

and

# **Affinity Sports**

**User Guide** 

For

**League/Club Level Users** 

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### I. Introduction

This guide's intended purpose is to assist League level users with a step by step walkthrough of system basics.

Affinity Sports provides numerous features that its users can take advantage of, but many will use the system to simply add players, teams, and administrators and print rosters and member passes. This reference guide is divided into several sections dealing with configurations, player and administrators, teams, and reports. Each screen shot represents a tab, button, option, and menu the user will use while performing basic functions.

Where necessary, a **TIP, NOTE, or GLOSSARY** has been added for additional information.

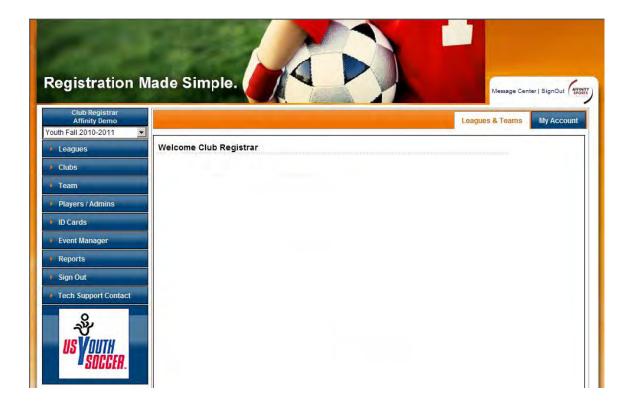
# **II. Affinity System Overview**

Welcome to the **Affinity Sports** System, a web-enabled sports organization management system. This system will enable users to manage their Leagues, Clubs, teams, players, parents, coaches and administrators. The following information provides users with a reference guide outlining the various functions of the Affinity System and how to use them.

# A. Log on to the new Affinity System

- **Access** the system at: http:// [association url name]
- **Enter** Your Username and Password in the left navigation menu area shown below:





### **B. Basic Navigation**

Once you login, your personal **Welcome** screen appears in the **"Leagues & Teams"** section of the system and you are provided with a left navigation menu bar. From here users can manage and configure their league and or club.

The system has two areas of navigation

### Top navigation

- o **My Account:** This is used to access the users personal information
  - My info
  - Message Center
- Leagues and Teams: This is used to access the main system functions in the Left navigation menu

### Left navigation menu

- Season drop down
- Leagues: Leagues is our system terminology for the 'corporate parent of your club' you will perform few but important functions in this area
- Clubs: Complete most configurations including those for online registration
- Teams: Create teams, search for teams, roster players/admins, and print passes
- Players/Admins: Search for, add, edit players and administrators
   and access reports for players and administrators
- **ID Cards:** Bulk print player and admin passes
- Event Manager: Create and manage tryouts, camps, and clinics
- Reports: Access financial, team, player/admin counts and many other reports
- Sign Out
- Tech Support Contact: Create a Help Ticket that will be sent to all of our friendly staff for quick assistance

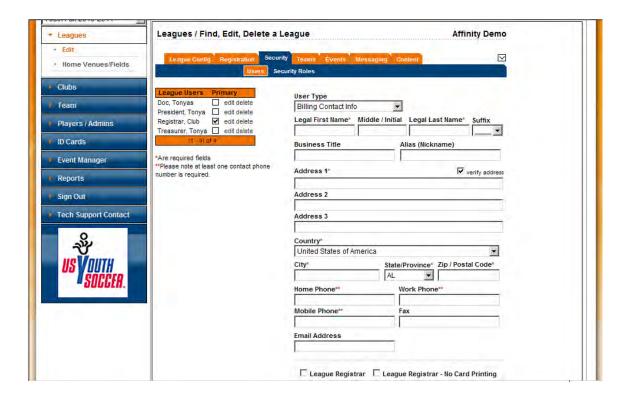
TIP: at the top left hand corner of the screen is a drop down box for SEASON. If your league is coordinating more than one season at a time, make sure that the correct season is selected from the drop down menu in the left navigation menu area

# III. League Level Configurations

There are multiple functions at the league level; but only four that the average club will need to utilize. The following four tabs/sub tabs are the only ones you will need to access; **Security** (creating user profiles), **Level of Play** (creating play levels), **Season** (turning on the season), and **Teams** (performing *Migration* copying teams, players, and administrators from a previous season to the current season). If you have questions on the other functions at the League level please contact us by clicking on Tech Support Contact in the left navigation menu.

# A. Creating user profiles

- ✓ Select "Leagues & Teams" top navigation and
- ✓ **Click** "Leagues" from the left navigation menu
- ✓ **Click** on the "Security" tab to add users to the League (User information can be edited or deleted from the system at any time)
- ✓ Complete the blank user form
- ✓ Assign user permission/capabilities (check the desired box underneath the email field) by placing a check next to the desired permission level
  - o Permissions:
  - o League Registrar = Full Access
  - o League Registrar no card printing = High Access few limitations
  - o League Registrar Assistant = High Access few limitations
  - o Treasurer = Med Access several limitations
  - o Director of Coaching = Med Access several limitations
  - o League Board Member = Low Access view only
  - o President = Low Access view only
- ✓ Create a username and password for the user
- ✓ Click "Create" Button

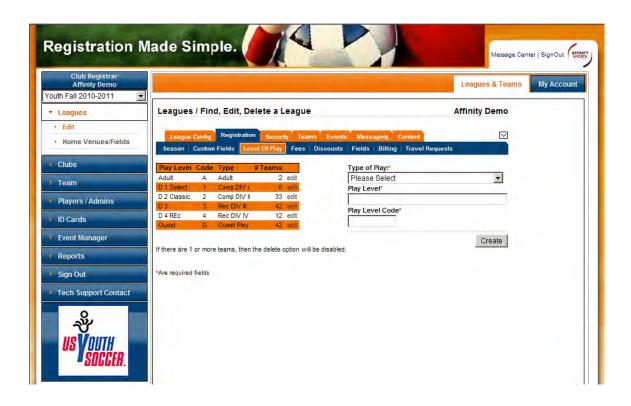


TIP: Though the permission levels on the system are named after League and Club roles they have nothing to do with the role of the person within their organization but control what the user can do on the system. For example a President with full access would need to have the permission level "League Registrar" selected

**Note:** Seasons, Play Types and Age Groups must be configured and activated at the Association level before the League/Club can designate their play levels and age groups for the season.

# **B. Creating Levels of Play**

Before configuring your season it is necessary to create Level of Play.



Tip: This step does not need to be completed each season. If no new levels of play need to be created please skip this area.

- ✓ From Leagues & Teams, select Leagues from the left navigation menu menu
- ✓ Click Registration
- ✓ Click Level of Play
- ✓ Select Type of Play from the drop down menu
- ✓ Enter the name of the play level Example: Select Type of Play Competitive Input Play Level "Comp", input a play level code of [C].
- ✓ Click "Create"
- ✓ Add additional Levels of Play following the steps above until all have been created

# C. Setting up the Season

Once the Association has opened up the season, the League and Club levels need to configure the season.



NOTE: Current as well as past seasons will be listed depending on the length of time your organization has utilized the system. Icons may appear to the right of each season; No icons represent that no configurations have been done for that season. A check mark represents that configurations have been selected within that season. An eye icon indicates that the season is turned on and shown to the public.

- ✓ From Leagues & Teams, select Registration
- ✓ Click Season

This will open the season screen and will list all the active seasons created by the Association.

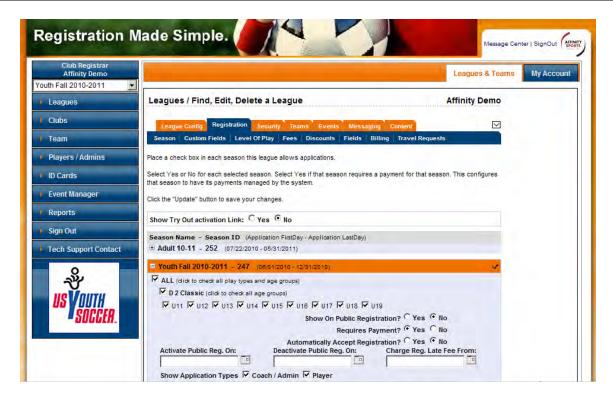
- ✓ Click on the [+] next to the season you want to configure for your league/club. This step must be done at the **League Level** and the **Club Level**.
- ✓ Check the play type and the ages that you allow to register for a specific play type.
- ✓ Check "YES" show on public registration to allow players to register online.
- ✓ Check "YES" requires payment.

✓ Automatically Accept Registration — You can check YES if you want to automatically accept players registering Online or NO if the club wants to accept the player after they have registered ONLINE.

Tip: If you are new to the system or the play type is competitive it is recommended that you check "NO" for automatically accept.

- ✓ **Activate Pub Reg ON –** you can enter a date or leave this field blank
- ✓ **Deactivate Pub Reg On –** you can enter a date or leave this field blank
- ✓ Charge Reg Late Fee From enter a date only if you plan to charge a registration late fee.
- ✓ Show Application Types check both Coach/Admin and Player.
- ✓ Click Update when you have completed the above steps for all play types and age groups.

NOTE: The age groups in the season grid are player seasonal ages not Team Age Groups. You will need to check any age accepted by your club. Example: U7 is a 6 year old; however your club may only have U8 and up Teams but you allow 5, 6 and 7 year olds to be rostered to a U8 team.



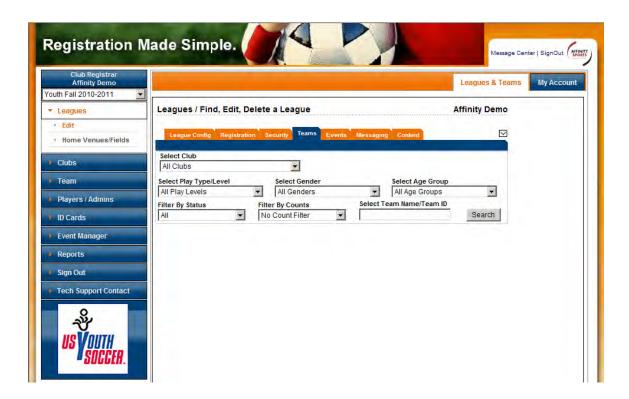
# **D.** Migration

**NOTE:** Migration is **not a** necessary step to opening a new season or setting up online registration. If you are not familiar with the migration process or do not need to migrate teams please skip this step.

The purpose of this area is to allow users to migrate previous season teams, players, and administrators to the current season. In order for this to work you must have teams, players, or administrators in a previous season.

Once a migration has been completed the teams will appear in the current season, and the age of the team will have moved up one (except in the case of migration from Fall to Spring of the same seasonal year). Players and/or Administrators will have a new application created for them in the current season once a migration is completed.

Tip: Please be aware that you can only migrate information one time. For example; if you migrate the players from team "kickers" you cannot go back later and migrate the administrators from the same team.



- ✓ Select the season you wish to migrate from in the season drop down
- ✓ Select League from the left navigation menu
- ✓ Click Teams from the tabs at the top

- ✓ Define the search criteria using the drop down menus for each field to search for a set of Teams or enter a team name or ID # to search for a specific Team.
- ✓ Check the boxes on the left hand side of each team(s) to move or migrate and 

  Click "Migrate Selected" Button.



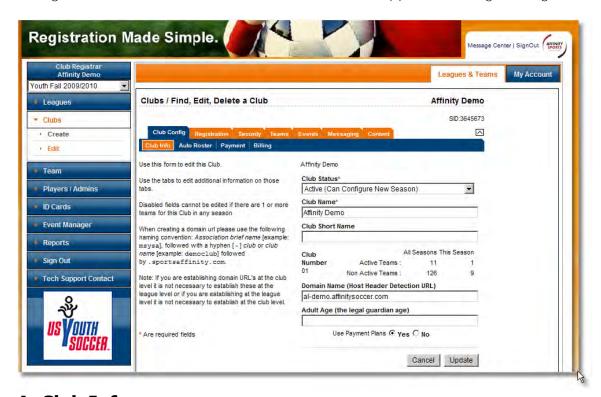
- ✓ Once the Teams are selected Click the "Migrate Selected Teams" Button
- ✓ Select the season from the drop down menu you want to migrate to.
- ✓ Use the select all to migrate all Administrators, All Players and All Teams or check the individual columns to migrate any individual or combination of the three items to the selected Season.
- ✓ If not satisfied with the selection Click "Cancel Migration Request" Button
- ✓ Otherwise Click "Save Migrate Request" Button
- ✓ Verify that data has been migrated to the new season by performing a search in Team Look-up, Admin Look UP or Player Look-UP. Migrating teams to a new season automatically advances the age group of the Team.

Tip: T = Team, P = Players, A = Administrators. By checking all three you will migrate the entire team with players and administrators assigned. By selecting only T you will migrate only the team without players or administrators. Selecting only P or A will migrate the players or administrators and they will not be assigned to a team in the season you migrate to.

# IV. Club Level configurations

✓ From Leagues & Teams, click Clubs from the left navigation menu to access the club level configurations

The club level is the level where the majority of configurations will be set this is due to the fact that this is where the URL for the club is configured. Though the system allows the user to configure settings at the league level, it is always best to have your configurations at the club level as this is where the applicants will go to register.



### A. Club Info

The above screenshot shows the Club Info screen. This screen is where the user will create the URL (web address) that applicants will go to register. When creating the URL use the following naming convention: uysa-xxxx.affinitysoccer.com (replace xxxx with club name or abbreviation)

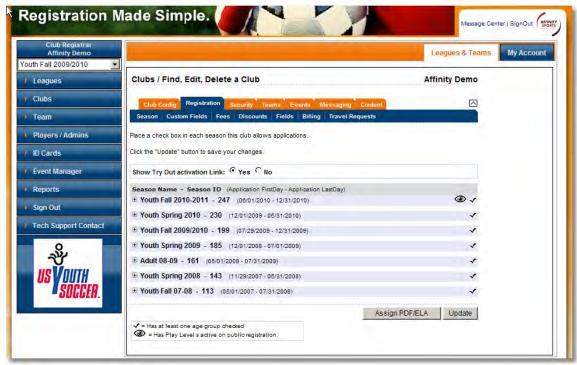
Other functions available on this screen are the ability to change the "Club Status", which will enable or disable the clubs ability to configure new seasons. Editing the "Club Name" and "Short Name".

- ✓ From Leagues & Teams, click Clubs from the left navigation menu
- ✓ Select "Club Info"
- ✓ Create club URL in the "Domain Name" field
- ✓ Once URL is created and desired data is updated, select the "Update" button.

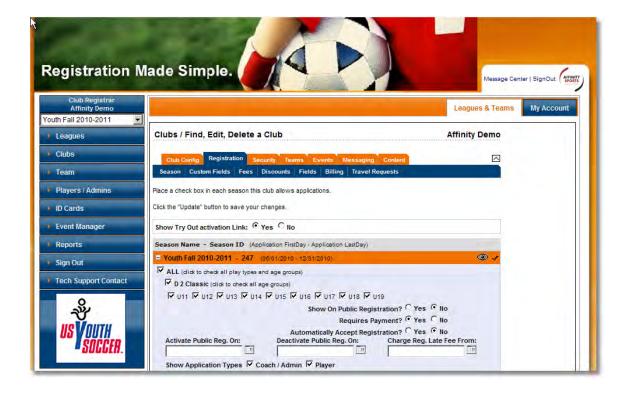
# **B.** Club level season configuration

- ✓ From Leagues & Teams, click Clubs from the left navigation menu
- ✓ Select Registration
- ✓ Select Season

This will open the season screen and will list all the active seasons created by the Association.



- ✓ Click on the [+] next to the season you want to configure for your league/club. This step must be done at the **League Level** and the **Club Level**.
- ✓ Check the play type and the ages that you allow to register for a specific play type.
- ✓ Check "YES" show on public registration to allow players to register online.
- ✓ Check "YES" requires payment.
- ✓ **Automatically Accept Registration** You can check **YES** if you want to automatically accept players registering Online or **NO** if the club wants to accept the player after they have registered ONLINE.



