

ServeSPORT

# ClubServe

# User Manual

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# USING THIS MANUAL

## INTRODUCTION

This document is the reference manual for the ClubServe club management software system. It details how to access and use the pages in the system and is referenced directly by the help links on each page of the system.

Please note that this manual assumes that the system is being used on a desktop computer and, as such, may describe page elements as being on the left-hand or right-hand side of the page – this will not necessarily apply if you are using the system on a smaller screen device, such as a tablet or smart phone.

We recommend that you read the WELCOME TO CLUBSERVE section if you are new to the system – this will provide you with details of the terminology used throughout the manual and details of the page layout navigation employed throughout the system.

We have also produced a HOW TO guides document which contains step by step instructions for many of the common functions you will want to carry out on the system, e.g., how to add a contact, how to add an event, etc.

[Click HERE to open the HOW TO guides document](#)

A handwritten-style graphic in blue ink that says "Thank you!". The text is written in a cursive, flowing script with a long, sweeping underline that extends under the word "you".



# WELCOME TO CLUBSERVE

## INTRODUCTION

ClubServe is a cloud-based sports business management system that enables national governing bodies, clubs and sports development organisations to manage the day-to-day administration and enables them to provide their customers with an easy-to-use portal to manage their membership and book on events.

It consists of a number of modules which can be tailored to meet the needs of your organisation.

ClubServe enables your organisation to choose your preferred online payment provider from a wide variety of market leaders such as SagePay, Paypal, Stripe and GoCardless.

## MODULES

### BOOKKEEPING

The BOOKKEEPING module enables your organisation to:

- Manage the organisation's day to day bookkeeping;
- Record income (money in) and expense (money out) transactions;
- Categorise transactions;
- Produce account statements;
- Produce account summaries;
- Produce invoices and record payments against them;
- Produce end of year/interim reports.

### COMPETITIONS

The COMPETITIONS module enables your organisation to:

- Set up an unlimited number of competitions such as ladders, leagues and tournaments, for any type of sport or activity;
- Set up competitions for specific gender and age groups;
- Generate tournament draw sheets automatically;

- Set up ladders to process end of season promotion and relegation automatically;
- Enable members and non-members to enter competitions online via the customer portal, record their results (and match comments) and track progress;
- Publish results to the customer portal as news items.

## CLUB AFFILIATION

The CLUB AFFILIATION module enables your organisation to:

- Record affiliation information;
- Submit the affiliation application online;
- Update the club information at any time during the year.

**PLEASE NOTE – the CLUB AFFILIATION module is available to clubs whose access to ClubServe is provided by their governing body.**

## CLUB REVIEWS

The CLUB REVIEWS module enables your organisation to:

- Self-assess its governance and operating policies/procedures;
- Produce a strengths/weaknesses analysis;
- Produce an action list to enable the organisation to make any necessary changes;
- Access a wide range of relevant resources and guidance;
- Populate the club development plan automatically with relevant actions.

**PLEASE NOTE – the CLUB REVIEWS module is available to clubs whose access to ClubServe is provided by their governing body.**

## CONTACTS

The CONTACTS module enables your organisation to:

- Easily add and update an unlimited number of individuals and organisations on the system as contacts;
- Record any type of information about the contacts and easily search for data via the contact query tool;
- Record notes, conversations, emails and texts with contacts on the system;
- Create an unlimited number of contact groups, enabling your organisation to group contacts by any criteria, e.g., volunteers, coaches, new members, squads, etc.
- Promote activities and events to targeted contacts via email or text.

## CUSTOMER PORTAL

The CUSTOMER PORTAL module enables your organisation to:

- Provide customers with an easy-to-use app to manage their account, make and cancel bookings, enter competitions, keep up to date with activities at your organisation, etc.;
- Tailor the services provided to customers;
- Market activities and events.

## DOCUMENT LIBRARY

The DOCUMENT LIBRARY module enables your organisation to:

- Upload and categorise documents;
- Use the governing body checklist to ensure your organisation is meeting best practice standards;
- Share access to documents with relevant personnel and third-parties.

**PLEASE NOTE – the DOCUMENT LIBRARY module is available to clubs whose access to ClubServe is provided by their governing body.**

## EVENTS

The EVENTS module enables your organisation to:

- Easily create and manage a wide variety of event types such as coaching courses, fitness sessions, pay and play sessions, holiday camps, performance squads, conferences, ticketed events and social events;
- Create events across an unlimited number of venues and sites;
- Create events for an unlimited number of different types of sports and activities;
- Enable members and non-members to book places online via the customer portal, for themselves and anyone associated with them such as children and spouses;
- Set up different types of fees and payment options, including the ability to provide preferential options for members, existing customers and priority customers;
- Set up the system to take payment via the payment provider of your choice from our wide range of suppliers such as Stripe, Paypal, SagePay, GoCardless, etc. – your organisation controls who it uses and what commission it pays;
- Enable coaches to manage registers online, including the option to record the arrival and departure of children and to record comments and risk assessments;
- Book out courts, pitches and other types of resources such as meeting rooms when setting up events;
- Display custom event calendars to let customers know what is going on at your venue;
- Monitor ‘no-shows’ and suspend booking rights if the organisation’s booking rules are broken;
- Create and complete progress reports for customers/parents that can be viewed on the customer portal.

## **MEMBERSHIP**

The MEMBERSHIP module enables your organisation to:

- Easily set up and manage a membership scheme;
- Enable your organisation to set up any type of membership category, including family and group memberships;

- Enable non-members to take out membership online via the customer portal;
- Enable members to easily manage their membership online via the customer portal;
- Set up discounts as required for family/groups, spouses, children, early payment and loyalty;
- Take payment by debit/credit card and by direct debit;
- Analyse and review budgets and income;
- Track types of members such as new members to enable your organisation to provide tailored services and support;
- Produce a wide variety of reports.

## **PERSONNEL MANAGEMENT**

The PERSONNEL MANAGEMENT module enables your organisation to:

- Assign coaches and workers to events;
- Record timesheets for staff, coaches and workers;
- Record and track qualifications and training requirements, and generate automatic reminders for when mandatory training is required to be undertaken;
- Provide coaches and workers with their own app version of the system, enabling them to track their diary, take registers, and record comments/progress on their pupils.

## **PROJECT PLANS**

The PROJECT PLANS module enables your organisation to:

- Create and manage an unlimited number of project plans;
- Create and track objectives and actions and assign said actions to contacts both within and outside of your organisation;
- Send out automated emails with project updates for assigned people, with the ability for said people to update progress on their project actions without having to log into the system;

- Create customised Club Development Plans if your organisation is a sports club;
- Attach documents and files to a project and run reports on progress.

## RESOURCES

The RESOURCES module enables your organisation to:

- Set up and manage any type of resource that you want customers to book, such as courts, pitches, lanes, rooms, equipment, etc.;
- Create any length of booking period, e.g., one hour, 90 minutes, etc.;
- Enable members and non-members to book resources online via the customer portal, for themselves and anyone associated with them such as children and spouses;
- Set up different types of fees and payment options, including peak, off-peak, etc.;
- Set up booking and pricing rules, including provision for limiting the number of bookings made by membership category;
- Require customers to provide details of who they are playing with;
- Mark resources as unavailable, e.g.; for maintenance.

## RESOURCE LIBRARY

The RESOURCE LIBRARY module enables your organisation to:

- Access a wide range of governing body resources;
- Easily find relevant resources by category.

**PLEASE NOTE – the RESOURCE LIBRARY module is available to clubs whose access to ClubServe is provided by their governing body.**

## TEAMS

The TEAMS module enables your organisation to:

- Set up an unlimited number of teams on the system for any type of sport/activity and for any type of league;
- Provide members and non-members with the ability to express their interest in participating in matches via the customer portal;
- Assign players to teams as team members or reserves, and assign captains;
- Create team fixtures as events on the system and record results;
- Set up and collect match fees via the customer portal;
- Enable team members to track results via the customer portal.



# GETTING STARTED

## INTRODUCTION

This section of the manual details how to access the system, how to use the common design features, and how to locate and use the modules within the system.

## TERMINOLOGY USED

Module	<p>This is the term we use to describe sub-sections of the system, e.g., CONTACTS, MEMBERSHIP, etc.</p> <p>A module will usually have its own menu item in the main menu and will have its own menu page.</p> <p>Some examples of modules available on the system are as follows:</p> <ul style="list-style-type: none"> <li>• Contacts</li> <li>• Membership</li> <li>• Events</li> <li>• Resources</li> <li>• Bookkeeping</li> <li>• Project Plans</li> </ul>
Module Menu	<p>Each module on the system has its own menu page which can be displayed by clicking on the module name in the main menu, e.g., clicking on CONTACTS in the main menu displays the CONTACTS module menu.</p>
Contact	<p>This is the term we use to represent an individual or organisation whose details are recorded on the system.</p>

	<p>You can add an unlimited number of contacts to the system.</p>
Event	<p>This is the term we use to describe the courses and sessions that an organisation can host, e.g., coaching courses, holiday camps, workshops, conferences, social events, etc.</p>
Sign In	<p>This is the term we use for the process of gaining access to the system via the use of a user ID and a password.</p>
MultiClub	<p>This is the term we use for a club that is accessing the system via their governing body.</p> <p>There are separate additional modules available to a MultiClub user and these are documented in this manual.</p>
Resource	<p>This is the term we use to describe a physical entity that your organisation makes available to be booked out, e.g., a court, pitch, swimming/track lane, ball machine, meeting room, etc.</p>
Rate Period	<p>This is the term we use to describe a date/time range that details the costs for something, e.g., to book a resource, take out membership, etc.</p>

## ACCESSING THE SYSTEM

ClubServe can be used either as a web service via a web browser, or as an App that you download from either the Apple Store, Google Play, or the Microsoft Store.

### ACCESSING THE SYSTEM – WEB BROWSER

#### GETTING STARTED

Before you can sign into the system, you will need:

- Access to a web browser, preferably the latest version of Google Chrome, Microsoft Edge, or Apple Safari;
- The URL (web address) of the version of the system that has been set up for your organisation, e.g., <https://yourclubname.clubserve.net>
- Your USER ID and your PASSWORD – these will be issued to you by your system administrator or by your ServeSport contact.

#### SIGNING IN

If you are accessing the system as a sports club via your governing body (MultiClub user), please follow the instructions below for SIGNING IN – MULTICLUB USER.

To sign into the system with your allocated USER ID and PASSWORD:

- Start up your browser and type in the URL (as detailed above) – the system will then display the SIGN IN page;
- Enter your USER ID and PASSWORD and click on the SIGN IN button – the system will then authenticate the details;
- If the USER ID and PASSWORD entered are valid, the system will then display the HOME PAGE – if the details are not valid, the system will display an appropriate message on the screen and prompt you to retry.

#### SIGNING IN – MULTICLUB USER

To sign into the system as a MultiClub user (access to the system is provided by your governing body):

- Start up your browser and type in the URL (as detailed above) – the system will then display the SIGN IN page;

- If you have not registered before, click on the I HAVE NOT YET REGISTERED AND HAVE MY CLUB'S ID AND PASSWORD link and follow the instructions to register to use the system and create your personal USER ID and PASSWORD;
- Enter your USER ID and PASSWORD and click on the SIGN IN button – the system will then authenticate the details;
- If the USER ID and PASSWORD entered are valid, the system will then display the HOME PAGE – if the details are not valid, the system will display an appropriate message on the screen and prompt you to retry.

## **ACCESSING THE SYSTEM - APP**

### GETTING STARTED

Before you can sign into the system, you will need:

- Access to either the Apple Store, Google Play, or Microsoft Store to download the relevant app;
- Details of how to find the app on your chosen store – this information will be provided to you by your system administrator or by your ServeSport contact;
- Your USER ID and your PASSWORD to sign into the ClubServe system – these will be issued to you by your system administrator or by your ServeSport contact

### SIGNING IN

If you are accessing the system as a sports club via your governing body (MultiClub user), please follow the instructions below for SIGNING IN – MULTICLUB USER.

To sign into the system with your allocated USER ID and PASSWORD:

- Click on the downloaded app on your device - the system will then display the SIGN IN page;
- Enter your USER ID and PASSWORD and click on the SIGN IN button – the system will then authenticate the details;
- If the USER ID and PASSWORD entered are valid, the system will then display the HOME PAGE – if the details are not valid, the system will display an appropriate message on the screen and prompt you to retry.

## SIGNING IN – MULTICLUB USER

To sign into the system as a MultiClub user (access to the system is provided by your governing body):

- Start up your browser and type in the URL (as detailed above) – the system will then display the SIGN IN page;
- If you have not registered before, click on the I HAVE NOT YET REGISTERED AND HAVE MY CLUB'S ID AND PASSWORD link and follow the instructions to register to use the system and create your personal USER ID and PASSWORD;
- Enter your USER ID and PASSWORD and click on the SIGN IN button – the system will then authenticate the details;
- If the USER ID and PASSWORD entered are valid, the system will then display the HOME PAGE – if the details are not valid, the system will display an appropriate message on the screen and prompt you to retry.

## USING THE MAIN MENU

The MAIN MENU is the name given to the main menu of the system from which all modules of the system can be accessed.

## ACCESSING THE MAIN MENU

### DESKTOP COMPUTER

The menu is accessed from all pages on the system by moving your cursor to the left of the screen – the system menu will expand to enable you make a selection.

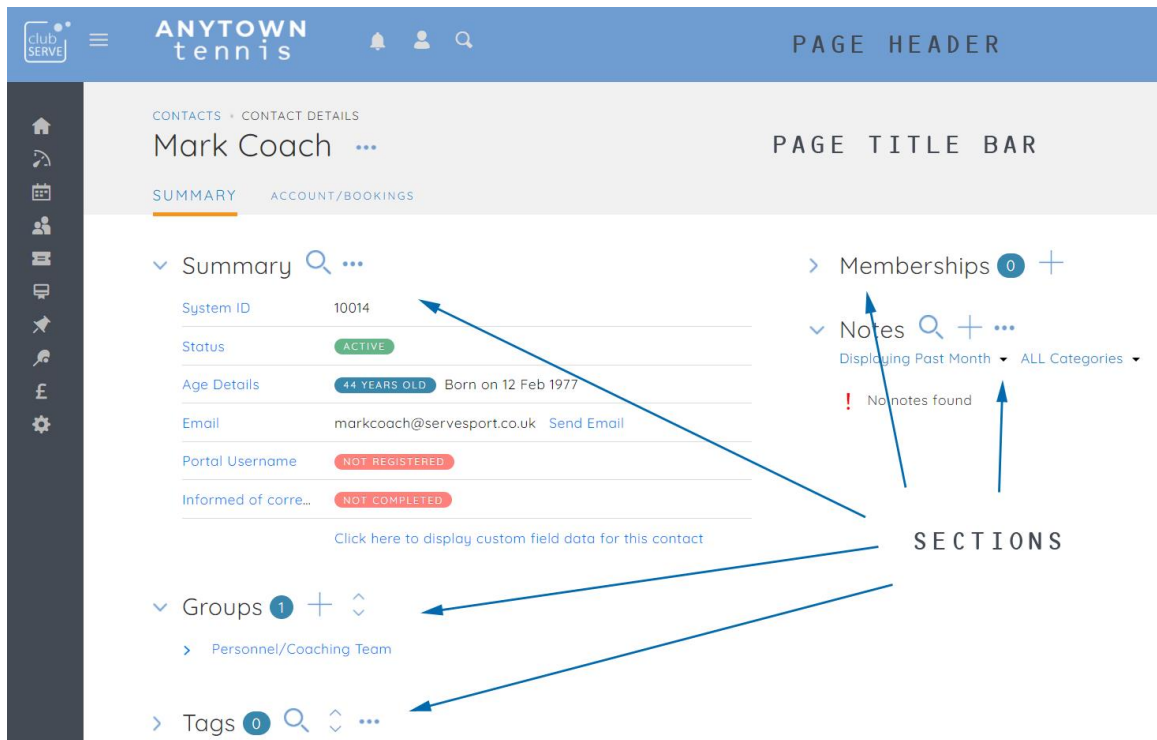
### PHONE/TABLET

The menu is accessed by moving to the top of any page and clicking on the MENU icon.

## MODULE MENU

Each module on the system has its own menu page which can be displayed by clicking on the module name in the main menu, e.g., clicking on CONTACTS in the main menu displays the CONTACTS module menu.

## GETTING FAMILIAR WITH THE PAGE LAYOUT



Pages on the system are structured in the same way to ensure the system is as easy and familiar to use as possible.

### PAGE HEADER



Each page on the system displays a PAGE HEADER area (blue) at the top of the page containing the following:

<p>ClubServe Logo</p>	<p>The ClubServe Logo is displayed in the top left-hand corner of the page header.</p>
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	<p>Clicking on the logo displays the HOME PAGE.</p>
<p>Menu Toggle Icon</p>	<p>This icon enables you to set the mode in which you want the main menu to be displayed.</p> <p>Clicking on the icon switches the mode between the following:</p> <ul style="list-style-type: none"> <li>• DEFAULT MODE – The menu is displayed as a set of icons to the left of each page</li> <li>• FIXED MODE – The menu is displayed as a set of icons and text to the left of each page</li> <li>• HIDDEN MODE – The menu is not displayed but will appear if you place your icon to the far left of the screen</li> </ul>
<p>Your Organisation's Logo</p>	<p>Your organisation's logo is displayed to the immediate right of the menu toggle icon.</p> <p>Clicking on the logo displays the HOME PAGE.</p>
<p>Notifications Icon</p>	<p>This icon displays the YOUR NOTIFICATIONS page when clicked.</p> <p>It displays a red exclamation mark beside the icon when you have unread notifications.</p>
<p>Your Account Icon</p>	<p>This icon displays the YOUR ACCOUNT menu when clicked.</p>

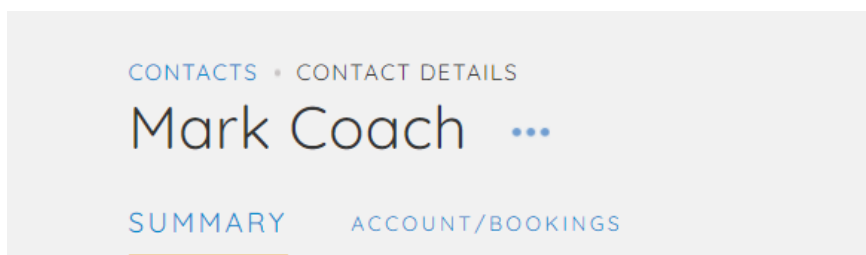


<p>Search Icon</p>	<p>This icon displays the SEARCH function options when clicked.</p> <p>You can use this to quickly search for contacts or events.</p>
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## MAIN MENU

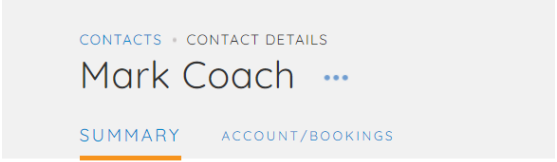
Each page displays the main menu to the left of the screen, depending on the mode set by the MENU TOGGLE ICON.

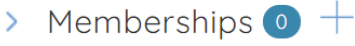
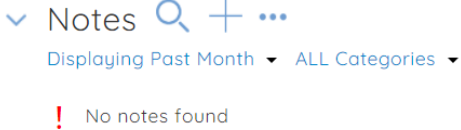
## PAGE TITLE BAR



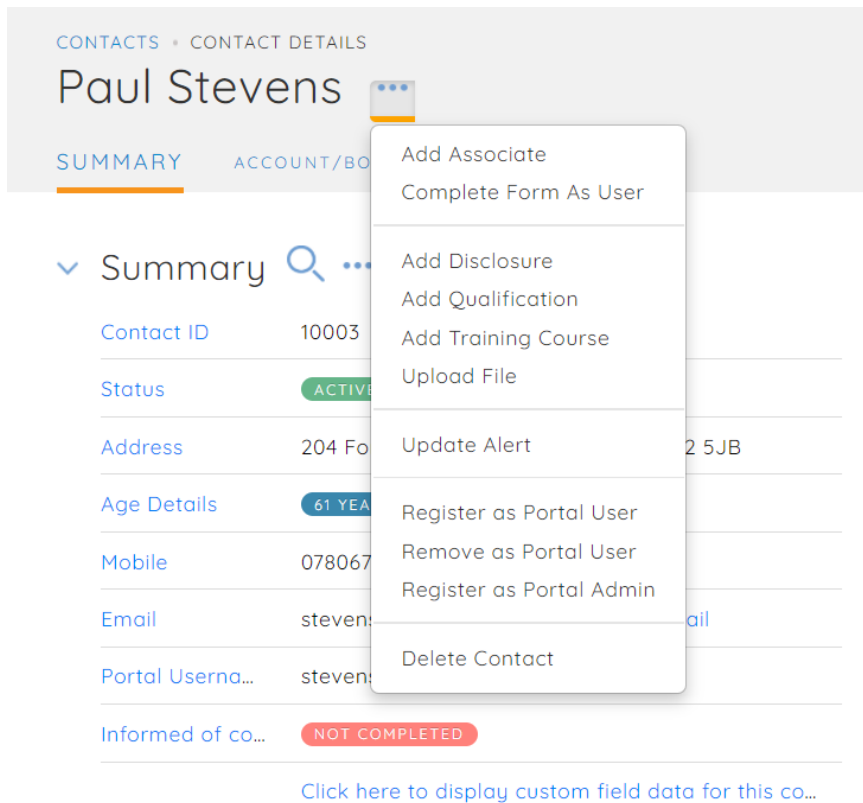
The PAGE TITLE BAR (grey) is displayed immediately below the page header containing the following:

<p>Page Title</p>	<p>This is the title of the currently displayed page, e.g., the title of the HOME PAGE is “WELCOME ....” where the dots represent your name.</p>
<p>Breadcrumb</p>	<p>The BREADCRUMB is displayed directly above the page title and provides you with details of what module you are using and will also provide you with a back link to go back to the last page you were displaying.</p> <p>PLEASE NOTE – We do not recommend using the browser back button to move back to the last displayed page and instead recommend using the breadcrumb.</p>

	<p>EXAMPLE – In the image above, the breadcrumb is made up of two labels. The CONTACTS link denotes that this page is part of the CONTACTS module – click on the link to display the CONTACTS menu options. The second label denotes the title of the displayed page – CONTACT DETAILS.</p>
<p>Page Icons</p>	<p>Many of the pages within the system have page icons displayed immediately to the right of the page title and to the left of the page menu icon. These provide links to commonly used functions, e.g., adding a new record, editing details, etc.</p> <p>PLUS SIGN ICON – This icon enables you to add a new record, e.g., clicking on this on the FIND A MEMBERSHIP SCHEME page displays the ADD A MEMBERSHIP SCHEME page.</p>
<p>Page Menu Icon</p>	<p>This icon is displayed to the right of the page title and consists of three horizontal dots.</p> <p>Click on the icon to display the page menu options.</p>
<p>Tab links</p>	<p>Some pages are split into tab pages and the tab links are displayed at the bottom of the page title area.</p>  <p>Click on a tab title to display that tab screen. The tab screen currently being displayed is denoted by an orange bar underneath the title, as in the example above where the SUMMARY tab is the currently displayed tab screen.</p>

<p>Page sections</p>	<p>Many of the pages in the system are split into sections, known as page sections.</p>   <p>A page section consists of a section title with a collapse/expand chevron icon display to the left of the title. Click on the chevron to collapse/expand the details in the section.</p> <p>Page sections can also contain a section menu – this is denoted where present by the three horizontal dots icon displayed to the right of the section title. Click on the section menu to display that section menu options.</p> <p>Page sections can also optionally display section icons, similar to the page icons described above. These appear to the right of the section title when present.</p>
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## PAGE MENU

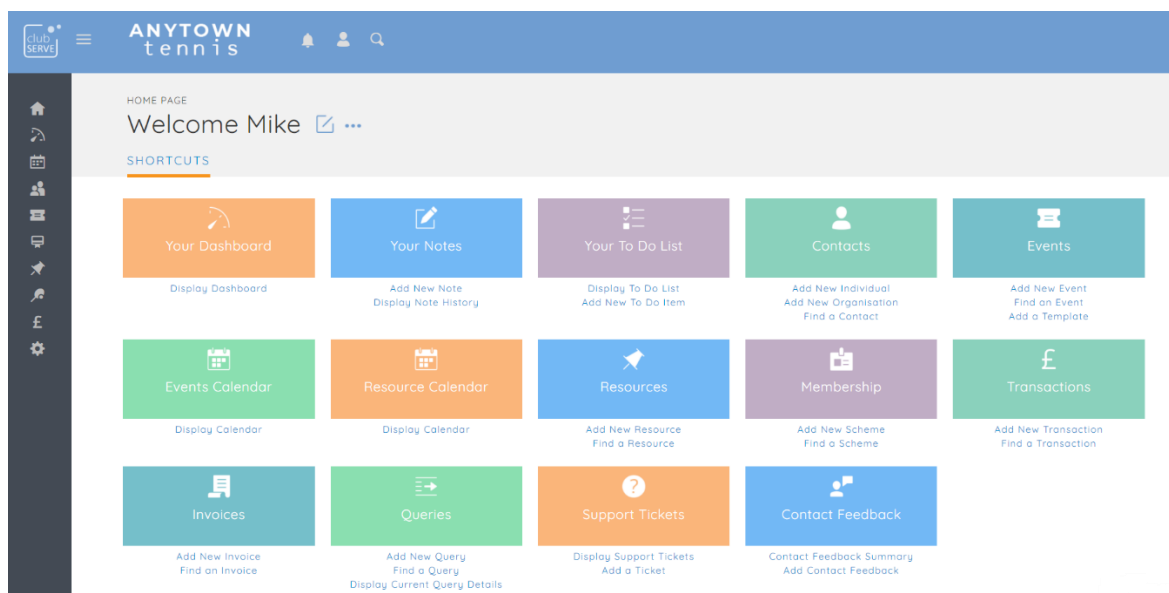


The PAGE MENU is a menu that is displayed when you click on the menu icon (three horizontal dots) displayed to the right of the page title.

Not all pages will display a page menu.

Page Sections can also include a menu, denoted by the same icon (three horizontal dots) displayed to the right of the section title.

## HOME PAGE



The HOME PAGE displays a list of system shortcuts as a series of coloured tiles and links.

You can customise what tiles are displayed and in what order by clicking on the page menu and selecting the **ADD/REMOVE/REORDER TILES** option.

## DISPLAYING THE PAGE

To display the HOME page:

- Click on the HOME menu option in the main menu – the system will then display the HOME page.

## PAGE OVERVIEW

The page consists of a series of coloured tiles, each of which is a shortcut to a module/option within the system.

Each tile consists of two sections:

- A coloured section that, when clicked, will either display another page or will display a module menu;
- A links section (directly below the coloured section) which contains relevant links.

## PAGE CONTENTS

The following modules/options can be displayed as tiles:

Club Affiliation	Click on the coloured section to display the CLUB AFFILIATION page.
Club Development Plan	Click on the coloured section to display the club's current club development plan.  If the club does not have a current plan, the system displays the ADD A PLAN page.
Club Reviews	Click on the coloured section to display the CLUB REVIEW CATEGORIES page.
Contacts	Click on the coloured section to display the CONTACTS menu.  Click on the links in the LINKS section to ADD NEW INDIVIDUAL, ADD NEW ORGANISATION, or to FIND A CONTACT.
Dashboard	Click on the coloured section or the link in the links section to display the DASHBOARD page
Document Library	Click on the coloured section to display the DOCUMENT LIBRARY page.
Events	Click on the coloured section to display the EVENTS menu.

	<p>Click on the links in the LINKS section to ADD NEW EVENT, FIND AN EVENT, or to ADD A TEMPLATE.</p>
Events Calendar	<p>Click on the coloured section to display the EVENTS CALENDAR page.</p>
Invoices	<p>Click on the coloured section to display the BOOKKEEPING menu.</p> <p>Click on the links in the LINKS section to ADD NEW INVOICE or to FIND AN INVOICE.</p>
Membership	<p>Click on the coloured section to display the MEMBERSHIP menu.</p> <p>Click on the links in the LINKS section to ADD NEW SCHEME or to FIND A SCHEME.</p>
Project Plans	<p>Click on the coloured section to display the PROJECT PLANS menu.</p> <p>Click on the links in the LINKS section to ADD NEW PROJECT PLAN or to FIND A PROJECT PLAN.</p>
Queries	<p>Click on the coloured section to display the CONTACTS menu.</p> <p>Click on the links in the LINKS section to ADD NEW QUERY, FIND A QUERY, or to DISPLAY CURRENT QUERY DETAILS.</p>
Resource Calendar	<p>Click on the coloured section to display the RESOURCES CALENDAR page.</p>

<p>Resources</p>	<p>Click on the coloured section to display the RESOURCES menu.</p> <p>Click on the links in the LINKS section to ADD NEW RESOURCE or to FIND A RESOURCE.</p>
<p>Resource Library</p>	<p>Click on the coloured section to display the RESOURCE LIBRARY page.</p>
<p>Transactions</p>	<p>Click on the coloured section to display the BOOKKEEPING menu.</p> <p>Click on the links in the LINKS section to ADD NEW TRANSATION or to FIND A TRANSACTION.</p>

## PAGE MENU OPTIONS

The PAGE MENU (click on the menu symbol to the right of the WELCOME... title) contains the following options:

<p>Add/Remove/Order Tiles</p>	<p>You can add/remove/reorder the tiles displayed on the home page by clicking this option – the system will then display the HOME PAGE SET UP page to enable you to do this.</p>
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# BOOKKEEPING

## INTRODUCTION

The bookkeeping module enables your organisation to;

- Manage the organisation's day to day bookkeeping;
- Record income (money in) and expense (money out) transactions;
- Categorise transactions;
- Produce account statements;
- Produce account summaries;
- Produce invoices and record payments against them;
- Produce end of year/interim reports.

## TERMINOLOGY USED

Account Type	<p>This is the term we use to describe somewhere money is paid into and out of, e.g., a bank account. Other types of account you may want to create and use on the system are:</p> <ul style="list-style-type: none"> <li>• Petty Cash</li> <li>• Deposit</li> <li>• Building Society</li> <li>• Sinking Fund</li> </ul>
Transaction Transaction Type	<p>This is the term we use to describe any movement of money, e.g., paying money in, paying money out, transferring between accounts, etc.</p> <p>There are four types of transaction (transaction type) you can add to the system:</p>

	<p>INCOME – money is being paid into an account;</p> <p>EXPENSE – money is being paid out of an account;</p> <p>INVOICE PAYMENT – money is being paid into an account for an outstanding invoice;</p> <p>TRANSFER – money is being transferred between accounts</p>
Forecast Transaction	<p>This is the term we use to describe a transaction that has not yet happened.</p> <p>A transaction is typically marked as a FORECAST transaction to enable your organisation to produce cashflow forecasts.</p>
Income	<p>This is the term we use to describe money being paid into an account.</p>
Expense	<p>This is the term we use to describe money being paid out of an account.</p>
Invoice	<p>This is the term we use to describe a document that details services provided and the cost of said services that is then due for payment.</p>
Income Category	<p>This is the term we use to describe a type of income, e.g., Subscriptions, Coaching Income, Bar Income, etc.</p> <p>You can link income transactions to one or more income categories, thereby enabling you to produce reports detailing</p>

	<p>the types of income received by your organisation.</p> <p>You can create an unlimited number of income categories.</p> <p>You can link two or more income categories together in a CATEGORY GROUP.</p> <p>You can link two or more income categories together in an ACCOUNTING DEPARTMENT.</p>
<p>Expense Category</p>	<p>This is the term we use to describe a type of expense, e.g., Salaries, Bar Expenses, Equipment, etc.</p> <p>You can link expense transactions to one or more expense categories, thereby enabling you to produce reports detailing the types of expense incurred by your organisation.</p> <p>You can create an unlimited number of expense categories.</p> <p>You can link two or more expense categories together in a CATEGORY GROUP.</p> <p>You can link two or more expense categories together in an ACCOUNTING DEPARTMENT.</p>
<p>Category Group</p>	<p>This is the term we use to describe two or more income/expense categories.</p> <p>You would typically create a Category Group for similar types of categories, e.g., you create a Category Group called COACHING INCOME and link to it the following income categories:</p> <ul style="list-style-type: none"> <li>• Adult Group Coaching</li> </ul>

	<ul style="list-style-type: none"> <li>• Junior Group Coaching</li> <li>• Adult Individual Coaching</li> <li>• Junior Individual Coaching</li> <li>• Squad Coaching</li> </ul> <p>A category group can only contain either income categories or expense categories.</p> <p>You can create an unlimited number of category groups.</p>
<p>Accounting Department</p>	<p>This is the term we use to describe a collection of any of the following:</p> <ul style="list-style-type: none"> <li>• Income category</li> <li>• Expense category</li> <li>• Category Group</li> </ul> <p>You would typically create an Accounting Department to enable you to analyse the profitability/sustainability of a sector of your organisation’s finances, e.g., you create an Accounting Department called Coaching and include the following categories:</p> <ul style="list-style-type: none"> <li>• Coaching Income</li> <li>• Coaching Expenses</li> </ul> <p>You could then run a report on the department and report on the profitability of coaching in your organisation.</p> <p>You can create an unlimited number of Accounting Departments.</p>
<p>Payment Methods</p>	<p>This is the term we use to describe the ways in which money can be paid into the</p>

	organisation, e.g., cash, cheque, bank transfer, etc.
GoCardless	This is a payment provider which will enable you to take recurring or one-off payments via direct debit, so the customer does not need to enter their card details for every transaction.
Direct Debit Mandate	When a customer elects to pay via GoCardless, they will need to setup a mandate. They will be redirected to a GoCardless page and prompted to enter their bank account details. The system will then tie up the mandate with the payment. When a customer has an existing mandate, they can make further payments via Direct Debit.
Access Token/Secret	This is usually a random alphanumeric code that you will be required to enter on the system to be able to connect to a third-party provider (such as GoCardless).
Sandbox Account	Many third-party providers enable you to setup a test account to enable system testing before you go live with actual payments.

