



Softball Australia

mySoftball Community Training

Module 1

C) – Navigating the Menus

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Updated 5 June 2015



Different Menus at Different Levels

State

Softball Australia Manager

LEVEL SELECTION DEMO STATE

Dashboard Associations Clearances Registrations Reports

DEMO

Details [edit](#)

Address
Demo state address 1
Demo state address 2

Association

Softball Australia Manager

LEVEL SELECTION DEMO Association 1 ASSOCIATION

Dashboard Members Competitions Clubs Teams Communications Registrations Reports

DEMO Association 1

Details [edit](#)

Address
PO Box 123
Anniebrook

Contacts [edit](#)

President (PRIMARY CONTACT)
Alfred Smith
0400 123 456

Vice President
Jan Smith
0400 456 789

Club

Softball Australia Manager

LEVEL SELECTION Club 1 CLUB

Dashboard Members Teams Communications Reports

Club 1

Details [edit](#)

Address
Club 1 address line 1
Club 1 Suburb
Demo, Club 1 PC

Contacts [edit](#)

President (PRIMARY CONTACT)
Marcel Marceau
0400 000 000
silence@mime.com

Secretary
Chew Backa
0409 999 999
turry@space.com.au

Notifications
The following items require your attention:
[Collect your fees online-Find out more.](#)



Tips – Navigation

- 1 To go back to the level you have logged in as (ie state level registrar going back to the state 'home' page; Association registrar going back to the Association 'home' page), regardless of where you currently are, click on the **Home** icon (1) in the top left hand corner of the screen.
- 2 To go back to the 'home' page of the level you are currently on, click on **Dashboard** (2) underneath the home icon at the top left of the screen.
- 3 To select the level you wish to go back to (if you have navigated down the hierarchy), click on the arrow to the right of the **LEVEL SELECTION** bar (3), and you will see a pulldown list (4) of options available to you based on your login level and where you are currently located in the hierarchy.
- 4 In the example below, we are currently in the Reports section at Club 1 level. We are signed in at State level in the hierarchy.
 - 4.1 If we click on the home icon (1), we will be taken back to the 'home' page at state level.
 - 4.2 If we click on the dashboard menu, we will be taken back to the 'home' page at Club 1 level.
 - 4.3 If we click on the down arrow in the **LEVEL SELECTION** (3), a list appears, with Club 1 at top (this is the level we are currently at), and we can select to go back to DEMO Association 1 level, or Demo State Level.

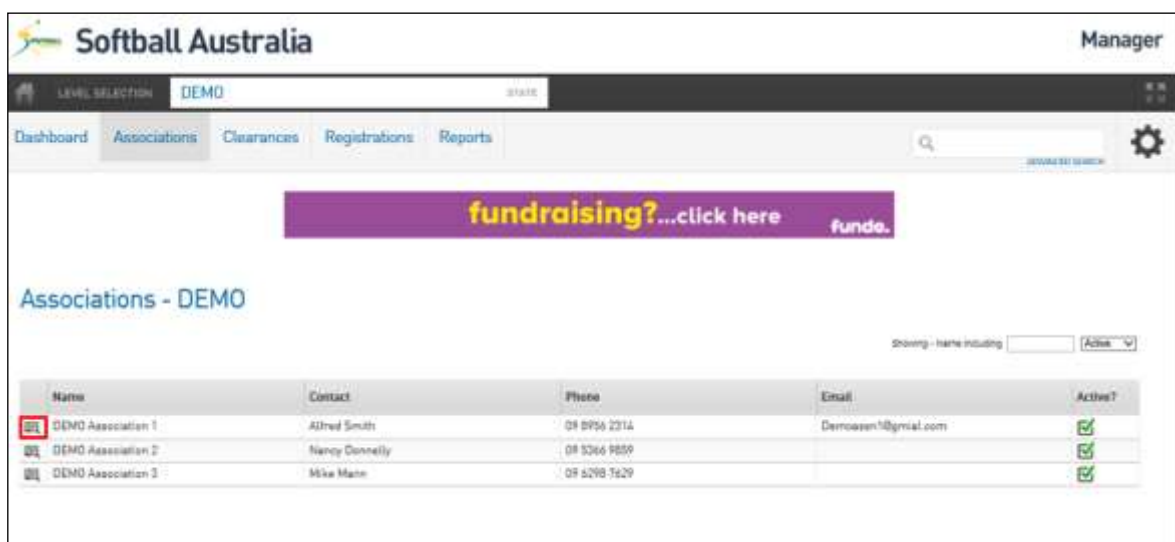


State Level menus




- 5 Click on [Dashboard](#) to go back to the front page of the level you are currently in, ie if you have state level access, and have navigated to club level and are running reports, click on Dashboard to return to the club level 'home' page.

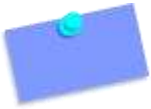


- 6 Click on [Associations](#) and a full list of associations in this state's hierarchy will appear.
- 7 To select an association to go to, click on the magnifying glass icon to the left of the association's name and you will go to that association's home page.



A screenshot of the 'Associations - DEMO' page. At the top, the 'Softball Australia' logo is on the left and 'Manager' is on the right. Below the navigation bar, there is a purple banner that says 'fundraising?...click here' with a 'fundo.' link. The main content area is titled 'Associations - DEMO'. Below the title, there is a search bar and a 'Showing - items including' dropdown. A table lists three associations:

Name	Contact	Phone	Email	Active?
 DEMO Association 1	Alfred Smith	08 8956 2314	Demoasen1@gnral.com	<input checked="" type="checkbox"/>
 DEMO Association 2	Nancy Donnelly	08 8366 8859		<input checked="" type="checkbox"/>
 DEMO Association 3	Mike Mann	08 8298 7a29		<input checked="" type="checkbox"/>



NOTES

- 1 If you need to add a new association to your state, you must contact Softball Australia and provide details (name, location, contact information) who will arrange for the association to be added to the hierarchy list, and send information to the contact person so that they can start the process of getting access and training.
- 2 If you have an association that has merged with another association, or they are no longer active, you must make this association inactive in the hierarchy.
- 3 To do this, go to the right of the list of associations and you will see an **Active?** field.
- 4 Click twice on the 'tick' to deactivate this for the association that you are removing from the hierarchy, and then click twice on the **Active?** field heading to save this change.

Softball Australia Manager

LEVEL SELECTION: DEMO STATE

Dashboard Associations Clearances Registrations Reports

fundraising?...click here funde.

Associations - DEMO

Name	Contact	Phone	Email	Active?
DEMO Association 1	Alfred Smith	09 8956 2314	Demoassn1@gmail.com	<input checked="" type="checkbox"/>
DEMO Association 2	Nancy Donnelly	09 5266 9859		<input checked="" type="checkbox"/>
DEMO Association 3	Mike Mann	09 6298 7629		<input checked="" type="checkbox"/>

Showing - Name including [] [v]

1. Click twice to deactivate the 'tick'

2. Click twice to save this change

Softball Australia Manager

LEVEL SELECTION: DEMO STATE

Dashboard Associations Clearances Registrations Reports

fundraising?...click here funde.

Associations - DEMO

Name	Contact	Phone	Email	Active?
DEMO Association 2	Nancy Donnelly	09 5266 9859		<input checked="" type="checkbox"/>
DEMO Association 3	Mike Mann	09 6298 7629		<input checked="" type="checkbox"/>

Showing - Name including [] [v]

Active Inactive All

- 5 To reactivate an association change the 'view' from **Active** to **All**.
- 6 You will now see the all associations (active and inactive).

Showing - Name including [] [v]

Name	Contact	Phone	Email	Active?
DEMO Association 2	Nancy Donnelly	09 5266 9859		All
DEMO Association 3	Mike Mann	09 6298 7629		All
DEMO Association 1	Alfred Smith	09 8956 2314	Demoassn1@gmail.com	All



- 7 Click on the inactive association in the **Active?** field, and click again to get the tick in the box.
- 8 Click on the **Active?** field to save the changes.

Showing: name including All

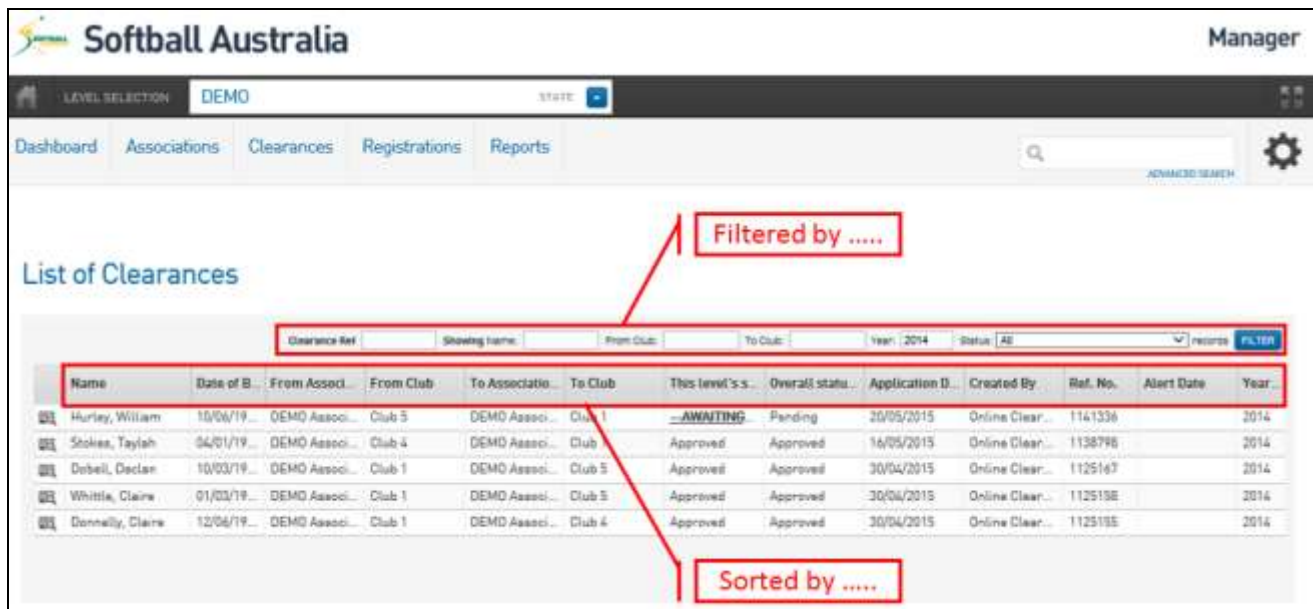
Name	Contact	Phone	Email	Active?
<input type="checkbox"/> DEMO Association 2	Nancy Donnelly	09 5364 9899		<input checked="" type="checkbox"/>
<input type="checkbox"/> DEMO Association 3	Mike Mann	09 4299 7629		<input checked="" type="checkbox"/>
<input type="checkbox"/> DEMO Association 1	Ajihad Smith	09 2956 2314	Demoasen1@gmail.com	<input type="checkbox"/>

1. Click twice to reactivate the 'tick'...should be green
2. Click on the Active? field to save this change





- 9 This option displays ALL online clearances below the state level.
- 10 Click on [List Online Clearances](#) and you will see the full list of clearances.
- 11 These can be filtered by 6 fields:
 - 1 Clearance Reference Number
 - 2 Showing Name
 - 3 From Club
 - 4 To Club
 - 5 Year (of clearance)
 - 6 Status (All, Approved, Pending, Denied, --Awaiting Approval from this Level--, and Cancelled)
- 7 The list can be sorted by clicking on any of the column headings.