Tip: If you are new to the system or the play type is competitive it is recommended that you check "NO" for automatically accept.

- ✓ Activate Pub Reg ON you can enter a date or leave this field blank
- ✓ **Deactivate Pub Reg On –** you can enter a date or leave this field blank
- ✓ Charge Reg Late Fee From enter a date only if you plan to charge a registration late fee.
- ✓ Show Application Types check both Coach/Admin and Player.
- ✓ Click Update when you have completed the above steps for all play types and age groups.

NOTE: The age groups in the season grid are player seasonal ages not Team Age Groups. You will need to check any age accepted by your club. Example: U7 is a 6 year old; however your club may only have U8 and up Teams but you allow 5, 6 and 7 year olds to be rostered to a U8 team.

Glossary: "Show on Public Registration" means that if a user comes to your website to register, they will be able to complete a registration. If you are not ready to turn this function on and allow users to register keep this option selected to "No"

If "Yes" is selected you must have a checkmark in either the "Coach/Admin" or "Player" check boxes listed to the right of "Show Application Types". If these are not checked and "Show on Public Registration" is selected to "Yes" the user will not be able to proceed through the registration process.

"Requires Payment" is as stated. At the end of this registration a payment is either required or it is not. Select the appropriate button.

"Automatically Accept Registration" will automatically accept the users application once it has been submitted. It is recommended that this is selected to "No" as once a player has been accepted only UYSA state office or Affinity Tech support can un-accept a player.

The last 3 fields that can be configured are the "Activate Public Reg On:", "Deactivate Public Reg On:", and "Charge Reg Late Fee From:"

By utilizing these fields user can automate when registration opens, closes, and starts charging late fees. When utilizing these fields please use the small calendar on the right of each field to enter the dates desired. (\*Please note that when a date is entered, the system will perform said action at 12:00am on said date. Ex. "Deactivate Public Reg On" 01/22/2010, the system will turn registration off at exactly 12:00am 01/22/2010)

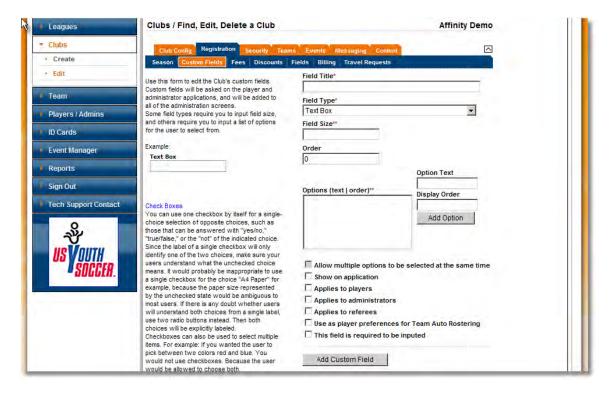
Also when utilizing "Activate Public Reg On" the system requires that "Show On Public Registration" is set to "Yes". The system will not allow users to proceed until that date is reached.

# **C. Creating Custom Fields**

Custom fields allows user to create custom questions that will appear during the registration process. The user can create as many custom questions as they wish.



- ✓ From Leagues & Teams, select Registration
- ✓ | Click Custom Fields
- ✓ Enter Field Title
- ✓ Enter Field Type using the drop down menu
- ✓ If a Text Box is selected input the field size
- ✓ If **check boxes**, **radio Buttons**, or **drop down menus** are selected as the field type options, enter the option text and **click Add Option**. Continue until all options have been entered.
- ✓ Check the boxes to select how the Custom Field will be applied.
  - Show on Application
  - Applies to Players
  - o Applies to Administrators
  - This field is required to be input
- ✓ Click "Create" Button
- ✓ Custom Fields that has been created will appear on the opening Custom field screen and can be edited or deleted at any time.



Above is the default custom field page if no custom fields have been created otherwise user is taken to the above page after selecting the "here" link. On this page the user will create their custom field by naming the custom field in the "Field Title" text box, selecting the "Field Type" (the available field types are listed below), "Field Size" (if

applicable), "Order", "Option Text", "Display Order", "Options (text/order)", then by placing checks in the appropriate boxes for whom custom field applies.

Glossary: Field Types are as follows (A visual example is available to the left of the screen when field type is chosen):

Check Boxes: Check boxes require user to name each check box in "Option Text" field, & give an order for how they are displayed. Once done select "Add Option" Drop Down List: Drop down list requires user to name each choice in "Option Text" field, & give an order for how they are displayed. Once done select "Add Option" List Box: List box requires user to name each selectable option in "Option Text" field, & give an order for how they are displayed. Once done select "Add Option" Radio Button: Radio button requires user to name each selectable option in "Option Text" field, & give an order for how they are displayed. Once done select "Add Option" Text Box: Text Box will require user to input a numeric value in "Field Size" field. The Field Size is to determine the amount of characters allowed to be input when answering question.

#### D. Fees

If the league or club is using Online Registration it is necessary to configure fees for each play level and age group. Additionally the system provides payment plan options that can be selected when completing an Online Registration. Follow the steps below to set up the fees for each play level and age group. Once fees have been created, payment plans can then be configured.

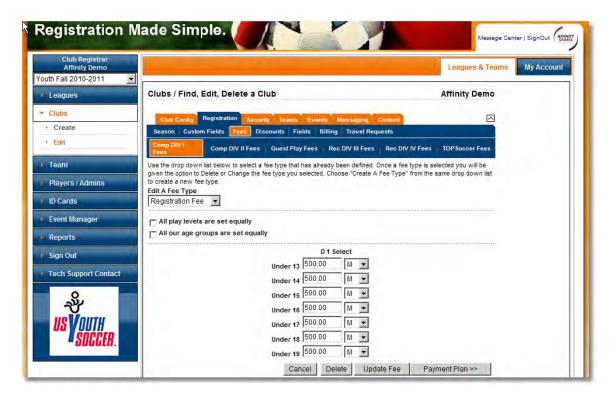
# 1. Creating Fees

- ✓ From Leagues & Teams, click clubs from the left navigation menu
- ✓ *Click* Registration
- ✓ Click Fees
- ✓ Select the Play Level you want to create fees for
- ✓ From the "New Fee Type" drop down menu **select** the desired fee type or create a custom fee type by selecting "Other" from the drop down menu and then naming the fee in the "Other Fee Type" text box.
- ✓ Enter the fees for each age group

Tip: If all play levels or age groups have the same fees check the 'priced equally' boxes. Enter the fee in the first fee box and the system will automatically populate all the fee boxes.

✓ The system also allows you to define if a fee should be displayed as

- M mandatory on the registration process
- o **OS** Optional but by default the fee will be selected
- o **ON** Optional but by default the fee will not be selected.
- ✓ **Click** "Create Fee" **Button** when completed.



**NOTE:** Once fees are created they can **be edited by selecting "Edit Fee Type". Any** Fees created will appear in the drop down list. Fees must be created before a payment plan can be created.

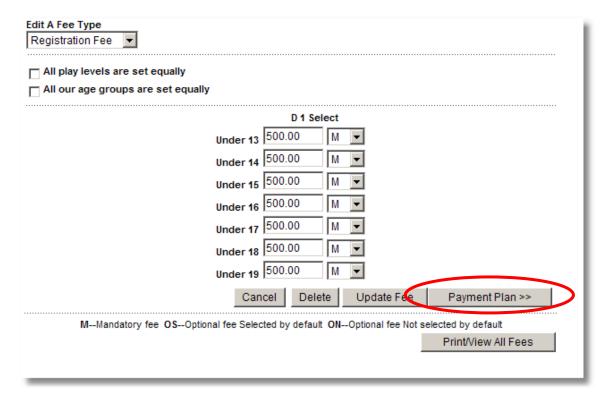
# 2. Setting up Payment Plans

After all fees have been created payment plans can be configured.

NOTE: Payment plans are not a required step in setting up online registration.

- ✓ **Select** From Leagues & Teams, **click** Clubs
- ✓ *Click* Registration
- ✓ *Click* Fees

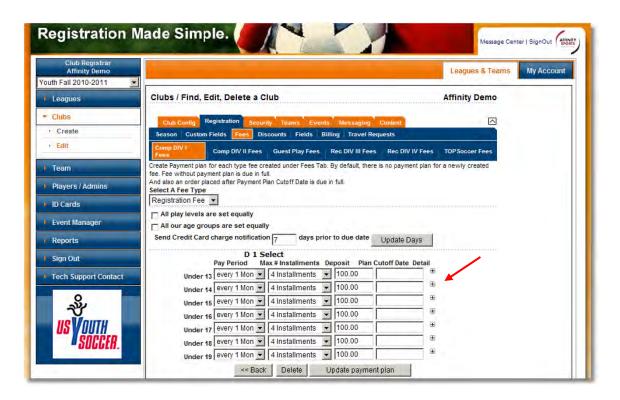
- ✓ Select from "Edit A Fee Type" drop down menu the fee type that was created. This will display the fees created for that specific fee type.
- ✓ To set up payment plans Click on the Payment Plan Button at the bottom of the page

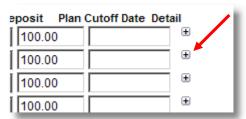


- ✓ Determine if all of the fees are the same for "All play levels" and/or "All age groups".
- ✓ Based on your requirement you can use the two check boxes to have the system fill the information in the Fee table.
- ✓ Set the amount of days the user will be notified before their credit card will be charged. System default is 7 days.
- ✓ Select:
  - o Pay Period: Determine how often the payment plan will occur. Ex. Every 1 month, 2 months, three months etc.
  - o Max# Installments: Number of installments to be used
  - o Deposit: The deposit amount.

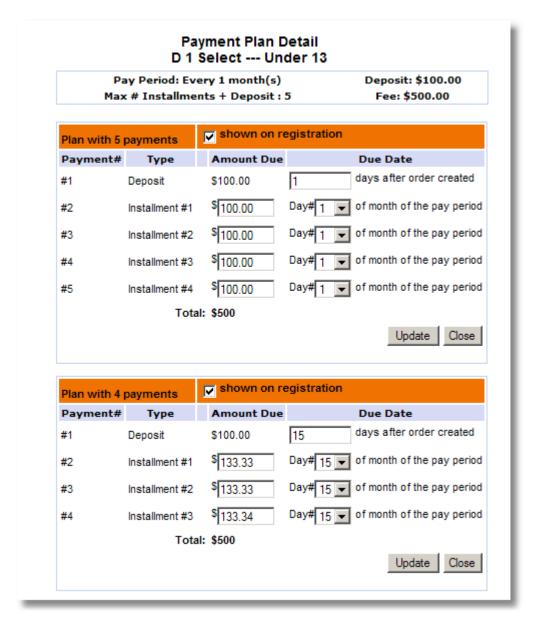
Tip: The deposit amount becomes a fixed amount in the payment plan. It is recommended to leave the deposit field blank to provide you with greater freedom. The first installment then becomes the "deposit" and is editable.

- ✓ Enter the Plan Cutoff Date: the system uses this for defining the number of installments that are allowed for the payment plan.
- ✓ Once the payment plan has been configured for each play level and age group,
  Click Update Payment Plan Button to save.
- ✓ Once the page is refreshed the system will return a page that shows (+) for each age group listed.
- ✓ **Click** on the (+) sign to further define the payment plan for the particular item.





- ✓ By Clicking on the (+) the following window will be displayed.
- ✓ You must click apply for customized payment plans to be applied to all age groups.



- ✓ From this window you can select the number of installments plans available based on the earlier configuration.
- ✓ You can select the number of days before the system will charge after an order has been created.
- ✓ You can define the amounts of the installments and the Day of the month that the installment will be charged.

✓ Based on the configuration for the "Send credit Card Charge Notification" the system will send an email notification for the Charge.

#### F. Discounts

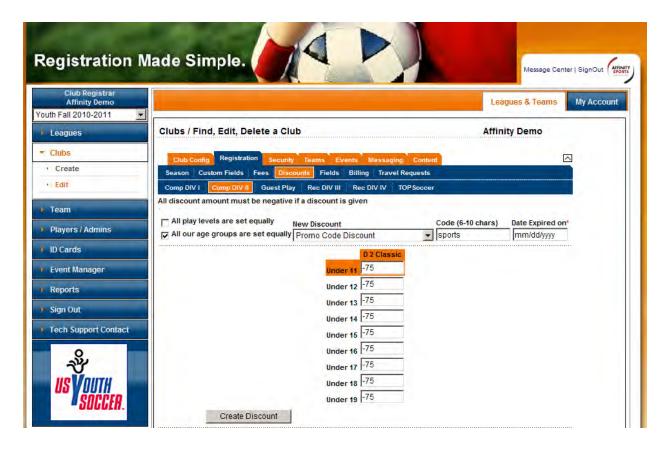
Discounts allow league users to create and manage multiple types of discounts both internally and through online registration.

#### 1. Promo Codes

The promotion code is the most versatile of our discount features. Multiple promotion code discounts can be created in varying amounts by age group and play type/level. Promotion codes can be used internally by state, league, and club administrators, during online registration by parents (players), and from with in the parent's "my account". The discount is only applied if the user has the code.

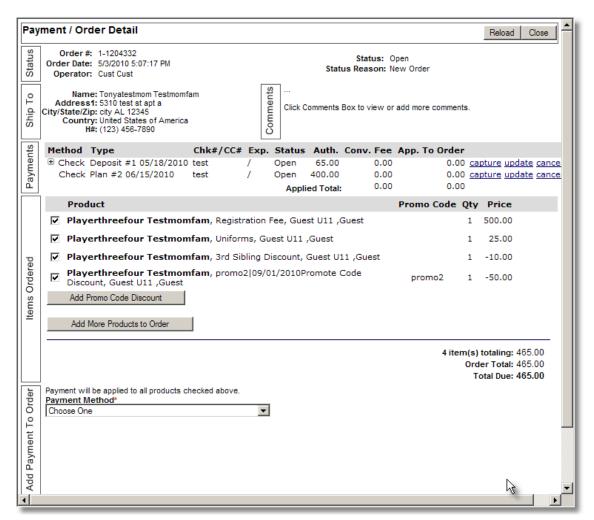
#### To configure a promotion code:

- ✓ Select Clubs from the left navigation menu
- ✓ **Click** on the Registration tab
- ✓ Click on the Discounts sub tab
- ✓ **Click** on the desired play level
- ✓ Select Promo Code Discount from the New Discount drop down
- ✓ Enter the desired code in letters and/or numbers (must be at least 6 characters)
- ✓ Enter the expiration date
- ✓ Enter the desired amount of the discount
- ✓ Click create



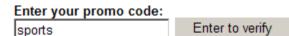
### To apply the promotion code to an order internally:

- ✓ Go to players/admins in the left navigation menu
- ✓ Go to either player look up or payment management
- ✓ Search for the desired player
- ✓ Click on their order number to open the order
- ✓ **Click** on the Add promo code discount button



A new window will open

- ✓ Enter the promo code in the box provided
- ✓ Click the Enter to verify button





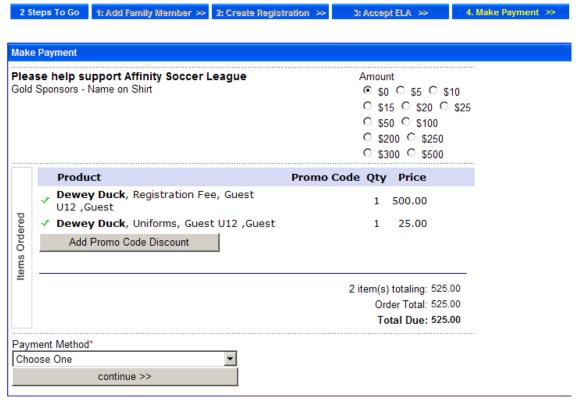
Close & Refresh Order/Payment Page

A promo code can be use only one time for an order

- ✓ Click on the Add this discount to your order button
- ✓ Click on the Close & Refresh Order/Payment Page button
- ✓ The promo code discount will be applied to the order

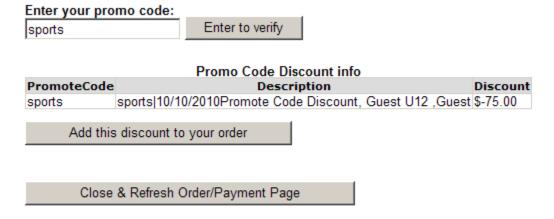
### To use the promo code during online registration (for parents/players):

- ✓ Register online
- ✓ Once the payment page is reached; click on the Add promo code discount button



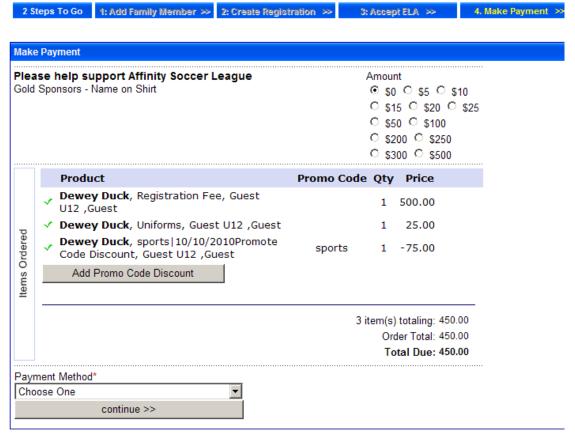
A new window will open

- ✓ Enter the promo code in the box provided
- ✓ Click the Enter to verify button



A promo code can be use only one time for an order

- ✓ Click on the Add this discount to your order button
- ✓ Click on the Close & Refresh Order/Payment Page button
- ✓ The promo code discount will be applied to the order



✓ Proceed with registration

### To use the promo code from the "my account" screen (for parents/players):

- ✓ Log in
- ✓ Scroll down to the Registration Applications section
- ✓ Search for and click on the Payment Edit link (if an order has not been created yet, they will first need to click create order then payment edit)



✓ Click on the Add promo code discount button

#### Make/Edit Application Payment

My Account

<< back to my account

Below is the order for the registration application you choose. Make a payment by choosing a payment type and the pressing the continue button. To cancel this action click the "<< back to my account" at the top of the page.

