



Softball Australia

mySoftball Community Training

Module 1

D) – The Registrations Menu

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Updated 5 June 2015



The Registrations Menu

The Registrations menu contains the components that need to be configured to allow you to successfully prepare to register members into the database.

There are three main components that need to be setup:

- **Products:** the 'things' you are selling to your members.
- **Registration Forms:** the actual Form that captures the information you require from your members, and
- **Online Payment Configuration and Payment Splits:** if you wish to receive payments online.

State



Association



Club





Products

Products are anything that you wish to sell to your members. The majority of our products will be membership and fees to a competition. However you can also sell physical items like uniforms and merchandise as products as well. Softball Australia will be creating one product for the membership benefits pack, which is available to all Softball Australia members.

Products can be created at national, state and association levels in the hierarchy.

Currently Softball Australia strongly recommends that the creation of membership products and their pricing is done at State level with the associations and clubs being able to edit the pricing AND being able to create non membership products.

In order to ensure consistency nationwide, when creating your products we ask that you follow some simple rules:

-  Products be put in "Grouping Categories" that reflect the Member Types, ie if there is a member type called 'Senior', then all products for the Senior member type need to be have a Grouping Category of 'Senior'.
-  When changing from season to season, do NOT edit existing products as this will have an impact on transactional reporting. Archive last season's products, and create a NEW set for each new season.
-  Take time to create products for people who may be playing in your competition on-permit from another club/association. These people will have already paid for an annual membership and therefore should have a product with a price that reflects this.
-  As we wish to capture all people who participate in our sport, then we need to create products that cater for off diamond participation, as well as products for people who participate in more than just playing, ie player umpire, player coach, player administrator.



IMPORTANT: Government funding for our sport is based on participation numbers. If all we capture in the database is those people who play the sport, then we are doing ourselves a disservice in not reporting participation correctly. Take the time to create products that allow us to capture an accurate record of those who participation in our sport.



1 Example of how we would report multiple participation.

First Name	Family Name	Date of Birth	Club Name	Member Record Type	Product	Line Item Total
Thomas	Matthews	22/09/1970	Club 7	Fastpitch	Off-Diamond-Administrator - PLAYER	0.00
Thomas	Matthews	22/09/1970	Club 7	Fastpitch	Official-Player - COACH	0.00
Thomas	Matthews	22/09/1970	Club 7	Fastpitch	Fastpitch-Senior	100.00
Elise	Matthews	21/11/1972	Club 7	Fastpitch	Official-Player - UMPIRE	0.00
Elise	Matthews	21/11/1972	Club 7	Fastpitch	Fastpitch-Senior	100.00
Elise	Matthews	21/11/1972	Club 7	Fastpitch	Off-Diamond-Administrator - PLAYER	0.00
Elise	Matthews	21/11/1972	Club 7	Fastpitch	OTHER-Members-BENEFIT-PACKAGE	5.00

7 rows

Report Run Mon Jun 1 10:59:52 2015

2 We have two members who have multiple participation in our sport. Both play fastpitch, both are administrators in the game and both are officials.

3 We do not count Elise's Benefit package as this is not a participation product.

4 By doing this as well, we can get a true number of how many people we have involved in technical aspects of the game like umpiring, scoring and coaching.

Creating a new product

5 Click **Products** under **Registrations**.

Softball Australia Manager

LEVEL SELECTION DEMO STATE

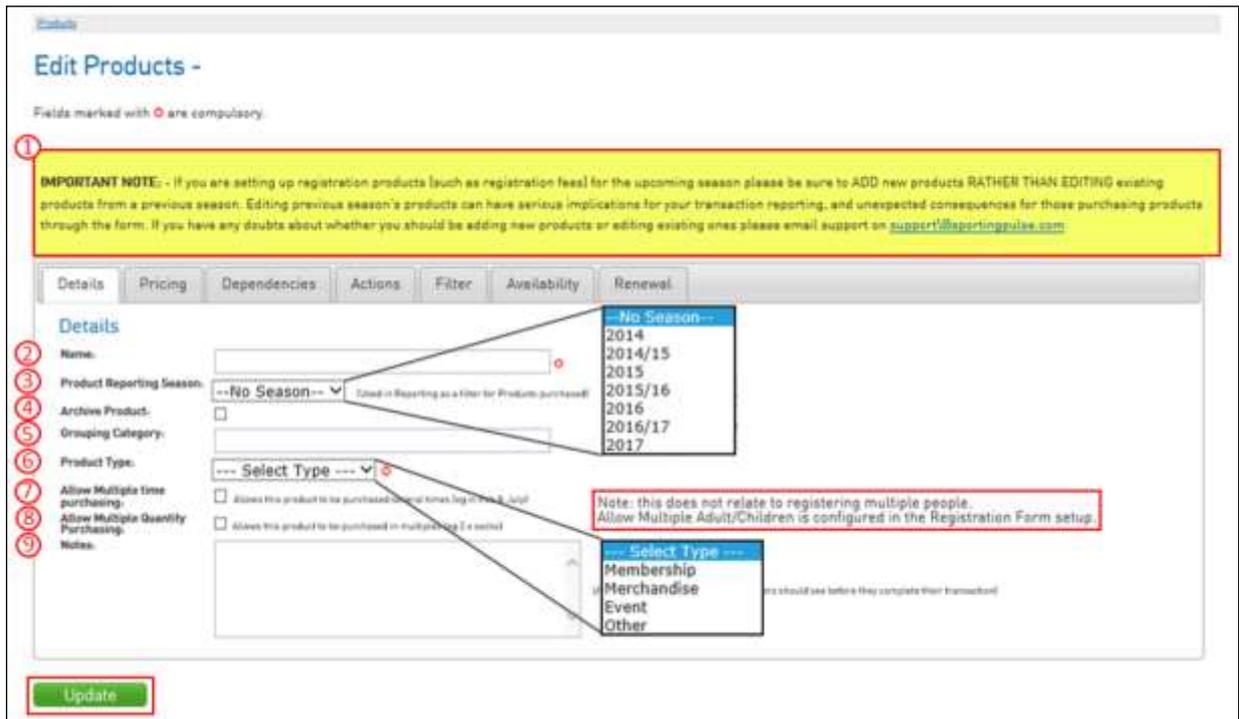
Dashboard Associations Clearances Registrations Reports

Products

Choose a value from the list below to edit. Some options may be locked by your national/international body and cannot be edited. If you wish to add a new product click the **ADD A NEW PRODUCT** link.

Name	Price	Active ?	Created By	Copy Product
Group: Off-Diamond (8 products)				
Administrator - non-player	50.00			Copy
Administrator - PLAYER	0.00			Copy
Board Member - non-player	50.00	<input checked="" type="checkbox"/>	State	Copy
Board Member - PLAYER	0.00	<input checked="" type="checkbox"/>	State	Copy
Committee Member - Non-Player	50.00	<input checked="" type="checkbox"/>	State	Copy
Committee Member - PLAYER	0.00			Copy
Fan - non-player	5.00			Copy
Volunteer - non-player	5.00	<input checked="" type="checkbox"/>	State	Copy
Group: Casual (2 products)				
Better Up (SBU)	10.00	<input checked="" type="checkbox"/>	State	Copy
Masters Event	75.00	<input checked="" type="checkbox"/>	State	Copy
Group: Fastpitch (4 products)				
Junior	75.00	<input checked="" type="checkbox"/>	State	Copy
Junior - On Permit	55.00	<input checked="" type="checkbox"/>	State	Copy
Senior	100.00	<input checked="" type="checkbox"/>	State	Copy
Senior - On Permit	80.00	<input checked="" type="checkbox"/>	State	Copy
Group: Stowpitch (4 products)				
Junior	75.00	<input checked="" type="checkbox"/>	State	Copy
Junior - On Permit	55.00	<input checked="" type="checkbox"/>	State	Copy

6 Click [Add a New Product](#), which will take you to [Details](#).



- 1 A reminder warning that at the start of the season you should add new products rather than edit existing ones. Suggestion is to Archive old products once the new ones are in place.
- 2 The name of the product you are creating (set a standard structure and be consistent) – MANDATORY.
- 3 Choose the season that the product is for using the drop down box.
- 4 Archive the product by selecting this tick box. Product will be set as inactive. Note it is not deleted and remains in the database.
- 5 This groups your products together. Use the Member Type as the grouping name, ie Under the member type of Senior you may have a product called Fastpitch and Slowpitch.
- 6 Select the product type from the pull down box – MANDATORY.
- 7 & 8 Allows the product to be purchased on more than one occasion. Please note the message to the right of both of these selections.
- 9 Add in any information that purchasers should see before they complete their transaction.

7 Click [Update](#).



8 Click **Pricing**.

- 1 Tax Description, ie GST excluded or GST included – MANDATORY.
- 2 The minimum hierarchy level who is able to change the price of the product (ie State, Association or Club).
- 3 The minimum hierarchy level who is able to sell the product (ie Association or Club).
- 4
 - A. Price –Single Price – (which if you do you see the above). Price is the same across all registrations, including family registrations. Enter the single price and then click **Update**or....
 - B. Price –Multiple prices...where the form changes to the below. Price changes in the case of multiple or family registrations.



9 Enter the prices for multiple registrations then click **Update**....or....

C. Price – Ranged Price (STATE ONLY OPTION) ...where the form changes to the below. Price is the same across all registrations, but if a lower hierarchy level sets their own price, it must be within the defined range.

Price: Single price (price is the same across all registrations, including family registrations).
 Multiple prices (changes in the case of multiple, family, registrations.)
 Ranged prices (Price is the same across all registrations, but if lower levels set their own price, it must be within a range)

Ranged Pricing: Default Price \$ 0.00
 Minimum Price \$ 0.00 Maximum Price \$ 0.00

Payment Split: (Where the money is sent to upon successful online transaction)