- 8 To see the details of each individual Permit/Clearance, click on the magnifying glass icon to the left of the record you wish to view.

The screenshot shows the 'Softball Australia Manager' interface. At the top, there's a navigation bar with 'LEVEL SELECTION' set to 'DEMO' and a 'STATE' dropdown. Below this are tabs for 'Dashboard', 'Associations', 'Clearances', 'Registrations', and 'Reports'. A search bar and a settings gear icon are on the right. The main content area is titled 'List of Clearances' and features a table with the following data:

Name	Date of B...	From Associ...	From Club	To Associati...	To Club	This level's s...	Overall statu...	Application D...	Created By	Ref. No.	Alert Date	Year...
Hurley, William	10/06/19...	DEMO Associ...	Club 5	DEMO Associ...	Club 1	AWAITING	Pending	20/05/2015	Online Clear...	1141336		2014
Stokes, Taylah	04/01/19...	DEMO Associ...	Club 4	DEMO Associ...	Club 1	Approved	Approved	16/05/2015	Online Clear...	1138798		2014
Dobell, Declan	10/03/19...	DEMO Associ...	Club 1	DEMO Associ...	Club 5	Approved	Approved	30/04/2015	Online Clear...	1125167		2014
Whittle, Claire	01/03/19...	DEMO Associ...	Club 1	DEMO Associ...	Club 5	Approved	Approved	30/04/2015	Online Clear...	1125138		2014
Donnelly, Claire	12/06/19...	DEMO Associ...	Club 1	DEMO Associ...	Club 4	Approved	Approved	30/04/2015	Online Clear...	1125135		2014

- 9 You can now see all the individual's permit/clearance records but, most importantly you will see the status of the permit/clearance at the end.



Clearance Summary

To modify this information change the information in the boxes below and when you have finished press the 'Update Clearance' button.

Note: All boxes marked with a * are compulsory and must be filled in.

Details

Clearance Ref. No.:	1125167
Application Date:	30/04/2015
Member being Cleared:	Dobell Declan
Date of birth:	10/03/1942
Address Suburb:	Webbs Creek
Address State:	DEMO
From Club:	Club 1
From Association:	DEMO Association 1
To Club:	Club 5
To Association:	DEMO Association 2
Permit Type:	2. Local Interchange
Permit Date From:	30/04/2015
Permit Date to:	<input type="text" value="30/09/2015"/>
Clear as Player Active ?:	Yes
Clear as Coach Active ?:	No
Clear as Match Official Active ?:	No
Clear as Misc Active ?:	No
Clear as Volunteer Active ?:	No
Overall Clearance Status:	Approved
Total Fees Applied:	\$0.00
Total Development Fees Applied:	\$0.00
Clearance Priority:	Normal
Reason for Clearance:	
Reason for Clearance:	playing with son
Additional Information:	<input type="text" value="playing a season of sundays with his son"/>

[Update Clearance](#)

Clearance Approval Details

Name	Clearance Status	Approved By	Alert Date	Denial Reason	Player Financial ?	Player Suspended ?	Fee Applied	Additional Information	Time Updated
Club 1	Approved	Matthew Horne			Financial	NOT Suspended	-		30/04/2015
DEMO Association 1	Approved	Matthew Horne			Financial	NOT Suspended	-		30/04/2015
DEMO	Approved	matthew horne			Financial	NOT Suspended	-		30/04/2015
DEMO Association 2	Approved	matthew horne			Financial	NOT Suspended	-		30/04/2015
Club 5	Approved	matthew horne			Financial	NOT Suspended	-		30/04/2015



- 10 If you can see **This Level's Status --Awaiting Approval from this Level--**, you need to click on this field to open an editable Permit/Clearance.

Softball Australia Manager

LEVEL SELECTION: DEMO STATE: [v]

Dashboard Associations Clearances Registrations Reports

List of Clearances

Name	Date of B...	From Associ...	From Club	To Associatio...	To Club	This level's s.	Overall statu...	Application D...	Created By	Ref. No.	Alert Date	Year...
Hurley, William	10/06/19...	DEMO Associ...	Club 5	DEMO Associ...	Club 1	AWAITING	Pending	20/05/2015	Online Clear...	1141336		2014
Stokes, Taylah	04/01/19...	DEMO Associ...	Club 4	DEMO Associ...	Club 1	Approved	Approved	16/05/2015	Online Clear...	1138798		2014
Dobell, Declan	10/03/19...	DEMO Associ...	Club 1	DEMO Associ...	Club 5	Approved	Approved	30/04/2015	Online Clear...	1125167		2014
Whittle, Claire	01/03/19...	DEMO Associ...	Club 1	DEMO Associ...	Club 5	Approved	Approved	30/04/2015	Online Clear...	1125158		2014
Donnelly, Claire	12/06/19...	DEMO Associ...	Club 1	DEMO Associ...	Club 4	Approved	Approved	30/04/2015	Online Clear...	1125155		2014

You will open up Permit/Clearance and see....

Fill out the fields, noting that **Clearance Status** and **Approved By** are both mandatory.

Clearance

To modify this information change the information in the boxes below and when you have finished press the 'Update Clearance' button.
 Note: All boxes marked with a ***** are compulsory and must be filled in.

Details

Clearance Ref. No.: 1138798

Member being Cleared: Stokes Taylah

Date of birth: 04/01/1998

Address Suburb: JIMBLESIDE

Address State: DEMO

From Club: Club 4

From Association: DEMO Association 2

To Club: Club 1

To Association: DEMO Association 1

Permit Type: 2 Local Interchange

Permit Date From: 10/05/2015

Permit Date To: 25/05/2015

Clearance Status: * ← Approve or Deny

Approved By: * ← Name of person making the decision

Reason for Denial: ← Reason if the request is denied

Fee involved: ← Fees (if any) for the handling of a Permit or Clearance

Development Fee: £00

Alert Date: ← Currently not setup for Softball.

Additional Information: ← Any additional information regarding the decision should be put here

Development Fee:

Player Financial ? : ← Please answer this (Financial/Not Financial)

Player Suspended ? : ← Please answer this (Suspended/Not Suspended)

Reference Number at this level: ← If you have a reference number at this level.

Clearance Approval Details

Name	Clearance Status	Approved By	Alert Date	Denial Reason	Player Financial ?	Player Suspended ?	Fee Applied	Additional Information	Time Updated
Club 4	Pending								
DEMO Association 2	Pending								
DEMO	Pending								
DEMO Association 1	Pending								
Club 1	Pending								



11 Once you have completed the form, click **Update Clearance**.

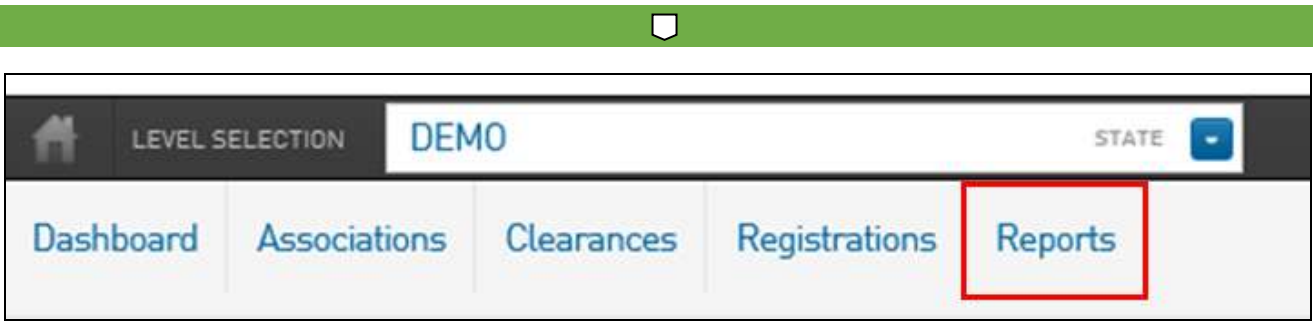
Name	Clearance Status	Approved By	Alert Date	Denial Reason	Player Financial T	Player Suspended T	Fee Applied	Additional Information	Time Updated
Club 5	Approved	matthew home			Financial	NOT Suspended	-		20/05/2015
DEMO Association 2	Approved	Mat					-		21/05/2015
DEMO	Approved	mall			Financial	NOT Suspended	-		21/05/2015
DEMO Association 1	Pending						-		
Club 1	Pending						-		



- Dashboard
- Associations
- Clearances
- Registrations**
 - Payment Configuration
 - Products
 - Registration Forms
 - Payment Splits
- Reports

12 **Registrations** will be covered in a separate section at a later date, dedicated to setting-up **Products**, **Registration Forms** and Online Payments.





- 13 Reports will be covered in a separate section at a later date, dedicated to all aspects of reporting available to mine data from the Membership Database.





