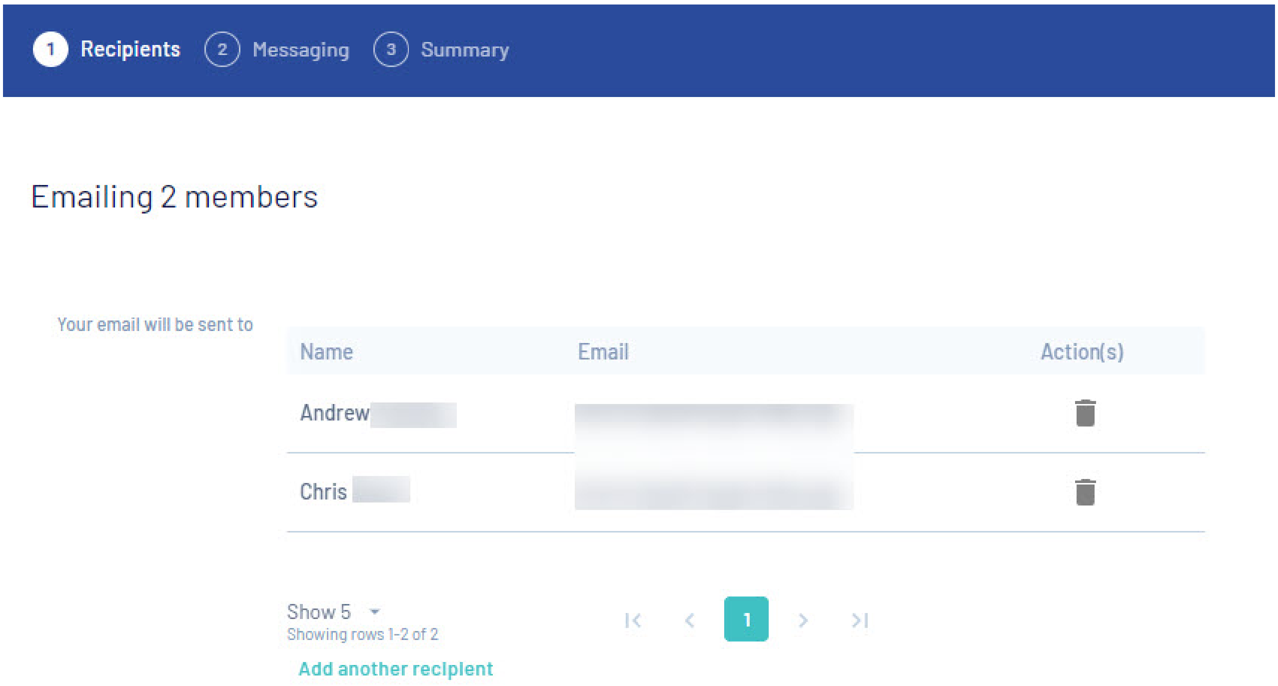
NOTE: To send an email to everyone listed on the page, check the box in the header row.



5.Click **Email Members**.



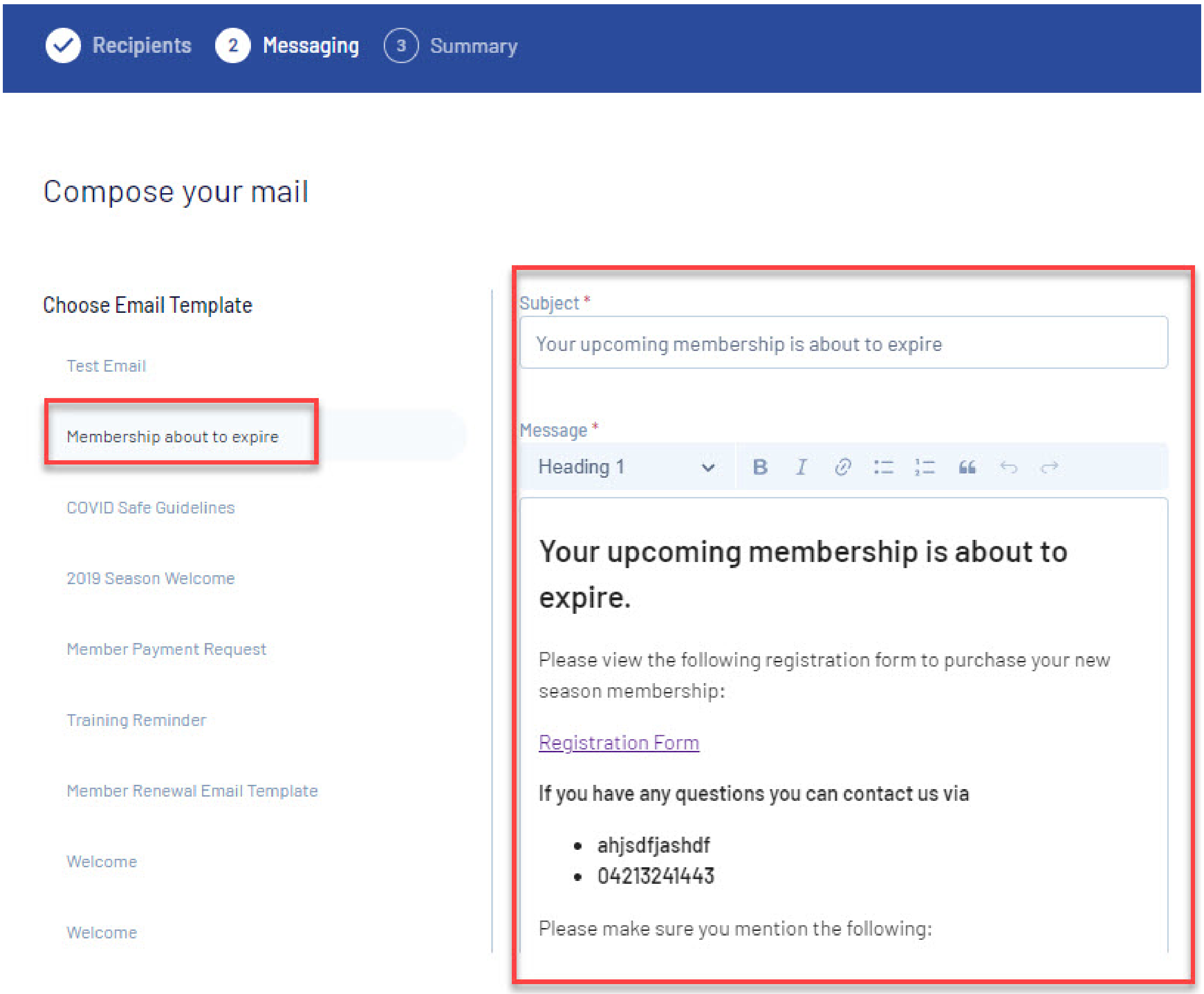
6. Confirm the recipients you want to send to or feel free to add another recipient/s. Click **continue**.



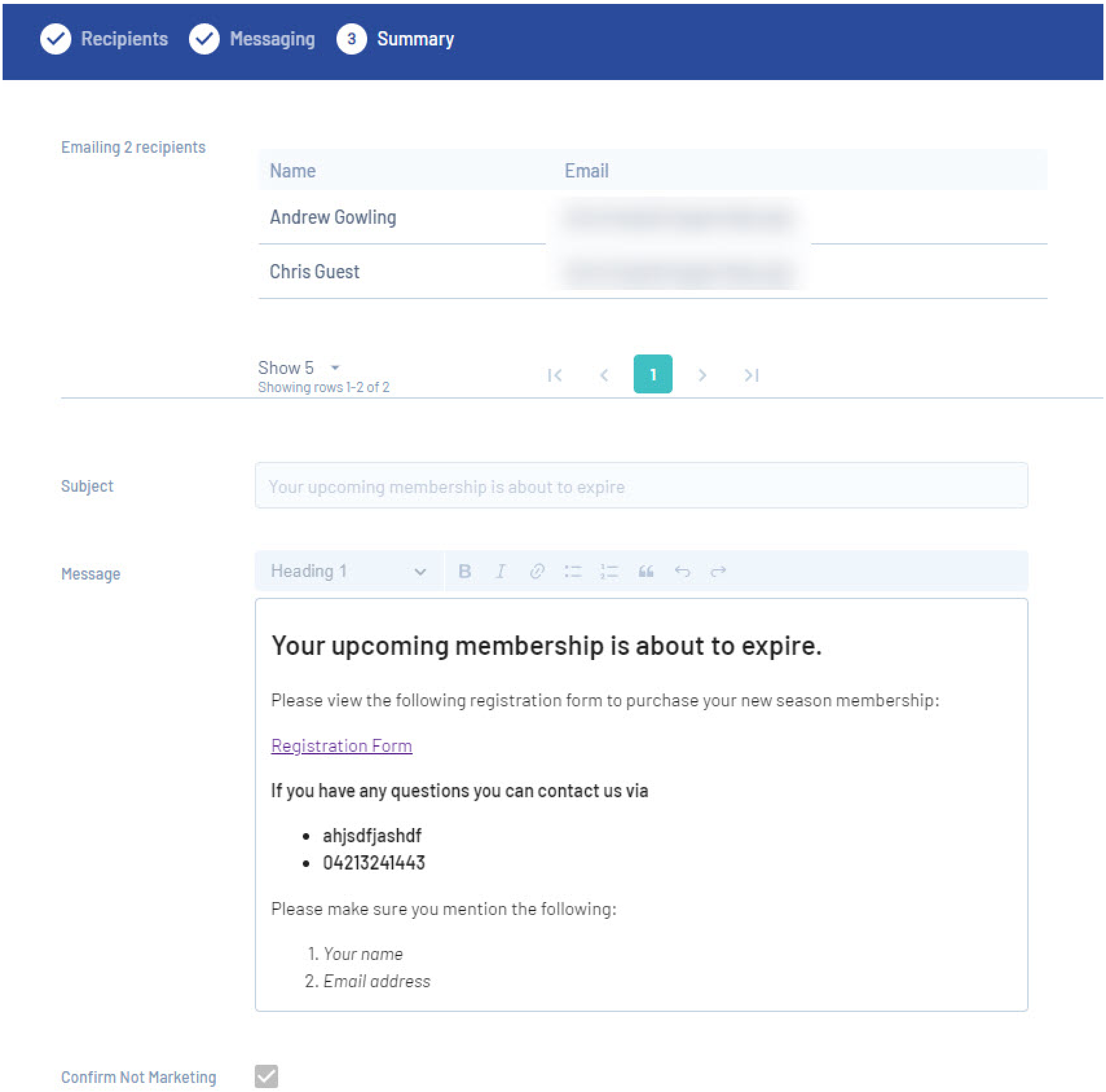
7. You can create the email you want to send here or choose an existing email template from the left hand side(if you have one created). Once composed, click **continue**.

NOTE: the "I confirm there is no marketing material in this email" is locked off my SportsTG. This just helps with making sure that emails are recevied into a members inboxs rather than their spam/junk folders.

NOTE: if the email is not in their spam/junk folder or inbox; if it is just for one or two members, it may be an issue with the members email provider, so get the member to check with them, alternatively if this is the case for all members, please contact us directly as it may be a system related issue.



8. Review the receipients and email itself. Once happy, click**confirm and send.**



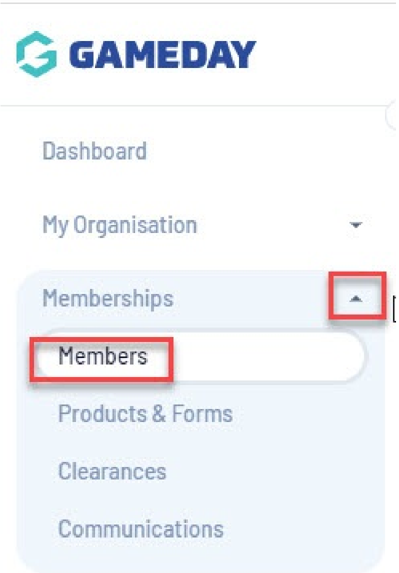
9. You should get a message about your email request has been queued> click OK. This means that the email has been sent to those members.

Related Articles

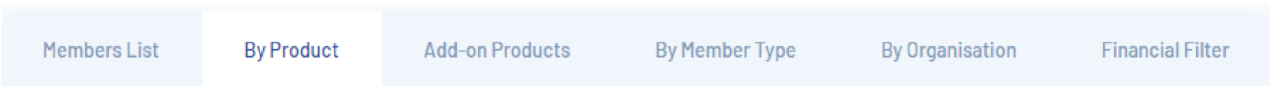
How do I target my communication to specific member groups?

Last Modified on 09/06/2022 3:42 pm AEST

1. Click the arrow against **Memberships**, click on Members.



2. Select the filter that best applies to the group of members you want to email. You can choose to filter your list by the following categories:



By Product: This will allow you to filter your member list by a specific product that has been purchased by your members.

By Add-on Product: This will allow you to filter your member list by a specific Add-on Product that has been purchase by your members, such as a merchandise item or service offered as part of your registration process.

By Member Type: This will allow you to filter your members by a specific Member Type that has been assigned to member's through your registration process. Click here for more information on creating Member Types.

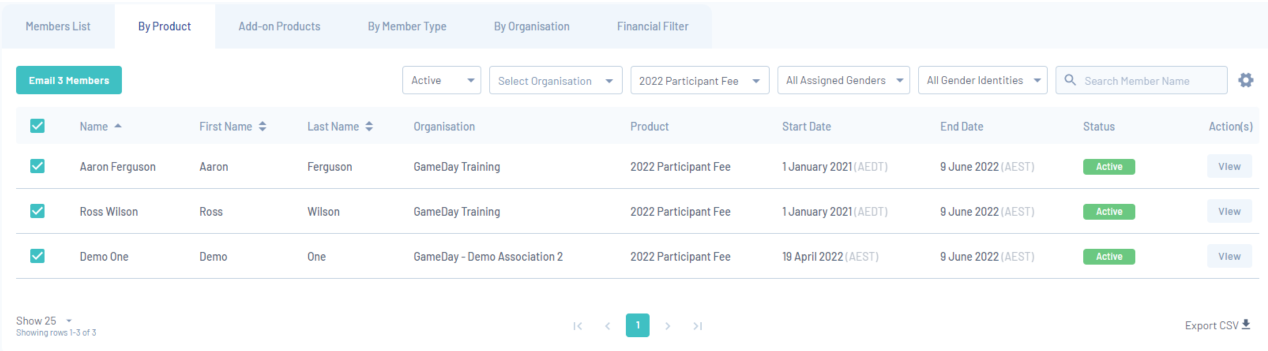
NOTE: if you are not able to see the member types tab, this means member types are locked off at a **NATIONAL or STATE level**, so you will need to speak to your parent body regarding this.

By Organisation: This will allow you to filter your member list by the organisation they are registered to.

> **NOTE:** If you do not have any organisations below you in your sport hierarchy, the By Organisation option will not apply to you.

Financial Filter: This will allow you to filter your member list based on the financial status at each applicable level of your hierarchy.

3. Once you have applied a filter, use the checkbox in the header row to send an email to all members of the filtered group an click the **Email Members** button.



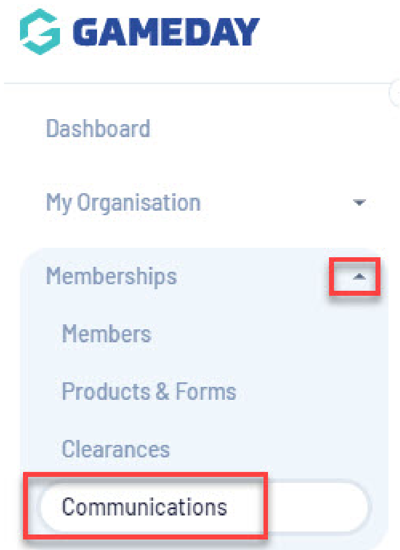
> **NOTE:** Members with email addresses that appear in your list more than once will only receive ONE email.

Related Articles

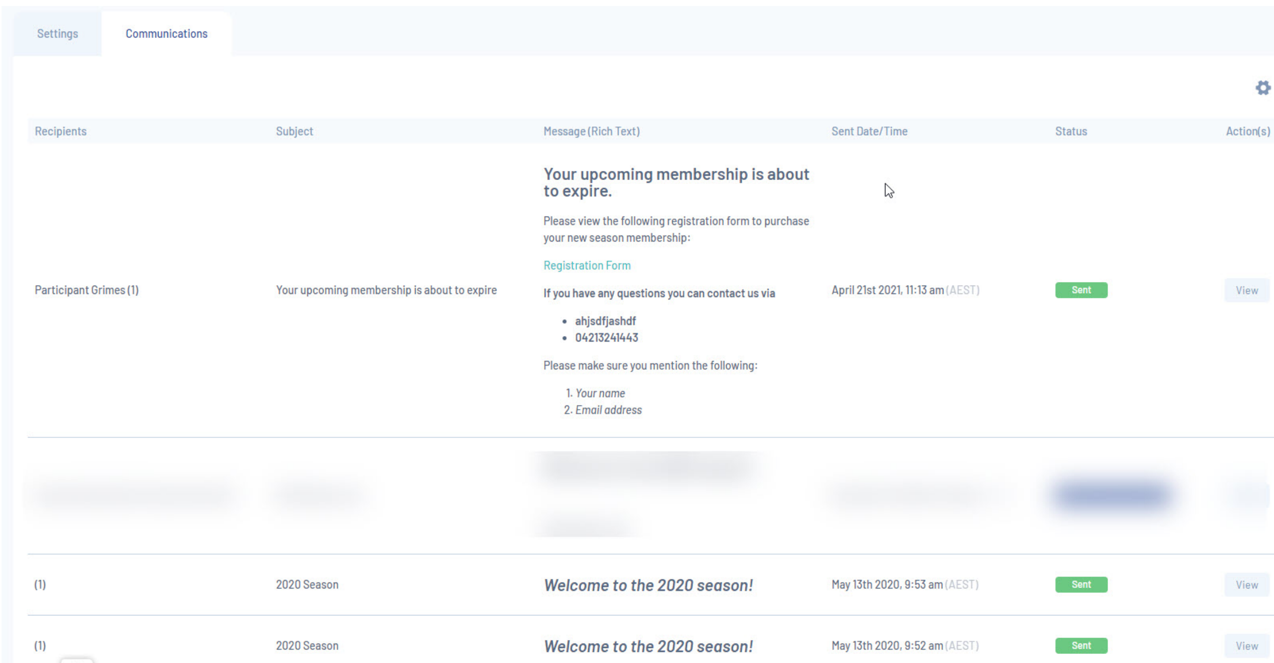
How do I view sent emails?

Last Modified on 21/04/2021 11:23 am AEST

1. Click the arrow against Memberships, click **Comminications**.



2. Click on the **Communications** tab. Previously send emails can be viewed here.



If you click **view** against the email, you will be able to see more detailed information about when it was sent out to members.

Message (Rich Text)	**Your upcoming membership is about to expire.** Please view the following registration form to purchase your new season membership: Registration Form **If you have any questions you can contact us via** • **ahjsdfjashdf** • **04213241443** Please make sure you mention the following: 1. *Your name* 2. *Email address*
Confirm Not Marketing	✓

Send Details

Sent By	GameDay Training
Status	Sent
Created Date Time	April 21st 2021, 11:13 am (AEST)
Outbox Date Time	April 21st 2021, 11:13 am (AEST)
Queued Date Time	April 21st 2021, 11:13 am (AEST)
Sent Date Time	April 21st 2021, 11:13 am (AEST)
Email Template	Membership about to expire

Related Articles

GAMEDAY

How do I create a memberID rule?

Last Modified on 18/08/2021 8:14 am AEST

Organisations have the ability to set a specifc type of rule to apply for when generating memberIDs. These rules can be based on two sub rule types:

Lifelong - This means that the member ID for a member won't change regardless of what season/year they register into. This one is the most common used by sports as most sports have the one season per year and so it is easier to identify them based off this.

Season based - this will be the ID a member will get for that particular season. If your organisation works off seasons (eg. a winter and a summer season) throughout the year and your organisation would like two different IDs for each of these different seasons then this is the option you would use.

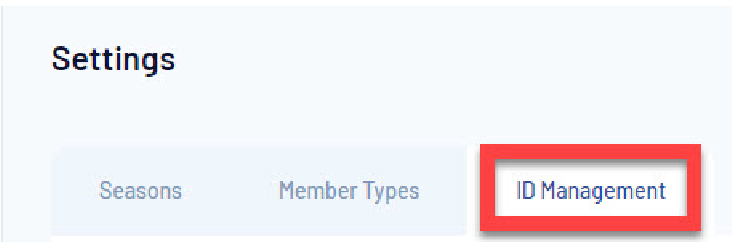
NOTE: if you are unable to see the following within your organisation, it will mean your sport/national body has not enabled you to manage this as your level, so please speak to them directly if you would like to manage your own memberIDs.

How to create and apply a memberID rule can be done via the following:

1. Log into your organisation.

2. Click the drop down arrow against **MY ORGANISATION** and click **SETTINGS**.

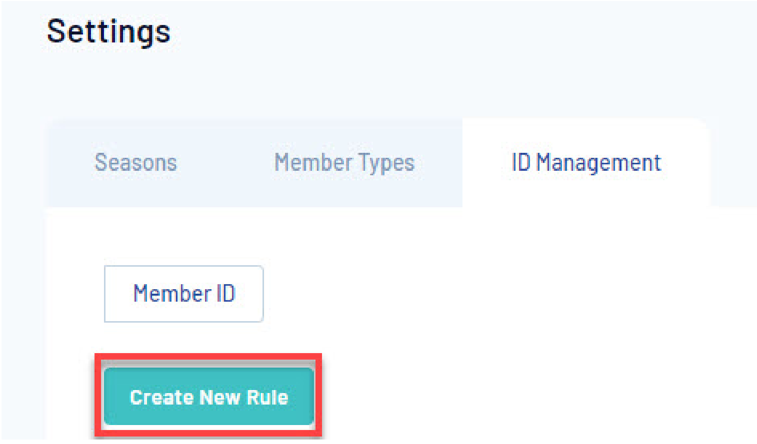
3. Click the **ID MANAGEMENT** tab.



4. The **MEMBER ID** tab should already be defaulted.

If you can see Organisation ID and Event ID, please ignore these tabs for this particular set up- articles on how to set these up can be found within the support centre under the relevant menus.

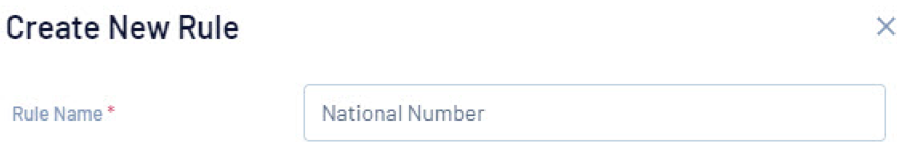
5. Click **CREATE NEW RULE**.



6. A pop up box will appear where you can enter parameters for this rule.

NOTE: as you input the following values the bottom of this screen will provide an example of what your IDs will look like if you choose those certain values, you can chop and change as you wish.

6a. Input a **name** for this rule.

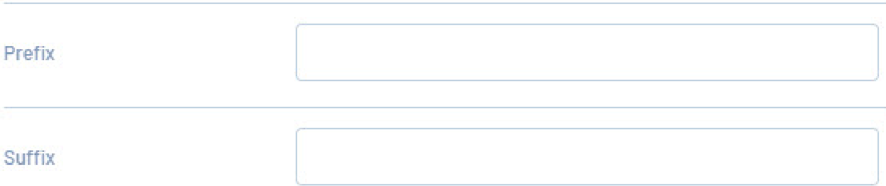


6b. Select the **rule sub-type** you wish to base this rule off.

If you select **SEASON BASED**, you will be asked to select the relevant season you want to base this rule off.

6c. **PREFIX/SUFIX (optional)** - here you can choose if you want a prefix or suffix for your rule - these fields are optional and can be used if you want to more easily idenitfy what level of rule this is.

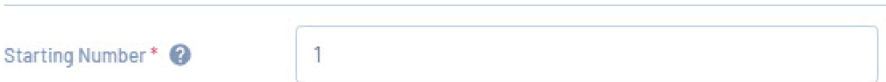
(For example; say if you want this memberID to reflect that it is a national ID then you can input NAT or some sort of acronym for your sport before or after the ID so when the ID is created this is reflected and more easily identified.)



6d. Input a **starting number** you wish to have for these IDs to start at.

Most organisations choose to start with 1 however you can choose whatever value you wish to start with.

(Starting number cannot be more digits than maximum number)

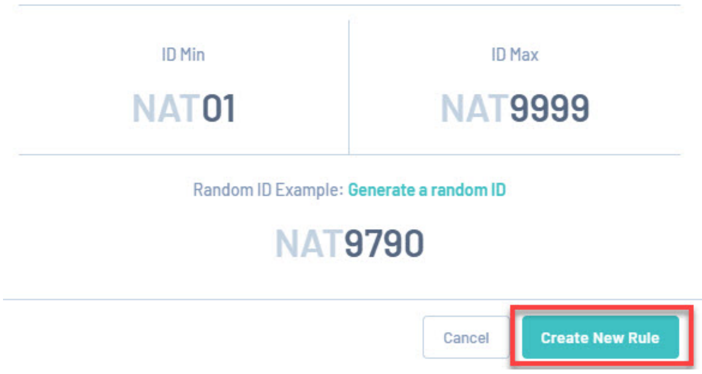


6e. Input a **max number** for how long your ID will be (can be between 2-10 digits long).

If you are a big organisation like a national sporting body and have quite a few thousand members register throughout the year then you would most likely want to set the max number to be at least 10 digits long. Whereas if you are an organisation that only gets a couple of hundred members register throughout the year then you'd maybe only want the max number to be 3 or 4 digits long.

You will notice based on the values you have inputted above there is an example provided of what your IDs will look like based on the values, so feel free to chop and change until they are set as how you want.

7. Once happy with values selected, click **CREATE NEW RULE**.



8, This rule will now be active and automatically applied as the rule for IDs when members register manually or via a form.

Related Articles

Can I manually change a memberID?

Last Modified on 04/11/2021 10:17 am AEDT

Yes, admins do have the ability to manually edit a members ID depending on the set up of their sport. Admins at higher levels have the ability to edit lower level memberIDs (if enabled) however lower level organisations do not have the ability to edit higher level member IDs.

NOTE: if the ID was not created at your level (e.g a state or national ID) please contact the relevant organisation who can change this for you.