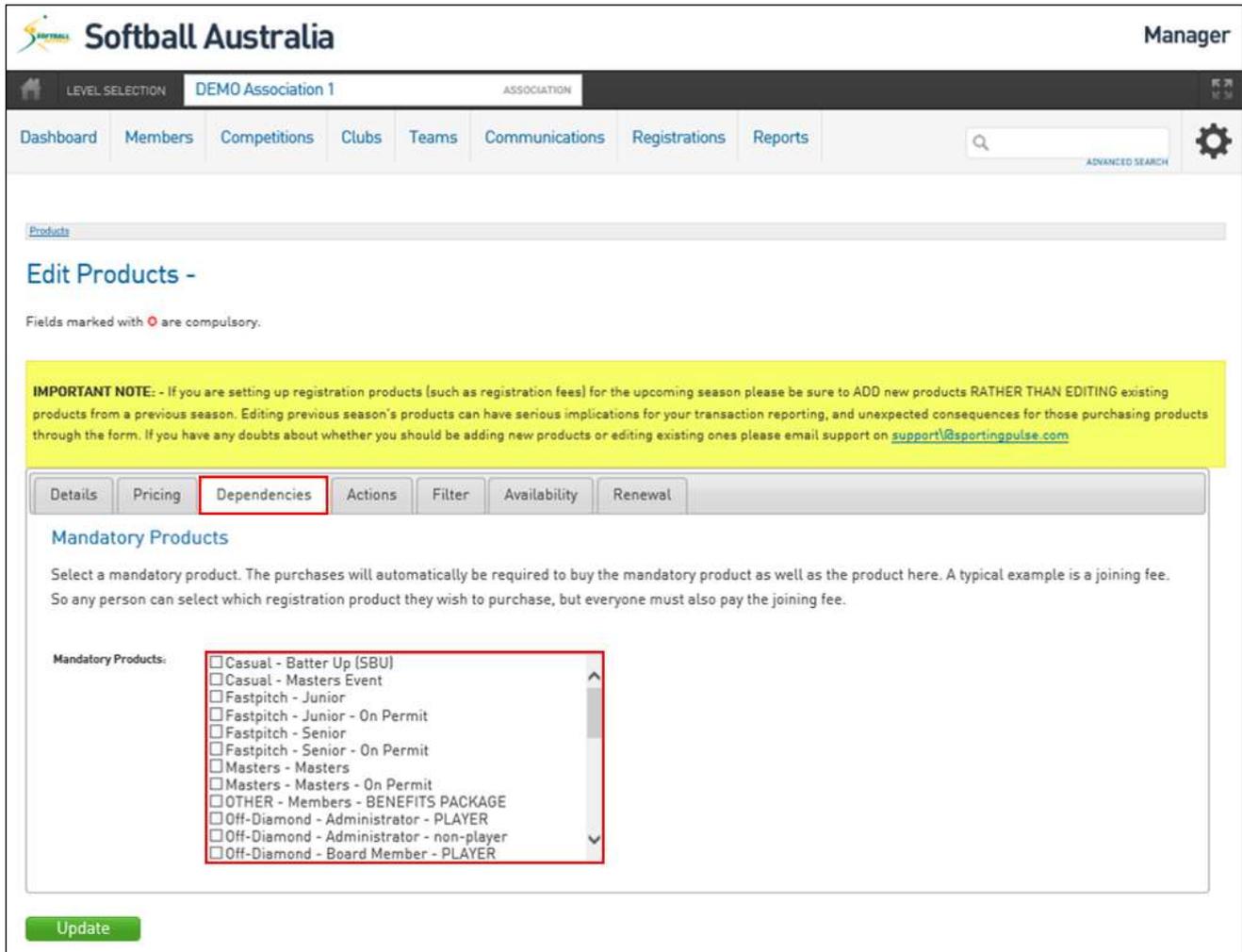
Update

10 Enter the prices for multiple registrations and click **Update**.

5 Payment Split. When you are going to allow people to pay online for the products, Payment Split determines where money is sent to upon a successful online transaction. It is a requirement that you select for each product the **Payment Split** method you will follow for that particular product. If you don't do this, then the product cannot be purchased online.



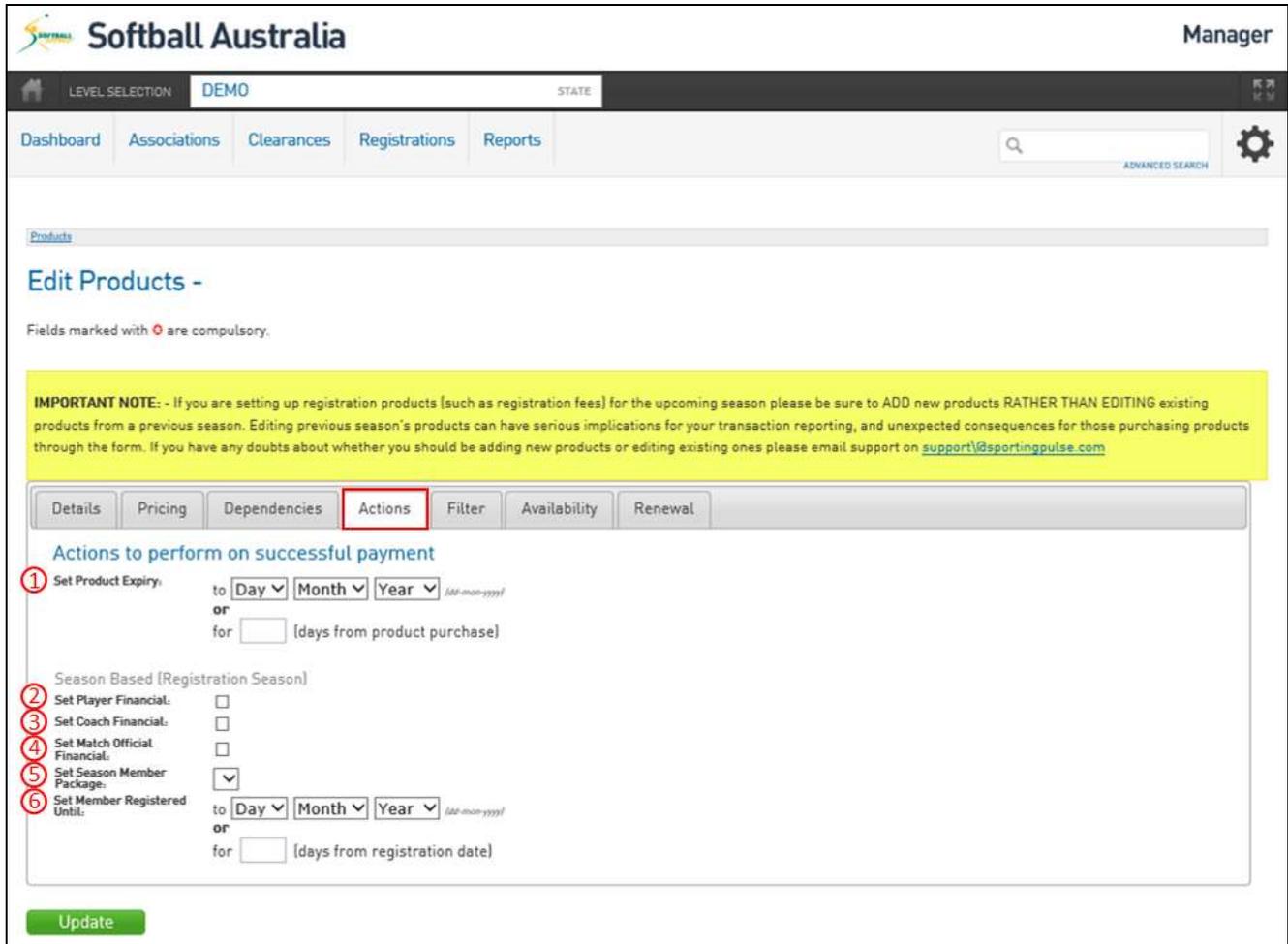
11 Click on **Dependencies**.



12 This will allow you to set another product you have set up as mandatory when this product is purchased. So for your Registration Fee for example, if you charge a Membership fee as well (and its set to mandatory), when the Registration Fee is purchased the Membership fee will be mandatorily purchased. To make a product mandatory simply tick the appropriate product in the box.

13 Click **Update**.

14 Click **Actions**.



Softball Australia Manager

LEVEL SELECTION: DEMO STATE

Dashboard Associations Clearances Registrations Reports

Products

Edit Products -

Fields marked with * are compulsory.

IMPORTANT NOTE: - If you are setting up registration products (such as registration fees) for the upcoming season please be sure to ADD new products RATHER THAN EDITING existing products from a previous season. Editing previous season's products can have serious implications for your transaction reporting, and unexpected consequences for those purchasing products through the form. If you have any doubts about whether you should be adding new products or editing existing ones please email support on support@sportingpulse.com

Details Pricing Dependencies **Actions** Filter Availability Renewal

Actions to perform on successful payment

1 Set Product Expiry: to Day Month Year Add: mm-dd-yyyy
or for [] (days from product purchase)

Season Based (Registration Season)

2 Set Player Financial:

3 Set Coach Financial:

4 Set Match Official Financial:

5 Set Season Member Package:

6 Set Member Registered Until: to Day Month Year Add: mm-dd-yyyy
or for [] (days from registration date)

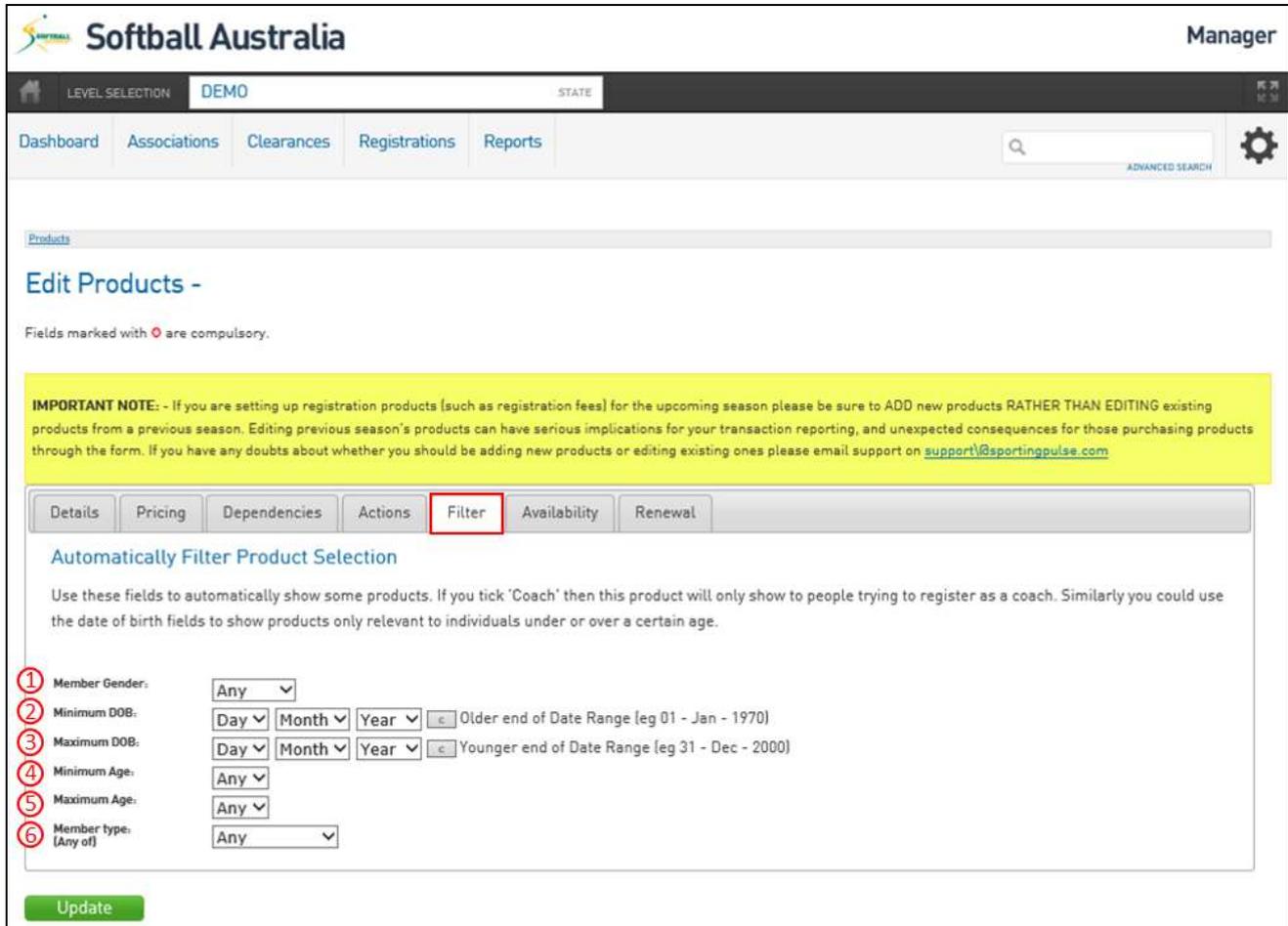
Update

15 This menu allows you to set what actions take place once a member purchases the product:

- 1 **Set Player Financial:** Tick this box if you'd like the member's status to be marked as 'Financial' for the season after purchasing this product.
- 2 **Set Coach Financial:** Tick this box if you'd like the coach's status to be marked as 'Financial' for the season after purchasing this product.
- 3 **Set Match Financial:** Tick this box if you'd like the match's status to be marked as 'Financial' for the season after purchasing this product.
- 4 **Set Season Member Package:** Choose the season that the members will be in.
- 5 **Set Member Registered Until:** Set a date, or number of days from registration, that the member will be registered for.