Association Level Menus

LEVEL SELECTION DEMO Association 1 ASSOCIATION

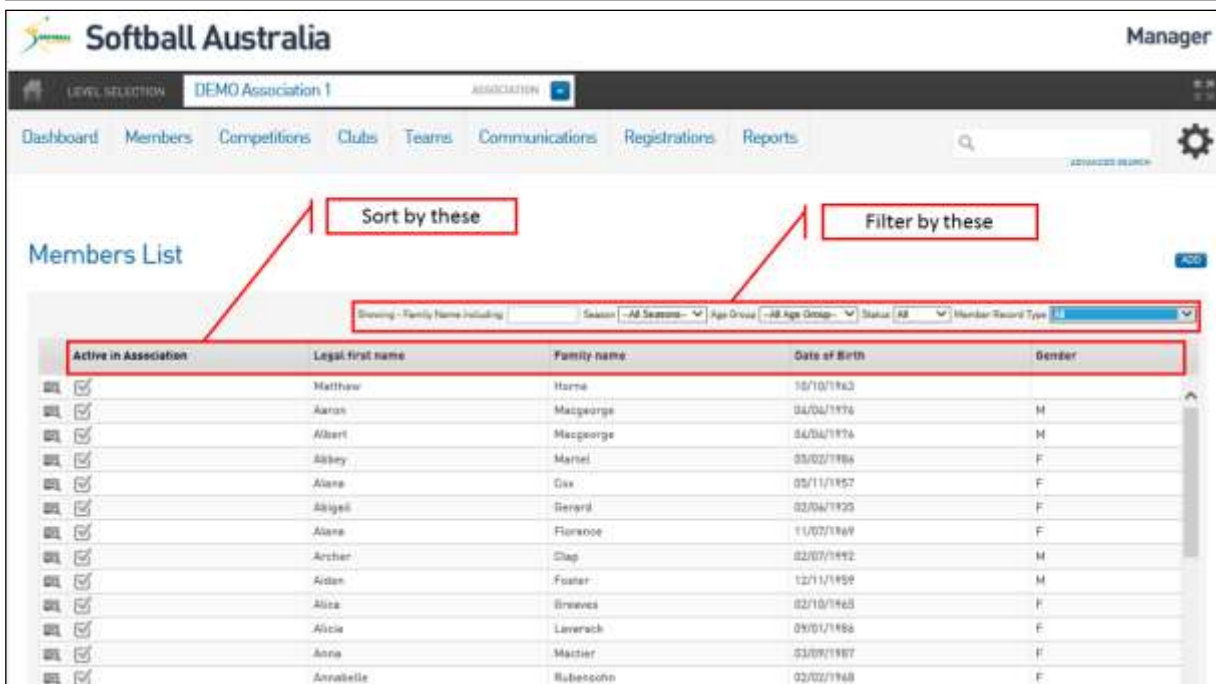
Dashboard	Members	Competitions	Clubs	Teams	Communications	Registrations	Reports
-----------	---------	--------------	-------	-------	----------------	---------------	---------

14 Functionality is identical as for state level.

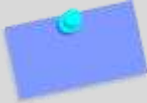


List Members


- 15 **List Members** allows you to quickly view by filtering lists of members at your reporting level.
- 16 Click on [List Members](#).



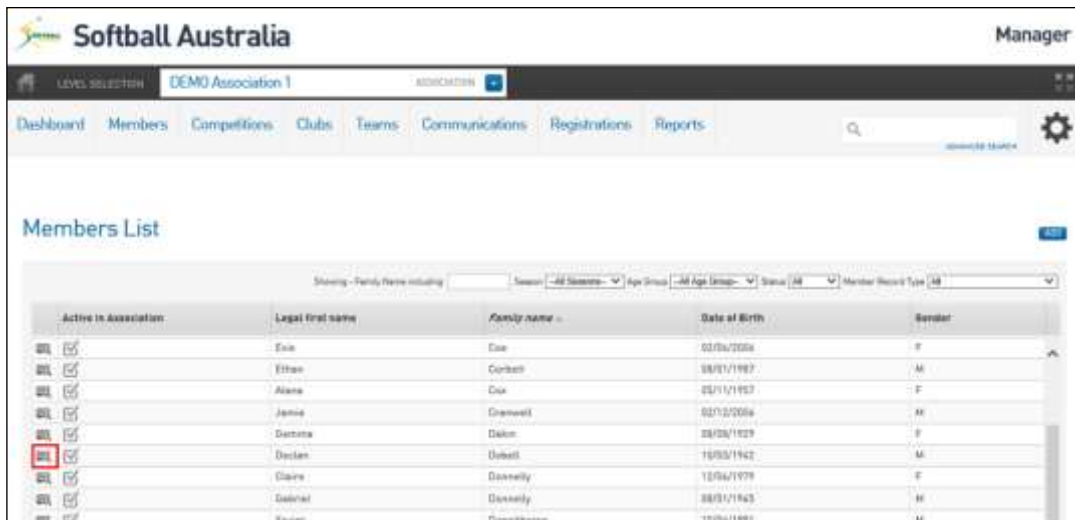
- 17 You can *filter* the list by either:
- Typing in a family name in the first box....returning every member with that name
 - Selecting the season you wish to see, eg Season 2014/15, or Season 2015.
 - Selecting an Age Group – as defined earlier on in the training Module 1B.
 - Selecting the members' status – either Active or Inactive.
 - Selecting a specific Member Type.
 - A combination of the above.
- 18 You can *sort* by selecting any one of the headings on the data columns, ie if you wish to sort by Family Name, click on **Family name** and the list will sort alphabetically from A to Z.

 **NOTE:** On the right hand side of the page is an **ADD** button. This button allows a registrar to enter a new member at this level. **DO NOT USE THIS BUTTON** to enter a new member.

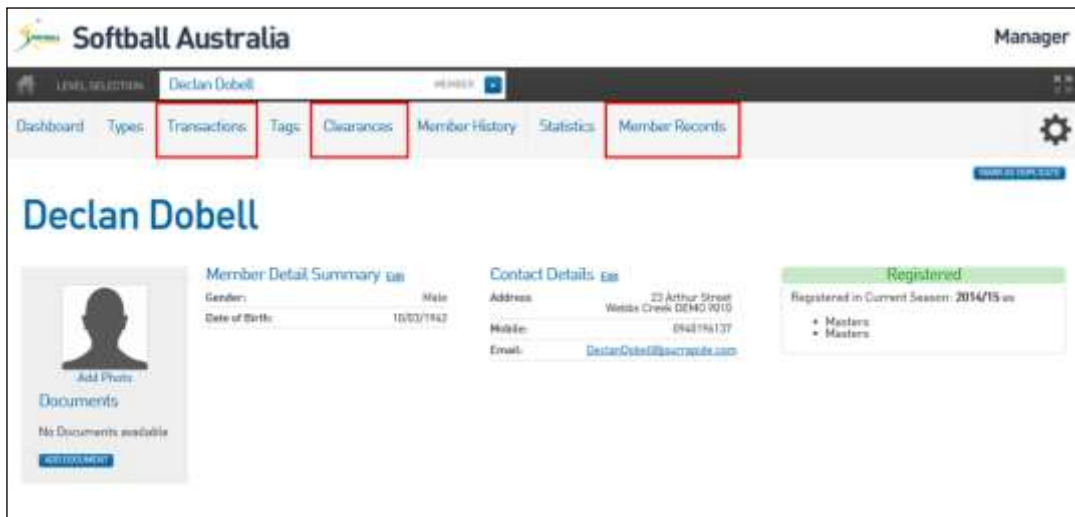
This feature does not include all the mandatory fields as shown in the registration forms. If you need to enter a new person, go to the registration form and add the new member there.



19 To look at an individual member, click on the magnifying glass icon to the left of the member name.



20 In this case, you will see that Declan Dobell from Demo Association 1 has been selected.



21 There are 3 areas that are important on this screen:

Member Records

Member Records allow you to see a summary of the history of the member at all levels of the hierarchy.

22 Click on **Member Records**.

LEVEL SELECTION Declan Dobell MEMBER

Dashboard Types Transactions Tags Clearances Member History Statistics Member Records

Member Records Summary

Club Summary

Entity	Season	Type	Age Group	Active Date	Inactive Date	Financial	Rego Form ID	Active
Club 1	2014/15	Masters	Senior	28/04/2015			49412	<input checked="" type="checkbox"/>
Club 5	2014/15	Masters	Senior	30/04/2015				<input checked="" type="checkbox"/>

Association Summary

Entity	Season	Type	Age Group	Active Date	Inactive Date	Financial	Rego Form ID	Active
DEMO Association 2	2014/15	Masters	Senior	30/04/2015				<input checked="" type="checkbox"/>
DEMO Association 1	2014/15	Masters	Senior	28/04/2015			49412	<input checked="" type="checkbox"/>

State Summary

Entity	Season	Type	Age Group	Active Date	Inactive Date	Financial	Rego Form ID	Active
DEMO	2014/15	Masters	Senior	28/04/2015			49412	<input checked="" type="checkbox"/>
DEMO	2014/15	Masters	Senior	30/04/2015				<input checked="" type="checkbox"/>

Module Summary

Entity	Season	Type	Age Group	Active Date	Inactive Date	Financial	Rego Form ID	Active
Competitions	2014/15	Masters	Senior	28/04/2015			49412	<input checked="" type="checkbox"/>
Competitions	2014/15	Masters	Senior	30/04/2015				<input checked="" type="checkbox"/>

National Body Summary

Entity	Season	Type	Age Group	Active Date	Inactive Date	Financial	Rego Form ID	Active
Softball Australia	2014/15	Masters	Senior	30/04/2015				<input checked="" type="checkbox"/>
Softball Australia	2014/15	Masters	Senior	28/04/2015			49412	<input checked="" type="checkbox"/>

All Summary

Level	Entity	Season	Type	Age Group	Active Date	Inactive Date	Financial	Rego Form ID	Active
Club	Club 1	2014/15	Masters	Senior	28/04/2015			49412	<input checked="" type="checkbox"/>
Club	Club 5	2014/15	Masters	Senior	30/04/2015				<input checked="" type="checkbox"/>
Association	DEMO Associatio...	2014/15	Masters	Senior	30/04/2015				<input checked="" type="checkbox"/>
Association	DEMO Associatio...	2014/15	Masters	Senior	28/04/2015			49412	<input checked="" type="checkbox"/>
State	DEMO	2014/15	Masters	Senior	28/04/2015			49412	<input checked="" type="checkbox"/>
State	DEMO	2014/15	Masters	Senior	30/04/2015				<input checked="" type="checkbox"/>

NEW SEASON RECORD

- 2 records in the same Season same Age Group and Member Type
 - 2 different clubs and associations
 - Conclusion – must have a permit or clearance

- 23 In this example, Declan has 2 records showing exactly the same information, except for the associations and clubs.
- 24 The only conclusion from this is that he must have a Permit or Clearance to another club.
- 25 In your first season, the majority of people should show one line per level....assuming that they play the season for one club and no others. As we venture into the second and third years you will begin to see the member's history
- 26 There is the option to create a NEW SEASON RECORD. This should **NOT** be used to create a new record from this page. For exactly the same reasons stated above about entering a new member in the member list.





Permits and Clearances

- 27 This section allows you to see Permit and Clearance details for individual members.
- 28 Click on [Clearances](#) and go into [Clearance History](#).
- 29 We can then view the details by clicking on the magnifying glass icon on the left hand side of the C

Manager

LEVEL SELECTION Declan Dobell MEMBER

Dashboard
Types
Transactions
Tags
Clearances
Member History
Statistics
Member Records

Clearance History

Ref. No.	Date	From League (Club)	To League (Club)	Status	Type
<input type="checkbox"/> 1125167	30/04/2015	DEMO Association 1 (Club 1)	DEMO Association 2 (Club 5)	Approved	Current Permit

Clearance Summary

To modify this information change the information in the boxes below and when you have finished press the 'Update Clearance' button.
Note: All boxes marked with a ● are compulsory and must be filled in.