## GETTING STARTED

<b><i>What you do</i></b>	<b><i>Where you do it</i></b>
You record on the system your organisation's financial	Click on SYSTEM SETTINGS / YOUR ORGANISATION

settings, e.g., accounting method, year-end date, VAT registered.	SETTINGS and then click on the FINANCE section.
You set up your account types (bank account, cash account, etc.)	Click on BOOKKEEPING / ACCOUNT TYPES.
You set up your income and expense categories.	Click on BOOKKEEPING / INCOME CATEGORIES and EXPENSE CATEGORIES.
You set up your payment methods.	Click on BOOKKEEPING / PAYMENT METHODS.
You set up your VAT codes (only needed if your organisation is VAT registered).	Click on BOOKKEEPING / VAT CODES.
You record money in (income) and money out (expense), linking the transactions to income and expense categories.	Click on BOOKKEEPING / ADD A TRANSACTION.
You run the ACCOUNT STATEMENT report to report on the balances in your accounts.	Click on BOOKKEEPING / ACCOUNT STATEMENT.
You run the ANALYSIS reports to detail how money has been earned and spent.	Click on BOOKKEEPING / CATEGORY ANALYSIS.

<p>You run the INCOME AND EXPENDITURE STATEMENT to produce management and end of year statements.</p>	<p>Click on BOOKKEEPING / INCOME AND EXPENDITURE STATEMENT.</p>
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## ADD A TRANSACTION PAGE

This page is used to add a new transaction to the system.

### DISPLAYING THE PAGE

To display this page:

- Click on the BOOKKEEPING option in the main menu - the system will then display the BOOKKEEPING menu;
- Click on the ADD A TRANSACTION option – the system will then display the ADD A TRANSACTION page.

### PAGE OVERVIEW

You are prompted to select the type of transaction you want to add from the following options:

- Income
- Invoice payment
- Expense
- Transfer

Click on the required type – the system will then display the required fields for the selected type.

Enter the details as required and click on the SAVE AS NEW TRANSACTION button. The system will then display the unique transaction ID allocated to your transaction – you can record this on any relevant paperwork, such as an expense receipt.

### PAGE CONTENTS

The displayed fields are detailed below by transaction type.

#### INCOME TRANSACTION

Select this type of transaction when you want to record money being paid into an account type.

Transaction Date	Enter the date of the transaction (tax date).
Description	Enter a brief description of the income.
Into Account	Select which account the money is paid into.
Method	Select the method in which the money was paid into the selected account.
Category	Select the income category you want to link the income to.  Click on the PLUS icon if you want to add a new income category.
Your Reference	Enter any reference details you want to use for the transaction, e.g., cheque number.
Amount	Enter the amount of the transaction.  If your organisation has confirmed that it is registered for VAT, the relevant VAT amount/rate fields will also be displayed.
Paid By	Enter the name of the contact from whom the income was received, if relevant.
This is a forecast transaction	Tick this field if you want to record the transaction as a FORECAST transaction.

	<p>If ticked, the system prompts you to enter if you want to repeat the transaction over a period of months. This is typically used when you want to record a forecast over a period of months for cashflow forecasting purposes.</p>
<p>SAVE AS NEW TRANSACTION button</p>	<p>Click the button once you have completed the required fields.</p> <p>The system will save the transaction and display the transaction ID for your new transaction. You can use this to document any associated paperwork and thereby link the documentation to the system transaction.</p>
<p>SAVE AND ADD ANOTHER button</p>	<p>Click this button if you want to add another new transaction after the system has saved the transaction details.</p> <p>The system will save the transaction and display the transaction ID for your new transaction. You can use this to document any associated paperwork and thereby link the documentation to the system transaction.</p> <p>The system will then prompt you to add another transaction.</p>

**EXPENSE TRANSACTION**

Select this type of transaction when you want to record money being paid out of an account type.

<p>Transaction Date</p>	<p>Enter the date of the transaction (tax date).</p>
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Description	Enter a brief description of the expense.
From Account	Select which account the money is being paid out of.
Method	Select the method in which the money was paid out of the selected account.
Category	Select the expense category you want to link the expense to.  Click on the PLUS icon if you want to add a new expense category.
Your Reference	Enter any reference details you want to use for the transaction, e.g., cheque number.
Amount	Enter the amount of the transaction.  If your organisation has confirmed that it is registered for VAT, the relevant VAT amount/rate fields will also be displayed.
This is a forecast transaction	Tick this field if you want to record the transaction as a FORECAST transaction.  If ticked, the system prompts you to enter if you want to repeat the transaction over a period of months. This is typically used when you want to record a forecast over a period of months for cashflow forecasting purposes.

<p>SAVE AS NEW TRANSACTION button</p>	<p>Click the button once you have completed the required fields.</p> <p>The system will save the transaction and display the transaction ID for your new transaction. You can use this to document any associated paperwork and thereby link the documentation to the system transaction.</p>
<p>SAVE AND ADD ANOTHER button</p>	<p>Click this button if you want to add another new transaction after the system has saved the transaction details.</p> <p>The system will save the transaction and display the transaction ID for your new transaction. You can use this to document any associated paperwork and thereby link the documentation to the system transaction.</p> <p>The system will then prompt you to add another transaction.</p>

**INVOICE PAYMENT**

Select this type of transaction when you want to record a payment that a contact has made for an invoice that was issued on the system.

You are prompted to select the contact that is making the payment as soon as you select the transaction type. You are then prompted to select the invoices that will be linked to the payment.

<p>Payment made by</p>	<p>The system prompts you to select which contact is making the payment.</p>
<p>Select Invoice for Payment</p>	<p>The system prompts you to select which of the contact's invoices with outstanding balances you are receiving payment for.</p>

	<p>Click on the invoice you want to record payment for – the system will then display the payment amount prompt for the invoice and default in the outstanding balance for the chosen invoice.</p> <p>Click on ADD PAYMENT to add the payment details to the transaction.</p>
Transaction Date	Enter the date of the transaction (tax date).
Description	Enter a brief description of the transaction – the system will default in a description by default.
Into Account	Select which account the money is being paid into.
Method	Select the method in which the money was paid into the selected account.
Your Reference	Enter any reference details you want to use for the transaction, e.g., cheque number.
Payment Amount	<p>The system displays the total payment of invoices that you have selected for payment.</p> <p>You cannot amend this field directly. If you wish to amend a payment amount, select the relevant invoice from the list of invoices in the INVOICES LINKED TO THIS PAYMENT table (by clicking on the invoice title/amount) – the system will</p>

	<p>then display the UPDATE PAYMENT DETAILS screen on which you can then amend the payment amount.</p>
<p>Paid by</p>	<p>The system displays the contact details of the contact you selected on the PAYMENT MADE BY screen.</p>
<p>Invoices linked to this payment</p>	<p>The system displays a list of the invoices you have selected for payment in this field.</p> <p>You can amend the amount being paid by clicking on the DESCRIPTION field of the required invoice.</p> <p>Click on the PLUS icon displayed to the right of the INVOICES LINKED TO THIS PAYMENT title to add another payment to the current transaction.</p>
<p>SAVE AS NEW TRANSACTION button</p>	<p>Click the button once you have completed the required fields.</p> <p>The system will check that the amount entered for payment and the amount(s) allocated against the invoices to be paid match. If they do not, you are prompted to amend the details until they do.</p> <p>The system will save the transaction and display the transaction ID for your new transaction. You can use this to document any associated paperwork and thereby link the documentation to the system transaction.</p>
<p>SAVE AND ADD ANOTHER button</p>	<p>Click this button if you want to add another new transaction after the</p>

	<p>system has saved the transaction details.</p> <p>The system will check that the amount entered for payment and the amount(s) allocated against the invoices to be paid match. If they do not, you are prompted to amend the details until they do.</p> <p>The system will save the transaction and display the transaction ID for your new transaction. You can use this to document any associated paperwork and thereby link the documentation to the system transaction.</p> <p>The system will then prompt you to add another transaction.</p>
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**TRANSFER TRANSACTION**

Select this type of transaction when you want to record money being transferred from one account type to another account type.

Transaction Date	Enter the date of the transaction (tax date).
Description	Enter a brief description of the income.
Into Account	Select which account the money is paid into.
Method	Select the method in which the money was paid into the selected account.



Category	<p>Select the income category you want to link the income to.</p> <p>Click on the PLUS icon if you want to add a new income category.</p>
Your Reference	<p>Enter any reference details you want to use for the transaction, e.g., cheque number.</p>
Amount	<p>Enter the amount of the transaction.</p> <p>If your organisation has confirmed that it is registered for VAT, the relevant VAT amount/rate fields will also be displayed.</p>
Paid By	<p>Enter the name of the contact from whom the income was received, if relevant.</p>
This is a forecast transaction	<p>Tick this field if you want to record the transaction as a FORECAST transaction.</p> <p>If ticked, the system prompts you to enter if you want to repeat the transaction over a period of months. This is typically used when you want to record a forecast over a period of months for cashflow forecasting purposes.</p>
SAVE AS NEW TRANSACTION button	<p>Click the button once you have completed the required fields.</p> <p>The system will save the transaction and display the transaction ID for your new transaction. You can use this to document any associated paperwork</p>

	<p>and thereby link the documentation to the system transaction.</p>
<p>SAVE AND ADD ANOTHER button</p>	<p>Click this button if you want to add another new transaction after the system has saved the transaction details.</p> <p>The system will save the transaction and display the transaction ID for your new transaction. You can use this to document any associated paperwork and thereby link the documentation to the system transaction.</p> <p>The system will then prompt you to add another transaction.</p>

## FIND A TRANSACTION

This page is used to find an existing transaction on the system. Once found, the transaction can be viewed, amended or deleted.

### DISPLAYING THE PAGE

To display this page:

- Click on the BOOKKEEPING option in the main menu - the system will then display the BOOKKEEPING menu;
- Click on the FIND A TRANSACTION option – the system will then display the FIND A TRANSACTION page.

### PAGE OVERVIEW

Description

### PAGE CONTENTS

field name	field description
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If a field has a number of options, give the field its own table below the main table and list the options, one per row.

Any terminology used should go in the section TERMINOLOGY USED table.

## INCOME CATEGORIES PAGE

This page is used to add, edit and delete income categories.

### DISPLAYING THE PAGE

To display this page:

- Click on the BOOKKEEPING option in the main menu – the system will then display the BOOKKEEPING menu;
- Click on the INCOME CATEGORIES option – the system will then display the INCOME CATEGORIES page.

### PAGE OVERVIEW

The page displays a list of the current income categories.

### PAGE CONTENTS

<p>Income Category list</p>	<p>Click on an existing category to edit/delete the details – the system will then display the EDIT INCOME CATEGORY DETAILS page to enable you to edit/delete the selected category details.</p> <p>Click on the PLUS icon in the page header to add a new income category – the system will then display the ADD NEW INCOME CATEGORY page to enable you to add a new category.</p>
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## ADD A NEW INVOICE

This page is used to add a new invoice.

### DISPLAYING THE PAGE

To display this page:

- Click on the BOOKKEEPING option in the main menu - the system will then display the BOOKKEEPING menu;
- Click on the ADD NEW INVOICE option – the system will then display the ADD NEW INVOICE page.

### PAGE OVERVIEW

The page consists of three sections – the INVOICE DETAILS section, the ITEMS section, and the MESSAGES section.

Complete the details as required and click on the ADD NEW INVOICE button. The system will then save the new invoice details.

### PAGE CONTENTS

#### INVOICE DETAILS SECTION

Invoice Date	Enter the invoice (tax) date.
Description	Enter a brief description of the invoice.
Your Reference	Enter your reference for this invoice if required.
Issued To	Click on the magnifying glass icon to select the contact to whom you are issuing the invoice to.

**ITEMS SECTION**

<p>Items list</p>	<p>The system displays a list of the invoice items.</p> <p>Click on the PLUS icon in the section header to add a new item to the invoice – the system then displays the ADD NEW INVOICE ITEM page.</p> <p>Click on an existing item to edit/delete the selected item details.</p>
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**MESSAGES SECTION**

<p>Payment Area Message</p>	<p>Enter any message that you want to appear in the payment area of the invoice.</p>
<p>Remittance Slip Message</p>	<p>Enter any message that you want to appear in the remittance slip area of the invoice.</p>

**PAGE MENU**

<p>Print Invoice</p>	<p>Select this option to display the invoice in a separate tab window. You can then click on the PRINT button to print the invoice. You can also save the invoice as a PDF.</p>
<p>Delete Invoice</p>	<p>Select this option to delete the invoice.</p>

## ADD NEW INVOICE ITEM PAGE

This page is used to add, update and delete invoice items from an invoice.

### DISPLAYING THE PAGE

To display this page:

- Click on the BOOKKEEPING option in the main menu - the system will then display the BOOKKEEPING menu;
- Click on the ADD NEW INVOICE option – the system will then display the ADD NEW INVOICE page;
- Click on the PLUS icon in the ITEMS section header – the system will then display the ADD ITEM TO INVOICE page.

### PAGE OVERVIEW

The page consists of a set of fields prompting you for details of the item you are adding to the invoice.

Enter the details as prompted and click on the ADD ITEM TO INVOICE button. The system will then add the item details to the invoice and redisplay the ADD NEW INVOICE page.

### PAGE CONTENTS

Quantity	Enter the quantity required.
Description	Enter the description of the item.
Category	Select the INCOME CATEGORY to assign to the item. You can add an income category by clicking on the PLUS icon to the right of the CATEGORY field title.

Amount	<p>Enter the amount of the item.</p> <p>If your organisation has confirmed on the system that it is VAT registered, the system displays the VAT rate, VAT amount, and net amount fields.</p>
Total Cost	<p>This field displays the total cost for the item – the AMOUNT multiplied by the QUANTITY.</p>
ADD ITEM TO INVOICE button	<p>Click the button to add the item details to the invoice – the system will then redisplay the ADD NEW INVOICE ITEM page.</p>



## FIND AN INVOICE PAGE

This page is used to find an existing invoice on the system.

### DISPLAYING THE PAGE

To display this page:

- Click on the BOOKKEEPING option in the main menu - the system will then display the BOOKKEEPING menu;
- Click on the FIND AN INVOICE option – the system will then display the FIND AN INVOICE page.

### PAGE OVERVIEW

The page consists of two tab pages – the SEARCH CRITERIA page and the RESULTS page.

Use the SEARCH CRITERIA page to filter and find the required invoices by entering the filter information in the fields and then clicking on the SEARCH FOR INVOICES button – the system will then display the matching invoices on the RESULTS tab page.

### PAGE CONTENTS

#### SEARCH CRITERIA TAB PAGE FIELDS

Invoice Number	Enter the invoice number you are searching for.
Title	Enter the title (or part of the title) of the invoice you are looking for.
For Period	Select the required period you want to display invoices for OR manually enter the required FROM and TO date range in the ISSUED BETWEEN... fields.

<p>Issued Between... date range</p>	<p>Enter the required FROM and TO date range in the ISSUED BETWEEN... fields.</p>
<p>For Contact</p>	<p>Enter the name (or part of the name) of the contact you want to find invoices for.</p>
<p>Display unpaid invoices only</p>	<p>Tick this field if you only want to find unpaid invoices.</p>
<p>SEARCH FOR INVOICES button</p>	<p>Click this button to search for invoices using the criteria you have entered – the system will then display any matching invoices on the RESULTS tab page.</p>

**RESULTS TAB PAGE FIELDS**

<p>Matching invoices list</p>	<p>A list of the matching invoices is displayed on this tab page.</p> <p>Click on an invoice title/invoice number to open a displayed invoice – the system will then display the details of the selected invoice on the EDIT INVOICE DETAILS page.</p>
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## ACCOUNT STATEMENT PAGE

This page is used to display a list of transactions for a given account type and period.

The statement is similar to the bank statements you get from your bank for your organisation's bank account and enable you to reconcile your ClubServe transactions with the bank statement.

### DISPLAYING THE PAGE

To display this page:

- Click on the BOOKKEEPING option in the main menu - the system will then display the BOOKKEEPING menu;
- Click on the ACCOUNT STATEMENT option – the system will then display the ACCOUNT STATEMENT page.

### PAGE OVERVIEW

The page consists of two tab pages – the SEARCH CRITERIA page and the RESULTS page.

Use the SEARCH CRITERIA page to filter and find the required transactions by entering the filter information in the fields and then clicking on the DISPLAY STATEMENT ACCOUNT button – the system will then display the matching transactions on the RESULTS tab page.


### PAGE CONTENTS

#### SEARCH CRITERIA TAB PAGE FIELDS

For Account	Select the account type you want to display transactions for – this is a MANDATORY field.
Display Columns	Select the columns you want to display on the RESULTS tab page.

For Period	Select the required period you want to display transactions for OR manually enter the required FROM and TO date range in the FOR DATE RANGE fields.
For Date Range	Enter the required FROM and TO date range.
For Amount Range	Enter the amount range you want to use to filter the transactions by.
Forecast Transactions	Select whether you want to include forecast transactions in the results.
DISPLAY ACCOUNT STATEMENT button	Click this button to display the matching transactions on the RESULTS tab page.

**RESULTS TAB PAGE FIELDS**

Transaction list	<p>The system lists all transactions that match the criteria you entered on the SEARCH CRITERIA tab page.</p> <p>Click on a transaction description to open the details of the selected transaction on the EDIT TRANSACTION DETAILS page.</p>
<p>REPORT icon</p> 	<p>Click on the REPORT/PRINT icon to the right of the section header to display the statement in a separate tab window.</p> <p>The generated report can be printed or exported to a number of different</p>

	<p>formats by using the buttons at the top of the report page.</p>
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## CATEGORY ANALYSIS PAGE

This page is used to display a list of transactions by their income/expense categories for a given period.

### DISPLAYING THE PAGE

To display this page:

- Click on the BOOKKEEPING option in the main menu - the system will then display the BOOKKEEPING menu;
- Click on the CATEGORY ANALYSIS option – the system will then display the CATEGORY ANALYSIS page.

### PAGE OVERVIEW

The page consists of two tab pages – the SEARCH CRITERIA page and the RESULTS page.

Use the SEARCH CRITERIA page to filter and find the required transactions by entering the filter information in the fields and then clicking on the DISPLAY CATEGORY BREAKDOWN button – the system will then display the matching transactions on the RESULTS tab page.

### PAGE CONTENTS


#### SEARCH CRITERIA TAB PAGE FIELDS

For Transaction Type	Select INCOME or EXPENSE – the system will then display the available categories for the selected category type in the FOR CATEGORY field.
For Category	You can select a specific category to report on or you can leave the field set to ALL to include all categories for your chosen transaction type.

For Account	Select the account type you want to display transactions for.
For Item Type	Select which transaction item type you want to display.
Display Columns	Select the columns you want to display on the RESULTS tab page.
For Period	Select the required period you want to display transactions for OR manually enter the required FROM and TO date range in the FOR DATE RANGE fields.
For Date Range	Enter the required FROM and TO date range.
Forecast Transactions	Select whether you want to include forecast transactions in the results.
DISPLAY CATEGORY BREAKDOWN button	Click this button to display the matching transactions on the RESULTS tab page.

**RESULTS TAB PAGE FIELDS**

Transaction list	<p>The system lists all transactions that match the criteria you entered on the SEARCH CRITERIA tab page.</p> <p>Click on a transaction description to open the details of the selected</p>
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	<p>transaction on the EDIT TRANSACTION DETAILS page.</p>
<p>REPORT icon</p> 	<p>Click on the REPORT/PRINT icon to the right of the section header to display the statement in a separate tab window.</p> <p>The generated report can be printed or exported to a number of different formats by using the buttons at the top of the report page.</p>



## CATEGORY GROUP ANALYSIS PAGE

This page is used to display a list of transactions by their category group for a given period.

### DISPLAYING THE PAGE

To display this page:

- Click on the BOOKKEEPING option in the main menu - the system will then display the BOOKKEEPING menu;
- Click on the CATEGORY GROUP ANALYSIS option – the system will then display the CATEGORY GROUP ANALYSIS page.

### PAGE OVERVIEW

The page consists of two tab pages – the SEARCH CRITERIA page and the RESULTS page.

Use the SEARCH CRITERIA page to filter and find the required transactions by entering the filter information in the fields and then clicking on the DISPLAY CATEGORY BREAKDOWN button – the system will then display the matching transactions on the RESULTS tab page.


### PAGE CONTENTS

#### SEARCH CRITERIA TAB PAGE FIELDS

For Category Group	Select the CATEGORY GROUP you want to display transactions for.
For Account	Select the account type you want to display transactions for.
For Item Type	Select which transaction item type you want to display.

Display Columns	Select the columns you want to display on the RESULTS tab page.
For Period	Select the required period you want to display transactions for OR manually enter the required FROM and TO date range in the FOR DATE RANGE fields.
For Date Range	Enter the required FROM and TO date range.
Forecast Transactions	Select whether you want to include forecast transactions in the results.
DISPLAY CATEGORY BREAKDOWN button	Click this button to display the matching transactions on the RESULTS tab page.

**RESULTS TAB PAGE FIELDS**

Transaction list	<p>The system lists all transactions that match the criteria you entered on the SEARCH CRITERIA tab page.</p> <p>Click on a transaction description to open the details of the selected transaction on the EDIT TRANSACTION DETAILS page.</p>
<p>REPORT icon</p> 	Click on the REPORT/PRINT icon to the right of the section header to display the statement in a separate tab window.

	<p>The generated report can be printed or exported to a number of different formats by using the buttons at the top of the report page.</p>
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## DEBTOR ANALYSIS PAGE

This page is used to display a list of outstanding invoices.

### DISPLAYING THE PAGE

To display this page:

- Click on the BOOKKEEPING option in the main menu - the system will then display the BOOKKEEPING menu;
- Click on the CATEGORY GROUP DETAIL option – the system will then display the CATEGORY GROUP DETAIL page.

### PAGE OVERVIEW

The page consists of two tab pages – the SEARCH CRITERIA page and the RESULTS page.

Use the SEARCH CRITERIA page to filter and find the required invoices by entering the filter information in the fields and then clicking on the SEARCH FOR INVOICES button – the system will then display the matching invoices on the RESULTS tab page.


### PAGE CONTENTS

#### SEARCH CRITERIA TAB PAGE FIELDS

For Contact	Enter the name of the contact you want to display invoices for. Leave blank to include all contacts.
Unpaid for more than...	Enter the number of days that an invoice has been unpaid for – the system will use this to only display invoices that are unpaid for more than the specified number of days.  The default value is 30 days.

<p>SEARCH FOR INVOICES button</p>	<p>Click this button to display the matching invoices on the RESULTS tab page.</p>
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**RESULTS TAB PAGE FIELDS**

<p>Invoice list</p>	<p>The system lists all invoices that match the criteria you entered on the SEARCH CRITERIA tab page.</p> <p>Click on an invoice title to open the details of the selected invoice on the EDIT INVOICE DETAILS page.</p>
<p>REPORT icon</p> 	<p>Click on the REPORT/PRINT icon to the right of the section header to display the invoice in a separate tab window.</p> <p>The generated report can be printed or exported to a number of different formats by using the buttons at the top of the report page.</p>

## DEPARTMENT ANALYSIS PAGE

This page is used to display a list of transactions by their accounting department for a given period.

### DISPLAYING THE PAGE

To display this page:

- Click on the BOOKKEEPING option in the main menu - the system will then display the BOOKKEEPING menu;
- Click on the DEPARTMENT ANALYSIS option – the system will then display the DEPARTMENT ANALYSIS page.

### PAGE OVERVIEW

The page consists of two tab pages – the SEARCH CRITERIA page and the RESULTS page.

Use the SEARCH CRITERIA page to filter and find the required transactions by entering the filter information in the fields and then clicking on the DISPLAY CATEGORY BREAKDOWN button – the system will then display the matching transactions on the RESULTS tab page.


### PAGE CONTENTS

#### SEARCH CRITERIA TAB PAGE FIELDS

For Acct Department	Select the ACCOUNTING DEPARTMENT you want to display transactions for.
For Account	Select the account type you want to display transactions for.
For Item Type	Select which transaction item type you want to display.

Display Columns	Select the columns you want to display on the RESULTS tab page.
For Period	Select the required period you want to display transactions for OR manually enter the required FROM and TO date range in the FOR DATE RANGE fields.
For Date Range	Enter the required FROM and TO date range.
Forecast Transactions	Select whether you want to include forecast transactions in the results.
DISPLAY CATEGORY BREAKDOWN button	Click this button to display the matching transactions on the RESULTS tab page.

**RESULTS TAB PAGE FIELDS**

Transaction list	<p>The system lists all transactions that match the criteria you entered on the SEARCH CRITERIA tab page.</p> <p>Click on a transaction description to open the details of the selected transaction on the EDIT TRANSACTION DETAILS page.</p>
<p>REPORT icon</p> 	Click on the REPORT/PRINT icon to the right of the section header to display the statement in a separate tab window.

	<p>The generated report can be printed or exported to a number of different formats by using the buttons at the top of the report page.</p>
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## INCOME AND EXPENDITURE STATEMENT PAGE

This page is used to display an income and expenditure statement for a given period. Please note that this page is only available to organisations who have indicated to the system that they are NOT FOR PROFIT.

### DISPLAYING THE PAGE

To display this page:

- Click on the BOOKKEEPING option in the main menu - the system will then display the BOOKKEEPING menu;
- Click on the INCOME AND EXPENDITURE STATEMENT option – the system will then display the INCOME AND EXPENDITURE STATEMENT page.

### PAGE OVERVIEW

The page consists of two tab pages – the SEARCH CRITERIA page and the RESULTS page.

Use the SEARCH CRITERIA page to filter and find the required data by entering the filter information in the fields and then clicking on the CALCULATE AND DISPLAY BREAKDOWN button – the system will then display the matching transactions on the RESULTS tab page.

### PAGE CONTENTS


#### SEARCH CRITERIA TAB PAGE FIELDS

For Period	Select the required period you want to display data for OR manually enter the required FROM and TO date range in the FOR DATE RANGE fields.
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For Date Range	Enter the required FROM and TO date range.
Sort By	<p>Select the order in which you want to display the category information:</p> <ul style="list-style-type: none"> <li>• AMOUNT (DESCENDING) – Displays the categories in their descending order of total for the period;</li> <li>• ALPHABETICAL ORDER – displays the categories in alphabetical order.</li> </ul>
Display Previous Period Details	Tick this field if you want to display the previous period's data beside the required period's data. If selected, the system also displays the amount and percentage differences between the two periods.
Forecast Transactions	Select whether you want to include forecast transactions in the results.
CALCULATE AND DISPLAY STATEMENT button	Click this button to display the data for the chosen period on the RESULTS tab page.

**RESULTS TAB PAGE FIELDS**

Category list	The system displays the income and expenditure category details for the required period and also displays the surplus/deficit details for the period.
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	<p>Click on a category description to open the details of the selected category/category group.</p>
<p>REPORT icon</p> 	<p>Click on the REPORT/PRINT icon to the right of the section header to display the statement in a separate tab window.</p> <p>The generated report can be printed or exported to a number of different formats by using the buttons at the top of the report page.</p>

## PROFIT AND LOSS STATEMENT PAGE

This page is used to display a profit and loss statement for a given period. Please note that this page is only available to organisations who have not indicated to the system that they are NOT FOR PROFIT.

### DISPLAYING THE PAGE

To display this page:

- Click on the BOOKKEEPING option in the main menu - the system will then display the BOOKKEEPING menu;
- Click on the PROFIT AND LOSS STATEMENT option – the system will then display the PROFIT AND LOSS STATEMENT page.

### PAGE OVERVIEW

The page consists of two tab pages – the SEARCH CRITERIA page and the RESULTS page.

Use the SEARCH CRITERIA page to filter and find the required data by entering the filter information in the fields and then clicking on the CALCULATE AND DISPLAY BREAKDOWN button – the system will then display the matching transactions on the RESULTS tab page.

### PAGE CONTENTS


#### SEARCH CRITERIA TAB PAGE FIELDS

For Period	Select the required period you want to display data for OR manually enter the required FROM and TO date range in the FOR DATE RANGE fields.
For Date Range	Enter the required FROM and TO date range.

<p>Sort By</p>	<p>Select the order in which you want to display the category information:</p> <ul style="list-style-type: none"> <li>• AMOUNT (DESCENDING) – Displays the categories in their descending order of total for the period;</li> <li>• ALPHABETICAL ORDER – displays the categories in alphabetical order.</li> </ul>
<p>Display Previous Period Details</p>	<p>Tick this field if you want to display the previous period’s data beside the required period’s data. If selected, the system also displays the amount and percentage differences between the two periods.</p>
<p>Forecast Transactions</p>	<p>Select whether you want to include forecast transactions in the results.</p>
<p>CALCULATE AND DISPLAY STATEMENT button</p>	<p>Click this button to display the data for the chosen period on the RESULTS tab page.</p>

**RESULTS TAB PAGE FIELDS**

<p>Category list</p>	<p>The system displays the profit and loss category details for the required period and also displays the net/gross profit details for the period.</p> <p>Click on a category description to open the details of the selected category/category group.</p>
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<p>REPORT icon</p> 	<p>Click on the REPORT/PRINT icon to the right of the section header to display the statement in a separate tab window.</p> <p>The generated report can be printed or exported to a number of different formats by using the buttons at the top of the report page.</p>
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## INCOME ANALYSIS PAGE

This page is used to display a list of income for a given period.

### DISPLAYING THE PAGE

To display this page:

- Click on the BOOKKEEPING option in the main menu - the system will then display the BOOKKEEPING menu;
- Click on the INCOME ANALYSIS option – the system will then display the INCOME ANALYSIS page.

### PAGE OVERVIEW

The page consists of two tab pages – the SEARCH CRITERIA page and the RESULTS page.

Use the SEARCH CRITERIA page to filter and find the required data by entering the filter information in the fields and then clicking on the CALCULATE AND DISPLAY BREAKDOWN button – the system will then display the matching transactions on the RESULTS tab page.


### PAGE CONTENTS

#### SEARCH CRITERIA TAB PAGE FIELDS

For Period	Select the required period you want to display data for OR manually enter the required FROM and TO date range in the FOR DATE RANGE fields.
For Date Range	Enter the required FROM and TO date range.
Forecast Transactions	Select whether you want to include forecast transactions in the results.

<p>For Income Category/Code</p>	<p>Select the required income category.</p>
<p>DISPLAY INCOME ANALYSIS button</p>	<p>Click this button to display the data for the chosen period on the RESULTS tab page.</p>

**RESULTS TAB PAGE FIELDS**

<p>Category list</p>	<p>The system displays the income details for the required period by income category/code.</p> <p>Click on a category description to view the details of the selected category.</p> <p>Click on a transaction/invoice item to view the details.</p>
<p>REPORT icon</p> 	<p>Click on the REPORT/PRINT icon to the right of the section header to display the analysis in a separate tab window.</p> <p>The generated report can be printed or exported to a number of different formats by using the buttons at the top of the report page.</p>



## VIRTUAL WALLET SPEND ANALYSIS PAGE

This page is used to display a list of the spend by customers/members from their virtual wallet for a given period.

### DISPLAYING THE PAGE

To display this page:

- Click on the BOOKKEEPING option in the main menu - the system will then display the BOOKKEEPING menu;
- Click on the VIRTUAL WALLET SPEND ANALYSIS option – the system will then display the VIRTUAL WALLET SPEND ANALYSIS page.

### PAGE OVERVIEW

The page consists of two tab pages – the SEARCH CRITERIA page and the RESULTS page.

Use the SEARCH CRITERIA page to filter and find the required data by entering the filter information in the fields and then clicking on the DISPLAY SPEND ANALYSIS button – the system will then display the matching transactions on the RESULTS tab page.


### PAGE CONTENTS

#### SEARCH CRITERIA TAB PAGE FIELDS

For Period	Select the required period you want to display data for OR manually enter the required FROM and TO date range in the FOR DATE RANGE fields.
For Date Range	Enter the required FROM and TO date range.

Forecast Transactions	Select whether you want to include forecast transactions in the results.
For Income Category/Code	Select the required income category.
DISPLAY SPEND ANALYSIS button	Click this button to display the data for the chosen period on the RESULTS tab page.

**RESULTS TAB PAGE FIELDS**

Category list	<p>The system displays the spend details for the required period by income category/code.</p> <p>Click on a category description to view the details of the selected category.</p> <p>Click on a transaction/invoice item to view the details.</p>
<p>REPORT icon</p> 	<p>Click on the REPORT/PRINT icon to the right of the section header to display the analysis in a separate tab window.</p> <p>The generated report can be printed or exported to a number of different formats by using the buttons at the top of the report page.</p>

## SCHEDULED PAYMENT ANALYSIS PAGE

This page is used to display a list of the scheduled payments that are overdue by more than 7 days.

### DISPLAYING THE PAGE

To display this page:

- Click on the BOOKKEEPING option in the main menu - the system will then display the BOOKKEEPING menu;
- Click on the SCHEDULED PAYMENT ANALYSIS option – the system will then display the SCHEDULED PAYMENT ANALYSIS page.

### PAGE OVERVIEW

The page consists of two tab pages – the SEARCH CRITERIA page and the RESULTS page.


Use the SEARCH CRITERIA page to filter and find the required data by entering the filter information in the fields and then clicking on the SEARCH FOR INVOICES button – the system will then display the matching payments on the RESULTS tab page.

### PAGE CONTENTS

#### SEARCH CRITERIA TAB PAGE FIELDS

For Contact	Enter the name (or part of name) you want to filter results by.  Leave blank to include all contacts.
SEARCH FOR INVOICES button	Click this button to display the data for the chosen period on the RESULTS tab page.

**RESULTS TAB PAGE FIELDS**

<p>Category list</p>	<p>The system displays the schedule payments that are at least seven days overdue.</p>
<p>REPORT icon</p> 	<p>Click on the REPORT/PRINT icon to the right of the page header to display the analysis in a separate tab window.</p> <p>The generated report can be printed or exported to a number of different formats by using the buttons at the top of the report page.</p>

# CALENDAR

## INTRODUCTION

The CALENDAR module enables your organisation to;

- View events and appointments by day, week or month;
- View resource availability and bookings by day;
- Click through from the calendar to view event details or to book a place on any event;
- Book resources such as courts, pitches, meeting rooms, etc.