For payment plans: Click the check box next to each scheduled payment to pay that payment now.



A new window will open

- ✓ Enter the promo code in the box provided
- ✓ Click the Enter to verify button

Enter your promo code:

sports

Enter to verify

Promo Code Discount info

PromoteCode Description Discount sports sports | 10/10/2010Promote Code Discount, Guest U12 ,Guest \$-75.00

Add this discount to your order

Close & Refresh Order/Payment Page

A promo code can be use only one time for an order

- ✓ **Click** on the Add this discount to your order button
- ✓ Click on the Close & Refresh Order/Payment Page button

The promo code discount will be applied to the order

#### 2. Sibling Discount

Sibling Discounts allow you to configure different discount amounts per sibling.

- ✓ Go to **clubs** on the left
- ✓ Click on the Registration tab
- ✓ Click on the new **Discounts** sub tab located next to fees
- ✓ Select the desired play level
- ✓ Discounts are entered in the same manner fees are entered; Select the desired discount type from the **New Discount** drop down
- ✓ Enter the desired amount of the discount per age group (to enter the same amount for all age groups, check the **all our age groups are set equally** check box at the upper left)
- ✓ **Click** the **Create Discount** button

The following discount types are now available:

#### Select a Discount Type

2nd Sibling Discount
3rd Sibling Discount
4th Sibling Discount
5th Sibling Discount
Additional Sibling Discount after 5th
Promo Code Discount
Return Player Discount

- **2<sup>nd</sup> Sibling Discount** will automatically discount the configured amount from the second registered sibling in a family
- **3<sup>rd</sup> Sibling Discount** will automatically discount the configured amount from the third registered sibling in a family
- **4<sup>th</sup> Sibling Discount** will automatically discount the configured amount from the fourth registered sibling in a family
- **5<sup>th</sup> Sibling Discount** will automatically discount the configured amount from the fourth registered sibling in a family

**Additional Sibling Discount after 5<sup>th</sup>** – will automatically discount the configured amount from the 6<sup>th</sup> etc. registered sibling in a family not to exceed the amount entered in the **Max Siblings Discount** text box. All sibling discounts must not exceed the amount entered under Max Siblings Discount including the sum total of the second, third, fourth, and fifth sibling discounts.

### 3. Returning Player Discount

This discount will automatically discount the configured amount from a player returning from the selected previous season. User must enter the desired previous season from the select a season drop down.

- ✓ From Leagues & Teams, click on clubs from the left navigation menu.
- ✓ Click on the Registration tab.
- ✓ **Click** on the new **Discounts** sub tab located next to fees
- ✓ Select the desired play level
- ✓ Discounts are entered in the same manner fees are entered; Select Return Player Discount from the **New Discount** drop down
- ✓ Enter the desired discount amount (to enter the same amount for all age groups check **All our age groups are set equally**)
- ✓ Select the desired previous season (The player will have to have played in that previous season to receive the discount)
- ✓ *Click* Create Discount



### F. Online Registration pages: Fields

The "Fields" area is used to customize the Online Registration process. In this area you will be able to specify which fields are required, shown, or hidden, as well as add any informational text to your pages that you choose communicate to your members.

- ✓ From Leagues & Teams, click on Clubs from the left navigation menu
- ✓ **Click** on Registration
- ✓ Click "Fields"
- ✓ Click On the Registration pages configuration link



# 1. Type of online registration

The first page you will see is where you determine if you are doing a "Club" registration (normal sign up process) or a "Team" registration, where the applicant will select the team they are registering to prior to completing the online registration. Team registration will place user on team once registration is complete.

✓ Next to each registration type you will be given the choice to hide, show or make the registration type required.

- ✓ Please select the appropriate configuration.
- ✓ Once done **click** the "Save" button.

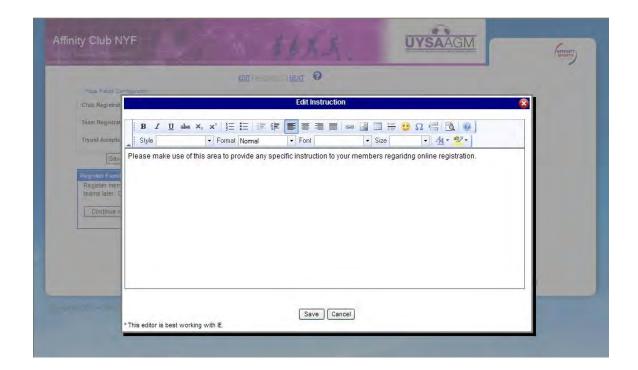
Tip: At the top of each page of the online registration process there are three links:

#### **Edit | Previous | Next**

The **Edit** link opens a content editor that allows you to add text to the top of the page. Text added will be viewable during the online registration process. The **Previous** link allows the user to return to a previous page. The **Next** link takes the user to the following page of the online registration process.



# 2. Editing the online registration flow

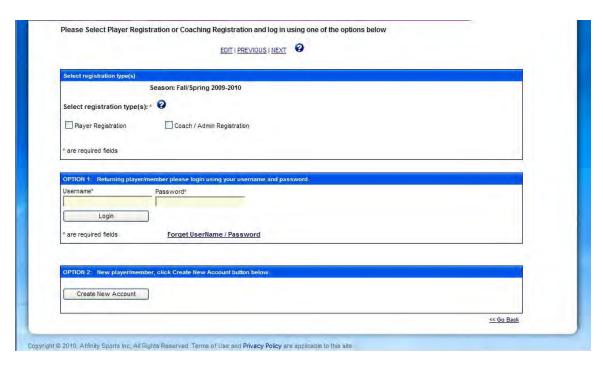


The above screenshots show the content editor when the "Edit" link is selected.

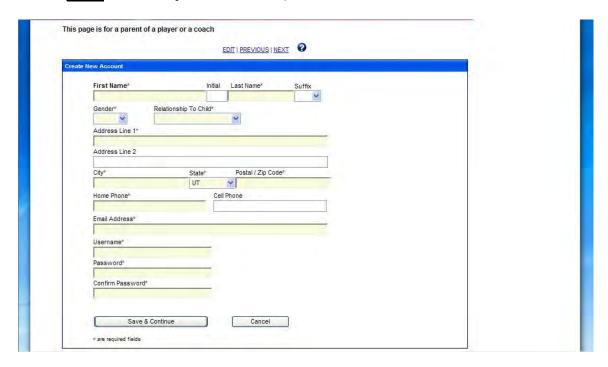
✓ Once changes have been made, **click** the "Save" button. The page will close and your text will appear at the top of the page.

The following pages are seen during the registration process unless otherwise noted.

✓ Click Edit to adjust or Next to proceed



✓ Click Edit to adjust or Next to proceed



✓ Click Edit to adjust or Next to proceed

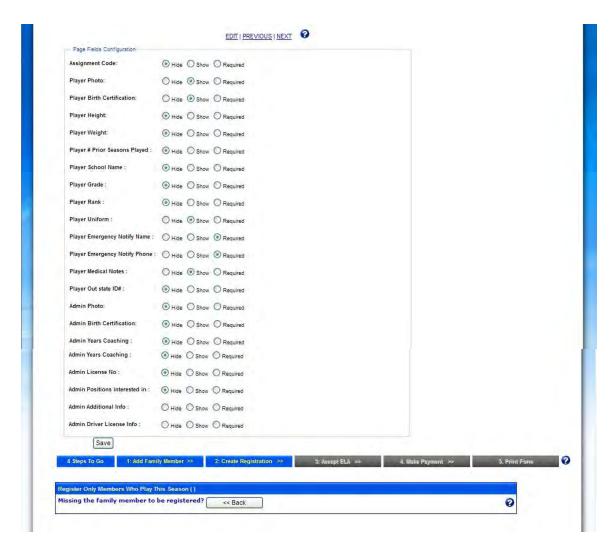
During an actual registration the below page looks slightly different, it would show primary contact information and if the account is new or the user accessed the correct account with their sign on the "Yes, it is my account" and "No, it is not my account" button will be replaced with buttons to add players, and parents/guardians. This screen is also shown when the system matches a person to an existing account. If the account

holder is missing any information, such as address, phone number, and email address, it is required that it be updated before user can complete the online registration.



The below screen is for configuration only and is not shown during the registration process, it shows a list of items that can appear on the application portion of the registration. All items can be set to either hide, show, or required.

- ✓ Make desired selections
- ✓ **Click** the "Save" button underneath page fields configuration.



✓ Click Edit to adjust or Next to proceed

During the online registration process, once the user reaches this page they will see the electronic legal agreements that must be initialed and signed.



✓ Click Edit to adjust or Next to proceed

This page is where users will select their payment method.



✓ Click Edit to adjust or close the page if completed

The Thank You page below is the last page the user will see during the registration process. On this page the user can print forms and/or print their ELA. Once this page is reached the online registration process has been successfully configured.



# G. Creating user profiles

Add users to the club level only if you do not want them to have access to the League level.

- ✓ Select "Leagues & Teams" top navigation
- ✓ **Click** "Clubs" from the left navigation menu area.
- ✓ **Click** on the "Security" tab to add users to the League. User information can be edited or deleted from the system at any time.
- ✓ Complete the blank user form
- ✓ Assign user permission/capabilities (check the desired box underneath the email field) by placing a check next to the desired permission level

Permissions:

League Registrar = Full Access

League Registrar – no card printing = High Access few limitations

League Registrar Assistant = High Access few limitations

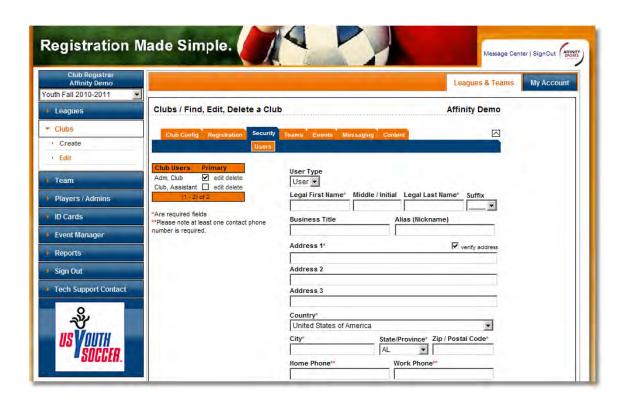
Treasurer = Med Access several limitations

Director of Coaching = Med Access several limitations

League Board Member = Low Access view only

President = Low Access view only

- ✓ Create a username and password for the user
- ✓ Click "Create" Button



TIP: Though the permission levels on the system are named after League and Club roles they have nothing to do with the role of the person within their organization but control what the user can do on the system. For example a President with full access would need to have the permission level "League Registrar" selected

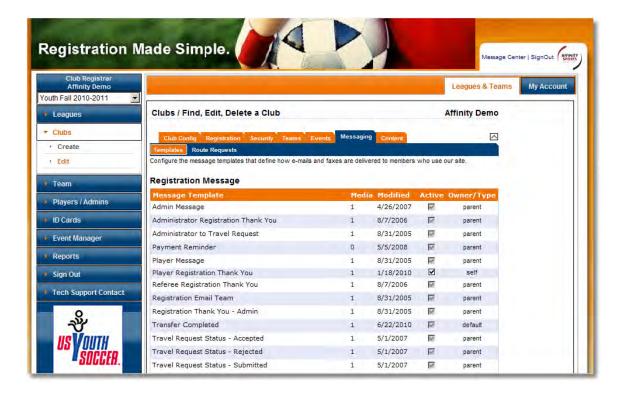
# H. Messaging

The Affinity System provides users with a messaging function. The Messaging function provides users with the capability to:

- Have the system send email based on certain functional triggers in the system such as Player submitting applications, payment plan notifications.
- View all of the email messages sent by the user through the system and verify that they have been sent.
- View all of the email messages sent by the system based on various triggers and verify that they have been sent.
- View unsent emails and have the capability to resend the emails.
- View, edit, and activate the email templates for the various triggers.

## 1. Templates

- ✓ **Click** on Leagues & Teams
- ✓ **Click** on Clubs from the left navigation menu
- ✓ *Click* on Messaging
- ✓ By <u>Clicking</u> the **Templates** sub-tab the system will display the following page:



Emails are automatically generated when certain actions are taken such as when a player or administrator registers online, or when a payment plan payment is due.

There are many templates available many of which you may never need to utilize. It is recommended that users focus on the following email templates:

#### **Registration Message** section:

Administrator Registration Thank You Player Registration Thank You

## **General Message** section:

CC Charge notify (for credit card payment plans)

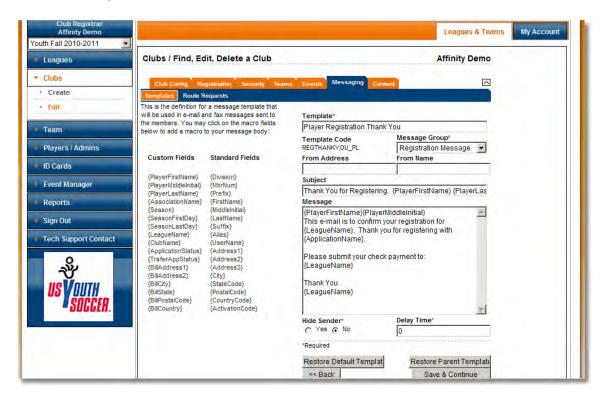
CC Charged (for single credit card payment)

### Glossary:

#### Columns displayed:

- Message Template: This provides the name of the respective Template.
- Media: This shows the number of Media type attached to the Template.
- Modified: This represents the Last Modified date of the Template.
- Active: Shows if the Template is currently active. If the Check Box is checked that means that the Template is active.
- Owner/Type: Shows if the Template is the same as the:
  - Default: Represents the original Template

- Parent: Represents the Template for the Organization
- Self: Means that the Template has been modified at the respective level.
- ✓ From the Configuration section Click on the Messaging Tab
- ✓ By Clicking the Templates sub-tab the system will display the Templates available to be edited.
- ✓ By Clicking an Individual Template line the system will display the respective Edit Template page



- ✓ On the left hand side the system displays Macros available to the user to customize the Message area.
- ✓ On the Right hand side the system provides:
  - o Template: This is the Template name
  - o Template Code: Code name for the Template
  - o Message Group: Displays the Template Group that the template belongs to.
  - From Address: This is an Editable field and should be the "From" email address.
  - o From Name: This is an Editable field and should be the "From" User Name.
  - o Subject: This is an Editable field and should be the "Subject" of the message.
  - Message: This is the area where the user can insert a message for the Template.