16 Click **Update**.

17 Click on **Filter**.



The screenshot shows the 'Softball Australia Manager' interface. At the top, there's a navigation bar with 'Dashboard', 'Associations', 'Clearances', 'Registrations', and 'Reports'. Below this is a search bar and a gear icon. The main content area is titled 'Edit Products -' and includes a note about compulsory fields. A yellow banner contains an 'IMPORTANT NOTE' regarding adding new products. Below the banner are tabs for 'Details', 'Pricing', 'Dependencies', 'Actions', 'Filter', 'Availability', and 'Renewal'. The 'Filter' tab is active and shows a section titled 'Automatically Filter Product Selection' with instructions and six numbered filter options: 1. Member Gender (Any), 2. Minimum DOB (Day, Month, Year, Older end of Date Range), 3. Maximum DOB (Day, Month, Year, Younger end of Date Range), 4. Minimum Age (Any), 5. Maximum Age (Any), and 6. Member type (Any of). An 'Update' button is at the bottom left.

18 This menu allows you to filter which members the product will appear to:

- 1 Gender specific products
- 2 Products defined by minimum DOB
- 3 Products defined by maximum DOB
- 4 Products defined by Minimum Age
- 5 Products defined by Maximum Age
- 6 Products defined by the Member Type



19 Remember: if you do decide to filter the product so that it only goes to specific members, then make sure that a similar product is available for those areas like coaches, umpires, scorers, and administrators etc who could be players as well. If you filter these products out then we may NOT get a correct participation count for those members who participate in more than one area.

Click **Update**.



20 Click on **Availability**.



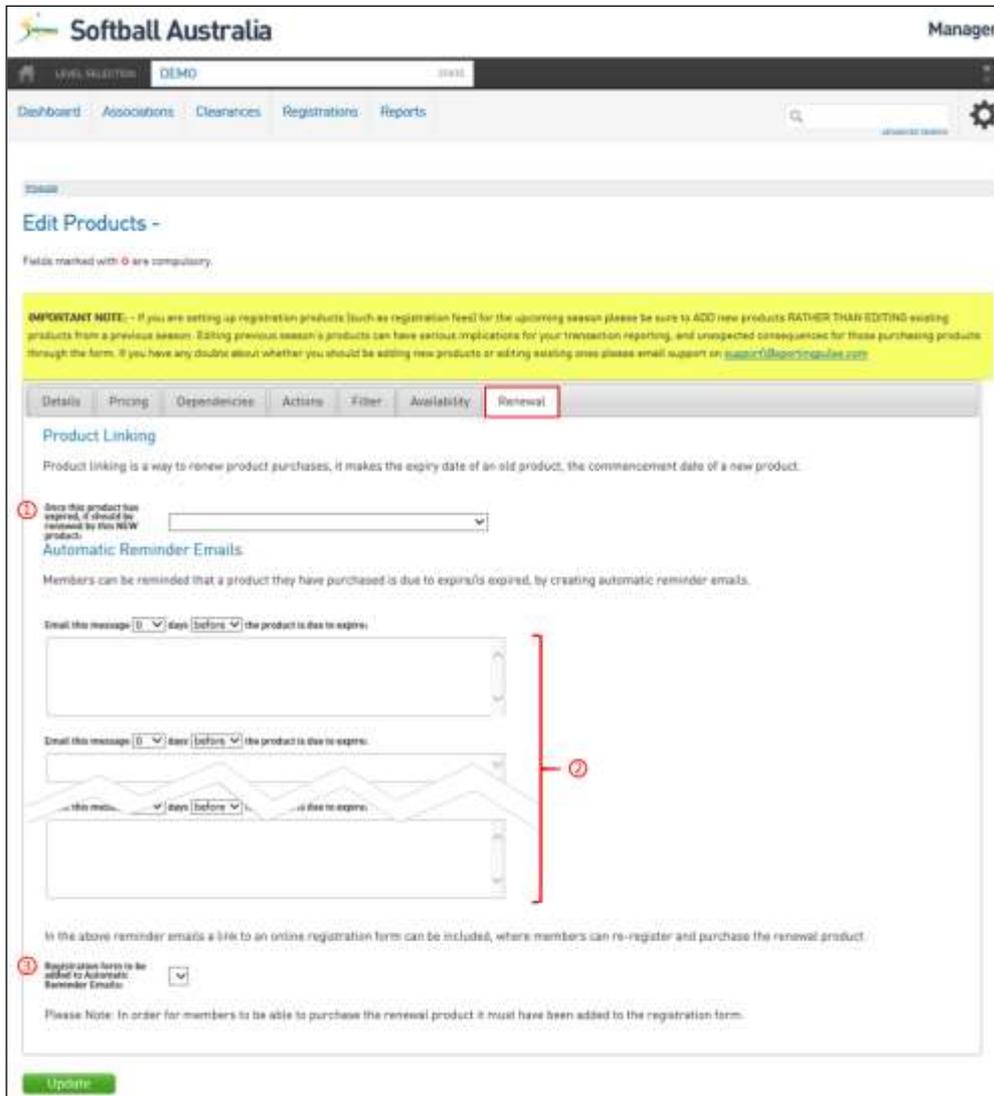
The screenshot shows the 'Softball Australia Manager' interface. At the top, there is a navigation bar with 'LEVEL SELECTION' set to 'DEMO' and 'STATE' set to 'STATE'. Below this is a menu with 'Dashboard', 'Associations', 'Clearances', 'Registrations', and 'Reports'. A search bar and a gear icon are also present. The main content area is titled 'Edit Products -' and includes a note: 'Fields marked with * are compulsory.' A yellow warning box states: 'IMPORTANT NOTE: - If you are setting up registration products (such as registration fees) for the upcoming season please be sure to ADD new products RATHER THAN EDITING existing products from a previous season. Editing previous season's products can have serious implications for your transaction reporting, and unexpected consequences for those purchasing products through the form. If you have any doubts about whether you should be adding new products or editing existing ones please email support on support@sportingpulse.com'. Below the warning is a tabbed interface with 'Availability' selected. The 'Product Availability' section contains the instruction: 'If left blank the product will be available all the time.' It features two rows of date and time pickers: 'Product available from:' and 'Product available to:'. Each row has dropdowns for Day, Month, and Year, followed by two numeric input fields for hours and minutes, and a '24 hour time' label. A green 'Update' button is located at the bottom left of the form.

21 This menu item allows you to setup products before registration opens and define the date and time that they become available AND when they cease to be available.

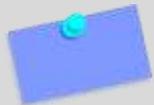
22 When you have finished, click **Update**.



23 Click **Renewal**.



- 1 From the pulldown list select which product will be used to renew once this product has expired.
- 2 You can set up to five reminder messages for those people who have this product letting them know their product is about to expire.
- 3 You can attach a registration form to the automatic emails.

 **NOTE:** This can only be done if the registration form and the renewal product is available.

24 When you have finished, click **Update**.

25 When finished creating the product click on **Click here to return to product list**.

26 You will find yourself back on the main **Product** screen.



27 To create another Product you can copy the one you have just created by clicking **Copy**.

Name	Price	Active ?	Created By	Copy Product
Committee Member - Non-Player	50.00	<input checked="" type="checkbox"/>	State	Copy
Committee Member - PLAYER	0.00	<input checked="" type="checkbox"/>	State	Copy
Fan - non-player	5.00	<input checked="" type="checkbox"/>	State	Copy
Volunteer - non-player	5.00	<input checked="" type="checkbox"/>	State	Copy
Group: Casual (2 products)				
Better Up (SBU)	10.00	<input checked="" type="checkbox"/>	State	Copy
Masters Event	75.00	<input checked="" type="checkbox"/>	State	Copy
Group: Fastpitch (4 products)				

28 You will be asked whether you wish to create a copy. Click **OK**.

29 Edit the new copy by clicking on the magnifying glass icon to the left of the named copy.

Name	Price	Active ?	Created By	Copy Product
Committee Member - Non-Player	50.00	<input checked="" type="checkbox"/>	State	Copy
Committee Member - PLAYER	0.00	<input checked="" type="checkbox"/>	State	Copy
Fan - non-player	5.00	<input checked="" type="checkbox"/>	State	Copy
Volunteer - non-player	5.00	<input checked="" type="checkbox"/>	State	Copy
Group: Casual (3 products)				
Better Up (SBU)	10.00	<input checked="" type="checkbox"/>	State	Copy
Masters Event	75.00	<input checked="" type="checkbox"/>	State	Copy
Masters Event (Copy)	75.00	<input checked="" type="checkbox"/>	State	Copy
Fastpitch (4 products)				

30 You will open up the copy of the product you created, and now all you have to do is change the name, and then go through each tab to ensure that the details are appropriate for the new product.

Softball Australia Manager

LEVEL SELECTION: DEMO STATE

Dashboard Associations Clearances Registrations Reports

Group: Masters Event (Copy)

Edit Products - Masters Event (Copy)

Fields marked with * are compulsory.

IMPORTANT NOTE: - If you are setting up registration products (such as registration fees) for the upcoming season please be sure to ADD new products RATHER THAN EDITING existing products from a previous season. Editing previous season's products can have serious implications for your transaction reporting, and unexpected consequences for those purchasing products through the form. If you have any doubts about whether you should be adding new products or editing existing ones please email support on support@softballpulae.com

Details Pricing Dependencies Actions Filter Availability Renewal

Details

Name:

Product Reporting Season: (Used in Reporting as a filter for Products purchased)

Archive Product:

Grouping Category:

Product Type:



Archiving a Product at the end of the season

- 31 Go to the main [Products](#) screen and select the product you wish to archive, by clicking on the magnifying glass icon to the left of the **Product Name**.



Products

Choose a value from the list below to edit. Some options may be locked by your national/international body and cannot be edited. If you wish to add a new product click the [ADD A NEW PRODUCT](#) link.

Showing **Active** records for Group

Name	Price	Active ?	Created By	Copy Product
Group: Off-Diamond 18 products				
<input type="checkbox"/> Administrator - non-player	50.00	<input checked="" type="checkbox"/>	State	Copy
<input checked="" type="checkbox"/> Administrator - PLAYER	0.00	<input checked="" type="checkbox"/>	State	Copy
<input type="checkbox"/> and Member - non-player	50.00	<input checked="" type="checkbox"/>	State	Copy
<input type="checkbox"/> and Member - PLAYER	0.00	<input checked="" type="checkbox"/>	State	Copy

- 32 Click **Archive Product** tick box then click **Update**.



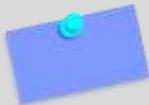


Registration Forms

Registration Forms are the interface between the member and the database, and as such are not something that you create quickly with little thought. You need to consider exactly what it is you are trying to create, not only from an information perspective, but also from a look and feel.

The main 'member to club registration' form has been created at national level, and contains the standard mandatory fields for the national level.

State registrars can pick this up and add fields if required and so can associations and clubs.



NOTE: You cannot change or modify the fields coming to you from the hierarchies above.

33 This one you should use for all member registrations into clubs and associations.

34 That said, if you need additional information at a later stage for players entering representative teams, you can create a new form specific to them to complete. In doing so, you need to make sure that the following four fields are in the form to ensure the information is appended to the member's existing record:

- First Name
- Family Name
- Date of Birth
- Member Type – at least one member type must be selected in the form.