## TERMINOLOGY USED

Appointment	This is the term we use for a calendar entry that links a system user to a contact, e.g., a contact wants a tour of the club so you create an appointment on the calendar and link a system user and the contact to the appointment.
Diary Note	This is the term we use for a diary entry that consists of a text note.  Diary notes can be public or private.
Timeslot	This is the term we use for the rectangular coloured tiles on the calendar that represent event, appointments, resources, etc.  You can click on an event timeslot to open the selected event details.  You can click on a resource timeslot to book the selected resource.
Resource Profile	This is the term we use to describe a collection of resources. Your

	<p>organisation can create an unlimited number of resource profiles.</p> <p>The RESOURCE CALENDAR page uses resource profiles to display resources – you select the required profile and the page displays the resources that belong to the selected profile.</p>
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## GETTING STARTED

<i><b>What you do</b></i>	<i><b>Where you do it</b></i>
You create events to enable people to book.	Click on EVENTS / ADD AN EVENT.
You create resources to enable people to book.	Click on RESOURCES / ADD A RESOURCE.

## EVENT CALENDAR PAGE

This page is used to graphically view the events, notes and appointments created by your organisation.

### DISPLAYING THE PAGE

To display this page:

- Click on the CALENDAR option in the main menu - the system will then display the EVENT CALENDAR page.

### PAGE OVERVIEW

The page consists of a spreadsheet type grid that displays days as columns and time ranges as rows. You can specify how many days are displayed and what times are displayed by clicking on the OPTIONS tab button at the top of the page.

The grid displays the events, notes and appointments that are scheduled for the displayed days and times. Events are colour coded according to the colours allocated to the events by your organisation.

At the top of the page, there are two tab buttons which enable you to customise the displayed grid and to switch the display to the RESOURCES calendar.



Click on the PLUS icon in the page title bar to add a new event, diary note, or a new appointment.


To the right of the heading is the navigation bar, which can be used to easily move forward or backwards through the calendar year.

### PAGE CONTENTS

<p>EVENT CALENDAR grid</p>	<p>The grid displays the events taking place on the days displayed and for the displayed time range.</p> <p>Click on a displayed event to open the selected event's details on the EVENT DETAILS page.</p>
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	<p>You can customise the grid by clicking on the OPTIONS tab button at the top of the page.</p>
<p>Navigation buttons</p>	 <p>The navigation bar enables you to change the dates displayed on the calendar by either clicking on the PREVIOUS button (the arrow pointing left) or by clicking on the NEXT button (the arrows pointing right).</p> <p>Click on the dropdown field between the buttons to set the number of days the calendar will change by, e.g., clicking on the NEXT button when the dropdown field displays WEEK will change the dates displayed on the calendar by one week.</p>
<p>PLUS icon</p>	<p>Click on the PLUS icon in the page title bar to add a new event, diary note, or a new appointment, as follows:</p> <ul style="list-style-type: none"> <li>• ADD A NEW EVENT – the system displays the ADD NEW EVENT page;</li> <li>• ADD DIARY NOTE – the system displays the ADD NEW NOTE page;</li> <li>• ADD NEW APPOINTMENT – the system displays the ADD NEW APPOINTMENT page.</li> </ul>
<p>OPTIONS tab button</p>	 <p>Click on the OPTIONS tab button to display the OPTIONS page.</p> <p>The OPTIONS page enables you to customise the calendar display, e.g., change the</p>

	<p>number of days displayed. A full list of the options available is listed below.</p>
<p>RESOURCE CALENDAR tab button</p>	<div style="text-align: center; margin-bottom: 10px;">  </div> <p>Click on the RESOURCE CALENDAR tab button to display the RESOURCE CALENDAR page.</p> <p>You can switch back to the EVENT CALENDAR page by clicking on the corresponding tab button on the resource calendar page.</p>

### OPTIONS PAGE FIELDS

The options you set are set for your user ID only and the system remembers the settings each time you sign into the system.

<p>Display From Date</p>	<p>Type in/select the date you want to display on the calendar.</p>
<p>Set Display Date to Today</p>	<p>Click this link to set the DISPLAY FROM DATE to today.</p>
<p>Display From/To</p>	<p>Enter the time range you want to display</p>
<p>Days to Display</p>	<p>Select the number of days you want to display on the calendar.</p>
<p>Appointment Colour</p>	<p>Select the background colour to use to display appointments on the calendar.</p>

Note Colour	Select the background colour to use to display notes on the calendar.
Time Interval	Set the time each row on the calendar represents – the smaller the interval, the greater the space that will be used to display an hour.
Row Height	Set the height of each row on the calendar.
Display	Click on/off the types of information you want to display.
Event Type	<p>The system displays all event types and categories by default on the calendar.</p> <p>Use the EVENT TYPE and EVENT CATEGORY fields to limit what events are displayed on the calendar.</p>
Event Category	<p>The system displays all event types and categories by default on the calendar.</p> <p>Use the EVENT TYPE and EVENT CATEGORY fields to limit what events are displayed on the calendar.</p>

## RESOURCE CALENDAR PAGE

This page is used to display resource availability and any bookings.

### DISPLAYING THE PAGE

To display this page:

- Click on the RESOURCES option in the main menu - the system will then display the RESOURCES menu;
- Click on the RESOURCE CALENDAR option – the system will then display the RESOURCE CALENDAR page.

### PAGE OVERVIEW

The page displays a list of resources by date and time. It displays one day at a time and displays all of the resources that belong to the displayed RESOURCE PROFILE.




The title bar includes navigation buttons, enabling you to easily change the date displayed.

Underneath the title bar is a row of dropdown fields which enable you to select/change the displayed date, change the display to all day or part of the day, and to change the RESOURCE PROFILE displayed.

If you want to book one or more timeslots that are marked as available for booking, click on the required timeslots to mark them as reserved. Once you have selected the required timeslots, click on the THIS BOOKING tab button to process the booking.

### PAGE CONTENTS

<p>RESOURCE CALENDAR grid</p>	<p>The grid displays a series of coloured tiles, each of which represents a bookable timeslot for a resource. Each timeslot details the time of the timeslot and whether the timeslot is available for booking or not.</p> <p>Resources are displayed by column.</p>
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	<p>If you want to book one or more timeslots that are marked as available for booking, click on the required timeslots to mark them as reserved. Once you have selected the required timeslots, click on the THIS BOOKING tab button to process the booking.</p>
<p>Navigation buttons</p>	 <p>The navigation bar enables you to change the date displayed on the calendar by either clicking on the PREVIOUS button (the arrow pointing left) or by clicking on the NEXT button (the arrows pointing right).</p> <p>Click on the dropdown field between the buttons to set the number of days the calendar will change by, e.g., clicking on the NEXT button when the dropdown field displays WEEK will change the date displayed on the calendar by one week.</p>
<p>THIS BOOKING tab button</p>	 <p>Click on this tab button to display a list of the timeslots you have reserved. You can then click on the PROCESS BOOKING button to complete the booking process for the selected timeslots.</p>
<p>EVENTS CALENDAR tab button</p>	 <p>Click on the EVENTS CALENDAR tab button to display the EVENTS CALENDAR page.</p> <p>You can switch back to the RESOURCES CALENDAR page by clicking on the</p>

	<p>corresponding tab button on the event calendar page.</p>
<p>FILTER ROW – first link</p> <p>DISPLAYING TIMESLOTS FOR link</p>	<p>Click on this field to change the date displayed.</p>
<p>FILTER ROW – second link</p> <p>ALL DAY link</p>	<p>Click on this field to change the part of the current date that is displayed in the grid.</p>
<p>FILTER ROW – third link</p>	<p>Click on this link to change the RESOURCE PROFILE displayed on the calendar.</p>

# CLUB AFFILIATION

## INTRODUCTION

This module is used to enable your organisation to affiliate to your governing body.

**This module is only available to sports clubs that access the system using a licence provided to them by their governing body.**

Each governing body that licences the system has their own unique and customised module for affiliation so the details herein can only give an overview of how to use the module. More detailed instructions will be available directly from your governing body on how to complete the details.



## CLUB AFFILIATION PAGE

This page is used to update a club's affiliation details and to submit the details to the governing body.

### DISPLAYING THE PAGE

To display this page:

- Click on the HOME PAGE option in the main menu - the system will then display the HOME page;
- Click on the CLUB AFFILIATION tile on the home page – the system will then display the first page of the CLUB AFFILIATION module.

**PLEASE NOTE – Your governing body can customise the title of the module so the title of the Club Affiliation module tile may differ from that described above.**

### PAGE OVERVIEW

The module consists of a series of pages that prompt you for information about your organisation.

You can navigate between the pages by using the NEXT and PREVIOUS buttons. The system saves the information you have entered on the system each time you click on these buttons.

You can also navigate directly to any page by clicking on the drop-down field located between the NEXT and PREVIOUS buttons.

Once your organisation is ready to complete the affiliation process, navigate to the SUBMISSION page and click on the SUBMIT button. The details instructions from your governing body will detail the payment process, if required.

# CLUB REVIEWS

## INTRODUCTION

This module enables your organisation to review its governance and operating policies/procedures by completing a series of CLUB REVIEWS.

**This module is only available to sports clubs that access the system using a licence provided to them by their governing body.**

Each club review consists of a series of multiple-choice questions. Each answer given generates immediate expert feedback and provides links to enable the organisation to take action where necessary.

Each review also generates a STRENGTHS and WEAKNESSES analysis, as well as a suggested list of tasks for your club development plan.

Each review on the system is linked to a category. The system displays the available reviews by category on the CLUB REVIEW CATEGORIES page, accessed by clicking on the CLUB REVIEWS option in the main menu.

Click on a category to display the available reviews in that category. The system will detail how much of each review has been completed by your organisation.

Click on a review to display the review details on the CLUB REVIEW page, on which you can then answer the review questions.

## CLUB REVIEW PAGE

This page is used to complete a club review.

The review provides your organisation with the means to self-assess and generate suggested actions.

### DISPLAYING THE PAGE

To display this page:

- Click on the CLUB REVIEWS option in the main menu - the system will then display the CLUB REVIEW CATEGORIES page;
- Click on the category you want to view – the system will then display the CLUB REVIEW CATEGORY page;
- Click on the review you want to complete – the system will then display the CLUB REVIEW page.

### PAGE OVERVIEW

The page consists of two tab pages – the QUESTIONS tab page and the RESULTS tab page.

The page header displays a progress bar which displays the % of the review that has been completed.

Click on a question on the QUESTIONS tab page to view the question and select an answer – the system will then display the appropriate response to your answer.

Use the NEXT and PREVIOUS buttons to navigate through the questions. Once completed, the RESULTS tab page is displayed which lists the strengths and weaknesses list generated by the answers, together with a summary of the actions and tasks.

### PAGE CONTENTS

#### QUESTIONS TAB PAGE

Question tiles	Questions are displayed as tiles on the page. They are colour coded as follows:
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	<ul style="list-style-type: none"> <li>• BLUE – not answered</li> <li>• RED – answered – suggested high priority action needed</li> <li>• AMBER – answered – suggested medium priority action needed</li> <li>• GREEN – answered – no action required</li> </ul> <p>Click on a question to display the question and the possible answers.</p> <p>You can use the DISPLAYING link to only display the answered/unanswered questions.</p>
<p>Answering a Question</p>	<p>Each question is displayed with its possible answers as checkboxes.</p> <p>Tick an answer checkbox to select that answer – the system will then hide the unselected answers and display the suggested action for the chosen answer.</p> <p>The suggested actions are colour coded as follows:</p> <ul style="list-style-type: none"> <li>• RED –suggested high priority action needed</li> <li>• AMBER – suggested medium priority action needed</li> <li>• GREEN – no action required</li> </ul> <p>The name of the person who answered the question is displayed underneath the selected answer.</p> <p>You can change the answer by unticking the selected answer or by clicking on the <b>CLICK HERE TO CHANGE ANSWER</b>.</p> <p>You can add comments to a question by clicking on the <b>COMMENTS</b> tab.</p>

	<p>Use the NEXT and PREVIOUS buttons to move between questions or you can click on the BACK TO QUESTIONS button to redisplay the question tiles.</p>
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**RESULTS TAB PAGE**

<p>Strengths and Weaknesses</p>	<p>The system displays a summary of the strengths and weaknesses that have been generated by the answers to the questions.</p>
<p>Recommendations for your club</p>	<p>The system displays a summary of the recommendations that have been generated by the answers to the questions.</p> <p>Click on a recommendation to view the details.</p>
<p>Objectives for your development plan</p>	<p>The system displays a summary of the actions that have been generated by the answers to the questions and copied into the Club Development Plan.</p>

**PAGE MENU**

<p>Display Questions</p>	<p>Select this option to display the QUESTIONS tab page.</p>
<p>Display Results</p>	<p>Select this option to display the RESULTS tab page.</p>

Display Recommendations summary report	Select this option to run a report detailing the recommendations made.
Clear ALL answers	Select this option to clear all of the answers from the review.

# COMPETITIONS



## INTRODUCTION

The competition module enables your organisation to;

- Set up an unlimited number of competitions such as ladders, leagues and tournaments, for any type of sport or activity;
- Set up competitions for specific gender and age groups;
- Generate tournament draw sheets automatically;
- Set up ladders to process end of season promotion and relegation automatically;
- Enable members and non-members to enter competitions online via the customer portal, record their results (and match comments) and track progress;
- Publish results to the customer portal as news items.

## TERMINOLOGY USED

Ladder	This is the term we use for a competition where each of the players are placed into one table with the aim of winning matches against higher placed players to get as high up the standings as possible.
League	This is the term we use for a competition where each of the players are placed into divisions and play the other players in their division within a certain date range. The best performing players are then promoted to higher leagues and the worst performing players are relegated to lower leagues.
Season	This is the term we use for each time period within a LEAGUE, e.g., you may have a summer season which runs from May-August, then an Autumn season from September-December. At the end of the season, the players are

	promoted/relegated for the next season based on their results.
Division	This is the term we use for each group within a league, e.g., you may have a Premier League, Division 1, Division 2, etc. The players in each division will play each other.
Tournament	This is the term we use for a competition where the winner of a match advances to the next round with the aim of advancing to the final. Alternatively, the competition can be a ROUND ROBIN (where each player plays the others).
Knockout	This is the term we use for a tournament where the winner advances to the next round and the loser is knocked out of the tournament.  The maximum number of players in a knockout tournament is 64.
Round Robin	This is the term we use for a tournament where everyone plays against all the other players in the tournament and the player with the best results will be deemed the winner.  The maximum number of players in a round robin tournament is 8.
Seed	This is the term we use for ranking the players in a competition so that the best players only play each other at an appropriate stage of the tournament.
Competition Type	This is the term we use for the individual events within a competition, e.g., if you have a competition called CLUB CHAMPIONSHIPS, the competition types

	could be MEN'S SINGLES, LADIES SINGLES etc.
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## GETTING STARTED

Before you can set up your competitions, you will need to set up the following:

- **ACTIVITIES** – the different sports that you offer, e.g., tennis, squash, racquetball etc.
- **INCOME CATEGORIES** – the different types of income, e.g., subscriptions, coaching, bar income. You will need to ensure that an income category related to **COMPETITIONS** has been set up.

## ADD A COMPETITION PAGE

The ADD A NEW COMPETITION page enables you to set up your competitions.

### DISPLAYING THE PAGE

To display the ADD A NEW COMPETITION page:

- Click on the COMPETITION menu option in the main menu – the system will then display the COMPETITION menu options;
- Click on the ADD NEW COMPETITION option – the system will then display the ADD NEW COMPETITION page.

### PAGE OVERVIEW

Enter the details of your new competition. Once you have completed the details, click on the SAVE button to display your new competition on the COMPETITION DETAILS page.

### PAGE CONTENTS

TYPE	Select the type of your new event from the following options; LADDER, LEAGUE or TOURNAMENT.
CATEGORY	Select the category of your event from the ones you have previously set up.
COMPETITION NAME	Enter the name of your competition, e.g., 2021 Club Championships.
ORGANISER NAME	Enter the name of the person running the competition. This will be visible to the players on the portal.

ORGANISER EMAIL	Enter the email address of the person running the competition. This will be visible to the players on the portal.
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## ADD A NEW COMPETITION CATEGORY PAGE

The ADD A NEW COMPETITION CATEGORY page enables you to set up your competition categories.

### DISPLAYING THE PAGE

To display the ADD A NEW COMPETITION CATEGORY page:

- Click on the COMPETITION menu option in the main menu – the system will then display the COMPETITION menu options;
- Click on COMPETITION CATEGORIES option. The COMPETITION CATEGORY page will be displayed.
- Any existing COMPETITION CATEGORIES will be displayed on screen. Click the 'plus' icon to display the ADD NEW COMPETITION CATEGORY page.

### PAGE OVERVIEW

Enter the details of your competition category. Once you have completed the details, click on the SAVE DETAILS button to return to the COMPETITION CATEGORY page or SAVE AND ADD ANOTHER to redisplay the page and add another competition category.

### USING THE PAGE

The page consists of the following elements:

TITLE	Enter the name of your competition category, e.g., TENNIS LEAGUES.
DESCRIPTION	Enter any further details as required.
FOR ACTIVITY	Select the activity for your competition.
INCOME CATEGORY	Select the income category for your competition.

SORT ORDER	Enter the sort order number to determine the order in which your COMPETITION CATEGORIES will display in for this competition. The lower the sort order, the higher up the table a competition category will display.
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## ADD A NEW COMPETITION TYPE PAGE

The ADD A NEW COMPETITION TYPE page enables you to set up your competition types.

### DISPLAYING THE PAGE

To display the ADD A NEW COMPETITION TYPE page:

- Click on the COMPETITION menu option in the main menu – the system will then display the COMPETITION menu options;
- Click on the required competition – the COMPETITION DETAILS page will be displayed.
- Any existing COMPETITION TYPES will be displayed in the right-side column. Click on an existing to update the details or click the 'plus' icon to display the ADD NEW TOURNAMENT TYPE screen.

### PAGE OVERVIEW

Enter the details of your competition type. Once you have completed the details, click on the SAVE button to display your new competition type on the COMPETITION TYPE DETAILS page.

### USING THE PAGE

The page consists of the following elements:

EVENT NAME	Enter the name of your competition type, e.g., Ladies Doubles.
STATUS	Select from the following options; PENDING (default), ACCEPTING ENTRIES, ACTIVE, COMPLETED or CANCELLED.



SINGLES/DOUBLES	Select whether your event is a singles or doubles event.
FOR AGE RANGE	If your event is age restricted, e.g., a junior event then enter the age criteria.
FOR GENDER	If your event is gender restricted then select the gender required.
FOR GROUP	You can limit entries to contacts in a certain CONTACT GROUP. Click the magnifying glass and select the category and group required.
FOR MEMBERSHIP STATUS	Select whether the competition is limited by MEMBERSHIP STATUS. Select from the following options; ALL (open to anyone regardless of membership), MEMBERS – ALL (open to anyone with an active membership), MEMBERS – BY TYPE (restricted to members with a particular membership type). If MEMBERS – BY TYPE is selected, you can set up the required membership types by clicking the plus icon on the right-hand side (next to the MEMBERSHIP TYPES heading). An unlimited number of memberships types can be set up for a competition type.
ENTRY FEE	If you will charge a fee to enter the event, enter the entry fee to be charged.
SCORING TYPE	This will only display if your competition is a LEAGUE. Select from the following options; GAMES (if the number of points awarded is equal to the number of games won) or SETS (if

	you will set the points awarded for each set score, e.g., 2-0 in sets is 4-0 in points, 2-1 in sets is 4-1 in points etc).
BEST OF (SETS)	Enter the number of sets that each match will consist of.
SORT ORDER	Enter the sort order number to determine the order in which your COMPETITION TYPES will display in for this competition. The lower the sort order, the higher up the table a competition type will display.
TOURNAMENT FORMAT	This will only display if your competition is a TOURNAMENT. Select whether the event is a KNOCKOUT or ROUND ROBIN.
DRAW SIZE	This will only display if your competition is a TOURNAMENT. Enter the maximum number of entries (if your tournament format is set to knockout, the maximum is 64 or if your tournament type is set to round robin, the maximum is 8).
NUMBER OF SEEDS	This will only display if your competition is a TOURNAMENT and the tournament format is KNOCKOUT. Enter the number of players that should be seeded. Typically, the number of seeds would be a quarter of the draw size, e.g., for a draw size of 8, you might have 2 seeds and for a 16 draw you might have 4 seeds etc.
POSITIONS ABOVE TO CHALLENGE	This will only display if your competition is a LADDER. Enter the number of places above a player can

	<p>challenge, e.g., if you set to 3, a player ranked number 6 will be able to challenge the players ranked numbers 3, 4 and 5 but not the player at number 2.</p>
<b>DAYS TO RESPOND TO CHALLENGE</b>	<p>This will only display if your competition is a LADDER. Enter the number of days a player has to accept a challenge before the challenger is automatically awarded a win, e.g., to give players a week to accept a challenge, set this to 7.</p>
<b>INACTIVE DAYS BEFORE REMOVAL</b>	<p>This will only display if your competition is a LADDER. Enter the number of days of inactivity before a player should be removed from the ladder, e.g., if this is set to 90 and a player has not played a match in the proceeding 90 days, they will be removed from the ladder and all other positions recalculated automatically.</p>

## TOURNAMENT DETAILS PAGE

The TOURNAMENT DETAILS page enables you to add players to the tournament, allocate seeds and generate the draw. You can then add match results and set up the tournament rounds.

### DISPLAYING THE PAGE

To display the ADD A NEW COMPETITION page:

- Click on the COMPETITION menu option in the main menu – the system will then display the COMPETITION menu options;
- Click on the required competition – the COMPETITION DETAILS page will be displayed.
- Select the required COMPETITION TYPE on the right-hand side.

### PAGE OVERVIEW

The details of your tournament will be displayed in the SUMMARY SECTION. Beneath that, the PARTICIPANT LIST will display the players currently entered into this tournament (ordered by seed number). Click on a player to update their seed number. Click the 'plus' icon to add a new player to the tournament.

When the tournament is ready to start, click the menu icon next to the PARTICIPANT LIST header to GENERATE DRAW. The full draw will then be displayed on screen. Click on a match to update the score. The winning player/pair will automatically be moved to the next round (or marked as the winner if the match was the final).

Use the PAGE BREADCRUMB to return to the TOURNAMENT DETAILS page and the MATCHES and ROUNDS will be displayed on the right side of the screen. Click on a match to update the score.

Click on a round to set the round name (e.g., QUARTER FINAL, SEMI FINAL etc.) and the deadline (when the match should be played by). Players will be sent reminders via email if they have not played a match within 7 days of the deadline.

## SET UP YOUR ROUND ROBIN TOURNAMENT

The TOURNAMENT DETAILS page enables you to add players to the tournament and add match results.

### DISPLAYING THE PAGE

To display the ADD A NEW COMPETITION page:

- Click on the COMPETITION menu option in the main menu – the system will then display the COMPETITION menu options;
- Click on the required competition – the COMPETITION DETAILS page will be displayed.
- Select the required COMPETITION TYPE on the right-hand side.

### PAGE OVERVIEW

The details of your tournament will be displayed in the SUMMARY SECTION. Beneath that, the PARTICIPANT LIST will display the players currently entered into this tournament. Click the 'plus' icon to add a new player to the tournament.

When the tournament is ready to start, click the menu icon next to the PARTICIPANT LIST header to GENERATE DRAW. The matches for each player will be created (one against each of the other players).

The MATCHES will be displayed on the right side of the screen. Click on a match to update the score. The CURRENT STANDINGS will be automatically updated and the players will be ranked on the number of matches won/lost and if the number of matches is equal, then the number of sets won/lost will be taken into account.

## LEAGUE DETAILS PAGE

The LEAGUE DETAILS page enables you to view details of the league.

### DISPLAYING THE PAGE

To display the LEAGUE DETAILS page:

- Click on the COMPETITION menu option in the main menu – the system will then display the COMPETITION menu options;
- Click on the required competition – the COMPETITION DETAILS page will be displayed.
- Select the required COMPETITION TYPE on the right-hand side.

### PAGE OVERVIEW

The details of your league will be displayed in the SUMMARY SECTION. Click on a link in the summary section to update the details. Beneath that, the SCORING RULES section will be displayed (if the scoring type for the league is SETS).

If your scoring type is SETS, then click the 'plus' icon next to the SCORING RULES header. You can then assign the number of points for each set score, e.g., 2-0 in sets is 4-1 in points, 2-1 in sets is 4-2 in points etc. You can also assign the number of points awarded in the event of a walkover, by ticking the THIS IS A WALKOVER checkbox.

The SEASONS will be displayed on the right side of the screen. If there is not a season set up for the league then click the 'plus' icon to add your first season.

The ADD NEW SEASON popup box contains the following fields:

SEASON NAME	Enter the name of season, e.g., Summer.
START DATE	Select the date that the season will start.
FINISH DATE	Select the date the season will finish.

BONUS POINTS	You can award bonus to players if they play half of their matches by a certain date. Select the number of points that should be awarded. Enter 0 to not award bonus points.
BONUS POINTS DATE	Select the date that matches should be played by to receive the bonus points.

## SEASON DETAILS PAGE

The SEASON DETAILS page enables you to view details of the season, add players to the competition and view the divisions.

### DISPLAYING THE PAGE

To display the SEASON DETAILS page:

- Click on the COMPETITION menu option in the main menu – the system will then display the COMPETITION menu options;
- Click on the required competition – the COMPETITION DETAILS page will be displayed.
- Click on the required COMPETITION TYPE on the right-hand side – the LEAGUE DETAILS page will be displayed.
- Select the required SEASON on the right-hand side – the SEASON details page will be displayed.

### PAGE OVERVIEW

The details of your season will be displayed in the SUMMARY SECTION. Click on a link in the summary section to update the details. Beneath that, the DIVISIONS section will be displayed. Click the menu next to the DIVISIONS header to add a new division.

The ADD NEW DIVISION popup box contains the following fields:

DIVISION NAME	Enter the name of the division, e.g., League A, League B etc.
ORDER	Enter the number of how your division relates to the existing divisions. The lower the number entered, the higher the division will be considered when promotion/relegation is calculated. For example, League A would have an order of 1, League B would have an order of 2 etc. This will ensure that players being relegated from League A will then go into League B and players promoted from League B will go into League A. If a



	League C was then to be added, this should have an order of 3.
PLAYERS	Enter the maximum number of players who can be in the division.
PROMOTED	Enter the number of players who should be promoted from the division when a season is finished. If this is the 'top' division, then enter 0 here.
RELEGATED	Enter the number of players who should be relegated from the division when a season is finished. If this is the 'bottom' division, then enter 0 here.

On the right-hand side is the WAITING LIST. This is a list of players who have requested to join the league. You can also add new players to the waiting list by clicking the 'plus' icon and searching for the player by name.

The players will be listed in the order they joined the waiting list. Click on a player to assign them manually to a division or click the menu icon next to the 'plus' icon and click ASSIGN TO DIVISIONS to automatically assign them to the first division in which there is space. The players will be assigned in the order they joined the waiting list.

When a season has come to an end and you are ready to start the next one, click FINISH SEASON AND START NEW after clicking the page menu. You will need to enter the settings for the new season, e.g., season name, start/finish date etc. The system will then automatically calculate who should be promoted/relegated based on the settings for each division. The new season with the players in their new divisions will be displayed on screen.

## DIVISION DETAILS PAGE

The DIVISION DETAILS page enables you to view details of the division.

### DISPLAYING THE PAGE

To display the DIVISION DETAILS page:

- Click on the COMPETITION menu option in the main menu – the system will then display the COMPETITION menu options;
- Click on the required competition – the COMPETITION DETAILS page will be displayed.
- Select the required COMPETITION TYPE on the right-hand side.
- Select the required SEASON on the right-hand side – the SEASON DETAILS page will be displayed.
- In the DIVISIONS section, select the required division – the DIVISION DETAILS page will be displayed.

### PAGE OVERVIEW

The details of your division will be displayed in the SUMMARY SECTION. Click on a link in the summary section to update the details. Beneath that, the MATCHES section will display all of the matches for the division. Click the PENDING text to update the match result.

The CURRENT STANDINGS are displayed on the right side of the screen and will be automatically updated after saving a match result.

Players in a promotion position will be displayed above a green line; players in a relegation position will be displayed below a red line.

## LADDER DETAILS PAGE

The LADDER DETAILS page enables you to add players to ladder, view challenges and add match results.

### DISPLAYING THE PAGE

To display the ADD A NEW LADDER page:

- Click on the COMPETITION menu option in the main menu – the system will then display the COMPETITION menu options;
- Click on the required competition – the COMPETITION DETAILS page will be displayed.
- Select the required COMPETITION TYPE on the right-hand side.

### PAGE OVERVIEW

The details of your tournament will be displayed in the SUMMARY SECTION. Click on a link to update the ladder settings. Beneath that, the PARTICIPANT LIST will display the players currently entered into this tournament. Click the 'plus' icon to add a new player to the tournament. The player will be assigned to the first available position in the ladder, e.g., if there are already 9 players in the ladder, the new player will be put at the bottom of the ladder in position 10. You can click on an existing player and manually update their position – the position of the other players will be automatically recalculated.

You can view details of challenges and matches, click on a match score to update the result. If the winner is the player in the lower position (the challenger) then the challenger will take the position of the beaten player and the players in between will be moved down one spot, e.g., if the player in position 6 beats the player in position 4, then the player in position 6 would take position 4, the loser would shift down one to position 5 and the player in position 5 would also shift down one to position 6.

Challenges can be submitted to other players in the portal based on the settings set up for the competition type (e.g., number of positions above to challenge etc.)

# CONTACTS

## INTRODUCTION

The CONTACTS module enables your organisation to;

- Easily add and update an unlimited number of individuals and organisations on the system as contacts;
- Record any type of information about the contacts and easily search for data via the contact query tool;
- Record notes, conversations, emails and texts with contacts on the system;
- Create an unlimited number of contact groups, enabling your organisation to group contacts by any criteria, e.g., volunteers, coaches, new members, squads, etc.
- Promote activities and events to targeted contacts via email or text.

## TERMINOLOGY USED

Contact	<p>This is the term we use to represent an individual or organisation whose details are recorded on the system.</p> <p>You can add an unlimited number of contacts to the system.</p>
Contact ID	<p>Each contact saved to the database is allocated a unique five-digit system ID known as the CONTACT ID.</p>
Contact Group	<p>This is the term we use to denote a group of contacts, e.g., you could create a contact group called COACHES and link the coaches in your organisation to this group.</p> <p>Groups are typically created for:</p> <ul style="list-style-type: none"> <li>• Types of workers/volunteers within your organisation, e.g., Coaches,</li> </ul>

	<p>Instructors, Volunteers, Tutors, Board members, etc.</p> <ul style="list-style-type: none"> <li>• Types of customers, e.g., Teams, Squads, etc.</li> </ul> <p>You can create an unlimited number of CUSTOM FIELDS for a group, enabling you to record specific data related to a group.</p> <p>Contact groups are particularly useful for communication – you can easily send emails, text messages and notifications to all contacts in a contact group.</p>
Tag	<p>This is the term we use to describe a setting on the system that you want to assign to one or more contacts.</p> <p>For example, you could create a tag called SUBSCRIBED TO MONTHLY NEWSLETTER and link any contacts who subscribe to that tag. You could then run a query to bring back all contacts with that tag when you want to send your newsletter out to them.</p> <p>Tags differ from Contact Groups in that you can't add custom fields to a tag.</p>
Custom Field	<p>This is the term we use to describe a piece of information/data that you want to add to the system.</p> <p>For example, your organisation decides that it wants to record...</p>
Custom Form	<p>This is the term we use to describe a form you create on the system that contains custom fields.</p> <p>You can create an unlimited number of custom forms on the system and link them to contacts on the system.</p>

	<p>For example, your organisation wants prospective members to fill in an online form. You could create the required form as a custom form and add any information you want to capture as a set of custom fields. Once created, you can then embed the form on a website and you can set the form up so that the system informs you whenever someone fills in the form.</p>
Note	<p>This is the term we use for information recorded about a contact.</p> <p>You can create an unlimited number of notes for a contact.</p>
Associate	<p>This is the term we use to denote a contact who has a connection with another contact, e.g., their child, spouse, etc.</p> <p>You select the type of relationship between the contacts when you link them together.</p> <p>A typical use for this would be to link the children of a family to the parents.</p>
Contact Feedback	<p>This is the term we use for the process by which customer portal users can submit feedback to your organisation.</p>

## GETTING STARTED

Before you can start adding contacts to the system, you will need to:

## ADD NEW CONTACT PAGE - INDIVIDUAL

This page enables you to add a new contact to the system. It is intended for adding an individual – there is a different page for adding an organisation.

### DISPLAYING THE PAGE

To display the ADD NEW CONTACT - INDIVIDUAL page:

- Click on the CONTACTS menu option in the main menu – the system will then display the CONTACTS menu options;
- Click on the ADD NEW INDIVIDUAL option – the system will then display the ADD NEW INDIVIDUAL page.

### PAGE OVERVIEW

The page prompts you to enter the FIRST NAME and SURNAME of the individual whose details you want to add as a new contact.

Once entered, you click the NEXT button and the system will then check the name entered to see if there are any existing contacts on the system with the same name. If there are, the system will display the matching contacts to enable you to either select the existing contact or to carry on and create a new contact.

You are then prompted to enter the details of the new contact. Once completed, click on the CREATE NEW CONTACT button to save the details as a new contact.

You can set what fields are mandatory by clicking on the page menu and selecting the PAGE SETTINGS option. The system will then display the CONTACT PAGE SETTINGS page, in which you can set what fields you want to display and you can set what fields are mandatory.

### PAGE CONTENTS

The page consists of the following elements:

First Name	Enter the first name of the contact
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Surname	Enter the surname of the contact
Middle Names	Enter the middle names, if any, of the contact
Active/Inactive	<p>Contacts are marked as ACTIVE or INACTIVE, with ACTIVE the default setting.</p> <p>Mark any contacts that you don't want to appear in queries by default as INACTIVE.</p> <p>If you select INACTIVE, the system will then display the INACTIVE STATUS field, in which you can optionally select the reason for the inactivity, e.g., Deceased.</p>
Title	Select the TITLE setting, e.g., Mr, Mrs, etc.
Gender	Select the GENDER setting, e.g., Female, Male, etc.
Address fields	<p>Enter the address details in the address fields.</p> <p>You can also populate the address fields by entering the post code in the POST CODE field and then clicking on the FIND ADDRESS BY POSTCODE button. The system will then display matching addresses from which you can select the required address, thereby populating the address fields automatically.</p>

Phone Numbers	Enter the Home, Mobile, and Work numbers as required.
Emergency Contact	Enter the emergency contact details in the field – this information is used on event registers for under 18 participants.
Email Address	Enter the primary email address for the contact.
Date of Birth	<p>Enter the date of birth in the format 'dd/mm/yy' or click on the chevron to pick the date from the date picker.</p> <p>The system will then calculate the current age and display this in the AGE field.</p>
Medical Notes	Enter any relevant medical information – this information is displayed in event registers.
Save Changes	<p>Click on the SAVE button to save the details and add the person as a new contact.</p> <p>If there are any errors, the system will display an appropriate message and will highlight the errored fields.</p> <p>If there are no errors, the new contact is allocated a unique contact ID and the person's contact details are displayed on the CONTACT DETAILS page, from where you can then add further details, such as assigning the person to a contact group, tag, add associates, etc.</p>

## ADD NEW CONTACT PAGE - ORGANISATION

This page enables you to add a new contact to the system. It is intended for adding an organisation – there is a different page for adding an individual.