- User can include in any area of the body of the message the Macros on the left hand side.
- To include the Macros the user needs have the cursor at the point in the message where the Macro needs to be included and then right mouse **Click.** This will introduce the Macro in the message.
- o Hide Sender: This provides the option to "Hide" the sender information.
- o Delay Time: This allows the user to set a delayed time before the message will be sent. The fields accept minutes for the input.
- ✓ Once the information has been completed **Click** Save **and Continue Button** to save the changes.
- ✓ To restore the original Template Click Restore Default Template Button
- ✓ Use the **Back Button** to return to the Template List.

## 2. Messaging/Route Request

✓ By Clicking the "Route Request" sub-tab the system will display the following page:



- ✓ The page provides two sub-tabs on the right hand side:
  - Sent Messages
  - Unsent Messages
- ✓ **Clicking** the **"Sent"** sub-tab the system displays:
  - o The list of Batches of messages that were sent.
  - o Columns Displayed:
    - Msgs: The number of Messages that were sent in the batch
    - Templates: The Template that was used to send the email
    - Recipient name: From this page since the system displays a batch it does not show the name of the recipient.
    - Status/Error: Status of the batch sent.

- Date: The Date and Time that the Batch was sent.
- ✓ By Clicking on an individual line, which represents a batch the system displays the following page:

Shown below are the individual messages which were part of this message route.



- o Columns Displayed:
  - Media: represents the media type that was used to send the message
  - Subject: Is the subject of the email
  - Sender: Displays the sender of the email
  - Recipient: Is the recipient of the email
  - Error: Provides any information about the email sent.
  - Date: Displays the date and Time that the email was processed.
  - Action: provides the action that can be performed on the email.
- ✓ By <u>Clicking</u> on an individual line, which represents a message the system displays the following page which shows the specific message sent.

#### Message Route Detail

Shown below are the individual messages which were part of this message route

Media	Subject	Sender	Recipient	Status / Error	Date	Action
Email	Carlsbad	Kathy Stanton	Aaron Martinez	Message Sent	n/a	resend
This is a Cli guaranteed Club Trophi Turf to Surf Carlsbad on are only 30	ass I Tournament 3 games, 1st and es will be present Friendlies for a tu 1 fabulous fields, r minutes away fro or more informatio	t, open to USYSA and 2nd place team aw. I 2nd place team aw. ted to Clubs with 3 d une up to Surf Cup. T most of which are Tu m downtown San Die	ed FIFA affiliated team: ards will be awarded in lesignated teams enter he tournament will be urf. Play Dates are July ego, the world famous \$	club to participate in our s and AYSO registered te a special presentation a red in the Club Cup Age ( played in the beautiful be 21-23 We enjoy a mild 7 5an Diego Zoo, Sea World ub.com and click on the T	eams. All to nd 1st and Groups. We each comm O degree I, Wild Anir	eams are 2nd Place will also unity of climate and mal Park and

< < Back to Route Detail

- ✓ Clicking the "Unsent" sub-tab on the right hand side the system displays:
  - o A list of messages that was unsent.
  - o Columns displayed:
    - Msgs: The number of Messages that were sent in the batch. If the column shows a zero that means that there was no message to be sent.
    - Templates: The Template that was used to send the email

- Recipient name: From this page since the system displays a batch it does not show the name of the recipient.
- Status/Error: Status of the batch sent.
- Date: The Date and Time that the Batch was sent.
- Action: The action can be to:
  - Resend the message
  - Delete the message



Note: Users can view all their messages sent through the system under "My Account - Message Center. Message will be listed by From, Subject and Received Date. User can click on subject title to view the message.

### I. Content

Under the content tab you will find four sub tabs that allow users to customize the look and feel of the site.

#### 1. Look N Feel Tab

- ✓ Change the color scheme of the site. Color selections are provided in the drop down menu.
- ✓ Upload site banner using jpg or gif images. Click the **header box** to open a browse screen to add a banner graphic and then Click upload Button to add the graphic.
- ✓ Upload color and black and white logos by clicking the logo boxes to open a browse screen. Click Upload Button to add the logo graphic
- ✓ Add text to the bottom of the left navigation menu area using HTML formatting. Enter the text and **Click** Update **Button**.

Note: This section is not required in order to successfully set up online registration. It is solely for aesthetic purposes.



Below are a selected few of the many color options available.



#### 2. Content Tab

The Affinity System provides tools to add edit and delete content that appears on specific screens. Content is listed with a tag name and grouped by Events, General, Registration, and Tournament and list the owner type.

Owner/Type displays the owner of the content – Default indicates the system is the owner. When content is added or edited by a user the Owner/Type changes to self and these changes are only visible to your organization.

✓ To edit content, locate the group and Click on the content Tag Name. The
description column will provide a brief description of where the content appears
in the Affinity System.



**Tip:** To easily filter through each section utilize the drop down menu located in the upper right hand corner of the screen.

Though there are many pages where content can be adjusted most organizations will need to update only two:

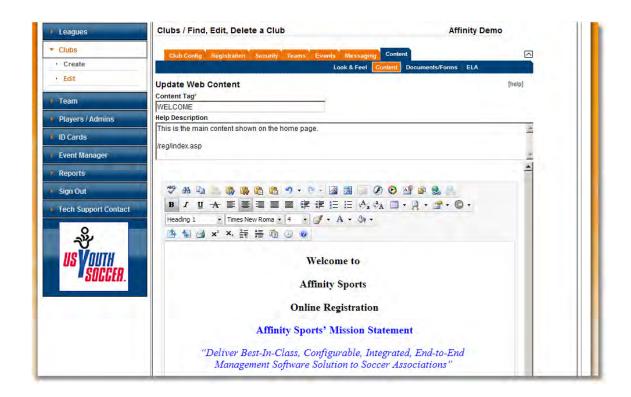
Welcome

Hotsheet (reg\_assoc\_hotsheet)

The welcome screen and hotsheet appear on the opening page of online registration.

## **Creating or Editing Content**

- ✓ From Leagues & Teams, click Clubs from the left navigation menu
- ✓ Click Content
- ✓ Click Content (a sub tab under content)
- ✓ To edit content, **click** on the Content Tag to open the editing screen.
- ✓ Once a tag is selected for editing, the user will be taken into the content editor. This editor will allow the user to post content such as web links, photos, media, flash, tables, html, and text in various fonts.
- ✓ Once editing has been completed Click update Button



#### 3. Documents and Forms

Users can upload required documents and forms that can be printed during online registration and from the My Account area. Forms can be added to

specific areas of online registration by checking the boxes where the form is required.

✓ To upload a document of PDF form Click upload Button. This will open a
browse screen and the form can be uploaded to the system



✓ When the form has been added to **Documents** you can enter description text associated with the form *if desired*.

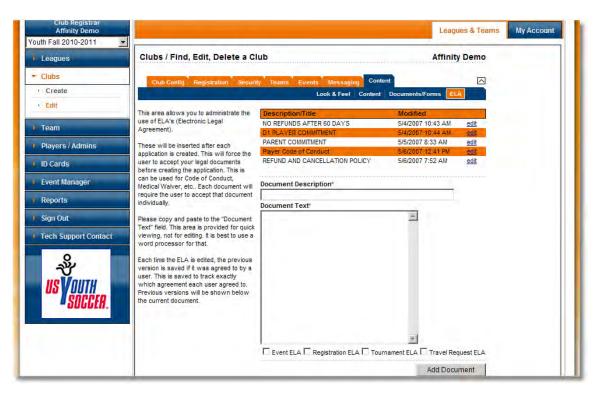


- ✓ Place a check mark next to the type of document being uploaded, for online registration documents select either "Registration Thank You Page Download" and/or "Registration PDF Popup".
- ✓ **Click** "Save Changes" button.
- ✓ If the form is no longer needed Click delete link.

## 4. ELA (Electronic Legal Agreements)

The Affinity System provides the ability to create Electronic Agreements for use with Online Registration for Players, Administrators, Teams and Event registrations. A record of the electronic agreement is saved to an ELA log that is attached to the Player, Administrator and Parent records.

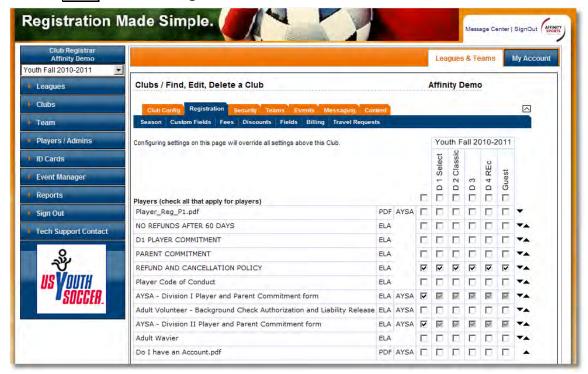
- ✓ From Leagues & Teams select Clubs from the left navigation menu
- ✓ Select Content ELA
- ✓ Existing **ELA's** will be listed by title and modification date. These can be edited or deleted at any time.
- ✓ To create a new ELA Enter a Document Title
- ✓ Enter Document Text
- ✓ Check the boxes where this ELA is to be applied.
- ✓ Click Add Document Button



# 5. Assigning Documents and ELA's

Once ELA's have been created user will need to assign them to the season. Assigning an ELA will allow it to appear during the Registration process as well as forms such as player registration PDF's to print at the end of registration.

- ✓ Under Leagues & Teams select Clubs from the left navigation menu menu.
- ✓ Select the Registration tab, and Season sub tab
- ✓ Click on the "Assign PDF/ELA button near the bottom of the screen



User will be taken to the assign PDF/ELA screen. This will list all current and previous seasons. Your season may be listed at the far right of the screen. If so please scroll right to view current season.

- ✓ Select the ELA and/or PDF options that you want to appear during the registration process by placing a check mark in the boxes that correspond with the ELA and/or PDF and the desired play level and season.
- ✓ **Click** "Save Changes"

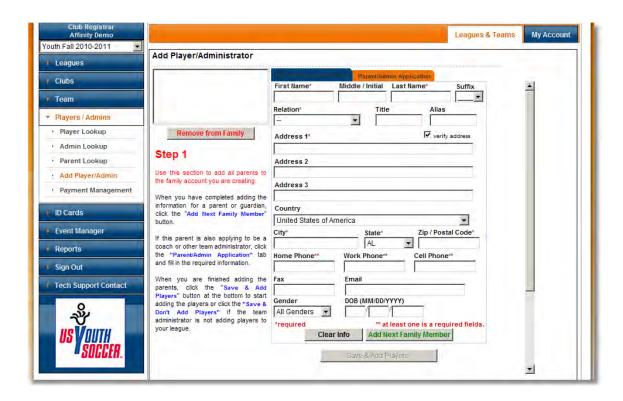
Tip: There will be one grid for players and one grid for administrators. Users can assign documents and ELA's by play type, season, and user role (coach/admin and player).

# V. Players

# A. Adding New Players Internally

As a league administrator you can add entire families on a single data entry screen for the entry of new players.

- ✓ **Click** Player/Admin on the left hand side navigation
- ✓ Click on Add New Player/Admin

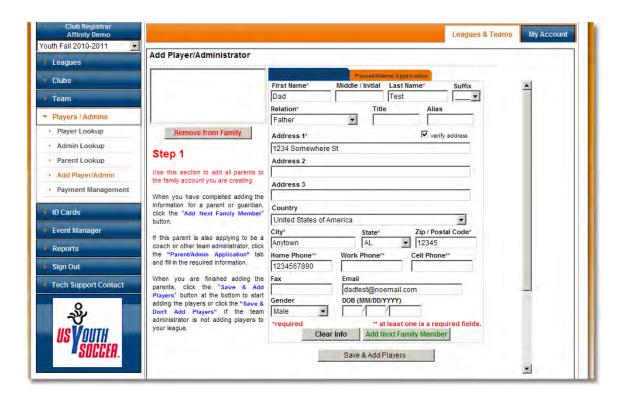


✓ Enter the required parent data as signified by the (\*) next to the data field. To add another parent, **Click** the **Add Next Family Member Button** and proceed as above for the second parent.

At this point you can either proceed immediately to adding the player, or make the parent an administrator (coach, manager, asst. coach).

To proceed immediately with adding a player:

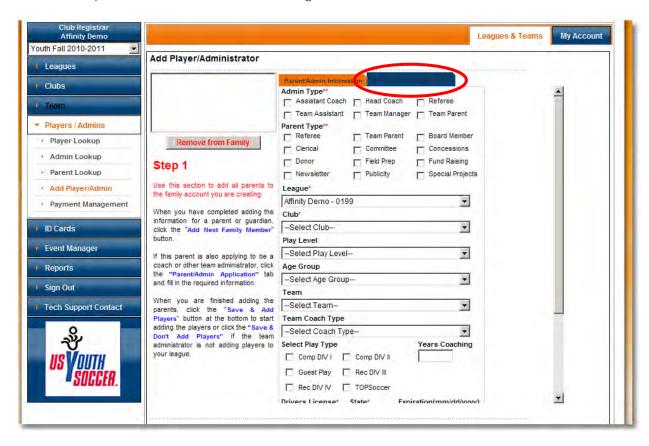
✓ Click Save & Add Players Button



## Add Players/Admins cont'd

If a parent is also applying as a team administrator

✓ **Click** on the **Admin/Coach Information** tab at the top of the form and complete information box including their **email address and driver's license.** 

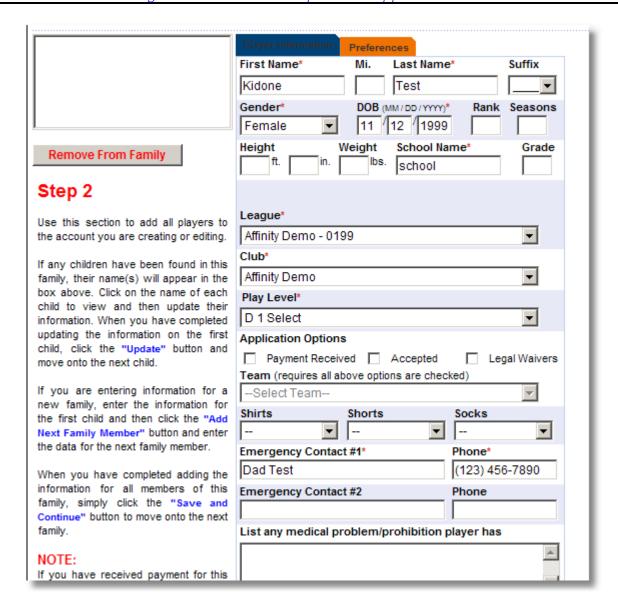


Once all of the parental and/or administrator information has been entered, you have two choices to proceed further.

- a. **Click** Save **and Add Players Button** if the individual enter is a parent will then search the database and find any players associated with the parents.
- b. **Click** Save **and Don't Add Players Button** if the individual entered is only an Administrator.
- ✓ To add a player Click Save and Add Players Button
- ✓ A blank form will be presented to enter the necessary player information.

✓ Click Add next family member Button to enter additional players to the family

Note: The system will attempt to match any parents, administrators, and players that are added. If a match is found the persons associated with the family will appear in text box to the left of the entry form. Click on the name in the text box to fill in the entry form with the existing information and complete the application.



Tip: If teams have been created, the players and/or administrators can be rostered directly to the team during the add player/admin process. To add the players to a team you will have to "clear" them by checking the "payment received", "accepted", and "legal waivers" check boxes.

## **B. Player Lookup**

The Affinity System provides users with the ability to search for players by name, season, gender, play type, age group, club, status, or disciplinary action. Users have the option to perform a full or limited search depending on the criteria and search parameters you establish.