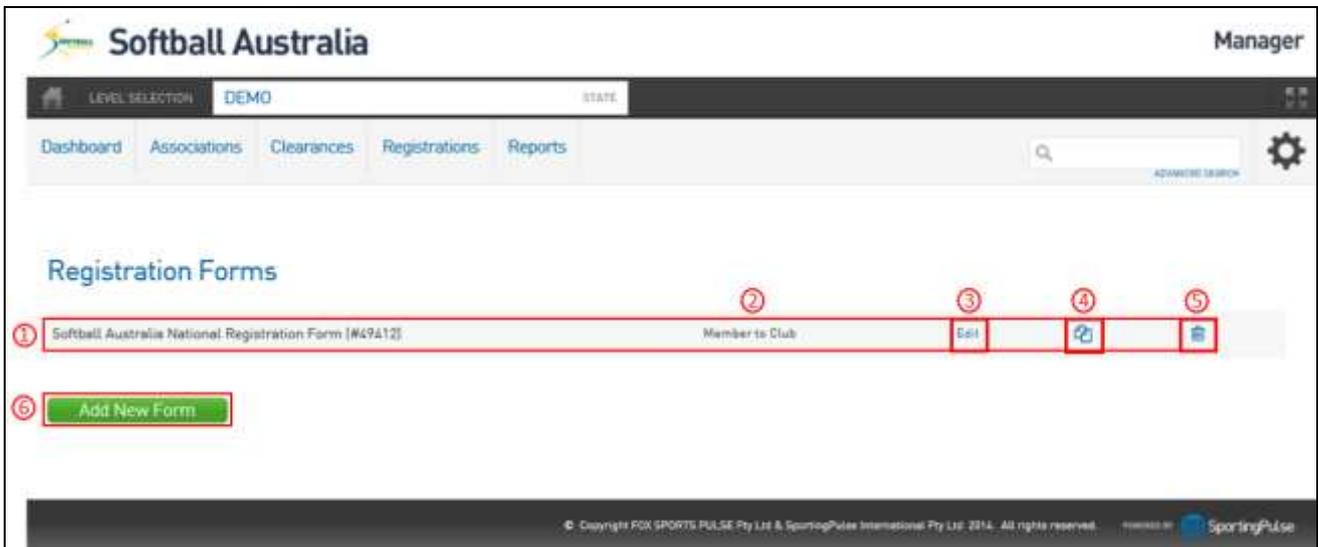
IMPORTANT: Forms are created as frames that hold field IDs in them. So, if you create a form with a custom field, and later on change that custom field, all forms that have that custom field ID in them will show the changed field, not the old one.

This is why it is critical that you plan your registration forms and think about what is necessary.



Creating a new Registration form

35 Click on [Registrations](#), and select [Registration Forms](#).



36 On opening, you will see one existing form, the Softball Australia National Registration Form.

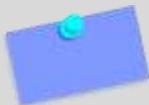
37 You can see the type of form it is. In this case, a Member to Club form.

38 If you have the rights, you can open and edit the existing form.

39 If you wish to use this form to create a similar one, you can copy the form by clicking on the **Copy** icon. This will display a dialog box asking whether you wish to create a copy of the registration form. If you answer yes, a copy will be created with its own unique form number. Click **Edit** and modify the form.

40 You can delete a form.

41 If you wish to create a new form, click **Add New Form**.



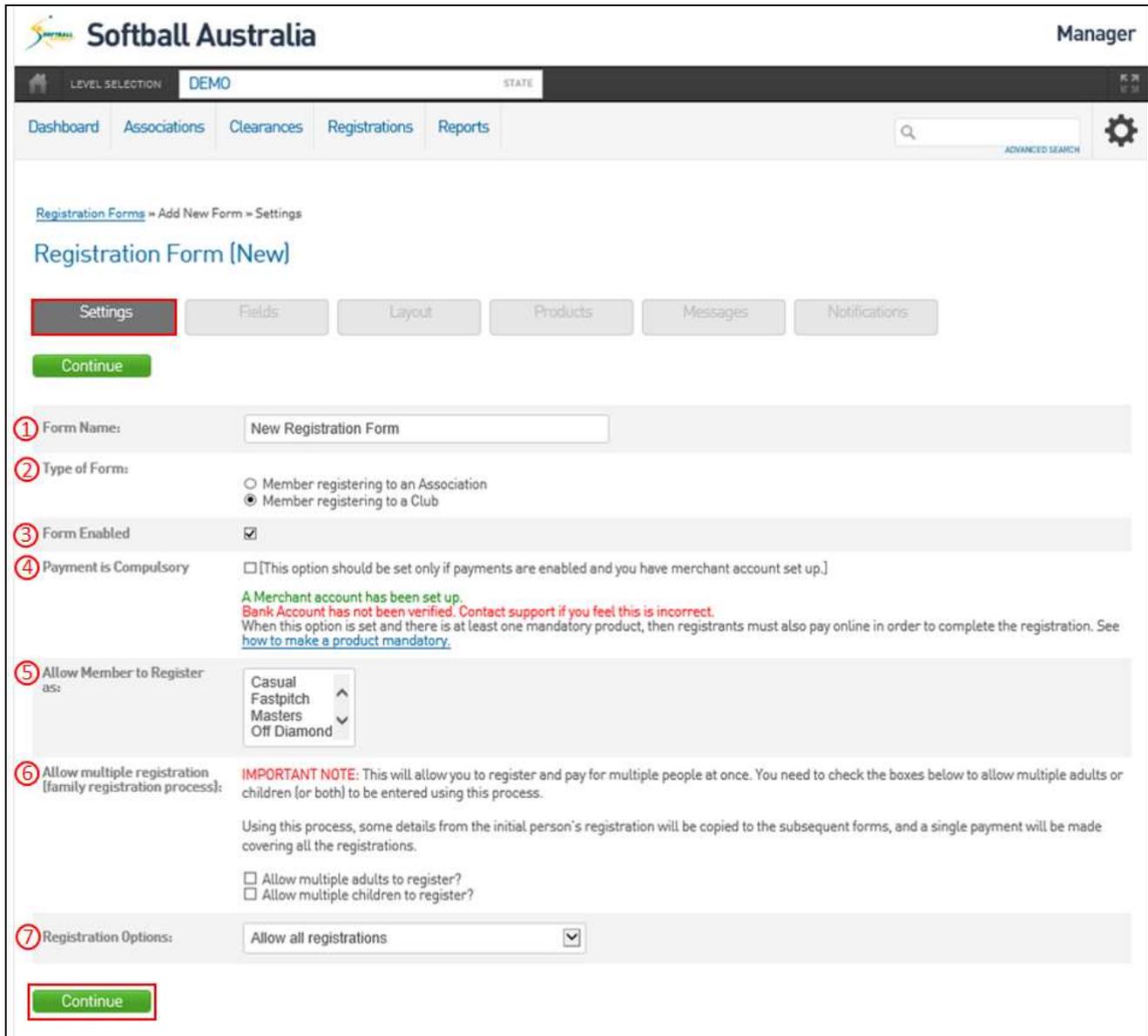
NOTE: The process to create a new form is sequential and you will be stepped through the process as you complete each tab.

Make sure you click **Continue** when you complete EACH tab.

Do **NOT** use your Browser Back button, this will delete any information or work you've done. If you wish to go back to the registration form main screen, then click on the underlined [Registration Forms](#) in the 'bread crumbs' above the Registration Form heading.



42 Click **Add New Form**.

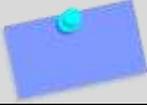


43 You are now in **Settings**.

- 1 Type in the name for the Registration Form. Make sure it is easily understandable
- 2 Select the type of form you are creating. As we are saying that all registrations have to go through the club hierarchy, then select Member registering to a club.
- 3 Click this **Form Enabled** check box when you are ready to have the form active and ready to be used. To make it inactive, untick the box.
- 4 Only tick the box **Payment is Compulsory** if you have yourself setup as a merchant in the online payment section (later on in this module), AND you require everyone to pay online. If you turn this on, then it means that anyone who does not pay online will not get registered.
- 5 This section lists the Member Types which are currently Fastpitch, Slowpitch, Masters, Casual, Officials, Off Diamond and Tee Ball. This will be moving to Senior, Junior, Sub Junior, Casual, Official, and Off Diamond.



In the form, the member selects the Member Type that they fit into. As a minimum you must have one selected...but for registration forms, please select ALL the member types. To do this, click on the member types you want while holding down the Ctrl Key.



NOTE: This is a scroll list, there are more than four member types.

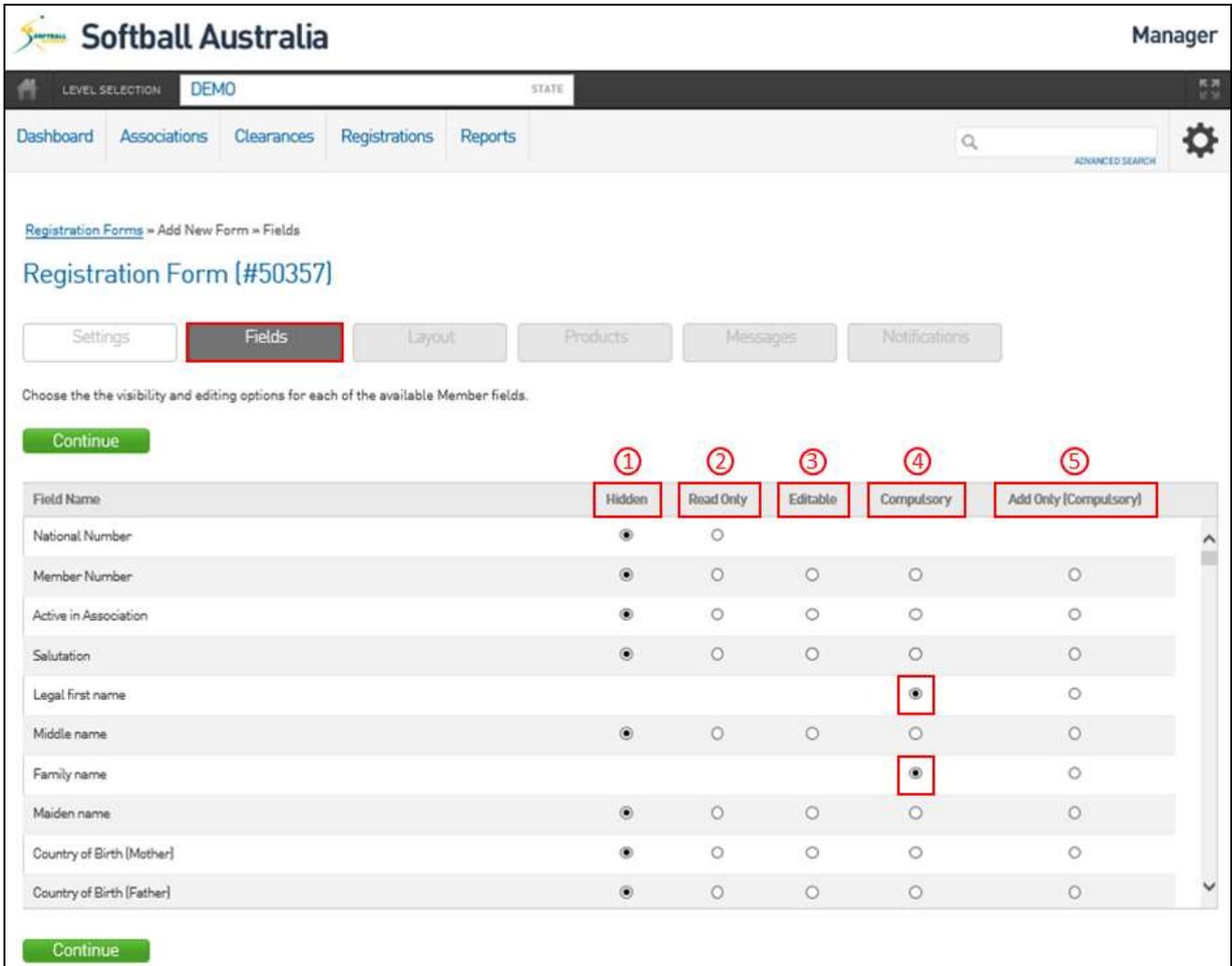
- 6 This allows one person to handle multiple registrations, ie a mother registering herself into a slowpitch competition and her children into Tee Ball.
- Tick on the boxes if you wish a single person to be able to register multiple adults and multiple children.
- 7 Registration options:
- a) **Allow all registrations:** Anyone can register through this registration form.
 - b) **Allow new registrations if not in national system:** Only members who aren't currently in the national database can register.
 - c) **Allow new registrations only if in national system:** Only members who are currently in the national database can register.
 - d) **Allow existing members only:** Only allows members who have their Username and Password to register again.
 - e) **Allow new registrations only:** Doesn't display the Username and Password login and if Duplicates are found with this person then the member won't be allowed to proceed.
 - f) **Allow new only if already in the association:** This will allow new members but only if they are already entered into the association database.