### DISPLAYING THE PAGE

To display the ADD NEW CONTACT - ORGANISATION page:

- Click on the CONTACTS menu option in the main menu – the system will then display the CONTACTS menu options;
- Click on the ADD NEW ORGANISATION option – the system will then display the ADD NEW ORGANISATION page.

### PAGE OVERVIEW

The page consists of a number of fields to enable you to enter the information required for the organisation you are adding to the system.

Complete the fields as required and then click on the SAVE button to save the new organisation as a contact on the system.

### PAGE CONTENTS

The page consists of the following elements:

Name	Enter the name of the organisation
Address fields	<p>Enter the address details in the address fields.</p> <p>You can also populate the address fields by entering the post code in the POST CODE field and then clicking on the FIND ADDRESS BY POSTCODE button. The system will then display matching addresses from which you can select the</p>

	required address, thereby populating the address fields automatically.
Phone Number	This is the primary phone number for the organisation.
Email Address	This is the primary email address for the organisation.
Set Access Level	<p>You can limit access to this organisation by setting an appropriate access level.</p> <p>Set to NONE to allow anyone to access the details if they have the rights to open contacts.</p>
Web Site URL	This is the URL for the organisation's web site.
Contact First Name	<p>This is the first name of the primary contact for this organisation.</p> <p>Alternatively, you can add one or more associates to the organisation once you have added the organisation as a contact.</p>
Contact Surname	This is the surname of the primary contact for the organisation.
Position	This is the position within the organisation of the primary contact, e.g., Director, Manager, etc.

Office Phone Number	This is the office phone number of the primary contact.
Mobile Phone Number	This is the mobile phone number of the primary contact.
Email address	This is the email address of the primary contact.
Save Changes	<p>Click on the SAVE button to save the details and add the organisation as a new contact.</p> <p>If there are any errors, the system will display an appropriate message and will highlight the errored fields.</p> <p>If there are no errors, the new contact is allocated a unique contact ID and the organisation's contact details are displayed on the CONTACT DETAILS page, from where you can then add further details, such as assigning the organisation to a contact group, tag, add associates, etc.</p>

## FIND A CONTACT PAGE

This page is used to find contact details on the system.

### DISPLAYING THE PAGE

To display this page:

- Click on the CONTACTS option in the main menu - the system will then display the CONTACTS menu;
- Select the FIND A CONTACT option in the CONTACTS menu – the system will then display the FIND A CONTACT page.

### PAGE OVERVIEW

The page consists of two tab pages – a CRITERIA tab page and a RESULTS tab page.

The CRITERIA tab page enables you to enter details of what you want to search the system for to find contacts, e.g., enter 'Smith' in the SURNAME/NAME field to find all contacts whose surname/name starts with 'Smith'.

Click on the SEARCH FOR CONTACTS button once you have entered your criteria – the system will then display the RESULTS tab, listing the matching contacts it has found. Please note that the RESULTS tab is not displayed until you click on the SEARCH FOR CONTACTS button.

You can then click on a contact name to open that contact's details in the CONTACT DETAILS page.

### PAGE CONTENTS

This page consists of two tab pages:

#### SEARCH CRITERIA TAB PAGE

Search for	You can search for individuals only, organisations only or for individuals and organisations (default).
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First Name	Use this field if you want to match results by first name.
Surname/Name	Use this field if you want to match results by surname (individuals) or name (organisations).
Email Address	User this field if you want to match results by email address.
Mobile Number	Use this field if you want to match by mobile number.
Has bookings in last.. days	Use this field if you want to match with anyone who has made a booking in the specific number of days.
Search Mode	<p>There are two options:</p> <ul style="list-style-type: none"> <li>• RESULTS BEGIN WITH SEARCH TEXT – the system will match all criteria fields by checking whether data STARTS WITH the text entered, e.g., if you enter 'Sm' in the surname/name field, the system will return all contacts whose surname BEGINS WITH the characters 'Sm';</li> <li>• RESULTS INCLUDE SEARCH TEXT - the system will match all criteria fields by checking whether data CONTAINS the text entered, e.g., if you enter 'Sm' in the surname/name field, the system will return all</li> </ul>

	contacts whose surname CONTAINS the characters 'Sm'.
Contact ID	Use this field if you want to match by contact ID.
Registered User ID	Use this field if you want to match by the registered user id.
Remember this search	<p>Tick this box if you want the system to redisplay the results when you next select the FIND A CONTACT page.</p> <p>This is particularly useful when opening the details of more than one contact in the results – you can open the contact details for a contact and then come back to the results tab once finished to select the next.</p>
SEARCH FOR CONTACTS button	<p>Click on this button to generate a list of contacts on the system that match the criteria you have entered.</p> <p>The system will display the resulting matches on the RESULTS tab.</p>
CLEAR ALL CRITERIA button	Click on this button to clear any criteria you have entered.

### RESULTS TAB PAGE

The results tab page is only displayed when the SEARCH FOR CONTACTS button is clicked on the CRITERIA tab page.



Contacts list	<p>The system displays a list of contacts that match the criteria entered on the CRITERIA tab.</p> <p>Click on the name of a contact to open that contact's details on the CONTACT DETAILS page.</p>
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## CONTACT DETAILS PAGE

This page is displayed whenever you open a contact record on the system. The page displays a summary of all of the information held on the database for the chosen contact, e.g., their name, address, contact groups, membership information, etc.

### DISPLAYING THE PAGE

There are a number of ways in which you can open a contact record on the system.

The most common way will be to use the FIND A CONTACT page, as follows:

- Click on the CONTACTS menu option in the main menu – the system will then display the CONTACTS menu options;
- Click on the FIND A CONTACT option – the system will then display the FIND A CONTACT page;
- Enter the criteria required to find the contact whose details you want to open, e.g., if you want to open the details for 'John Smith', type 'John' in the FIRST NAME field and type 'Smith' in the SURNAME field, and then click on the FIND A CONTACT button – the system will then display the contacts matching these criteria;
- Click on the name of the contact whose details are displayed in the RESULTS tab screen of the FIND A CONTACT page – the system will then display the CONTACT DETAILS page with a summary of the information held on the database for the chosen contact.

### PAGE OVERVIEW

The page consists of two tab pages – the SUMMARY tab page and the ACCOUNT/BOOKINGS tab page.

Each tab page is split into sections which can be collapsed/expanded.

Use the links in each section to update the contact details.

## PAGE CONTENTS

The page contents are displayed by section in the two tab pages and can include all or some of the following (on the SUMMARY tab page unless stated otherwise):

- Summary
- Groups
- Tags
- Membership
- Associates / Associated To
- Qualifications
- Training Courses
- Files
- Notes
- Financial Summary (on the ACCOUNT/BOOKINGS tab page)
- Event Booking History (on the ACCOUNT/BOOKINGS tab page)
- Resource Booking History (on the ACCOUNT/BOOKINGS tab page)

The contents of each section are detailed below.

## SUMMARY SECTION

The SUMMARY section displays the general information about the contact, e.g., address, status, date of birth, etc.

The SUMMARY section will also display any custom fields that have been set up to display on the contact details page.

Please note the following information on some of the fields/links displayed:

Contact ID	This is the unique ID allocated to the contact by the system.
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<p>Mobile</p>	<p>The mobile number of the contact is displayed if present, together with a SEND TEXT link which is displayed to the right of the number.</p> <p>Click on the link to display the SEND TEXT page.</p>
<p>Email</p>	<p>The email address is displayed if present, together with a SEND EMAIL link which is displayed to the right of the email address.</p> <p>Click on the link to display the SEND EMAIL page.</p>
<p>Portal Username</p>	<p>This is the USERNAME used by the contact to sign into the portal.</p> <p>If the contact has not registered, a red NOT REGISTERED label is displayed.</p> <p>Click on the page menu to register the contact (REGISTER AS PORTAL USER) or to deregister the contact (REMOVE THE PORTAL USER).</p>
<p>Click here to display custom field data for this contact</p>	<p>This link enables you to display all of the custom fields you have set up for a contact.</p> <p>Clicking the link displays the CUSTOM FIELD DATA FOR... page. You can then click on a custom field to update the value of the selected field.</p>

## GROUPS SECTION

The GROUPS section displays a list of the contact groups that the contact is linked to.

Each group displayed has a chevron displayed to the left of the group title – clicking this will expand/collapse the details of any custom fields that are link to that group.

### **ADD CONTACT TO GROUP**

To add the contact to a contact group:

- Click on the PLUS (+) icon to the right of the GROUPS title – the system will then display the ADD CONTACT TO GROUP screen;
- Select the GROUP CATEGORY that the group you want to link to the contact belongs to – the system will then display the groups that belong to the chosen group category;
- Select the required group and click on the ADD GROUP button – the system will then add the group to the GROUPS section of the contact details page.

### **DISPLAY GROUP DETAILS**

To display the tracker/custom fields linked to a group that the contact is linked to:

- Click on the group name – the system will then display the GROUP DETAILS page on which you can then update the details of the group for this contact.

### **REMOVE CONTACT FROM GROUP**

To remove the contact from a group:

- Click on the group name – the system will then display the GROUP DETAILS page;
- Click on the page menu and select the REMOVE CONTACT FROM THIS GROUP option – the system will then prompt you to confirm the removal;
- Click on the YES button to confirm removal – the system will then remove the contact from the group and redisplay the contact details page.

## TAGS SECTION

The TAGS section displays a list of the tags that the contact is linked to.

Tags are displayed by TAG CATEGORY – click on the chevron to the left of the tag category name to display the associated tags.

### ADDING A TAG TO THE CONTACT

To add a tag to the contact:

- Click on the magnifying glass symbol to the right of the tag section title – the system will then display the SET TAGS page;
- Tick the tags you want to add to the contact and click on the SAVE SELECTION button – the system will save the details and redisplay the contact details page;
- Click on the TAGS section to confirm that the tags have been added to the contact.

### REMOVING A TAG FROM THE CONTACT

To remove a tag from the contact:

- Click on the magnifying glass symbol to the right of the tag section title – the system will then display the SET TAGS page;
- Untick the tags you want to remove from the contact and click on the SAVE SELECTION button – the system will save the details and redisplay the contact details page;
- Click on the TAGS section to confirm that the tags have been removed from the contact.

## MEMBERSHIP SECTION

The MEMBERSHIP section displays a list of the memberships linked to the contact.

A summary of the memberships is displayed directly below the section title. Click on the chevron to the left of the section title to expand/collapse the membership details section.

### ADD A MEMBERSHIP

To add a membership for the contact;

- Click on the plus icon to the right of the section title – the system will then display the ADD NEW MEMBERSHIP page for the current contact.

If you add a membership via this page, the system will then redisplay the contact details page and display the details of the new membership in the Membership section.

### **UPDATE MEMBERSHIP DETAILS**

To update the details of a membership;

- Click on the name of the membership – the system will then display the MEMBERSHIP SUMMARY page.

If you update membership details, the system will then redisplay the contact details page and display the details of the updated membership in the Membership section.

### **ASSOCIATES SECTION**

The ASSOCIATES section displays a list of the associates linked to the contact. **PLEASE NOTE** - this section is not displayed if the contact has no associates.

A summary of the associate contacts is displayed directly below the section title. Click on a contact name to open that contact's details on the contact details page.

Click on the chevron to the left of the section title to expand/collapse the associate details section. The system will then display a list of all of the associates, together with details of their relationship to the current contact. Click on the relationship to edit the relationship details or if you want to remove the associate from the current contact.

### **ADD AN ASSOCIATE**

To add an associate to the contact, you can either;

- Click on the plus icon to the right of the section title – the system will then display the SEARCH FOR CONTACT page to enable you to select the contact you want to link to the current contact, OR;
- Click on the page menu and select the ADD ASSOCIATE option – the system will then display the SEARCH FOR CONTACT page to

enable you to select the contact you want to link to the current contact.

### UPDATE ASSOCIATE DETAILS

To update the details of an associate;

- Click on the name of the associate relationship – the system will then display the EDIT ASSOCIATE DETAILS screen;
- Make any necessary changes and then click on the SAVE DETAILS button.

### ASSOCIATED TO SECTION

The ASSOCIATED TO section displays a list of the contacts that the current contact is associated to. **PLEASE NOTE** - this section is not displayed if the contact has no-one they are associated to.

A summary of the associate contacts is displayed directly below the section title. Click on a contact name to open that contact's details on the contact details page.

If you want to amend the relationship details or remove the association, you must click on the contact to whom the current contact is associated to and amend/remove the details from that contact's details.

### QUALIFICATIONS SECTION

The QUALIFICATIONS section displays a list of the qualifications for the current contact. **PLEASE NOTE** - this section is not displayed if the contact has no qualifications.

Use the page menu to add a new qualification.

### TRAINING COURSES SECTION

The TRAINING COURSES section displays a list of the training course information for the current contact. **PLEASE NOTE** - this section is not displayed if the contact has no training details.

Use the page menu to add a new training course entry.



## FILES SECTION

The FILES section displays a list of the files/documents that have been uploaded for the current contact. **PLEASE NOTE** - this section is not displayed if the contact has no uploaded files/documents.

Use the page menu to upload a new file/document.

## NOTES SECTION

The NOTES section displays a list of the contact notes that have been created for the current contact. Notes are displayed by default for the past month – use the DISPLAYING filter field to change this as required. You can also filter the notes displayed by note category by clicking on the CATEGORIES filter field.

Click on the magnifying glass icon to display the NOTES SUMMARY page for the current contact. The NOTES SUMMARY page enables you to display the list of notes for the contact in greater detail and provides additional criteria for filtering the results.

### ADD A NEW NOTE

Click on the PLUS icon to the right of the section title to add a new note for the current contact – the system will then display the ADD A NOTE page.

## FINANCIAL SUMMARY SECTION

The FINANCIAL SUMMARY section displays details of the current account balance for the current contact, together with a list of the transactions for the last 30 days.

The system displays invoices, payments and credit notes – click on an item to open the details for that item.

Click on the magnifying glass icon to display the FINANCIAL STATEMENT page on which the financial details are displayed in greater detail and on which the CRITERIA tab enables you to display transactions for any date range.

### ADD AN INVOICE

You can add a new invoice for the current contact by clicking on the section menu and selecting ADD INVOICE. The system will then display

the ADD NEW INVOICE page, automatically adding the current contact as the recipient of the invoice.

## EVENT BOOKING HISTORY SECTION

The EVENT BOOKING HISTORY sections displays a list of the contact’s bookings for events for the past 30 days.

Click on an event name to view details of the booking.

## RESOURCE BOOKING HISTORY SECTION

The RESOURCE BOOKING HISTORY sections displays a list of the contact’s bookings for resources for the past 30 days.

Click on a resource name to view details of the booking.

## PAGE MENU

The page menu consists of the following options:

<p>Add Associate</p>	<p>Select this option if you want to add an associate to the current contact.</p> <p>The system then prompts you to select the required contact and relationship and then displays the associate’s details in the ASSOCIATES section of the page.</p>
<p>Complete Form as User</p>	<p>Select this option if you want the current contact to complete a form – the system will then prompt you to select the custom form to display to the user.</p> <p>This option is typically used on a tablet to enable the contact to complete a custom form.</p>

Add Disclosure	<p>Select this option if you want to add a disclosure (police check) to the current contact.</p> <p>The system then displays the ADD DISCLOSURE page, on which you can add the details of the disclosure.</p>
Add Qualification	<p>Select this option if you want to add a qualification to the current contact.</p> <p>The system then displays the ADD NEW QUALIFICATION page, on which you can add the details of the qualification.</p>
Add Training Course	<p>Select this option if you want to add details of a training course to the current contact.</p> <p>The system then displays the ADD NEW TRAINING page, on which you can add the details of the training undertaken by the contact.</p>
Upload File	<p>Select this option if you want to add a file/document to the contact details, e.g., a qualification certificate, a DBS/PVG check, etc</p>
Update Alert	<p>Select this option if you want to display an alert message on the page whenever the current contact's details are displayed.</p>
Register as Portal User	<p>Select this option if you want to register the contact as a portal user.</p>

Remove as Portal User	Select this option if you want to remove the contact as a portal user.
Register as Portal Admin	Select this option if you want to register the contact as a portal administrator.  Portal administrators can access additional features when logged onto the Customer Portal, such as creating page shortcuts for use in message tiles.
Delete Contact	Select this option if you want to delete this contact from the system.  The system will prompt you to confirm this action.

## SEND EMAIL PAGE

This page is used to send one or more emails to one or more contacts.

Your organisation will need to set up its email settings (SMTP settings) on the YOUR ORGANISATION page, which can be found in the SYSTEM SETTINGS module. If the email settings are not set up, the page will display the following error message:

***You have not yet set up your email settings on the SYSTEM SETTINGS / YOUR ORGANISATION page so emails cannot currently be sent***

## DISPLAYING THE PAGE

To display this page from the CONTACT DETAILS page:

- Click on the CONTACTS menu option in the main menu and select the FIND A CONTACT option – the system will then display the FIND A CONTACT page;
- Use the CRITERIA tab to search for the contact to whom you want to send an email – click on the contact's name in the RESULT tab of the FIND A CONTACT page to open the select contact's details on the CONTACT DETAILS page;
- Click on the SEND EMAIL link to the right of the EMAIL row in the SUMMARY section table – the system will then display the SEND EMAIL page (this assumes that the contact has a valid email address).

## PAGE OVERVIEW

The page consists of a set of data fields and a button bar.

Enter the details as required and click on the SEND EMAIL button to send the email.

Click on the SEND TEST EMAIL button to send a test email if you want to review the email before sending it to the contact.

**PAGE CONTENTS**

From	<p>This field displays the email details of the sender. The system will default the sender details to the sender information that has been set on the YOUR ORGANISATION page of SYSTEM SETTINGS.</p> <p>Click on the field to edit the details.</p>
To	<p>This field displays a list of the contacts that the email will be sent to.</p> <p>Click on the field to edit the details.</p>
Subject Line	<p>This is the SUBJECT LINE of the email.</p>
Body Text	<p>This is the BODY TEXT of the email. The field enables you to create HTML content, adding images as required.</p> <p>Click on the FULL SCREEN button in the BODY TEXT editor to view the body text editor in full screen mode. Click on the same button to close the full screen mode.</p>
Save email as a contact note	<p>Tick this field if you want the email to be saved as a contact note.</p>
Attachments	<p>Click on the PLUS icon to add attachments to the email.</p>
Set tag for all recipients	<p>Select a TAG from the drop-down field if you want to assign the selected tag to all of the recipients of the email.</p>

**PAGE MENU**

Update FROM/TO details	Select this option to edit the sender and recipient details for the email.
Send email from user email account	Select this option if you want the sender details to be set to the currently logged in user's email settings.
Send email from system email account	Select this option if you want the sender details to be set to the organisation email settings (default).
Add text to body from document	Select this option is you want to add text from a document to the body text.
Add text from body to document	Select this option if you want to copy the current body text to a document.
Add Attachment	Select this option if you want to add an attachment to the email.
Clear attachments from email	Select this option if you want to clear all of the attachments currently attached to the email.

## SEND TEXT PAGE

This page is used to send text messages to one or more contacts on the system.

Text messages are sent via the TEXTLOCAL messaging system, which is a third-party system. Your organisation will need to open a TEXTLOCAL account and have sufficient credits to use the SEND TEXT page functionality.

Click here to go to the TEXTLOCAL web page to open your account

Once you have an account with credit, you will need to link the TextLocal account with ClubServe by recording the account details on the API page of the SYSTEM SETTINGS module.

If the system does not detect that a valid TextLocal account has been linked, this page will display the following message:

“You have not yet set up your text settings on the SYSTEM SETTINGS / API SETTINGS / TEXTLOCAL page so texts cannot currently be sent”

## DISPLAYING THE PAGE

You can display this page by either:

- Opening an existing contact with a mobile phone and, from the CONTACT DETAILS page, clicking on the SEND TEXT link in the SUMMARY section, OR;
- Running a query and clicking on the SEND TEXT TO SELECTED link in the RESULTS tab page menu.

## PAGE OVERVIEW

The page consists of a series of fields to enable you to send a text message to the listed contacts.

Complete the details as prompted and then click on the SEND TEXT button to send the text.

You can copy text from a system document into the MESSAGE TEXT field by using the appropriate option in the page menu.

## PAGE CONTENTS

Here is a summary of the fields on this page:



Sending To	This field displays the details of the recipient(s) of the text message
Message Text	Type in your text message into this field
Sender Name	<p>This field displays the name that will be displayed as the text sender on the text.</p> <p>The system defaults in the TextLocal account name – you can amend this as necessary.</p>
Save text details as a contact note	Tick this field to save the text as a contact note linked to the recipient(s).
Display notification details sent back by TextLocal	<p>Tick this field if you want to display the detailed notification details sent back by TextLocal.</p> <p>If this field is unticked, the system displays a simple SUCCESS or FAILURE message when you click on the SEND TEXT button.</p>
Send in TEST mode	<p>Tick this field if you want to simulate sending a text message – the system will pass the text details to TextLocal but no text will actually be sent.</p> <p>In TEST mode, a TextLocal message is sent back to confirm SUCCESS or FAILURE.</p>
SEND TEXT button	Click the button to send the text. If any mandatory fields are incomplete, the system will display an appropriate message.

## PAGE MENU

The following options are available via the PAGE MENU:

<p>Add text from document</p>	<p>Click this option if you want to use an existing system document to copy text from the document into the MESSAGE TEXT field.</p> <p>This is particularly useful when you want to send a standard message.</p>
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## IMPORT CONTACT DATA PAGE

This page is used to import contact details into the system from a spreadsheet in CSV format.

### DISPLAYING THE PAGE

You can display this page by:

- Click on the main menu option and select the CONTACTS option – the CONTACTS menu will then be displayed;
- Click on the IMPORT CONTACT DATA option – the system will then display the IMPORT CONTACT DATA page.

### PAGE OVERVIEW

The page prompts you to select the file containing the data you want to import from the device you are using to access the system.

Once selected, the system will check the data contained within the file and either:

- Reject the file if it contains errors and then prompt you to fix the errors, OR;
- Accept the file and display the remaining criteria for the import.

Once accepted, the page enables you to view the first ten records to verify that the data has loaded as intended, and prompts you to confirm how you want the data to be loaded.

***PLEASE NOTE – A maximum of 2000 records should be contained in the import file. If you have more records than this to import, split the file into files to ensure each file does not exceed this limit.***

Once the criteria fields have been completed, click on the IMPORT CONTACT DETAILS button to import the data into the system.

Once imported, the page will display a summary of the number of contact records that have been added and amended.

### PREPARING YOUR SPREADSHEET

You should follow the following process to prepare your spreadsheet for importing and minimise any potential issues:

- Add a HEADER row and ensure each column has a HEADER CODE as specified below;
- Replace any commas with spaces with a global find and replace;
- Strip out SEMI-COLONS with spaces with a global find and replace;
- Strip out LINE BREAKS with spaces with a global find and replace (a line break is CTRL + J)

***PLEASE NOTE - If you are still getting a COMMAS FOUND error even after you have completed a global find and replace, it is likely that you have one or more numbers that are using commas as their thousand's separator. To rectify this, change the format of the relevant column(s) to TEXT – this will convert the number to a string format.***

## HEADER CODES

The contact data is identified by the system by the code used in the header row for each column.

The header codes are as follows:

<b><i>Data Type</i></b>	<b><i>Column ID</i></b>
First Name	Firstname
Surname	Surname
Known As	Knownas (defaults to First Name if not provided)
Gender	Gender

Date of Birth	Dob (should be in format dd/mm/yyyy)
Address Line 1	Add1
Address Line 2	Add2
Address Town	Town
Address County	County
Address Post Code	Postcode
Address Country	Country
Region	Region
Home Telephone	Homephone (07 numbers are read in as mobile number)
Work Telephone	Workphone
Mobile Telephone	Mobilephone
Email Address	Email
Web Address	Web

Notes	Notes
Emergency Contact	Emergency
Parent ID	ParentID
Org Ind	Orgind (set to 1 for an organisation)
Organisation Name	Orgname
Organisation main contact first name	Orgcontactfirstname
Organisation main contact surname	Orgcontactsurname
Organisation main contact position	Orgcontactposition
Organisation main contact email	Orgcontactemail
Organisation main contact phone	Orgcontactphone
Parent Name	Parentname
Parent relationship	Parentrelationship

Parent Mship ID	ParentMshipID
Status	status  (ACTIVE= active, anything else in the column= INACTIVE)
Legacy System ID	legacysystemid (unique ID from a previous system)
Parent System ID	parentsystemid (unique ID identifying parent of contact matching to the legacysystemid field)

### CUSTOM FIELDS

You can also load custom field data into the system via the import. If the custom field name you use does not exist on the system, the system will create it when it imports the data.

<i>Data Type</i>	<i>Column ID</i>
Text Field	<p>Set the header for any custom fields to <b>custom&amp;fieldname</b> if the custom field is a TEXT field, where the <b>fieldname</b> is the name of your custom field.</p> <p>Any value in the column will be then saved as text.</p> <p>For example, if you want to save OCCUPATION details as a custom field, you could add the occupation for each person in one column and</p>

	<p>then set the header of that column to <b>custom&amp;Occupation</b>. The system will create the custom field called Occupation (if it doesn't already exist) and then load the data accordingly.</p>
<p>Dropdown List – manual list</p>	<p>Set the header for any custom fields to <b>customdd&amp;fieldname</b> if the custom field is a DROPDOWN list with manually set items, where the <b>fieldname</b> is the name of your custom field.</p> <p>Any value in the column will be then saved as an item in the list.</p>
<p>Dropdown List – tag</p>	<p>Set the header for any custom fields to <b>customddcont &amp;fieldname</b> if the custom field is a DROPDOWN list of contacts with a particular tag, where the <b>fieldname</b> is the name of your custom field.</p> <p>Any value in the column will be then matched against an existing contact.</p>
<p>Boolean Field (True or False)</p>	<p>Set the header for any custom fields to <b>custombool &amp;fieldname</b> if the custom field is a checkbox, where the <b>fieldname</b> is the name of your custom field.</p> <p>Any value in the column will then be saved as TRUE.</p>

**MEMBERSHIP DATA**



You can import membership data for the contacts in the imported file, including details such as their start and expiry dates, membership categories and joining date.

You can import membership data for the contacts in the imported file by adding the appropriate columns to the spreadsheet, as follows:

<i><b>Data Type</b></i>	<i><b>Column ID</b></i>
Existing mship number from a legacy system	Set the column header to <b>mshiplegacyid</b>
ClubServe membership scheme you want the contact to be assigned to	Set the column header to <b>mshipschemeid</b>  Add the scheme ID number to the column
ClubServe membership type you want the contact to be assigned to	Set the column header to <b>mshipschemetype</b>
ClubServe membership category you want the contact to be added to	Set the column header to <b>mshipschemecat</b>
Start date of current membership period	Set the column header to <b>mshipstartdate</b>
Expiry date of current membership period	Set the column header to <b>mshipexpirydate</b>

Membership number (use if you don't want the system to automatically allocate a ClubServe number)	Set the column header to <b>mshipnum</b>
Date the member first joined your organisation	Set the column header to <b>mshipjoiningdate</b>

## GROUPS

You can also load CONTACT GROUP data into the system via the import.

A custom group is always linked to a custom group category so you will need to specify both the group you want to link the contact to and also the group category you want to link the group to.

You achieve this by specifying the category name in the column header and by specifying the group name in the column cell, as follows:

<i>Type</i>	<i>Details</i>
Column Header	<p>You specify that the column is a group by giving the column header a cell value of:</p> <p><b>Group&amp;categoryname</b></p> <p>where <b>categoryname</b> is the name of the category your group belongs to.</p> <p>For example, you want to link a contact to the group <b>Coach</b>. This group belongs to the group category <b>Personnel</b>. You would therefore set the column header value to:</p> <p><b>Group&amp;Personnel</b></p> <p>This informs the system that any value in the column should be considered to be a contact group</p>

	<p>that is linked to the contact group category <b>Personnel</b>.</p> <p>You would then add the word <b>Coach</b> to any column cell that you want to link that contact to this contact group.</p>
<p>Column Cell Value</p>	<p>You specify the name of the group you want the contact to be linked to in the column cell value.</p> <p>For example, you want to link a contact to the group <b>Coach</b>. This group belongs to the group category <b>Personnel</b>. You would therefore set the column header value to:</p> <p><b>Group&amp;Personnel</b></p> <p>This informs the system that any value in the column should be considered to be a contact group that is linked to the contact group category <b>Personnel</b>.</p> <p>You would then add the word <b>Coach</b> to any column cell that you want to link that contact to this contact group.</p> <p>If the contact group/contact group category do not already exist, the import process will create both the group category and group.</p>

**TAGS**

You can also load contact TAG data into the system via the import. If the TAG name you use does not exist on the system, the system will create it when it imports the data.

A custom tag is always linked to a tag category so you will need to specify both the tag you want to link the contact to and also the tag category you want to link the tag to.

You achieve this by specifying the category name in the column header and by specifying the tag name in the column cell, as follows:

<b>Type</b>	<b>Details</b>
Column Header	<p>You specify that the column is a tag by giving the column header a cell value of:</p> <p><b>Tag&amp;categoryname</b></p> <p>where <b>categoryname</b> is the name of the category your Tag belongs to.</p> <p>For example, you want to link a contact to the tag <b>Subscribe to Club Newsletter</b>. This tag belongs to the tag category <b>Marketing</b>. You would therefore set the column header value to:</p> <p><b>Tag&amp;Marketing</b></p> <p>This informs the system that any value in the column should be considered to be a tag that is linked to the tag category <b>Marketing</b>.</p> <p>You would then add the tag name <b>Subscribe to Club Newsletter</b> to any column cell that you want to link that contact to this tag.</p>
Column Cell Value	<p>You specify the name of the tag you want the contact to be linked to in the column cell value.</p> <p>For example, you want to link a contact to the tag <b>Subscribe to Club Newsletter</b>. This tag belongs to the tag category <b>Marketing</b>. You would therefore set the column header value to:</p> <p><b>Tag&amp;Marketing</b></p>

	<p>This informs the system that any value in the column should be considered to be a tag that is linked to the tag category <b>Marketing</b>.</p> <p>You would then add the tag name <b>Subscribe to Club Newsletter</b> to any column cell that you want to link that contact to this tag.</p> <p>If the contact tag/tag category do not already exist, the import process will create both tag category and tag.</p>
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## PAGE CONTENTS

Here is a summary of the fields on this page:

<p>Click here to select the file to import</p>	<p>Click on this link to select the file you want to import from your device.</p> <p>Once imported, the system will check the data within the file and report any errors.</p> <p>If no errors are found, the FILE CONTENTS section and the IMPORT SETTINGS section are displayed.</p>
<p>File Contents</p>	<p>This page section displays the number of records read in from the import file and provides a link to display the first ten records of the imported file.</p>
<p>Import Settings</p>	<p>This page section displays the import criteria fields.</p>

<p>Import Records From</p>	<p>You can specify the range of records to import. The default range includes all records in the file.</p>
<p>Import Description</p>	<p>You must specify a unique ID for the import. Assigning imported contacts to an ID enables you to run a query by import ID should you need to view all records imported at a later date.</p>
<p>Match Contacts On</p>	<p>Tick the data fields you want the system to use to match imported contacts to those already on the system.</p>
<p>If No Match</p>	<p>Select the action you want the system to take if it imports a contact record and finds no match on the system.</p>
<p>Import Contact Details button</p>	<p>Click on this button to import the data.</p> <p>The system will display a wait cursor until such time as the data has been imported.</p> <p><b>We strongly recommend that you run a contact query using the import description as your criteria to check the results.</b></p>

## CONTACT FEEDBACK PAGE

This page displays a summary of the contact feedback items submitted by contacts.

### DISPLAYING THE PAGE

To display this page:

- Click on the CONTACTS option in the main menu - the system will then display the CONTACTS menu;
- Click on the CONTACT FEEDBACK SUMMARY option – the system will then display the CONTACT FEEDBACK page.

### PAGE OVERVIEW

The page consists of two tab pages – the CRITERIA tab page and the RESULTS tab page.

The CRITERIA tab page enables you to search for feedback items by a number of criteria – click on the SEARCH FOR FEEDBACK button to display the matching feedback items.

The RESULTS tab page displays a summary of the feedback items that match the criteria entered.

### PAGE CONTENTS

<p>Feedback table</p>	<p>The table is displayed as three columns – SUBMITTED, IN PROGRESS, and CLOSED.</p> <p>Click on an item to edit the item details – the system will then display the EDIT CONTACT FEEDBACK page.</p> <p>Click on the PLUS icon in the page header to add a new feedback item – the system will then display the ADD NEW CONTACT FEEDBACK page.</p>
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## ADD NEW CONTACT FEEDBACK PAGE

This page is used to add a new contact feedback item.

Feedback items are typically created and submitted by customers on the customer portal.

### DISPLAYING THE PAGE

To display this page:

- Click on the CONTACTS option in the main menu - the system will then display the CONTACTS menu;
- Click on the ADD CONTACT FEEDBACK option – the system will then display the ADD NEW CONTACT FEEDBACK page.

### PAGE OVERVIEW

The page consists of a series of fields.

Enter the details as prompted and then click on the SAVE FEEDBACK DETAILS button. The system will then add a new contact feedback item and display the details on the CONTACT FEEDBACK page.

### PAGE CONTENTS

Title	Enter the title you want to give the feedback details.
Details	Enter the feedback details.
Category	Tickets are grouped by feedback category. Select the category you want to link the feedback to.