## 1. Searching for players

- ✓ From Leagues & Teams, click on Clubs in the left navigation menu
- ✓ **Click** on Players/Admins
- ✓ **Click** on Player Lookup
- ✓ Establish your search criteria from the various pull down menus.
- ✓ **Click** Search **Button** and a list of all players matching the search criteria will appear.

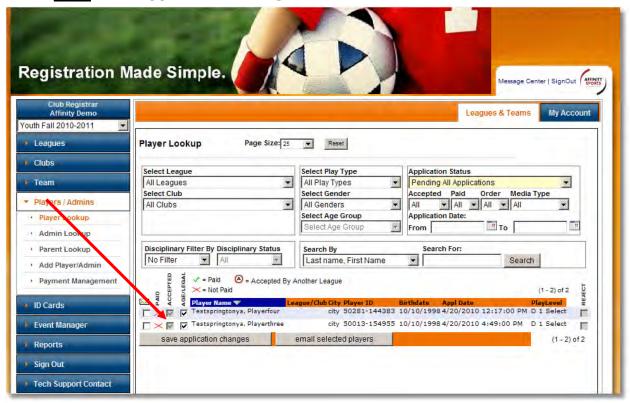


# 2. Clearing Players

Players need to be "cleared" in order to be rostered to a team.

- ✓ Click Player/Admin from the left navigation menu
- ✓ Click Player Look up

- ✓ Search for players by setting the Application Status to Pending All Applications.
- ✓ The search results are displayed with check boxes Accepted & Age Legal. Checking these boxes clears the player and makes them available for rostering.
- ✓ Click Save Application Changes



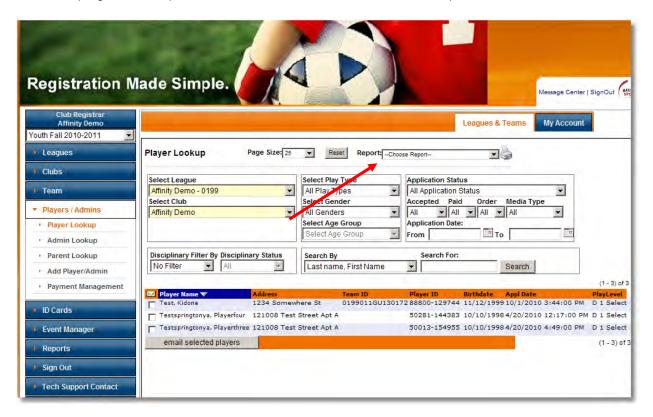
#### Glossary:

- ✓ **Accepted** confirmation that the player will be playing with your club, triggers player to appear in billing reports. One of two steps necessary in order for player to be rostered to a team.
- ✓ **Age Legal** confirmation that the vital data (name, gender, date of birth) entered into the system for the player matches the information on their birth certificate. One of two steps necessary in order for player to be rostered to a team.
- ✓ **Cleared** player has been marked accepted and age legal, grants the ability to roster the player to a team.
- ✓ **Pending** player has an application but is not assigned to a team.
- ✓ Assigned player is rostered and assigned to a team.
- ✓ Activated player is on an activated team.
- ✓ Cancelled player's application has been cancelled.
- ✓ Rejected player's application has been rejected.

- ✓ **Pending Release or Transfer** player's application is pending approved release or transfer.
- ✓ **Approved Release or Transfer** player's application has been approved for release or transfer.
- ✓ **Rejected Release or Transfer** player's applications has been rejected for release or transfer.

## C. Player Reports

Player reports are generated from Player Look-Up search results. Use the drop down filters in player look up to customize the information in the reports.



# 1. Exporting and Printing player reports

- ✓ From Leagues & Teams, click on Players/Admins on the left
- ✓ Click on Player Look up
- ✓ Search for desired players
- ✓ <u>Select</u> a report from the drop down menu located in the player lookup screen
- ✓ Click the printer icon to download the report.
- ✓ Reports:
  - Labels with Team Name
  - o Labels 1 per Household
  - o Player Detail
  - o Application Forms (PDF)
  - o Player Detail with All Fields
  - o All Player Applications Detail
- ✓ Click on the export icon to export the report to the desired format
- ✓ Exportable formats:
  - Adobe Acrobat (PDF)

- o Microsoft Excel 97-2000 (XLS)
- o Microsoft Excel 97-2000 Data Only (XLS)
- o Microsoft Word (RTF)
- o Microsoft Word Editable (RTF)
- o Rich Text Format (RTF)
- ✓ Select the desired format
- ✓ **Click** OK
- ✓ The report will be opened in the format selected, use the settings in the selected program to print the report.

**TIP:** Settings on Acrobat Reader will affect label printing. It is advised that you upload the most current version of Acrobat Reader and delete any previous versions that are on your computer.

## 2. Exporting the Player (or Admin) Detail All Fields report

The Player (Admin) Detail All Fields report is the most commonly used play report as it is the most versatile. This report must be exported into excel where the user can then add or delete columns, filter and sort information as desired.

- ✓ From Leagues & Teams, click on Players/Admins on the left
- ✓ **Click** on Player Look up (Admin look up for the same report on Administrators)
- ✓ Select both a League and a Club from the player look up drop down filters
- ✓ Search for desired players
- ✓ Select the "Player Detail All Fields" (or Admin Detail All Fields if searching for administrators) report from the drop down menu located in the player lookup screen
- ✓ Click the printer icon to download the report.
- ✓ Click on the export icon
- ✓ Select Microsoft Excel 97-2000 Data Only (XLS) from the file format drop down
- ✓ Select All for your page range
- ✓ Click OK
- ✓ **Click** Save, name the report and save to your desktop or documents folder on your computer
- ✓ Open the report and click on column A to highlight the whole column
- ✓ Click Data from the menu at the top of the page
- ✓ Select Text to Columns
- ✓ Uncheck Fixed Width
- ✓ Check Delimited
- ✓ **Click** Next
- ✓ Uncheck Tab
- ✓ Check Comma
- ✓ Click Next

- ✓ **Click** Finish
- ✓ If asked "Do you want to replace the contents of the destination cells?" Click
- ✓ **Click** File from the menu at the top
- ✓ **Click** Save

## You can also place a filter on the columns to more easily utilize the report

- ✓ **Click** on Row 1 so that the whole row is highlighted
- ✓ **Click** Data
- ✓ **Click** Filter
- ✓ Click Auto Filter
- ✓ **Click** File
- ✓ **Click** Save

Columns can now be deleted, added or sorted as needed.

# D. Editing a Player's Information

- ✓ From Leagues & Teams click on Players/Admins from the left navigation menu
- ✓ **Click** on Player Lookup
- ✓ From Player Lookup, search for the desired player(s)
- ✓ **Click** on the **Player Name** to open the players record.
- ✓ Select the tab where you need to add or update information.
- ✓ **Click** Update **Button** save your changes.



There are multiple tabs under the players record that perform different functions and allow different information to be updated.



- o **Player Information** Player name, date of birth,
- o **Preferences** an optional tab used for entering the players preferences
- Applications shows the details of current and historical applications for the player, provides the ability to edit and/or cancel the application
- Transfer shows release/transfer history and provides the ability to perform or initiate a release/transfer
- Parents lists parents/guardians and provides an edit link to open and edit the parent/guardian information
- Disciplinary provides the ability to track disciplinary items on the player

The three main tabs are **Player Information**, **Applications**, and **Transfer** 

## 1. Player Information:

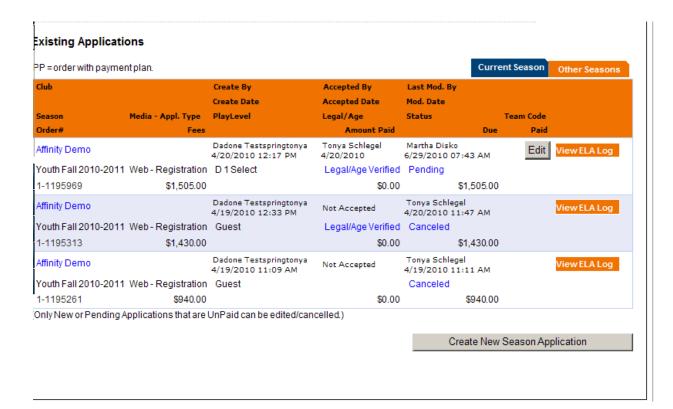
This page is fairly self explanatory you can view and update player details such as school, emergency contact, uniform information, and custom fields information.

**TIP**: For most organizations vital information such as the players name, gender, and date of birth can only be changed by the state association personnel.

## 2. Applications:

The applications tab page shows current and past seasonal history for the player including the following:

- o Club player is registered with
- o Season player is registered for
- Any order number associated with the application or a link to create an order
- How the player was registered (ie. Internally, Web or online, Migration, and Upload)
- o Any fees associated with the application
- o Name of the person who created the application
- Date the application was created
- o Play level of the application
- o If the application has been accepted
- o Name of the person who accepted the application
- o Date the application was accepted
- o If the player is Age Legal (Legal/Age verified)
- o Amount paid
- o Name of the person who last modified the record
- o Date the record was last modified
- o Application status (ie. Pending, Assigned, Activated)
- o Any fees due
- o Team ID number if the player is on a team
- ✓ Click edit to update the play level of the application
- ✓ **Click** cancel to cancel the application
- ✓ Click view ELA log to view/print any Electronic Legal Agreements for the player



## 3. Transfer (Release/Transfer)

The player must be assigned to an activated team in order to begin the release/transfer process. There are two options on the transfer page, the player can be released or transferred. The release/transfer process can be initiated by the parent, coach/admin, or League and club personnel. There are three steps in the approval process of a release/transfer; Releasing Team Administrator (which can be done by the coach/admin, user at the club level, or user at the league level) Releasing League Registrar (which can be done by a user at the League level) and the final approval is the Releasing District Commissioner.

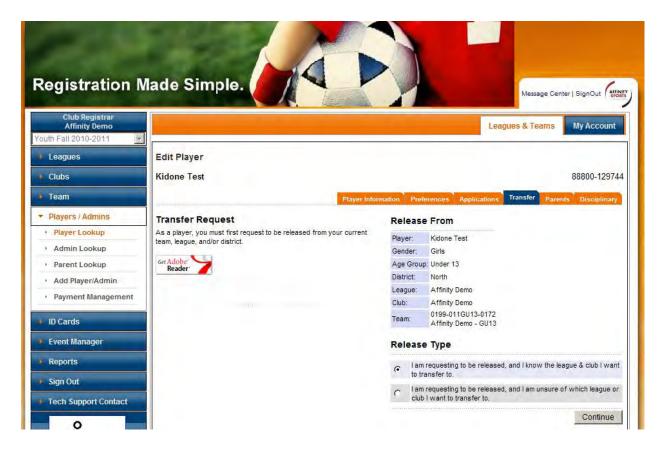
Tip: The user with access to finalize the release/transfer (Releasing District Commissioner step) varies according to the rules of the state association. If you are unsure who has the ability to complete the final approvals please contact your state association.

# Releasing a player

✓ **Click** "I am requesting to be released, and am unsure of which league or club I want to transfer to."

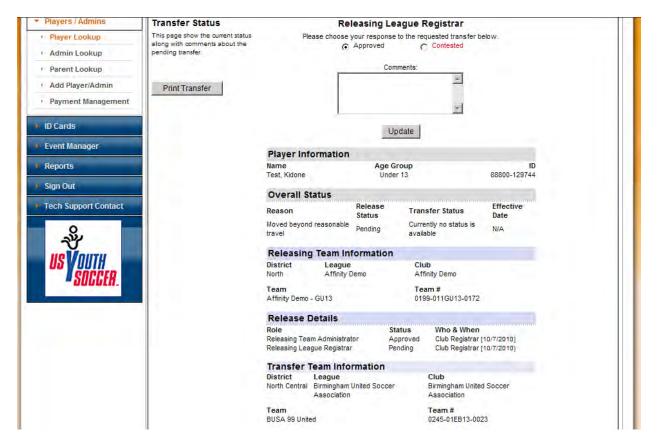
# Transferring a player

✓ **Click** "I am requesting to be released, and I am unsure of which league or club I want to transfer to."



#### For either a release or transfer

- ✓ Fill out the release/transfer form.
- ✓ **Click** Submit
- ✓ Approve as the Releasing Team Administrator (unless this has already been completed)
- ✓ Approve as the Releasing League Registrar
- ✓ Release/Transfer is then in pending until it is approved by the user with access to finalize the release/transfer by completing the Releasing District Commissioner (DC) approval. This user may be at the League, District, or State level, if you are not prompted to complete the DC portion then you do not have the permissions.

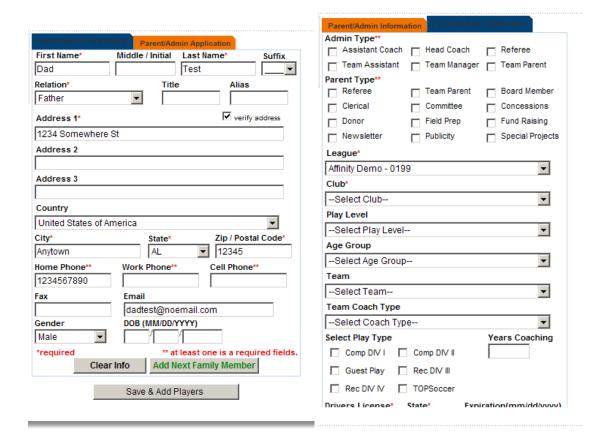


## **VI. Administrators**

# A. Add New Administrators Internally

The first portion of the process described earlier for entering the Parent/coaching information in [Section VII – A] is used to enter information for team administrators.

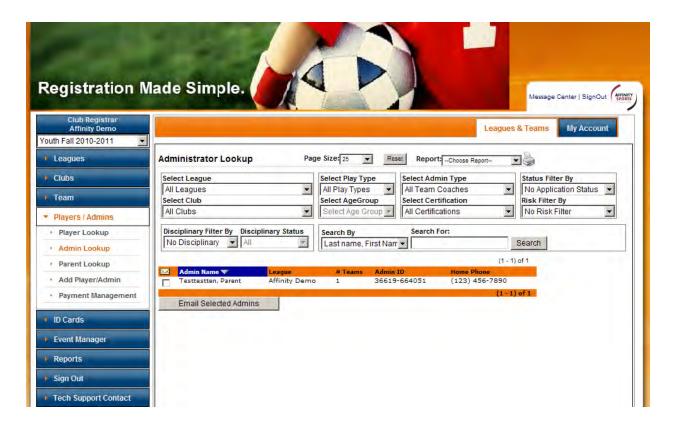
- ✓ From Leagues & Teams, select Player/Admin from the left navigation menu area
- ✓ Click Add Players/Admins
- ✓ Enter the required information on the first screen
- ✓ Click the Additional Information tab and enter required Administrator information.
- ✓ If the administrator has no children to register, Click Save & Don't Add Players Button
- ✓ If the administrator does have children, Click Save & Add Players Button



Tip: See the Players section to learn how to add a player

# **B. Administrator Lookup**

- ✓ **Click** the **Player/Admin Admin Lookup** in the left navigation menu area to perform a search for administrators.
- ✓ Administrator Lookup screen (below), contains drop down menus allowing you to search the database by various search criteria selections criteria
- ✓ Select your search criteria and Click Search Button
- ✓ To edit your Administrator's account information, click his/her name.

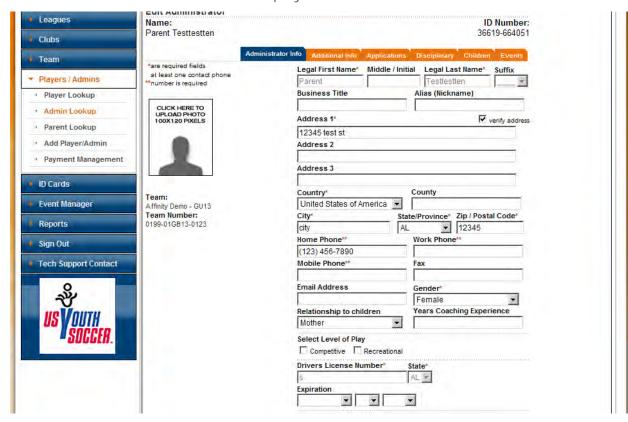


# **C. Editing Administrator Records**

- ✓ From the Administrator Lookup screen Click on the Administrator name
- ✓ Enter any changes to the Administrator's account. Click Update Button

There are several tabs in the Administrator record that provide additional information and functions

- o **Applications tab** will display the Club(s) name, season, status and ELA log
  - ✓ To cancel an Administrator's application, Click Cancel Application Button
- o The **Disciplinary tab** will display any soccer disciplinary sanctions applicable to the Administrator
- o The **Children tab** will list the players linked to the Administrator.