To manually change a member ID:

1. Click on the drop down arrow against **MEMBERSHIPS** > click on **MEMBERS**.

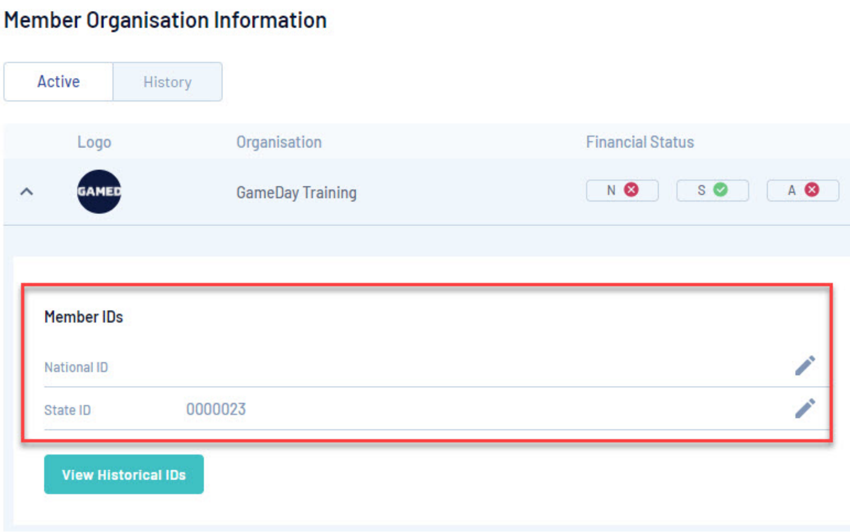
2. Search for the relevant member.

3. Click VIEW against their name within the member list.

4. Scroll down to the **MEMBER ORGANISATION INFORMATION** heading > click the drop down arrow against their organisation.

5. The memberID field will be visible under the MEMBER IDS heading section of the profile.

NOTE: if enabled, one or more memberID fields may be visible within the profile depending on the set up of your sport.

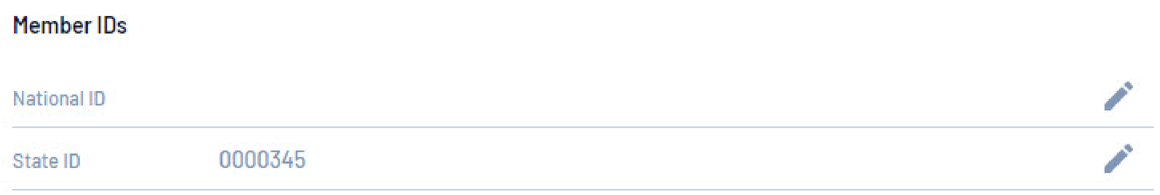


6. To edit the memberID click the **EDIT (PEN) ICON** against the relevant memberID.

NOTE: An unqiue ID cannot assigned if it is already assigned to someone else. You need to "free it up" before assigning this ID.

7. Input the manual ID you wish this member to have, then click **UPDATE**.

8. This new ID will be reflected within the members profile.

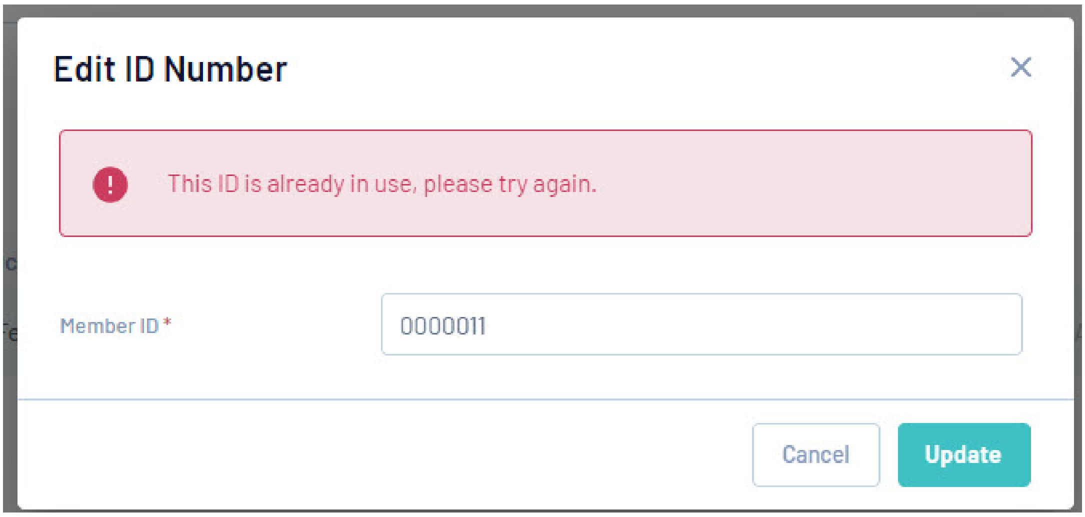


I can see the edit (pen) icon however when I click on it I cannot edit this field?

If you can see the edit icon against the member profile but it will not allow you to edit this field it will mean that memberIDs are not managable at your level so you will need to speak to your sporting body and they will be able to edit this field for you or make changes so your level can make this change (if the ID is for your level).

I am getting an error when I try to input a unique memberID how can I fix this?

If you are getting an error message (like the below) about the "ID is already in use", this means that another member within the sport/organisation already has this specifc ID, so you will need to search for this member ID within the search bar > change that memberID for that member to something else > then go back to your original member and update their record to reflect this memberID.



Related Articles

Step 1: How do I create an event?

Last Modified on 17/11/2021 3:44 pm AEDT

Events can be created from scratch or if your via an event template. To see how to create an event via the events template please click here.

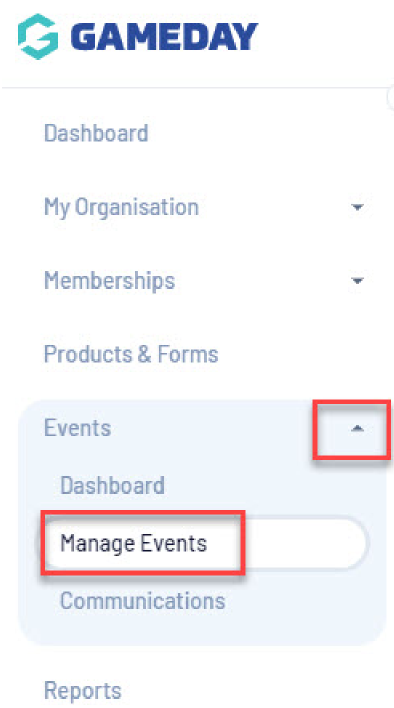
If you have multiple events for multiple age groups, you will need to create each age group event separately.

NOTE: the events module will need to be enabled for your organisation first. Please contact our support team for more information on how to get this enabled.

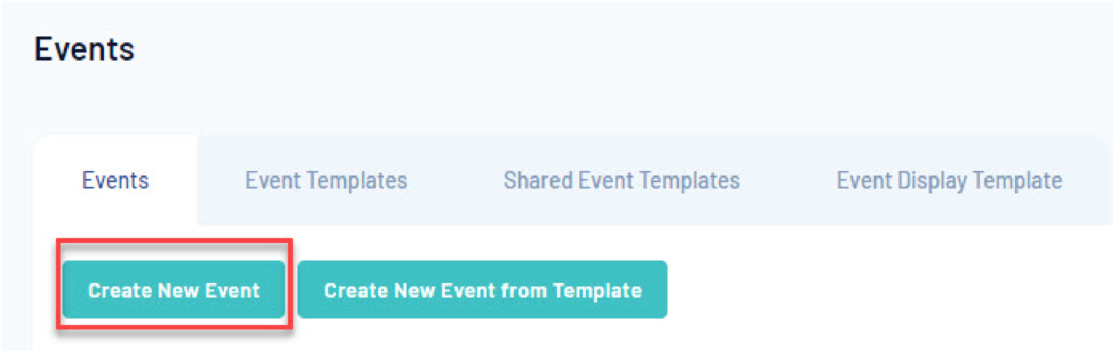
To create an event from scratch please see the following:

1. Log into your organisation

2. Click the arrow against **EVENTS** tab and click **MANAGE EVENTS**.



3. Under the **EVENTS** tab, click on **CREATE NEW EVENT**.

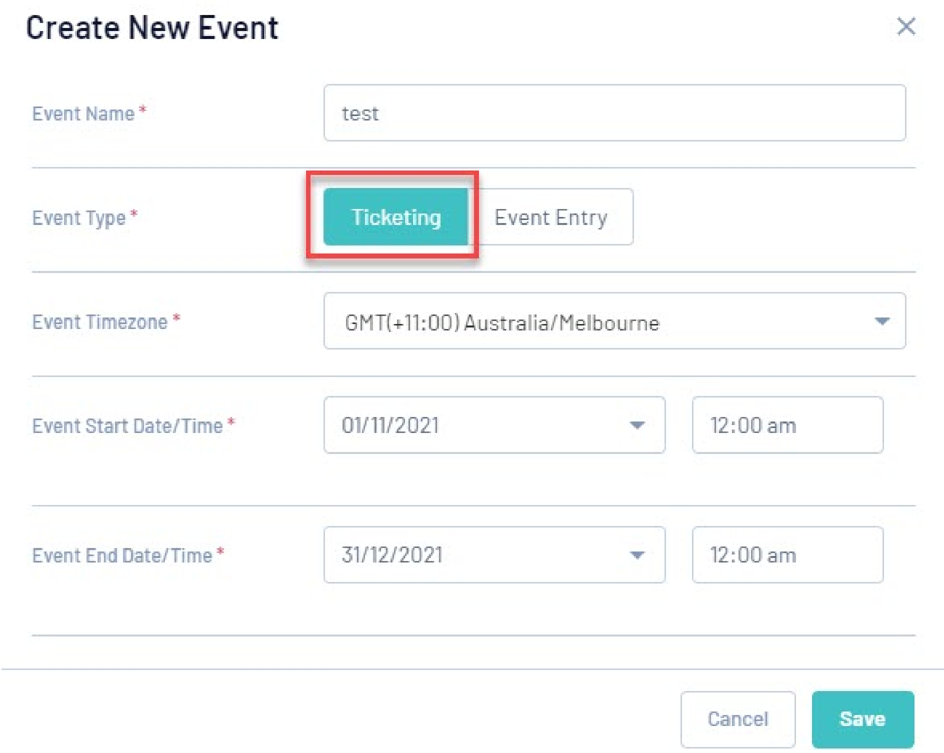


4. Input the event name

Events can be created one of two ways, via a ticketing event or an event entry event. A ticketing event is used for most events, while an event entry event is used for athletic events like marathons etc. More information on how to create an event entry event can be found here.

5. Keep the **TICKETING** button selected.

6. Input an event timezone and start date/time and end date/time.

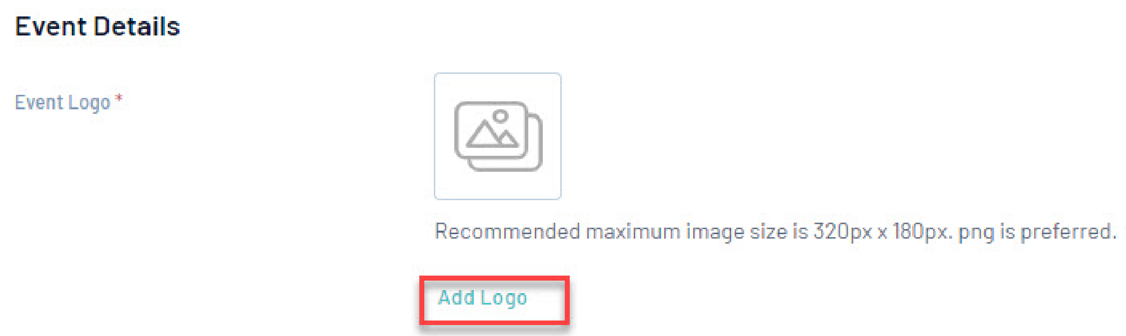


You will then be taken to a screen where you can put in the rest of the event information.

NOTE: you won't be able to save this page until you fill out all the required fields.

5. Add in the *Event Logo*. Click **ADD LOGO** to add an image.

- If the event does not have a particular logo input the logo of your organsation instead.
- Recommended image size is 320pixels x 180pixels in *png* or *jpeg* form.



6. Check and confirm the event name and start and end dates- change if needed.

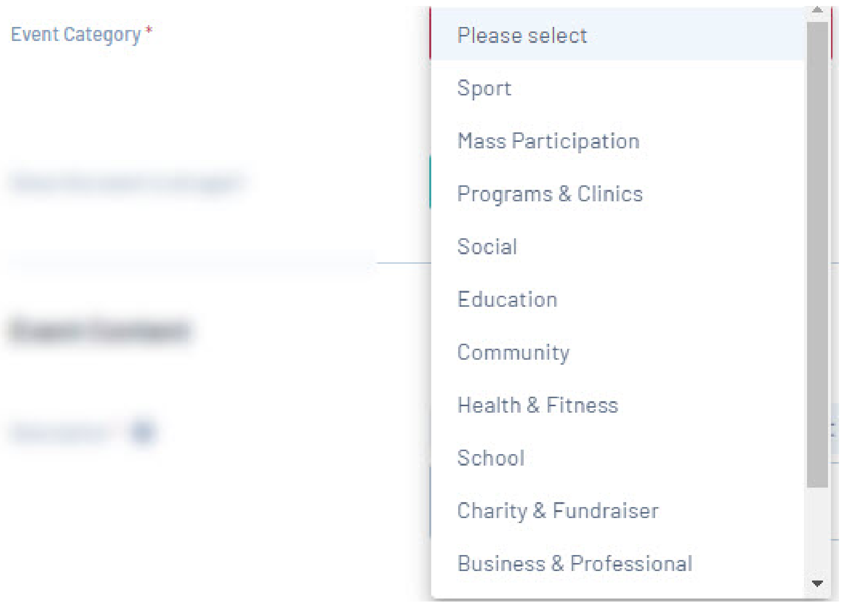
7. Input the **maximum number** of products that can purchased for this event.

- If the event can have an unlimited amount of products purchased tick the **NO LIMIT** checkbox.

8. Select the **GENDER** the event will allow.

- If the event only allows a specific gender select the relevent gender.
- If the event allows all genders then click the **ANY** option.

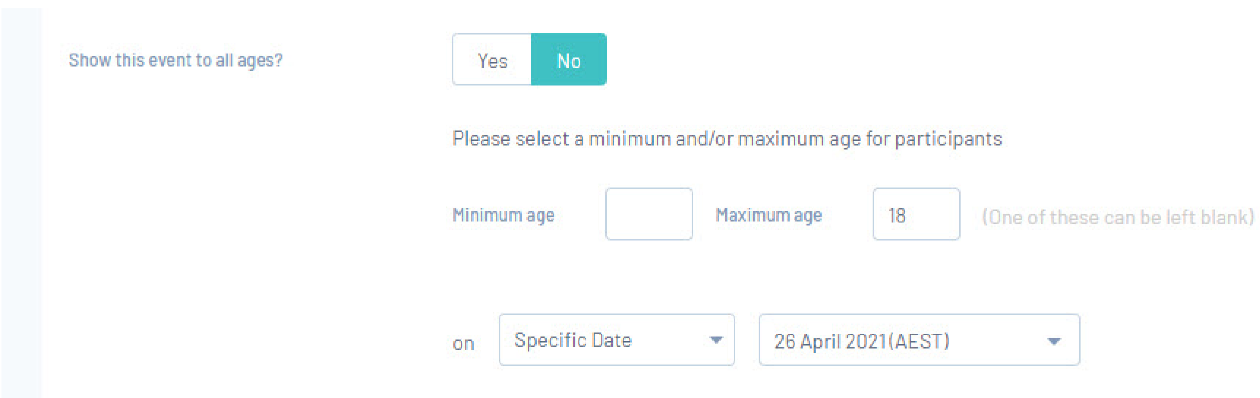
9. Select the **EVENT CATEGORY.**



10. Select if the event will be available for all age groups or only certain age groups.

- If the event is open to all age groups, select**YES**.

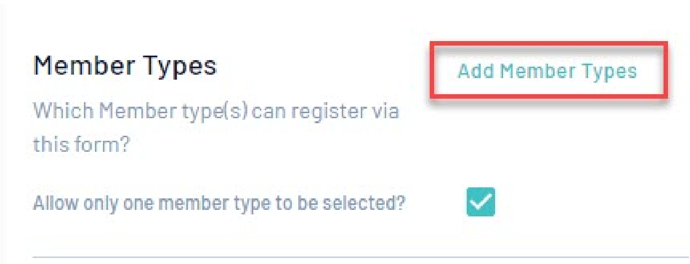
- If the event is only open to certain age groups, click**NO** and input the **relevant age group** and select an option based on how the age group is calculated. You can choose from the following:
  - Season Start Date
  - Season End Date
  - Specific Date
  - Registration Date (the day they register to the event).
- If the event does not have a minimum or maximum you can leave one of these blank.



11. Select at least one **MEMBER TYPE** that will be used for entrants. Click**add member types** button to select from the list of event member types.

You have the ability to choose from the following member types when setting up.

- Default Event Participant Member type - this is the default member type available for all organisations if your events are not related around entrants having a specific member type once registered.
- Create your own event member types - this option allows you to use your own event member types if entrants need specific member types when registering (e.g junior sprinter, senior shotput). You can create these here.



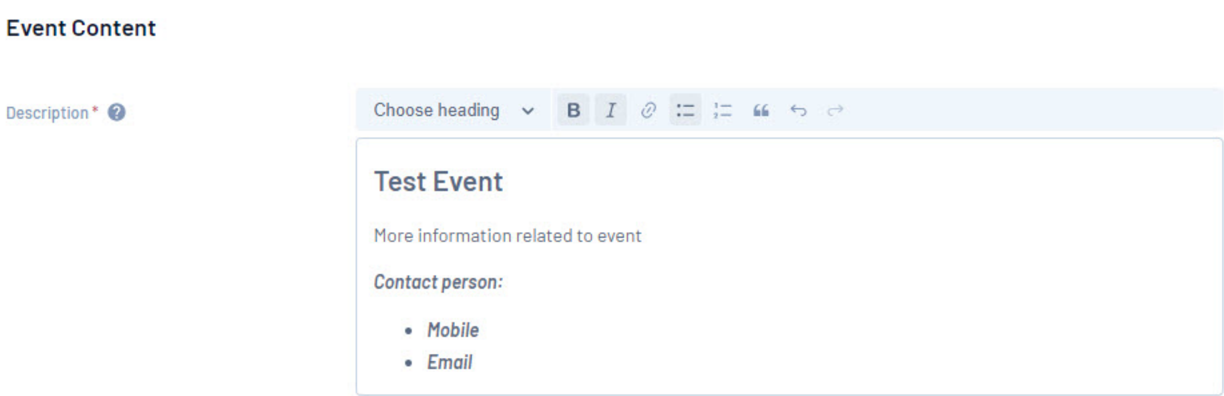
11a. You can also choose whether or not you want entrants only having the one member type selected when registered or multiple.

If you wish for entrants to ***only select the one member type*** when registering (e.g only be a junior sprinter) then tick the checkbox against "allow only one member type to be selected".

If you wish for entrants to be able to ***select more than one member type*** when registering (e.g they can register as a junior kicker and a junior sprinter) then leave this checkbox unticked.

12. Input a **DESCRIPTION** for the event. This will include general information, items to bring etc.

- You have the ability to bold certain information and add in dot points.
- If you wish to inlcude an external URL that links to another website please make sure to input http://www. or . before the URL as this will enable the website to be viewed when registering or on the event landing page. If you do not put this before the URL then it will not be able to be viewed properly if a user clicks on the URL.



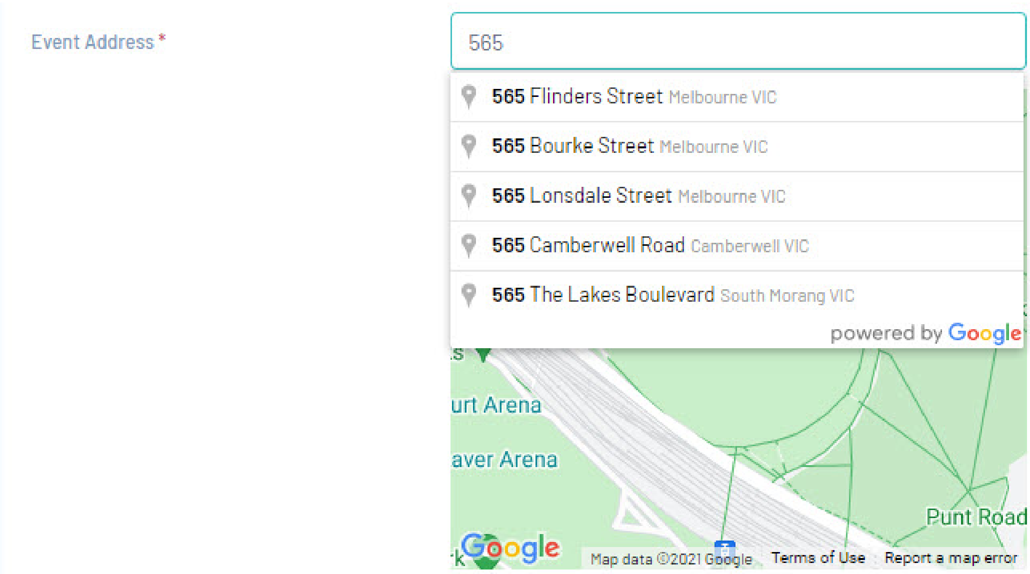
13. Input the **CONTACT INFORMATION** for the event- this will be who entrants will contact if they have any questions about the event.

- In regards to the phone number please ensure the correct **COUNTRY CODE** is selected based on the country of the event (if not already pre-selected).

14. Input a link to the **WEBSITE** where this form can be found or the relevant website to where more information can be found on the event. This will be usually your club website or an external website.

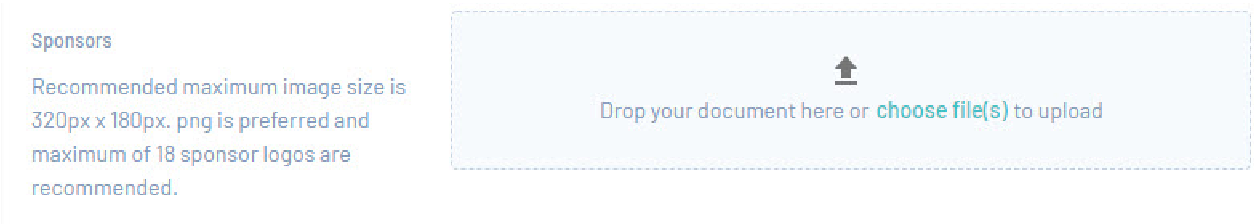
15. Input **ADDRESS** of where this event is being held. If the venue has a specific name you can also put this in there (venue name is optional).

- As you input the address of the event, it will pick it up so you can easily select it.
- Input the venue name if the address doesn't include the name of the venue (e.g if it is a local named footy oval)



16. If you have any **sponsors** that are sponsoring your event, these can be uploaded here. Click on **CHOOSE FILES** to upload your images. This is optional.

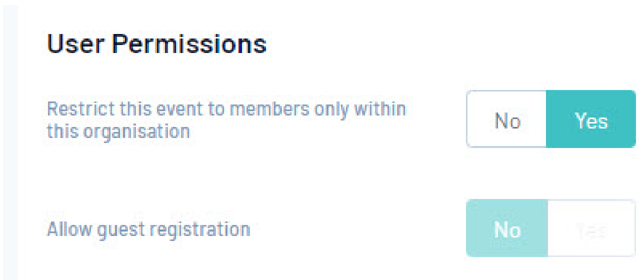
Recommended image size is 320px x 180px, with a MAX of 18 sponsors.



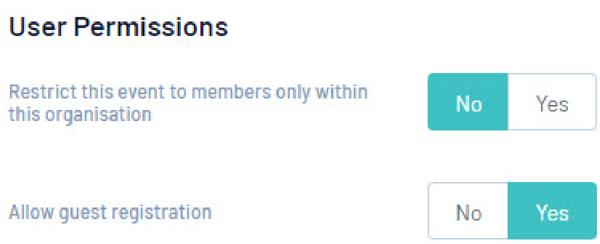
Under **USER PERMISSIONS** you can select where or not this event is open to everyone or just members.

17. Select if the event is open to everyone (members and non-members) or just members.

- If the event is open to **JUST MEMBERS** who are currently registered or have been previously registered to your organisation then click **YES** on the **RESTRICT THIS EVENT TO MEMBERS ONLY WITHIN THIS ORGANSIATION.**



- If the event is open to **EVERYONE** then keep the option set to **NO** for **RESTRICT THIS EVENT TO MEMBERS ONLY** and select **YES** to allow **GUEST REGISTRATIONS** (those that are currently not members of your organisation).



18. Once happy with all the information input related to your event, click **SAVE**.

To add products to the event, please see Step 2: How do I add products to the event?

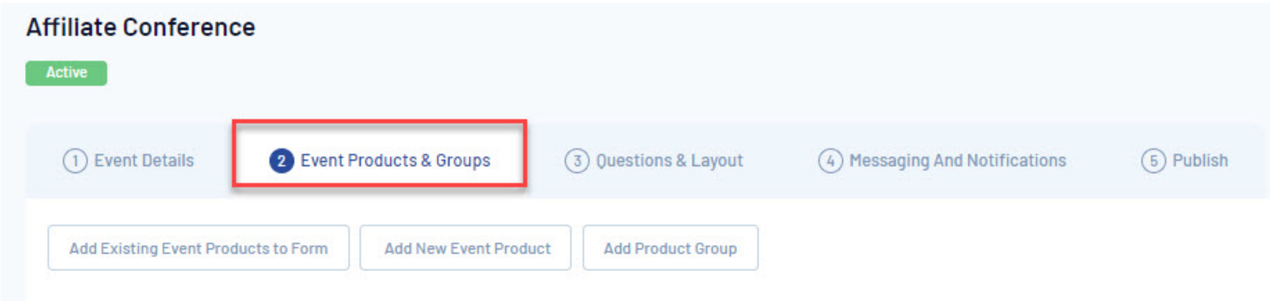
Related Articles

Step 2: How do I add products to the event?

Last Modified on 13/12/2021 10:52 am AEDT

Following on from Step 1: Creating an event you will now be able to add in event product/s for the event. In this section you will also have the ability to add a product group to your event if you have multiple products that apply to the one group, this will also be explained here.