Priority	Select the required priority.
Status	Select the required status. The possible values are: <ul style="list-style-type: none"> <li>• Submitted</li> <li>• In Progress</li> <li>• Closed</li> </ul>
Target Date for Current Status	Enter the required target date.
Resolved	Tick this field once the feedback has been resolved.
Reported By	Select the contact who reported the feedback.
Recorded By	Select the system user who recorded the feedback.
Assign to Dept	Select the department of your organisation that you want to assign responsibility for responding to.
Assign to User	Select the department system user that you want to assign responsibility for responding to.

To be Actioned By – Dept	Select the department of your organisation that you want to assign responsibility for actioning the feedback.
To be Actioned By – User	Select the department system user of your organisation that you want to assign responsibility for actioning the feedback.
Action Taken	Enter details of what action has been taken.
Update for Contact	<p>Enter details of the response to the feedback for the contact who reported the feedback.</p> <p><b>PLEASE NOTE</b> – The details entered in this field will be displayed and visible to the contact who reported the feedback in the customer portal.</p>
SAVE FEEDBACK DETAILS button	Click this button to add the new feedback item.

## NEW CONTACT QUERY PAGE

This page is used to create and run a new contact query.

### DISPLAYING THE PAGE

To display this page:

- Click on the CONTACTS option in the main menu - the system will then display the CONTACTS menu;
- Click on the RUN A NEW QUERY option – the system will then display the NEW CONTACT QUERY page.

### PAGE OVERVIEW

The page consists of two tab pages – the CRITERIA tab page and the RESULTS tab page.

The CRITERIA tab page is used to select the filters/conditions you want to set to select the required contacts from the system, and to select what columns of data to display for each contact found.

Select the required criteria and then click on the RUN QUERY button – the system will then run the query by applying your required filters and will then display the results on the RESULTS tab page.

There are a number of options for you to select to work with the results – these can be found in the results section menu.

You can optionally save your query so that you can easily run it again in the future – click on the page menu and select the SAVE QUERY option.

The system remembers the last run query if you move away from the query page – click on the DISPLAY CURRENT QUERY RESULTS option in the CONTACTS menu to go back to the query.

### PAGE CONTENTS

Criteria Tab Page

QUERY CRITERIA section	This section displays the filters you create to apply to the contacts database
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	<p>to bring back the required contacts on the results tab page.</p> <p>The system provides you with one filter by default – STATUS – INCLUDE ACTIVE CONTACTS ONLY. This means that the query will only return contacts whose status is set to ACTIVE.</p> <p>You can add additional filters by clicking on the QUERY CRITERIA section menu and selecting the type of query required. The types of query filter are detailed below.</p> <p>Any filters that you add will be displayed in the QUERY CRITERIA section. Click on an existing filter to amend/remove it from the query.</p>
<p>COLUMNS TO DISPLAY section</p>	<p>This section details the columns that will be displayed when the results are generated. The system will always display the FULL NAME field by default.</p> <p>Click on the CLICK HERE TO ADD link to add columns to your results list. Your selected columns are displayed in this section.</p>
<p>RUN QUERY button</p>	<p>Click on the RUN QUERY button once you have set your criteria/filters and have selected the columns you want to display.</p> <p>The system will then run your query and display the matching contacts on the RESULTS tab page.</p>
<p>RUN AND SAVE QUERY button</p>	<p>Click this button to run the query and also save your query for future use. The system will prompt you to provide a title for your query.</p>

<p>CLEAR ALL CRITERIA button</p>	<p>Click this button to clear down all of the criteria/filters you have set up.</p>
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Query Criteria Filter Types

You can select the filter types below by clicking on the QUERY CRITERIA section menu.

<p>Contact Details</p>	<p>Select this filter to set filters for such fields as:</p> <ul style="list-style-type: none"> <li>• Name</li> <li>• Address</li> <li>• Import Description</li> <li>• Gender</li> <li>• Birthday</li> <li>• Date of birth range</li> <li>• Age</li> <li>• Status</li> </ul>
<p>Custom Fields</p>	<p>Select this filter to set filters for any of the custom fields your organisation has set up on the system.</p>
<p>Group</p>	<p>Select this filter to set filters for any of the contact groups your organisation has set up on the system.</p>
<p>Membership</p>	<p>Select this filter to set filters on membership scheme data such as:</p> <ul style="list-style-type: none"> <li>• Scheme</li> </ul>

	<ul style="list-style-type: none"> <li>• Membership Type</li> <li>• Membership Category</li> <li>• Status</li> <li>• Expiry date range</li> </ul>
Tags	Select this filter to set filters for any of the tags your organisation has set up on the system.
Qualifications	Select this filter to set filters for any of the qualifications your organisation has set up on the system.
Training Courses	Select this filter to set filters for any of the training courses your organisation has set up on the system.
Associate Relationship	Select this filter to set filters on any of the associate relationships your organisation has set up on the system.

Results Tab Page

YOUR QUERY RESULTS section	<p>This section displays the matching contacts found on the system that match the criteria/filters you have set up on the CRITERIA tab page.</p> <p>It displays the contact data fields that you specified in the COLUMNS TO DISPLAY section on the CRITERIA tab page.</p>
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	<p>Click on a contact name to open that contact's details on the CONTACT DETAILS page.</p> <p>Click on the YOUR QUERY RESULTS section menu to display the options available to use the returned results, as follows:</p> <ul style="list-style-type: none"><li>• Export selected records to CSV format;</li><li>• Export selected records to EXCEL format;</li><li>• Delete selected contacts;</li><li>• Send text message to selected;</li><li>• Send email to selected;</li><li>• Export selected to Mailchimp;</li><li>• Add note to selected;</li><li>• Set tag for selected;</li><li>• UNSET tag for selected;</li><li>• Set group for selected;</li><li>• UNSET group for selected;</li><li>• Set custom field for selected.</li></ul> <p>Select the option required and follow the prompts as displayed.</p> <p>You select a contact by clicking on its checkbox at the start of the contact row – click on the checkbox at the top of the list to select/unselect all contacts.</p>
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Save Query	<p>Click on this option to save your query – the system will then display the SAVE QUERY screen.</p> <p>Enter the details as prompted and click on the SAVE DETAILS button to save your query for future use.</p> <p>Queries can be saved as PERSONAL (only you can see them) or PUBLIC (everyone can see them).</p>
Update Query Settings	<p>Click on this option to update the query save details.</p>
Add as Favourite	<p>Click on this option to save the query in your FAVOURITES list.</p>
Remove as Favourite	<p>Click on this option to remove this query from your FAVOURITES list.</p>
Delete Query	<p>Click on this option to delete the query.</p>



# CUSTOMER PORTAL SETTINGS

## INTRODUCTION

The CUSTOMER PORTAL SETTINGS module enables your organisation to customise the look, feel and the functionality of the portal for use by your customers.

### TERMINOLOGY USED

Customer Portal	This is the term we use to describe the app/website that is used by your customers to make bookings, manage their account, etc.
Home Page	<p>This is the term given to the first page displayed to a visitor to the customer portal.</p> <p>It consists of a welcome banner image and a series of tiles that provide the user with a range of options such as booking events, resources, etc.</p>
Home Page Tile	<p>This is the term given to the sections of the home page which contain an icon and a title, e.g., BOOK A COURSE.</p> <p>You can add/remove tiles as required and also control which tiles are visible to whom, e.g., you can set a tile to be only accessible/visible to members.</p>
Custom Message	This is the term given to a message created by your organisation to display on the customer portal.
Page Shortcut	This is the term given to a link that you can create for a particular page on the customer portal.

	<p>Page shortcuts are used in custom messages to enable a customer to quickly and easily access a page on the portal.</p>
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## **GETTING STARTED**

In development

## **PORTAL HOME PAGE LAYOUT**

In development

## CUSTOMER PORTAL SETTINGS PAGE

This page is used to configure the Customer Portal app/website for use by customers of your organisation.

### DISPLAYING THE PAGE

To display this page:

- Click on the main menu and select SYSTEM SETTINGS – the system will then display the SYSTEM SETTINGS menu options;
- Click on the SETTINGS option in the CUSTOMER PORTAL section of the menu – the system will then display the CUSTOMER PORTAL SETTINGS page.

### PAGE OVERVIEW

This page is used to access the various options/pages that make up the settings for the Customer Portal.

It consists of a series of categorised page links – click on the category, e.g., FINANCIAL, to view the options in that category.

Click on an option to display the relevant page.

### PAGE CONTENTS

The page displays four categories, each of which is detailed below:

#### FINANCIAL

Accepting Payments	
GoCardless Settings	
Invoicing	

Paypal Settings	
SagePay Settings	
Stripe Settings	
123send Settings	
Refund/Virtual Wallet Settings	
Suggested Donation Settings	

**MEMBERSHIP SETTINGS**

Portal Settings	
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**VISITOR SETTINGS**

Booking Settings	
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**PORTAL SETTINGS AND LAYOUT**

Home Page Layout	This option enables you to configure what pages and options are displayed to users of the Customer Portal.
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<p>Home Page Messages</p>	<p>This option enables you to configure the home page message area with the system and custom messages you want to display to the different types of customers to the portal.</p>
<p>Page Shortcuts</p>	<p>This option enables you to manage any page shortcuts that have been set up for the customer portal.</p> <p>Page shortcuts are used in custom messages to enable a customer to quickly and easily access a page on the portal.</p>
<p>Portal Settings</p>	

## HOME PAGE LAYOUT

This page enables you to set up the Home Page of the Customer Portal for use by your customers. The Home Page is the first page that is displayed when a customer visits the portal.

### DISPLAYING THE PAGE

To display this page:

- Click on the SETTINGS option in the main menu displayed on the left-hand side of the page - the system will then display the SETTINGS menu;
- In the CUSTOMER PORTAL SETTINGS section on the right side, click SETTINGS - the system will then display the CUSTOMER PORTAL SETTINGS page;
- Click on PORTAL SETTINGS AND LAYOUT and then HOME PAGE LAYOUT - the system will display the HOME PAGE LAYOUT page.

### PAGE OVERVIEW

The page consists of two sections – the LAYOUT SETTINGS section and the PAGE TILES section.

The LAYOUT SETTINGS section enables you to set up the tile layout, page background image, and the default tile icon image.

The PAGE TILES section enables you to set up the tiles you want displayed on the home page of the portal.

Click on the SAVE CHANGES button to save any changes made to the page.

### PAGE CONTENTS

Details of the fields within each section are detailed below:

#### LAYOUT SETTINGS

Portal Tile Layout	Tiles can be displayed in one of two ways.
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	<p>Select IMAGE, TITLE AND DESCRIPTION if you want to display each tile as an image, a title underneath the image, and a description underneath the title.</p> <p>Select IMAGE AND TITLE if you want to display each tile as an image and a title underneath the image (no description is displayed).</p>
Portal Background Image	<p>This is the image that is displayed as the main banner image on the home page.</p> <p>Click on the magnifying glass icon to select the file that you want to use as the image. Once selected, the name of the image is displayed in this field.</p>
Default Portal Tile Image	<p>This is the image that is used for a tile image if one is not set on the specific tile.</p> <p>Click on the magnifying glass icon to select the file that you want to use as the image. Once selected, the name of the image is displayed in this field.</p>
Save Changes button	<p>Click on the SAVE CHANGES button to</p>

**PAGE TILES**

List of Tiles	<p>The tiles that have been set up to display on the home page are listed in display order in the PAGE TILES section.</p> <p>Click on a TILE TITLE to edit the settings for a listed tile.</p>
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	<p>Click on the PLUS icon (displayed to the right of the PAGE TILES section title) to add a new tile.</p>
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## ADD NEW TILE PAGE

This page enables you to add a new tile to the Home Page of the customer portal.

### DISPLAYING THE PAGE

To display this page:

- Click on the SYSTEM SETTINGS option in the main menu - the system will then display the SYSTEM SETTINGS menu;
- In the CUSTOMER PORTAL section on the right side, click SETTINGS - the system will then display the CUSTOMER PORTAL SETTINGS page;
- Click on PORTAL SETTINGS AND LAYOUT and then HOME PAGE LAYOUT - the system will display the HOME PAGE LAYOUT page;
- Click on the PLUS icon to the right of the PAGE TILES section title – the system will then display the ADD NEW HOME PAGE TILE page.

### PAGE OVERVIEW

The page prompts the user to enter the details of the new tile to be added to the portal home page.

Enter the details as required and then click on the ADD TILE button to create the new tile.

### PAGE CONTENTS

Tile Type	There are a number of different types of home page tile that can be added to the home page – details of these can be found below in the TILE TYPE section
Display Order	

Display To	
System Icon	
Allow user to hide this section	
Section Title	
Title to display on home page	

**TILE TYPE**

There are a number of different types of home page tile that can be added to the home page, as follows:

Activity Profiles	
Admin Tasks	
Competitions/Teams	
External Link	
Favourites	
Feedback	

Member Directory	
Resources	

## EDIT TILE DETAILS PAGE

This page enables you to update or delete a tile on the Home Page of the customer portal.

### DISPLAYING THE PAGE

To display this page:

- Click on the SYSTEM SETTINGS option in the main menu - the system will then display the SYSTEM SETTINGS menu;
- In the CUSTOMER PORTAL section on the right side, click SETTINGS - the system will then display the CUSTOMER PORTAL SETTINGS page;
- Click on PORTAL SETTINGS AND LAYOUT and then HOME PAGE LAYOUT - the system will display the HOME PAGE LAYOUT page;
- Click on an existing tile title listed in the PAGE TILES section – the system will then display the EDIT HOME PAGE TILE page.

### PAGE OVERVIEW

The page consists of a set of fields on the left side of the page and, depending on the tile type, a list of the component parts of the page are displayed on the right.

Once the required changes have been made, click on the UPDATE TILE DETAILS page to save the changes made.

If you want to delete the tile from the page, click on the page menu and select the DELETE TILE option. The system will then display a confirmation page to enable you to delete the tile.

## HOME PAGE MESSAGES PAGE

This page is used to set up and configure the messages you want to display to a customer on the customer portal home page.

There are two types of messages that can be displayed:

- SYSTEM MESSAGES – these are automatically generated by the system;
- CUSTOM MESSAGES – these are manually created by you.

### DISPLAYING THE PAGE

To display this page:

- Click on the SYSTEM SETTINGS option in the main menu - the system will then display the SYSTEM SETTINGS menu;
- In the CUSTOMER PORTAL section on the right side, click SETTINGS - the system will then display the CUSTOMER PORTAL SETTINGS page;
- Click on PORTAL SETTINGS AND LAYOUT and then HOME PAGE MESSAGES - the system will then display the HOME PAGE MESSAGES page.

### PAGE OVERVIEW

The page consists of two tab pages – the SYSTEM MESSAGES tab page and the CUSTOM MESSAGES tab page.

Click on the SYSTEM MESSAGES tab to select which system messages are automatically displayed to customers on the portal home page.

Click on the CUSTOM MESSAGES tab page to add/amend/delete your own messages for customers on the portal home page.

Click the SAVE CHANGES button once you have completed your changes.

### PAGE CONTENTS

#### SYSTEM MESSAGES TAB

My Bookings	
Membership Status	
Virtual wallet	
Invoices awaiting payment	
Invoices awaiting direct debit set up	
Feedback updated	

**CUSTOM MESSAGES TAB**

Custom message table	<p>The system displays a list of the custom messages that have been created on the system.</p> <p>Click on a message title to edit/delete.</p> <p>Click on the PLUS icon to the right of the page title to add a new custom message.</p>
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## ADD NEW CUSTOM MESSAGE PAGE

This page is used to add a custom message to the message area on the customer portal home page.

### DISPLAYING THE PAGE

To display this page:

- Click on the SYSTEM SETTINGS option in the main menu - the system will then display the SYSTEM SETTINGS menu;
- In the CUSTOMER PORTAL section on the right side, click SETTINGS - the system will then display the CUSTOMER PORTAL SETTINGS page;
- Click on PORTAL SETTINGS AND LAYOUT and then HOME PAGE MESSAGES - the system will then display the HOME PAGE MESSAGES page;
- Click on the PLUS icon to the right of the page title – the system will then display the ADD NEW CUSTOM MESSAGE page.

### PAGE OVERVIEW

The page consists of a set of fields which prompt you to enter the details of the message that you wish to create.

Enter the details as prompted and click on the ADD NEW MESSAGE button to save the changes.

### PAGE CONTENTS

Message Title	
Message Text	
Button Text	



Button Type	
Display to	
Colour	
Date Range – From	
Date Range - To	

## EDIT CUSTOM MESSAGE PAGE

This page is used to edit or delete a custom message for the message area on the customer portal home page.

### DISPLAYING THE PAGE

To display this page:

- Click on the SYSTEM SETTINGS option in the main menu - the system will then display the SYSTEM SETTINGS menu;
- In the CUSTOMER PORTAL section on the right side, click SETTINGS - the system will then display the CUSTOMER PORTAL SETTINGS page;
- Click on PORTAL SETTINGS AND LAYOUT and then HOME PAGE MESSAGES - the system will then display the HOME PAGE MESSAGES page;
- Click on the title of the message you wish to edit/delete – the system will then display the EDIT CUSTOM MESSAGE page.

### PAGE OVERVIEW

The page consists of a set of fields which prompt you to update the details of the message you are editing.

Enter the details as prompted and click on the SAVE CHANGES button to save the changes.

### DELETING THE MESSAGE

Click on the page menu and select the DELETE MESSAGE option if you want to delete the custom message from the system.

## PAGE SHORTCUTS PAGE

This page is used to display the page shortcuts that have been set up on the system.

Page shortcuts are used in custom messages to enable a customer to quickly and easily access a page on the portal.

Page shortcuts cannot be created from the Back-office system. They can only be created by a portal admin user

### DISPLAYING THE PAGE

To display this page:

- Click on the SYSTEM SETTINGS option in the main menu - the system will then display the SYSTEM SETTINGS menu;
- In the CUSTOMER PORTAL section on the right side, click SETTINGS - the system will then display the CUSTOMER PORTAL SETTINGS page;
- Click on PORTAL SETTINGS AND LAYOUT and then PAGE SHORTCUTS - the system will then display the PAGE SHORTCUTS page.

### PAGE OVERVIEW

The page consists of a list of the page shortcuts that have been set up on the system by portal admin users.

Click on a page shortcut if you want to delete it from the system.

### PAGE CONTENTS

Page shortcuts table	This is a list of the page shortcuts that have been set up on the system.
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# DASHBOARDS

## DASHBOARD PAGE

This page enables you to display chart analysis and statistics on the data held on the system.

The page is specific to the user and dashboard defaults can be set up for users in specific departments of your organisation if required.

### DISPLAYING THE PAGE

To display this page:

- Click on the DASHBOARD option on the main menu – the system will then display the DASHBOARD page.

### PAGE OVERVIEW

The contents of the Dashboard page are selected by the user from a range of template charts and graphs.

Click on the page menu and select the ADD/REMOVE DASHBOARD ITEMS option to add and remove items from your dashboard – the system will then display the DASHBOARD SET UP page.

### PAGE CONTENTS

You can select one or more of the following charts/graphs to display on your dashboard page:

#### CONTACT GROUP

<p>Tiles – Contact Count Analysis</p>	<p>Displays the number of ACTIVE, INACTIVE and COMPLETED contacts in a group</p>
<p>Tiles - Tracker Stage Alerts</p>	<p>Displays the number of OVERDUE contacts in a group</p>

Chart - Number of Contacts by Stage	Displays the number of contacts at each stage of a contact group
Chart - Tracker Stage Conversion Rates	Displays the % of contacts who have moved from stage to stage in a contact group
Chart - Number of Contacts in Groups by Group Category	Displays the number of contacts in each group of a group category

**CONTACT FEEDBACK**

Chart - Contact Feedback Open Tickets by Department	Displays the number of ONTRACK/OVERDUE contact feedback tickets by department
Tiles - Contact Feedback Open Tickets	Displays the number of SUBMITTED/IN PROGRESS contact feedback tickets for a given department

**MEMBERSHIP**

Tiles - Member Statistics	Displays the number of CURRENT, EXPIRED and NEW members for a given scheme
Tiles - New Member Analysis	Displays the number of new members for TODAY, YESTERDAY and LAST 7 DAYS for a given scheme

Chart - Member Statistics by Membership Type	Displays the number of active members by membership type
Chart - Member Statistics by Membership Category	Displays the number of active members by membership category
Chart - Member Statistics by Membership Type Group	Displays the number of active members by membership type group

**MULTICLUB**

Tiles - Welfare Office/Policy Status at Registered Clubs	Displays the number of welfare officers/policies IN PLACE/NOT IN PLACE at registered clubs
Chart - Safeguarding Status at Registered Clubs	Displays the number of welfare officers/training/policies/coach licences IN PLACE/NOT IN PLACE at registered clubs
Tiles - Welfare Officer Training Status at Registered Clubs	Displays the number of welfare officers with/without training at registered clubs
Tiles - Coach Licence Validity at Registered Clubs	Displays the number of coach licences valid/expired at registered clubs

<p>Chart - Disciplines Analysis at Registered Clubs</p>	<p>Displays the disciplines competed in at registered clubs</p>
<p>Chart - Coach by Level at Registered Clubs</p>	<p>Displays the level of coaches at registered clubs</p>
<p>Chart - Coach by Gender at Registered Clubs</p>	<p>Displays the gender of coaches at registered clubs</p>
<p>Chart - Official by Category at Registered Clubs</p>	<p>Displays the number of officials by category at registered clubs</p>
<p>Chart - Official by Gender at Registered Clubs</p>	<p>Displays the gender of officials at registered clubs</p>



## DASHBOARD SET UP PAGE

This page is used to add/remove dashboard items from the dashboard.

### DISPLAYING THE PAGE

To display this page:

- Click on the DASHBOARD menu option in the main menu – the system will then display the YOUR DASHBOARD page;
- Click on the ADD/REMOVE DASHBOARD ITEMS option in the page menu – the system will then display the DASHBOARD SET UP page.

### PAGE OVERVIEW

The page consists of a table that displays the current dashboard items set up by the user.

Click on the PLUS icon to add a new dashboard item. Click on the name of a current dashboard item to remove it from the table.

### PAGE CONTENTS

<p>Current Dashboard items table – PLUS icon</p>	<p>Click on the PLUS icon to add a new dashboard item – the system will then display the ADD ITEM TO DASHBOARD page. The available dashboard items are displayed by dashboard category – click on a category to display the available items in that category.</p> <p>Click on the dashboard item required – the system will then prompt you to select the parameters required for the selected item. Click on the OK button to add the item to your dashboard items list.</p>
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If a field has a number of options, give the field its own table below the main table and list the options, one per row.

Any terminology used should go in the section TERMINOLOGY USED table.

# DOCUMENT LIBRARY

## INTRODUCTION

This module enables your organisation to upload its club documents into the system.

It provides a central repository for all club documents which can be categorised, viewed online, and linked to from external systems.

**This module is only available to sports clubs that access the system using a licence provided to them by their governing body.**

## DOCUMENT LIBRARY PAGE

This page is used to view/access document in the document library.

### DISPLAYING THE PAGE

To display this page:

- Click on the DOCUMENT LIBRARY option in the main menu - the system will then display the DOCUMENT LIBRARY page.

### PAGE OVERVIEW

The page consists of two sections – the YOUR CLUB DOCUMENTS section and the RECOMMENDED DOCUMENTS CHECKLIST section.

Click on a document title to view/edit the selected document.

Click on the PLUS icon in the page header to upload a new document to the library.

### PAGE CONTENTS

DISPLAYING link	Click on the DISPLAYING link to display documents by a single category.
Documents list	Click on a document title to view/edit the document details – the system will then display the EDIT DOCUMENT DETAILS page.
Recommended Documents Checklist	<p>The system displays a list of the documents your governing body recommends that your organisation should upload to the library.</p> <p>The system ticks those documents that you have uploaded to your library.</p>

## UPLOAD A DOCUMENT PAGE

This page is used to upload a document to the document library.

### DISPLAYING THE PAGE

To display this page:

- Click on the DOCUMENT LIBRARY option in the main menu - the system will then display the DOCUMENT LIBRARY page;
- Click on the PLUS icon in the page header – the system will then display the UPLOAD A DOCUMENT page.

### PAGE OVERVIEW

The page prompts you to click the link to select the document to upload from your computer/smart device.

Once uploaded, the page prompts you to enter details about the uploaded document.

Click on the SAVE UPLOAD DETAILS button to save the details of the document to the library.

### PAGE CONTENTS

<p>Click here to select the document to upload</p>	<p>Click this link to display a file select screen to enable you to select the required document.</p>
<p>Click here to view/download the document</p>	<p>Click this link to view/download the document.</p> <p>Document formats that can be opened in a browser are displayed in a separate tab window.</p>

Document Title	Enter the title you want to assign to your document.
This is the Club's...	Select the document type from the list of template document types.
Category	Select a category to assign your document to.
Document URL	This field details the document URL to use to provide access to the document.
Copy URL to clipboard	Click on the link to copy the DOCUMENT URL to the windows clipboard.

# EVENTS



## INTRODUCTION

The EVENTS module enables your organisation to;

- Easily create and manage a wide variety of event types such as coaching courses, fitness sessions, pay and play sessions, holiday camps, performance squads, conferences, ticketed events and social events;
- Create events across an unlimited number of venues and sites;
- Create events for an unlimited number of different types of sports and activities;
- Enable members and non-members to book places online via the customer portal, for themselves and anyone associated with them such as children and spouses;
- Set up different types of fees and payment options, including the ability to provide preferential options for members, existing customers and priority customers;
- Set up the system to take payment via the payment provider of your choice from our wide range of suppliers such as Stripe, Paypal, SagePay, GoCardless, etc. – your organisation controls who it uses and what commission it pays;
- Enable coaches to manage registers online, including the option to record the arrival and departure of children and to record comments and risk assessments;
- Book out courts, pitches and other types of resources such as meeting rooms when setting up events;
- Display custom event calendars to let customers know what is going on at your venue;
- Monitor 'no-shows' and suspend booking rights if the organisation's booking rules are broken;
- Create and complete progress reports for customers/parents that can be viewed on the customer portal.

## TERMINOLOGY USED

Event	<p>This is the term we use to describe the courses and sessions that an organisation can host, e.g., coaching courses, holiday camps, workshops, conferences, social events, etc.</p> <p>You define the type of event added to the system by setting the EVENT TYPE and the EVENT CATEGORY.</p>
Event Session	<p>This is the term we use to describe the individual dates and times that make up the event.</p> <p>An event will typically have one or more sessions.</p>
Activity	<p>This is the term we use to describe a sport or discipline that your organisation will create events for, e.g., athletics, cycling, tennis, football, etc.</p> <p>An event will be linked to one activity.</p>
Event Type	<p>This is the term we use to differentiate the types of event you create on the system.</p> <p>An EVENT TYPE is linked to an activity.</p> <p>An EVENT TYPE can have one or more EVENT CATEGORIES, helping to further differentiate the various types of event a sporting organisation would typically host.</p>
Event Category	<p>This is the term we use to further define an EVENT TYPE. An EVENT TYPE can have one or more EVENT CATEGORIES.</p>

Event Template	This is the term we use to describe a type of event that can be copied and used as a starting point to create a new event.
Session Type	This is the term we use to describe..
Event Period	
Personnel Group	<p>This is the term we use to identify a contact group that is marked as a PERSONNEL group.</p> <p>It is intended for use for contact groups that are created to identify different types of workers/volunteers within the organisation, e.g., coaches, administrators, tutors, etc.</p>
Progress Report	<p>This is the term we use for the document you can create to review the progress of a participant on an event.</p> <p>Progress reports can be used for any type of event and you can customise the contents of the report as you see fit.</p>

## GETTING STARTED

Before you can start creating events, you will need to set up the following:

- **EVENT TYPES** – your organisation will need to decide on what event types you will want to use;
- **EVENT CATEGORIES** – your organisation will need to decide on what categories it wants to create for each event type;

- INCOME CATEGORIES – your organisation will need to decide what income categories to use for each event category;
- etc.

## FIND AN EVENT PAGE

This page is used to find an existing event on the system.

### DISPLAYING THE PAGE

To display this page:

- Click on the EVENTS option in the main menu - the system will then display the EVENTS menu;
- Click on the FIND AN EVENT option – the system will then display the FIND AN EVENT page.

### PAGE OVERVIEW

The page consists of two tab pages – the CRITERIA tab page and the RESULTS tab page. finding an event on the system

Use the CRITERIA tab page to set the criteria for finding an event/events – the system will then display the matching events on the RESULTS tab page.

Click on an event name on the RESULTS tab page to open the selected event on the EVENT DETAILS page.

### PAGE CONTENTS

Criteria Tab Page

Event Title	
Event ID	
Event Type	
Event Category	

Date Range	
Date Type	
Remember this Search	
Search for Events button	
Clear all button	

Results Tab Page

Events list	<p>A list of events on the system that match the criteria entered on the CRITERIA tab page is displayed.</p> <p>Click on an event title to open that event on the EVENT DETAILS page.</p>
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## EVENT DETAILS PAGE

This page is used to display details of an event and enables you to:

- Update/delete event details;
- Add/remove sessions;
- Add/remove fees;
- Book participants.

## DISPLAYING THE PAGE

To display this page:

- Click on the EVENTS option in the main menu - the system will then display the EVENTS menu;
- Click on the FIND AN EVENT option – the system will then display the FIND AN EVENT page;
- Use the FIND AN EVENT page to find the required event and click on the event title – the system will then display the EVENT DETAILS page.

## PAGE OVERVIEW

The page consists of a number of sections which can be collapsed/expanded as required.

Use the links in each section to update the contact details.

## PAGE CONTENTS

The page contents are displayed in sections and can include all or some of the following:

- Summary
- Sessions
- Past Sessions
- Personnel

- Fees
- Financial Analysis
- Bookings for Next Session
- Participant Summary
- To Do List

The contents of each section are detailed below.

## SUMMARY SECTION

Event ID / Status	<p>This is the unique ID allocated by the system to the current event.</p> <p>The status can be set to one of four values:</p> <ul style="list-style-type: none"> <li>• Active</li> <li>• Completed</li> <li>• Cancelled</li> <li>• Provisional</li> </ul>
Title	This is the event title.
Type / Category	This is the event type and event category that have been allocated to the event.
Activity	This is the activity that has been allocated to the event.
Venue	This is the venue where the event will be taking place.



<p>Maximum Places</p>	<p>This is the maximum number of places bookable for the event.</p>
<p>Booking Method</p>	<p>This is the way in which the system processes bookings for the event.</p> <p>Click here for details of the options available</p>
<p>Sessions</p>	<p>This details how sessions will be created.</p>
<p>Need to book resources</p>	<p>This denotes whether resources have been booked for the event.</p> <p>It is displayed if the event has been set up to book out resources (see the ADD AN EVENT page for details).</p> <p>If the resources have not been booked, the system will display a BOOK RESOURCES button to enable you to book out the required resources.</p>

## SESSIONS SECTION

<p>Session List</p>	<p>The system displays a list of the sessions that have been set up for the event.</p> <p>Click on a session date to view the selected session details.</p> <p>To add one or more sessions, click on the PLUS icon to the right of the section title.</p> <p>To display the list of sessions in greater detail, click on the magnifying glass to the right of the section title.</p>
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## PERSONNEL SECTION

<p>Personnel List</p>	<p>The system displays a list of the personnel that have been added to the event.</p> <p>Click on a name to view the selected person’s event details – the system will then display the EDIT PERSONNEL DETAILS page.</p> <p>To add a person to the event, click on the PLUS icon to the right of the section title.</p> <p>To remove a person from the personnel list, click on the person’s name – the system will then display the EDIT PERSONNEL DETAILS page, from which the person can be removed from the event.</p>
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## FEES SECTION

<p>Fees List</p>	<p>The system displays a list of the fees that have been set up for the event.</p> <p>Click on a fee title to edit the selected fee details – the system will then display the EDIT FEE DETAILS page.</p> <p>To add a fee to the event, click on the PLUS icon to the right of the section title.</p> <p>To delete a fee, click on the fee title – the system will then display the EDIT FEE DETAILS page, from which you can then delete the fee from the event.</p>
<p>Message/action set up for person who</p>	<p>This link details whether a message and action have been set up to display to a customer on the customer portal</p>

<p>does not match a fee on portal</p>	<p>if the customer does not qualify for any of the fees that have been set up for the event.</p> <p>Click on the link to set up the required message and action.</p> <p>This field is only displayed if the system detects that all of the fees set up for the event require the customer to be either a member or be linked to a contact group/tag.</p>
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## FINANCIAL ANALYSIS SECTION

<p>Forecast Profit</p>	<p>This is the profit/surplus that has been calculated by the system. If no calculation has been made, the amount is set to zero.</p> <p>Click on the link to display the FINANCIAL SUMMARY page for the event, on which you can then calculate the forecasted profit.</p>
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## PARTICIPANT SUMMARY SECTION

<p>Participant List</p>	<p>This is the list of contacts/customers that are currently booked onto the event.</p> <p>Click on a name to display the PARTICIPANT DETAILS page for the selected participant, on which you can update the booking details as necessary.</p> <p>To add a new participant to the event, click on the PLUS icon to the right of the section title – the system will then display the ADD BOOKING page on which you can add a new participant.</p>
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	<p>To delete a participant, click on the name of the participant – the system will then display the PARTICIPANT DETAILS page, from which you can then delete the participant from the event.</p>
<p>UPDATE PROGRESS REPORTS option in section menu</p>	<p>Click on the UPDATE PROGRESS REPORTS option in the section menu to update progress reports for the participants on the event. The system will then display the UPDATE PROGRESS REPORTS page.</p>

## TO DO LIST

<p>To Do List</p>	<p>This lists the to do items that have been set up for the event. Items are displayed by to do category.</p> <p>To add a new to do item, click on the PLUS icon to the right of the section title – the system will then display the ADD NEW EVENT TO DO ITEM page on which you can create your new item.</p> <p>To edit an item’s details or to mark it as complete, click on the item name - the system will then display the EDIT EVENT TO DO ITEM page on which you can update the details.</p>
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## PAGE MENU

<p>Edit settings – participant email</p>	<p>You can set the default email that is sent to participants when they book a place by clicking on this option. The system will then display the PATICIPANT EMAIL SETTINGS page on which you can select</p>
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	<p>the required documents to use for the email.</p>
<p>Edit settings – portal settings</p>	<p>You can define how the event is displayed on the customer portal by selecting this option. The system will then display the PORTAL SETTINGS page on which you can set up how the event will appear on the portal.</p>
<p>Add session type</p>	<p>This option is used to add a new session type to the event.</p> <p>Session types are displayed in the SESSION TYPES section on the page. This section is not displayed if there are no session types for the current event.</p>
<p>Add session exclusion dates</p>	<p>This option is used to add session exclusion dates to the event. An exclusion date is a date on which no sessions will be created.</p>
<p>Add reminder</p>	<p>This option is used to set up email/text reminders to participants.</p>
<p>Add file</p>	<p>This option is used to add a file/document to the event.</p>
<p>Add note</p>	<p>This option is used to add a note to the event. Event notes can also be linked to a contact.</p> <p>Event notes are displayed in the NOTES section on the page. This section is not displayed if there are no notes for the current event.</p>

Optional extra	<p>This option is used to add an optional extra to the event.</p> <p>Click on this option to display the ADD OPTIONAL EXTRA screen.</p> <p>Optional extras are displayed in the OPTIONAL EXTRA section of the page. This section is not displayed if there are no extras for the current event.</p>
Copy	<p>This option is used to create an exact copy of the current event. This can be useful for when you want to create a new event for the same event type and category.</p>
Book resources	<p>This option is used to book out resources for the sessions. Details of the resources to book are stored on the session details.</p> <p>The system will check for any potential clashes before booking out the resources and report on these to you should it be unable to book out the required resources.</p>
Display booked timeslots	<p>This option is used to display a list of all of the booked resources for the event.</p>

## ADD AN EVENT PAGE

This page is used to create a new event on the system.