**TIP:** The risk management status and coaching education cannot be modified by the league or the club and can only be done by State Level Administrators.

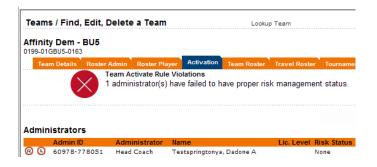
# D. Risk Management / Background Checks / Kidsafe

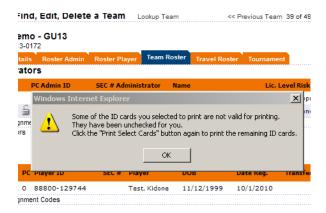
One of the features available on the Affinity Sports system is Risk Management or the ability to manage background check info (also known as kidsafe info) on administrators. We provide the flexibility for this to be as manual or automated a process as is preferred by the association. The system provides all text fields necessary to run automatic background checks and has the capability to return updated results immediately to the administrator record.

- ✓ The system links risk management with registration data and all information is stored in the administrator profile.
- ✓ Based on the security clearance, users will only be able to access the data that they are authorized to view. Additionally all of the vital information is protected and encrypted. Only the following information is displayed to the League Administrator: risk status, risk expire date, risk submit date, and risk return date. All additional risk history and background details are encrypted in tables limited to the security profiles as designated.



✓ The system flags all disqualified administrators and prevents registrars from issuing them credentials. For example, if the Risk Management status is not approved, it will not allow the team to be activated and/or print a card. Additionally, the Administrator lookup includes a risk filter, which allows League Registrar and Risk Management Committee to search by risk status.



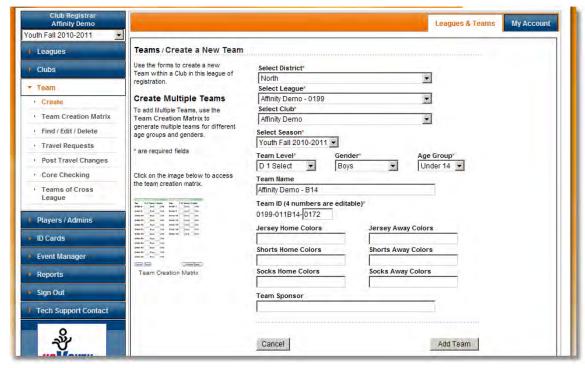


If you have questions regarding risk management please contact your state association or **click** on the Tech Support Contact in the left navigation menu to create a Help Ticket.

## VII. Teams

### A. Create Individual Teams

- ✓ From Leagues & Teams, click Teams from the left navigation menu
- ✓ **Click** Create



✓ From the pull down menus – select District, League, and Club

- ✓ Select Season
- ✓ Select Team Level, Gender and Age
- ✓ Enter Team Name
- ✓ The system will automatically create a Team Number the last four digits of this number are editable.
- ✓ **Click** Add Team

Note: Once a team has been created you can create duplicate teams for the same age group.

## **B.** How to Create Multiple Teams

Create several teams for different age groups at one time.

- ✓ From Leagues & Teams, click Teams from the left navigation menu
- ✓ **Click** Team Creation Matrix
- ✓ Select Club from the drop down menu
- ✓ Select Season from the drop down menu
- ✓ Click Continue Button





Tip: If you do not wish to create teams for a particular play level simply click continue or finish without entering any numeric values for that play level.

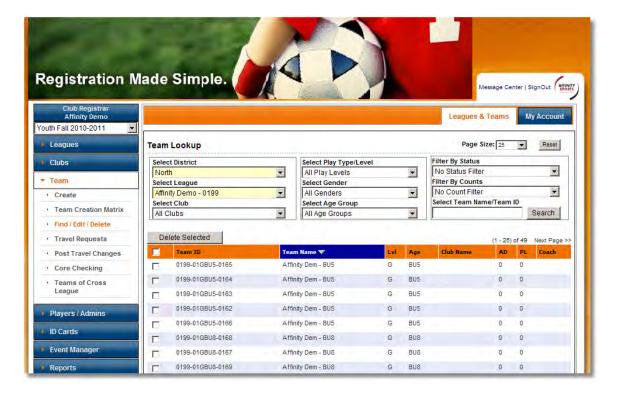
- ✓ System will default to the first available play level
- ✓ Enter number of teams to be created per age group and gender
- ✓ **Click** Continue
- ✓ **Click** Finish when you have entered your information.

**Note**: The system automatically generates a Team ID number for every team created. The ID number helps identify the team in the system and tells us information about the team. This **example: 0167-01CB12-1234** tells us the following:

- District # 01
- League # 67
- Club # 01
- Level of Play C (Competitive)
- Gender B (Boys)
- Age Under 12
- Last four digits are editable

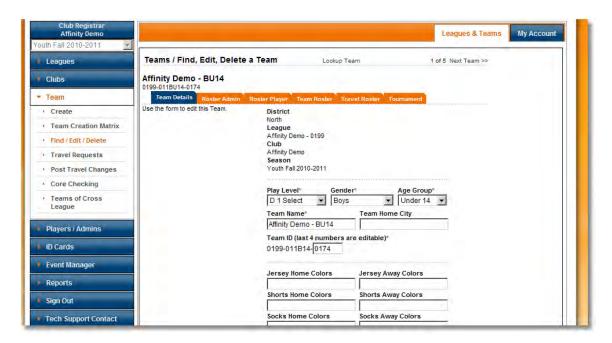
#### C. How Edit a Team

- ✓ From Leagues & Teams, click on Teams from the left navigation menu
- ✓ Select a search criteria from the various pull down menus. (Example: Select a Club All Cubs in Selected League, Play Level, Gender, etc.)
- ✓ Click on the Team Name or any of the column headings to access the team



- ✓ **Click** on the **Team Details** tab to edit the team name, gender, play level, age group etc.
- ✓ **Click** Update **Button** after making changes or additions to save.

TIP: After the team has been activated, the team ID number cannot be changed.



Tip: Please note, state level rules and policies govern your ability to edit teams once activated and or declared for scheduling. If you have questions, please contact the Georgia Soccer administrative offices.

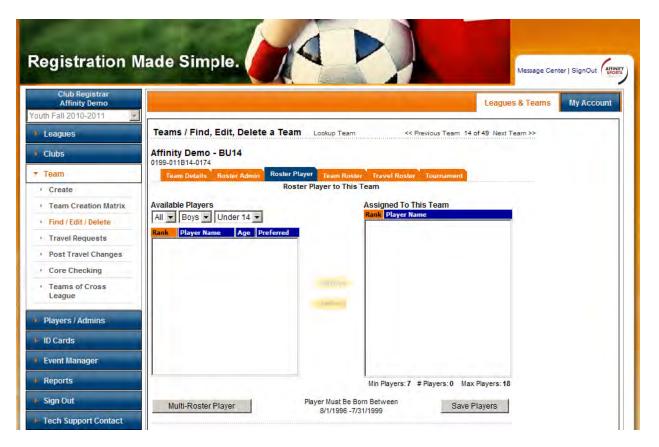
## **D. Rostering Your Players**

Before player(s) can be rostered to a team and a USYSA member pass printed, the League/Club Administrator must validate that all Association requirements have been met and player(s) has been cleared. Once the player(s) has been cleared, use the following process to roster Player(s) to Teams within your League.

- ✓ **Click Teams** from the left navigation menu.
- ✓ Click Find/Edit/Delete under Teams on the left side navigation
- ✓ **Click** on the **Team Name** to access the team
- ✓ **Click** the **Roster Player** tab

Under Roster Player users will have access to two boxes:

- a. **Available Players** (listing of Players that have been cleared and can be assigned to this Team)
- b. Assigned to This Team



- ✓ **Click** on a Player's Name located in the available player's box on the left. If a specific player does appear set the gender and age filters to All.
- ✓ Upon highlighting the player's name, account data will appear in the lower portion of the screen enabling you to verify player information.
- ✓ **Click** the yellow **Add Player** arrow, player will move to the Assigned to This Team box.
- ✓ Continue with the above steps until all players for the Team are listed in the "Assigned to This Team" box.
- ✓ **Click** Save Players to complete rostering.

**TIP:** You can select multiple players to roster by holding the shift key to highlight a group of player's names.

To remove a player that is listed in the Assigned to This Team box

✓ highlight the player's name

✓ Click the remove player arrow.

**Note:** Once the team has been activated (see below), players cannot be removed. It will be necessary to initiate a release and transfer process.

Girls can be rostered onto a boy's team by selecting girl from the gender dropdown box. Also, you may have players that are playing up in age. In this case, they can be found by selecting the Age Group or All from the dropdown menu to get a list of available players.

# **E. Multi Rostering Players**

For those Associations who permit multi rostering of players the Affinity System provides a function to roster players to more than one team.

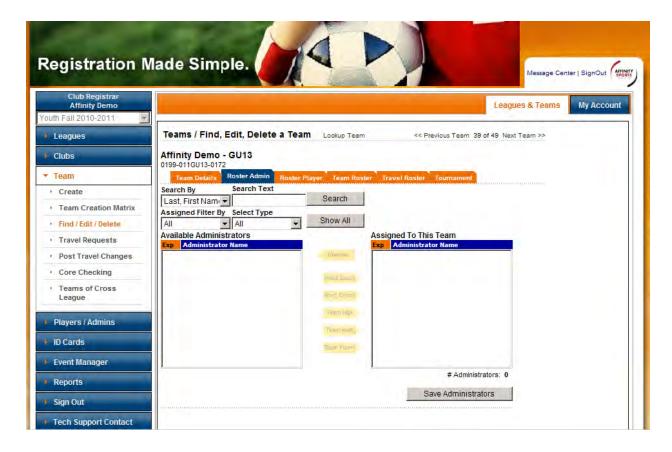
- ✓ From the Roster Player screen, Click on Multi Roster Player. This will open a search window for you to search for player(s).
- ✓ Enter the player's last name and Click Search Button
- ✓ Double Click on the player's name to roster them to the team

**Note:** Multi Rostered players will show up on their primary team with  $\mathbf{\Theta} = Multi$ -Roster Primary Team and  $\mathbf{\Theta} = Multi$ -Roster Alternate Team for the players secondary team.

# **F. Rostering Administrators**

The process for rostering Administrators to teams is similar to that for rostering Players. You will use the same Teams Find/Edit/Delete screen.

- ✓ From Leagues & Teams, click Team from the left navigation menu
- ✓ Search for the desired team
- ✓ **Click** on the Team Name to access the Team tabs.
- ✓ **Click** the Roster Admin tab
- ✓ From the Roster Admin screen you will access two boxes:
  - a. **Available Administrators** (listing of Administrators available to be assigned to this Team)
  - b. **Assigned to This Team** (existing assigned Administrators to this team)



You can search for a specific administrator or view all available administrators.

To search for a specific administrator:

- ✓ Type the first few letters of the Administrators last name in the Search Text box.
- ✓ **Click** Search

To view all available administrators:

✓ **Click** Show All

## Rostering

- ✓ Available administrators will appear in the left hand box. Upon clicking his/her name account data will appear in the lower portion of the screen to verify the individual's information.
- ✓ By <u>clicking</u> the appropriate "role" arrow in the middle of the screen the Administrator will move to the Assigned to This Team box for the administrator role selected.

Role arrows:

Head Coach

Asst. Coach

Team Mgr

Team Asst.

Team Parent

✓ Click Save Administrators to complete rostering.

# **G. Activating Teams**

Once the rostering process has been completed and all administrator licensing and risk management requirements have been met the Team can be activated.

Note: Some state associations are configured to allow only specific person(s) to activate teams, if you do not have the Activation tab the team is either already activated or you do not have the permissions to activate teams. If you are unsure about whether you should be able to activate teams please contact your state association.

- ✓ **Click Teams** from the left side navigation
- ✓ From the **Team Lookup** screen perform a search for the Team that you are ready to activate.
- ✓ **Click** on the Team that you want to Activate.

Tip: Activated teams will appear in the lookup screen with an (A)





The screen below is the Team Activation screen. No Team can be activated until all Association governing rules and by laws have been met. The system will provide a Red [X] when rules have not been met. If the system provides a Green [ ] you can then activate the team by *Clicking* the activate team *Button*.

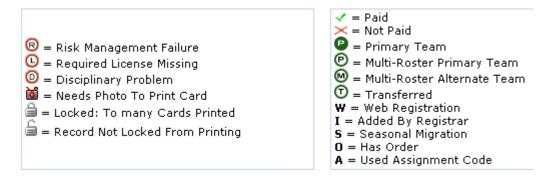
If the team has passed all the activation rules, Click Activate Team.



After a team has been successfully activated the Activation tab no longer appear.



The Team roster screen includes a legend that details various alerts that may appear next to an Administrator or player name.



## **VIII. Member Cards and Passes**

# **A. Printing Your Cards**

Cards (Player and Admin Passes) can be printed from either the Team Roster screen or from ID Cards in the left navigation menu. There are two printing options, the **recommended option is "Print Selected Cards" which uses a program called Mead Co** that you will be prompted to download the first time you print. Mead Co is not compatible with some operating systems and browsers so to use the recommended option you will need to use a PC and the browser Internet Explorer. The second option is called "Print/Preview Selected Cards" and is compatible with MAC.

Tip: All printers operate differently and you may need to adjust your print settings in order for the print to align with your Passes. We recommend that you first print a test page and then proceed with adjusting the settings. Only change the setting in small increments 0.0 to 0.01, etc. Save and then print another test page. When you are satisfied save the final settings. If you use several different printers you will need to do this on each printer.

# 1. Recommended Option: "Print Selected Cards"

✓ From Leagues & Teams, click either Teams or ID Cards from the left navigation menu (for the first time printing teams is recommended)

#### **From Teams**

- ✓ Search for and click on desired activated team (team must be activated to print cards)
- ✓ Click on the Team Roster tab

### **From ID Cards**

✓ Search for desired person(s)

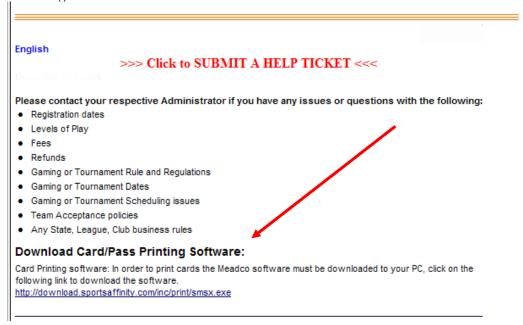
## From either the ID Cards or Team roster pages

- ✓ Select the card to be printed by checking the box to the left of the name(s)
- ✓ **Click** on the **Print Selected Cards** button
- ✓ If you have not printed before you will be prompted to download the printer software Mead Co which will have you update your Active X settings to prompt or enable, make sure you agree to all during the download.
- ✓ Once you have downloaded the printer software the cards will print.
- ✓ When asked if the cards printed correctly click yes if you were printing an actual card on real card stock and it lined up correctly, click no if you did not print on real card stock or were just testing the function

## **Trouble Shooting Tips:**

- ✓ Make sure you are using a PC and the browser Internet Explorer
- ✓ Make sure your pop up blockers are turned off

✓ If you are not prompted to install Mead Co the link can also be located on the Help Ticket page by *clicking* on the Tech Support Contact link in the left hand margin.