Details

Clearance Ref. No.:	1125167
Application Date:	30/04/2015
Member being Cleared:	Dobell Declan
Date of birth:	10/03/1942
Address Suburb:	Webbs Creek
Address State:	DEMO
From Club:	Club 1
From Association:	DEMO Association 1
To Club:	Club 5
To Association:	DEMO Association 2
Permit Type:	2. Local Interchange
Permit Date From:	30/04/2015
Permit Date to:	<input type="text" value="30/09/2015"/>
Clear as Player Active ?:	Yes
Clear as Coach Active ?:	No
Clear as Match Official Active ?:	No
Clear as Misc Active ?:	No
Clear as Volunteer Active ?:	No
Overall Clearance Status:	Approved
Total Fees Applied:	\$0.00
Total Development Fees Applied:	\$0.00
Clearance Priority:	Normal
Reason for Clearance:	
Reason for Clearance:	playing with son
Additional information:	<input type="text" value="playing a season of sundays with his son"/>

Update Clearance

Clearance Approval Details

Name	Clearance Status	Approved By	Alert Date	Denial Reason	Player Financial ?	Player Suspended ?	Fee Applied	Additional Information	Time Updated
Club 1	Approved	Matthew Horne			Financial	NOT Suspended	-		30/04/2015
DEMO Association 1	Approved	Matthew Horne			Financial	NOT Suspended	-		30/04/2015
DEMO	Approved	matthew horne			Financial	NOT Suspended	-		30/04/2015
DEMO Association 2	Approved	matthew horne			Financial	NOT Suspended	-		30/04/2015
Club 5	Approved	matthew horne			Financial	NOT Suspended	-		30/04/2015



Transactions

- 30 If you use online payments, the system will track the payment for you. However, if you are manually collecting monies from your members, then it is **Transactions** where you can capture the payment details, and this will also create a receipt upon completion.
- 31 For each person that you need to complete a transaction for, click on **Transaction** to see the following.

Softball Australia Manager

LEVEL SELECTION: Anna Mactier MEMBER

Dashboard Types Transactions Tags Clearances Member History Statistics Member Records

Transactions

Filter by: All

Invoice No.	Item Name	Quantit.	Assoc Name	Amount	Start	End	Status	Pay	Notes	View Receipt
6371279	Membership Fees	1	DEMO Association 1	100.00			Unpaid	<input type="checkbox"/>		

[List All Payment Records](#)

- 32 Click on the **Pay** square and the screen below will appear.

Manual Payment

Amount (ddd.cc):

Date Paid: dd/mm/yyyy

Payment Type: ▼

Bank:

BSB:

Account Name:

Account Number:

Response Code:

Response Text:

Receipt Reference:

Comments:

- Bank Cheque
- Bank Transfer
- Cash
- Eftpos - Bankcard
- Eftpos - Mastercard
- Eftpos - Savings
- Eftpos - Visa
- International Cheque
- Money Order
- Other / Barter
- Personal Cheque
- [none]

- 33 Complete all the details, including selecting a payment type, from the pulldown list, then click on **Submit Manual Payment**.

NOTE: There is no facility in this system to allow you to set up a payment plan. You will need to manually track the payments as they come in.



34 You will see two buttons appear at the bottom left. Click on **Confirm Payment**.



35 You will receive a message confirming your payment, and two options: the first to **Print Receipt**, and the second to **Return to Transactions**.

36 When you go back to **Transactions** you will now see that the record **Status** has changed from **Unpaid** to **Paid**, and you now have the option to **View Payment Record** and **View Receipt**.

Softball Australia Manager

LEVEL SELECTION: Anna Mactier MEMBER

Dashboard Types Transactions Tags Clearances Member History Statistics Member Records

Transactions

Filter By: All

Invoice Nu.	Item Name	Quantit.	Assoc Name	Amount	Start	End	Status	Pay	Notes	View Receipt
6371279	Membership Fees	1	DEMO Association 1	100.00	14/05/2015		Paid	View Payment Rec--		View Receipt

List All Payment Records

37 As this is a manual payment, you will need to go back to **Member Records** and click on the magnifying glass icon at club level to make this member 'financial'.

Softball Australia Manager

LEVEL SELECTION: Anna Mactier MEMBER

Dashboard Types Transactions Tags Clearances Member History Statistics Member Records

Member Records Summary

NEW SEARCH RECORD

Club Summary

Entry	Season	Type	Age Group	Active Date	Inactive Date	Financial	Rego Form ID	Active
Club 2	2014/15	Fastpitch	Senior	28/04/2015			49612	<input checked="" type="checkbox"/>

Association Summary

Entry	Season	Active Date	Inactive Date	Financial	Rego Form ID	Active
DEMO Association 1	2014/15	28/04/2015			49612	<input checked="" type="checkbox"/>

State Summary

Entry	Season	Type	Age Group	Active Date	Inactive Date	Financial	Rego Form ID	Active
DEMO	2014/15						49612	<input checked="" type="checkbox"/>

Module Summary

Entry	Season	Type	Age Group	Active Date	Inactive Date	Financial	Rego Form ID	Active
Competitions	2014/15	Fastpitch	Senior	28/04/2015			49612	<input checked="" type="checkbox"/>



38 Tick **Financial**. Click **Update Record**.

The screenshot shows the 'Member Record' page in the Softball Australia Manager. At the top, the user is logged in as 'Anna Mactier' with a 'MEMBER' role. The navigation menu includes Dashboard, Types, Transactions, Tags, Clearances, Member History, Statistics, and Member Records. The main content area is titled 'Member Record' and contains a form with the following fields:

- Season: 2014/15 (dropdown menu)
- Entity Type: Club (dropdown menu)
- Entity: Club 2 (dropdown menu)
- Type: Fastpitch (dropdown menu)
- Age Group: Senior (dropdown menu)
- Active Date: 28/04/2015 (text input)
- Inactive Date: (empty text input)
- Financial: (checkbox, highlighted with a red box)
- Active: (checkbox)

At the bottom of the form is a green 'Update Record' button, also highlighted with a red box. A note above the form states: 'To modify this information change the information in the boxes below and when you have finished press the 'Update Record' button. Note: All boxes marked with a red circle are compulsory and must be filled in.'

39 You will receive a confirmation that the Record has been successfully updated.



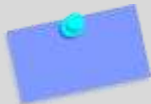


Duplicate Resolution




IMPORTANT: This should only be done by the association registrar and it is important they are absolutely sure that this is a duplicate before going ahead, as the change is permanent and cannot be undone.


- 40 Duplicate resolution is only required when you have two Records that contain the same First Name, Family Name, Date of Birth and Member Record Type. These are the four fields that define a Record.



NOTE: We have turned ON Duplicate Resolution at registration so this should not occur. If someone tries to reregister at another association or state using the same four fields, the following screen will appear.



Club 1



Registering Adult 1

✓ Choose Type
2. Basic Info
3. Extra Info
4. Summary

A member with the same name and date of birth already exists! Please contact Club 1 to request a transfer.

This text will not be able to be edited by States.

Legal first name : *

Family name : *

Date of Birth : / / *

DAY MONTH YEAR

Gender : *

Registering As :

- Fastpitch
- Tee Ball
- Casual
- Slowpitch
- Off Diamond
- Official
- Masters

* Please choose at least one member type



- 41 On the off-chance that a Duplicate Record has been created, when you first log into Membership at the association level, a notification will appear on the **Dashboard** alerting you of any possible duplicates that require your attention.

Softball Australia Manager

LEVEL SELECTION: DEMO Association 1 ASSOCIATION

Dashboard Members Competitions Clubs Teams Communications Registrations Reports

SEARCH [] ADVANCED SEARCH

DEMO Association 1

Details [Edit](#)

Address:
PO Box 123
Anniebrook
Demo, AUSTRALIA, 9101

Phone: 09 8956 2314
Email: Demoeson1@gmail.com

Contacts [Edit](#)

President (primary contact):
Alfred Smith
0400 123 456
AS@gmail.com

Treasurer:
David Smith
0400 123 789
DS@gmail.com

Vice President:
Jan Smith
0400 456 789
JS@gmail.com

Secretary:
Sandra Bates
0400 004 400
SandyB@hotmail.com

Notifications
You have 1 Notifications. [View All](#)
The following items require your attention:
● [You have 1 duplicate to resolve.](#)

- 42 You can either click on the **[You have \[x number of\] duplicate to resolve](#)** message in **Notifications**, or you can go to **Members** and select **Duplicate Resolution**.

LEVEL SELECTION DEMO Association 1 ASSOCIATION

Dashboard Members Competitions Clubs Teams Communications Registrations Reports

Duplicate Resolution

The list below is of people that have been added that match another person.

To resolve the problem you must choose one of the options beside each person and then press the 'Update Duplicates' button.

Show warnings

Update Duplicates

	Problem Record (New Record)		Suggested Match (Existing Online Data) View more details...	
Firstname	Sophia		Sophia	
Surname	Baddeley		Baddeley	
Date of Birth	08/02/1992		08/02/1992	
Date Last Updated	16/05/2015		28/04/2015	
Date Created Online	16/05/2015		28/04/2015	
Date Last Registered	16/05/2015		28/04/2015	
Address 1	94 Mainlongoon Road	= ?	94 Maintongoon Road	
Postal Code	9010		9010	
Suburb	Webbs Creek		Webbs Creek	
State	Demo		DEMO	
Country				
Association			DEMO Association 1	
Status	Active		Active	
Club	Club 1		Club 1	
Number				

Choose option

- This is the same person (Merge using new data as the base)
- This is the same person (keep existing data)
- This is a new person
- Oops, delete this person
- Ignore this person for now

- 43 The **Duplicate Resolution** screen will appear showing the possible duplicates. The member data is shown in two columns:
- 43.1 **Problem Record:** the left column is the newly created member record that has caused the duplication.
- 43.2 **Suggested Match:** the right column is the existing member record that was already in the database.
- 44 While possible duplicates are based on three matching fields (First Name, Surname and Date of Birth), other member data is also shown on this screen to help you decide which member data to use, such as Contact Details, Association, Club, Active Status and Member Number.