Recommendation is to leave it at the default of **Allow all Registrations**.

- 8 Click **Continue** when you complete this tab.



Fields



Registration Forms » Add New Form » Fields

Registration Form (#50357)

Settings **Fields** Layout Products Messages Notifications

Choose the the visibility and editing options for each of the available Member fields.

Continue

Field Name	① Hidden	② Read Only	③ Editable	④ Compulsory	⑤ Add Only (Compulsory)
National Number	<input checked="" type="radio"/>	<input type="radio"/>			
Member Number	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Active in Association	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Salutation	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Legal first name	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Middle name	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Family name	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Maiden name	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Country of Birth (Mother)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Country of Birth (Father)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Continue

44 This is the tab where you choose the fields that you would like in your form and status of that field.

45 Along the top there are five levels of field status.

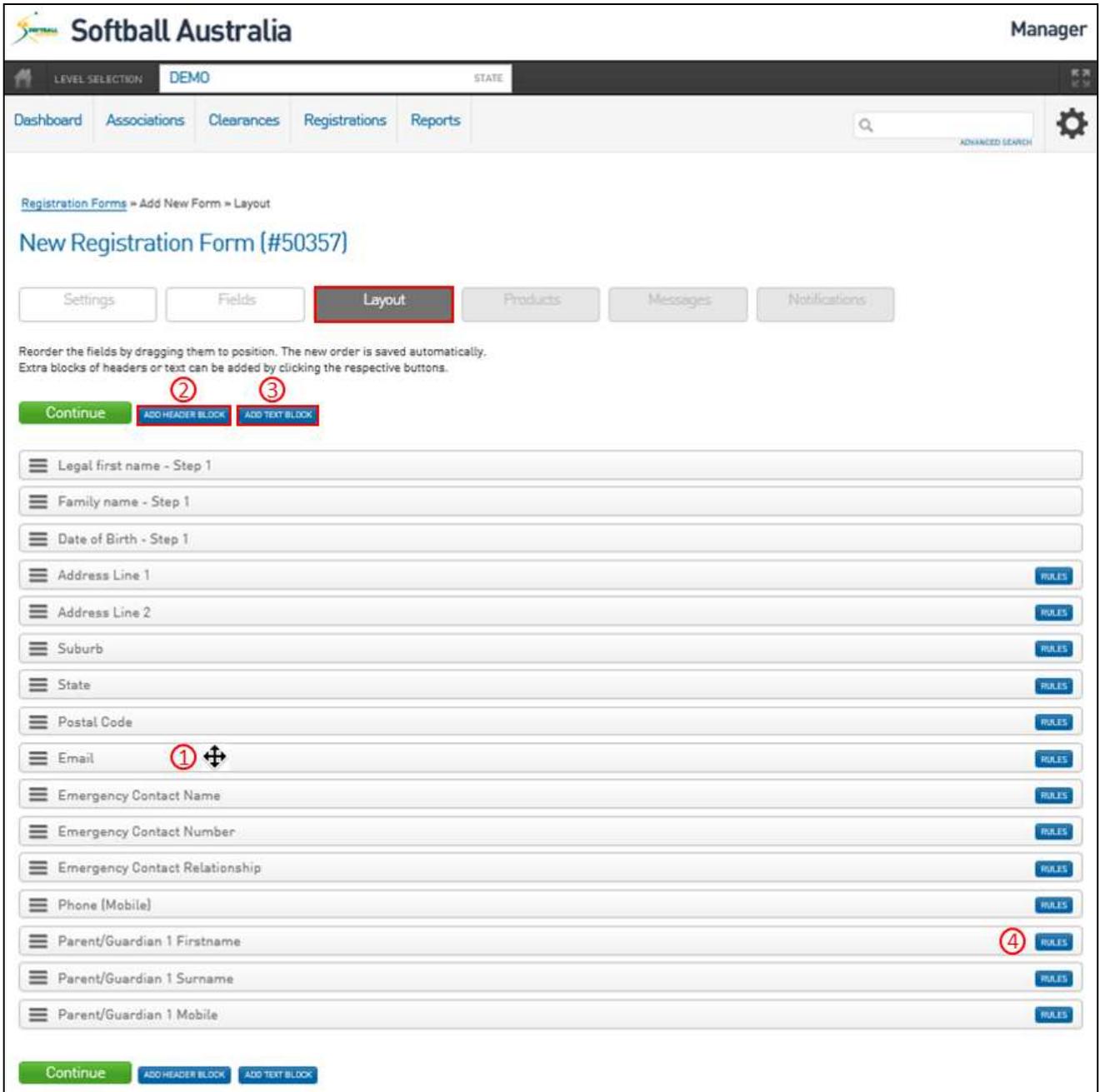
- 1 **Hidden:** Hidden will mean the field will not display on the registration form.
- 2 **Read Only:** means the field cannot be edited by the member but can be viewed.
- 3 **Editable:** means that the field will display on the registration form but it will be an optional field.
- 4 **Compulsory:** means that the registration form cannot be completed with this field being completed. It will be marked with an orange star on the registration form as a compulsory field.
- 5 **Add Only (Compulsory):** means a member must complete the field, but once they've updated the field they won't be able to change it. Generally, this field is used for date of birth, where someone's date of birth won't change – unlike a surname, address, phone number, which could change over time.



- 46 You will see that there are some fields that are already selected and you do not have the ability to hide or make the editable. These are four key fields used to create any record in the database:
- First Name
 - Surname
 - Date of Birth
 - Email address
- 47 If you are creating a NEW registration form, these are the only ones that are setup. If you are editing the National Registration Form, there are a number of others (ie address and contact details) that are already setup.
- 48 For normal registration into a softball competition, **use the National Registration Form** and edit it. For registration into a representative team (where you need additional information that has not been captured by the National form), create a new one.



Layout



Registration Forms » Add New Form » Layout

New Registration Form (#50357)

Settings Fields **Layout** Products Messages Notifications

Reorder the fields by dragging them to position. The new order is saved automatically. Extra blocks of headers or text can be added by clicking the respective buttons.

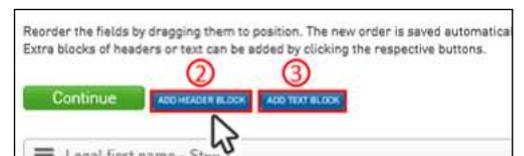
Continue **2** ADD HEADER BLOCK **3** ADD TEXT BLOCK

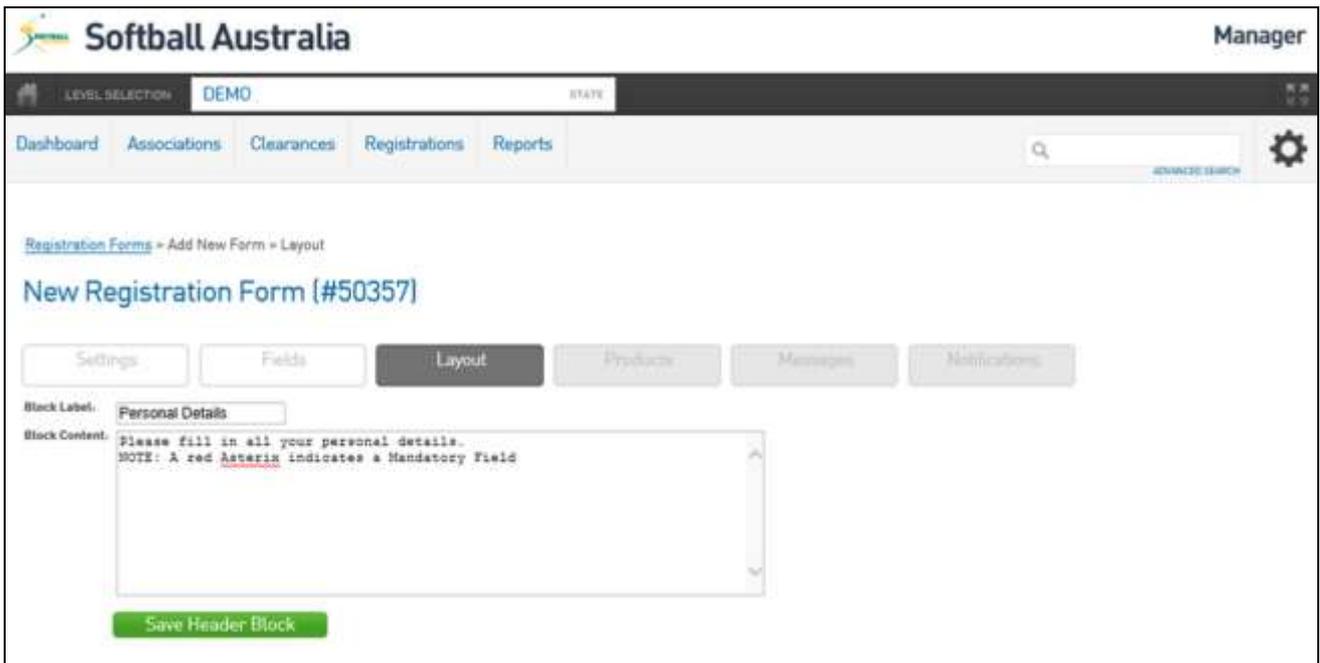
- Legal first name - Step 1
- Family name - Step 1
- Date of Birth - Step 1
- Address Line 1 **RULES**
- Address Line 2 **RULES**
- Suburb **RULES**
- State **RULES**
- Postal Code **RULES**
- Email **1**  **RULES**
- Emergency Contact Name **RULES**
- Emergency Contact Number **RULES**
- Emergency Contact Relationship **RULES**
- Phone (Mobile) **RULES**
- Parent/Guardian 1 Firstname **4** **RULES**
- Parent/Guardian 1 Surname **RULES**
- Parent/Guardian 1 Mobile **RULES**

Continue ADD HEADER BLOCK ADD TEXT BLOCK

49 This is where you layout the form and add headings or text to assist the members to understand what to do in the form.

- 1 Hover the mouse over any of the fields and to see there are four arrow move cursors. With the left mouse, click and drag any field up or down into the order that you would like the form to appear.
- 2 Click on the **Add a Header Block**, and you will open a new window in which you can type in Header information.





50 Type in a **Block Label**



IMPORTANT: if you have more than one **Heading Block** as the **Label** is the only way you will know where each one goes.

51 Type your message.

52 Click **Save Header Block**. This will save this block at the bottom of the field list.

53 The **Text Block** works the same way as the **Header Block**.



- 4 **Rules** – for some fields you can define rules based on Gender and minimum and maximum Date of Birth. This is good for fields like Guardian/Parent details. You can define so that these fields only appear when the applicant is under 18, and anyone over 18 does not see these fields when registering.