✓ If you still experience difficulty see the tip below or contact us by clicking on the Tech Support Contact link in the left hand margin, then create a Help Ticket

Tip: Pop-Up Blocker settings can be accessed under tools on your browser, but any tool bar you download to your browser (ie. google search bar) can have its own pop up blocker settings that are independent of your browser settings. These can all interfere with printing cards. If you are unsure whether or not you have a pop-up blocker installed, one way to test is to go to: <a href="http://www.popuptest.com">http://www.popuptest.com</a> and click on the Multi Pop-Up Test link. The test will open 10 pop-up windows, if all 10 do not open then you may have a pop up blocker installed. Doing a google search for "How to turn off common pop up blockers" can be helpful.

# 2. Secondary Option: "Print/Preview Selected Cards"

✓ From Leagues & Teams, click either Teams or ID Cards on the left (for first time printing teams is recommended)

#### From Teams

- ✓ Search for and click on desired activated team (team must be activated to print cards)
- ✓ Click on the Team Roster tab

#### From ID Cards

✓ Search for desired person(s)

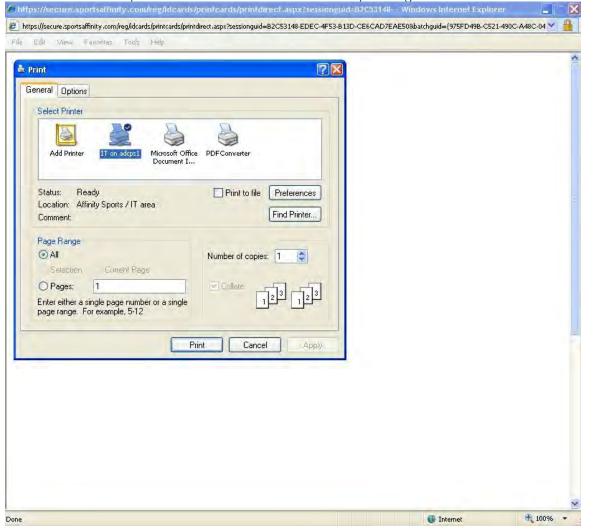
## From either the ID Cards or Team roster pages

✓ Select the card to be printed by checking the box to the left of the name(s) **Players** 



- ✓ Select the "Preview/Print ID Cards" button
- ✓ After selecting the "Preview/Print ID Cards" button you will receive a pop up asking if the card has printed correctly. Do not make a selection on this until after you verify it has or hasn't printed correctly.

✓ The system will have also opened 2 more windows. Your printer general Options as well as the preview of the card selected for printing.



✓ Select to print and verify that the card was printed correctly.

Once the card is printed on plain paper hold it up against the card to make sure it is aligned properly. If the card is properly aligned, you can begin printing your cards. If adjustments are needed, please follow the steps below.

## <u>Adjustment/Alignment Instructions:</u>

First you will need to make adjustments within the system. This is where you will make large adjustments. For fined tuned adjustments you will need to use the print preview on the preview screen, which is shown later in this document.

✓ First go to "Printer Setup"

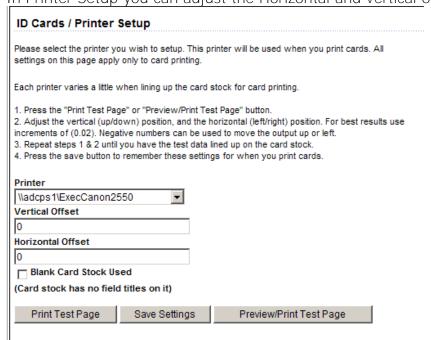


Printer Setup

Under ID cards in the left navigation menu menu.

As a button on the team roster page.

In Printer Setup you can adjust the Horizontal and vertical offset.



To move cards to the left or up further on a page use negatives -. For best results use offsets in the values of either -0.02 or 0.02 and raise the value by 2 each time. Ex. -0.02, -0.04, -0.06, -0.08, -0.10, etc.

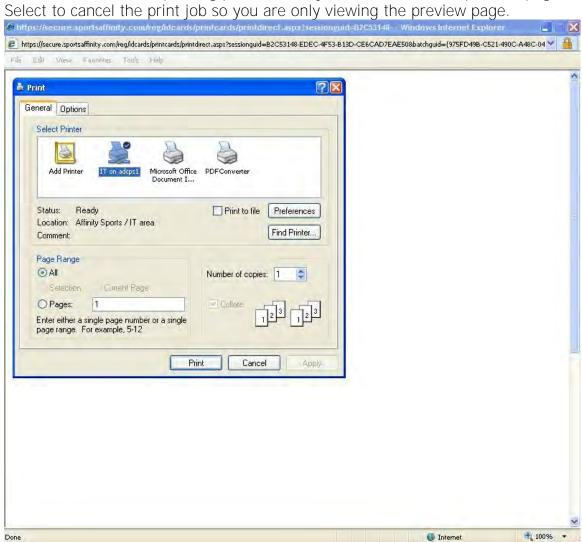
#### Printer Setup

- Adjust the vertical (up/down) position, and the horizontal (left/right) position. For best results
  use increments of (0.02). Negative numbers can be used to move the output up or left.
- 2. Save data. Then press "Preview/Print Test Page" button .
- 3. Repeat steps 1 & 2 until you have the test data lined up on the card stock.

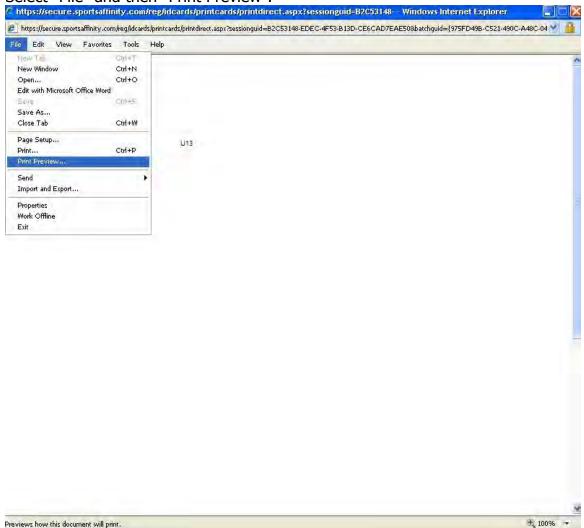


- ✓ Save your settings.
- ✓ Attempt to reprint your card using your changes.
- ✓ If more fine tuned adjustments are needed please follow the below steps.

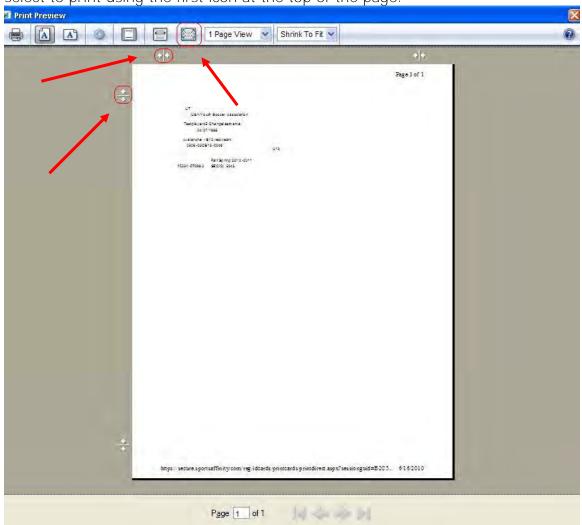
✓ Proceed with the card printing process until you are taken to the preview page. Select to cancel the print job so you are only viewing the preview page.



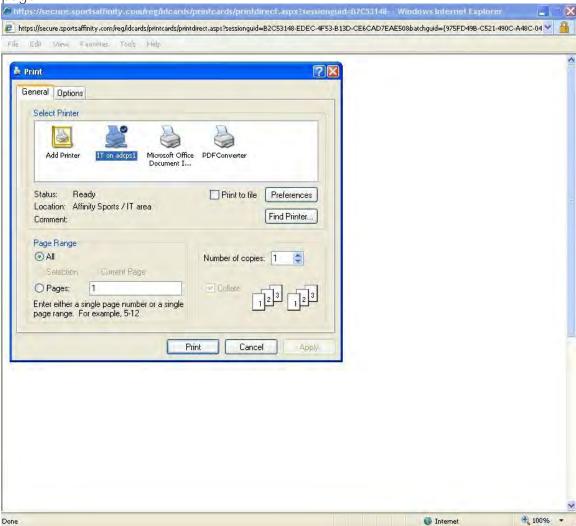
✓ Select "File" and then "Print Preview".



✓ You will now be taken to the print preview page. If not already on view full page select the "View Full Page (Alt+1)" button at the top. You will have adjustable margin sliders on the top of the page and the left side of the page the controls the vertical and horizontal placement. Once you make your changes, you can select to print using the first icon at the top of the page.



✓ Selecting print will take you back to the general print page.

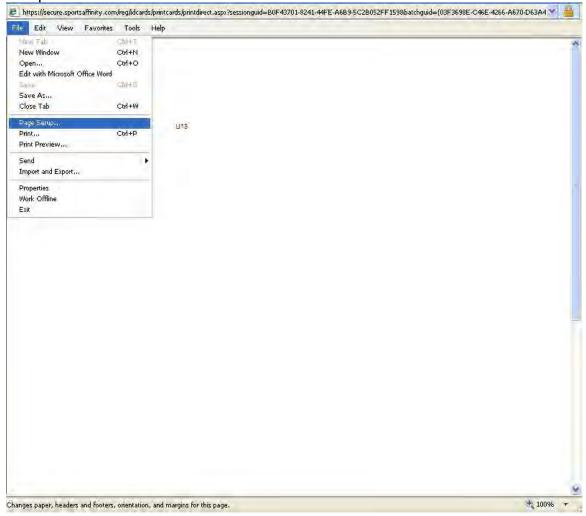


✓ Print cards and verify cards printed correctly.

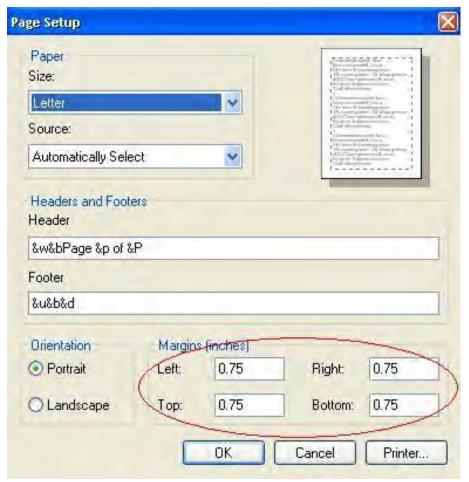
## Page Setup

An alternative to using the margin sliders is to adjust the margins in inches through Page Setup.

✓ Select "File" while on the preview page. Then select "Page Setup".



After selecting "Page Setup" a window will open displaying the following.



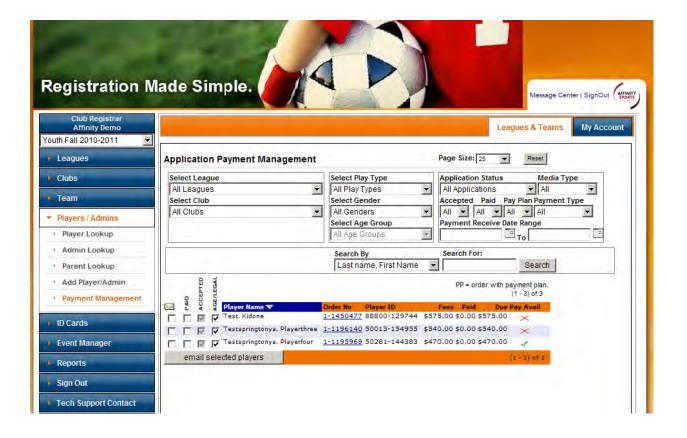
You can make minor as well as large scale adjusts. For best results please go in increments of 0.05. Ex. 0.75 to 0.80, 0.85, etc. There is no need to use negative in this area as there are margins for top, bottom, left, and right.

The "Page Setup" can also be accessed from within the Print Preview, by **clicking** on the "Page Setup (Alt+U)" button.

✓ After making adjustments select "OK" to save changes and then select to print.

# IX. Payment Management

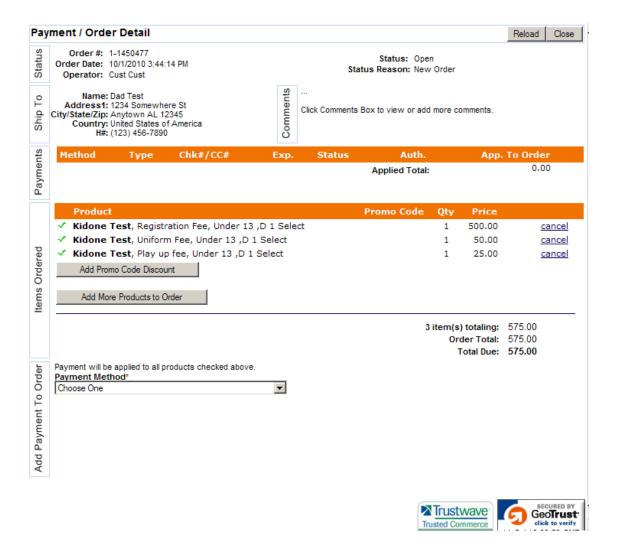
The payment management area allows the user to easily track the applications that contain payments.



Tip: Only players with orders created will show up in payment management.

In the Order No column the order number will be listed as a link, by **clicking** on the order number the user will be able to open and edit the order.

League users will be able to capture, update, or refund payments as well as enter discounts, scholarships, or comments.



The Pay Avail column will display either a red  $x^{\times}$  , a green check  $\checkmark$  , or be blank.

The red x indicates that there is a problem with the payment (ie. no payment has been entered or if paying by credit card or e-check that the payment has been declined).

The green check indicates that there are funds waiting to be captured.

If the pay avail column is blank the funds have been received and the player is paid.

Tip: Credit Cards will not be charged until the player has been marked accepted. Once the player has been marked accepted the system will automatically charge their card or "capture" the payment.

The following process is the most basic recommended process for those organizations that use the Affinity System to take Credit Card and or e-check and manual payments. Keep in mind that you can narrow or broaden any search with the use of date ranges

and other search filter drop downs than described below. If you need additional assistance with payment management please **click** on the Tech Support Contact link in the left navigation menu and create a Help Ticket.

- ✓ From Leagues & Teams, click on Players / Admins
- ✓ **Click** on Payment Management

## **For Credit Card Payments**

- ✓ Set the Payment Type filter to Credit Card
- ✓ Click Search
- ✓ Check the Accepted boxes for all players with a green check mark in the pay avail column (this will automatically charge their cards)
- ✓ Investigate and follow up with any players that have a red x in the pay avail column (click on the order number to view the order, you can also email the players (parents) by clicking on the check boxes under the envelope icon)

## For Check, Cashiers Check, Money order and Cash payments

- ✓ Set the Payment Type filter to Check/Money order
- ✓ **Click** Search
- ✓ **Click** on the order numbers for the players that you have received manual payments for
- ✓ Once the order is open either **click** capture or enter the payment received
- ✓ Mark the players whose manual payments have been received as accepted
- ✓ Investigate and follow up with any players that have a red x in the pay avail column

## For e-check payments

- ✓ Set the Payment Type filter to e-check
- ✓ Once the pay avail column is blank mark the players accepted (it takes 7-10 business days for an e-check to clear)

# X. Reports

# A. Reports Navigation

The Affinity System groups valuable information according to **Leagues, Teams, Players** and **Administrators**. In each of these categories you can select the data you wish to view on screen, or access numerous reports. You may print the **Reports**, or export them in common formats that can be imported into such programs as Excel and Word.



# **B.** Accessing Reports

✓ **Click Reports** in the left navigation menu

The following Report categories are available:

- Registrations:
  - **Team Report:** Team rosters, uniform reports, admin by team
  - **Financial Report:** credit card and non credit card detail payment detail reports, transaction detail reports
  - Counts Report: Billing reports
  - Player Report\*: Takes user to Player Look up screen
  - Administrator Report\*: Takes user to Admin Look up screen
  - Misc Reports
- Events:
- New Financial Reports\*\*: Remittance Reports, credit card and non credit card payment detail reports, transaction detail reports
- o **New Reports (Beta)\*\*:** Additional reports in the newer format \*See the Player and Admin look up sections for information on these reports \*\*We are in the process of moving from a crystal reports based reporting system to an ssrs based reporting system. New reports are in ssrs and will be found under new financial reports or new reports as they are made available. Both versions will be accessible until the all reports are available in the new format.
- ✓ Select the desired report category and sub category
- ✓ Select the desired search criteria
- ✓ Click generate report
- ✓ The report will open in a new window and can then be printed or exported.