### DISPLAYING THE PAGE

To display this page:

- Click on the EVENTS option in the main menu - the system will then display the EVENTS menu;
- Click on the ADD AN EVENT option – the system will then display the ADD AN EVENT page.

### PAGE OVERVIEW

The page consists of two tab pages – the BASIC tab page and the ADVANCED tab page.

A new event can be created from scratch or can be created from an existing template event – the page prompts you to select a template if required.

Complete the displayed fields as prompted and then click on the ADD NEW EVENT button to create the new event – the system then displays the event details on the EVENT DETAILS page, on which you can then add the event session dates, fee types, etc.

### PAGE CONTENTS

#### BASIC TAB PAGE FIELDS

<p>Click here to set up your event from an existing template...</p>	<p>This link enables you to create your new event from an existing template.</p> <p>Click on the link to view the templates available and click on the one required to copy the template settings into your new event.</p>
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Activity	<p>Select an activity from the ones your organisation has set up on the system.</p> <p>You can add a new activity by clicking on the PLUS icon.</p>
Event Type	<p>Select an event type from the ones your organisation has set up on the system.</p> <p>Once selected, the system will then display the event categories that are linked to the selected type in the EVENT CATEGORY field.</p> <p>You can add a new event type by clicking on the PLUS icon.</p>
Event Category	<p>Select an event category from the ones your organisation has set up on the system for the chosen event type.</p> <p>You can add a new event category by clicking on the PLUS icon.</p>
Event Title	<p>This is the title that will be displayed for the event on the calendar and in event listings.</p>
Venue	<p>Select the venue that the event is taking place at.</p>
Available Places	<p>Enter the maximum number of places that can be booked for each session.</p> <p>This figure will be used as the default number of places when you subsequently add sessions to your event. Each session created can be set to a different number of places as required.</p>



Show on event calendar	Tick this field if you want the event to be displayed on the event calendar.
Calendar Colour	This is the colour that will be used to display the event on the event calendar.
Book resources for this event	Tick this field if you want to book out resources for the event.
How do you want participants to book this event?	<p>This field enables you to set how and what type of bookings will be made for this event.</p> <p>A list of the possible options is detailed below in the BOOKING OPTIONS section of this manual.</p>
How should the fees be calculated?	<p>This field enables you to set how the costs for the event should be calculated.</p> <p>The options available for this field will be dependent on what you set the HOW DO YOU WANT PARTICIPANTS TO BOOK THIS EVENT? field to.</p>
<p>Sessions should be generated automatically</p> <p>Sessions to display in advance</p>	<p>Display of these fields is dependent on what you set the HOW DO YOU WANT PARTICIPANTS TO BOOK THIS EVENT? field to.</p> <p>Tick the SESSIONS SHOULD BE GENERATED AUTOMATICALLY field if you want the system to automatically generate the sessions for this event, e.g., the event is a weekly event and will run indefinitely.</p>

<p>ADD NEW EVENT button</p>	<p>Click the button to create the new event on the system. The system will then display the event details on the EVENT DETAILS page, on which you will then be able to add the session dates, add fees, etc.</p>
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**BOOKING OPTIONS**

The system provides a number of ways in which you can set up an event to enable a customer to book and pay for their place on the event.

You select the option required on the HOW DO YOU WANT PARTICIPANTS TO BOOK THIS EVENT? field.

<p>Participant books the whole event</p>	<p>Select this option if you want the participant to pay one fee for all of the sessions on the event.</p> <p>This would typically be used for a coaching course, conference, workshop, etc.</p> <p>The system will then prompt you to set how the fee should be calculated. You can choose to enter a fee manually or you can choose to set an hourly rate that is used by the system to calculate the event fee.</p>
<p>Participant books individual sessions</p>	<p>Select this option if you want the participant to book and pay for each session on the event individually.</p> <p>This would typically be used for pay and play sessions, weekly coaching sessions, etc.</p> <p>The system will then prompt you to set how the fee should be calculated. You can choose to</p>

	<p>enter a fee manually or you can choose to set an hourly rate that is used by the system to calculate the session fee.</p> <p>You are prompted to choose whether you want the system to automatically generate the sessions for the event – this can be particularly useful for those events that occur regularly, i.e., weekly.</p>
<p>Participant books morning/afternoon/day period (e.g., holiday camp/creche)</p>	<p>Select this option if you want the participant to book a selection of different periods of a day.</p> <p>This would typically be used for holiday camp events, creche bookings, etc.</p> <p>This option will enable you to create the session periods you require.</p>
<p>Participant books a selection of sessions for a term</p>	<p>Select this option if you want the participant to book one or more sessions for the duration of a term.</p> <p>This would typically be used for squad training, where the participant selects what days and times they will attend on a weekly basis.</p> <p>The system will then prompt you to set how the fee should be calculated. You can choose to enter a fee manually or you can choose to set an hourly rate that is used by the system to calculate the term fee.</p>

<p>Participant pays for tickets for this event</p>	<p>Select this option if you want the participant to buy tickets for the event.</p> <p>This would typically be used for social events, conferences, etc.</p> <p>This option will enable you to set the ticket prices for individuals and groups for the event.</p>
<p>Participant pays a match fee</p>	<p>Select this option if you want the participant to pay a match fee for each match(session) attended.</p> <p>This would typically be used for club matches, where each session represents a match.</p>

**ADVANCED TAB PAGE**

<p>Comments</p>	<p>Enter any comments you want to add for the event.</p>
<p>Description</p>	<p>Enter a short description for the event.</p>
<p>Age Restriction</p>	<p>You can set an age range for participants booking onto the event.</p> <p>Select APPLY AGE RESTRICTION – the system will then display the AGE RANGE field and the AGE RANGE TYPE field. Set the details as required.</p>
<p>Gender Restriction</p>	<p>You can restrict the gender for participants booking onto the event.</p> <p>Select APPLY GENDER RESTRICTION – the system will then display the</p>

	<p>REQUIRED GENDER field. Select the required gender.</p>
<p>Available for</p>	<p>You can restrict bookings for the event to contacts who belong to a particular contact group.</p> <p>Select APPLY GROUP RESTRICTION – the system will then display the AVAILABLE FOR field. Click on the magnifying glass icon to select the required contact group.</p>
<p>Progress Report</p>	<p>You can produce progress reports for participants booked onto the event. The produced reports can then be accessed by the participants on the customer portal.</p> <p>Select the progress report to link to the event. You can then update the reports for each participant by clicking on the UPDATE PROGRESS REPORTS option in the PARTICIPANT SUMMARY section menu on the EVENT DETAILS page.</p>
<p>Set Access Level</p>	<p>You can restrict access to an event by setting one of five access levels.</p>
<p>Import Code</p>	<p>The IMPORT CODE is used to import event details into the system from an external third-party system.</p> <p>Enter the code required to link to this event.</p>
<p>For Income Category</p>	<p>Income for an event can be assigned to an INCOME CATEGORY.</p>

	Select the required income category.
Add Participants to Group	<p>You can add contacts to a contact group automatically when they book onto the event.</p> <p>Use the magnifying glass icon to select the contact group you want to add the contacts to when they book.</p>
Include on Portal	<p>Tick this field to display the event on the event calendar on the customer portal.</p> <p>If unticked, the event will not be visible to customers on the portals and bookings will only be possible via the backoffice application.</p>
Advert Document	<p>You can display an advert when customers are viewing the event details on the portal.</p> <p>Select the required advert from the dropdown list.</p>
Use an external URL for bookings	TBA
Custom form – user portal	You can prompt the customer to complete a custom form when they book the event on the customer portal by selecting the required form on this field.

## ADD A FEE PAGE

This page is used to add a new participant fee to an event.

You can set up fees for specific membership categories and contact groups/tags and can create discount codes and time limited fees.

You can create an unlimited number of fees for an event – the system will always apply the cheapest fee it can find when a customer wants to book onto the event.

You can set up an appropriate message and action for the customer portal if a customer does not qualify for any of the fees linked to an event.

## DISPLAYING THE PAGE

To display this page:

- Click on the EVENTS option in the main menu - the system will then display the EVENTS menu;
- Click on the FIND AN EVENT option – the system will then display the FIND AN EVENT page;
- Use the criteria to find the event you want to add a fee to – the system will then display the required event in the RESULTS tab page;
- Click on the name of the event – the system will then open the event details on the EVENT DETAILS page;
- Click on the PLUS icon to the right of the FEES section title – the system will then display the ADD NEW FEE page.

## PAGE OVERVIEW

The page consists of three tab pages – the BASIC tab page, the ADVANCED tab page, and the DISCOUNT CODE tab page.

Complete the details as prompted and click on the ADD NEW... button to add your new fee to the event.

## PAGE CONTENTS

### BASIC TAB PAGE

Booking Method	This field displays the setting for the booking method that was set up for the event.
Fee Title	This field enables you to set a title for the fee.
Event Fee	<p>This field enables you to set a single fee for the whole event.</p> <p>It is only displayed when the BOOKING METHOD for the event is set to PARTICIPANT BOOKS THE WHOLE EVENT and the calculation for the fees is set to SINGLE FEE.</p>
Session Fee	<p>This field enables you to set a fee for each session on the event.</p> <p>It is only displayed when the BOOKING METHOD for the event is set to PARTICIPANT BOOKS INDIVIDUAL SESSIONS and the calculation for the fees is set to SINGLE FEE.</p>
Hourly Rate	<p>This field enables you to generate the fee by setting an hourly rate.</p> <p>The hourly rate will then be used to calculate the event/session fee, depending on the duration of the sessions.</p> <p>For example, if you set one session on the event to last an hour and the hourly rate is set to £10, the calculated fee for that session will be £10 x 1 hour = £10. If you then set a second session to be 90 minutes, the calculated fee for that session will be £10 x 1.5 hours = £15.</p>



<p>Enable Pro Rata Pricing</p>	<p>Tick this field if you want the system to pro rata the fee for someone who pays part way through the event.</p> <p>It is only displayed when the BOOKING METHOD for the event is set to PARTICIPANT BOOKS WHOLE EVENT.</p>
<p>Sort Order</p>	<p>This field enables you to order the fees when displayed on the EVENT DETAILS page.</p>
<p>Applicable to</p>	<p>This field enables you to set what types of customers qualify for the fee.</p> <p>Details of the possible values for this field are detailed below in the APPLICABLE TO VALUES section of this manual.</p>

**APPLICABLE TO VALUES**

<p>ALL participants</p>	<p>Set the APPLICABLE TO field to this value if you want the fee to be available to anyone.</p>
<p>Participants in group</p>	<p>Set the APPLICABLE TO field to this value if you want the fee to be available only to participants who are linked to a specific contact group.</p> <p>The system will then prompt you to select the required contact group.</p>
<p>Participants with membership</p>	<p>Set the APPLICABLE TO field to this value if you want the fee to be available only to participants who are members of your organisation.</p>

	<p>The system will then prompt you to select the level of membership required to qualify for the fee.</p>
<p>Participants in group and with membership</p>	<p>Set the APPLICABLE TO field to this value if you want the fee to be available only to participants who are members of your organisation and who are also linked to a specific contact group.</p> <p>The system will then prompt you to select the level of membership required to qualify for the fee and to select the required contact group.</p>

**ADVANCED TAB PAGE**

<p>Fee Description</p>	<p>This field enables you to set a description for the fee for internal use.</p>
<p>Minimum Age</p>	<p>This field enables you to set a minimum age of the participant to qualify for the fee.</p>
<p>Maximum Age</p>	<p>This field enables you to set a maximum age of the participant to qualify for the fee.</p>
<p>Advance Booking Days</p>	<p>This field enables you to set the number of days in advance of the event that the fee is valid for.</p>
<p>Book from Time</p>	<p>This field enables you to set the time of day the fee is valid from on the first day it is valid.</p>

<p>This is a fee for a TRIAL session</p>	<p>Tick this field if this is a trial session fee.</p> <p>The fee will then be marked as a trial fee and will only be made available for booking from the back office application.</p>
<p>Availability</p>	<p>This field enables you to set whether the fee can be booked online on the customer portal and/or whether it can be booked in the back office application.</p>
<p>Available from/to date and time fields</p>	<p>These fields enable you to set when the fee is available.</p>

**DISCOUNT CODES TAB PAGE**

<p>Discount code list</p>	<p>The system displays the current discount codes set up for the fee.</p> <p>If there are none set up, the system displays THERE ARE NO DISCOUNT CODES SET UP FOR THIS FEE and displays a link to enable you to add a discount code.</p>
<p>Click here to add new code</p>	<p>Click this link to display the ADD NEW DISCOUNT CODE screen.</p>

**ADD NEW DISCOUNT CODE SCREEN**

<p>Discount code</p>	<p>This field enables you to enter the code that will be used by participants.</p>
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Discount amount	Enter the amount of the discount.
Type	Select whether the discount amount entered is a percentage or an amount.
Total maximum usage	Enter the total number of times the code can be used.
Maximum usage per person	Enter the total number of times one person can use the discount code.
Valid from/to	Enter the date range that the code will be valid for.
ADD NEW CODE TO FEE button	Click on this button to add the new code to the fee.

## ADD SESSIONS PAGE

This page is used to add one or more sessions to an event.

### DISPLAYING THE PAGE

To display this page:

- Click on the EVENTS option in the main menu - the system will then display the EVENTS menu;
- Click on the FIND AN EVENT option – the system will then display the FIND AN EVENT page;
- Use the criteria to find the event you want to add a session to – the system will then display the required event in the RESULTS tab page;
- Click on the name of the event – the system will then open the event details on the EVENT DETAILS page;
- Click on the PLUS icon to the right of the SESSIONS section title – the system will then display the ADD SESSIONS page.

### PAGE OVERVIEW

The page prompts you to select if you want to add a single session or multiple sessions.

#### SINGLE SESSION

If you select SINGLE SESSION, the system displays a set of fields for you to complete.

Enter the details as prompted and then click on the ADD SESSION TO EVENT button. The session will then be added to the event and the system will then display the event details page.

#### MULTIPLE SESSIONS

If you select MULTIPLE SESSIONS, the page consists of two tab pages – the DETAILS tab page and the RESULTS tab page. The RESULTS tab page is not displayed until such time as you have completed the DETAILS tab page and clicked on the DISPLAY GENERATED SESSIONS button.

Enter the details as prompted and then click on the DISPLAY GENERATED SESSIONS button. The system will then display the sessions that will be created from the details you have entered.

Click on the ADD GENERATED SESSIONS TO EVENT if you are happy with the details displayed. The sessions will then be added to the event and the system will then display the event details page.

## PAGE CONTENTS

### DETAILS TAB PAGE

Sessions to Add	Select whether you want to add a single session or multiple sessions.
Use Event Period	You can use an existing event period to set the start/from dates for creating your sessions.
Start Date	Enter the start date for when you want to create sessions.
Number of Weeks	Enter the number of weeks from the start date that you want to create sessions for. The system will then calculate the finish date.
Finish Date	Enter the finish date for when you want to create sessions.
Contingency Sessions	Enter the number of sessions you want to add as contingency sessions. These are typically set up to cover any main sessions that may be cancelled.
Start Time	Enter the start time of the session.

Finish Time	Enter the finish time of the session.
Description	Enter a description for the generated sessions.
Available Places	Enter the maximum number of places to make available for each session created.
Venue	Enter the venue of the sessions to be created.
Split sessions into contact groups	
User portal text	
Tick the days...	Tick the days you want the system to generate sessions for between the start and the finish date.
Resources to Book	Select the resources you want to book out for the generated sessions.
Resources are not required for these sessions	Tick this field if you do not need to book resources for these sessions.
DISPLAY GENERATES SESSIONS button	Click on this button to generate a list of the sessions that will be created on the RESULTS tab page.

**RESULTS TAB PAGE**

<p>The following session dates will be created...</p>	<p>The system displays a list of the sessions generated by the criteria you have entered.</p> <p>Click on a session date to delete it from the list.</p> <p>Click back to the DETAILS tab if you need to make any adjustments.</p>
<p>The following resources will be booked...</p>	<p>The system displays a list of the resources that will be booked out.</p> <p>Click back to the DETAILS tab if you need to make any adjustments.</p>
<p><b>ADD GENERATED SESSIONS TO EVENT</b> button</p>	<p>Click on this button if you are happy with the details displayed and wish to create the sessions displayed and to book out the resources displayed.</p> <p>The system will then display the event details page with the new sessions listed in the SESSIONS section of the page.</p>



## ADD PERSONNEL PAGE

This page is used to add personnel (coaches, assistants, tutors, helpers, administrators, etc.) to an event.

### DISPLAYING THE PAGE

To display this page:

- Click on the EVENTS option in the main menu - the system will then display the EVENTS menu;
- Click on the FIND AN EVENT option – the system will then display the FIND AN EVENT page;
- Use the criteria to find the event you want to add personnel to – the system will then display the required event in the RESULTS tab page;
- Click on the name of the event – the system will then open the event details on the EVENT DETAILS page;
- Click on the PLUS icon to the right of the PERSONNEL section title – the system will then display the ADD PERSONNEL page.

### PAGE OVERVIEW

The page consists of two sections – a section for selecting the contact to add as personnel to the event, and a section for marking which sessions of the event the contact is allocated to.

Enter the details as prompted and click on the ADD PERSONNEL TO EVENT button. The system will then add the personnel details to the event and redisplay the event on the event details page.

### PAGE CONTENTS

<p>Select Contact Group</p>	<p>Select the contact group that your organisation has set up to identify your personnel.</p>
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	<p>The system will then display a list of the contacts that belong to that group in the SELECT CONTACT field.</p>
Select Contact	<p>Select the contact you want to assign as personnel to the event.</p> <p>The system will then display the remaining personnel fields and prepopulate the fields with the chosen contact's details where relevant.</p>
Standard Rates	<p>This field displays the standard rates set for the chosen contact.</p> <p>Select the required rate if present or you can enter your own rate in the RATE field.</p>
Rate	<p>Enter the rate you want to apply for the selected contact.</p>
Applies to	<p>This field enables you to set how the rate entered will be used to calculate total cost.</p>
Allocated Sessions	<p>This field displays the total number of sessions that have been selected in the SESSIONS ALLOCATED list.</p>
Duration Booked	<p>This field displays the total time booked for the selected contact.</p>
Session Cost	<p>This field displays the total session cost.</p>

<p>Total Cost</p>	<p>This field displays the total cost for all sessions.</p>
<p>Comments</p>	<p>Enter any comments you wish to make.</p>
<p>Sessions Allocated</p>	<p>This list details the sessions for the event. Tick the sessions you want to assign the selected contact to (all sessions are ticked by default).</p> <p>Use the section menu to select/unselect all sessions if required.</p>
<p>ADD PERSONNEL TO EVENT button</p>	<p>Click on this button once you have completed the details as prompted.</p> <p>The system will then save the personnel details to the event and it will then redisplay the event details page.</p>

## ADD BOOKING TO EVENT PAGE

This page is used to add a contact to an event as a participant.

### DISPLAYING THE PAGE

To display this page:

- Click on the EVENTS option in the main menu - the system will then display the EVENTS menu;
- Click on the FIND AN EVENT option – the system will then display the FIND AN EVENT page;
- Use the criteria to find the event you want to add a booking to – the system will then display the required event in the RESULTS tab page;
- Click on the name of the event – the system will then open the event details on the EVENT DETAILS page;
- Click on the PLUS icon to the right of the PARTICIPANT SUMMARY section title – the system will then display the ADD BOOKING page.

### PAGE OVERVIEW

The page consists of two sections – the BOOKING DETAILS section and the SESSIONS section. These are displayed once you have selected the contact that you want to book onto the event.

Complete the details as prompted and then click on the ADD TO CART button. The system will then display the CART page with details of the booking displayed.

Click on the GO TO CHECKOUT button to complete the booking.

### PAGE CONTENTS

#### BOOKING DETAILS SECTION

<p>Search for Contact</p>	<p>This field enables you to select the contact you want to book onto the event.</p> <p>Click on the magnifying glass icon to display the SELECT CONTACT screen, from which you can find and select the required contact.</p> <p>The page will automatically display the SELECT CONTACT screen when first displayed.</p> <p>Once selected, the chosen contact details are displayed in the BOOKED BY and the PARTICIPANT fields.</p>
<p>Booked By</p>	<p>This field displays the contact that is making the booking.</p> <p>Click on the magnifying glass icon to display the SELECT CONTACT screen, from which you can find and select the required contact.</p>
<p>Participant</p>	<p>This field displays the contact that is participating in the event.</p> <p>Click on the magnifying glass icon to display the SELECT CONTACT screen, from which you can find and select the required contact.</p>
<p>Fee</p>	<p>This field displays the qualifying fees for the chosen participant.</p> <p>It will automatically default to the cheapest fee and display the fee amount in the FEE CHARGED field.</p>

<p>Booking Fee</p>	<p>This field enables you to apply a booking fee to the booking. Leave blank if you do not wish to apply a booking fee.</p>
<p>Fee Charged</p>	<p>This field displays the total fee that will be charged for the booking.</p>

**SESSIONS SECTION**

<p>Sessions list</p>	<p>This list displays all of the sessions that the contact will be booked onto for the event.</p> <p>All sessions are selected by default. Untick any that you do not want to book the contact onto.</p>
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## GENERATE TIMESHEETS PAGE

The GENERATE TIMESHEETS page enables your organisation to produce timesheets for personnel who have been assigned to events.

The timesheets include the following:

- What event the person worked on;
- The date, times and duration of the event worked;
- The hours the person worked;
- The rate of pay applied to the work and the total cost;
- An indicator as to whether the event register is open or closed.

Each line displayed in the timesheet relates to a personnel record in an event register, e.g., if an event register has two records of people who worked on the session, there will be two corresponding lines in the timesheet summary.

Each timesheet entry contains a link to the relevant event's register to enable the user to review the details and make any necessary changes.

A report can be generated for the timesheets displayed, which can then be printed or exported in a number of different formats.

## DISPLAYING THE PAGE

To display the GENERATE TIMESHEETS page:

- Click on the EVENTS menu option in the main menu – the system will then display the EVENTS menu options;
- Click on the GENERATE TIMESHEETS option – the system will then display the GENERATE TIMESHEETS page.

## PAGE OVERVIEW

The GENERATE TIMESHEETS page consists of two tab pages, the CRITERIA tab and the RESULTS tab.

You enter the details of what timesheets you want to generate on the CRITERIA tab, e.g., what time period. Once you have completed the details, you click on the GENERATE TIMESHEETS button to generate the timesheets, which are then displayed on the RESULTS tab page.

You can switch between the two tab pages by clicking on the tab title.

Once the timesheets are displayed, you can amend the timesheet details by clicking on the relevant EVENT link – this will take you to that event’s register where you can review and amend personnel details. You can then save the changes and the system will return you to the generated timesheets.

## USING THE CRITERIA TAB PAGE

The CRITERIA tab page consists of the following elements:



FOR CONTACT GROUP	The system displays a list of CONTACT GROUPS that have been marked as PERSONNEL groups – select the required group.
FOR CONTACT	The system displays a list of contacts who belong to the selected contact group – select ALL if you want to display timesheets for everyone in the group, or select the person required from the list.
FOR PERIOD	Select the required period you want the display timesheets for, e.g., LAST CALENDAR WEEK – the system will then add the appropriate dates to the DATE RANGE – FROM and DATE RANGE – TO fields’  Leave this blank if you want to manually enter the DATE RANGE fields.
DATE RANGE – FROM	Enter the FROM date for when you want to generate timesheets – this field will be automatically completed if you select a PERIOD.
DATE RANGE – TO	Enter the TO date for when you want to generate timesheets – this field will be



	<p>automatically completed if you select a PERIOD.</p>
<p>Include OPEN registers</p>	<p>By default, the system displays entries from event registers that have been closed – tick this field to also include entries from registers that are open.</p> <p>This is useful when wanting to estimate the personnel hours/cost of upcoming events.</p>
<p>Exclude PERSONNEL with no work</p>	<p>By default, the system will include ALL contacts who belong to the selected group – if they have not worked in the selected period, the system will display a ‘no sessions found’ message for that person in the summary.</p> <p>Tick this field if you want to exclude such persons from the summary – the system will then only include personnel who have worked during the selected period.</p>
<p>GENERATE TIMESHEETS button</p>	<p>Click on the button to generate the timesheets for the selected criteria you have entered in the other fields.</p> <p>The system will then display the RESULTS tab with details of the generated timesheets.</p> <p>The system will display error messages for any required fields such as the date range fields.</p>

## USING THE RESULTS TAB PAGE

The RESULTS tab page consists of the following elements:

<p>Timesheets table</p>	<p>The system displays the generated timesheets in the TIMESHEET table.</p> <p>The timesheets are displayed in the alphabetical order of the included personnel.</p> <p>Each timesheet has a chevron displayed to the left of the person's name – click on it to hide/display the timesheet contents.</p> <p>The table includes a column called CLOSED REG – this will have a green tick displayed if that event's register is closed or it will have a red cross displayed if that event's register is open.</p> <p>You can display the register for any of the displayed events by clicking on the EVENT column – the system will then display the register which enables you to make any necessary changes to the register contents. Once you have made the necessary changes, the system will then redisplay the timesheets page, including any changes you have made.</p>
<p>Double chevron icon</p> 	<p>The double chevron icon enables you to expand all of the individual timesheets together, rather than clicking on each one.</p>
<p>Print icon</p> 	<p>You can run a report containing all of the displayed timesheet information by clicking on the print icon, displayed to</p>

	<p>the right of the timesheet summary title.</p> <p>The report is displayed in a separate tab of your browser. The report can then be printed or exported in a variety of formats, including PDF and CSV formats.</p> <p>The timesheet details for each person included in the report is displayed on a separate page of the report.</p>
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## COPY AN EVENT PERIOD/TERM PAGE

The COPY AN EVENT PERIOD/TERM function enables you to quickly copy the events within one event period to another. You will also be able to copy any PERSONNEL and RESOURCES to the new events.

### DISPLAYING THE PAGE

To display the COPY AN EVENT PERIOD page:

- Click on the EVENTS menu option in the main menu – the system will then display the EVENTS menu options;
- Click on the SETTINGS option – the system will then display the EVENT SETTINGS page;
- Click on the EVENT PERIOD COPY option – the system will then display the COPY EVENTS BY PERIOD page.

### PAGE OVERVIEW

The COPY EVENTS BY PERIOD page consists of two tab pages, the CRITERIA tab and the RESULTS tab.

When you initially display the page, only the CRITERIA tab will be visible. This is where you will select your copy criteria (the event period you are copying from and to) and whether you want to copy over PERSONNEL and RESOURCE details to the new events.

When you have selected the event period you are copying from, the system will search for events on the system in that time period and display their details on the page.

Please note that only events with the CHARGE TYPE equal to ALL SESSIONS will be displayed. The system does not include any events where the CHARGE TYPE is equal to....

All of the events found will be ticked by default, but if there are any that you do not want to copy to the new time period you can untick them and they will not be included in the copy process.

When selecting which event period you are copying to, the system will check to see if there are any events already in the period you are copying to that match the ones that will be created. DESCRIPTION OF WHAT IT MATCHES ON. If any are found, a message will be shown on

screen, detailing how many matching events were found in the new time period.

When you have set up your copy criteria, click the NEXT button. The system will then display the RESULT tab and display details of the events it will create according to your criteria.

Click on the CREATE EVENTS button if you wish to proceed with the creation of the proposed events. The system will then display the wait cursor whilst it creates the required events. Once the new events have been generated, they will be displayed on screen along with their respective EVENT IDs

If you do not wish to proceed, you can click on the CRITERIA tab and change the details of what you want to create.

## PAGE CONTENTS

The page consists of the following elements:

Copy Events from Period	Select the event period you are copying from – all event periods in the past will be displayed
Copy Events to Period	Select the event period you are copying to – all event periods in the future will be displayed
Copy Personnel to New Events	Tick this field if you want to copy any existing PERSONNEL details to the new events.
Copy Resources to New Events	Tick this field if you want to copy any existing RESOURCES to the new events.

## PROGRESS REPORTS PAGE

This page is used to display a list of the existing progress reports your organisation has added to the system and enables you to open an existing report to view/edit/delete the details.

You can also add a new report from this page.

### DISPLAYING THE PAGE

To display this page:

- Click on the EVENTS option in the main menu - the system will then display the EVENTS menu;
- Click on the PROGRESS REPORTS option – the system will then display the PROGRESS REPORTS page.

### PAGE OVERVIEW

The page consists of a list of progress reports, displayed by progress report category.

Click on a report category to display the reports in that category. Click on a report title to open the selected report – the system will then display the EDIT REPORT DETAILS page (see the ADD NEW PROGRESS REPORT page section for details).

Click on the PLUS icon in the page header to add a new report – the system will then display the ADD NEW PROGRESS REPORT page.

### PAGE CONTENTS

<p>PROGRESS REPORT list</p>	<p>Click on a report category to display the reports in that category.</p> <p>Click on a report title to open the selected report – the system will then display the EDIT REPORT DETAILS page (see the ADD NEW PROGRESS REPORT page section for details).</p>
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## ADD NEW PROGRESS REPORT PAGE

This page is used to add a new progress report. The report can then be linked to an event, from which reports can be produced for the event participants for viewing on the customer portal.

### DISPLAYING THE PAGE

To display this page:

- Click on the EVENTS option in the main menu - the system will then display the EVENTS menu;
- Click on the PROGRESS REPORTS option – the system will then display the PROGRESS REPORTS page;
- Click on the PLUS icon in the page header – the system will then display the ADD NEW PROGRESS REPORT page.

### PAGE OVERVIEW

You are prompted to enter the title of your new report and prompted to select the PROGRESS REPORT CATEGORY you want to link the report to.

Click on the ADD NEW REPORT button – the system will then create the new report and display the EDIT REPORT DETAILS page, on which you can then add the content of your report.

### PAGE CONTENTS

Title	Enter the title of your new report.
Category	<p>A report is linked to a PROGRESS REPORT CATEGORY to make it easier to find a report.</p> <p>Select a category from the existing list of categories or click on the PLUS icon to add a new category.</p>

<p>ADD NEW REPORT button</p>	<p>Click on this button to add your new report to the system.</p>
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## EDIT REPORT DETAILS PAGE

This page is used to edit an existing progress report and can also be used to delete an existing report.

### DISPLAYING THE PAGE

To display this page:

- Click on the EVENTS option in the main menu - the system will then display the EVENTS menu;
- Click on the PROGRESS REPORTS option – the system will then display the PROGRESS REPORTS page;
- Click on the report title you want to edit/delete – the system will then display the EDIT REPORT DETAILS page.

### PAGE OVERVIEW

The page consists of three sections – the REPORT SETTINGS section, the ASSESSMENT GRADES section, and the SECTIONS section.

A report consists of one or more SECTION ITEMS, grouped by SECTION. A report can have one or more ASSESSMENT GRADES, which are used to mark/score the performance of a participant.

Edit the details as prompted and click on the SAVE CHANGES button to save the details. The system will then go back to the PROGRESS REPORTS page.

### PAGE CONTENTS

#### REPORT SETTINGS SECTION

Report Title	Enter the title you want to give your report.
Category	A report is linked to a PROGRESS REPORT CATEGORY to make it easier to find a report.

	Select a category from the existing list of categories or click on the PLUS icon to add a new category.
Header Text	This is the text that is displayed at the top of the report.
Footer Text	This is the text that is displayed at the bottom of the report.

**ASSESSMENT GRADES SECTION**

ASSESSMENT GRADES list	<p>This is a list of the ASSESSMENT GRADES your organisation has added to the report.</p> <p>An ASSESSMENT GRADE is a measure of performance/outcome that you want to use to assess a section item.</p> <p>Typical examples of assessment grades would be the following:</p> <ul style="list-style-type: none"> <li>• Needs improvement</li> <li>• Below average</li> <li>• Average</li> <li>• Good</li> <li>• Excellent</li> </ul> <p>Click on an existing grade title to edit/remove the details.</p> <p>Click on the PLUS icon in the section header to add a new grade.</p>
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**SECTIONS SECTION**

SECTIONS list	<p>This is a list of the SECTIONS and SECTION ITEMS your organisation has added to the current report.</p> <p>A SECTION ITEM is the term we give to the types of assessment you want to measure progress for.</p> <p>For example, if we were running a junior coaching session, we might want to measure different aspects of their behaviour during the lessons.</p> <p>In this case, we would create a SECTION called BEHAVIOUR and might typically create the following SECTION ITEMS as elements of their behaviour we want to measure:</p> <ul style="list-style-type: none"> <li>• Punctuality</li> <li>• Willingness to listen and take instruction</li> <li>• Respectful of coaches and other pupils</li> <li>• Work ethic</li> <li>• Attitude when learning something new</li> </ul> <p>Click on an existing SECTION to edit the section details or to add new section items to the section. The system then displays the EDIT SECTION DETAILS page.</p> <p>Click on the PLUS icon to add a new section and to add new section items to the section. The system then displays the ADD NEW PROGRESS REPORT SECTION page.</p>
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**PAGE MENU**

<p>Display Sample Report</p>	<p>Select this option to produce an example of the report so that you can review the contents and view how it will appear when viewed by a customer.</p> <p>Please note that the sample report opens in a separate browser tab window.</p>
<p>Delete Report</p>	<p>Select this option if you want to delete the report.</p>

## ADD NEW PROGRESS REPORT SECTION PAGE

This page is used to add a new section to a progress report.