1. Click on the **PRODUCTS & PRODUCT GROUPS** tab.

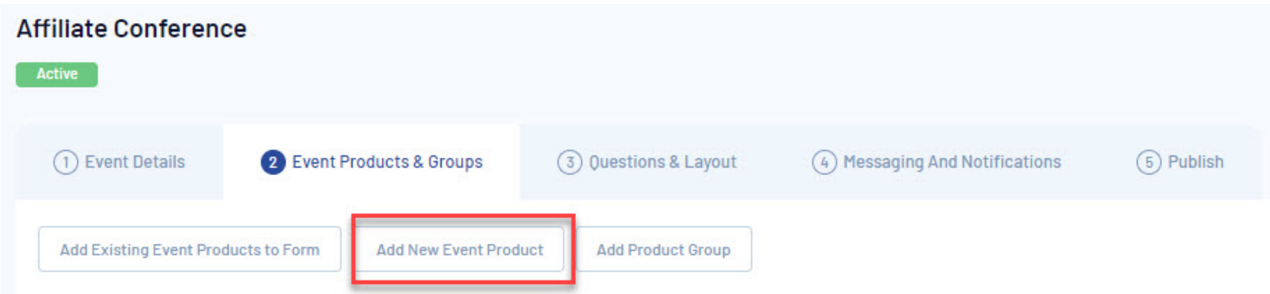


Here you can either **ADD AN EXISTING PRODUCT** to the form or **ADD A NEW PRODUCT**.

> NOTE: only EVENT type products can be added to an event form.

ADD A NEW PRODUCT

1. Click on **ADD NEW EVENT PRODUCT**.



2. Input the **NAME** of the product.

3. OPTIONAL: Input a description for the product if needed.

4. Input the **PRICE** for the product and tick whether or not the product price will include GST or not.

5. Select the **PAYMENT OPTION** for this product.

- **Payment Gateway Only** - means the entrants MUST pay online within the form
- **Payment Gateway or Manually set Product as Paid**- means the entrant doesn't need to pay online if they don't want/need to - if the entrant can pay via cash, etc and then you manually mark this as paid when they have paid for the product.

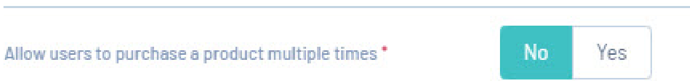
6. Input the dates that this product will be **AVAILABLE FROM and TO** on the form. This would be set to dates before the event starts.

7. Select the member types a member will be granted when purchasing this event product.

8. Input the **QUANTITY LIMIT** for this product. Most event products will only be able to purchase once, so feel free to leave this blank or input this to 1.

If an entrant can purchase this as many times as they want click the**NO LIMIT** option.

9. Select whether or not you want an entrant to select this more than once. If you only want to allow the entrant to select this one, then leave this as **NO**.



If you want an entrant to purchase this more than once, then change this to yes, and then input the limit on how many of this product an entrant can purchase.

10. Select the **STATUS** for this product - for this to be visible on the form set this to**ACTIVE**.

Click **CONTINUE**

11. Select if you want to show this product to all**GENDERS** or just a specific gender.

If the product you are creating is only for males to see then set this to male and vice versa. If all genders can view this product keep this set to **ALL**.

12. Select the **AGE GROUP** you want this product to display for.

If you want it shown for **ALL** ages, then keep this as **YES**.

If you want this shown for only a certain age, click**NO** and input an **age range** and how the age range will be calculated.

13. *OPTIONAL:* select if this product requires another product to be selected or purchased before this product can be purchased than assign a DEPENDENT PRODUCT.

If this product can be purchased on it's own, keep this set to**NO**.

Click **CONTINUE**.

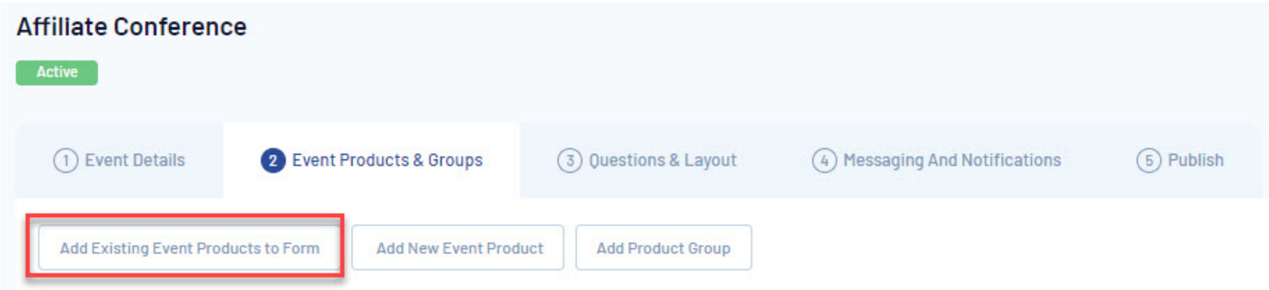
14. Please review the information you have put for this product and go**BACK** if you need to update information. If you are happy with the information click **CONFIRM and SAVE.**

15. This product has now been added to the form.

ADD AN EXISTING PRODUCT TO FORM

If you select this option this will mean that you have already created your event product outside the form via the **PRODUCTS & FORMS** > **PRODUCTS** page in which you will pre-select and add this to the form.

1. Click on **ADD EXISTING EVENT PRODUCTS TO FORM.**



2. Search or scroll through the pages to find the relevent event product/s you want to add to the form.

3. Tick the checkboxes against the products you can to add to the form, then click**ADD**.

4. Click **SAVE** to save these products to the form.

HOW TO MARK A PRODUCT MANDATORY

To mark a product within the event form as mandatory:

1. Click the drop down arrow against the product name

2. Click the **MARK AS MANDATORY**.

3. Click Save.

HOW TO REMOVE A PRODUCT FROM THE EVENT FORM

To remove a product from the event form, this is the same as per a normal form:

1. Click the drop down arrow against the product name

2. Click the **REMOVE FROM FORM.**

3. Click Save.

For instructions on how to add a product group, click here.

Once done, move onto Step 3: adding questions.

Related Articles

Step 3: Add Questions

Last Modified on 28/04/2021 9:42 am AEST

Once you have completed Step 2: Add products to form, you can now add questions to the form that you would like entrants to answer.

This is the same as a normal form set up when adding questions. Please see the following instructions on how to add questions to the form.

Related Articles

Step 4: Creating a Registration Success Message

Last Modified on 02/02/2022 11:25 pm AEDT

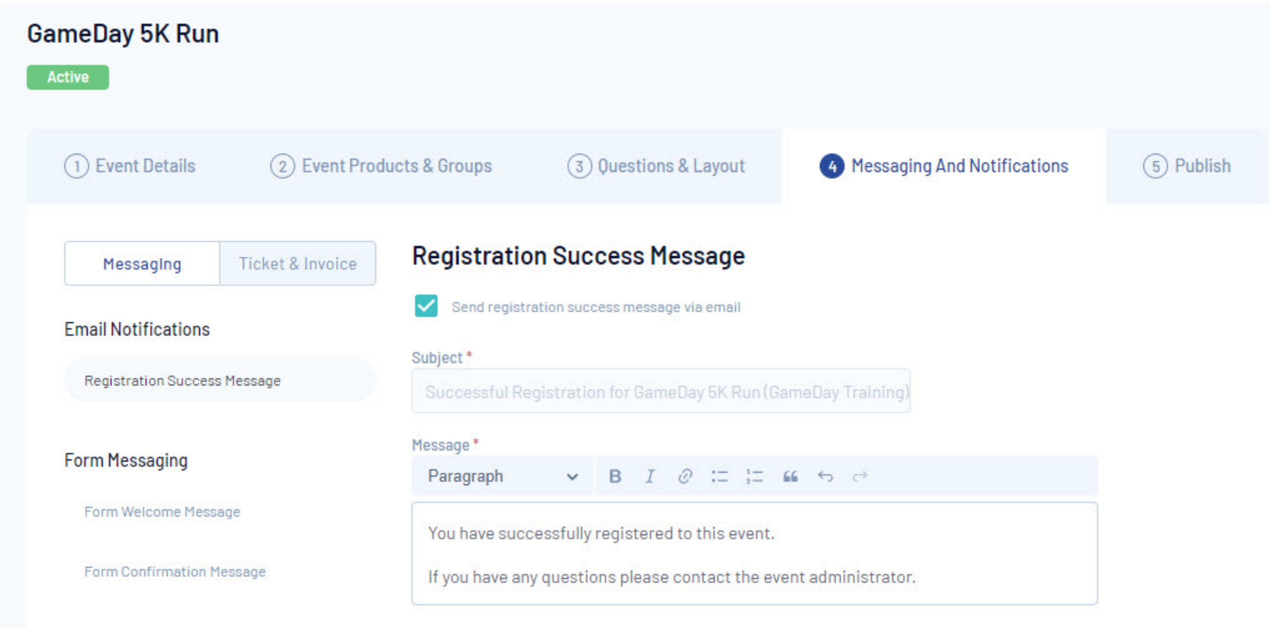
Once you have completed Step 3: Add questions, admins can create a successful registration message for the event form. This will be slightly different to the message on your general registration form, it will be best to customise it related to the event itself.

1. Click on **MESSAGING AND NOTIFICATIONS**.

2. Input a subject line for the successful registration message - one will already be defaulted, feel free to change this.

3. Input information for the message.

There is no specific wording needed here, you can put whatever you want to in the message - but make sure it relates to the event. An example is here:



You will see a checkbox within this section, where you can choose whether or not you want to send the registration success email to members or not. Tick the box if you wish to send this email to members upon successful registration. Unticking this box means that members will not receive a successful registration email after completing registration.

If you wish to add a form welcome or confirmation message, pleaseclick here on how to do this.

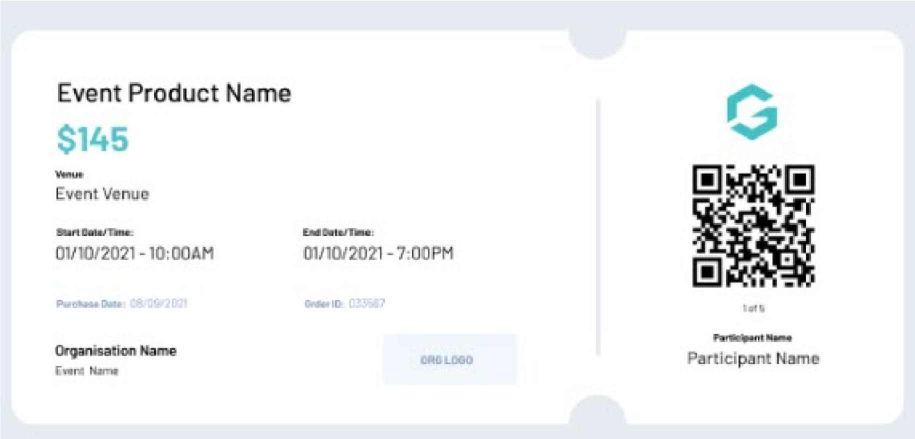
TICKETS AND PAYMENT RECEIPT EMAIL

The information in the ticket and Payment Receipt Email will be**hardcoded and cannot be customised**, however the information will be pre-filled out with the information related to the registration and products purchased.

This is defaulted to generate when an entrant registers so if you wish.

The ticket aspect of the registration will have information related to that specific product purchased and it will have it's own unique QR code that admins can scan this for the member at the event upon entry. If an entrant purchases more than one product each ticket will have it's own unique QR code.

The entrant can view this QR code within the GameDay app and admins have the ability to scan these codes within the app as well.



Move onto Step 5: Publish.

Related Articles

Step 5: Publish

Last Modified on 28/04/2021 9:50 am AEST

After completing Step 4: Messaging and Notification, admins now decide when this form will go active and the links that entrants use to register.

1. Click on **PUBLISH**.

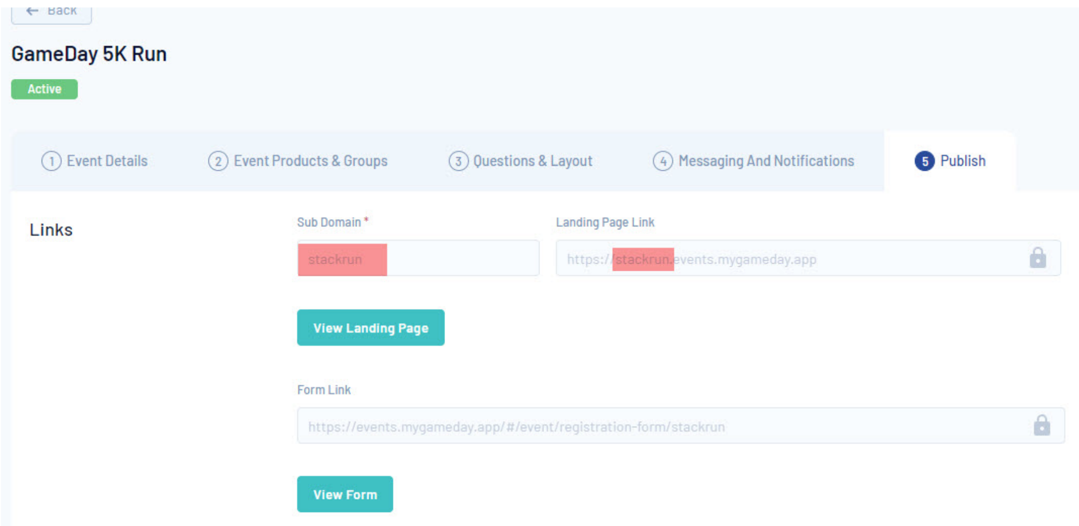
2. Input a name for the **SUB DOMAIN LINK** (aka the landing page/home page for the event) refers to the name you want to show for the event link. The sub domain can be the name of the actual event or something else.

NOTE: Please make sure this subdomain is the one you want before saving as once it has been saved you cannot change it. If you need to change this sub domain you will need to create a new event from scratch.

If the event will only be used once, you can just name the sub domain the event name- doesn't have to be the event name, it can be whatever you choose.

If the event will be used more than once (annually etc), you can name the event something specific (e.g Charity Run 2020) but then set the sub domain to be just the event name itself (e.g charityrun) so that way you can use the same form and have the same sub domain every year- just adjust the products and dates.

Once you have input the the sub domain for the event, the**FORM LINK** (the entrants will use to register) will adjust to include that subdomain when you save.



3. Change the **FORM STATUS** to **ACTIVE**.

4. Input an **ACTIVATION START** and **END DATE** for the form (e.g when you want the form to go live and finish).

The **FORM LINK** will automatically create when you save the form.

To see an example of how the subdomain link looks on the landing page of a form please click here.

Related Articles

How do I create an event entry event with sub events?

Last Modified on 19/11/2021 10:27 am AEDT

This article outlines how to set up an event entry event that has sub events. This type of event is used for athletic or marathon type events. The set up is pretty similar to a normal event set up, just with a few extra fields.

If you wish to create an event with no sub events, please click here.

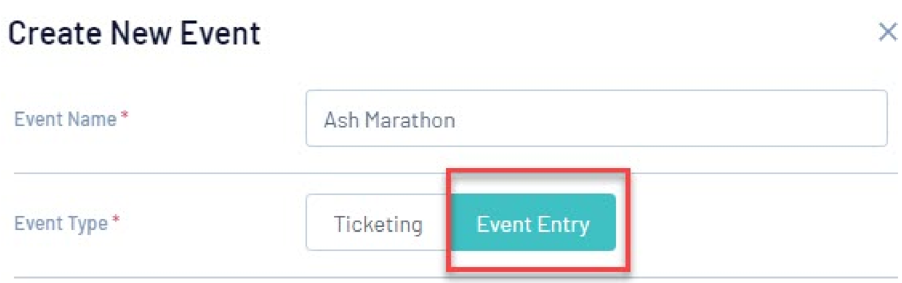
In the following example we are going to be creating a marathon event that has a 5km and 10km run that entrants can register into.

1. Click the drop down arrow against **EVENTS > MANAGE EVENTS.**

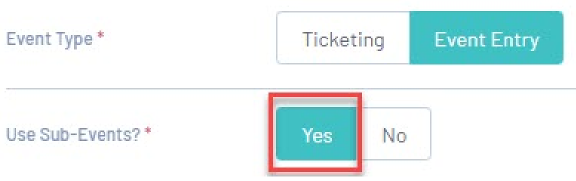
2. Under the **EVENTS** tab click **CREATE NEW EVENT**.

3. Input the event name.

4. Select the **EVENT ENTRY** event type.



5. Select **YES** against use sub events.



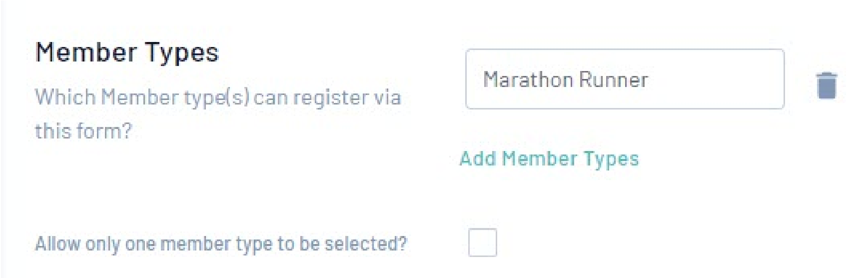
6. Select a timezone for the event and a start and end date/time > click **SAVE**.

The event wizard will open up for you to continue through.

7. Fill out the event details.

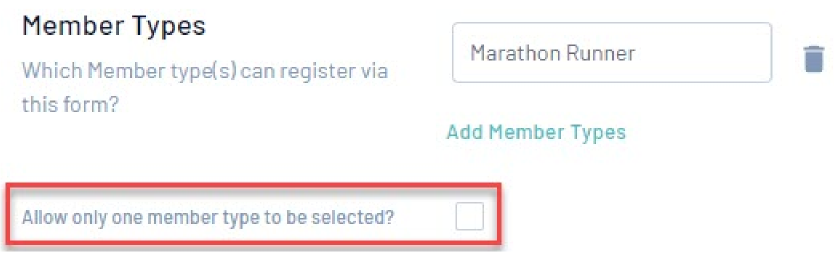
7a. In regards to member types you can either use the default member type enabled for all organisations or you can create your own member types for the event.

In this example we have created a generic marathon runner event member type that everyone will select as this will be related to products that are available for everyone in the parent event. Sub event entrants will then be determined via the product they purchase. Admins can also create specific member types for each sub event rather than the one specific one if they prefer.



7b. Select whether or not you only want entrants to select one member type or your are fine with more than one. If you only want entrants to register to one sub event then make sure this box is ticked, however if you are okay with entrants registering to more than one sub event then leave this box unticked.

In this example the box is unticked as there is only one member type anyway but you can tick this if you have more than one.



8. Fill in all other event details > click**SAVE**.

Move onto Step 2: Event Products & Groups.

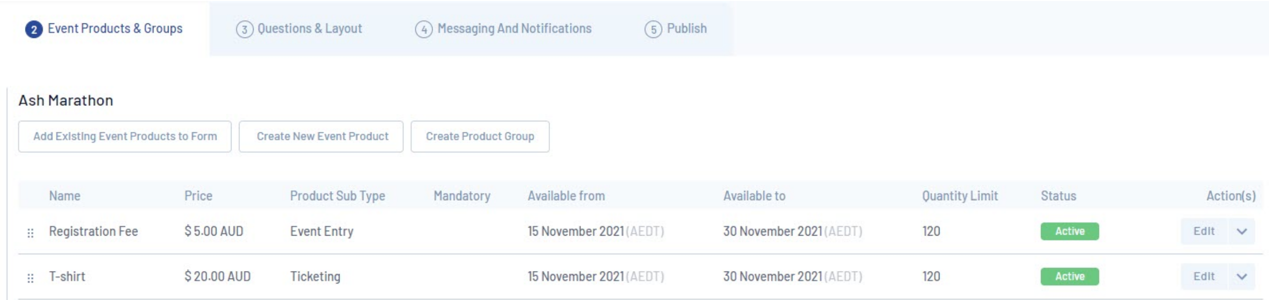
The parent event (which is the marthon event itself) needs to have at least one product added, so this is where you would charge a participation fee, marchandise products etc related to the event that's available for everyone. This also where you will set up the sub events and the products needed for those sub event.

10. Create or add existing event products that is<u>available for all entrants</u> when registering.

In this case we are charging a registration fee (mandatory) and an option to purchase a t-shirt.

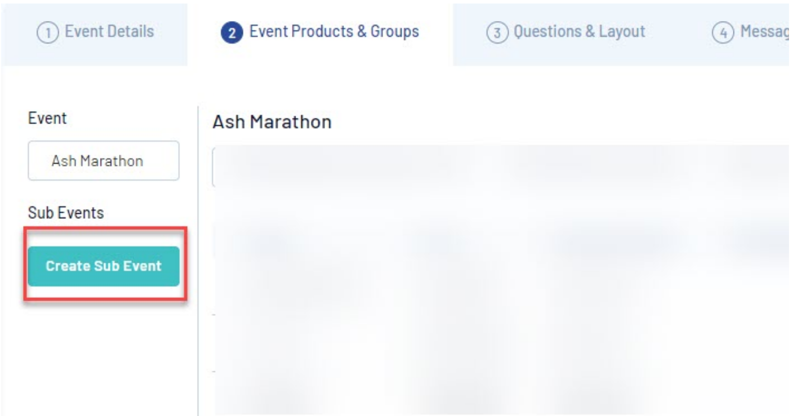
- If you are not charging a fee etc for the event itself, you will need to add one regardless, just put a $0 price to the product.
- Here you can choose to add an event entry type product or a ticketing type product.

- We recommend creating a generic event member type or using the default member type available when creating these products, as these products will be available for everyone rather than a specific type of runner (if using more than one member type).



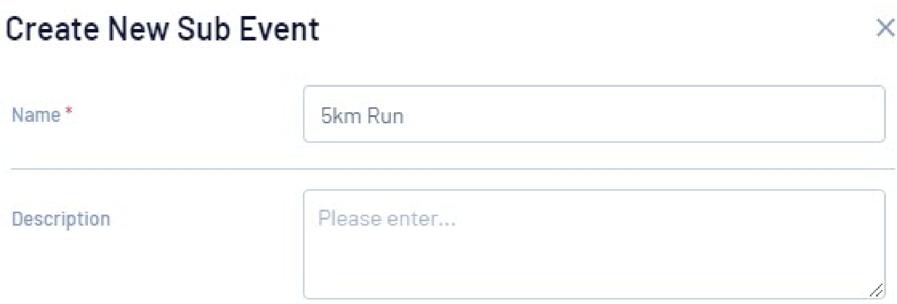
Now you can create the sub events and add the relevant products for these events.

11. On the right hand side of the event product page, click**CREATE SUB EVENT**.



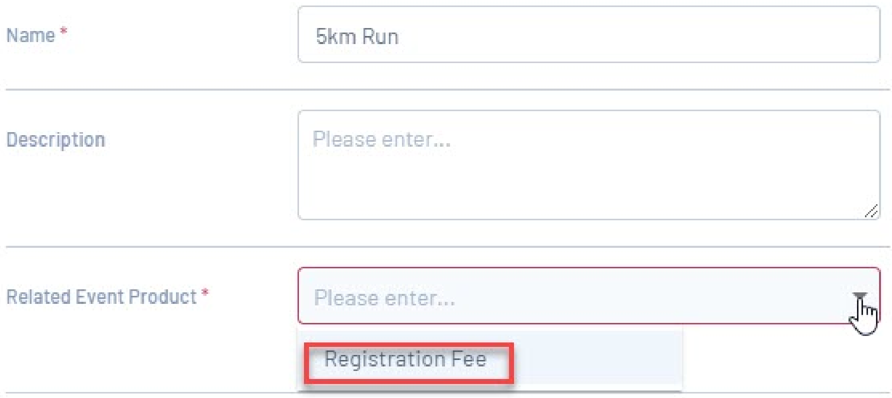
12. Input the name of the first sub event and add a description (optional).

In this example it will be the 5km Run.



13. Select the generic/mandatory product that will appear for that entrant registering to this sub event.

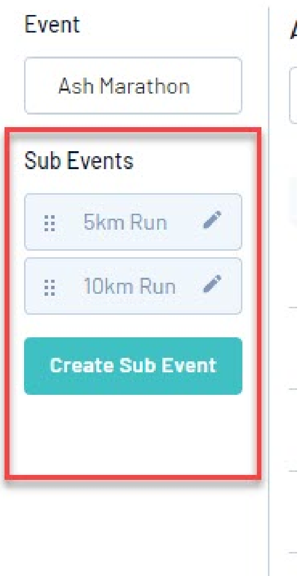
In this example it will be the registration as that is mandatory.



14. Click **SAVE**.

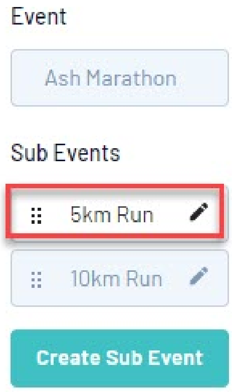
15. Repeat steps 11-14 for any other sub events needed.

Once all sub events have been added your event will appear similar to the below.

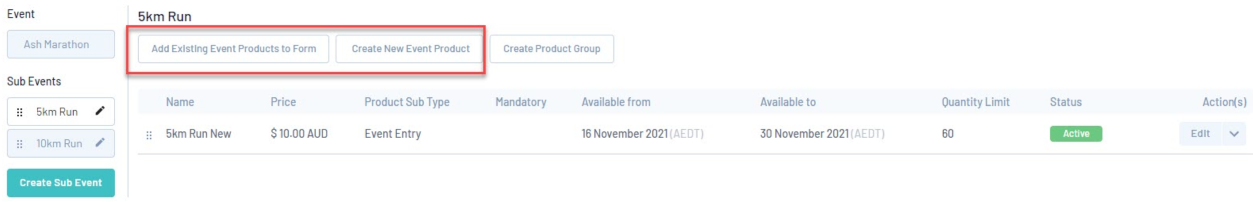


Now you can add the relevant sub event products to these events. These can be created within the event itself or pre-created and then added.

16. Click into the first sub event.



17. Create a new event product for this sub event or add an existing one that you created previously > click **SAVE**.



18. Repeat for all other sub events.

19. Move onto Step 3: Questions & Layout.

20. Move onto Step 4: Messaging & Notifications.

20a. Under the **MESSAGING** tab Input any messaging you would like for when the entrant registers (this is based on the parrent event, not each sub event so make this generic).