- 45 On the right under **Choose option** there are five options for resolving the duplicate:
- 45.1 **This is the same person (merge using new data as the base):** Select this option if the new record is the same person as the existing record and the new record contains more up-to-date contact information. This option will use all of the new member data unless a field is blank, in which case it will use the existing data. In most cases, this option is the most appropriate one to use as it updates the member's record with their new information, and still retains all of their historical data. The member record will belong to both locations (i.e. the two different clubs or associations) but the system will recognise the member as a single person.
 - 45.2 **This is the same person (keep existing data):** Select this option if the new record is the same person as the existing record and the existing record contains more up-to-date contact information. This option will retain all of the member's existing information. The member record will belong to both locations (i.e. the two different clubs or associations) but the system will recognise the member as a single person.
 - 45.3 **This is a new person:** Select this option if the new record, despite having the same first name, surname and date of birth, is in fact a different person. Note: research suggests that this should only occur around about 1 in 10,000 records, so this option will rarely be used.
 - 45.4 **Oops, delete this person:** Select this option if the new record was added by mistake and you wish to delete the new record. This will not affect the member's existing record.
 - 45.5 **Ignore this person for now:** Defer a decision on resolving the duplicate until a later time.
- 46 Select the appropriate duplicate resolution option for each possible duplicate. If the **Show Warnings** option at the top of screen is selected, when an option is selected a pop-up message will appear providing a further explanation of the option. You may wish to untick this option once you become familiar with all of the options.
- 47 Click **Update Duplicates** when completed and you will receive a **Records Updated** message.



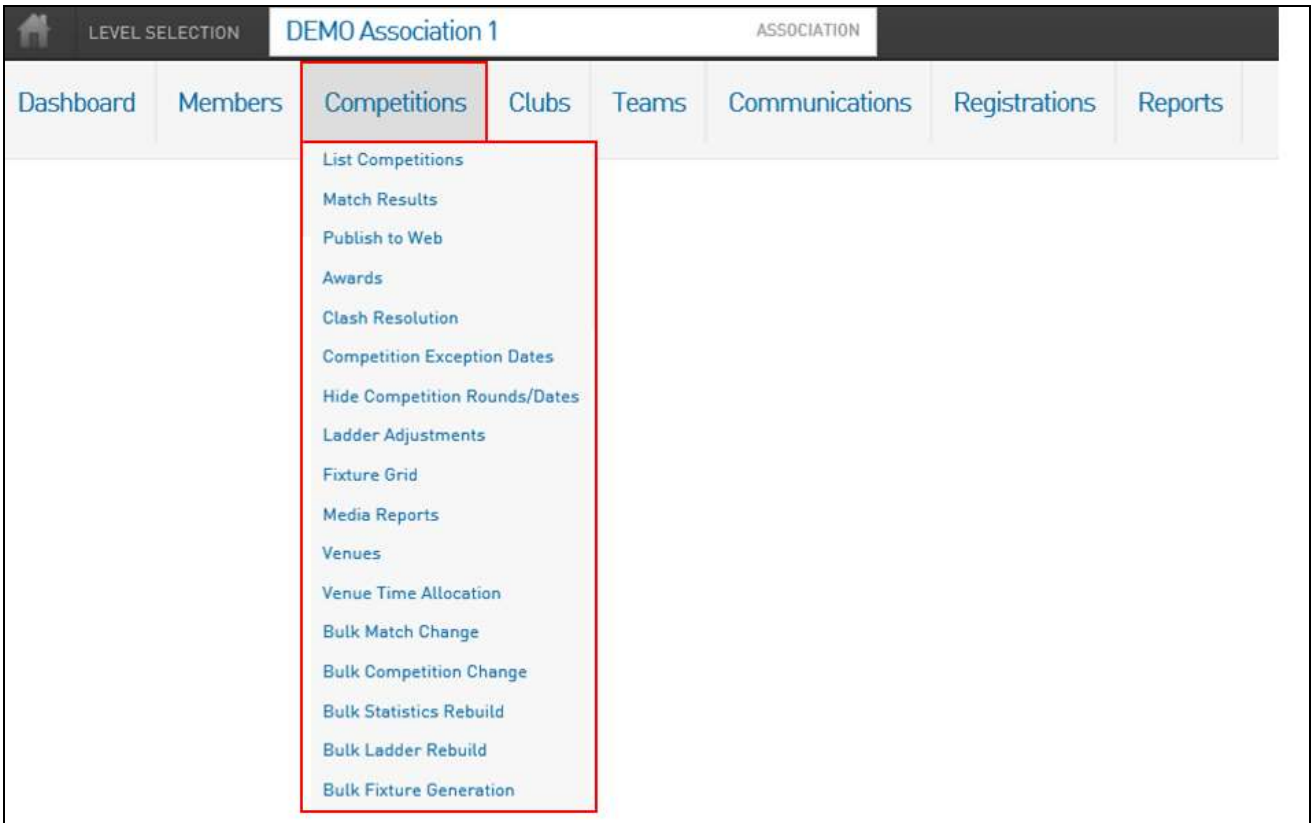


List Online Clearances

48 Functionality is identical as for state level.

Players Career Statistics

49 This option is currently not available but will be a further feature to be activated after the initial rollout of the system.



50 The **Competitions** menu will be covered in its own separate training module.



List Clubs

- 51 This will take you to a list of all clubs that reside beneath the association in the hierarchy....and works exactly the same way as the **Associations** tab does under the state level.

Club Championships

- 52 Allows you to create specific rules to determine club champions based on performance of all their teams in an overall association competition.
- 53 More details will be shown in the Competition Module.

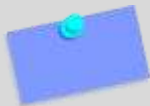


- 54 **Teams** gives you a list of all the teams in the association competitions. If you wish, you can use the **Showing - Season** filter to show all teams in that particular competition season or the **Age Group** filter to show all teams in a particular age group.



55 [Communications](#) opens a basic tool that allows you to reach out via email to your members in the database.

56 Click on [Communications > Communicator](#).



NOTE: Before you can send any emails, you need to set up your profile with your 'reply to' email address as a minimum.

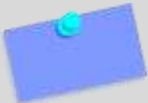


Profile

- 57 This important function allows you to manage and setup user-profile settings for this account. If you do not update the profile information ,you cannot send information out.
- 58 Click on [Profile](#) and you will see...

The screenshot shows the 'Softball Australia Manager' interface. At the top, there's a navigation bar with 'LEVEL SELECTION' set to 'DEMO Association 1' and 'ASSOCIATION' set to '1'. Below this is a menu with 'Dashboard', 'Members', 'Competitions', 'Clubs', 'Teams', 'Communications', 'Registrations', and 'Reports'. The main content area is titled 'Communicator - Profile Settings' and includes the instruction 'Set your sender and reply settings.' Under 'Email Settings', there are two input fields: 'Reply To address:' and 'Email Footer/Signature:'. A green 'Save Settings' button is located at the bottom of the form. A note below the fields states: 'This message will appear on each email sent from this account.'

- 59 Enter the **Reply To (email) address** (compulsory). The **Reply To address** is the email address that replies will be sent to.

 **NOTE:** Email messages cannot be sent successfully until a **Reply To address** has been entered.

- 60 Enter a default **Email Footer/Signature** (optional) that each new email will automatically be populated with. Setting up a default footer/signature will save you having to set it up each time you compose an email. You can change or delete the default footer/signature when composing an email.



Send a Message

61 Click on **Send a message**. There are three options:

- **Membership Group:** defines individuals in different membership groups.
- **Custom Group:** you can create customised email groups.
- **Saved Report:** you can use a saved members report to define who you wish to send emails to.

62 Click on **Membership Group**.

63 This option allows you to select which group you would like to send an email to:

- Club Contacts is based on the responsibilities listed against each contact point in the club
- Team Contact is to those people who are listed in the database as a team contact
- The rest (Players, Coaches, Umpires, Misc, Volunteers and Officials) when selected asks you to provide a purpose for the communication. When you click on any of these options you will see...

64 The Primary and Secondary purposes are define as:

Primary Purpose/Implied Consent: This communication should be contained to including only information that, if not communicated would affect the administration of the game. For instance: if the game is postponed, cancelled or forfeited, or if there is a change in time or location. These are the ONLY types of communications that can be sent to the whole database.

Secondary Purpose/Express Consent: This communication can contain information about the season (eg scores, statistics, weekly newsletters), special offers, promotions and marketing. These communications can ONLY go to those who have opted-in to receiving this information upon registration and have not opted-out prior to the last seven days.

65 When you have selected which one you want, click **Continue**. A list of recipients will appear.



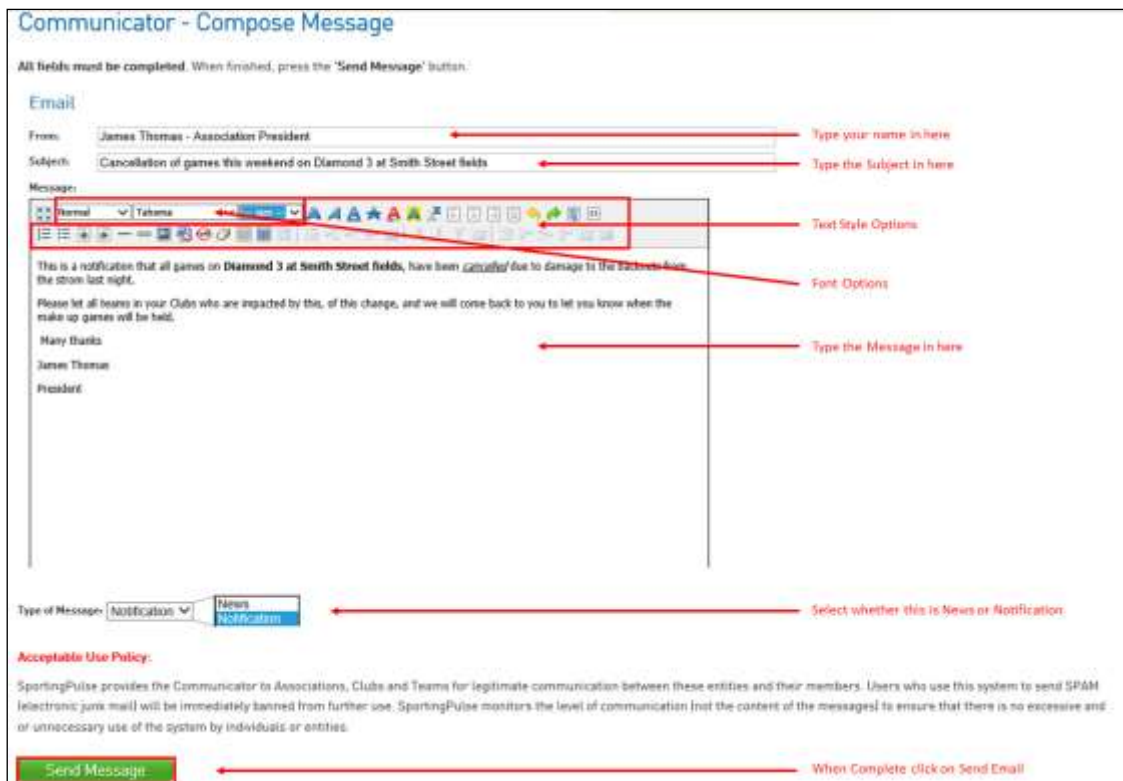
Email Send an email message to contacts with an email address.