54 Click **Rules** on a field and you will see...

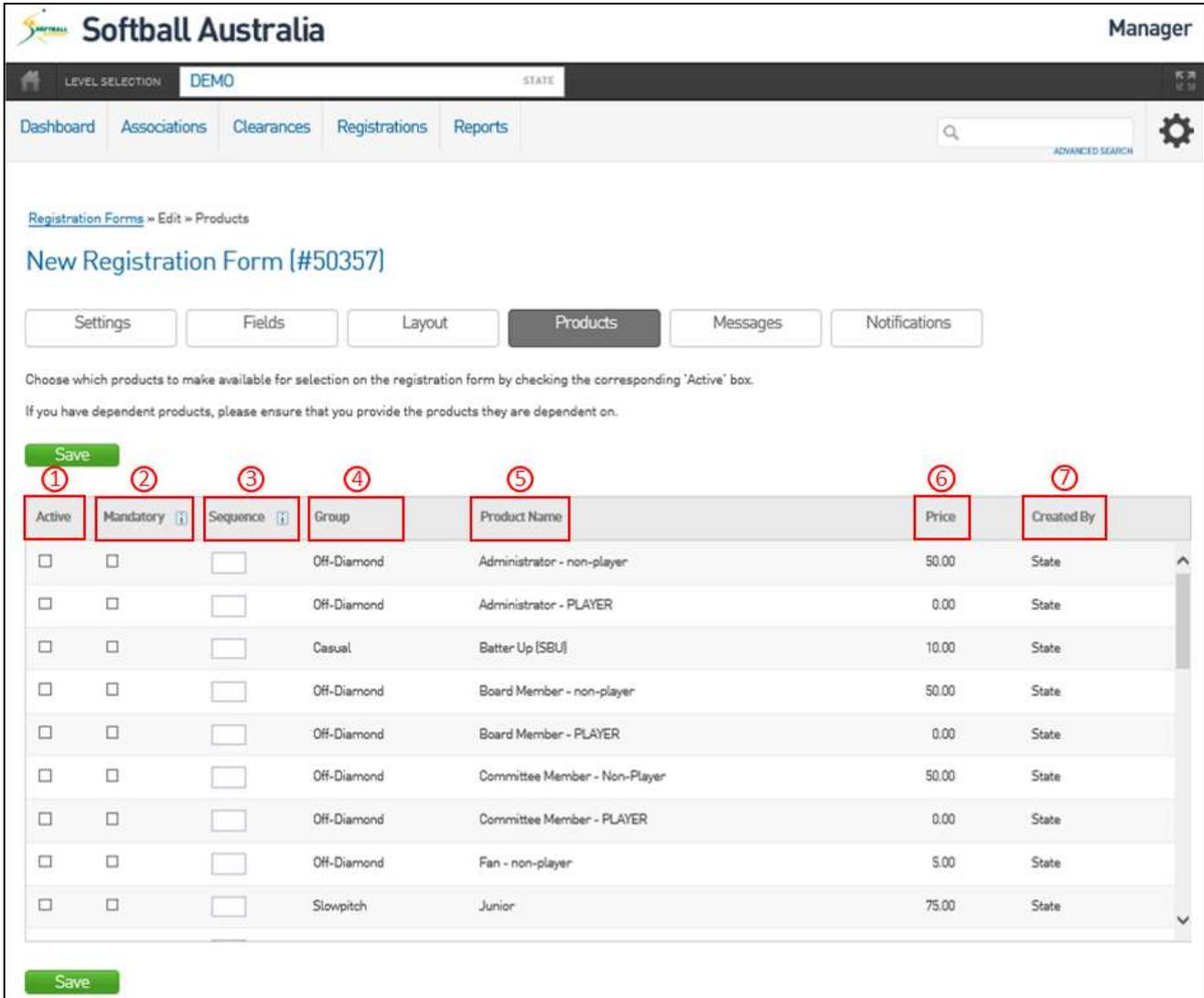
The screenshot shows the 'Softball Australia Manager' interface. The breadcrumb trail is 'Registration Forms > Add New Form > Layout'. The page title is 'New Registration Form (#50357)'. There are tabs for 'Settings', 'Fields', 'Layout', 'Products', 'Messages', and 'Notifications'. The 'Layout' tab is active. Below the tabs, there is a text prompt: 'Enter the conditions which must be met before the field is displayed on the regs form.' The configuration form includes a 'Save' button at the top left. The field name is 'Parent/Guardian 1 Firstname'. The 'Gender' field has a dropdown menu. The 'Minimum DOB' field has a date input, a 'Month' dropdown, and a radio button for 'Older end of Date Range (eg 01 - Jan - 1970)'. The 'Maximum DOB' field has a date input, a 'Month' dropdown, and a radio button for 'Younger end of Date Range (eg 31 - Dec - 2000)'. A 'Save' button is at the bottom left.

- a) Name indicates the field name that you are applying the rule to.
- b) You can define **Gender** specific rules for specific fields.
- c) You can define **Minimum** or **Maximum DOB** rules to the field.
- d) Once you have done this, click **Save** and you will return to the layout main screen.
- 5 On the main screen click **Continue** when you complete this tab.



Products

55 **Products** allows you to link previously created products to your registration form.



Registration Forms » Edit » Products

New Registration Form (#50357)

Settings Fields Layout **Products** Messages Notifications

Choose which products to make available for selection on the registration form by checking the corresponding 'Active' box.
If you have dependent products, please ensure that you provide the products they are dependent on.

Save

① Active	② Mandatory	③ Sequence	④ Group	⑤ Product Name	⑥ Price	⑦ Created By
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Off-Diamond	Administrator - non-player	50.00	State
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Off-Diamond	Administrator - PLAYER	0.00	State
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Casual	Batter Up [SBU]	10.00	State
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Off-Diamond	Board Member - non-player	50.00	State
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Off-Diamond	Board Member - PLAYER	0.00	State
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Off-Diamond	Committee Member - Non-Player	50.00	State
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Off-Diamond	Committee Member - PLAYER	0.00	State
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Off-Diamond	Fan - non-player	5.00	State
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Slowpitch	Junior	75.00	State

Save

- 1 Any products that you tick in the 'Active' box will display on your registration form.
- 2 If you tick the mandatory box on a product, then this product is a mandatory purchase on your registration form.
- 3 Product sequence allows you to order the products how you would like to see them in the registration form. To do this, number from 1 to 'n' in the order you'd like to have them. If you don't wish to sequence the products, leave this blank.
- 4 The group that the product was assigned to.
- 5 & 6 Product Name and Product Price.
- 7 Product created by this level in the hierarchy.

56 Click **Continue** when you complete this tab.



Messages

- 57 Allows you to add blocks of text throughout the registration form.
- 58 There are six tabs each which allows you to put in text at a specific point in the registration form, or on confirmation email and CC payment.

The screenshot shows the 'Softball Australia Manager' interface. At the top, there's a navigation bar with 'LEVEL SELECTION' set to 'DEMO' and 'STATE'. Below this is a menu with 'Dashboard', 'Associations', 'Clearances', 'Registrations', and 'Reports'. A search bar and a gear icon are also present. The main content area is titled 'Registration Forms » Edit » Text Messages' and 'New Registration Form (#50357)'. There are six tabs: 'Settings', 'Fields', 'Layout', 'Products', 'Messages' (which is active and highlighted), and 'Notifications'. Below the tabs, there's a 'Save' button and a description: 'Customise the text that displays at various stages of the registration process.' A row of six sub-tabs is shown: 'Choose Type', 'Initial Information', 'Full Information', 'Summary', 'Credit Card Payment', and 'Confirmation Email'. The 'Choose Type' tab is selected and highlighted with a red box. Below it, a text input field contains the text: 'This text will appear on the first page above the login section.' This text field is also highlighted with a red box.

- 59 To insert text, click in the box and type the message you'd like to see in the section on the form described immediately above the box.

This screenshot is a close-up of the sub-tab selection area from the previous image. The 'Initial Information' tab is now selected and highlighted with a red box. Below it, the text input field contains the text: 'This text will appear at the top of the 'Initial Information' page.' This text field is also highlighted with a red box.

Choose Type Initial Information **Full Information** Summary Credit Card Payment Confirmation Email

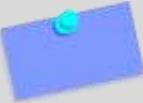
This text will appear at the top of the 'Full Information' page.

This text will appear at the bottom of the 'Full Information' page, above any Terms & Conditions or Opt ins.

This is where any Terms & Conditions should be entered, the smaller of the two boxes being for an optional header. The T&Cs will appear at the very bottom of the 'Full Information' page, under the product selection area.

Include an "I Agree to the above Terms & Conditions" mandatory checkbox?

60 Full Information has three sections, including one for Terms and Conditions.

 **NOTE:** Terms and Conditions can be entered in a new registration form, however for the national form, Ts and Cs are already in and cannot be changed.

Choose Type Initial Information Full Information **Summary** Credit Card Payment Confirmation Email

This text will appear at the bottom of the 'Summary' section.

Choose Type Initial Information Full Information Summary **Credit Card Payment** Confirmation Email

This text will appear at the top of the credit card payments page.

Choose Type Initial Information Full Information Summary Credit Card Payment **Confirmation Email**

This text will appear at the bottom of the registration confirmation email containing participants username & password.

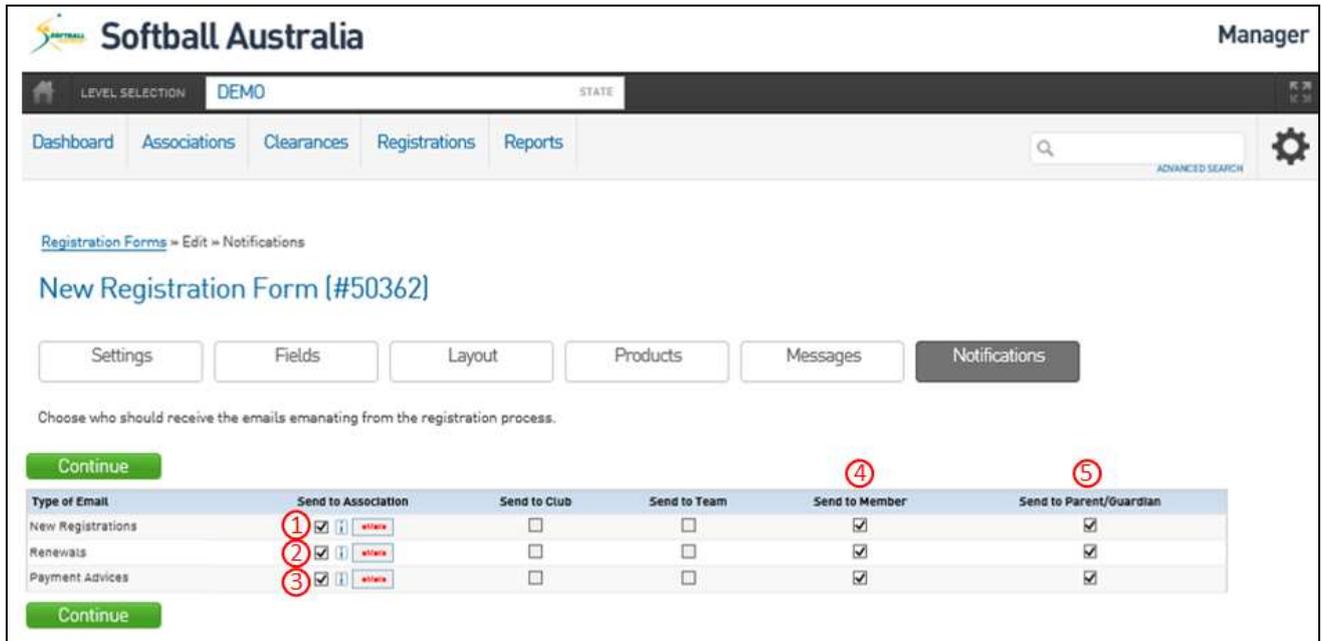
61 Click **Continue** when you complete this tab.