20b. Under the **TICKET & INVOICE** tab, you also have the option on whether or not you would like to generate an event ticket and event entry pass for the participant based on their registration- this is automatically defaulted to YES, so untick this box if you wish to not have one generated for entrants. More information on event tickets can be found here (insert link).

21. Move onto Step 5: Publish.

Input the relevant sub domain and form status for this event as per a normal event set up.

Related Articles

Subdomain, Landing Pages and Event Registration Form Display

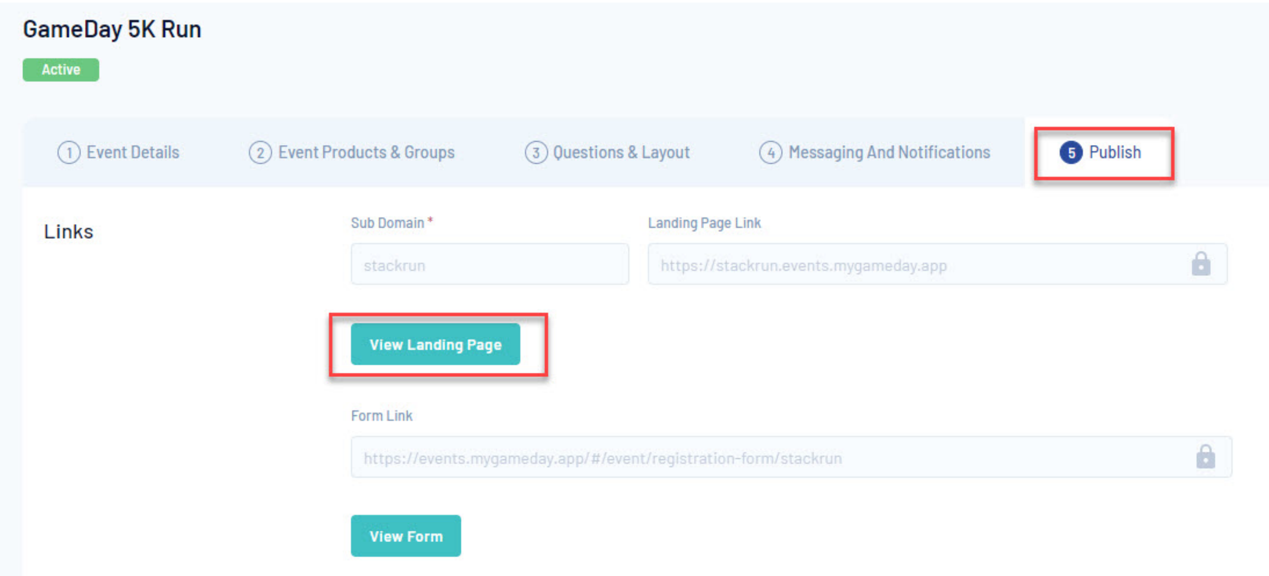
Last Modified on 28/04/2021 9:34 am AEST

After you have input a sub domain link within the event registration form in Step 5: Publish, below is an example of where you can see where this sub domain displays, the landing page for the event (where entrants can access the event form and see information related to the event) and how the even registration form appears when it is taking online registrations and when it is currently offline.

LANDING PAGE:

To view the landing page:

Within the event you created click on**PUBLISH** > then click the **VIEW LANDING PAGE** button.



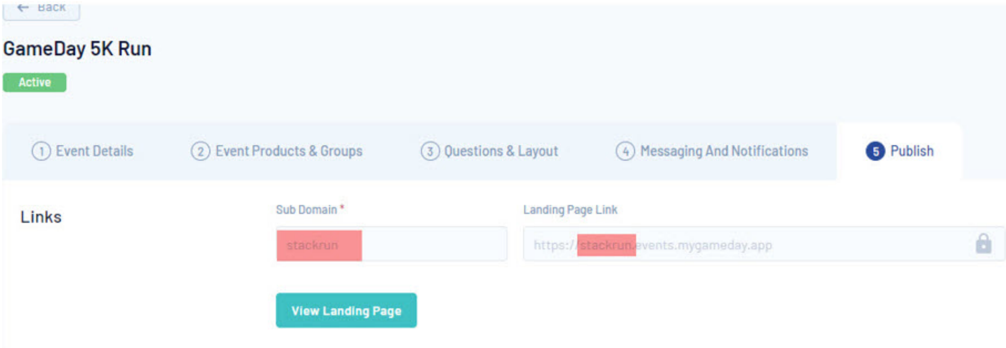
The landing page can be viewed at any point by members regardless of whether the event form itself is taking registrations or not.

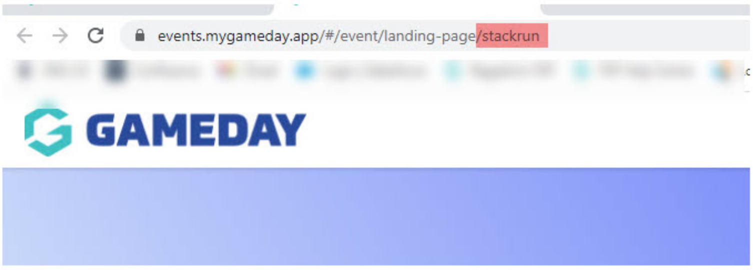
SUB DOMAIN

The subdomain that you created for the event displays like the following when viewing the event landing page or the event registration form.

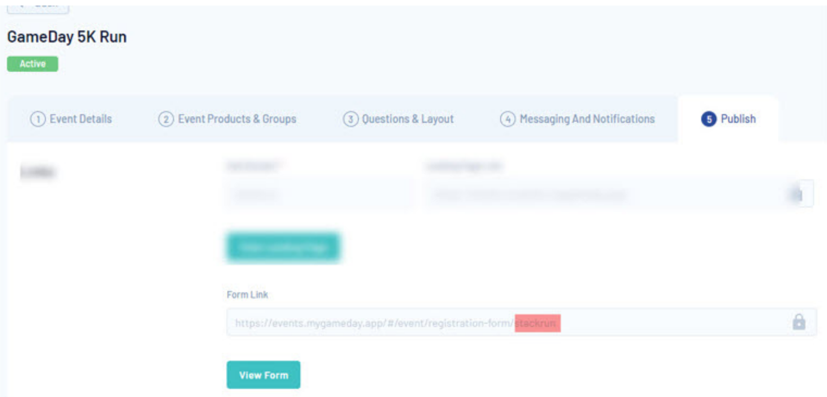
You can send this URL out to enrants who can view this landing page that shows dates, sponsors, products, venue etc.

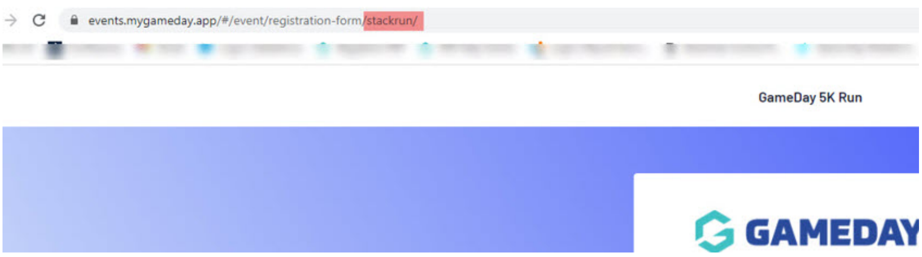
LANDING PAGE:





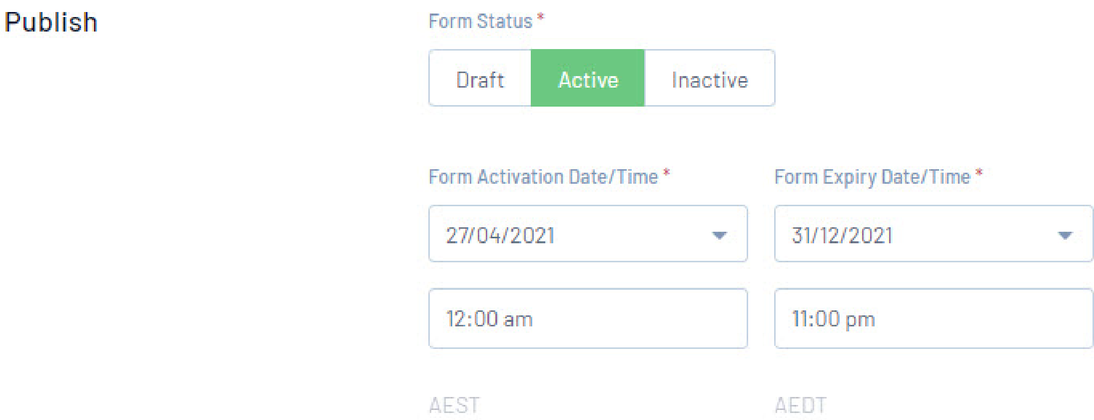
EVENT REGISTRATION FORM:



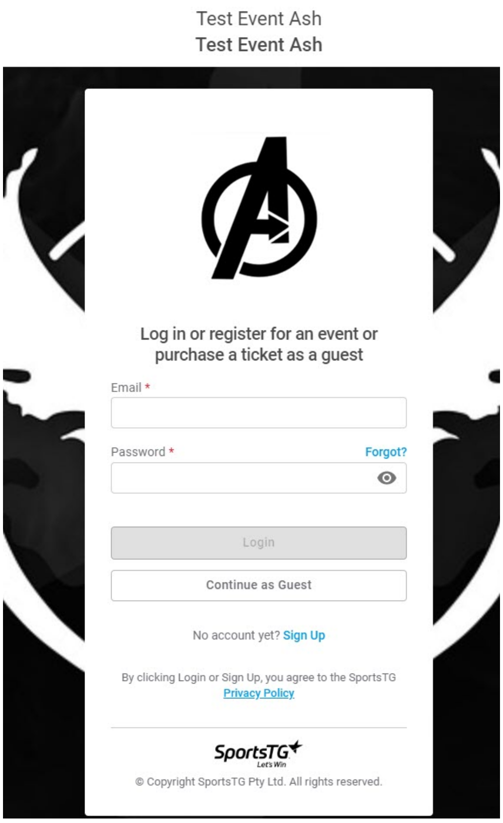


EVENT REGISTRATION FORM STATUS:

The following displays are based on what dates you have set as the**FORM ACTIVATION** and **FORM EXPIRY DATE** within the event itself.

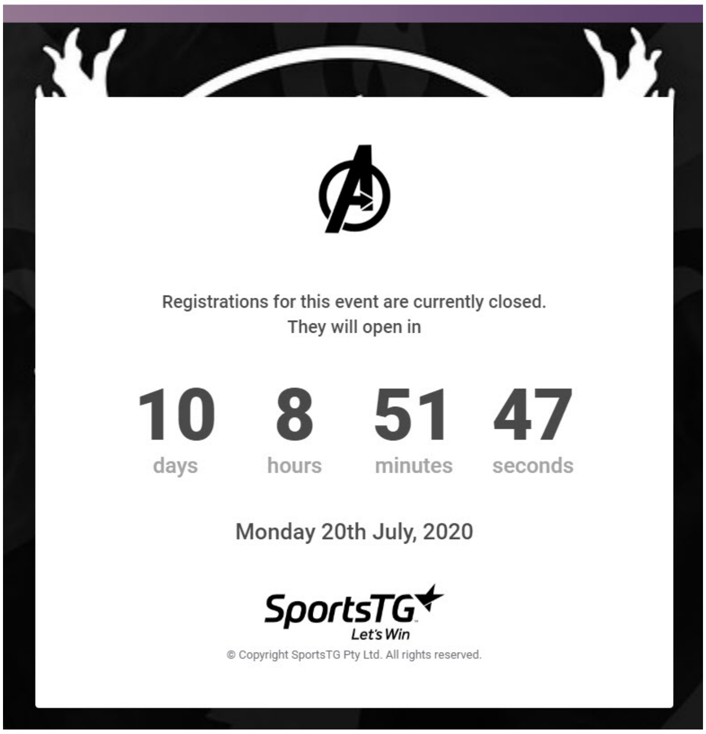


If an event is **currently taking online registrations**, the event registration form will appear like the below, where they are able to register.



If an event is **not currently taking online registrations**, the event registration form will appear like the below where they are not able to register at all. It will show a countdown timer to when registrations are available.

Ash Future Event
Ash Future Event



Related Articles

How do I view and edit a shared form?

Last Modified on 22/04/2021 9:03 am AEST

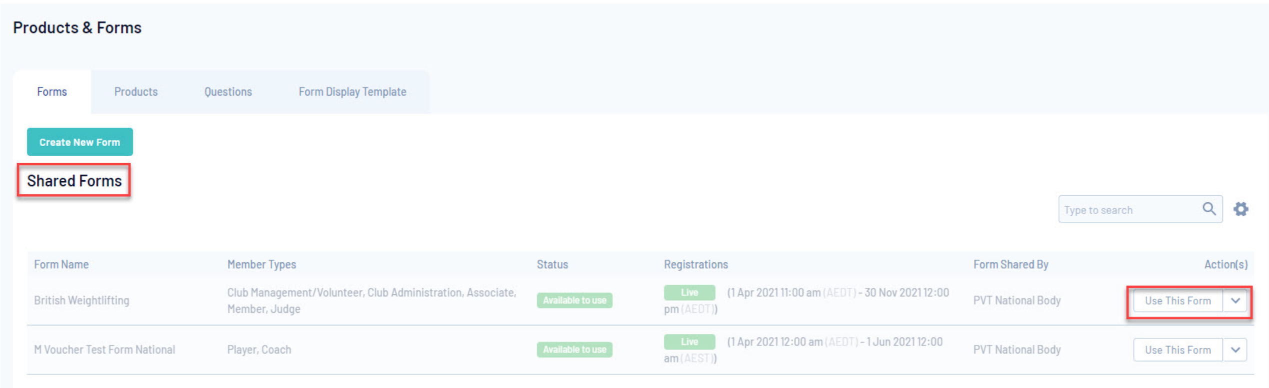
A higher level organisation, like a national or state body may have made their registration form available to your level (club). You have the ability to edit this form, to add your club's own questions, products and messaging.

1. Click on the **Products & Forms**.

2. On the **Forms** tab, you will see that there is a Shared Forms and My Forms option.

- **Shared Forms:** this is a list of all the forms that the higher level organisation has made available for you to use.
- **My Forms:** this is a list of all the forms you have created at your level.

3. Under the **Shared Forms** heading, click **Use This Form** next to form the higher level organisation has made available to you.



4. This will open up the form in edit mode, in which you can then add in your own club questions, fees and messaging.

NOTE: You will not be able to change higher level questions and products already in the form. These will be greyed/blued out.

Related Articles

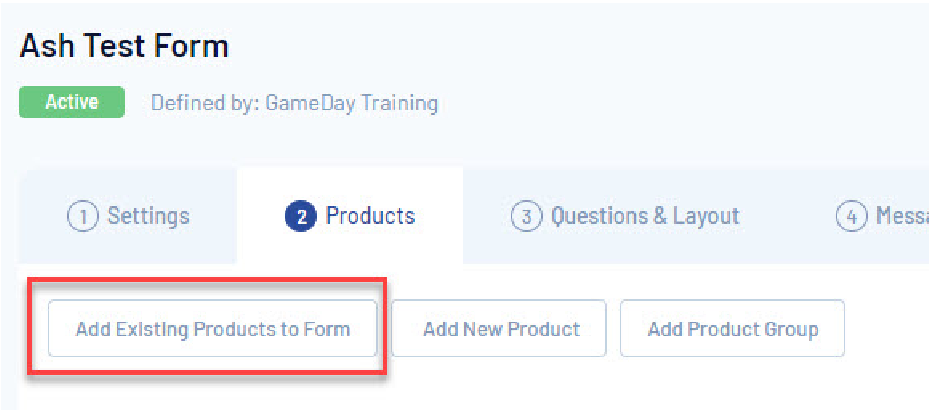
How do I add or remove an existing product to a registration form?

Last Modified on 22/04/2021 9:17 am AEST

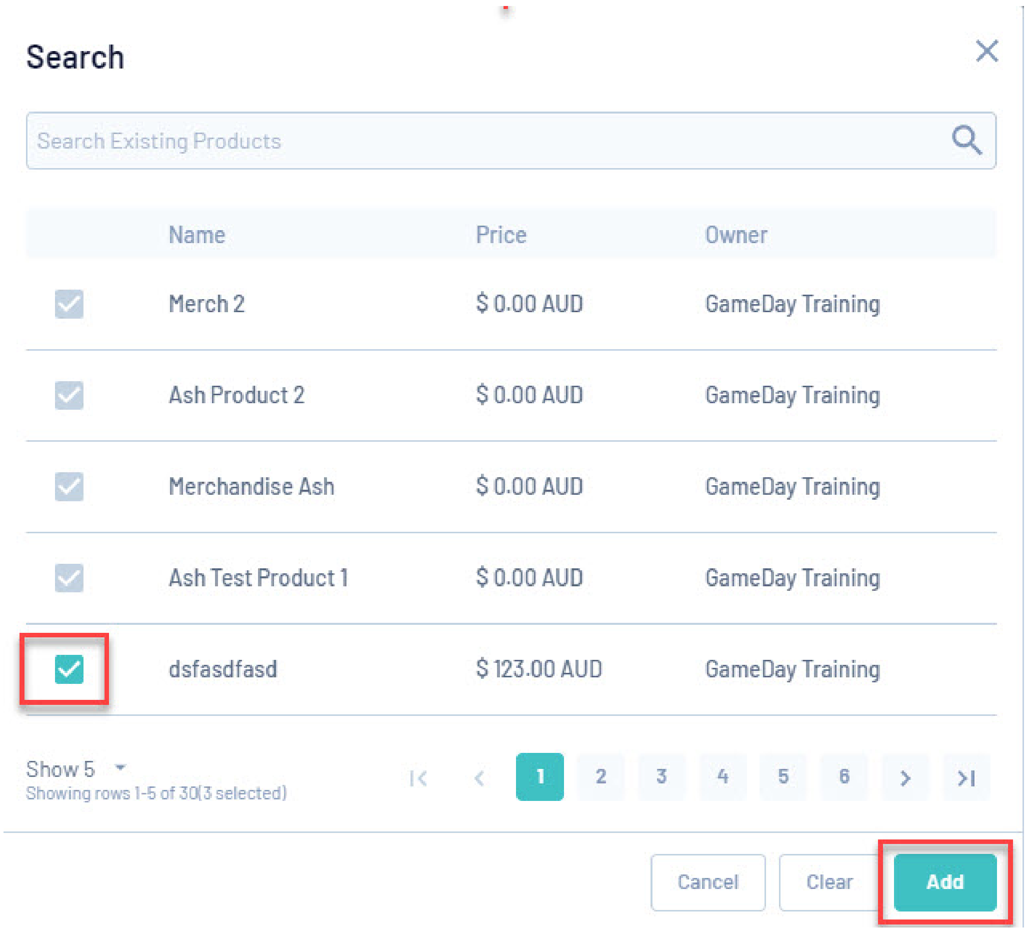
ADDING AN EXISTING PRODUCT

1. Click **edit** next to the registration form name.

2. On the **Products** tab, click **Add Existing Product to Form**.



3. A list of existing products will display. Select the checkbox next to the product you want to add. Products that have already been added to the form will show as a greyed out tick. Once all products have been added, click **add**.

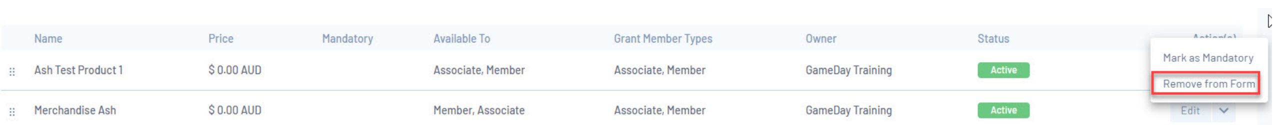


NOTE: If you can't find a product you are looking for, use the**search bar** on the top.

NOTE: only those products created at your level can be added via the form. If you need a higher level product added to your form, please speak to your higher level body as you will require a shared form to be able to do this.

REMOVE AN EXISTING PRODUCT

1. To remove a product from the form, click the drop down arrow next to the product and click **Remove from From From.**



1a. This product will then highlight red, click **SAVE.**

Related Articles

Can I create new and existing custom questions within form?

Last Modified on 22/04/2021 9:00 am AEST

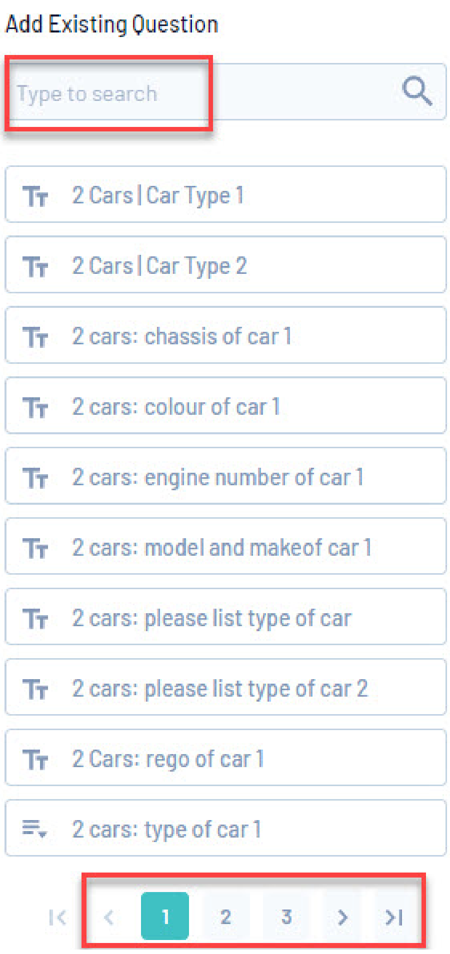
When setting up the registration form, you have the ability to add in new custom questions as well as add in existing questions.

NOTE: this section saves automatically once a question/s is added to the form.

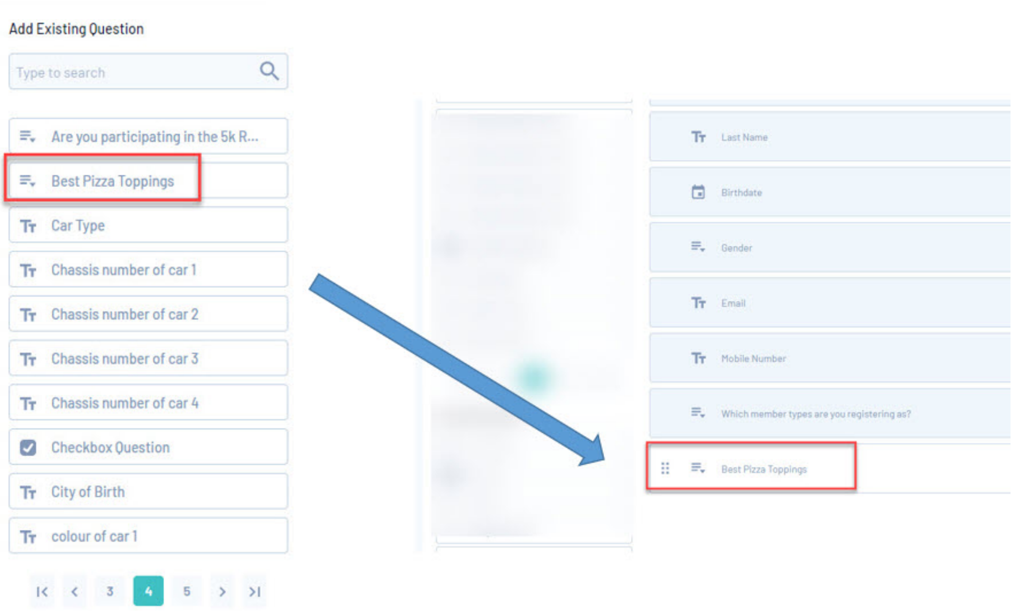
ADD AN EXISTING QUESTION TO THE FORM

1. Edit the registration form.

2. On the **Questions and Layout** tab, use the **search bar** or view click on the **page numbers** to find the relevant existing questions.



3. Once you have found the question, click on the **question name** to add it to the form.



CREATE NEW QUESTION AND ADD IT TO THE FORM

1. Edit the registration form.

2. On the **Questions and Layout** tab, select one of the types you would like your question to be.

- **Text field:** where a member will input some sort of sentence or words related to the question.
- **Number:** this is a question that requires a specific number to be input.
- **Picklist:** this is a question where they need to select from a drop down list of different options.
- **Multiple Choice:** this is a question where they can select one or more answers.
- **Date:** a question where a specific date needs to be input as an answer.
- **Checkbox:** a question where a person can check the box to confirm/deny a question.
- **Terms or Privacy Policy:** a question where users are required to read Terms and Conditions or a Privacy Policy for the organisation.
- **Document upload:** enables a user to upload a document or image.

You also have the ability to add a custom **Header Text and Paragraph Block** which allows you to put a heading and information on your form if a question on your forms needs a little more information or you just want to make a note that people can read while going through the form.

3. Input the question name, question text, whether or not the question is mandatory and any other relevant information, then click **Save**.

- For those questions that are of the picklist and multiple choice type, you can edit the answers to these once you have create the question itself. Please see the adding answers article on how to edit these.

4. Question has now been added to the form.

5. Repeat steps 2 and 3 to add more questions to the form.

NOTE: both existing and new questions after being added to the form are automatically saved, so you can then continue through the form. You will be asked to save any changes if you edit any of the questions now on the form.

Related Articles

GAMEDAY

How do I get the registration form link?

Last Modified on 23/04/2021 9:15 am AEST

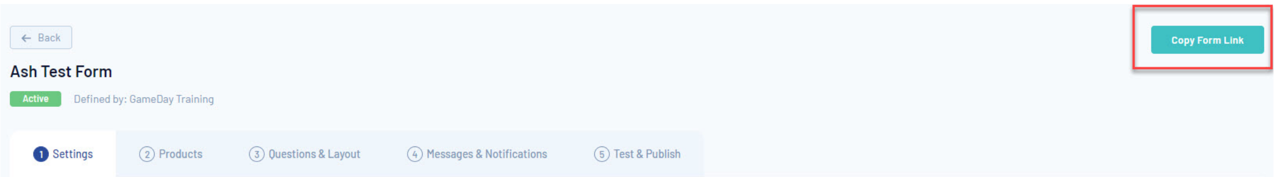
The registration form URL is the website link that members can use to register to the club.