Contacts List		
Name	Email	Mobile
Marcel Marceau	silence@mime.com	0400 000 000
Chew Backa	furry@space.com.au	0409 999 999
Bob Simpson	BobSim@cricket.com.au	0400 100 200
Lisa Simpson	smart@IBM.com	0410001110
Moe Bartender	Moe@bar.com	0499 963 258
Martina Dodd	Ddodd@gmail.com	0400960630
Ray Smith	ray.smith@hotmail.com	
Charlotte Webb	secClub3@gmail.com	0413313515

Contact Summary

Contacts with an Email address	8
Total Contacts	8

66 If you are happy with the list, click **Email**.



Communicator - Compose Message

All fields must be completed. When finished, press the 'Send Message' button.

Email

From: James Thomas - Association President → Type your name in here

Subject: Cancellation of games this weekend on Diamond 3 at Smith Street fields → Type the Subject in here

Message:

→ Text Style Options

→ Font Options

→ Type the Message in here

Type of Message: Notification News Notification → Select whether this is News or Notification.

Acceptable Use Policy:

SparringPulse provides the Communicator to Associations, Clubs and Teams for legitimate communication between these entities and their members. Users who use this system to send SPAM (electronic junk mail) will be immediately banned from further use. SparringPulse monitors the level of communication (not the content of the messages) to ensure that there is no excessive and/or unnecessary use of the system by individuals or entities.

Send Message → When Complete click on Send Email



- 67 **Custom Group** allows you to send emails to specific groups of people you have set up.
- 68 Click **Custom Group** and you will see...

Custom Group

Choose which Custom Group you want to send to. When complete press the "Continue" button.

Groups:

Fastpitch Members
U12s

Continue

Select from the pulldown list which Custom Group you wish to use.

- 69 Select the Custom Group you wish to use and click **Continue**.

Communicator - Confirm Recipients

You have chosen to send a message to Custom Group "Fastpitch Members".

Email Send an email message to contacts with an email address.

Contacts List		
Name	Email	Mobile
Alana Cox	AlanaCox@superrito.com	0994755572
Archer Clap	ArcherClapp@einrot.com	0953837580
Kaitlyn Haenke	KaitlynHaenke@gustr.com	(09) 5385 8255
Declan Dobell	DeclanDobell@jourrapide.com	0940196137
Angus Burne	AngusBurne@armyspy.com	(09) 6127 5699
Kaitlyn Goldie	KaitlynGoldie@rhyta.com	0953263635
Stephen Baddeley	StephenBaddeley@superrito.com	0953001356
Helen Hake	RachelHake@einrot.com	(09) 8330 1961

Contact Summary

Contacts with an Email address	8
Total Contacts	8

- 70 If you are happy with the list, click **Email** and follow the same process as outlined above in **Membership Group**.



- 71 **Saved Reports** allows you to email to a group of people as defined in a report you have specifically designed for this purpose (see Module 1E – Reporting).
- 72 Click on **Saved Reports** and you will see.....

Saved Report

Choose which saved report output you want to send to. When complete press the "Continue" button.

Reports:

ReplaceText-Members : Full list of Members in Association Include parents

Continue

- 73 Select the **Saved Report** you would like to send the email to, and if you have children in this list you have the option to also send the email to their parents by selecting the **Include Parents** checkbox.
- 74 Click **Continue**.

You have chosen to send a message to Saved Report "Full list of Members in Association".

Email Send an email message to contacts with an email address.

Contacts List		
Name	Email	Mobile
Albert Macgeorge	albertmacgeorte@armyspy.com	0949064626
Abbey Martel	abbeymartel@superrito.com	0949288854
Alana Florance	AlanaFlorance@fleckens.hu	0982905639
Archer Clap	ArcherClapp@einrot.com	0953837580
Alicia Lavarack	AliciaLavarack@fleckens.hu	(09) 9202 7944
Anna Mactier	AnnaMactier@armyspy.com	(09) 5310 6368
Ashton Ingamells	AshtonIngamells@teleworm.us	(09) 5361 3062
Charlotte Tritton	CharlotteTritton@fleckens.hu	(09) 5365 3297
Declan Laidley	DeclanLaidley@gustr.com	(09) 4037 4403
Ebony Falkiner	EbonyFalkiner@fleckens.hu	(09) 8242 6685
Ellie Nicoll	EllieNicoll@cuvox.de	(09) 9087 6603
Erin Farrow	ErinFarrow@dayrep.com	(09) 4065 9597
Grace Hinton	GraceHinton@superrito.com	(09) 8295 8021
Hayley Windich	HayleyWindich@dayrep.com	(09) 4515 6947
Joel Ampt	JoelAmpt@dayrep.com	(09) 9324 2365
Kaithlyn Haenke	KaitlynHaenke@gustr.com	(09) 5385 8255
Liam Cazneau	LiamCazneau@fleckens.hu	(09) 6235 3339

- 75 If you are happy with list, click **Email**, and follow the same process as outlined above in **Membership Group**.



Team Renewals and Member Renewals

76 Team Renewals and Member Renewals allow you to send messages to teams and individual members who are currently in a competition, reminding them to reregister for the upcoming season.

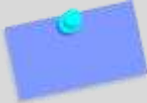
(No Screen shots for this at this point in time)

77 Select the last season from the list for teams or members for renewal to the new season.

78 Select the competitions that the teams or individual members were involved in.

79 Click **Choose Form** and select which registration form you wish to use.

80 Click **Customise Email** and type in the message you would like to email to the teams or individual members.



NOTE: Families who use a multi member discount should not use the process that this email offers as it is for one off members/teams. Families using multi member discounts should go to the normal form and fill it out. You can add the link to the form (with explanatory information) to the email details above.

81 Send the email – but only when you are ready to accept member renewals.

Manage Custom Groups

82 Click **Manage Custom Groups** and you see a list of all the **Custom Groups** you have created.

Communicator Groups in Association

Set up custom groups of members and contacts from your database.

To add members to a group, click on the view button next to the group name

To edit member details, this must be done via the [Member List](#).

Name
 Fastpitch Members
 U12s

83 To add a new Group, click on **Add** at the top right of the page.

Add a Custom Group

Group Name:

84 Type in the **Group Name** and click **Update Group**.




85 Edit the group by clicking on the magnifying glass icon to the left of the **Group Name** you wish to edit.

Communicator Groups in Association

Set up custom groups of members and contacts from your database.

To add members to a group, click on the view button next to the group name

To edit member details, this must be done via the [Member List](#).

Name	
	Fastpitch Members
	Officials
	U12s

86 You can rename, modify members or delete the group.

87 If you click on [Modify Members](#) you will see a full list of your member that you can click on and drag across to a [Selected Members](#) box on the right.

Communicator - Edit Group

Move Members into and out of the group by dragging the Member to the right box. When finished, press the 'Update' button.

Available Members

- George, Dakota
- Gerard, Abigail
- Gerrald, Rebecca
- Glynn, Madeleine
- Goldie, Kaitlyn
- Graham, Charlie
- Hake, Amanda
- Hake, Helen
- Hake, Julian
- Hake, Rachel
- Hawker, Rose
- Heath, George
- Heath, Molly
- Hely, Daniel
- Hinton, Grace
- Holden, Koby
- Horne, Matthew

Selected Members

1. Angus, Gabriel
2. Burne, Angus
3. Eggleston, Layla
4. Florance, Alana
5. Haenke, Kaithlyn

Greaves, Alice

[Update](#)

88 When you have finished, click [Update](#) and your new group is now ready to use.



Send Messages

- 89 This option takes you to the list of emails you have sent.
- 90 You can see the date, type, subject, and number of recipients of the email; and you can open the email by clicking **Email** in the **Message** field.

Date/Time	Type	Subject	Message	Num. Recipients
23/05/2015 23:33	Email	Test of the communicator system	Email	2



LEVEL SELECTION	DEMO Association 1	ASSOCIATION
Dashboard	Members	Competitions
Clubs	Teams	Communications
Registrations	Reports	
Products		
Registration Forms		

- 91 The **Registrations** menu will be covered in a future training module.





92 The **Reports** menu will be covered in a future training module.



Club Level Menus



93 Functionality is identical as for state level.





NOTE:

- List Members
- Request a Clearance/Permit
- List Online Clearances

The same as found in the Association Members Menu

The same as found in the Association Members Menu

Request a Clearance/Permit`

- 94 The hierarchy structure in the Database requires Clearances and Permits be handled at club level.
- 95 The process is a 'pull' process, meaning the club that the player wishes to have a Clearance or a Permit to, starts the process. This club is known as the Destination Club.
- 96 In order for this to happen, the registrar at the Destination Club needs to know the club and association the player is coming from (**Source Club** and **Source Association**). Once they have this detail the process is very simple.
- 97 For this example, *Tayah Stokes* from Club 4 – DEMO Association 2 wishes to get a permit to play in Club 1 – DEMO Association 1.
 - Source Club is Club 4 and Source Association is DEMO Association 2
 - Destination Club is Club 1 and Destination Association is DEMO Association 1
- 98 Registrar at Destination Club (Club 1) clicks on **Member** tab and selects **Request a Clearance/Permit**.



Request a Clearance/Permit

Please fill in the appropriate information below to Request a Clearance/Permit

Select the Source Module from which the required member is from:

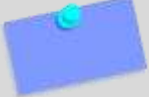
Module Body:

OR

Search on National Number:



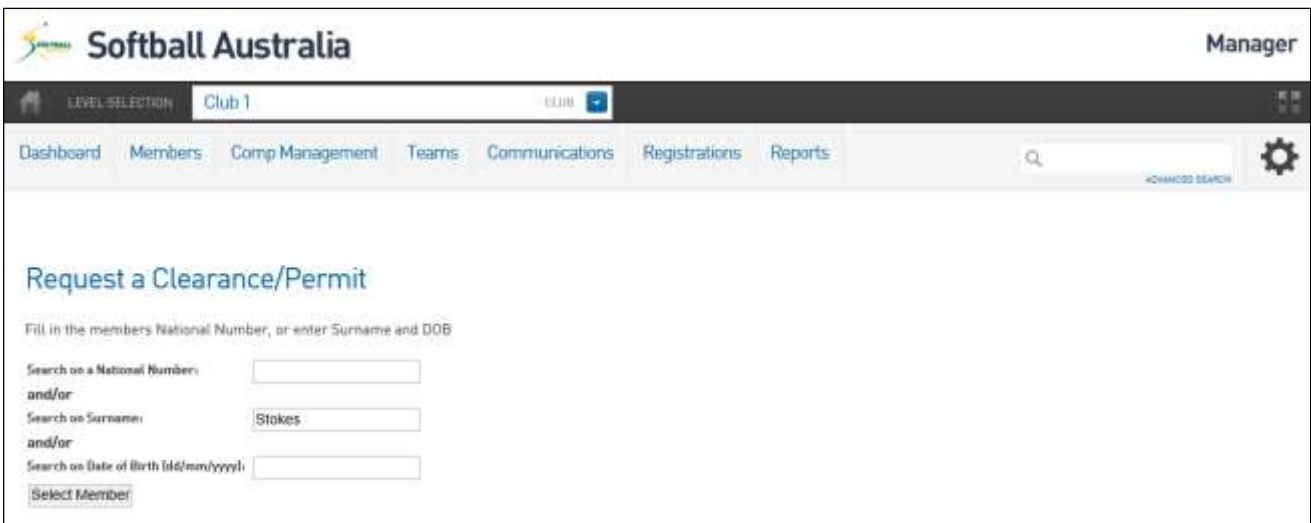
- 99 From the **Select a Source Module**, select **Competitions** and click on **Select**.
- 100 Select the **Source Association** from the pulldown list.