Notifications

62 **Notifications** allow you to choose who receives notification emails. You can choose whether to send the email to different levels such as associations, clubs, teams, members and parent/guardians, by ticking the box under each group.



Type of Email	Send to Association	Send to Club	Send to Team	Send to Member	Send to Parent/Guardian
New Registrations	1 <input checked="" type="checkbox"/> <small>edit</small>	<input type="checkbox"/>	<input type="checkbox"/>	4 <input checked="" type="checkbox"/>	5 <input checked="" type="checkbox"/>
Renewals	2 <input checked="" type="checkbox"/> <small>edit</small>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Payment Advices	3 <input checked="" type="checkbox"/> <small>edit</small>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- 1 If ticked, **New Registration** emails will be sent to all association contacts with the **Registration** responsibility listed against their name.
- 2 If ticked, **Renewal** emails will be sent to all association contacts with the **Registration** responsibility listed against their name.
- 3 If ticked, **Payment Advice** emails will be sent to all association contacts with the **Finance and Payments** responsibility listed against their name.
- 4 If ticked, the member will receive the emails for the respective **Registration, Renewal or Payment Advice**.
- 5 If ticked, and Parent/Guardian information is available, then the listed Parent/Guardian will receive emails for the respective **Registration, Renewal or Payment Advice**.

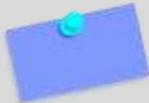
63 Click **Continue** when you complete this tab.

64 Click [Registration Forms](#) in the breadcrumbs at the top of the page.





Reviewing a Registration Form



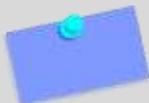
NOTE: This facility is only available at association and club levels.

65 Click on Registrations menu and select Registration Forms

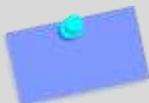
The screenshot shows the Softball Australia Manager interface. At the top, there is a navigation bar with the Softball Australia logo and the word "Manager". Below this is a "LEVEL SELECTION" dropdown menu set to "DEMO Association 1". A main navigation menu includes "Dashboard", "Members", "Competitions", "Clubs", "Teams", "Communications", "Registrations", and "Reports". The "Registrations" menu is highlighted. Below the navigation menu, the page title is "Registration Forms". Underneath, there is a section titled "Parent Body Forms" with a table listing forms. The first entry is "Softball Australia National Registration Form (#49412)" with a "Member to Club" label and buttons for "SET PRIMARY", "View", and "Edit". The "View" button is highlighted with a red box. At the bottom left, there is a green "Add New Form" button.

66 Click on View on the right hand side of the form you wish to view.

67 This will open the form as it will be seen by the member when they go to it online.



NOTE 1: If you go through the form and fill it out AND select CONFIRM at the end, then you will have created a record in the live system. RECORDS can be made inactive, but they cannot be removed. Therefore you must be very careful when using this facility to check the form.



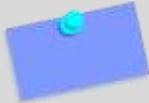
NOTE 2: This is a good way for a registrar to manually ADD a new member to the system. We will be capturing all the details exactly the same way as we do for people registering online and this ensures continuity of data entry and minimises any mismatching of data fields.



Online Payments

There are two components to the online payment system: **Payment Configuration** and **Payment Splits**.

Payment Configuration is the area you enter to setup your state, association or club to accept online payment. **Payment Splits** allows you to define how the money can be distributed by the bank direct into each levels accounts.

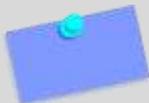


NOTE: If you are going to use payment online, then you **MUST** have payment splits to be able to add to the products.

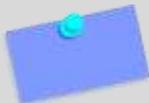
Payment Configuration

68 Before starting to fill out the **Payment Configuration** form, you will need to ensure that you have the following information

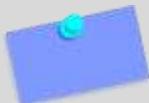
- Legal Trading Name of Organisation
- Street Address / Contact Details (cannot be a PO BOX)
- Australian Company Number (ACN) if applicable
- Australian Registered Business Number (ARBN) if applicable
- Contact Name / Phone / Email of two committee members
- Electronic copy of clubs bank statement showing BSB and Account Number
- Transactional information



NOTE 1: some of the contact information may be pre populated from the details that you have submitted in setting up your club or association details.



NOTE 2: If a member requests for a refund, this has to be handled manually, because the online payment system does not hold credit card details once the payment transaction has gone through. Clubs may want to put a policy outlining under what circumstances a refund will be handled, and what fees are included/excluded.



NOTE 3: There are Fees and Charges for online transactions. When the total transaction value is between \$0 and \$25 there is a \$1 processing fee per transaction. Above \$25 the processing fee is 3.9%.

A transaction is a single online payment at time of registration, which could consist of one or many products in that one transaction.

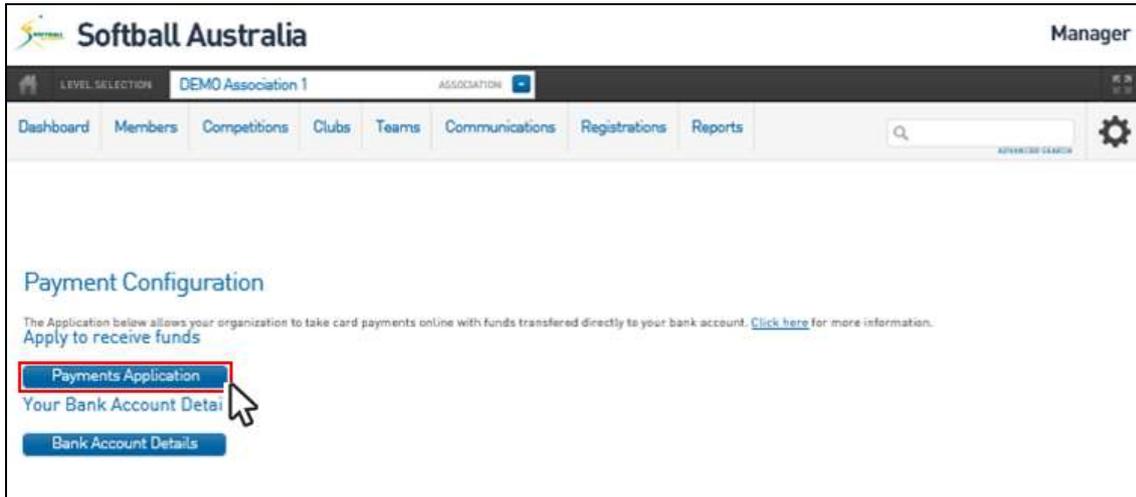
The processing fee model can be setup to be either:

- *Inclusive* – where the 3.9% is included in the cost of the transactions, ie if the transaction is \$100, then the member pays \$100 and the Club/Association receives \$96.10
- *User Pays* - where the 3.9% is added to the cost of the transaction, ie if the transaction is \$100, then the member pays \$103.90 and the Club/Association receives \$100.

All fields marked with a red Asterix are Mandatory.



69 Click **Registrations** and select **Payment Configuration**.



70 Click **Payments Application**.

71 In applying to be able to do transactions online, you are entering an agreement with NAB to be a Sub-Merchant on their network. The detailed application process is shown below on three screen shots.

Payment Application

The person filling out this form (applicant) must be an approved applicant by the executive of the organisation. If the applicant is also one of the nominated office bearers, the information needs to be repeated as such.

As part of this application process, you will need to provide a scanned copy of your organisation's bank statement. Please make sure you have this file available before beginning this process.

Organisation Details

Legal (Trading) Name of Organisation:

Have you previously applied for merchant status with NAB through Fox Sports Pulse for this Legal Name?:

Shortened Business Name: 20 characters maximum.

Street Address 1: This may be your club room or place where you play. It cannot be a PO Box. Nothing will be posted here.

Street Address 2:

Suburb: Anniebrook

State: ▼

Postal Code: 9101

Organisation Phone: 09 8996 2314

Is your organisation incorporated?: If Yes then an ACN or ARBN (or New Zealand equivalent) must be supplied.

ACN (Australian Company Number):

ARBN (Australian Registered Business Number): Used for a foreign company registered in Australia

Is your organisation registered for GST?: If Yes then an ABN must be supplied. (Not applicable to New Zealand)

ABN:

What does your Organisation do?: ▼

If other, please list here:

Applicant

Applicant Title:

Applicant First Name: o

Applicant Middle Initial:

Applicant Family Name: o

Applicant Position: o

Applicant Phone: o

Applicant Email: o

Office Bearer 1

First Name: o

Family Name: o

Position: o

Phone: o

Email: o

Office Bearer 2

First Name:

Family Name:

Position:

Phone:

Email:

Transactional Information

Note: The following information is required by the bank to assess risk:

How many members does your organisation have?: o

What is your average registration fee?: o

What is your organisation's total annual income?: o

How much revenue do you anticipate will go through this gateway?: o

Bank Account Details:

BSB : No Spaces

Account Number : No Spaces

Account Name :

Note: New Zealand customers should enter first 6 digits in bsb box and remaining numbers in account number box.

Fields prepopulated with data from Association contact details in the database. These can be edited if you wish to use another office bearer

Other Details

Credit Card Descriptor: Note: This is the Descriptor that payees will see on their Credit Card statement. It will begin with . The field has maximum 22 characters, of which 21 is allowed for your custom Descriptor

Accounts Email: Note: This is where your invoices will be sent.

Processing fee model: **Inclusive Model** Where you select either an Inclusive or User Pays Processing fee model
The Inclusive model method means that the processing fee is included within your pricing, therefore you need to calculate the price of your products to include the processing fee. If your products value is below the threshold a 'processing fee' may be added.
The User Pays method means that the processing fee is displayed to the person making the payment, and it is included "on top" of the total.
[Click here for more detail](#)

Promotional Code: Note: If you have a promotional code, please enter it here.

Parent Body Merchant Code: Please fill in the following two fields only if you have been provided a merchant code by your parent body.

Parent Body Merchant Name:

Terms & Conditions

1. DEFINITIONS

Unless the contrary intention appears, the following words have these meanings in this Agreement:

Banking Day means a day on which banks are open for general banking business in Melbourne Australia except for Saturdays, Sundays and National Public Holidays. Card Schemes means, unless otherwise agreed by the parties, Visa and MasterCard.

By submitting this application form, you agree to be bound by the terms and conditions. If you are submitting this application on behalf of an association, club or team, you are bound to the terms both in your individual capacity and as an agent of the governing body, association, club or team, and your actions will bind the governing body, association, club or team. You represent and warrant to SportingPulse that you have the capacity and authority to enter into this agreement on your own behalf, as well as on behalf of the relevant governing body, association, club or team.

Please Note: There is a fee of \$65 for your organisation to be accepted and set up as a sub-merchant. You will receive an invoice for this one off fee. A percentage fee on each transaction will be charged with a minimum of \$1.00. NOTE: as part of the contract, this fee is waived for all affiliated Softball States, Associations and Clubs.

Documentation

To validate your organisational status, please provide a scanned copy of your latest bank statement.