NOTE: a registration form link will only appear when the form is set to active and is not expired.

GET THE REGISTRATION FORM LINK FROM WITHIN THE FORM

1. Edit the registration form.

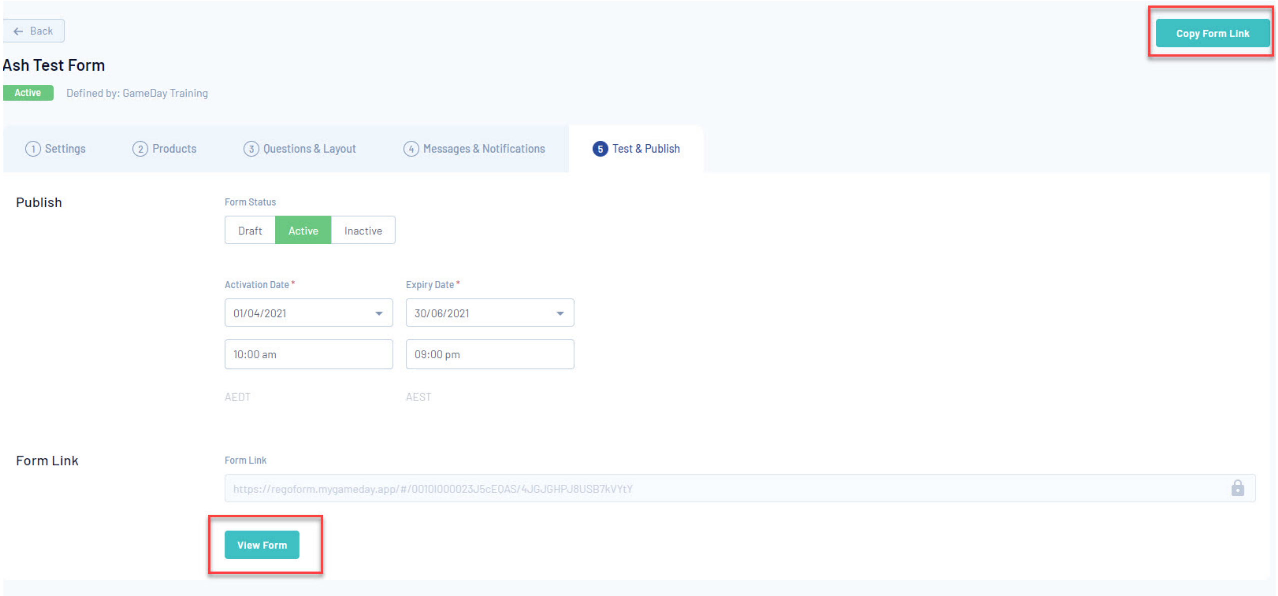
2. Click the **Copy Form Link.**



3. Paste into a web browser or within a page or widget on your website/social media.

Alternatively you can go to the **Test & Publish** tab within the form.

From here you can click **Copy Form Link** or and click **VIEW FORM**, which will take you straight to the registration form. From here you can also copy the form URL and post it to wherever you need to.



NOTE: this Copy Form Link is visible within all of the tabs within the form, so you can copy the URL any point in time.

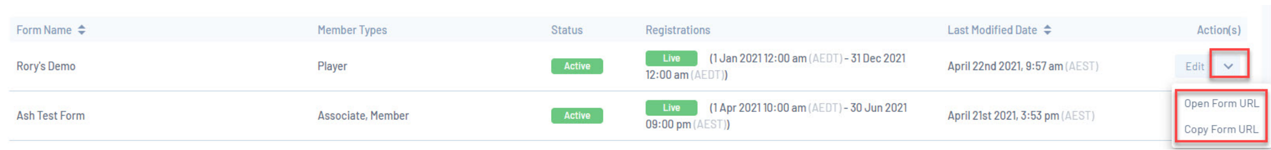
GET THE REGISTRATION FORM LINK FROM THE FORM LISTING PAGE

1. Go to **Products and Forms.**

2. Under the Forms tab, click the**drop down arrow** against the form name.

3. Click **Copy Form Link.**

Or click **Open Form URL** to view the form in a new tab and copy it from there.



4. Paste into a web browser or within a page or widget on your website/social media.

Related Articles

Successful Registration Email Message

Last Modified on 02/02/2022 11:02 pm AEDT

Admins have the ability to input information relevant to the organisation for members to view after they have successfully registered; this is called a **Registration Success Email.**

Once a member has registered successfully via the form, they will receive this information in an email.

NOTE: this registration success email will be sent to the email address listed on the basic information page when filling out the registration form so please make sure members use the same email address as the one on their account so they receive the Payment Receipt as well as this email - if they have two different emails listed, one will get sent to one email and one will get sent to the other.

1. Go to **Products & Forms**.

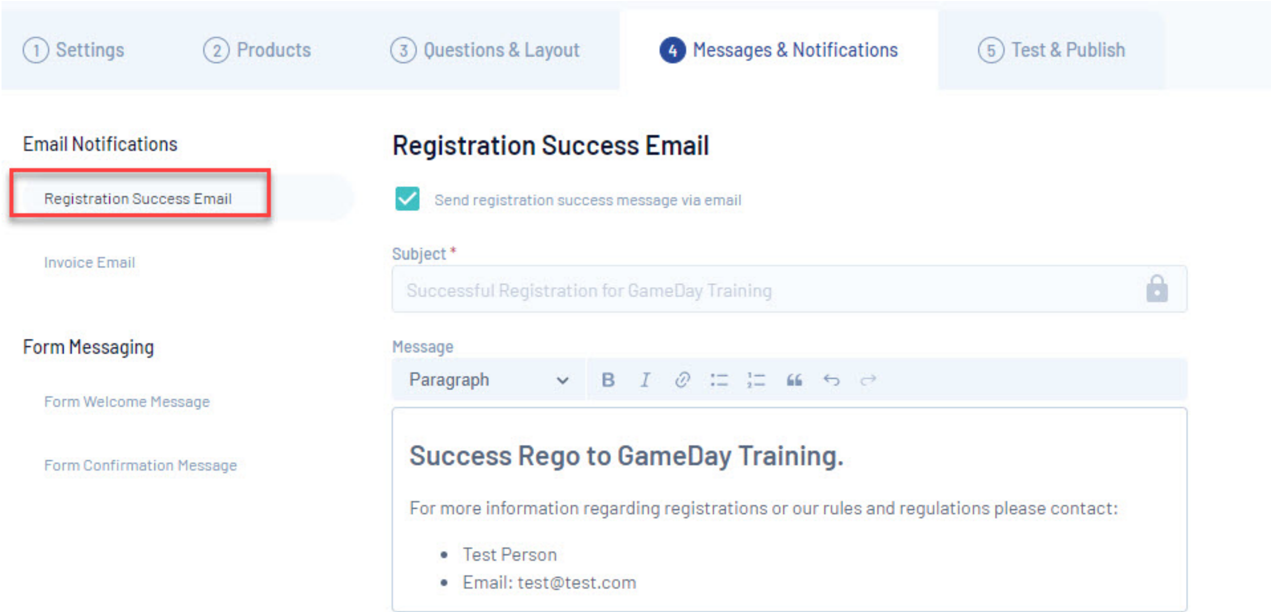
2. **Edit** the relevant registration form.

3. Go to the **Messaging & Notifications** tab.

4. Within the **Registration Success Email**, input the information that you would like members to receive once they have registered.

You can include information about who is the primary contact at the organisation, season start and end dates or any other generic information you would like members to be made aware of once registered.

You have the ability to choose if you want this email to send to member upon successful completion of the registration form. Tick this checkbox if you want this email to be sent to members.



5. Once happy click **save**.

NOTE: the Payment Receipt uses a standard template, however the organisation details will be reflected based on your organisation when a member successfully registers. This Order Confirmation email containing the Payment Receipt will be sent to the email address of the login account holder. If a member record has a different email, the registration success email will be received by the member, but the login account holder email will receive both the registration success email and the order confirmation email containing the payment receipt

Related Articles

Form welcome and confirmation messaging

Last Modified on 10/12/2021 9:57 am AEDT

Admins now have the ability to create messages to appear before a member registers and after a member registers.

Form welcome messaging can be used to welcome the member to the form, provide information they need to know before registering or just general information. Form confirmation messaging can be used to provide information to a member after they have completed their registration, it can be a thanks for registering or the next steps needed from a member after registering or just general information.

Admins can choose to have one set of messaging appear on the form, or both. These section can be added to a membership form as well as an events form.

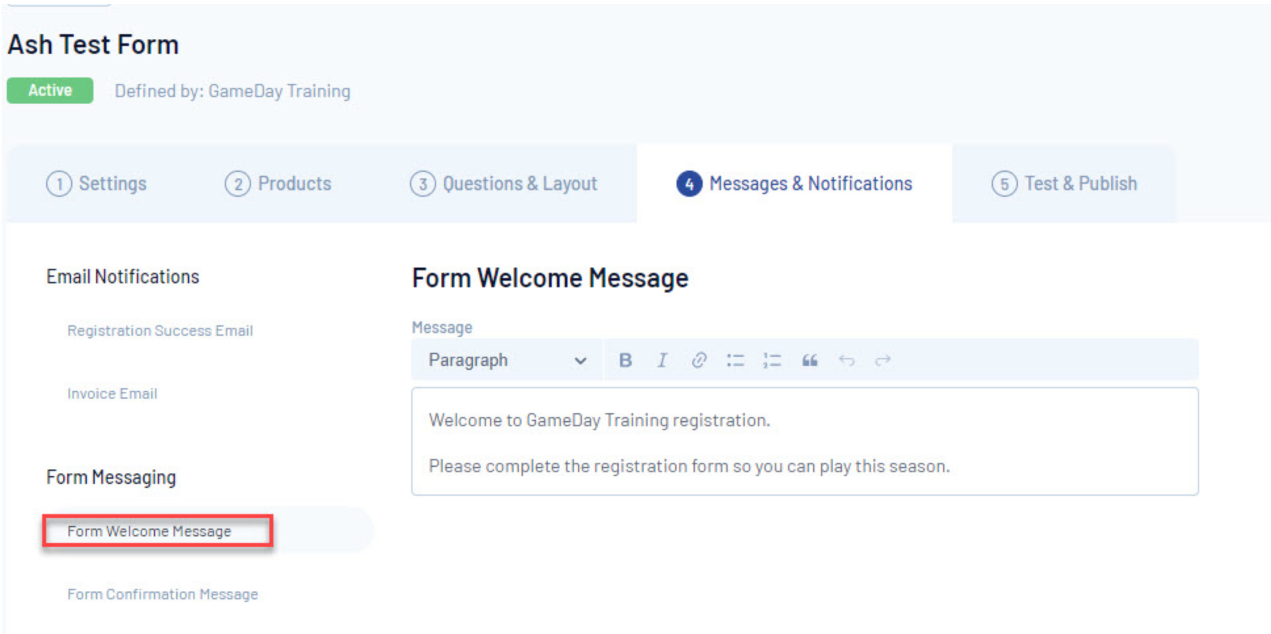
To add in form messaging please see the steps below:

1. Go to **PRODUCTS AND FORMS** > **FORMS**.

2. **EDIT** the relevant registration form.

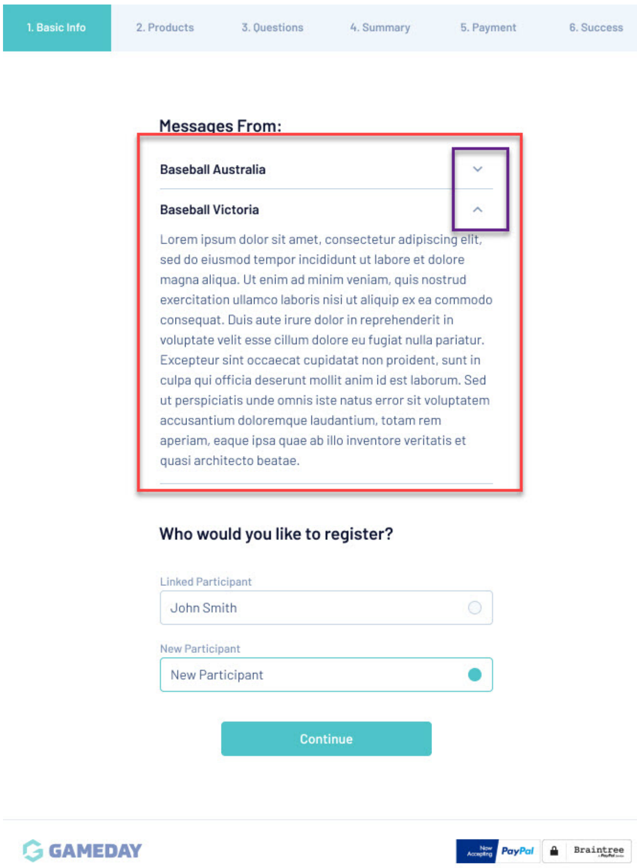
3. Go to the **MESSAGES AND NOTIFICATIONS** tab.

To add a welcome message, select the **FORM WELCOME MESSAGE** section and input your information.

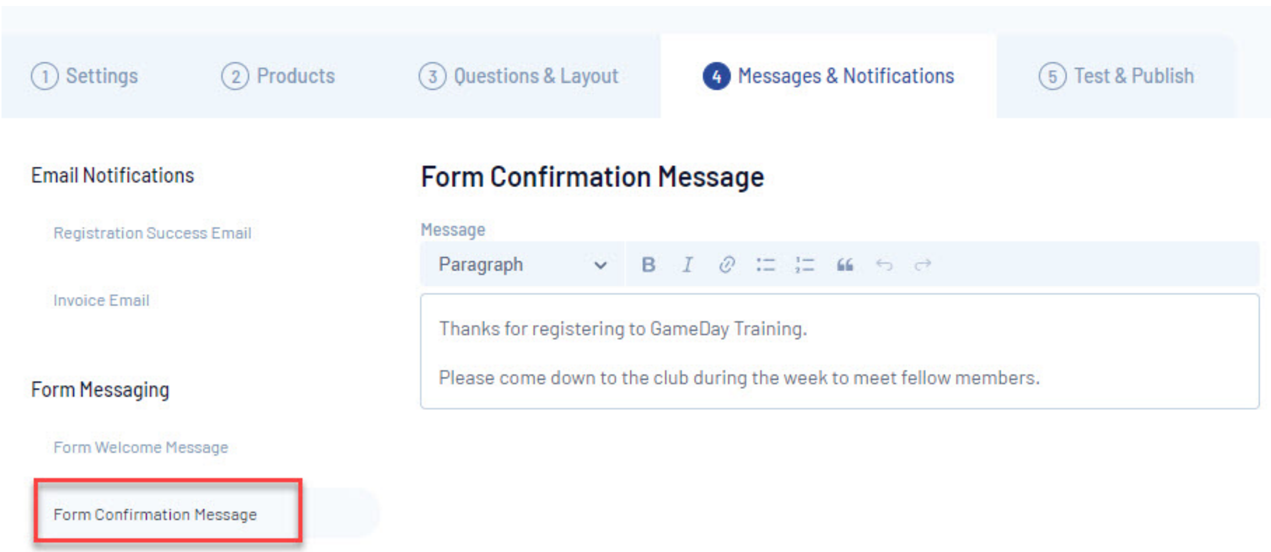


This section appears on the form, after the member logs into the form and before they select a new/existing member. These messages are expanded by default however you have the ability to collapse these messages when progressing through the form.

If the form has been shared down to your organsiation or is being shared down to lower level organisations, and other organisations also have messages set to show as well, members have the ability to collapse or expand these as needed.

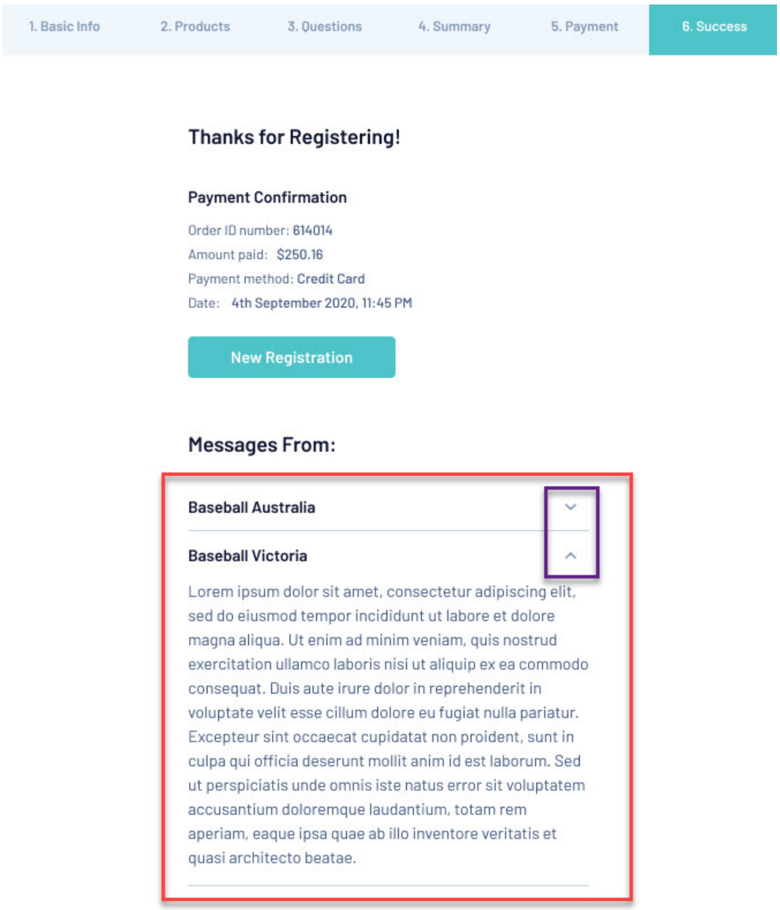


To add a confirmation message, select the**FORM CONFIRMATION MESSAGE** section and input your information.



This section appears on the form, after the member completes their registration. These messages are expanded by default however you have the ability to collapse these messages when progressing through the form.

If the form has been shared down to your organsiation or is being shared down to lower level organisations, and other organisations also have messages set to show as well, members have the ability to collapse or expand these as needed.



Related Articles

GAMEDAY

Full Membership Form Data Export to CSV

Last Modified on 06/05/2021 5:10 pm AEST

Admins have the ability to export all data collected via a registration form whether this is a Membership or Event form.

From this export (into an excel/csv) you can determine which members/participants have completed that form, the questions they filled out and related order information.

More information related to this export:

- at least one member/participant needs to have completed an order via the form otherwise it will return no data
- form data will only be returned for an organisation running this report if data has been collected via the form link generated by that organisation
- each form has to be exported separately - multiple forms cannot be exported in bulk
- TRUE means a checkbox has been selected and FALSE means a checkbox remained unselected
- committed refers to *Unpaid* orders
- for document upload questions, if a document has been uploaded the column will display *YES*, if not uploaded it will display *NO*
- previously deleted questions and products will still be exported

form_nan	first_nam	last_name	dob	email	mobile	user_fille	Associate	Family - C	Family - P	Family - S	Player	Open Reg	Expiry	Reg Expiry	Registrati	Which Ch	order_id	order_dat	order_sta	orderer_e	order_amount
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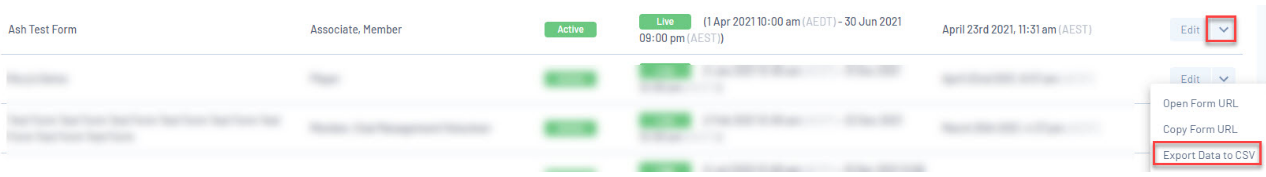
HOW TO EXPORT DATA FOR MEMBERSHIP FORMS

1. Log into your organisation

2. Go to PRODUCTS & FORMS

3. Click the drop down arrow against the relevant form and click**EXPORT DATA TO CSV**



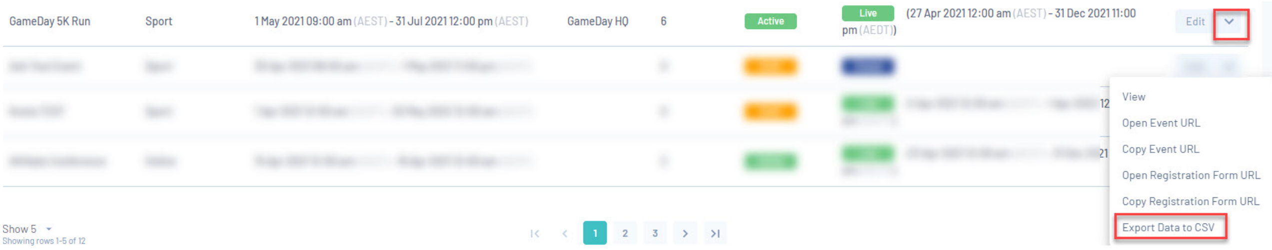
4. Once downloaded this export will appear in your downloads folder on your device with the form name and date as the filename

HOW TO EXPORT DATA FOR EVENT FORMS

1. Log into your organisation

2. Click the drop down arrow against EVENTS and select MANAGE EVENTS

3. Click the drop down arrow against the registration form and click**EXPORT DATA TO CSV**



4. Once downloaded this export will appear in your downloads folder on your device with the form name and date as the filename

Related Articles

How do I set age ranges for my product?

Last Modified on 26/04/2021 10:13 am AEST

If you would like your product to only be visible for members of a particular age or age range, you will need to set this within the product itself.

Admins have the ability to set the following when it comes to age ranges:

1. **Only a minimum age** - they need to be at least a certain age before they can purchase this product based on the four options
2. **Only a maximum age** - they can be no older than a certain age before they can purchase this product based on the four options
3. **Both a maximum and minimum age** - they need to be an age between those to ages in order for them to purchase this product based on the four options.

When setting the age groups you have four options in which you can set the date or how old a member has to be to count within that age group:

- **Specific date:** you will set this to the date for members that will be that particular age, based on the their date of birth.
  - *In this example, these dates would be at-least 18 on 01 Jan 2019 and no older than 13 on 01 Jan 2019.*
- **Season start date:** will be the age of the member based on the date that the season starts.
  - *In this example, if our season starts on the 01 Jan 2019, a member would need to be at-least 18 on 01 Jan 2019.*
- **Season end date:** will be the age of the member based on the date the season ends.
  - *In this example, if our season ends on the 31 Dec 2019, a member would need to be no younger than 18 on 31 Dec 2019.*
- **Registration date:** will be the age of the member based on the day they are registering

<u>Example for setting up Age Display Rules for Specific Date</u>:

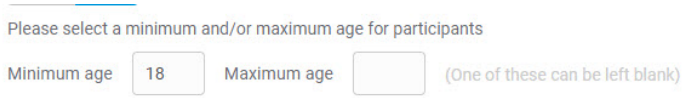
For this example, we will want to set the age group so that this product only shows for members that are seniors as of the season start date, so the age range would 18+.

1. Set the age group display rule to **No**.

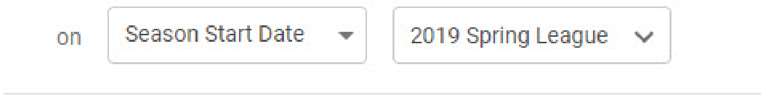
2. Under **Please select a minimum and/or maximum age for participants**, input **18** within the

minimum age box and select **Specific Date**, then select the relevant **date**.

In this example, you would leave the maximum age blank as you are allowing anyone over the age of 18 to register- if you want to limit this to a maximum age of 60 then you can add 60 into the maximum age box.



3. Select one of the four options, in this case it will be**season start date**, and then select the **relevant season**.



This product has now been set up to display for those over the age of 18 based on the start of the 2019 Spring season.

NOTE: once you have set these age display rules it will be best to give this a test run by inputting different dates of births on within the registration form to ensure this filters to the correct age.

Related Articles

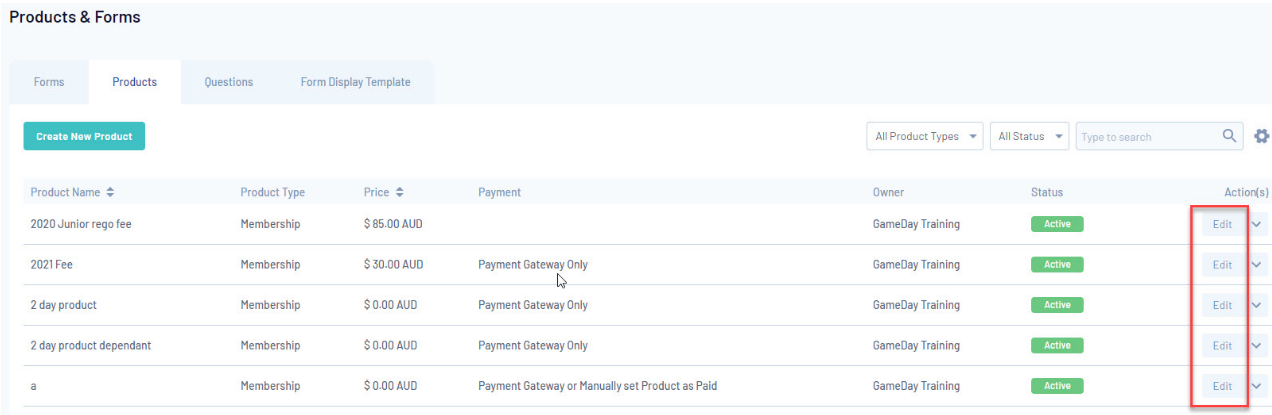
How do I edit a product?

Last Modified on 26/04/2021 11:13 am AEST

1. Go to **Products & Forms.**

2. Go to the **Products** tab.

3. Click **edit** next to the product.



4. Make any relevant changes.

5. Click **save**.

EDIT PRODUCT ON A FORM:

1.Go to Products & Forms

2. Click edit against the relevant form.

3. Go to the products tab.

4. Click edit against the relevant product.

5. Make any relevant changes.

6. Click save.

Related Articles

How do I copy/clone a product?

Last Modified on 26/04/2021 11:15 am AEST

Please see the below on how to clone (copy) a product.