When you generate a report, the format will include a tree structure on the left-hand side of the report page. This tree structure allows you to expand the tree by **clicking** on the [+] and go directly to a team, zip code, etc. You can close the tree by **clicking** the tree icon at the top left hand side of the report. Once the tree is closed the report will left justify.

Shown below is the tool bar that appears at the top of the reports



#### The main icons are:



# **C. Printing/Exporting Your Reports**

## 1. Print your report

- ✓ Click on the small printer icon on the top left edge of the screen
- ✓ Click on the page number to print (usually select ALL) and
- ✓ **Click** the Print **Button**
- ✓ Another page will open, select all or a specific page from the page range options
- ✓ **Click** Ok
- ✓ **Click** Open to open up the report in Acrobat or **Click** save and save to your desktop.
- ✓ You can then print the report in Acrobat

**Note:** Printing is done from the report window using the print icon on not from your Browser Tool Bar

# 2. Export your report

- ✓ Open desired report
- ✓ **Click** on the small export icon to the left of the printer icon at the top of the report
- ✓ A screen will appear requesting the export file type; presently the available file export types include: Crystal Reports, Acrobat, Word,
- ✓ Excel, and Rich Text Format; select the desired file type
- ✓ Select the page(s) to export and Click Export
- ✓ A file will be created that can either be stored on your computer or opened in the appropriate software program

## 3. Reformatting a Comma Delimited Report

- ✓ Open desired report
- ✓ **Click** on the small export icon to the left of the printer icon at the top of the report
- ✓ Select Microsoft Excel 97-2000 Data Only (XLS) from the file format drop down
- ✓ Select All for your page range
- ✓ **Click** OK
- ✓ **Click** Save, name the report and save to your desktop or documents folder on your computer
- ✓ Open the report and click on column A to highlight the whole column
- ✓ Click Data from the menu at the top of the page
- ✓ Select Text to Columns
- ✓ Uncheck Fixed Width
- ✓ Check Delimited
- ✓ **Click** Next
- ✓ Uncheck Tab
- ✓ Check Comma
- ✓ **Click** Next
- ✓ **Click** Finish
- ✓ **Click** File from the menu at the top
- ✓ Click Save

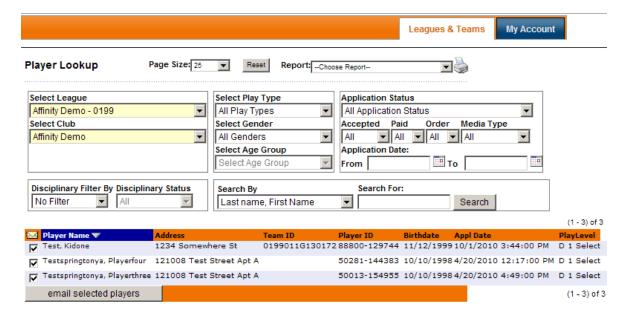
# You can also place a filter on the columns to more easily utilize the report

- ✓ **Click** on Row 1 so that the whole row is highlighted
- ✓ **Click** Data
- ✓ *Click* Filter
- ✓ **Click** Auto Filter
- ✓ **Click** File
- ✓ Click Save

Columns can now be deleted, added or sorted as needed.

# XI. Email Broadcasting

The ability to email your membership is available in the **player, administrator, parent and payment management lookup functions**. Additionally emails can be set from the **Team Roster** screens. When you perform a lookup for a particular subset of your members, you will notice an icon in the shape of an envelope at the top far left of the search results and a column under this icon next to each name. This is the icon for broadcasting emails.



# A. Email by Team

- ✓ From Leagues & Teams, click on Team from the left navigation menu
- $\checkmark$  Search for and **click** on the desired team
- ✓ Click on the Team Roster tab
- ✓ **Click** on the envelope icon to select all players and administrators for the team or check just the individuals you wish to email
- ✓ **Click** the Email Selected button

You will be taken to a content editor screen where you can compose your email

# **B. Email Players and Administrators**

✓ From Leagues & Teams, click on Players / Admins from the left navigation menu

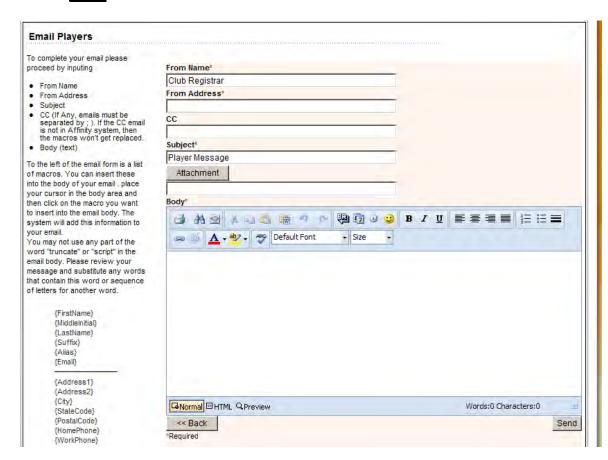
- ✓ Click either Player Look up, Admin look up, or Payment Management
- ✓ Search for desired persons
- ✓ **Click** on the envelope icon to select all names or check specific individuals
- ✓ **Click** the Email Selected button

You will be taken to a content editor screen where you can compose your email

### C. Email Content Editor

Once you have selected the persons you wish to email you will be taken to an email content editor. This editor will allow the user to create a basic email with various font size, type and color and some other basic features. The user is also able to cc additional individuals and upload an attachment.

- ✓ See email by team or email players and administrators above to reach the content editor
- ✓ Enter the From Name, From Address and Subject (\*users may also enter a cc email and/or upload an attachment if they wish)
- ✓ Using the content editor create the desired message (macros are listed to the left of the email body for easy personalization)
- ✓ **Click** Send



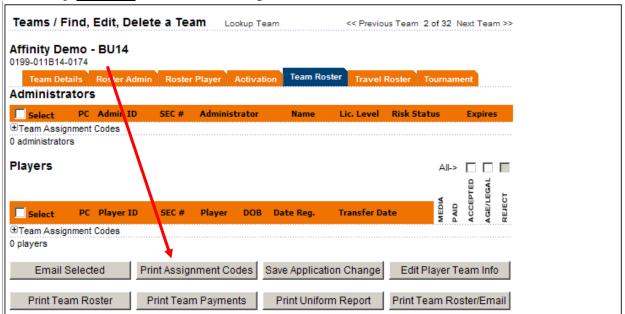
# **XII. Additional Features**

# A. Assignment Codes:

Assignment Codes are used to place players and/or administrators directly on a team during the online registration process. The system creates a list of assignment codes by default for each team created. Assignment codes are an optional feature available to the club to help simplify the team rostering process.

Note: To be used Team Assignment codes must be 'turned on' (set to show or required) under Registration/Fields.

- ✓ The teams must be created first.
- ✓ The system automatically creates the assignment codes when the team is created. Each team has their own unique assignment codes.
- ✓ The assignment codes are listed on the team roster page and can be accessed by clicking on the Print Assignment Codes button.



- ✓ The registrar and any administrator assigned to the team has access to the assignment codes
- ✓ The registrar can provide the assignment codes to the team administrators and
  players or can assign the administrators to the teams and allow the
  administrators to provide the assignment codes to the players
- ✓ The player enters the assignment code when prompted during online registration and is immediately placed on the corresponding team



### Very Important

- ✓ Do not confuse Team ID numbers with Assignment Codes
  - The Team ID number identifies your team in the system and ends in four numbers
  - Assignment Codes place players and administrators on the corresponding team and end in two letters and two numbers

9044-57531-HC01 (Head Coach)
9044-57531-AC02 (Assistant Coach)
8544-57531-TM03 (Team Manager)

Player Assignment Codes
4644-57531-PL01
1044-57531-PL02

Administrator Assignment Codes

Tip: Assignment codes are 15 digits including the letters and dashes.

7444-57531-PL03

## Assignment Codes for Administrators look like this:

0000-00000-HC00 (assignment code for Head Coach)

0000-00000-TM00 (assignment code for Team Manager)

0000-00000-AC00 (assignment code for Assistant Coach)

Assignment codes for players look like this:

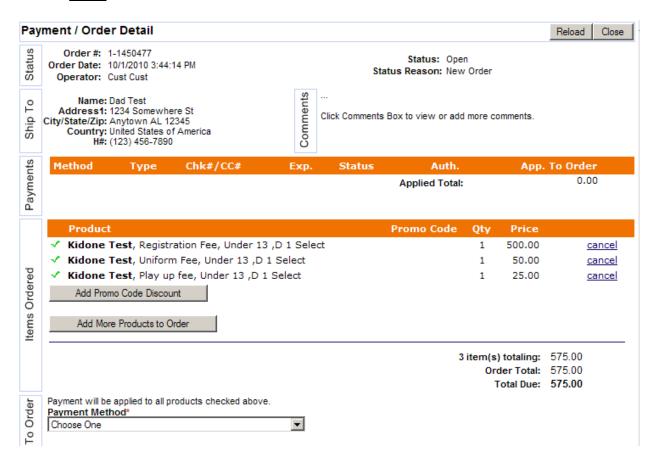
0000-00000-PL00

Always enter the dashes and capitalize the letters on assignment codes, they must be entered exactly as they appear.

The Head Coach code and Player codes can be used only once. The Team Manager and Assistant Coach codes can be used multiple times.

## **B. Add New Product to Order**

- ✓ From Leagues & Teams, click on Players / Admins from the left navigation menu
- ✓ Click on payment management
- ✓ Search for desired player
- ✓ Click on the players order number to open the order
- ✓ Click on the Add More Products to Order button



Select any pre-created fee (option 1)

- ✓ Check the desired fee
- ✓ **Click** Add Selected Products to the Order
- ✓ Click Close & Refresh Order/Payment Page button

Create a new fee (option 2)

- ✓ Enter an item description
- ✓ Enter an item price
- ✓ Select the player the item applies to
- ✓ Click the Create and Add Item to the Order button
- ✓ Click the Close & Refresh Order/Payment Page

Option 1: select pre-config fees/products and add to the order:
☐ Kidone Test 2nd Sibling Discount, Under 13 ,D 1 Select \$-10.00
☐ Kidone Test 3rd Sibling Discount, Under 13 ,D 1 Select \$-10.00
☐ Kidone Test 4th Sibling Discount, Under 13 ,D 1 Select \$-5.00
☐ Kidone Test 5th Sibling Discount, Under 13 ,D 1 Select \$-5.00
Add Selected Products to the Order
Close & Refresh Order/Payment Page
Option 2: Create your own order Item with price and add to the orde
Item Description:
Item Price: \$
Add item to selected Player(s):*  Kidone Test
Create and Add Item to the Order
Close & Refresh Order/Payment Page

# C. Age Group Coordinator Role

\* -- required

The Age Group Coordinator Role has been implemented in the Affinity System to allow Age Group Coordinators to have access to the system to create teams and roster players to teams, without giving access to other critical areas and information within the system. The idea behind this role is to provide a user with a limited view of specified age groups and only those age groups.

The configuration for this role is located at the League & Club level in the League or Club Configurations.



## **Creating an Age Group Coordinator**

- ✓ From Leagues & Teams, click Leagues in the left navigation menu
- ✓ **Click** Security
- ✓ Select the User Type of "Age Group Coordinator" from the dropdown at the top of the screen and fill out the blank form. This user will then show up under the Age Coordinator tab for age group assignment. Existing Users can be updated or new Users created
- ✓ After entering the information for the User a permission level needs to be selected
- ✓ Save changes and select the Age Coordinator button at the top of the page

Tip: The basic permission levels available are League Registrar, League Registrar no card printing, League Registrar Assistant and League Board Member. Since the idea behind the Age Group Coordinator Role is to limit the users access you ideally would not want to provide them with full access (league registrar). Medium level access such as League Registrar Assistant or League Registrar no card printing is ideal.



You will now be taken to the age group coordinator age group selection page. You will see all Play Types in created in the system. The age groups shown are based off team ages. This allows the user to access teams within the age group that they have assigned to them and still allows them to roster players that may be playing up. The roster player tab will still show all age groups available to be rostered to this team.

✓ Once the coordinator has been selected, select the age groups that you want to be assigned to the coordinator by placing a check in the desired age groups. ✓ Once you have made your selections, select update and you will have successfully created an age group coordinator role.

Note: Giving someone access to all age groups is available though if you are providing access to all age groups there is no need to make them an age group coordinator, the normal league registrar role will work for that purpose.

# XIII. Glossary

By necessity, there are a number of terms that are used to define the various actions and status of players and administrators within the registration process. These terms are defined below:

**Leagues: 'Corporate parent' of the club**, same as a Club for most organizations

**Accepted**: Confirming that the player will be playing with your club, acceptance triggers the player to appear in billing reports. Acceptance is one of two steps necessary in order for player to be rostered to a team.

**Age Legal**: Confirming that the vital data (name, gender, date of birth) entered into the system for the player matches the information on their birth certificate. Age Legal is one of two steps necessary in order for player to be rostered to a team.

**Cleared**: Indicates the player has been marked accepted and age legal, clearing the player grants the ability to roster the player to a team.

**Application Status**: the status of a player within the registration process; each time a player is entered into SAO either through online registration, registrar entry, or seasonal migration, an electronic application is created to this player. The application status of players is categorized as:

**Pending** – player has an application but is not assigned to a team.

**Assigned** - player is rostered and assigned to a team.

**Activated** - player is on an activated team.

**Cancelled** - player's application has been cancelled.

**Rejected** - player's application has been rejected.

**Pending Release or Transfer** - player's application is pending approved release or transfer.

**Approved Release or Transfer** - player's application has been approved for release or transfer.

**Rejected Release or Transfer** - player's applications has been rejected for release or transfer.

**Show on Public Registration -** means that if a user comes to your website to register, they will be able to complete a registration. If you are not ready to turn this function on and allow users to register keep this option selected to "No"

**Automatically Accept Registration -** will automatically accept the users application once it has been submitted. **It is recommended that this is selected to "No" as once a** player has been accepted only UYSA state office or Affinity Tech support can un-accept a player.

**Capture:** To charge a credit card or mark a manual payment as paid.

**Manual Payment:** Any payment type that is not a credit card or e-check (check, cashiers check, money order, scholarship etc.)

**Player Release**: the process of releasing a player from an activated team; accomplished through the requirements as set forth in the Soccer Association Rules; until a player is transferred to another activated team, said player shall remain in the District pool of the District where the player was rostered.

**Player Release and Transfer**: The process of transferring a player from one activated team to another activated team which is accomplished through the requirements set forth in the Soccer Association Rules.

**Risk Management Status**: the current status of an administrator's risk management clearance.

- **Approved or Eligible**: no negative report record received from the back ground checking company or Criminal Justice Department.
- **Sent**: risk management has been sent for processing but a report has not yet been received.
- **Failed or Ineligible**: a report has been received with negative information. Administrator is labeled failed or ineligible. This can only be overridden by the State Risk Management. Cannot be rostered to a team.
- **None**: administrator has not undergone risk management processing.
- **Sent to State Association:** administrator has provided all necessary risk management paperwork and such paperwork is awaiting transmission to the background checking company or Criminal Department of Justice.

**Media Type:** a search filter on the Player Lookup function that provides information of the method by which a player was entered into a League's registration.

- Web: player registration was received via online parental registration
- **System**: player registration was received via migration from one season to another
- Internal: player registration was entered directly by a league

registrar

**Team Activation:** the process of completing the player and administrator rostering to a team; accomplished by *Clicking* the activation tab on the Team page subject to the meeting of Soccer Association's rostering business rules; member passes can only be printed for an activated team.