### DISPLAYING THE PAGE

To display this page:

- Click on the EVENTS option in the main menu - the system will then display the EVENTS menu;
- Click on the PROGRESS REPORTS option – the system will then display the PROGRESS REPORTS page;
- Click on the report title you want to edit/delete – the system will then display the EDIT REPORT DETAILS page;
- Click on the PLUS icon in the SECTIONS section header – the system will then display the ADD NEW PROGRESS REPORT SECTION page.

### PAGE OVERVIEW

The page consists of two sections – the SECTION SETTINGS section and the SECTION ITEMS section.

Enter the details as prompted in the SECTION SETTINGS section.

Click on the PLUS icon in the SECTION ITEMS section header to add section items to the section.

Click on the ADD NEW SECTION button to add the new section to the report.

### PAGE CONTENTS

For Progress report	This field displays the name of the report you are adding a section to.
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<p>Section Title</p>	<p>Enter the title you want to give to your new section.</p>
<p>Sort Order</p>	<p>Enter the sort order you want to give to the section to determine where it is displayed in a list of the report's sections.</p>
<p>SECTION ITEMS list</p>	<p>This is a list of the section items your organisation has added to the section. The list will of course be empty when you first display the page.</p> <p>Click on the PLUS icon in the section title to add a new section item. Enter the section item title and its sort order and click on the APPLY CHANGES button to add the new item to the section.</p> <p>Click on an existing item to edit the details or to remove it from the section.</p>
<p>ADD NEW SECTION button</p>	<p>Click on the button to add the new section to the current report.</p>

**PAGE MENU**

<p>Delete Section</p>	<p>Select this option to delete the section from the report.</p>
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## UPDATE PROGRESS REPORTS PAGE

This page is used to update the progress reports for participants on an event.

### DISPLAYING THE PAGE

To display this page:

- Click on the EVENTS option in the main menu - the system will then display the EVENTS menu;
- Click on the FIND AN EVENT option – the system will then display the FIND AN EVENT page;
- Use the criteria to find the event you want to update progress reports for – the system will then display the required event in the RESULTS tab page;
- Click on the name of the event – the system will then open the event details on the EVENT DETAILS page;
- Click on the PARTICIPANT SUMMARY section menu and click on the UPDATE PROGRESS REPORTS page – the system will then display the UPDATE PROGRESS REPORTS page.

### PAGE OVERVIEW

The page consists of two tab pages – the PARTICIPANTS tab page and the REPORT tab page.

When you first display the page, the PARTICIPANTS tab page is displayed. Click on a PARTICIPANT to display the REPORT tab page for the selected participant.

Update the report details as required and click on the SAVE REPORT button. The system will save the report details and redisplay the PARTICIPANTS tab page, where you can select the next participant as required.

### PAGE CONTENTS

#### PARTICIPANT TAB PAGE

<p>PARTICIPANTS list</p>	<p>This is a list of the participants on the event.</p> <p>Click on a participant name to display the report details for the selected participant. The system will then display the REPORT tab page.</p>
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**REPORT TAB PAGE**

<p>REPORT section</p>	<p>This section displays the sections and section items for the report that is linked to the event.</p> <p>Click on the GRADE column of a SECTION ITEM to display the EDIT GRADE screen, on which you can set the required grade and can add any comments for the selected item.</p> <p>The EDIT GRADE screen also enables you to set the GRADE for all of the items in a section – click on the UPDATE ALL GRADES IN SECTION button on the EDIT GRADE screen to do so.</p>
<p>SUMMARY comments</p>	<p>Enter the comments you want to display on the report.</p>
<p>REPORT SETTINGS – Mark as COMPLETED</p>	<p>Tick this field to mark the report as completed.</p>
<p>REPORT SETTINGS – Make available to contact</p>	<p>Tick this field to enable the participant (contact) to view the report on the portal when they sign in.</p> <p>The system sends the contact a notification to let them know the report is available for viewing.</p>



	<p>Please note that you cannot make a report available if the MARK AS COMPLETED field is not ticked.</p>
<p>REGISTER NOTES section</p>	<p>The system displays a list of the register notes from the event sessions for the selected participant to assist you in completing the report.</p> <p>You can click on a note to view/edit/delete the details.</p>

# MEMBERSHIP

## INTRODUCTION

The MEMBERSHIP module enables your organisation to;

- Easily set up and manage a membership scheme;
- Enable your organisation to set up any type of membership category, including family and group memberships;
- Enable non-members to take out membership online via the customer portal;
- Enable members to easily manage their membership online via the customer portal;
- Set up discounts as required for family/groups, spouses, children, early payment and loyalty;
- Take payment by debit/credit card and by direct debit;
- Analyse and review budgets and income;
- Track types of members such as new members to enable your organisation to provide tailored services and support;
- Produce a wide variety of reports.

## TERMINOLOGY USED

<p>Membership Scheme</p>	<p>This is the term we use to describe a collection of membership types and their categories.</p> <p>Typically, most organisations will have just one membership scheme.</p>
<p>Membership Type</p>	<p>This is the term we use to describe a collection of membership categories.</p> <p>Typically, the types within a membership scheme will provide a convenient way of describing the</p>

	<p>categories that belong to the type, e.g., Playing, Non-playing, Supporter, etc.</p> <p>Alternatively, some multi-spots clubs might have the different activities provided as their membership types (see the EXAMPLE section below).</p>
Membership Category	<p>This is the term we use to describe each of the different age groups/access levels your organisation may want to have as part of its membership scheme.</p> <p>A membership category will belong to a membership type.</p> <p>Typically, the categories within a membership type will be age and/or access based, e.g., Full adult, Midweek Adult, Under 21, Under 18, Junior, etc.</p>
Rate Period	<p>This is the term we use to describe the fees applicable for a given date range.</p> <p>For example, you could set up a rate period that runs from 1<sup>st</sup> January to the 31<sup>st</sup> December in which you detail the fees for each of the scheme's categories. The system would then use this rate period to find and apply the correct fee to charge a customer.</p>

## EXAMPLES

In development

Membership Type	Membership Categories
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## GETTING STARTED

In development

## ADD A MEMBERSHIP SCHEME PAGE

This page is used to add a new membership scheme. A membership scheme enables you to define the types of membership your organisation offers and it enables you to define the categories of membership you provide for each membership type.

### DISPLAYING THE PAGE

To display this page:

- Click on the MEMBERSHIP option in the main menu - the system will then display the SYSTEM SETTINGS menu;
- Click on the ADD A MEMBERSHIP SCHEME option in the MEMBERSHIP menu – the system will then display the ADD A MEMBERSHIP SCHEME page.

### PAGE OVERVIEW

The page consists of a series of pages that guide you through the requirements for creating a new membership scheme.

Click on the START button to go to the first page of the guide. Complete the details as prompted as you move from page to page. You can navigate forwards and backwards through the guide pages by clicking on the NEXT and PREVIOUS buttons.

Click on the SAVE SCHEME DETAILS button at the end of the guide to create your new membership scheme. The system will then display your new scheme details on the SCHEME DETAILS page.

### PAGE CONTENTS

The page consists of the following pages, linked by navigation buttons:

- Name and Settings page;
- Membership Types & Categories page;
- Fee Types page;
- Payment Types page;
- Scheme Details Completed page.

Each page is detailed below.

## NAME AND SETTINGS PAGE

Scheme Name	Enter the name you want to give to the membership scheme in the SCHEME NAME field, e.g., 'Club Membership'.
Description	Enter a description of what the scheme is in the DESCRIPTION field.
Charging Method	Select the charging method to apply - select FIXED DATE RANGE if each membership in the scheme runs from the same fixed date each year or select ROLLING MEMBERSHIP if each membership starts on the day it is applied for.
Duration	Enter the number of months that each membership runs for by default, e.g., 12 months - this can be amended for individual categories.
Membership Starts On	Set the day and month that membership starts – this is only required if you have selected FIXED DATE RANGE as the CHARGING METHOD.

## MEMBERSHIP TYPES & CATEGORIES PAGE

Membership Types and Categories	<p>The system displays a template set of membership types and categories.</p> <p>Click on an existing entry to amend/delete it. Use the PLUS icons to add a new</p>
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	membership type or a membership category.
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**ADD NEW MEMBERSHIP TYPE SCREEN**

Title	Enter the title you want to give your new type.
Description	Enter the description you want to give your new type.
Closed to new members	<p>Tick this field if your new membership type is closed to new members.</p> <p>This is typically used when you have a historical type that you do not want new members to have access to.</p>
Display order	<p>This enables you to order the display of your membership types.</p> <p>If all membership type display order values are set to zero, the membership types are sorted in alphabetical order.</p>
ADD TO MEMBERSHIP SCHEME button	Click on the button to add your new membership type to the scheme.

**ADD NEW MEMBERSHIP CATEGORY SCREEN**

For Mship Type	Select the membership type you want to add your new membership category to.
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Category Title	Enter the title you would like to give your new category.
Description	Enter the description you would like to give your new category.
Duration	Enter the duration of the category (in months).
Age range	Enter the age range that will be applicable to the category.
ADD CATEGORY button	Click the button to add the new membership category to the scheme.

## FEE TYPES PAGE

Fee Types list	<p>The system displays a list of template fee types.</p> <p>Click on an existing fee type to edit the details.</p> <p>Click on the PLUS icon to add a new fee type to the scheme.</p>
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## ADD NEW FEE TYPE SCREEN

Title	Enter the title you want to give your fee type.
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Active	<p>Tick this field to make the fee type active.</p> <p>Only active fee types are used to process new and renewal memberships.</p>
Apply fee as standard	<p>Tick this field if you want this fee to be applied automatically when a membership is taken out.</p> <p>Untick this field if you want this fee type to be an optional fee type.</p>
Ask for donation	<p>Tick this field if you want the SUGGESTED DONATION page to be displayed to customers when they pay for this fee type.</p>
Apply To	<p>Select to whom this fee should be applied to. You can choose between:</p> <ul style="list-style-type: none"> <li>• New memberships and renewals</li> <li>• New memberships only</li> <li>• Renewals only</li> </ul>
Pro-rata Rate to Apply	<p>Select how the system should apply this fee type if someone joins partway through the fixed period membership year.</p> <p>This field does not apply to a rolling membership scheme.</p>
Display Order	<p>This enables you to order the display of your fee types.</p>

	If all fee type display order values are set to zero, the fee types are sorted in alphabetical order.
ADD TO MEMBERSHIP SCHEME button	Click this button to add the new fee type to the scheme.

**PAYMENT TYPES PAGE**

Payment Types list	<p>The system displays a list of template payment types.</p> <p>Click on an existing payment type to edit the details.</p> <p>Click on the PLUS icon to add a new payment type to the scheme.</p>
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**ADD NEW PAYMENT TYPE SCREEN**

Title	Enter the title you want to give your new payment type.
Description	Enter the description you want to give your new payment type.
Payment Frequency	Select the frequency that payment will be taken for this payment type.
Display Order	This enables you to order the display of your fee types.

	<p>If all fee type display order values are set to zero, the fee types are sorted in alphabetical order.</p>
<p>ADD PAYMENT METHOD button</p>	<p>Click this button to add the new payment type to the scheme.</p>

**SCHEME DETAILS COMPLETED PAGE**

<p>SAVE SCHEME DETAILS button</p>	<p>Click this button to create your new membership scheme.</p> <p>The system will then display the scheme details on the MEMBERSHIP SCHEME DETAILS page.</p>
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## FIND A MEMBERSHIP SCHEME PAGE

This page is used to find a membership scheme on the system.

### DISPLAYING THE PAGE

To display this page:

- Click on the MEMBERSHIP option in the main menu - the system will then display the MEMBERSHIP menu;
- Click on the FIND A MEMBERSHIP SCHEME option – the system will then display the FIND A MEMBERSHIP SCHEME page.

### PAGE OVERVIEW

The page consists of a list of the membership schemes currently created on the system.

Click on a membership scheme title to open that membership scheme's details – the system will then display the scheme details on the MEMBERSHIP SCHEME DETAILS page.

You can create a new scheme from this page by clicking on the PLUS icon on the page header. The system will then display the ADD A MEMBERSHIP SCHEME page.

### PAGE CONTENTS

Scheme list	<p>The system displays a list of the schemes that have been created on the system.</p> <p>Click on a membership scheme title to open that membership scheme's details – the system will then display the scheme details on the MEMBERSHIP SCHEME DETAILS page.</p>
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## MEMBERSHIP SCHEME DETAILS PAGE

This page is used to display the details of a membership scheme.

### DISPLAYING THE PAGE

To display this page:

- Click on the MEMBERSHIP option in the main menu - the system will then display the MEMBERSHIP menu;
- Click on the FIND A MEMBERSHIP SCHEME option – the system will then display the FIND A MEMBERSHIP SCHEME page;
- Click on the title of the scheme you want to display – the system will then open the scheme and display the details on the MEMBERSHIP SCHEME DETAILS page.

### PAGE OVERVIEW

The page consists of a number of sections, each of which can be collapsed/expanded.

Click on the links in each of the sections to update the scheme details as required.

### PAGE CONTENTS

The page contents are displayed by section, as follows:

- Scheme Details section;
- Membership Types and Categories section;
- Payment Types section;
- Fee Types section;
- Fee Discounts section;
- Rate Periods section.

The contents of each section are detailed below.

## SCHEME DETAILS SECTION

The SCHEME DETAILS section displays the general information about the scheme, e.g., ID, title, type, etc.

Click on any of the links to edit the displayed details – the system will then display the EDIT MEMBERSHIP SCHEME page.

Please note the following information on some of the fields/links displayed:

Scheme ID	This is the unique ID allocated to the scheme by the system.
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## MEMBERSHIP TYPES AND CATEGORIES SECTION

The MEMBERSHIP TYPES AND CATEGORIES section displays a list of the current membership types and their categories for the current scheme.

Each membership type has a chevron icon displayed to the left of the title – click on this to expand the list and display the categories for the selected membership type.

You can expand all of the membership types to display all of the categories by clicking on the DOUBLE CHEVRON icon in the section title.

Click on the title of a membership type to view/edit/delete the type details – the system will then display the EDIT MEMBERSHIP TYPE DETAILS screen.

Click on the title of a category to view/edit/delete the category details – the system will then display the details of the selected category on the UPDATE CATEGORY page.

You can add a new membership type by clicking on the PLUS icon in the section title. You can add a new membership type category by clicking on the PLUS icon to the right of the CATEGORY header in the list of categories for a membership type.

## **PAYMENT TYPES SECTION**

The PAYMENT TYPES section displays a list of the payment types for the current scheme.

Click on a payment type to edit the details. Click on the PLUS icon in the section title to add a new payment type.

## **FEE TYPES SECTION**

The FEE TYPES section displays a list of the fee types for the current scheme.

Click on a fee type to edit the details. Click on the PLUS icon in the section title to add a new fee type.

## **FEE DISCOUNTS SECTION**

The FEE DISCOUNTS section displays a list of the fee discounts for the current scheme.

Click on a fee discount to edit the details. Click on the PLUS icon in the section title to add a new fee discount.

## **RATE PERIODS SECTION**

The RATE PERIODS section displays a list of the rate periods for the current scheme.

Click on a rate period to edit the details. Click on the PLUS icon in the section title to add a new rate period.



## ADD A CATEGORY PAGE

This page is used to add a new membership category to an existing membership scheme.

### DISPLAYING THE PAGE

To display this page:

- Click on the MEMBERSHIP option in the main menu - the system will then display the MEMBERSHIP menu;
- Click on the FIND A MEMBERSHIP SCHEME option – the system will then display the FIND A MEMBERSHIP SCHEME page;
- Click on the title of the scheme you want to display – the system will then open the scheme and display the details on the MEMBERSHIP SCHEME DETAILS page;
- Click on the page menu and select the ADD CATEGORY option – the system will then display the ADD NEW MEMBERSHIP CATEGORY page.

### PAGE OVERVIEW

The page consists of two tab pages – the BASIC tab page and the ADVANCED tab page.

Enter the details as prompted and click on the ADD TO MEMBERSHIP SCHEME button to add the new category to the scheme. The system will validate the details entered and inform you of any errors.

### PAGE CONTENTS

Details of the fields on this page are detailed below by tab page.

#### BASIC TAB PAGE

The BASIC tab page consists of three sections – the SUMMARY section, the SETTINGS section, and the AGE RANGE section.

##### Summary Section

Membership Type	Select the membership type you want to link the new category to.
This is a GROUP category	Tick this field if the new category is for a group membership.
Category Title	Enter the title you want to give the category.
Description	Enter the description you want to give the category.
Link Fees To	<p>You can link a category's fees to an existing category, for example where the fees will not be different, or where the fees for your new category will be a percentage difference of another category.</p> <p>Select the category you want to link to, if applicable.</p>
Valid For	Enter the number of months the category membership will be valid for.
Membership expires on last day of month	<p>Tick this box if you want memberships for the category to all expire at the end of the month they are due to expire in.</p> <p>This field is only applicable for rolling date memberships.</p>

### Settings Section

Active	<p>Tick this field to mark the category as an active category, i.e., one that is made available to customers.</p>
Available Online	<p>Tick this field to make the category available to customers on the customer portal.</p> <p>If not ticked, the category will only be available in the back office application.</p>
Closed to New members	<p>Tick this field if the category is not to be made available for new memberships.</p> <p>This is typically used when setting up historic categories.</p>
Organisation Membership	<p>Tick this field if the category is open to organisations only, e.g., corporate membership.</p>
Renewal Requires Approval	<p>Tick this field if anyone renewing this category must be vetted before the renewal is approved.</p> <p>This is typically used where there are qualifying conditions for a category membership that need to be manually checked.</p>
EMAIL SETTINGS – New Membership	<p>The system will send an automatic email when anyone takes out membership for the category.</p> <p>This field enables you to select the document that should be used for the email.</p>

<p>EMAIL SETTINGS – Renew Membership</p>	<p>The system will send an automatic email when anyone renews membership for the category.</p> <p>This field enables you to select the document that should be used for the email.</p>
<p>SYSTEM SETTINGS – Add New Member to Group</p>	<p>You can automatically add someone who takes out membership for the category to a contact group.</p> <p>Click on the field to select the group, if required.</p>
<p>SYSTEM SETTINGS – Custom Signup Form</p>	<p>You can display a custom form to the customer when they select the category for new membership.</p> <p>Click here to select the form, if required.</p>
<p>SYSTEM SETTINGS – For Income Category</p>	<p>Select the income category that any payments for the category should be assigned to.</p>
<p>SYSTEM SETTINGS – Sort Order</p>	<p>Enter the sort order number to sort the category.</p>
<p>SYSTEM SETTINGS – Import Category Title</p>	<p>You can assign the category to contacts that you import using the IMPORT CONTACT DATA page.</p> <p>This field enables you to enter a short code/name to use in your import so that you do not have to use the full name of the category.</p>

Age Range Section

For Ages	Enter the age range for the category, e.g., if this category is for under 12 years old children, enter a range of 0 to 11.
For Age Group	You can mark the category as an ADULT category or a CHILD category. This is used for group membership categories where they are made up of a number of adult categories and a number of child categories.
Show Parental Consent Checkbox	Tick this field if the category will require parental consent.
Ask for Parental Consent if Age Less Than	Enter the age below which the system will require parental consent.

## ADVANCED TAB PAGE

The ADVANCED tab page consists of three sections, as follows:

- Excluded Activities section;
- Excluded Day/Times section;
- Booking Rules section.

Details of the fields on this page are detailed below by section.

## EXCLUDED ACTIVITIES SECTION

This section enables your organisation to exclude a range of activities from members of the category.

This is particularly useful if you have a category that does not allow the member to participate in all of the activities within the organisation – you can specify those excluded activities in this section.

<p>Excluded Activities list</p>	<p>The system will display the excluded activities in a list in this section.</p> <p>Click on the PLUS icon in the section title to add a new excluded activity – the system will then display the ADD NEW ACTIVITY EXCLUSION screen.</p> <p>Click on an existing excluded activity to edit/delete the exclusion.</p>
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## EXCLUDED DAY/TIMES SECTION

This section enables your organisation to exclude a range of days and times from members of the category.

This is particularly useful if you have a category that does not allow the member to use the organisation’s facilities at all times – you can specify the days and times they cannot access in this section.

<p>Excluded Day/Times list</p>	<p>The system will display the excluded days and times in a list in this section.</p> <p>Click on the PLUS icon in the section title to add a new excluded day/time – the system will then display the ADD NEW DAY/TIME EXCLUSION screen.</p> <p>Click on an existing excluded day/time to edit/delete the exclusion.</p>
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## BOOKING RULES SECTION

This section enables your organisation to create a set of booking rules for the category, e.g., your organisation may only allow members of the category to book classes seven days in advance.

<p>Booking Rules list</p>	<p>The system will display the booking rules in a list in this section.</p>
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	<p>Click on the PLUS icon in the section title to add a new booking rule – the system will then display the ADD NEW BOOKING RULE screen.</p> <p>Click on an existing booking rule to edit/delete the rule.</p>
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## ADD NEW RATE PERIOD PAGE

This page is used to add a new rate period to a membership scheme.

An alternative to creating a new rate period from scratch is to copy an existing rate period, as follows:

- Click on an existing rate period – the system will then display the EDIT RATE PERIOD page;
- Click on the page menu and select the COPY RATE PERIOD option – the system will then display the COPY RATE PERIOD screen;
- Enter the details as required – the system will then create a copy of the rate period for you to update as required.

## DISPLAYING THE PAGE

To display this page:

- Click on the MEMBERSHIP option in the main menu - the system will then display the MEMBERSHIP menu;
- Click on the FIND A MEMBERSHIP SCHEME option – the system will then display the FIND A MEMBERSHIP SCHEME page;
- Click on the title of the scheme you want to display – the system will then open the scheme and display the details on the MEMBERSHIP SCHEME DETAILS page;
- Click on the PLUS icon in the RATE PERIODS section title – the system will then display the ADD NEW RATE PERIOD page.

## PAGE OVERVIEW

The page consists of a set of fields and a list of the membership categories (by membership type).

Enter the details as prompted and click on the fees to add/update as required.

Click on the ADD TO MEMBERSHIP SCHEME button to add the new rate period to the scheme. The system will then redisplay the SCHEME DETAILS page.



**PAGE CONTENTS**

Period Title	Enter a title for the rate period, e.g., "2022 Rates".
Start Date	Enter the date from which the fees will be applied by the system.
Finish Date	Enter the date until when the fees will be applied by the system.
Days before start to become default	Enter the number of days before the start date when the system should use the rate period for new members/renewals.
Rates for this Period list	<p>The system lists the current membership categories (by membership type) and details the fees applicable for each of the fee types set up for the scheme.</p> <p>Click on a fee amount to update the details. The system will enable you to copy the amount you enter to the other categories in that membership type, if required.</p>
ADD TO MEMBERSHIP SCHEME button	Click on the button to add the new rate period to the scheme.

# PROJECT PLANS

## INTRODUCTION

The PROJECT PLANS module enables your organisation to:

- Create and manage an unlimited number of project plans;
- Create and track objectives and actions and assign said actions to contacts both within and outside of your organisation;
- Send out automated emails with project updates for assigned people, with the ability for said people to update progress on their project actions without having to log into the system;
- Create customised Club Development Plans if your organisation is a sports club;
- Attach documents and files to a project and run reports on progress.

## STRUCTURE OF A PROJECT PLAN

A project plan is typically made up of the following:

- A VISION statement - a description of where your organisation wants to be and what it hopes to achieve by a particular date;
- One or more AIMS - these will provide more specific details on what your organisation will do to satisfy its VISION statement;
- One or more OBJECTIVES - specific statement that outlines what steps will be taken by your organisation to achieve one or more of the stated aims;
- One or more ACTIONS for each OBJECTIVE - these detail what will be done, by whom, and when, to achieve the objectives.

## TERMINOLOGY USED

Vision	<p>This is the term we use to describe where the club wants to be and what it hopes to achieve by the end of a project plan period, for example:</p> <p><b><i>'Anytown Sport Club is committed to</i></b></p>
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	<p><b><i>providing the best possible environment for our members to reach their maximum playing potential through excellence in coaching and support'</i></b></p> <p>It should be used to ensure that objectives and actions you add to a project plan are focused on enabling the organisation to achieve the vision statement.</p>
Aim	<p>This is the term we use to describe the specific details on what the club will do to satisfy its VISION statement, for example:</p> <p><b><i>'We will provide weekly internal training and competition opportunities for our members'</i></b></p> <p><b><i>'We will support our coaches to achieve their potential both via opportunities and funding'</i></b></p>
Objective	<p>This is the term we use to describe a specific statement that outlines what steps will be taken to achieve one or more of the stated aims of the organisation, for example:</p> <p><b><i>"Set up and run a weekly training session on Tuesday and Thursday evening for juniors"</i></b></p> <p>An objective should be specific and measurable, e.g., the above objective will be met if sessions are set up and maintained on the specified days.</p>
Action	<p>This is the term we use to describe the specific tasks that will be undertaken to achieve an objective, for example:</p> <p><b><i>"Contact leisure centre to book Tuesday evening for juniors"</i></b></p>

	<p>Actions are typically assigned to individuals and given a target date for completion.</p>
Phase	<p>This is the term we use to describe a time period that can be assigned to one or more actions.</p> <p>This is typically used when a project is split into distinct periods or when a project's objectives need to be linked to specific release dates.</p>
Action tag	<p>This is the term we use to describe a flag/indicator that you can create and assign to one or more actions.</p> <p>You can use this to group actions if required.</p>

## GETTING STARTED

In development

## FIND A PROJECT PLAN PAGE

This page is used to find an existing project plan on the system and open the details for editing.

### DISPLAYING THE PAGE

To display this page:

- Click on the PROJECT PLANS option in the main menu - the system will then display the PROJECT PLANS menu;
- Click on the FIND A PROJECT PLAN option – the system will then display the FIND A PROJECT PLAN page.

### PAGE OVERVIEW

The page consists of a list of the current project plans on the system, grouped by project category.

Click on a category to display the project plans assigned to that category.

Use the double chevron icon to expand all categories and display all of the project plans.

Click on the PLUS icon in the page header if you want to create a new project plan – the system will then display the ADD NEW PROJECT PLAN page.

### PAGE CONTENTS

Project plan list	<p>Project plans are displayed by project category.</p> <p>Click on a category to display the project plans assigned to that category.</p> <p>Click on a project plan title to open the plan details on the PROJECT PLAN DETAILS page.</p>
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## ADD NEW PROJECT PLAN PAGE

This page is used to add a new project plan to the system.

### DISPLAYING THE PAGE

To display this page:

- Click on the PROJECT PLANS option in the main menu - the system will then display the PROJECT PLANS menu;
- Select the ADD NEW PROJECT PLAN option – the system will then display the ADD NEW PROJECT PLAN page.

### PAGE OVERVIEW

The page consists of a number of fields for you to complete as required.

Click on the ADD NEW PROJECT PLAN button to create the new project plan on the system.

### PAGE CONTENTS

Project Title	Enter the title you want to assign to this plan.
Description	Enter a description if required.
Vision	Enter the vision statement for the project plan if required.
Category	Projects are displayed on the FIND A PROJECT page by category. Select the required category or click on the PLUS icon to add a new project category.

Start Date	Enter the start date for the project.
Target Finish Date	Enter the target finish date for the project.
Send Email Notifications	<p>The system can send email notifications to contacts who have been assigned actions in the project.</p> <p>Select the frequency of the emails from the available options.</p> <p>Select DO NOT SEND if you do not want the system to send these emails.</p>
This is the club's current development plan	<p>Tick this field if the current plan is the current club development plan.</p> <p>This is only applicable for clubs who have been assigned a ClubServe licence by their governing body.</p> <p>This flag is used by the system to identify the current club development plan when adding in suggested objectives generated by the club reviews.</p>
Display PHASES for this plan	Tick this field if you want to display and utilise phases for this plan.
Display AIMS for this plan	Tick this field if you want to display and utilise aims for this plan.
Restrict access to named project users only	Tick this field if you want to restrict access to the project plan only to those who have been assigned at least one action.



Assign any new action to the current user	Tick this field if you want the current user to be assigned to any actions created by that user by default.
Objective Alias	You can opt to use a different word instead of OBJECTIVE – type in your alternative in this field.
Phase Alias	You can opt to use a different word instead of PHASE – type in your alternative in this field.
ADD NEW PROJECT PLAN button	Click this button to create your new project plan. The system will then create the plan and display the details on the PROJECT PLAN DETAILS page.

## PROJECT DETAILS PAGE

This page is used to display and manage a project plan.

### DISPLAYING THE PAGE

To display this page:

- Click on the PROJECT PLANS option in the main menu - the system will then display the PROJECT PLANS menu;
- Click on the FIND A PROJECT PLAN option – the system will then display the FIND A PROJECT PLAN page;
- Click on the category of the project you want to display – the system will then display the projects in that category;
- Click on the project title – the system will then display the PROJECT PLAN DETAILS page.

### PAGE OVERVIEW

This page consists of three tab pages – the DASHBOARD tab page, the SUMMARY tab page, and the ACTION LIST tab page.

The DASHBOARD tab page displays statistics on your project such as an analysis of actions by RAG rating and category.

The SUMMARY tab page displays the project summary and objectives.

The ACTION LIST tab page displays a list of actions for the project.

### PAGE CONTENTS

#### SUMMARY TAB PAGE

<p>SUMMARY section</p>	<p>The SUMMARY section displays a list of key project details such as project ID and duration.</p> <p>Click on any of the field titles to edit the summary details – the system will then display the EDIT PROJECT DETAILS page.</p>
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<p>AIMS section</p>	<p>The AIMS section displays the aims that have been added to the project by your organisation.</p> <p><b>This section is only displayed if the DISPLAY AIMS FOR THIS PLAN field on the EDIT PROJECT DETAILS page has been ticked.</b></p> <p>Click on the PLUS icon in the section title to add a new aim – the system will then display the ADD NEW AIM screen.</p> <p>Click on an existing aim to edit/delete the aim details.</p>
<p>OBJECTIVES section</p>	<p>The OBJECTIVES section displays the project objectives that have been added to the project by your organisation.</p> <p>Objectives are listed by objective category.</p> <p>Click on the PLUS icon in the section title to add a new objective – the system will then display the ADD NEW OBJECTIVE page.</p> <p>Click on an existing aim to edit/delete the aim details.</p>
<p>SUGGESTED OBJECTIVES section</p>	<p>The SUGGESTED OBJECTIVES section displays objectives that have been generated by the system as a result of your organisation’s answers to the club reviews.</p> <p><b>This section is only displayed if there are suggested objectives to display.</b></p> <p>Your organisation can decide to move these into the project as objectives, or can decide to delete them from the project.</p> <p>Click on a suggested objective title to move the objective into the plan or to</p>

	<p>delete it from the project. If moved into the plan, the objective will be added to the OBJECTIVES section.</p> <p>You can move all of the suggested objectives listed by clicking on the section menu and selecting the MOVE ALL INTO PLAN option.</p> <p>You can delete all of the suggested objectives listed by clicking on the section menu and selecting the DELETE ALL FROM PLAN option.</p>
<p>PHASES section</p>	<p>The PHASES section displays the phases that have been added to the project by your organisation.</p> <p><b>This section is only displayed if the DISPLAY PHASES FOR THIS PLAN field on the EDIT PROJECT DETAILS page has been ticked.</b></p> <p>Click on the PLUS icon in the section title to add a new phase – the system will then display the ADD NEW PHASE screen.</p> <p>Click on an existing phase to edit/delete the phase details.</p>
<p>PROJECT TAGS section</p>	<p>The PROJECT TAGS section displays the tags that have been add to the project by your organisation.</p> <p><b>This section is only displayed if your organisation has created at least one tag for the project.</b> You can add tags to a project from the ADD NEW OBJECTIVE ACTION page.</p> <p>Click on the PLUS icon in the section title to add a new tag – the system will then display the ADD NEW TAG screen.</p>

	Click on an existing tag to edit/delete the phase details.
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### ACTION LIST TAB PAGE

Action list	<p>The current actions for all objectives are displayed on the action list tab page.</p> <p>Click on an action to open the selected action – the system will then display the EDIT ACTION DETAILS page.</p> <p>You can change/filter the actions displayed by clicking on the DISPLAYING filter row, as required.</p> <p>Click on the PLUS icon in the ACTION LIST section header to add a new action – the system will then display the ADD NEW OBJECTIVE ACTION page.</p> <p>Click on the EDIT icon to the right of the PLUS icon to change the columns that are displayed on the page.</p>
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### PAGE MENU

Add Category	Select this option to add a new objective category to the project plan.
Add Objective	Select this option to add a new objective to the project plan.
Add to Favourites	Select this option to add the project to your personal FAVOURITES list.

Remove from Favourites	Select this option to remove the project from your personal FAVOURITES list.
Email Notifications	Select this option if you want to send email notifications to those assigned to actions.  You can send notifications for actions with a particular status and you can also select a particular contact to notify.
Run Report	Select this option to display the RUN REPORT screen, from which you can run an action list report.
Copy Project	Select this option if you want to copy the project – the system will then display the COPY PROJECT screen.  You are then prompted to enter a title for the copy and to click on the COPY PROJECT button to create the copy.
Delete Project	Select this option if you want to delete the project.

## ADD NEW OBJECTIVE ACTION PAGE

This page is used to add a new action to an existing project plan objective.

### DISPLAYING THE PAGE

To display this page:

- Click on the PROJECT PLANS option in the main menu - the system will then display the PROJECT PLANS menu;
- Click on the FIND A PROJECT PLAN option – the system will then display the FIND A PROJECT PLAN page;
- Click on the category of the project you want to display – the system will then display the projects in that category;
- Click on the project title – the system will then display the PROJECT PLAN DETAILS page;
- Click on the ACTION LIST tab – the system will then display the ACTION LIST;
- Click on the PLUS icon in the ACTION LIST section header – the system will then display the ADD NEW OBJECTIVE ACTION page.