NOTE: products can only be cloned one at a time and cannot be cloned within the registration form itself.

1. Go to **PRODUCTS AND FORMS.**

2. Click on the **PRODUCTS** tab.

3. Search for the product you want to clone.

4. Click the **DROP DOWN** arrow against the product > Click **CLONE PRODUCT**.

5. A message will appear confirming you want to clone this product > click **CLONE.**

This process automatically saves the product as a copy. You now just need to adjust the relevant fields you need to. If the original product was conntected to a particular form, this is the only part of the product that is not cloned.

6. The product name automatically gets called ***Copy Of (product name)***- be sure to change this to the name needed.

7. Adjust any relevant details.

8. Save.

9. Go back to the form listing to find this cloned product or assign it to the relevant form.

Related Articles

How do I create an add-on product?

Last Modified on 13/12/2021 10:59 am AEDT

Admins have the ability to create "add-on products" to add to their forms, both in membership and events. These product types are mainly used for merchandise type products, like shirts, shorts etc. Although these can be created as normal products, these add-on products allow more options like product attributes; e.g colour and size options as well as delivery options, amoung others.

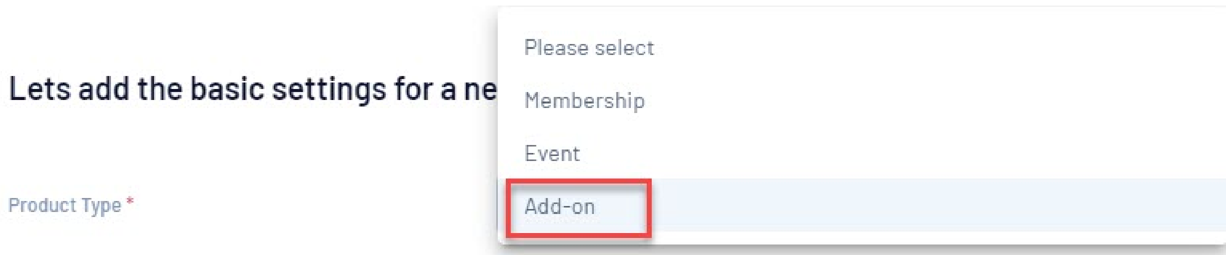
These products are basically created as normal products with some extra field options to select from. Below outlines how you can set up add-on products.

WITHIN THE PRODUCTS & FORMS SECTION

1.Go to **PRODUCTS & FORMS**.

2. Click on the **PRODUCTS** tab > **CREATE NEW PRODUCT**.

3. Against **PRODUCT TYPE** select **ADD ON**.



4. Select the relevant **PRODUCT SUB TYPE**.

- Physical Goods - this is an item that a member will physically receive, like an item of clothing, book etc. The set up for this type of product is a little different so please click here to see how to set this up.
- Non Physical Goods
- Donations

5.Input a product name and product description (if needed).

6. Add a product image (optional).

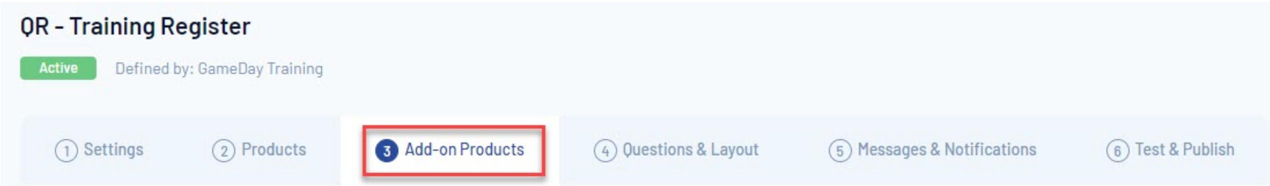
7. Fill in the rest of the product set up as per normal and save.

WITHIN A MEMBERSHIP OR EVENT REGISTRATION FORM

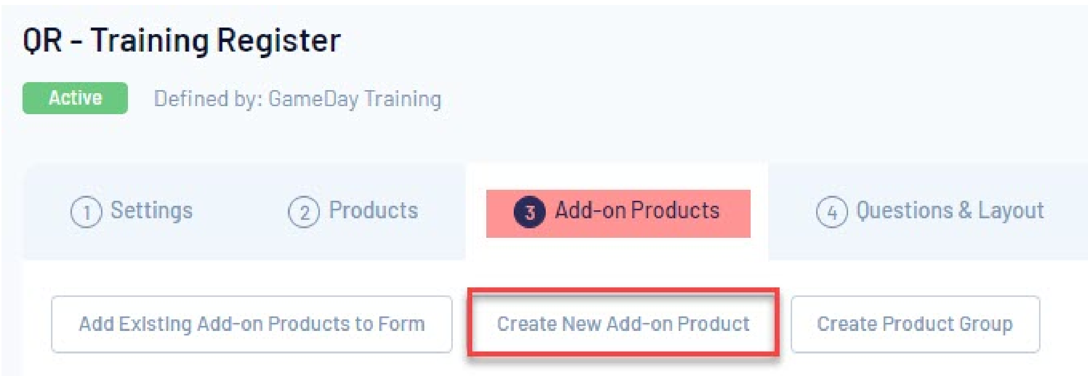
The set up is basically if you were creating a product via a form, however, the forms now display an add-on product tab where these products can be created and added to the form automatically.

1. Click **EDIT** against the relevant membership or event form.

2. Click into the **ADD-ON PRODUCT** tab.



3. Click on **CREATE NEW ADD-ON PRODUCT** button.



4. Select a **PRODUCT SUB TYPE**.

- Physical Goods - this is an item that a member will physically receive, like an item of clothing, book etc. The set up for this type of product is a little different so please click here to see how to set this up.
- Non Physical Goods
- Donations

5.Input a product name and product description (if needed).

6. Add a product image (optional).

7. Fill in the rest of the product set up as per normal and save.

This product is now automatically added to the form as well.

Related Articles

What is a product attribute?

Last Modified on 13/12/2021 10:42 am AEDT

Admins have the ability to add attributes to certain products. A product attribute is used when an organisation wishes to sell a physical good type item, like water bottles, merchandise, clothing, etc and the product needs to have a colour, size etc listed so an organisation can report on this and provide to members as requested.

Admins can set up product attributes via the following:

1. Click on **PRODUCTS & FORMS.**

2. Click on the **PRODUCT ATTRIBUTES** tab.

You may see that there are default attributes listed, *size* and *colour*. These are deafult as these are the main ones that most organisations will use. You can use these or create your own if the some of the sizes or colours in the default ones are not what is available for your organisation.

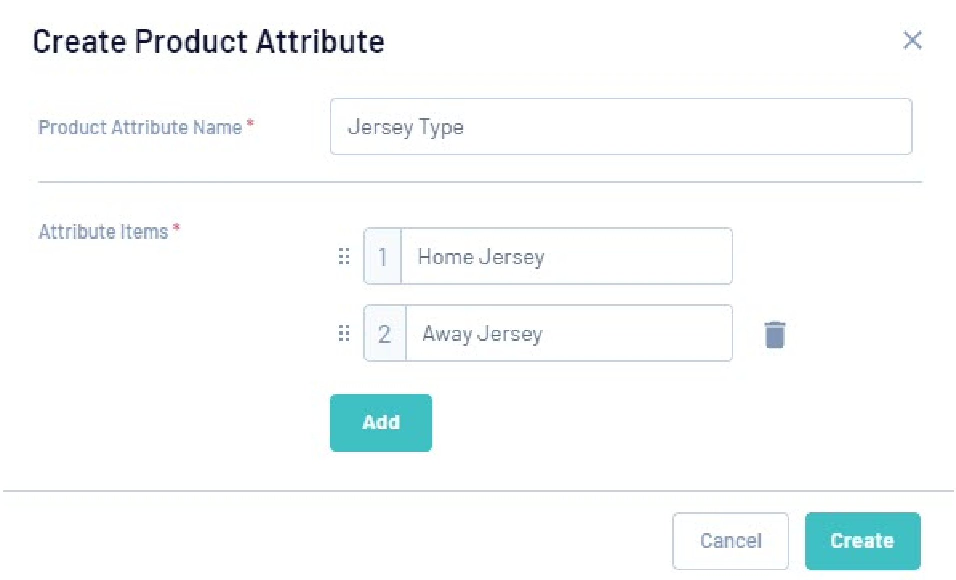
3. Click **CREATE PRODUCT ATTRIBUTE**.

A pop up box will appear to create this attribute.

4. Input the product **attribute name** (e.g size, colour etc)

5. Input the **attribute items** - this is the different options available for that attribute (e.g xl, small, red, blue etc). To delete an item, just click the **trash** icon.

> You need at least one attribute item listed to create it, however there is no maximum number of items you can list here.



6. Click **CREATE**.

This will now appear in the list. Once items have been created, they cannot be deleted.

Product attributes can only be assigned to physical good products, click here to see how to do this.

Related Articles

How do I add a product attribute to a product?

Last Modified on 13/12/2021 10:42 am AEDT

Once you have created the product attribute it can be added when creating an add-on product. These can only be added to **add-on products** that have the **PHYSICAL GOODS** sub type.

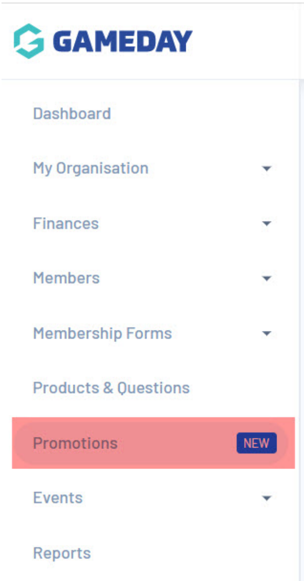
Click here to see where to add these product attributes to an add on product (step 8).

Related Articles

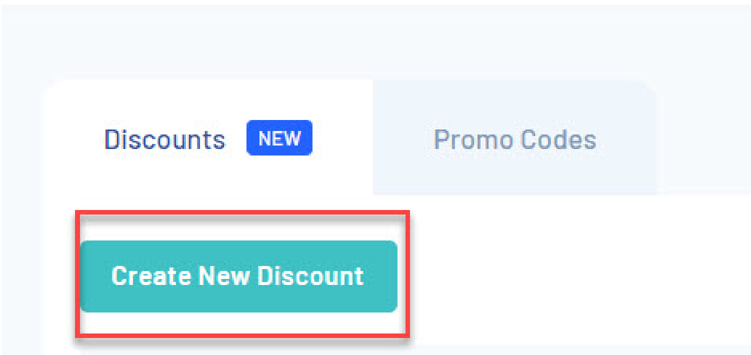
How to create a discount?

Last Modified on 23/05/2022 12:36 pm AEST

1. Click on the **PROMOTIONS** menu on the left hand side menu.



2. Click **CREATE NEW DISCOUNT**.



For an explanation on the types of discounts and discount sub types, pleaseclick here.

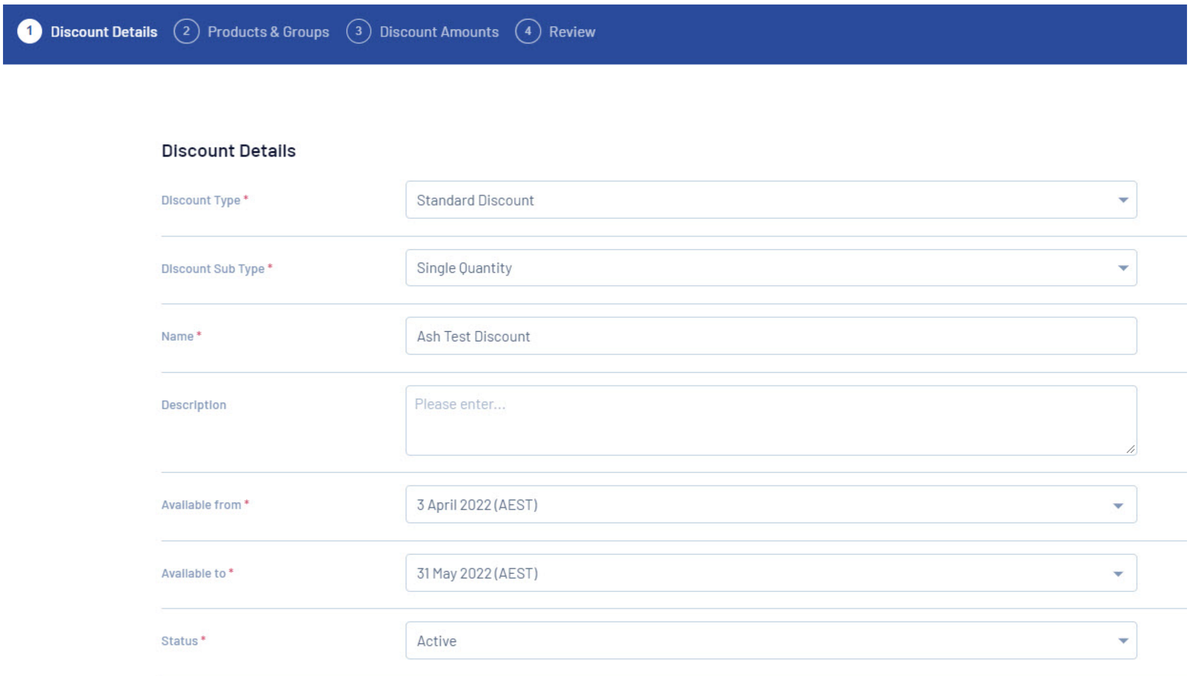
3. Select the type of discount you want to create.

4. Select the sub type for the discount (single or multiple).

5. Input a name for the discount and add a description (optional).

6. Input an available from and to date in relation to how long this discount will be available for.

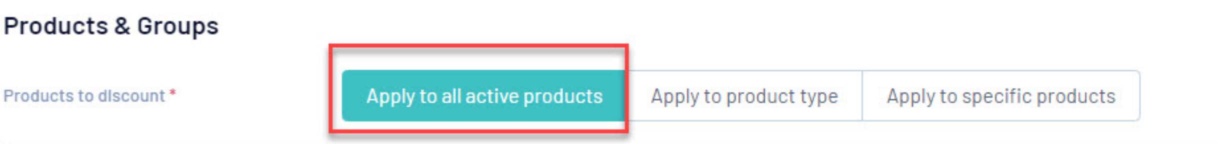
7. Keep as active.



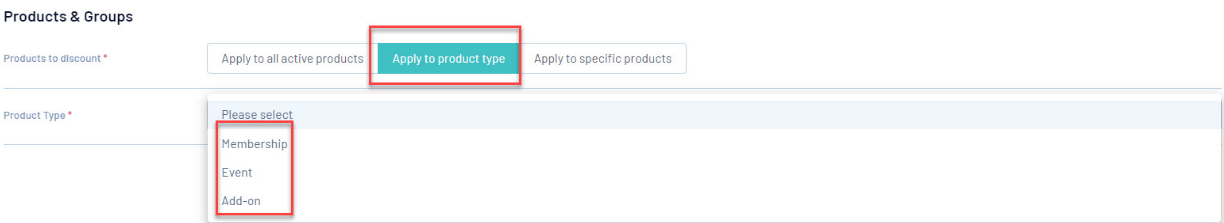
8. Click CONTINUE.

9. Select the relevant product/s that you want this discount to apply to.

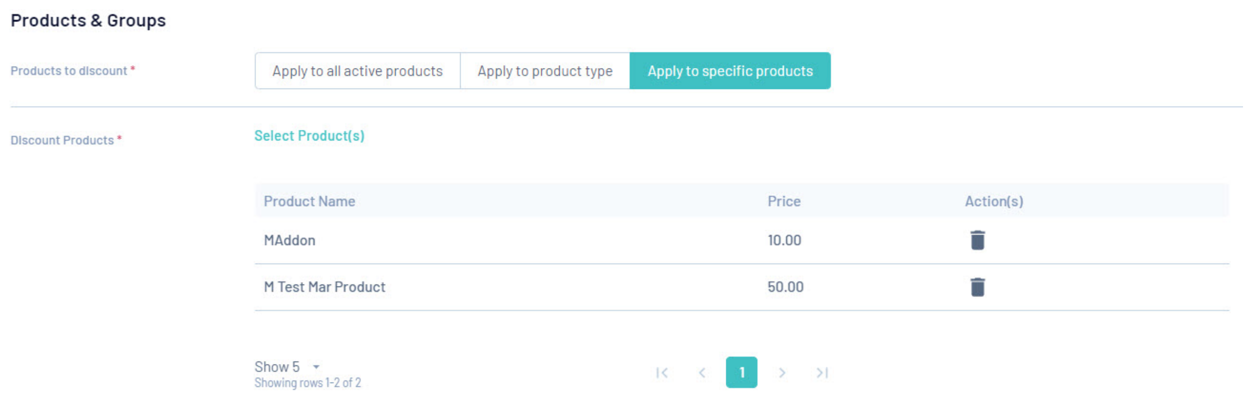
9a. <u>**APPLY TO ALL ACTIVE PRODUCTS:**</u> this option will mean that this discount will apply to every product listed within your product list.



9b. <u>**APPLY TO PRODUCT TYPE:**</u> this option will mean that this discount will apply to ALL products within that specific product type (e.g if membership is selected this discount will apply to ALL membership created products).



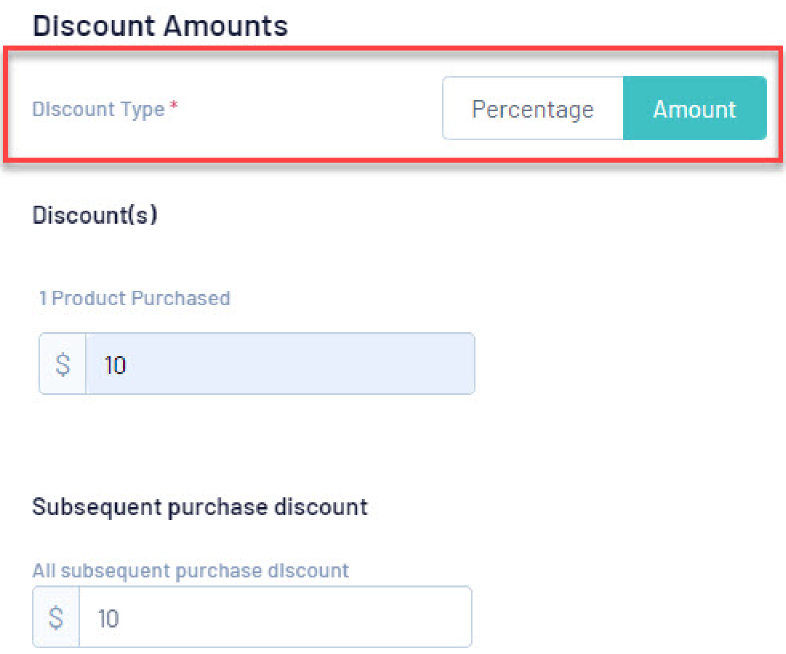
9c. <u>**APPLY TO SPECIFIC PRODUCTS:**</u> this option will mean that this discount will apply specific products that you select that require this discount (e.g the discount applies to a junior volunteer and a senior volunteer fee).



10. Click CONTINUE.

11. Input the relevant discount type. Here you can input a specific amount ($) or percentage (%).

Here you can also add a subsequent discount if a person was to purchase more than one of the option you chose for the discount.



12. Click CONTINUE.

13. Review your information and go back and change if needed.

14. Once happy,. click CONFIRM AND SAVE.

This discount has now been applied to the relevant product/s selected.

HOW DO I TELL IF A PRODUCT HAS A DISCOUNT ATTACHED TO IT?

You can tell if a product has a discount applied to it via a red"SALE" icon listed next to it. Those that don't will not have one listed.

t- shirt	Add-on	Physical Goods	$ 10.00 AUD	Payment Gateway Only	PVT National Body	Active	Edit
MAddon	Add-on	Physical Goods	$ 10.00 AUD SALE	Payment Gateway Only	PVT National Body	Active	Edit
April National Membership Product	Membership	N/A	$ 50.00 AUD SALE	Payment Gateway Only	PVT National Body	Active	Edit
M Test Mar Product	Event	Ticketing	$ 50.00 AUD	Payment Gateway Only	PVT National Body	Active	Edit
MC April Addon	Add-on	Physical Goods	$ 100.00 AUD	Payment Gateway Only	PVT National Body	Active	Edit

Related Articles

How to create a bundle discount?

Last Modified on 23/05/2022 12:24 pm AEST

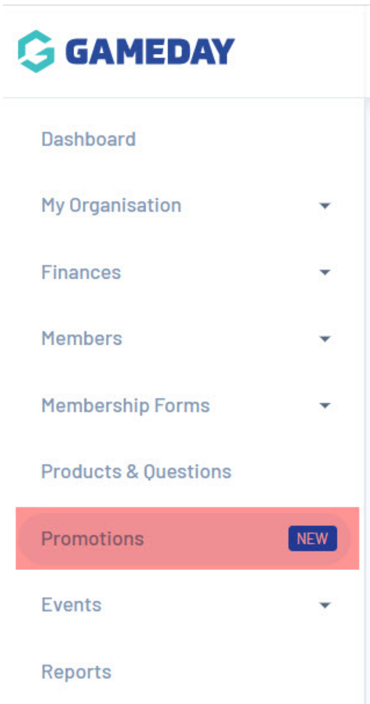
More information on bundle discounts can be found here.

NOTE: the products/product groups wanting to apply for this type of discount must be added to the relevant form/s before you can set this up.

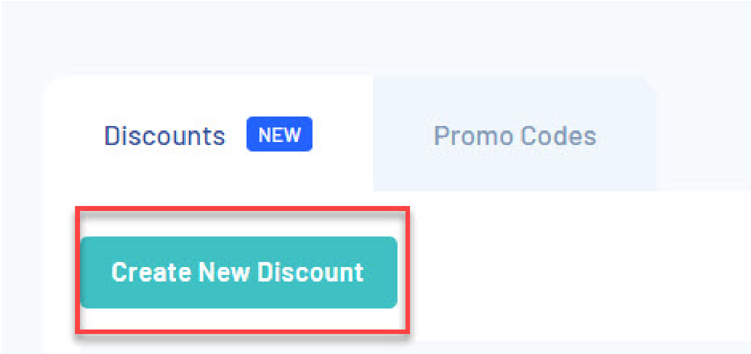
Below outlines how to create a bundle discount:

1. Log into your organsiation.

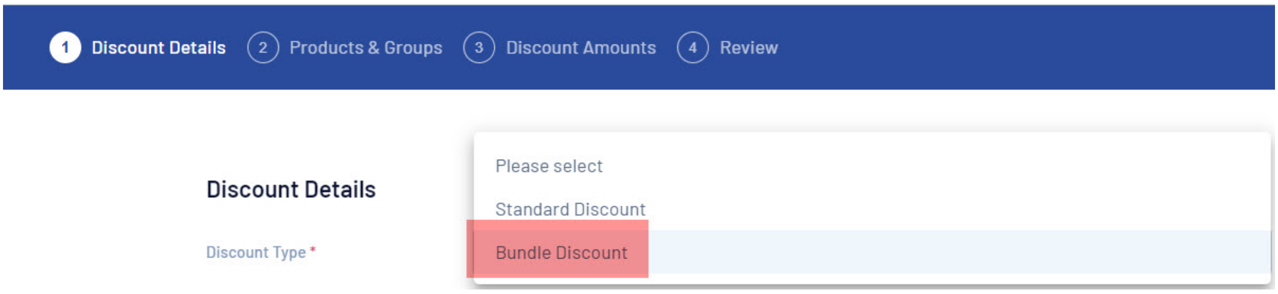
2. Click on **PROMOTIONS** from the left hand side menu.



3. Click on **CREATE NEW DISCOUNT**.

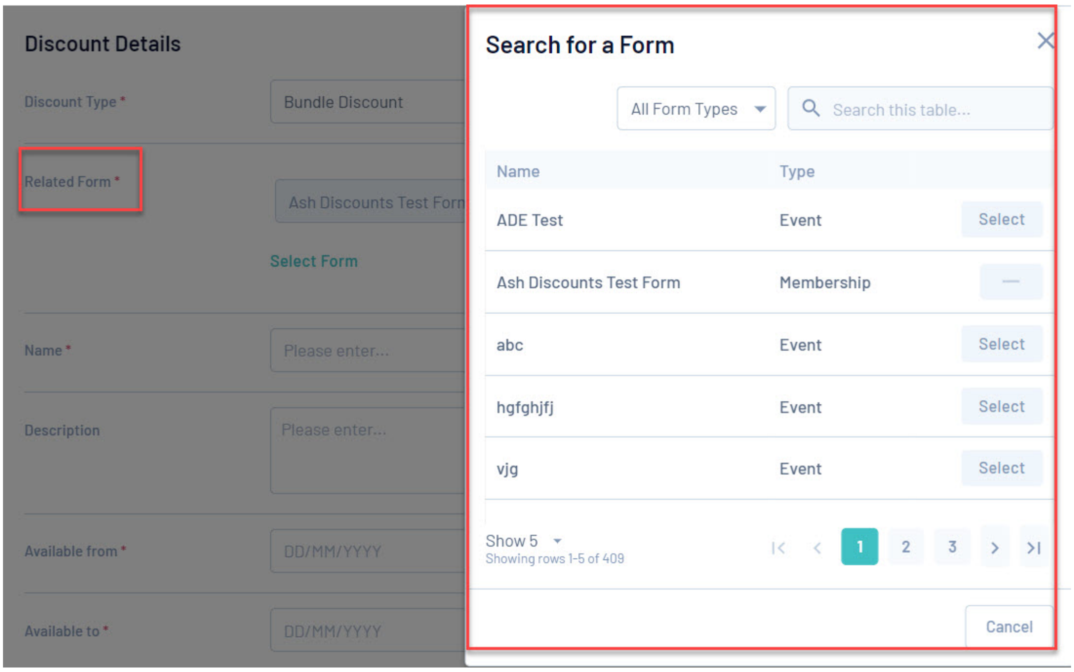


4. Against Discount Type select **BUNDLE DISCOUNT**.



5. Select the relevant **FORM/S** you wish to apply this bundle discount to.

You can choose more than one form here if you wish.