 **NOTE:** This list is all the Associations in Australia listed alphabetically.

- 101 Click **Select Association**.
- 102 Select the **Source Club** from the pulldown list.

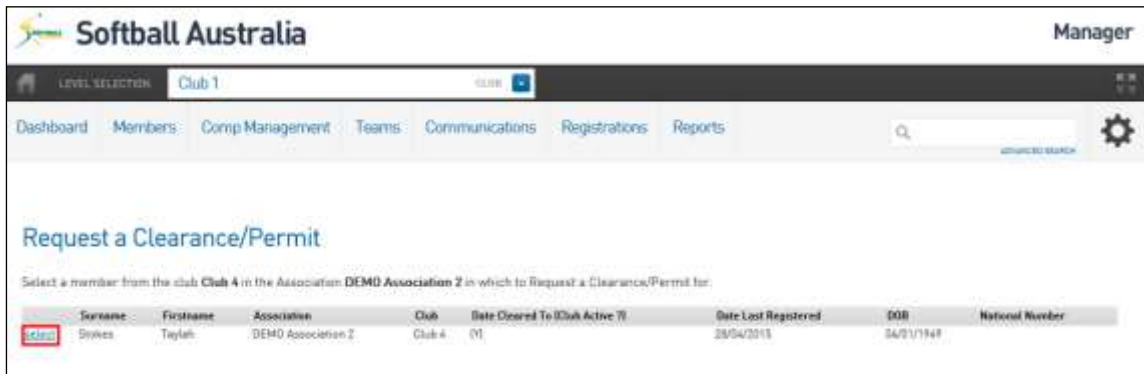


- 103 Click **Select Club**.
- 104 Search for the member by one of three methods:
 - By their National Number
 - Surname
 - Date of Birth



- 105 Click **Select Member**.

- a) Click [Select](#) to the left of the member for whom you wish to enter a Permit or Clearance.



Softball Australia Manager

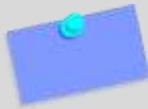
LEVEL SELECTION: Club 1

Dashboard Members Comp Management Teams Communications Registrations Reports

Request a Clearance/Permit

Select a member from the club **Club 4** in the Association: **DEMO Association 2** in which to Request a Clearance/Permit for:

Select	Surname	Firstname	Association	Club	Date Cleared To (Club Active ?)	Date Last Registered	DOB	National Number
<input type="checkbox"/>	Stokes	Taylah	DEMO Association 2	Club 4	(N)	28/04/2013	04/01/1994	

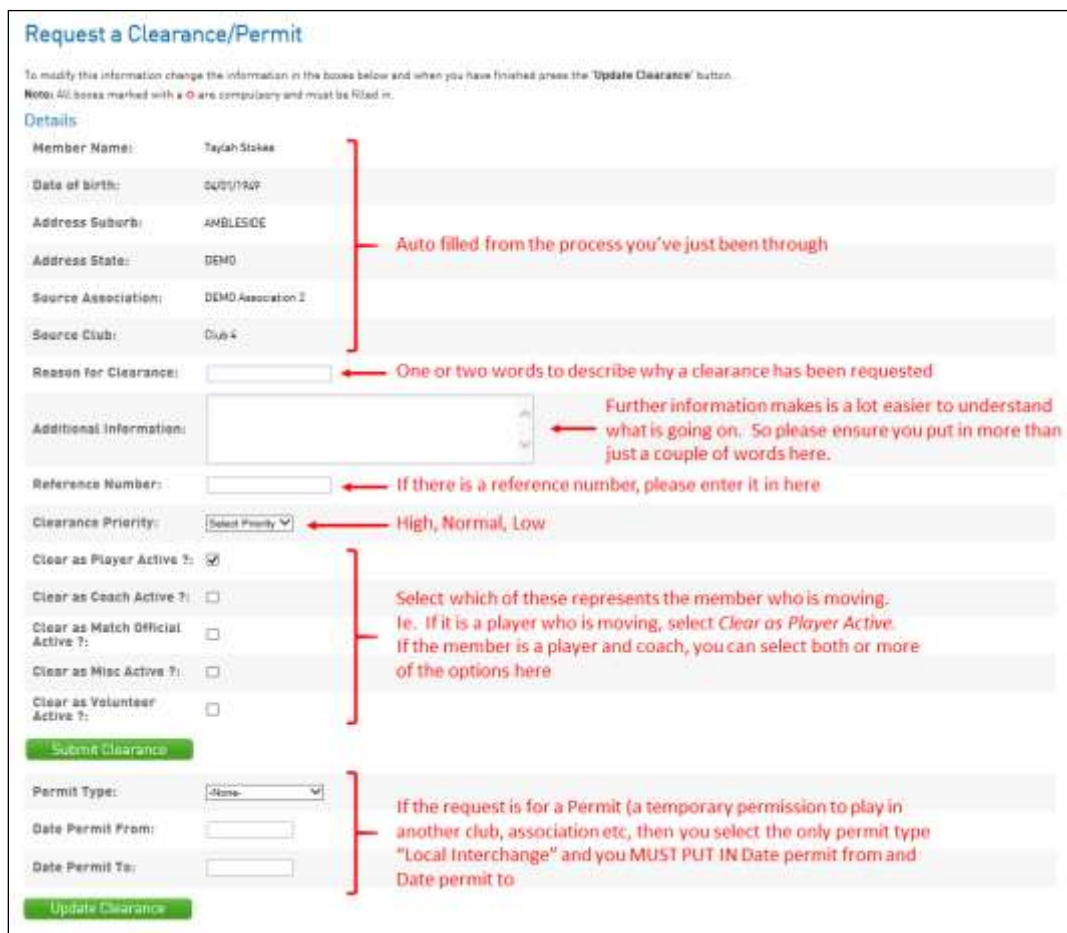


NOTE: A Permit is used when a member wishes to participate for a short defined period of time in another competition with another club, association or even state. This could be for a weekend tournament, another level of competition in another club during the same season that they are participating in their normal game.

A Permit allows the member to still participate in their 'home' club and comp.

A Clearance is a permanent move from one club to another. Once a Clearance is approved at all levels, that member is no longer able to participate in their old 'home' club season.

- 106 Complete the form with as much information as possible.



Request a Clearance/Permit

To modify this information change the information in the boxes below and when you have finished press the 'Update Clearance' button.
 Note: All boxes marked with * are compulsory and must be filled in.

Details

Member Name: Taylah Stokes
 Date of birth: 04/01/1994
 Address Suburb: AMBLESIDE
 Address State: DEMO
 Source Association: DEMO Association 2
 Source Club: Club 4

Reason for Clearance: *One or two words to describe why a clearance has been requested*

Additional Information: *Further information makes is a lot easier to understand what is going on. So please ensure you put in more than just a couple of words here.*

Reference Number: *If there is a reference number, please enter it in here*

Clearance Priority: *High, Normal, Low*

Clear as Player Active?:
 Clear as Coach Active?:
 Clear as Match Official Active?:
 Clear as Misc Active?:
 Clear as Volunteer Active?:

Select which of these represents the member who is moving. i.e. If it is a player who is moving, select Clear as Player Active. If the member is a player and coach, you can select both or more of the options here

Submit Clearance

Permit Type:
 Date Permit From:
 Date Permit To:


If the request is for a Permit (a temporary permission to play in another club, association etc, then you select the only permit type "Local Interchange" and you MUST PUT IN Date permit from and Date permit to

Update Clearance



107 When complete, click **Submit Clearance** if you are submitting a Clearance, or **Update Clearance** for a Permit.

Request a Clearance/Permit

To modify this information change the information in the boxes below and when you have finished press the 'Update Clearance' button.
Note: All boxes marked with a  are compulsory and must be filled in.

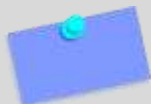
Details

Member Name:	Taylah Stokes
Date of birth:	04/01/1949
Address Suburb:	AMBLESIDE
Address State:	DEMO
Source Association:	DEMO Association 2
Source Club:	Club 4
Reason for Clearance:	<input type="text"/>
Additional Information:	<div style="border: 1px solid gray; padding: 2px;">Taylah would like to play on Sunday with her daughter in Association 1's competition. She will be continuing to play on Saturday's in her regular comp.</div>
Reference Number:	<input type="text"/>
Clearance Priority:	Normal <input type="button" value="v"/>
Clear as Player Active ?:	<input checked="" type="checkbox"/>
Clear as Coach Active ?:	<input type="checkbox"/>
Clear as Match Official Active ?:	<input type="checkbox"/>
Clear as Misc Active ?:	<input type="checkbox"/>
Clear as Volunteer Active ?:	<input type="checkbox"/>
<input type="button" value="Submit Clearance"/>	
Permit Type:	2. Local Interchange <input type="button" value="v"/>
Date Permit From:	<input type="text" value="10/05/2015"/>
Date Permit To:	<input type="text" value="05/09/2015"/>
<input type="button" value="Update Clearance"/>	

Click on Submit Clearance if you are submitting a Clearance

Click on Update Clearance if you are submitting a Permit

...and you will see a screen that indicates the record has been updated successfully.



NOTE: The approval process follows the logical workflow. For this example, Source Club, Source Association, State, Destination Association and then Destination Club.



Approving Permit and Clearance requests

108 With this example when we look at Club 1 (Destination Club) Members Tab, List of Clearances, we can see Taylah Stokes' Permit is sitting there with an overall Status of **Pending** and at Club 1's level is it **Not Yet for your Approval**.

The screenshot shows the 'List of Clearances' page in the Manager interface. The status 'Pending' is highlighted in a red box in the filter dropdown. In the table below, the status 'Not yet for your approval' and the overall status 'Pending' are also highlighted with red boxes.

Name	Date of Birth	From Assoc.	From Club	To Assoc.	To Club	This level's status	Overall stat.	Application D.	Created By	Ref. No.	Alert Date	Year
Stokes, Taylah	04/01/1949	DEMO Assoc...	Club 4	DEMO Assoc...	Club 1	Not yet for your approval	Pending	16/05/2015	Divina Clear...	1138798		2014

109 And if we open this up by clicking on the magnifying glass icon to the left of the record...

The screenshot shows the 'Clearance Summary' page. A red bracket highlights the 'Details' section, and a red arrow points to the 'Approval Details' table.