### PAGE OVERVIEW

The page consists of three tab pages – the DETAILS tab page, the TAGS tab page, and the UPDATES tag page.

### PAGE CONTENTS

#### DETAILS TAB PAGE

Description	Enter the action details.
Start Date	Enter the start date.

Duration	<p>You can use the DURATION field to calculate the target finish date.</p> <p>Click on the required duration and the system will then set the appropriate target finish date.</p>
Target Date	<p>Enter the required target finish date or use the DURATION field to calculate the target date.</p>
Status	<p>An action can be set to one of four STATUS values:</p> <ul style="list-style-type: none"> <li>• Pending</li> <li>• In progress</li> <li>• Under Review</li> <li>• Completed</li> </ul> <p>Select the required value.</p>
RAG Rating	<p>Select the required RAG rating, if required.</p>
Comments	<p>Enter any required comments.</p>
For Project Objective	<p>Select the objective you want to link the action to.</p>
Assign to Contact	<p>Select the contact you want to assign to the action by clicking on the magnifying glass icon.</p>



<p>Priority Rating</p>	<p>You can assign a priority rating to an action to enable you to prioritise actions.</p> <p>Enter a value between 0 and 999.</p>
<p>Click <a href="#">HERE</a> to mark as top priority</p>	<p>You can mark an action as high priority by clicking on the <a href="#">CLICK HERE TO MARK AS TOP PRIORITY</a> link. The system will then set the priority rating field to 900.</p>
<p><a href="#">SAVE AS NEW OBJECTIVE ACTION</a> button</p>	<p>Click this button to save the action details. The system validates the data entered and will report on any errors.</p> <p>If there are no errors, the action is saved and the system will then redisplay the <a href="#">ACTION LIST TAB</a> page on the <a href="#">PROJECT DETAILS</a> page.</p>
<p><a href="#">SAVE AND ADD ANOTHER</a> button</p>	<p>Click this button to save the action details. The system validates the data entered and will report on any errors.</p> <p>If there are no errors, the action is saved and the system will then redisplay the <a href="#">ADD NEW OBJECTIVE ACTION</a> page to enable you to add another action.</p>

**TAGS TAB PAGE**

<p>Tags list</p>	<p>The system displays a list of the action tags that have been created by your organisation for the project, together with a checkbox for each tag. Tick the tag(s) that you want to link the action to.</p> <p>Click on the PLUS icon in the section menu to add a new tag – the system will then display the <a href="#">ADD NEW TAG</a> screen.</p>
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	<p>If you want to amend/delete a tag from the project, navigate back to the PROJECT DETAILS page and click on the tag you want to delete in the PROJECT TAGS section of the page.</p>
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**UPDATES TAB PAGE**

<p>Updates list</p>	<p>The system displays a list of the updates that have been added to the action by your organisation.</p> <p>Click on the PLUS icon in the section menu to add a new update – the system will then display the ADD NEW UPDATE screen.</p> <p>Click on an existing update to amend/delete the update from the action – the system will then display the EDIT UPDATE screen.</p>
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## UPDATING A PROJECT ACTION

Contacts assigned to an action within a project plan can update a project action in one of two ways:

- Opening the project in ClubServe and adding an update;
- Clicking on the link provided in a YOUR PROJECT ACTION SUMMARY email.

### UPDATING BY OPENING THE PROJECT

To update an action by opening the project in ClubServe:

- Click on the PROJECT PLANS option in the main menu - the system will then display the PROJECT PLANS menu;
- Click on the FIND A PROJECT PLAN option – the system will then display the FIND A PROJECT PLAN page;
- Click on the category of the project you want to display – the system will then display the projects in that category;
- Click on the project title – the system will then display the PROJECT PLAN DETAILS page;
- Click on the ACTION LIST tab – the system will then display the ACTION LIST;
- Click on the action you want to update – the system will then display the EDIT OBJECTIVE ACTION page;
- Click on the UPDATES tab page and click on the PLUS icon in the section header – the system will then display the ADD NEW UPDATE screen;
- Enter the details of your update and click on the ADD NEW UPDATE button – the system will then save your update.

### UPDATING BY EMAIL LINK

The YOUR PROJECT ACTION SUMMARY email is generated by the system as follows:

- Click on the PROJECT PLANS option in the main menu - the system will then display the PROJECT PLANS menu;

- Click on the FIND A PROJECT PLAN option – the system will then display the FIND A PROJECT PLAN page;
- Click on the category of the project you want to display – the system will then display the projects in that category;
- Click on the project title – the system will then display the PROJECT PLAN DETAILS page;
- Click on the page menu and select the EMAIL NOTIFICATIONS option – the system then displays the SEND EMAIL NOTIFICATIONS screen;
- Select the types of action you want to notify by email and click on the SEND NOTIFICATIONS button – the system will then send the email notifications to the contacts assigned to the chosen actions.

To update an action by clicking on a link in the YOUR PROJECT ACTION SUMMARY email;

- Click on the CLICK HERE TO ADD AN UPDATE FOR THIS ACTION link for the required action in the email – the system then displays the ADD A PROJECT ACTION UPDATE page;
- Enter the update details and click on the SAVE UPDATE DETAILS – the system will then save the update and confirm this has been completed.

# RESOURCES

## INTRODUCTION

The RESOURCES module enables your organisation to;

- Set up and manage any type of resource that you want customers to book, such as courts, pitches, lanes, rooms, equipment, etc.;
- Create any length of booking period, e.g., one hour, 90 minutes, etc.;
- Enable members and non-members to book resources online via the customer portal, for themselves and anyone associated with them such as children and spouses;
- Set up different types of fees and payment options, including peak, off-peak, etc.;
- Set up booking and pricing rules, including provision for limiting the number of bookings made by membership category;
- Require customers to provide details of who they are playing with;
- Mark resources as unavailable, e.g.; for maintenance.

## TERMINOLOGY USED

Resource	This is the term we use to describe a physical entity that your organisation makes available to be booked out, e.g., a court, pitch, swimming/track lane, ball machine, meeting room, etc.
Rate Period	This is the term we use to describe a date/time range that details the costs for something, e.g., to book a resource, take out membership, etc.
Resource Profile	

Unavailability Period	This is the term we use to describe a date/time range in which you can identify resources that will not be available, e.g., you create an unavailability period for every Sunday morning for a meeting room.
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## GETTING STARTED

In development

# RESOURCE LIBRARY



## INTRODUCTION

This module provides your organisation with access to a wide range of resources provided to you by your governing body.

**This module is only available to sports clubs that access the system using a licence provided to them by their governing body.**

## RESOURCE LIBRARY PAGE

This page is used to access the resources provided to your organisation by your governing body.

### DISPLAYING THE PAGE

To display this page:

- Click on the RESOURCE LIBRARY option in the main menu - the system will then display the RESOURCE LIBRARY CATEGORIES page.

### PAGE OVERVIEW

Resources are accessed by selecting the required category on the RESOURCE LIBRARY CATEGORIES page. The system then displays the sections within that category.

Click on the required section to display the resources in that section. You can then click on the required resource to view/download the resource.

# SYSTEM SETTINGS

## INTRODUCTION

This module enables your organisation is customise the system to your specific requirements.

## YOUR ORGANISATION SETTINGS PAGE

This page is used to set organisation settings such as:

- Email
- Finance
- Legal and Governance
- Logos
- Name and Address
- Google Maps Location

### DISPLAYING THE PAGE

To display the page:

- Click on the SYSTEM SETTINGS option in the main menu and select the YOUR ORGANISATION SETTINGS option – the system will then display the ORGANISATION SETTINGS page.

### PAGE OVERVIEW

The page is split into a number of sections, each represented by a coloured bar.

Click on the bar to expand/collapse the section.

### EMAIL

The EMAIL section is where you enter the details of the email settings you want to use for outgoing emails.

The system sends two types of email:

- SYSTEM EMAIL – these are emails sent by the system automatically, e.g., registration confirmations, booking confirmations, invoices, etc.;

- BULK EMAIL – these are emails sent by the system that are generated by the user and sent to multiple recipients, e.g., marketing emails, newsletters, etc.

**SYSTEM EMAIL**

System emails can be sent from either the default ‘no-reply@clubserve.net’ email address or from your own email account.

Select which option you require by clicking on the SEND FROM field in the MALBOX SETTINGS FOR SYSTEM EMAIL section.

**BULK EMAIL**

Bulk emails can be sent from either the default ‘no-reply@clubserve.net’ email address or from your own email account.

Select which option you require by clicking on the SEND FROM field in the MALBOX SETTINGS FOR BULK EMAIL section.

**EMAIL FIELDS**

Test Mode

<p>Send all emails in test mode</p>	<p>Tick this field if you want all emails generated by the system to be sent to one email address.</p> <p>The system will prompt for the email address to send all emails to when the field is ticked.</p> <p>This TEST option is typically used when first setting up the system so that your organisation can review/test the email functionality.</p>
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Mailbox Settings for System Email

<p>Email Name</p>	<p>Enter the name that you want the system to use as the sender name for all system emails.</p>
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	This will typically be the organisation name.
Send From	<p>Select which of two options you want to use for sending system emails:</p> <ul style="list-style-type: none"> <li>• <a href="mailto:noreply@clubserve.net">noreply@clubserve.net</a> – this is the default account;</li> <li>• OUR OWN EMAIL ACCOUNT – select this option if you want to use your own email account to send system emails.</li> </ul> <p>If you select OUR OWN EMAIL ACCOUNT, the system will then display the required email setting fields for you to enter for your own email account.</p>
Email address	This is the address that will be used by the system as the FROM address for any system emails sent by the system
BULK EMAIL – SMTP Server, User Name, and Password	These are the SMTP settings provided by your email provider

#### Mailbox Settings for Bulk Email

Email Name	<p>Enter the name that you want the system to use as the sender name for all system emails.</p> <p>This will typically be the organisation name.</p>
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Send From	<p>Select which of two options you want to use for sending bulk emails:</p> <ul style="list-style-type: none"> <li>• <a href="mailto:noreply@clubserve.net">noreply@clubserve.net</a> – this is the default account;</li> <li>• OUR OWN EMAIL ACCOUNT – select this option if you want to use your own email account to send bulk emails.</li> </ul> <p>If you select OUR OWN EMAIL ACCOUNT, the system will then display the required email setting fields for you to enter for your own email account.</p>
SMTP Server, User Name, Password and Port	These are the SMTP settings provided by your email provider
Send Secure Email	Tick this if your email provider requires SSL authentication for emails sent from the system
Send email in test mode	Tick this if you don't want emails to be physically sent from the system – this is typically used when testing system functionality
Emails per batch / Delay per batch	<p>Enter the number of emails the system should send at any one time (batch) and how many minutes the system should wait before sending the next batch.</p> <p>These fields should be used to minimise the possibility of your email provider blocking your account because you are sending too many emails at the same time. Please note that this will not be needed if you are using a mail</p>



	<p>service such as Mailchimp for your bulk emails.</p> <p>Clubserve will use the values entered to send your emails in batches. For example, if you set the number of emails to be sent in one batch to 100 and you set the delay to 10 minutes, the system will then send 100 emails every 10 minutes until all of your emails are sent.</p>
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## FINANCE SETTINGS

Click on the FINANCE section to expand the section and display the finance fields.

### FINANCE FIELDS

Accounting Method	Enter the type of accounting method your organisation uses – CASH or ACCRUAL
Year End	Select the day and month of your organisation's year end
Current Year End	Enter the end date of the current financial year end
Member % as Default	<p>Enter the percentage of income that should be assumed to be member income by default, e.g., enter 100% if all of your income comes from members of the organisation.</p> <p>NOTE – this is only relevant if your organisation is non profit-making</p>

Organisation is VAT Registered	Tick this field if the organisation is VAT registered and you therefore want to record the amount of VAT incurred on transactions/invoices.
First Quarter Start Date	Select the day and month of the first quarter VAT return for your organisation.
Registered for Cash Accounting	Tick this field if your organisation is registered for the HMRC cash accounting scheme.
Registered for Flat Rate Scheme	Tick this field if your organisation is registered for the HMRC flat rate scheme.
Flat Rate %	Enter the percentage of the organisation's flat rate if the organisation is registered for the HMRC flat rate scheme.

## LEGAL AND GOVERNANCE

Click on the LEGAL AND GOVERNANCE section title to expand the section and display the fields.

### LEGAL AND GOVERNANCE FIELDS

Legal Status	Select the legal status of the organisation – this will enable the system to determine what income is/isn't taxable.
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Not for Profit	Tick this field if your organisation is a 'not for profit' organisation - this will enable the system to determine what income is/isn't taxable.
Registered as CASC	Tick this field if your organisation is registered with HMRC as a Community Amateur Sports Club - this will enable the system to determine what income is/isn't taxable.
Registered as Charity	Tick this field if your organisation is registered as a charity - this will enable the system to determine what income is/isn't taxable.
Registered for Gift Aid	Tick this field if your organisation is registered with HMRC for the Gift Aid Scheme.

## LOGOS

Click on the LOGOS section to expand the section and display the Logo fields.

### LOGO FIELDS

Logo displayed in the page header of every page	<p>This field enables you to change the logo that is displayed in the PAGE HEADER area of each page on the system.</p> <p>The current logo is displayed on a blue background that is the same colour as the page header.</p>
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	<p>Click on the logo to upload a new logo – the system will then display the UPLOAD PAGE HEADER LOGO screen.</p> <p>Click on the CLICK HERE TO SELECT THE IMAGE TO BE USED link – the system will then prompt you to select the image you want to use for your logo.</p> <p>Select the required image – the system will then display the logo on the page.</p> <p>Click on the SAVE CHANGES button to save the details of the new logo.</p> <p><b>PLEASE NOTE</b></p> <p><b>Uploaded file must be in PNG format and we recommend that the image has a transparent background.</b></p> <p><b>You may need to refresh/clear browsing data and/or sign out/sign in once you have changed the logo for any changes to take effect.</b></p> <p><b>CLEARING BROWSER DATA IN CHROME</b></p> <p>To clear browsing data in Chrome:</p> <ul style="list-style-type: none"><li>• Click on the menu option in the top right hand corner of the browser;</li><li>• Select the MORE TOOLS option and select the CLEAR BROWSING DATA option – the system will then display the CLEAR BROWSING DATA screen;</li><li>• Select LAST HOUR in the time range field, tick all three options displayed, and click on the CLEAR DATA button – the</li></ul>
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	<p>browser will then clear the browser data.</p>
<p>Logo displayed on the sign in page</p>	<p>This field enables you to change the logo that is displayed on the SIGN IN page of the system.</p> <p>The current logo is displayed if one has already been selected.</p> <p>Click on the logo to upload a new logo – the system will then display the UPLOAD SIGN IN PAGE LOGO screen.</p> <p>Click on the CLICK HERE TO SELECT THE IMAGE TO BE USED link – the system will then prompt you to select the image you want to use for your logo.</p> <p>Select the required image – the system will then display the logo on the page.</p> <p>Click on the SAVE CHANGES button to save the details of the new logo.</p> <p><b>PLEASE NOTE</b></p> <p><b>Uploaded file must be in PNG format and we recommend that the image has a transparent background.</b></p> <p><b>You may need to refresh/clear browsing data and/or sign out/sign in once you have changed the logo for any changes to take effect.</b></p> <p><b>CLEARING BROWSER DATA IN CHROME</b></p> <p>To clear browsing data in Chrome:</p> <ul style="list-style-type: none"> <li>• Click on the menu option in the top right hand corner of the browser;</li> <li>• Select the MORE TOOLS option and select the CLEAR</li> </ul>

	<p>BROWSING DATA option – the system will then display the CLEAR BROWSING DATA screen;</p> <p>Select LAST HOUR in the time range field, tick all three options displayed, and click on the CLEAR DATA button – the browser will then clear the browser data.</p>
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## API SETTINGS PAGE

This page is used to set API (Application Programming Interface) settings for third party applications that interface with ClubServe such as:

- MailChimp
- TextLocal

### DISPLAYING THE PAGE

To display the page:

- Click on the SYSTEM SETTINGS option in the main menu and select the API SETTINGS option – the system will then display the API SETTINGS page.

### PAGE OVERVIEW

The page is split into a number of sections, each represented by a coloured bar. Each third party application is represented by a section.

Click on a section title to expand/collapse that section.

### MAILCHIMP

MailChimp is a third-party application aimed at making it easy to send professional email newsletters and marketing.

You can add one or more MailChimp accounts to ClubServe.

Click on the ADD MAILCHIMP ACCOUNT button to display the ADD NEW MAILCHIMP ACCOUNT screen. Enter the ACCOUNT NAME, API KEY and SORT ORDER details and click on the ADD MAILCHIMP ACCOUNT button – the system will then save the details and display them on the API SETTINGS page.

### TEXTLOCAL

TextLocal is a third-party application that enables you to send text messages from ClubServe to contacts on your system.

### TEXTLOCAL FIELDS

Username	Enter the email address you have registered with your Textlocal account
Password	Enter the password you have registered with your Textlocal account
Sender Name	Enter the SENDER NAME you have registered with your Textlocal account
Chars per Text	Enter the number of characters you want to limit each text to
Set test mode on as default	<p>Tick this field if you want the SEND TEXT page to be in TEST mode by default.</p> <p>Test mode means that no texts are actually sent by the system.</p>



## GOCARDLESS SETTINGS PAGE

This page is used to enter your GoCardless settings to allow direct debit payments (recurring and one-off) to be made on the system.

### DISPLAYING THE PAGE

To display the GOCARDLESS settings page:

- Click on the SYSTEM SETTINGS menu option in the main menu – the system will then display the SETTINGS menu options;
- Click on the SETTINGS option on the right side below CUSTOMER PORTAL – the system will then display the CUSTOMER PORTAL SETTINGS page;
- Click the FINANCIAL option and then GOCARDLESS SETTINGS – the system will display the GoCardless settings page.

### PAGE OVERVIEW

Enter the details of your GoCardless account in the fields on the left side and your settings in the fields on the right side of the page. Once you have completed the details, click SAVE CHANGES at the bottom of the page to return to the CUSTOMER PORTAL SETTINGS page.

### PAGE CONTENTS

Use Test Site	Tick this if you are testing the system and using the GoCardless Sandbox account
Test Access Token	<p>If you are using a test account then enter the access token from your Sandbox account.</p> <p>Click here for more information on setting up an access token:  <a href="https://support.gocardless.com/hc/en-gb/articles/360014231120-Creating-a-sandbox-API-access-token-API-users-only-">https://support.gocardless.com/hc/en-gb/articles/360014231120-Creating-a-sandbox-API-access-token-API-users-only-</a></p>

Live Access Token	If you are not using the test system then enter the access token from your live account (the access token will be different)
Webhook Secret	This is required to enable GoCardless to send notifications to the system about payments etc. further details on setting up your Webhook Secret can be found below in the WEBHOOK SECRET section
Webhook URL	This is the URL where GoCardless will send notifications to the system – you will need to copy and paste this URL when setting up your Webhook Secret
Payment Date	Enter the date of the month you want to collect recurring payments (e.g., for a monthly membership payment)
Mark as Overdue Days	Enter the number of days after the payment date a payment should be marked as overdue if not received. You can setup your dashboard to show the number of overdue payments so you can track these.
Email Failed to Send Payment Notifications	Enter the email address where notifications of failed payments should be sent
Payment Failed Email	Select a document which contains the email text you want to send to a customer when their payment fails. The reason for the failure will be included in the email.

Allow Recurring Payments	Tick this if you want to allow recurring payments to be made via GoCardless, for example monthly membership payments
Allow One-Off Payments	Tick this if you want to allow one-off payments to be made via GoCardless, for example a payment for an event booking

**WEBHOOK SECRET**

Login to your GoCardless account to setup your Webhook. You will be asked for the following:

Name	Enter a unique name to identify your Webhook (e.g., ClubServe)
URL	Copy and paste the WEBHOOK URL field from the system.
Secret	Leave this field blank

Click CREATE WEBHOOK ENDPOINT to create the webhook. A list of your webhooks will be displayed – click on the newly created webhook and copy the SECRET. You will then need to paste into the WEBHOOK SECRET field on the system.

## SYSTEM USERS PAGE

This page is used to add, edit and delete system user details on the system.

SYSTEM USER is the term we use to describe someone who can access the ClubServe system.

### DISPLAYING THE PAGE

To display this page:

- Click on the SYSTEM SETTINGS option in the main menu - the system will then display the SYSTEM SETTINGS menu;
- Click on the SYSTEM USERS option – the system will then display the SYSTEM USERS page.

### PAGE OVERVIEW

The page displays a list of the current system users that have been set up on the system.

### PAGE CONTENTS

System User list	<p>The system displays a list of the current system users that have been set up on the system.</p> <p>Click on the name of a system user to edit/delete that user's details – the system will then display the EDIT USER DETAILS page.</p> <p>Click on the PLUS icon in the page header to add a new system user – the system will then display the ADD NEW USER page.</p>
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## ADD NEW SYSTEM USER PAGE

This page is used to add a new system user.

### DISPLAYING THE PAGE

To display this page:

- Click on the SYSTEM SETTINGS option in the main menu - the system will then display the SYSTEM SETTINGS menu;
- Click on the SYSTEM USERS option – the system will then display the SYSTEM USERS page;
- Click on the PLUS icon in the page header – the system will then display the ADD NEW USER page.

### PAGE OVERVIEW

The page consists of a set of fields to enable you to set up the new user and a list of departments to assign the new user to.

Complete the details as required and then click on the ADD NEW USER button. The system will then create the new system user, who will then be able to access the system using the credentials you have set up for them.

### PAGE CONTENTS

User ID	This is the user ID the person will use to sign in to the system.
Active	Tick this field to mark the person as an active system user.
First Name	Enter the first name of the user.

Surname	Enter the surname of the user.
Linked to Contact	Click on the magnifying glass to link the system user to an existing contact on the system.
Mobile Phone	Enter the mobile phone number of the user.
Password / Confirm Password	Enter the password you are assigning to the user.  The user will use the assigned USER ID and PASSWORD to gain access to the system.
User Type	There are two user types to choose from: <ul style="list-style-type: none"> <li>• BACK OFFICE – someone who will be using the system as an administrator;</li> <li>• COACH – someone who will be using the system as a coach/instructor.</li> </ul> <p>COACH access displays a very limited number of pages to the user which primarily enable them to take event registers.</p>
User Role	USER ROLES are used to control the access rights and levels of system users.  If you do not use user roles, all users on the system will be able to access all pages and functionality.

	<p>If you have set up some user roles, select the one you want to assign to the user. They will then have the access rights that have been assigned to the user role.</p> <p><b>PLEASE NOTE</b></p> <p>User role settings will have no effect unless the ENABLE ROLE SECURITY checkbox has been ticked on the SYSTEM SETTINGS / SYSTEM SETUP / SECURITY SETTINGS page.</p> <p>You should ensure that at least one user has been set up with full rights to all parts of the system BEFORE this checkbox is enabled.</p>
<p>Email Settings</p>	<p>You can set up personal email settings for a system user by completing the details in the mini section as prompted.</p>
<p>DEPARTMENTS list</p>	<p>The system displays a list of departments that your organisation has set up on the system.</p> <p>Tick the departments that you want to link the user to.</p>
<p>Email daily list of outstanding to do items</p>	<p>Tick this field if you want the system to email the user with a daily list of their personal to do items that are not completed.</p>

## USER ROLES PAGE

This page displays the user roles that have been set up on the system by your organisation.

User roles are used to control what pages/functionality a system user has access to on the system. You can create an unlimited number of user roles on the system.

### PLEASE NOTE

User role settings will have no effect unless the ENABLE ROLE SECURITY checkbox has been ticked on the SYSTEM SETTINGS / SYSTEM SETUP / SECURITY SETTINGS page.

You should ensure that at least one user has been set up with full rights to all parts of the system BEFORE this checkbox is enabled.

## DISPLAYING THE PAGE

To display this page:

- Click on the SYSTEM SETTINGS option in the main menu - the system will then display the SYSTEM SETTINGS menu;
- Click on the USER ROLES option - the system will then display the USER ROLES page.

## PAGE OVERVIEW

The page lists the current user roles that have been set up on the system.

Click on a role to view/edit/delete the role details.

Click on the PLUS icon to the right of the page header to add a new role to the system.



## ADD NEW USER ROLE PAGE

This page is used to add a new user role to the system.

### PLEASE NOTE

User role settings will have no effect unless the ENABLE ROLE SECURITY checkbox has been ticked on the SYSTEM SETTINGS / SYSTEM SETUP / SECURITY SETTINGS page.

You should ensure that at least one user has been set up with full rights to all parts of the system BEFORE this checkbox is enabled.

## DISPLAYING THE PAGE

To display this page:

- Click on the SYSTEM SETTINGS option in the main menu - the system will then display the SYSTEM SETTINGS menu;
- Click on the USER ROLES option - the system will then display the USER ROLES page;
- Click on the PLUS icon in the page header – the system will then display the ADD NEW USER ROLE page.

## PAGE OVERVIEW

The page is split into a number of sections. Each of the settings in each section enables you to set the required access for the current role.

Complete the sections as required and click on the ADD NEW ROLE button to save the role details on the system. Any user you subsequently assign to the new role will have the assigned access privileges you have set up for the role.

## PAGE CONTENTS

### PAGE FIELDS

Title	Enter the title for your new role, e.g., Administrator.
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Description	You can optionally provide a short description for the role.
ACCESS TO SETTINGS section	Use the fields to set the required privileges to the SYSTEM SETTINGS section of the system.
ACCESS TO CONTACTS section	Use the fields to set the required privileges to the CONTACTS section of the system.
ACCESS TO EVENTS section	Use the fields to set the required privileges to the EVENTS section of the system.
ACCESS TO MEMBERSHIP section	Use the fields to set the required privileges to the MEMBERSHIP section of the system.
ACCESS TO RESOURCES section	Use the fields to set the required privileges to the RESOURCES section of the system.
ACCESS TO BOOKKEEPING section	Use the fields to set the required privileges to the BOOKKEEPING section of the system.
ADD NEW ROLE button	Click to save the new role details on the system. You can then link one or more system users to the new role.

**PAGE MENU**

Set all to FULL access	Select this option if you want to quickly set all fields to full access.
Set all to NO access	Select this option if you want to quickly set all fields to no access.
Copy to New Role	Select this option to create a new role from an existing role.  This option is only available when viewing an existing role.
Delete Role	Select this option to delete an existing role.  This option is only available when viewing an existing role.

# TEAMS

## INTRODUCTION

The TEAMS module enables your organisation to:

- Set up an unlimited number of teams on the system for any type of sport/activity and for any type of league;
- Provide members and non-members with the ability to express their interest in participating in matches via the customer portal;
- Assign players to teams as team members or reserves, and assign captains;
- Create team fixtures as events on the system and record results;
- Set up and collect match fees via the customer portal;
- Enable team members to track results via the customer portal.

## TERMINOLOGY USED

Season	This is the term we use for a period of time in which matches are played, e.g., Summer Season.
Team Categories	This is a way of grouping teams together, e.g., you may have a team category called LADIES, and the teams within this category could be Ladies 1 <sup>st</sup> , Ladies 2 <sup>nd</sup> etc. Players will express an interest in playing for a team category and you will then assign the players to the teams.

## GETTING STARTED

Before you can start creating teams, you will need to set up the following:

- Activities – you will need to set up your different sport types;

- Event Type – you will need to have an EVENT TYPE on the system that has the TEAM MATCH/FIXTURE EVENT checkbox ticked. This will allow you to setup matches/fixtures for your teams.

## ADD A TEAM LEAGUE PAGE

This page is used to create team leagues on the system. When setting up a team you will then link the team to a league.

### DISPLAYING THE PAGE

To display the ADD NEW TEAM LEAGUE page:

- Click on the COMPETITIONS menu option in the main menu – the system will then display the COMPETITIONS & TEAMS menu options;
- Click on the TEAM SETTINGS – the system will then display the TEAM SETTINGS page;
- Click the LEAGUES option to display the TEAM LEAGUES page. Click the 'plus' icon next to the page header to display the ADD NEW TEAM LEAGUE page.

### PAGE OVERVIEW

Enter the details of your team league and then click SAVE DETAILS to return to the TEAM LEAGUE page.

### PAGE CONTENTS

League Title	Enter the name of the league, e.g., Summer Doubles League
For Activity	Select the activity that the league belongs to
Sort Order	Enter the sort order (a lower sort order will be displayed first in the list of leagues)





## ADD A TEAM SEASON PAGE

This page is used to create team seasons on the system. When setting up a team you will then link the team to a season.

### DISPLAYING THE PAGE

To display the ADD NEW TEAM SEASON page:

- Click on the COMPETITIONS menu option in the main menu – the system will then display the COMPETITIONS & TEAMS menu options;
- Click on the TEAM SETTINGS – the system will then display the TEAM SETTINGS page;
- Click the SEASONS option to display the TEAM SEASON page. Click the 'plus' icon next to the page header to display the ADD NEW TEAM SEASON page.

### PAGE OVERVIEW

Enter the details of your team season and then click SAVE DETAILS to return to the TEAM SEASON page.

### PAGE CONTENTS

Title	Enter the name of the season, e.g., Summer
Description	Enter further text to describe the season (optional)
Sort Order	Enter the sort order (a lower sort order will be displayed first in the list of seasons)



## ADD A TEAM CATEGORY PAGE

This page is used to create team categories on the system. When setting up a team you will then link the team to a league. Team categories are a way of grouping teams together to make the team selection process as easy as possible.

### DISPLAYING THE PAGE

To display the ADD NEW TEAM CATEGORY page:

- Click on the COMPETITIONS menu option in the main menu – the system will then display the COMPETITIONS & TEAMS menu options;
- Click on the TEAM SETTINGS – the system will then display the TEAM SETTINGS page;
- Click the TEAM CATEGORIES option to display the TEAM CATEGORIES page. Click the 'plus' icon next to the page header to display the ADD NEW TEAM CATEGORY page.

### PAGE OVERVIEW

Enter the details of your team category in the fields on the left-hand side and you can add contacts to the team category by clicking the 'plus' icon next to the INTERESTED CONTACTS header on the right-hand side.

### PAGE CONTENTS

Category Title	Enter the name of your team category, e.g., Ladies Tennis
For Activity	Select the activity that the league belongs to
For Gender	Select the gender for the team category

For Age Range	Select the age range for the team category (set the maximum age to 99 if there is no maximum age)
Allow Users to Register Interest on Portal	Tick the checkbox if you want to allow users to register their interest on the portal. People who meet the eligibility criteria (gender/age) will be able to submit their interest. You can then use the Team Selection tool to put those people into the teams that belong to the category. You can untick this checkbox when you no longer want to receive expressions of interest for the team category
Allow Users to Register Interest in Being a Captain	If users are allowed to express an interest via the portal, you can allow them to express an interest in being a team captain
Allow Users to Register Interest in Being a Reserve	If users are allowed to express an interest via the portal, you can allow them to express an interest in being a reserve (so they are happy to play if required but would rather not be part of a specific team)
Sort Order	Enter the sort order (a lower sort order will be displayed first in the list of leagues)

## ADD A TEAM PAGE

This page is used to create teams on the system. You can then assign players and create matches for the team.

### DISPLAYING THE PAGE

To display the ADD A TEAM page:

- Click on the COMPETITIONS menu option in the main menu – the system will then display the COMPETITIONS & TEAMS menu options;
- Click on the TEAM SETTINGS – the system will then display the TEAM SETTINGS page;
- Click the TEAMS option to display the TEAMS SUMMARY page. Click the 'plus' icon next to the page header to display the ADD NEW TEAM page.

### PAGE OVERVIEW

Enter the details of your team in the fields on the left side. On the right-hand side, you can add players to your team in the TEAM SELECTION section and add matches for the team in the FIXTURES section.

### PAGE CONTENTS

Team Title	Enter the name of your team, e.g., Ladies First Team
For Season	Select the season this team will be competing in
For Activity	Select the activity for this team

For Team Category	Select the team category for this team, e.g., Ladies
For League	Select the league this team will be competing in
Sort Order	Enter the sort order (a lower sort order will be displayed first in the list of teams)

### ADD A PLAYER TO A TEAM

To add a player to a team:

- Click the 'plus' icon next to the TEAM SELECTION header on the right-hand side. This will display the SELECT CONTACT screen;
- Enter your search criteria for the name of the person you want to add to the team and click FIND CONTACTS;
- Click on the name of a person to add them to the team. They will be displayed in the TEAM SELECTION section with the default status of SELECTED. Click on the name of the person to update the status (options are CAPTAIN/SELECTED/RESERVE). Click REMOVE FROM TEAM to remove the person from the team if required.

### ADD A FIXTURE TO A TEAM

To add fixtures for a team;

- Firstly, ensure that you have an EVENT TYPE on the system that has the TEAM MATCH/FIXTURE EVENT checkbox ticked;
- Click the 'plus' icon next to the FIXTURE header on the right-hand side. This will display the ADD NEW EVENT screen;
- You will want to add one event per team per season. Select the activity and event type required. If you have selected an event type with the TEAM MATCH/FIXTURE checkbox ticked then you will be able to select the team the fixtures are for in the CATEGORY field. Complete the rest of the details and click ADD

NEW EVENT to save your event. You can then add the individual matches and setup match fees etc.;

- Once the match has been completed, open the match to add the match result which will be shown on the fixture list for the team.

## MANAGE TEAM SELECTION PAGE

This page is used to create transfer players from the 'interested in playing' list for a team category to the individual teams within the category.

### DISPLAYING THE PAGE

To display the MANAGE TEAM SELECTION page:

- Click on the COMPETITIONS menu option in the main menu – the system will then display the COMPETITIONS & TEAMS menu options;
- Click on the MANAGE TEAM SELECTION option – the system will then display the MANAGE TEAM SELECTION page.

### PAGE OVERVIEW

Select the season, activity, category and league (optional) you want to select teams for. After selecting the category, the players who have expressed an interest via the portal or been added as an interested contact via the back-office will be displayed in the AVAILABLE FOR SELECTION section.

Click on the name of a player to assign them to a team by ticking the required team, untick the INTERESTED LIST option to remove them from the available for selection table. Click SAVE CHANGES to update the selections for the contact.

On the right-hand side is the TEAM SELECTIONS section. Players already assigned to each team will be displayed here along with their status (captain/selected/reserve). Click on a name to remove or change their team using the checkboxes. Click on a status to update the status for the player.