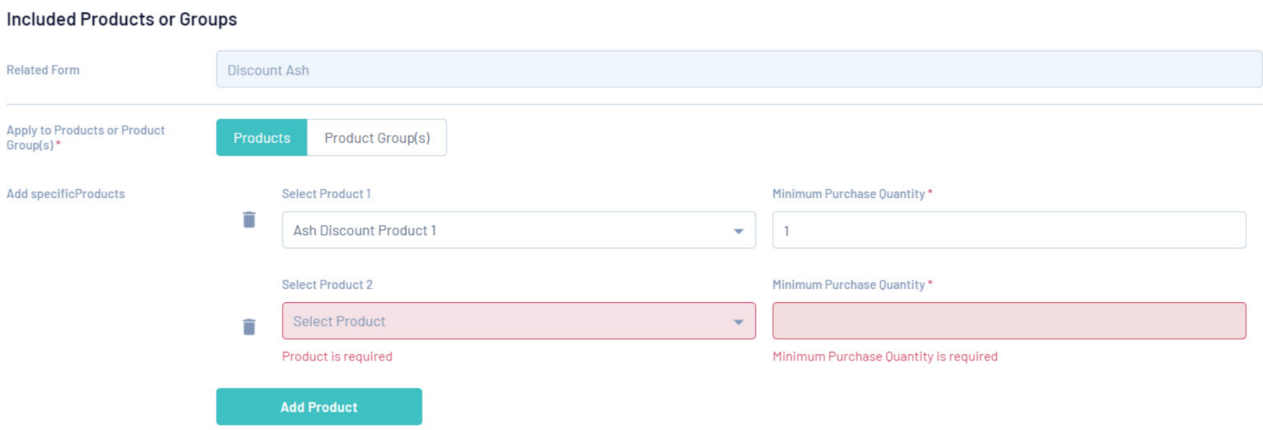
6. Input a name for the bundle discount and input a description (optional).

7. Add in an available to and available from date.

8. Keep status as ACTIVE > click CONTINUE.

9. Select what products/product groups you wish to apply this bundle to and select a minimum number of these a member can select.

If you are using a product group, make sure the group is set up with products listed within it before selecting.



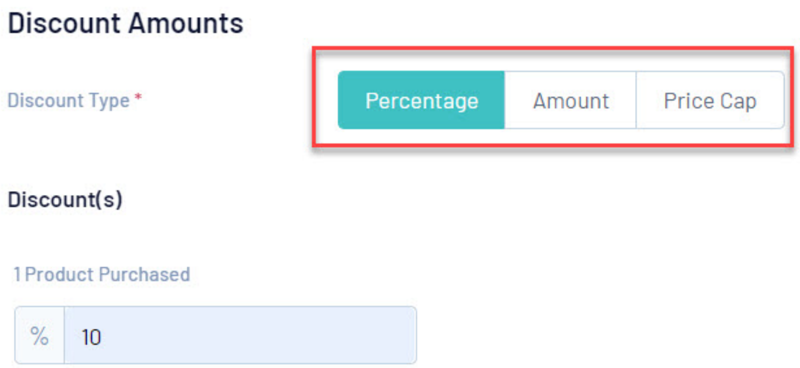
Click CONTINUE.

10. Select what type of discount you want to apply and input the value you want to apply.

You can choose between:

- Percentage
- Amount
- Price Cap

More information related to each of these can be foundhere.

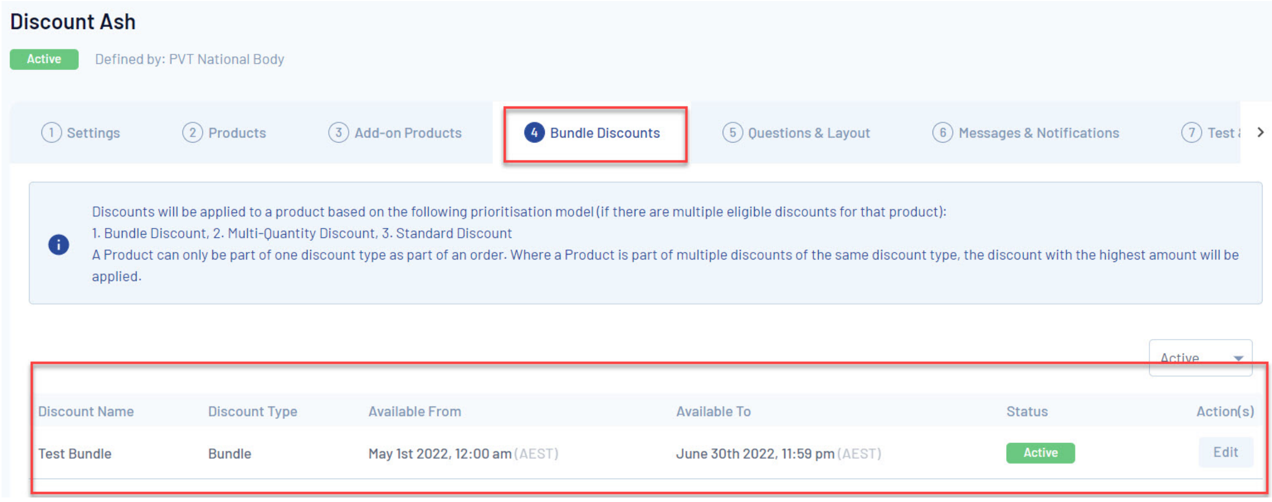


Click **CONTINUE**.

11. Review what you have set and change if needed.

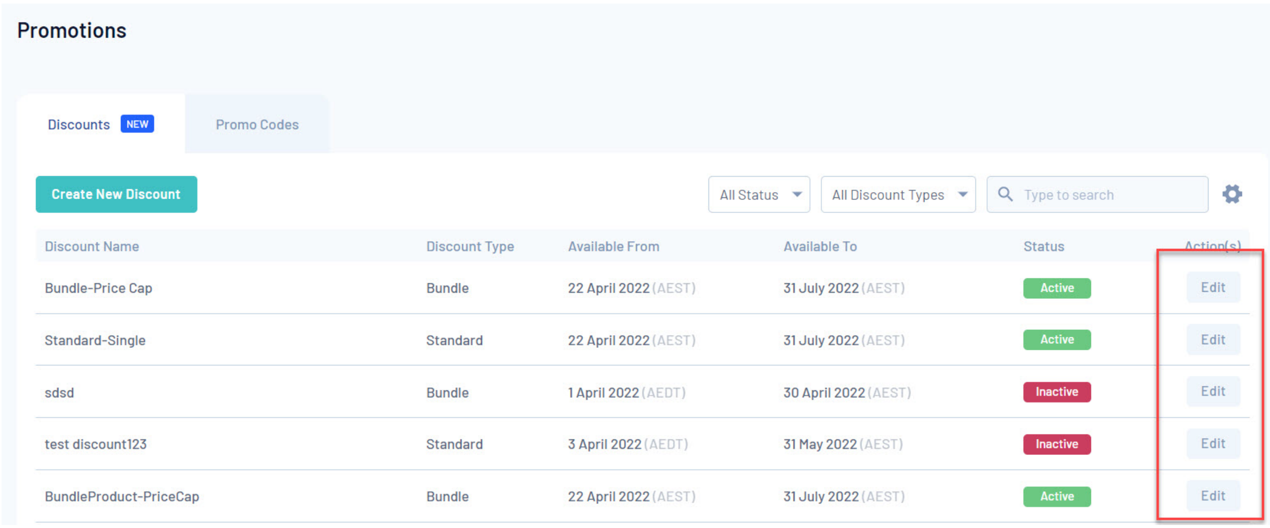
12. Confirm and save.

This discount will now be applied and displayed within the form you selected:



Can I adjust the type of discount for my bundle?

Yes, if you want to change the type of discount applied for your discount bundle (e.g percentage to amount) then you can do so via clicking EDIT against the bundle discount via the PROMOTIONS page.



Related Articles

How can I set up a series of Family Discounts?

Last Modified on 16/06/2022 11:06 am AEST

Family Discounts are a common registration scenario for junior sports and are a great way to incentivise participation across a group of siblings or large families.

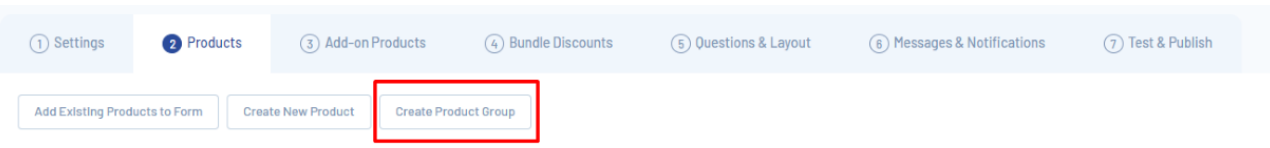
An example of a family discount structure could be:

> If 3 members are registered as part of the same transaction, the registrant receives a 10% discount on their total fee.
>
> If 4 members are registered as part of the same transaction, the registrant receives a 15% discount on their total fee.
>
> If 5 members are registered as part of the same transaction, the registrant receives a 20% discount on their total fee.

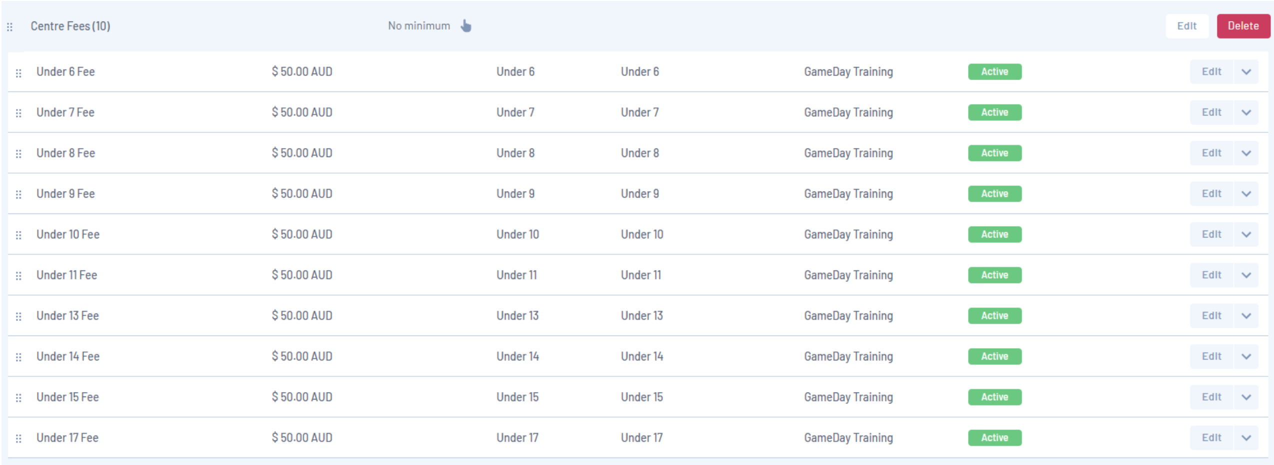
Using this fee structure, you can set up a series of family discounts on your registration form using the below process.

1. Create a Product Group on your Membership Form to bundle all of your membership products.

Navigate to **Membership Forms** > **Edit your chosen form** > **Products** > **Create Product Group** > **Give your Product Group a name** > **Save**

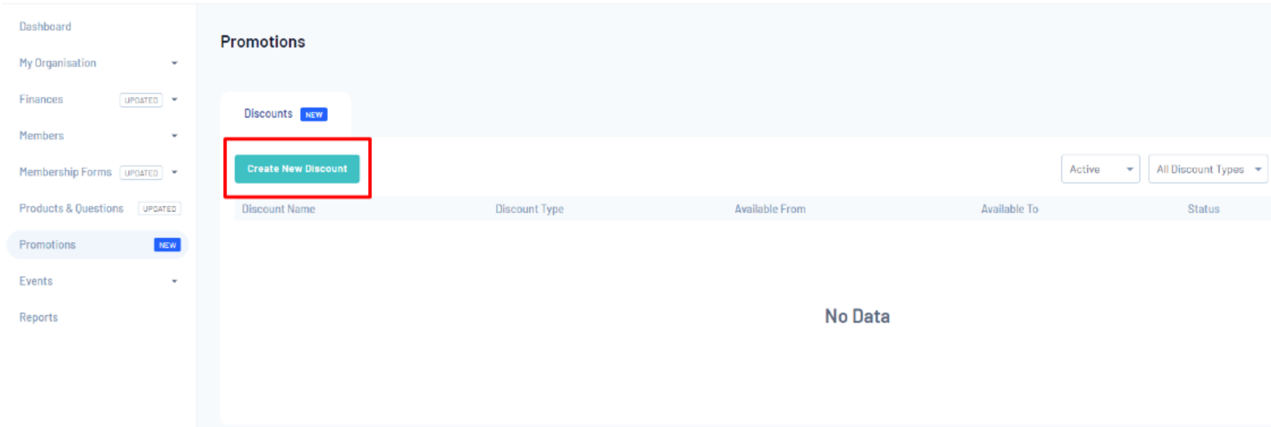


2. Drag and drop all of your membership products into your new product group.



3. Create your family discounts

On the left-hand menu navigate to **Promotions > Create New Discount**



4. Next, we'll create three discounts to reflect the scenario at the top of this article. These discounts would be configured as below:

Discount 1

Discount Details

Discount Type: Bundle Discount

Related Form: Select the form to which you wish to apply your discounts.

Name: Family Discount - 3 Registrations

Available From/Available To: Consider how long you want to offer this discount for and apply a date range accordingly.

Products & Groups

Apply to: Product Group > Select the Product Group you created in step 1-2

Minimum Purchase Quantity: 3

Discount Amounts

Percentage: 10%

Discount 2

Discount Details

Discount Type: Bundle Discount

Related Form: Select the form to which you wish to apply your discounts.

Name: Family Discount - 4 Registrations

Available From/Available To: Consider how long you want to offer this discount for and apply a date range accordingly.

Products & Groups

Apply to: Product Group > Select the Product Group you created in step 1-2

Minimum Purchase Quantity:4

Discount Amounts

Percentage: 15%

Discount 3

Discount Details

Discount Type: Bundle Discount

Related Form: Select the form to which you wish to apply your discounts.

Name: Family Discount - 5 Registrations

Available From/Available To: Consider how long you want to offer this discount for and apply a date range accordingly.

Products & Groups

Apply to: Product Group > Select the Product Group you created in step 1-2

Minimum Purchase Quantity: 5

Discount Amounts

Percentage: 20%

Once created, these discounts will automatically apply to your selected Membership Form, and the discounts will be calculated at checkout!

Related Articles

Types of Discounts?

Last Modified on 23/05/2022 12:24 pm AEST

Below provides a detailed explanation of the type of discounts that can be created/managed.

Discounts are calculated via **AMOUNT** or **PERCENTAGE** and they can be applied to all active products within your product listing, a specific product type (e.g membership and/or events) or applied to a specific product/s. Some discounts will apply.

STANDARD DISCOUNTS

Standard discounts are those that are applied to one specific product/set of products and no other ones (e.g $10 discount on all products for Black Friday Sale).

This type of discount is only applied to specific products.

STANDARD - SINGLE QUANTITY

A standard single quantity discount is one that is applied to a specific product if more than one of it is purchased (e.g 15% discount if one jersey is bought, or all products are bought once on a black friday sale).

You can create this one of two ways. You can create this as a normal product (where you can't select more than one quantity) or if a member can select more than one quantity of the product then you'd create the product as an ADD ON product to allow multiple quantities to be purchased. When selecting multiple quantities of the product/s that are using the standard discount, this discount will only apply to the one purchase of this product.

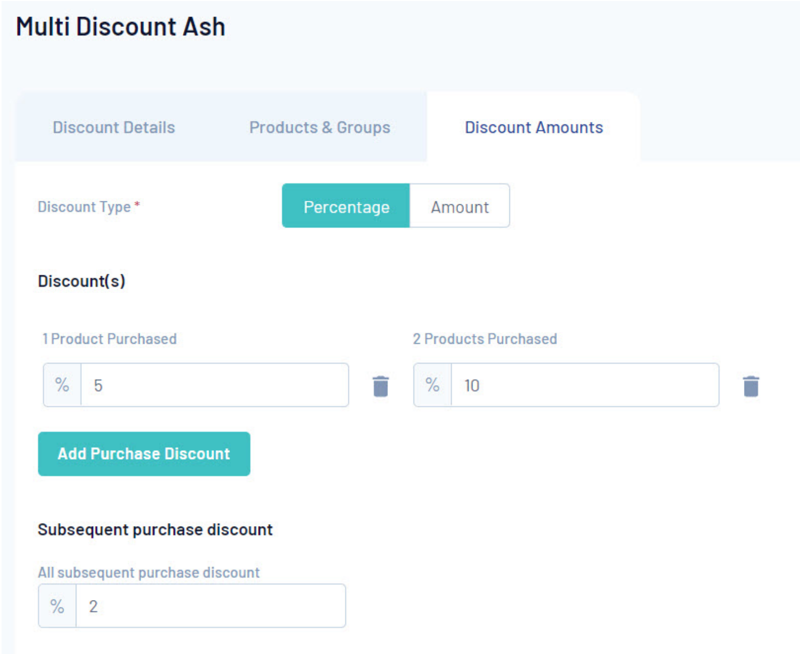
STANDARD - MULTIPLE QUANTITY

A standard multiply quantity discount is one that is applied to multiple of the same product.

You would create a product for this type of discount as anadd on product, so it allows multiple to be selected. When selecting multiple quantities of this product/s then the discount will apply to however many quantities the discount allows.

If a member gets a bigger discount when purchasing more than one of a product, make sure when creating the discount, the perctage/amount is lower for one quantity purchased and higher for the second quantity of the product purchased and so on.

For example, you get a 5% discount on purchasing one jersey but if you purchase two jerseys you get a bigger discount of 10% so you would have it created like the below.



- Multi-quantity discount calculates against the original price and takes priority over any standard discount within the same purchase order
    - if there are 2 or more multi-quantity discounts applicable for the same product, the highest discount amount would apply
    - if both are equal, the most recently created discount would apply

---

BUNDLE DISCOUNT

A bundle discount is one where there are multiple products that get discounted by a certain percentage or price.

These types of discounts are applied to both a form/s as well as products or product groups.

For example if a member purchases Product A, Product B and Product C, they recieve a 15% discount of the total price.

Bundle discounts rely on having all products within the bundle selected in order for the discount to apply. So if you select only one product from within the bundle discount the discount will become void and not apply, so if any of those products, if they can be purchased separately but still have discounted price, then these also need to have standard discounts applied to them, themselves.

Bundle discounts have an additional Price Cap option for the discount amounts. This means the bundle can have a set limit on how much it will cost per product set or group which limits the overall price of these products. For example if a product group containing 4 products has a price cap of $200 and each product is worth $75, then each product will have $25 deducted from its price decreasing the collective amount for these products from $300 to $200.

Related Articles

Question Data Dashboard Report

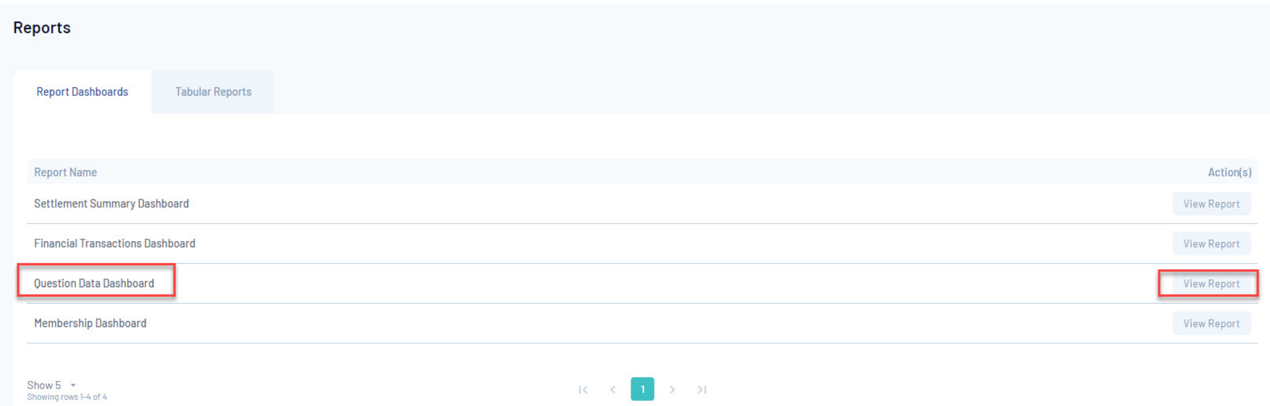
Last Modified on 27/04/2021 10:24 am AEST

The Question Data Dashboard Report will display information within individual graphs in which you can then export as individual graphs or one large graph. This dashboard report is available to all Organisations.

The custom questions answered by members within the form will automatically be pulled into these graphs so there is no need for you to customise a report to gather this information. The column graph and table graph will be the main ones to view if you need information related to the custom questions answered within a form.

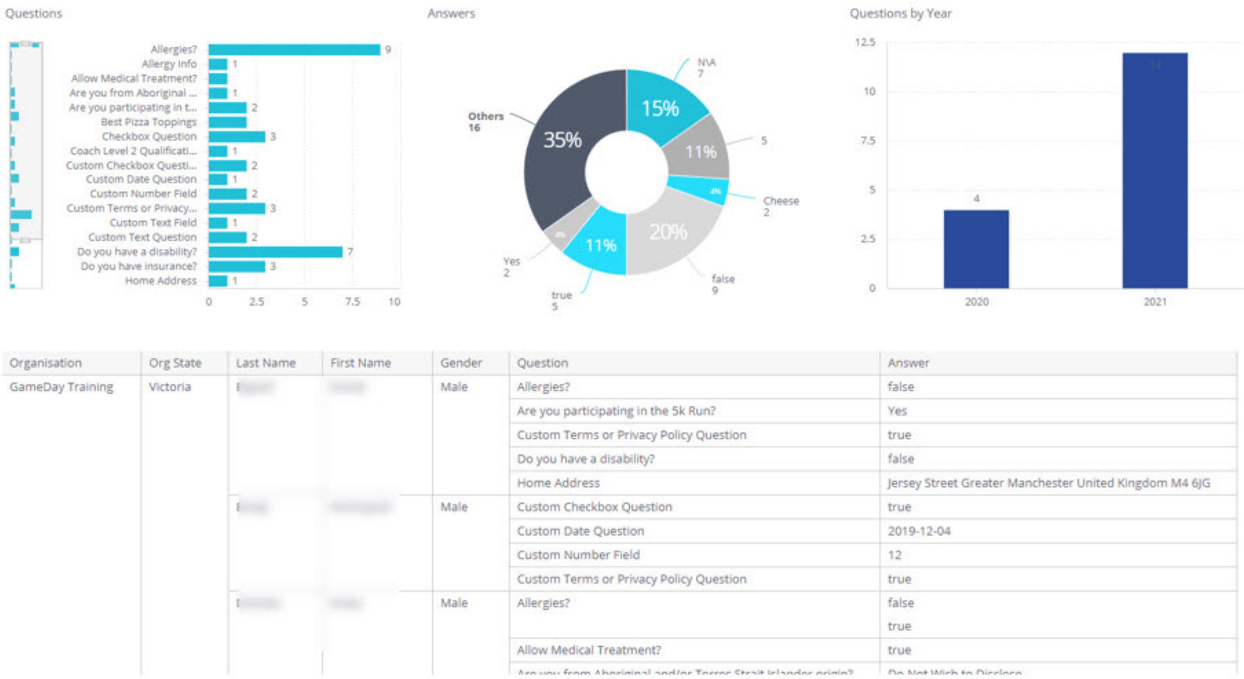
1. Go to **Reports**.

2. On the **Reports Dashboard** tab, click **View Report** against the Question Data Dashboard.



3. This may take a moment or two to load so please be patient.

4. You will then be displayed with different graphs related to the questions members answered via the registration form.



This report shows graphs related to:

- How many members answered what questions
- How many people from each organisation within your heirarchy had members answer these questions
- Full list that shows the member name, organisation, gender and answer to the questions asked within the registration form.
- The percentage of members that answered these questions.

When initially viewing the report, this report should display all the questions that have been answered within the registration forms, so the bar graph should appear similar to the above.

If you need to adjust what questions you want displayed in this bar graph, all you need to do is adjust the filter on the left hand side to what you want to display. Please see below:

How to adjust the report to view/export multiple questions at once?

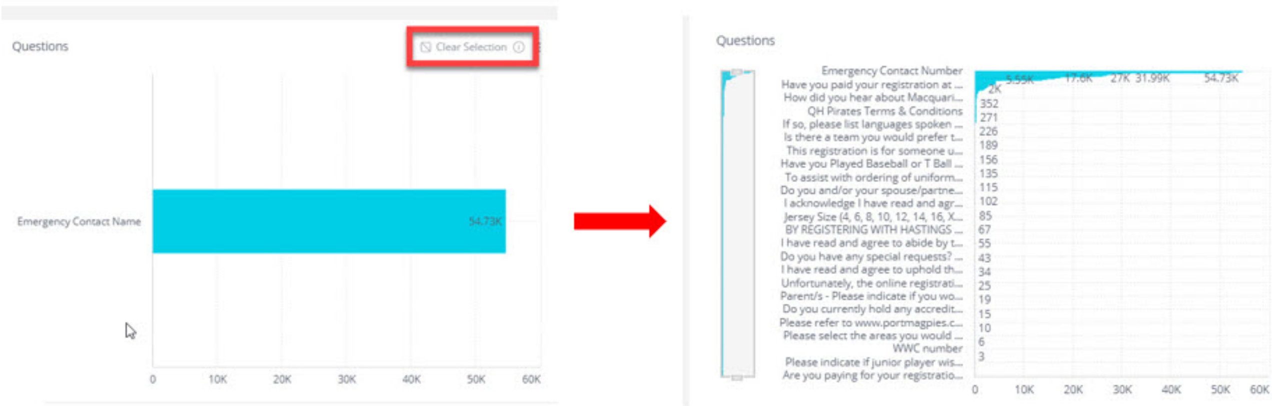
If you want to report on one or more questions within the report, all you need to do is click the graph of your first question that you want listed. Then on the right hand side, click the EDIT button, in which you can select or search more questions to report on. Once happy click OK and the report will adjust to display those questions and answers in the report:

Your browser does not support HTML5 video.

If certain questions have been used through different years/seasons then you will need to filter the specific year these were answered in otherwise the report will base it off all years. To filter via specific years please see the following:

Your browser does not support HTML5 video.

To clear any specific filters for any of the graphs, to where the graphs display all the information, all you need to do is click CLEAR SELECTION on each of the graphs:



NOTE: for those organisations that have the ***events*** module enabled this report will display slightly different. To only report on the questions answered within a registration form adjust the filter on the right hand side to only include the **MEMBERSHIP** product type and the relevant registration **FORM NAME**. All others parts of this report will remain the same.