Please ensure that the attached bank statement includes the following, and that they are the same as the bank account details given

1. Account Name
2. Account No.
3. BSB

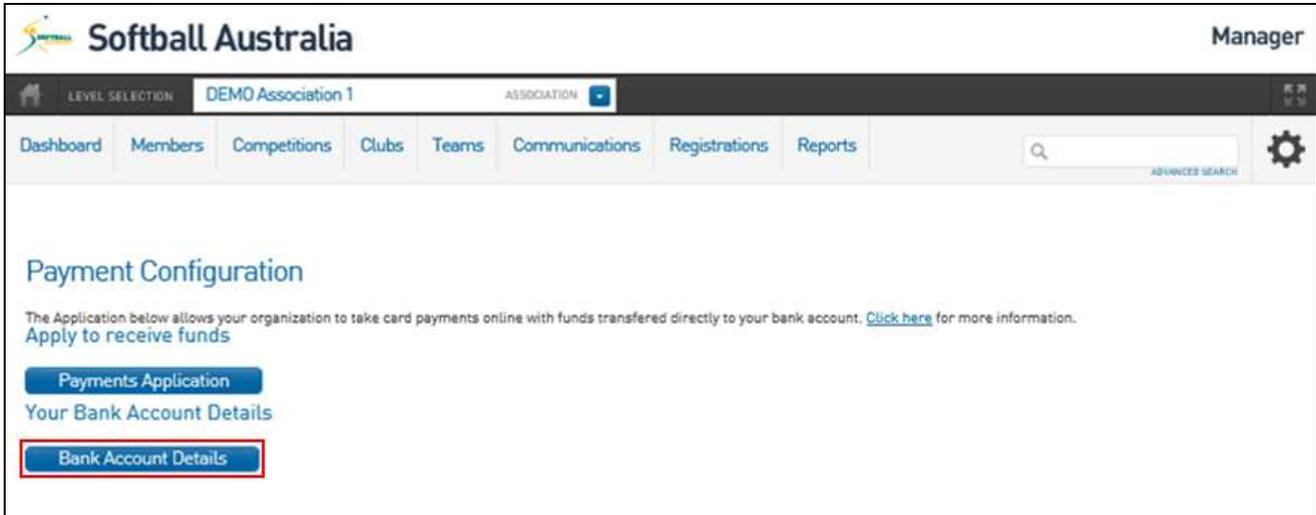
Browse... You need to upload a softcopy of a bank statement containing Account Name, Account number and BSB, and that it is the same as entered into the application.

When complete, please click on the I Agree button

72 Your details will now be passed onto Fox Sports Pulse and you will be notified once your Sub-merchant set-up has been approved. Once approved, you will have the ability to start receive payments.

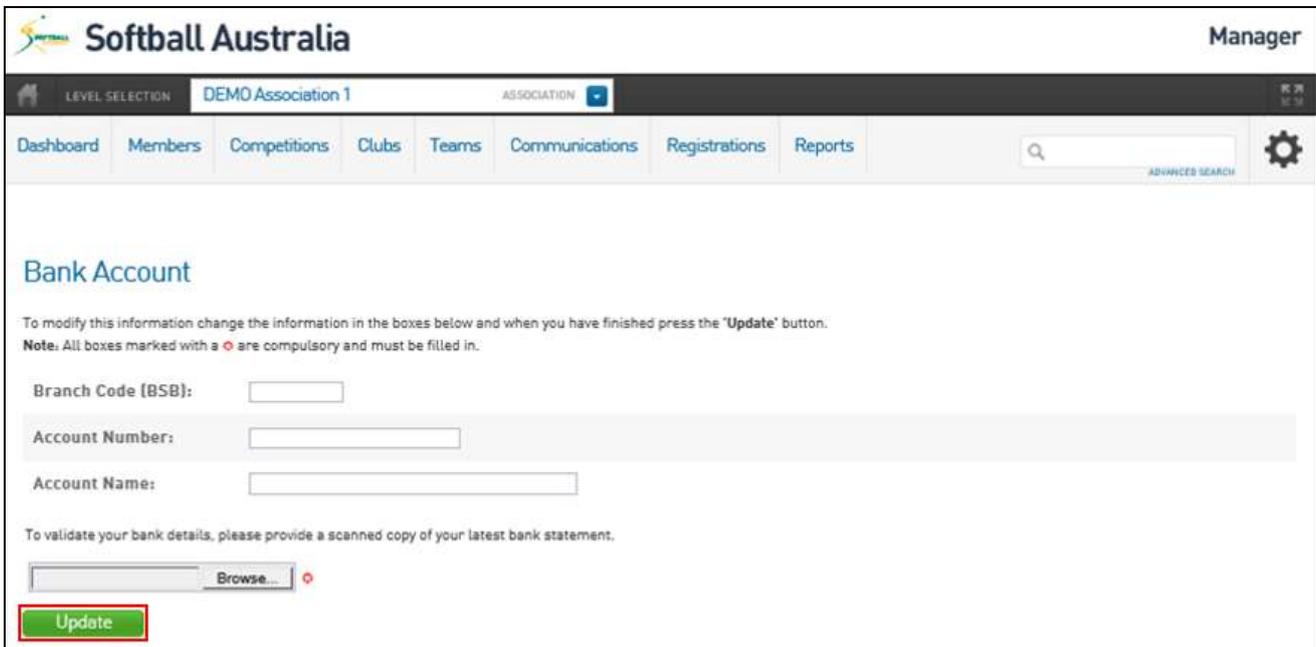
Setup Bank Account Details

73 Click [Registrations](#) and select [Bank Account Details](#).



The screenshot shows the 'Softball Australia Manager' interface. The top navigation bar includes 'Dashboard', 'Members', 'Competitions', 'Clubs', 'Teams', 'Communications', 'Registrations', and 'Reports'. The 'Registrations' menu is active. Below the navigation bar, the 'Payment Configuration' section is displayed. It contains a 'Payments Application' button and a 'Your Bank Account Details' section. The 'Bank Account Details' button in the 'Your Bank Account Details' section is highlighted with a red box.

74 You will then be prompted to fill in your bank account details. Ensure these are correct as they will be locked once the update button is selected. If you need to make changes, please contact Fox Sports Pulse to have your account unlocked.



The screenshot shows the 'Softball Australia Manager' interface with the 'Bank Account' form. The form includes fields for 'Branch Code (BSB)', 'Account Number', and 'Account Name'. Below these fields, there is a note: 'To validate your bank details, please provide a scanned copy of your latest bank statement.' and a 'Browse...' button. The 'Update' button at the bottom of the form is highlighted with a red box.

75 Select [Update](#). The account setup is complete and monies will now be transferred into your selected bank account at the nominated time.

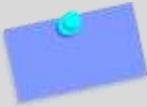


Process a Test Payment

- 76 To process a test payment, you can either create a “test” product with a nominal value (eg \$1) and add it to your form, or you can have someone complete the process of registering using your products already setup.

Check to see if the payment was successful

- 77 A payment record will be created as soon as the payment is created. A couple of simple ways to check for this record is to go to the member’s record and check their transactions. Another way is to run a Member report, and include information from the Transaction section of the report (eg Amount due, Date, and Payment Type).



NOTE: Funds are not sent directly to your bank account! NAB users will not see these for a period of three business days with other account users having their money transferred through weekly.





Payment Splits

78 **Payment Splits** allows a member to pay for a product online, and for the proceeds of that payment to be split into a maximum of six different amounts and deposited into the relevant accounts based on the information that you put into this section.

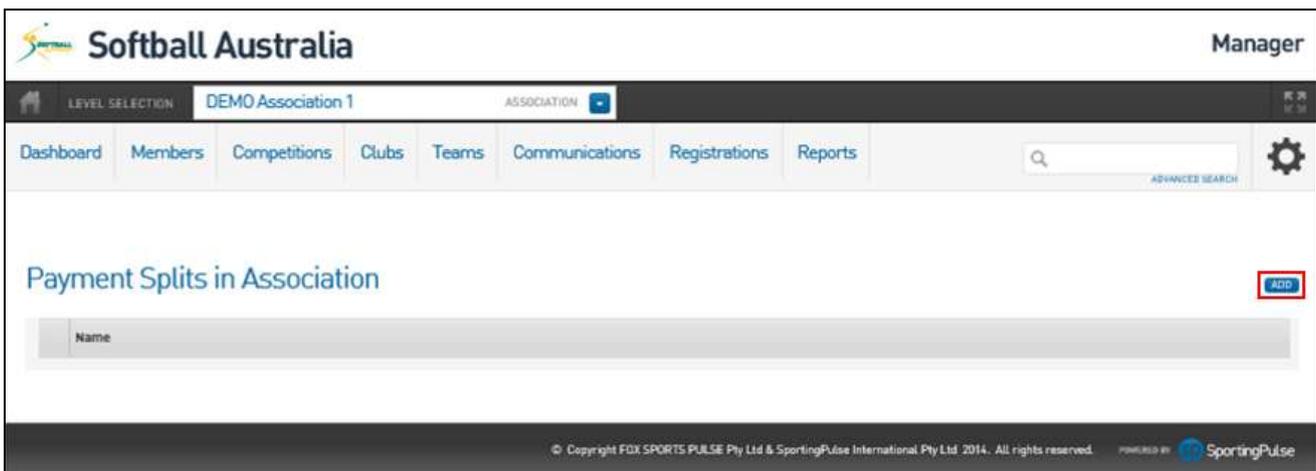
Example

A member purchases a \$100 product. The state body requires \$15 from each member to be paid to them. The association requires \$35 from each member.

We can configure the system in this area so that when the \$100 is received by the bank, they send \$15 directly to the state account, \$35 to the association account and the remainder to the club account.

79 It is MANDATORY that if you wish to accept payments online, then you have to set up one or more payment splits for the products to follow. It is necessary for any hierarchy that wants to receive their monies online to have turned on online payments for this to happen.

80 Click [Registrations](#) and select [Payment Splits](#).



The screenshot shows the 'Softball Australia Manager' interface. At the top, there is a navigation bar with the 'Softball Australia' logo and the word 'Manager'. Below this is a 'LEVEL SELECTION' dropdown menu set to 'DEMO Association 1' and an 'ASSOCIATION' dropdown menu. A main navigation menu includes 'Dashboard', 'Members', 'Competitions', 'Clubs', 'Teams', 'Communications', 'Registrations', and 'Reports'. A search bar with a magnifying glass icon and the text 'ADVANCED SEARCH' is located to the right of the navigation menu. The main content area is titled 'Payment Splits in Association' and features a large text input field labeled 'Name'. A red box highlights a small blue button with the text 'ADD' in the top right corner of the input field. At the bottom of the page, there is a footer with copyright information: '© Copyright FOX SPORTS PULSE Pty Ltd & SportingPulse International Pty Ltd 2014. All rights reserved.' and a logo for 'SportingPulse'.

81 Click **ADD** at the right hand side of the form.

Softball Australia
Manager

LEVEL SELECTION DEMO Association 1 ASSOCIATION

Dashboard
Members
Competitions
Clubs
Teams
Communications
Registrations
Reports

⚙️

Add Payment Split

Enter up to 5 splits plus the compulsory Remainder split. When finished, press the 'Update' button.

Split Name:
← Create a logical name for the payment split methodology

Split 1

Method

Amount (\$)

Percentage %

Recipient

National

State

Region

Zone

Association

Club

Split 2

Method

Amount (\$)

Percentage %

Recipient

Split 3

Method

Amount (\$)

Percentage %

Recipient

Split 4

Method

Amount (\$)

Percentage %

Recipient

Split 5

Method

Amount (\$)

Percentage %

Recipient

Remainder (Compulsory)

Recipient

← This is mandatory, as it defines who receives the remaining amount of funds once the splits have been completed

Update

Five Split methods to work with.

Each works exactly the same with you selecting whether you want a defined \$ value, or a percentage of total. Once this is determined all you need to do is define who receives the money from the pull down list.

NOTE 1 - If you make a mistake click on the trash bin and that Split Method will start clean again.

NOTE 2 - You need a minimum of one Split method. You do not have to have information in all five.

82 Click **Update** when you have finished updating the information.

83 Continue this process until you have created all the payment split options you require.