Details

Clearance Ref. No.: 1138798
 Application Date: 16/05/2015
 Member being Cleared: Stokes Taylah
 Date of birth: 04/01/1949
 Address Suburb: AMBLESIDE
 Address State: DEMO
 From Club: Club 4
 From Association: DEMO Association 2
 To Club: Club 1
 To Association: DEMO Association 1
 Permit Type: 2 Local Interchange
 Permit Date From: 10/05/2015
 Permit Date to: 05/09/2015
 Clear as Player Active?: Yes
 Clear as Coach Active?: No
 Clear as Match Official Active?: No
 Clear as Misc Active?: No
 Clear as Volunteer Active?: No
 Overall Clearance Status: **Pending**
 Total Fees Applied: \$0
 Clearance Priority: Normal
 Reason for Clearance:
 Additional Information: Taylah would like to play on Sunday with her daughter in Association 1's competition. She will be continuing to play on Saturday's in her regular comp.

Approval Details

Name	Clearance Status	Approved By	Alert Date	Denial Reason	Player Financial?	Player Suspended?	Fee Applied	Additional Information	Time Updated
Club 4	Pending								
DEMO Association 2	Pending								
DEMO	Pending								
DEMO Association 1	Pending								
Club 1	Pending								

We can see all the details that we put into the Permit request

And we can also see that there has been no activity with regards approving the request. This works from top down...so Club 4 has to provide approval first. Then the rest in order.



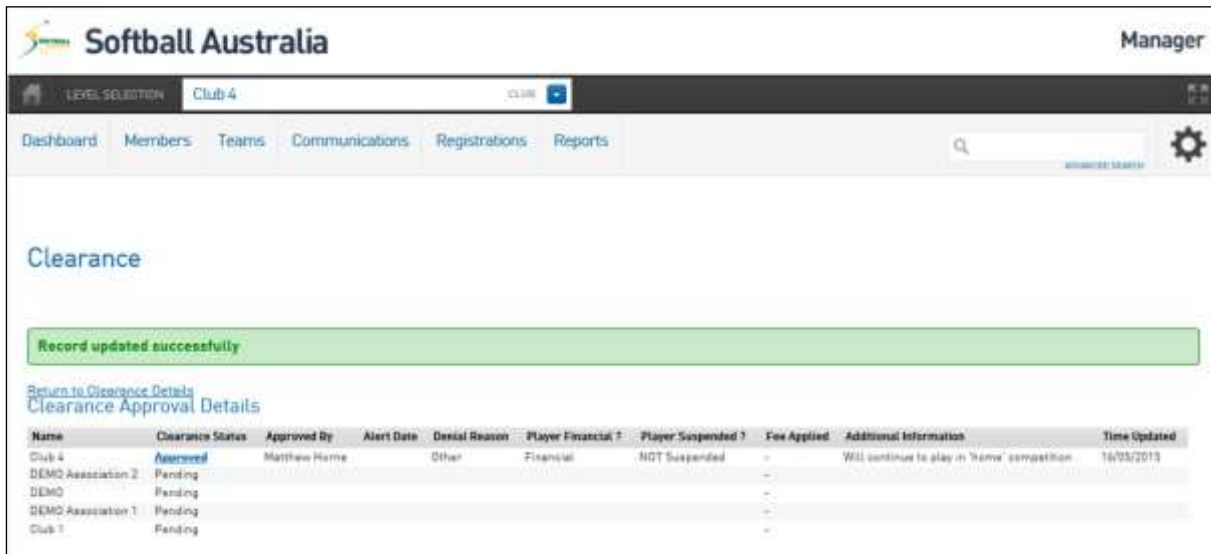
110 If we complete the same process with Club 4 ,we see a different outcome.

111 We can see that the **Overall status** is still **Pending**, but we now have Level's **Status** showing **---AWAITING YOUR APPROVAL---**.

112 To approve this Permit we must click **---AWAITING YOUR APPROVAL---**.



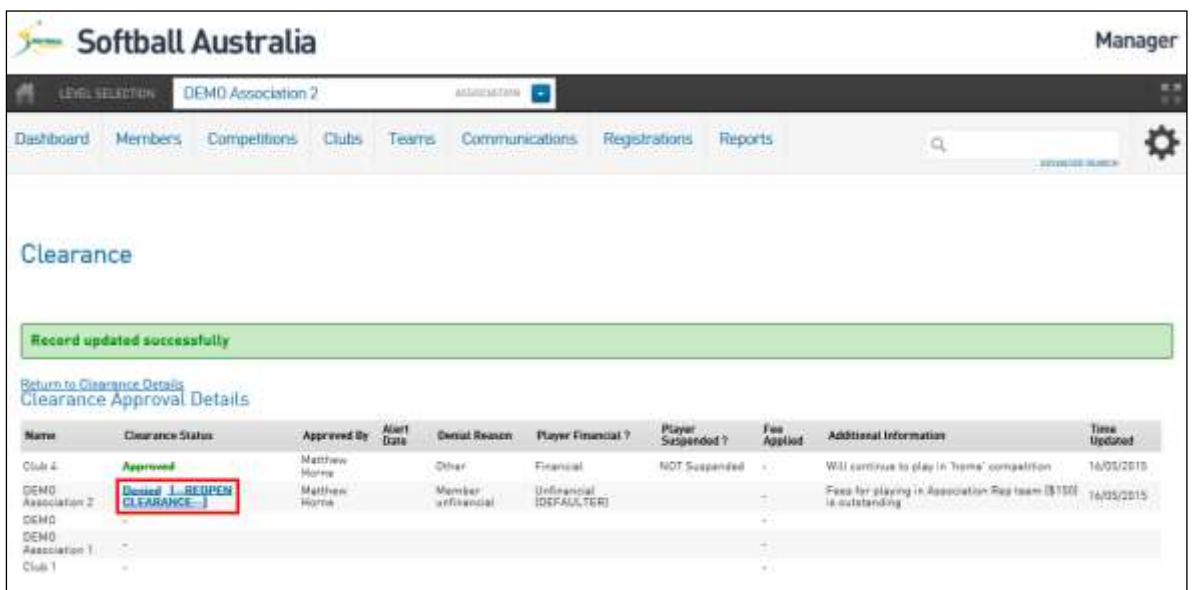
113 Once you have completed the form, click **Update Clearance** and you will see.....



114 Now Demo Association 2 will show that they have ---**AWAITING Your APPROVAL**--- sitting in their List of Clearances.

115 Once all levels have approved the request, the member is free to move across to participate in the Destination Association and club competitions.

116 If you deny a request, please make sure that you provide a valid reason. Once the player has fulfilled the task that is causing their request being denied, the request can be reopened and approved, eg if the reason is because the player is not financial, then once they have paid the outstanding monies you can go into your **List of Clearances**, reopen and approve their request.










117 Click **Denied [-REOPEN CLEARANCE-]**, update the fields and change the clearance Status to Approved.

Clearance

To modify this information change the information in the boxes below and when you have finished press the **Update Clearance** button.

Note: All boxes marked with a  are compulsory and must be filled in.

Details

Clearance Ref. No.:	1138798
Member being Cleared:	Stokes Taylah
Date of birth:	04/01/1949
Address Suburb:	AMBLESIDE
Address State:	DEMO
From Club:	Club 4
From Association:	DEMO Association 2
To Club:	Club 1
To Association:	DEMO Association 1
Permit Type:	2. Local Interchange
Permit Date From:	10/05/2015
Permit Date To:	05/09/2015
Clearance Status:	Approved  ← Change to Approved
Approved By:	Matthew Horne  ← Name of person making the decision if different to original person
Reason for Denial:	Other  ← Change to Other
Fee involved:	0.00  ← Fees (if any) for the handling the additional work
Development Fee:	0.00
Alert Date:	<input type="text"/> ← Currently not setup for Softball.
Additional Information:	Fee Paid  ← Change to reflect reason for status change
Development Fee:	
Player Financial ?:	Financial  ← Change this if necessary
Player Suspended ?:	NOT Suspended  ← Change this if necessary
Reference Number at this level:	<input type="text"/> ← If you have a reference number at this level.

[Update Clearance](#)

Clearance Approval Details

Name	Clearance Status	Approved By	Alert Date	Denial Reason	Player Financial ?	Player Suspended ?	Fee Applied	Additional Information	Time Updated
Club 4	Approved	Matthew Horne		Other	Financial	NOT Suspended	-	Will continue to play in 'home' competition	16/05/2015
DEMO Association 2	Denied  --REOPEN 	Matthew Horne		Member unfinancial	Unfinancial (DEFAULTER)		-	Fees for playing in Association Rep team \$150 is outstanding	16/05/2015
DEMO	-						-		
DEMO Association 1	-						-		
Club 1	-						-		

118 Click [Update Clearance](#).



NOTE: Softball Australia has implemented a 14 day auto approval of requested permits or clearances if the process is not completed or denied.

At 7 days the registrar(s) at the level the permit is currently waiting for approval from, and all subsequent registrars will receive an email reminding them of the outstand permit. Once the 14 days has passed, then all remaining levels will be set to approved.





The screenshot shows the top navigation bar of the Softball Australia website. It includes the logo, the text 'Softball Australia', a home icon, a 'LEVEL SELECTION' dropdown menu currently set to 'Club 1', and a 'CLUB' button. Below this is a horizontal menu with items: 'Dashboard', 'Members', 'Teams', 'Communications', and 'Reports'. The 'Teams' item is highlighted with a red rectangular box.

119 Functionality is identical as for Association Level.

The screenshot shows the top navigation bar of the Softball Australia website. It includes the logo, the text 'Softball Australia', a home icon, a 'LEVEL SELECTION' dropdown menu currently set to 'Club 1', and a 'CLUB' button. Below this is a horizontal menu with items: 'Dashboard', 'Members', 'Teams', 'Communications', and 'Reports'. The 'Communications' item is highlighted with a red rectangular box. A sub-menu is visible below 'Communications', with the item 'Communicator' highlighted by a red rectangular box.

120 Functionality is identical to Association Level.



The screenshot shows the top navigation bar of the Softball Australia website. It features the Softball Australia logo and the text 'Softball Australia'. Below this is a dark grey bar with a home icon, the text 'LEVEL SELECTION', a dropdown menu showing 'Club 1', and the text 'CLUB'. Below the dark grey bar is a light grey bar with five menu items: 'Dashboard', 'Members', 'Teams', 'Communications', and 'Reports'. The 'Reports' menu item is highlighted with a red rectangular box.

121 The [Reports](#) menu will be covered in its own separate training module.