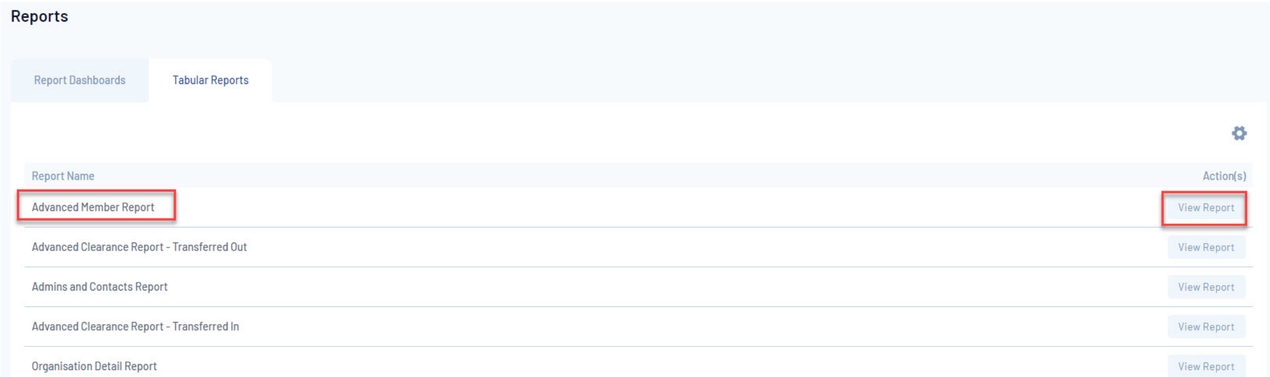
Related Articles

Advanced Member Report

Last Modified on 27/04/2021 10:33 am AEST

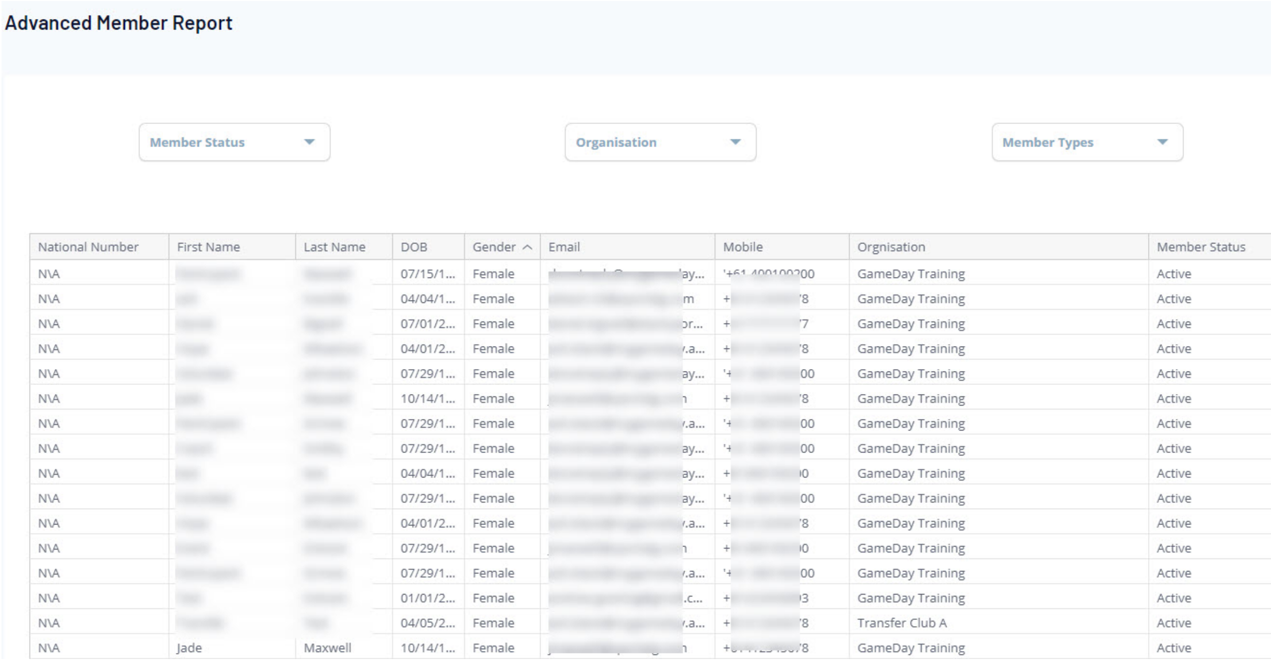
1. Go to **Reports**, click on **Tabular Reports.**

2. Next to the **Advanced Member Report**, click **View Report**.



The **Advanced Member Report** will display the information for members related to:

- contact details
- selected member types
- national number (if the sport uses this)
- financial status at each level and the start and end date for those registrations.
- member status



Advanced Member Report

Member Status | Organisation | Member Types

National Number	First Name	Last Name	DOB	Gender	Email	Mobile	Orgnisation	Member Status
N\A	[illegible]	[illegible]	07/15/1...	Female	[illegible]ay...	'+61 400100200	GameDay Training	Active
N\A	[illegible]	[illegible]	04/04/1...	Female	[illegible]m	+[illegible]'8	GameDay Training	Active
N\A	[illegible]	[illegible]	07/01/2...	Female	[illegible]or...	+[illegible]'7	GameDay Training	Active
N\A	[illegible]	[illegible]	04/01/2...	Female	[illegible].a...	+[illegible]'8	GameDay Training	Active
N\A	[illegible]	[illegible]	07/29/1...	Female	[illegible]ay...	'+[illegible]00	GameDay Training	Active
N\A	[illegible]	[illegible]	10/14/1...	Female	[illegible]n	+[illegible]'8	GameDay Training	Active
N\A	[illegible]	[illegible]	07/29/1...	Female	[illegible].a...	'+[illegible]00	GameDay Training	Active
N\A	[illegible]	[illegible]	07/29/1...	Female	[illegible]ay...	'+[illegible]00	GameDay Training	Active
N\A	[illegible]	[illegible]	04/04/1...	Female	[illegible]ay...	+[illegible]0	GameDay Training	Active
N\A	[illegible]	[illegible]	07/29/1...	Female	[illegible]ay...	'+[illegible]00	GameDay Training	Active
N\A	[illegible]	[illegible]	04/01/2...	Female	[illegible].a...	+[illegible]'8	GameDay Training	Active
N\A	[illegible]	[illegible]	07/29/1...	Female	[illegible]n	+[illegible]0	GameDay Training	Active
N\A	[illegible]	[illegible]	07/29/1...	Female	[illegible].a...	'+[illegible]00	GameDay Training	Active
N\A	[illegible]	[illegible]	01/01/2...	Female	[illegible].c...	+[illegible]3	GameDay Training	Active
N\A	[illegible]	[illegible]	04/05/2...	Female	[illegible].a...	+[illegible]'8	Transfer Club A	Active
N\A	Jade	Maxwell	10/14/1...	Female	[illegible]n	+[illegible]78	GameDay Training	Active

Use the scroll bar at the bottom of the report to scroll through the table. You can filter this report to display based on a member status, organisation (if you are higher in the heirarchy) and member types.

Note: **true** refers to yes or active, while **false** refers to no or inactive.

Related Articles

Transaction Report (Basic Details)

Last Modified on 03/05/2021 11:03 am AEST

1. Go to **Reports**, click on **Tabular Reports.**

2. Next to the **Transaction Report (Basic Details),** click **View Report**.

This **Member Transaction** report, provides basic details into the transactions that have occurred for your organisation. It provides information related to:

- organisation
- member type selected
- financial status
- order details
- transaction details
- product details
- settlement details

Transaction Type	Payment Method	Payment Type	Order Status	Transaction ID	Product Name	Product Type	Product Price	Product Status	Quantity	Item A
Payment	Braintree - Credit ...	Online	Paid	763116	active	Membership	$30	Active	1	1
Payment	Braintree - Credit ...	Online	Paid	763117	active	Membership	$30	Active	1	1
Payment	Braintree - Credit ...	Online	Paid	763119	active	Membership	$30	Active	1	1
Payment	Braintree - Credit ...	Online	Paid	763120	active	Membership	$30	Active	1	1
Payment	Braintree - Credit ...	Online	Paid	763124	active	Membership	$30	Active	1	1
Payment	Braintree - Credit ...	Online	Paid	763125	active	Membership	$30	Active	1	1
Payment	Braintree - Credit ...	Online	Paid	763126	active	Membership	$30	Active	1	1
Payment	Braintree - Credit ...	Online	Paid	763127	active	Membership	$30	Active	1	1
Payment	Braintree - Credit ...	Online	Paid	763161	active	Membership	$30	Active	1	1
Payment	Braintree - Credit ...	Online	Paid	763162	active	Membership	$30	Active	1	1
Payment	Braintree - Credit ...	Online	Paid	763163	active	Membership	$30	Active	1	1
Payment	Braintree - Credit ...	Online	Paid	763179	active	Membership	$30	Active	1	1
Payment	Braintree - Credit ...	Online	Paid	763180	active	Membership	$30	Active	1	1
Payment	Braintree - Credit ...	Online	Paid	763181	active	Membership	$30	Active	1	1
Payment	Braintree - Credit ...	Online	Paid	763187	active	Membership	$30	Active	1	1
Payment	Braintree - Credit ...	Online	Paid	763188	active	Membership	$30	Active	1	1
Payment	Braintree - Credit ...	Online	Paid	763198	active	Membership	$30	Active	1	1
Payment	Braintree - Credit ...	Online	Paid	763199	active	Membership	$30	Active	1	1
Payment	Braintree - Credit ...	Online	Paid	763200	active	Membership	$30	Active	1	1

NOTE: **true** refers to active, while **false** refers to inactive. **Committed** refers to unpaid.

IF YOUR ORGANISATION IS SET UP AS AN ACTIVE KIDS VOUCHER PROVIDER:

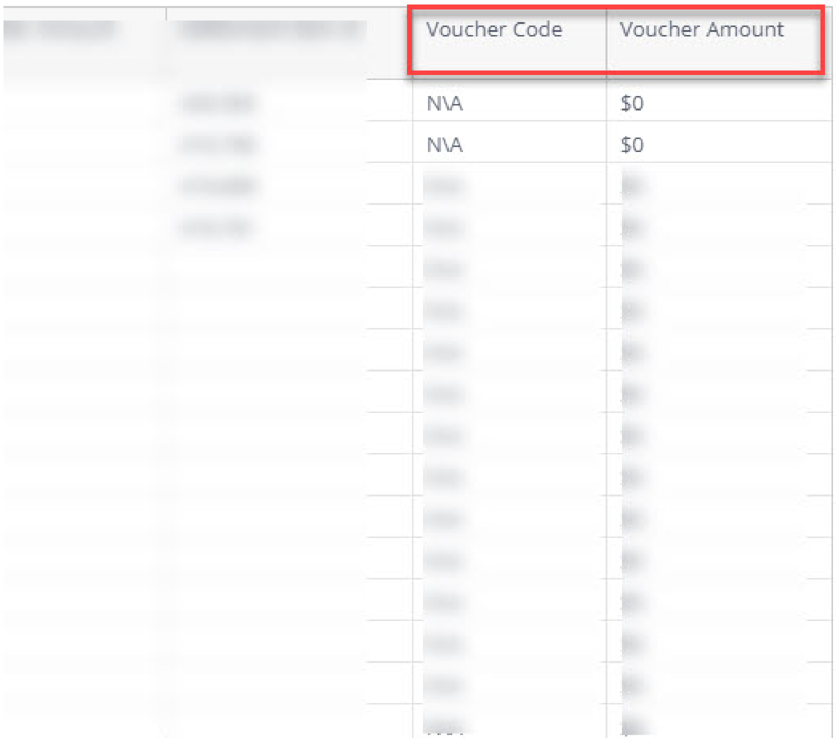
If your organisation is set up to take Active Kids vouchers, you will also be able to see the voucher code used and the voucher amount when running this report.

You will see two fields related to the vouchers:

- Voucher Code
- Voucher Amount

These two columns will display the voucher code that the member used and the amount of the voucher. This will be either $100 or less (depending on the price of your products and what products the member purchased).

If the columns shows N/A or $0 it means that member didn't use an Active Kids Voucher to purchase products.



Related Articles

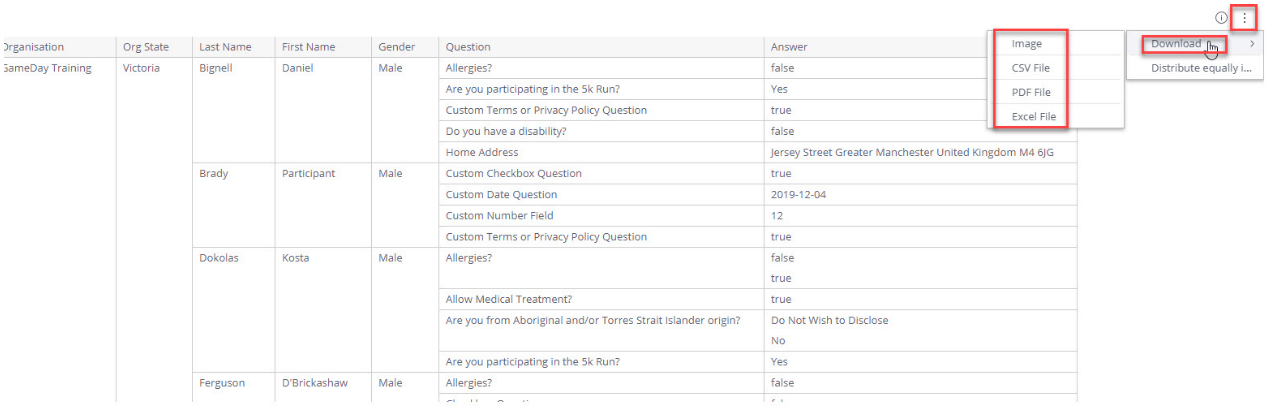
Tabular Report: Exporting Reports

Last Modified on 21/06/2022 1:54 pm AEST

Exporting the **Tabular Reports** is slightly different than exporting the reports from the Reports Dashboard. The reports can be exported into a PDF, Image or CSV file.

To export these reports, click on the **second set of three dots** in the top right hand corner of the report.

The hover over the **download** menu and select your **export type**.



Related Articles

Tabular Reports: Filtering

Last Modified on 27/04/2021 11:08 am AEST

There has been some changes to the way the Tabular reports can be filtered- previously they could only be filtered by certain fields however now admins are able to filter via a variety of different fields depending on what they want out of the report. This filtering option is available in all the Tabular reports.

The fields in each of the reports will vary so the steps below are more of a guide on how the filters work in general rather than specifically how to filter every generic field. Use this as a guide on how to filter the reports - if you are still unsure how to best filter your report based on the process below please email the support team who can provide further assistance.

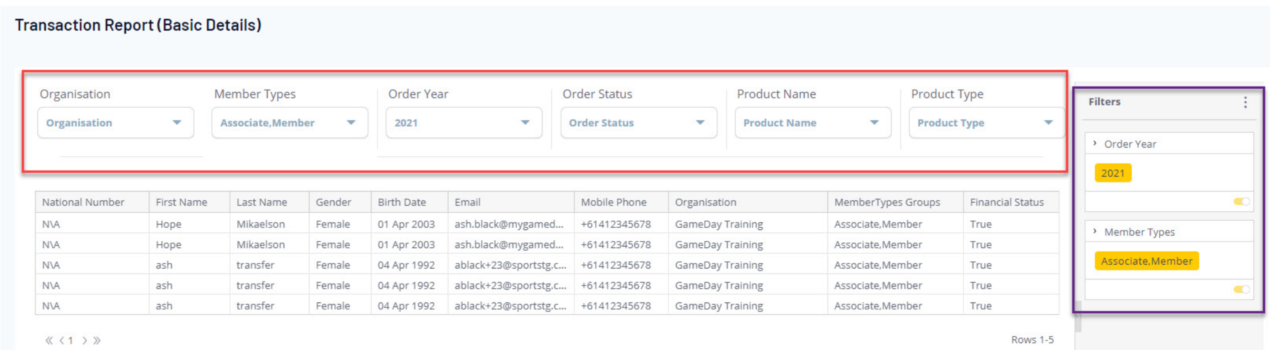
These new filtering options will mainly be used for the transactions reports and filtering the*order year* down even further.

NOTE: only the generic drop down fields at the top of the report can be filtered, so if you require anything more specific for your report then it will be best to export based on the current filters and then filter further within a excel/CSV.

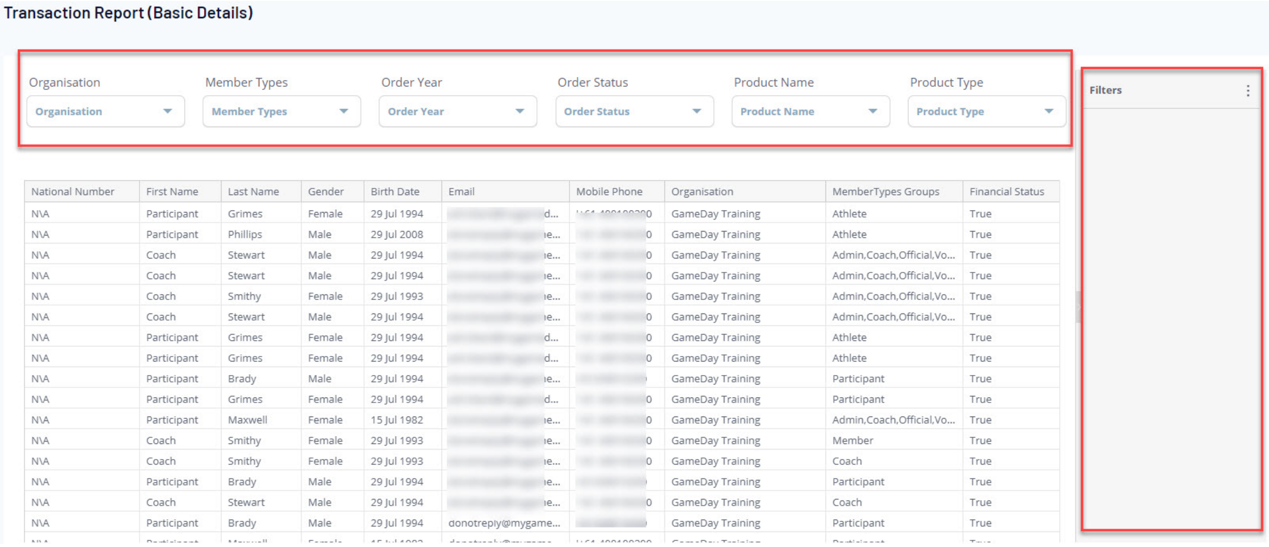
The reports now enable an admin to report via one of two ways:

1. By **generic** filter; like specific organisation, order year, status, member type etc.

2. By **specific** fields within each generic filter; like only one or two member types, within the last 60 days etc.This type of filter will appear once you select a generic filter.

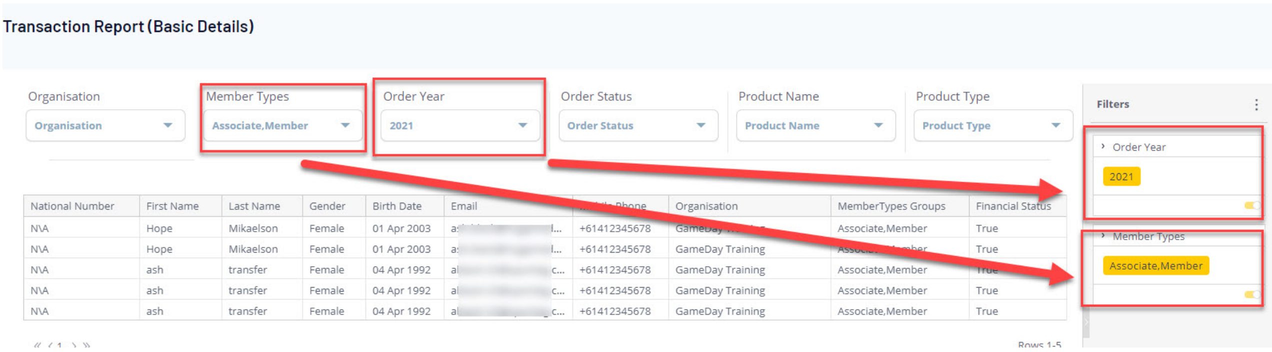


When you view a report you may notice that there are no filter options on the left hand side and this is becuase the report is currently fitering all the information related to all the generic fields.

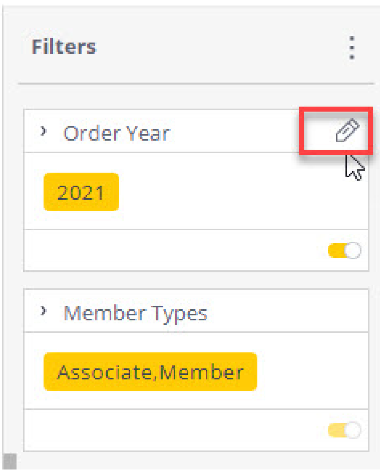


Once you start filtering based off those generic fields this will then display thosespecifc fields on the right hand side of the screen in which you can then filter even more. Some filters will also have a search bar to make it easier.

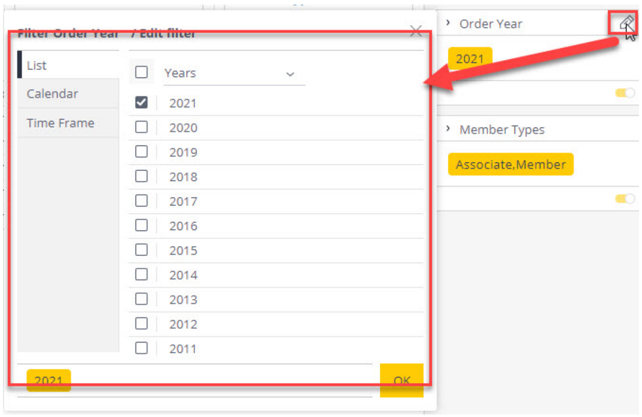
In this example we will use the ***Order Year*** *as the main filter as this has quite a few options to it.*



To edit these filters or see more specific fitlers click on the**pencil icon** when *hovering* over the right hand corner of these boxes.



Once you click on this**pencil icon**, this will display another branch pop up which allows the admin to select further options to select for this filter field.

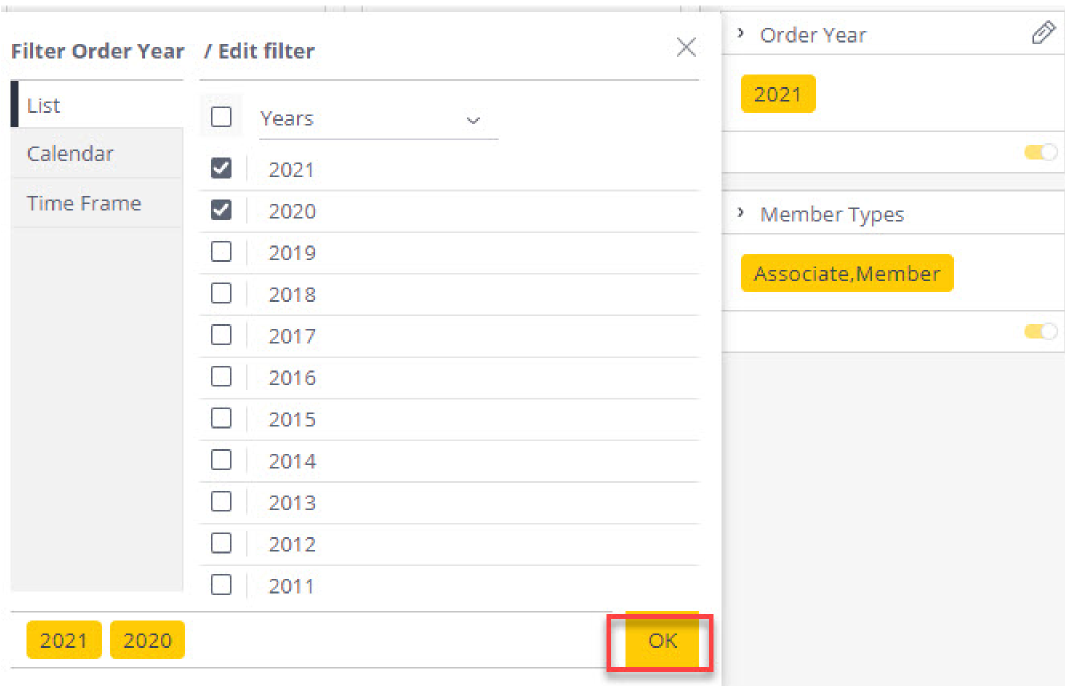


This particular filter provides the admin with the option to filter the report more specifically by a list, calendar and timeframe in relation to the order year selected.

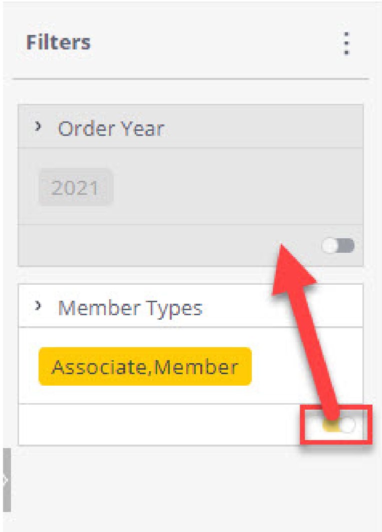
The order year can be filtered several ways:

- BY LIST - this allows you filter by different time periods, like years, months, days etc- just click the arrow on the drop down list
- BY CALENDAR - this allows you to filter by selecting a certain period within a calendar view, selecting a particular quarter via the drop down list, or manually inputting a from-to date.
- BY TIMEFRAME - this allows the user to filter by selecting a specific timeframe, in terms of years, months, days etc.

Once you are happy with filters click the**OK** button at the bottom of that filter to apply those changes. The report may take a couple of seconds to render the changes so please be patient.



If you have applied filters but would like to revert the report back to show all the information, just click the **switch button** which will disable these filters (will be greyed out) and render the report back to the generic filters. Make sure you also adjust the generic filters at the top back to no selection in order to get all information.



NOTE: if you filtered the report and then leave the report, the filters will remain on the report the next time you view it - to change this, remove the filters or adjust the filters like in the steps above.

Related Articles