

Updated 6/22/2011

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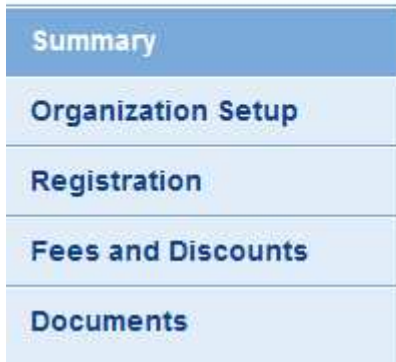
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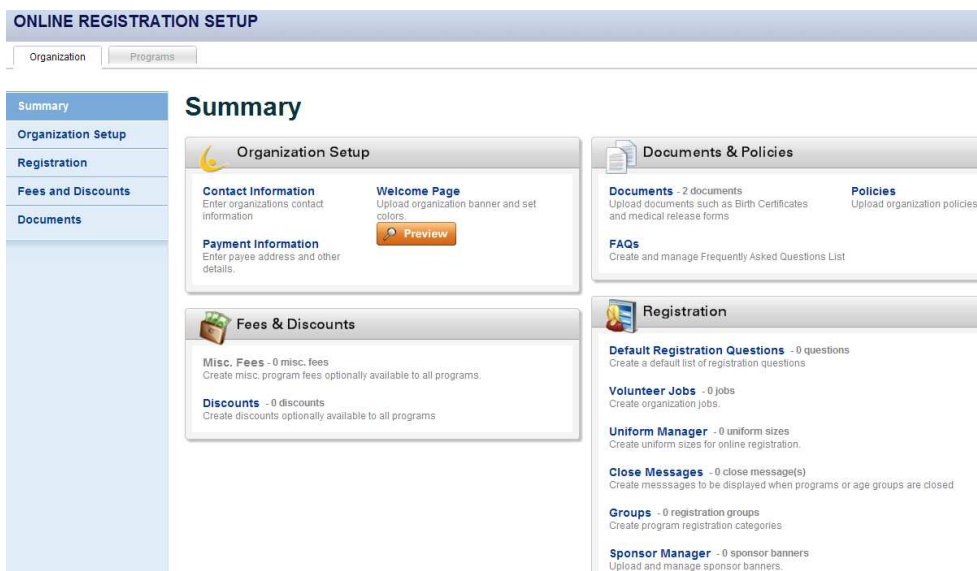
## Organization



The Organization tab allows you to control the settings related to your organization that will be used by throughout registration by your programs. It consists of five sub-categories: Summary, Organization Setup, Registration, Fees and Discounts, and Documents.

### Summary

The Summary page will link you to any of the tools located within Organization.



## Organization Setup

**Contact Info** – This tool allows you to change your club’s contact information, including address, phone number, and email address.

ONLINE REGISTRATION SETUP

Organization Programs

**Summary**

**Organization Setup**

Contact Info


Welcome Page

Payment Info

**Registration**

**Fees and Discounts**

**Documents**

 **Contact Information**  
Manage your organization’s address and contact information for registrations.

**Organization Address**

The information provided here will appear on the registrant’s receipts. Please be aware when providing any personal information.

Enter mailing address and website address below.

\* Address 1

Address 2

\* City

\* State

\* Zip Code

\* Country

Website

**Organization Contact**

Define organization contact information.

\* Contact Name

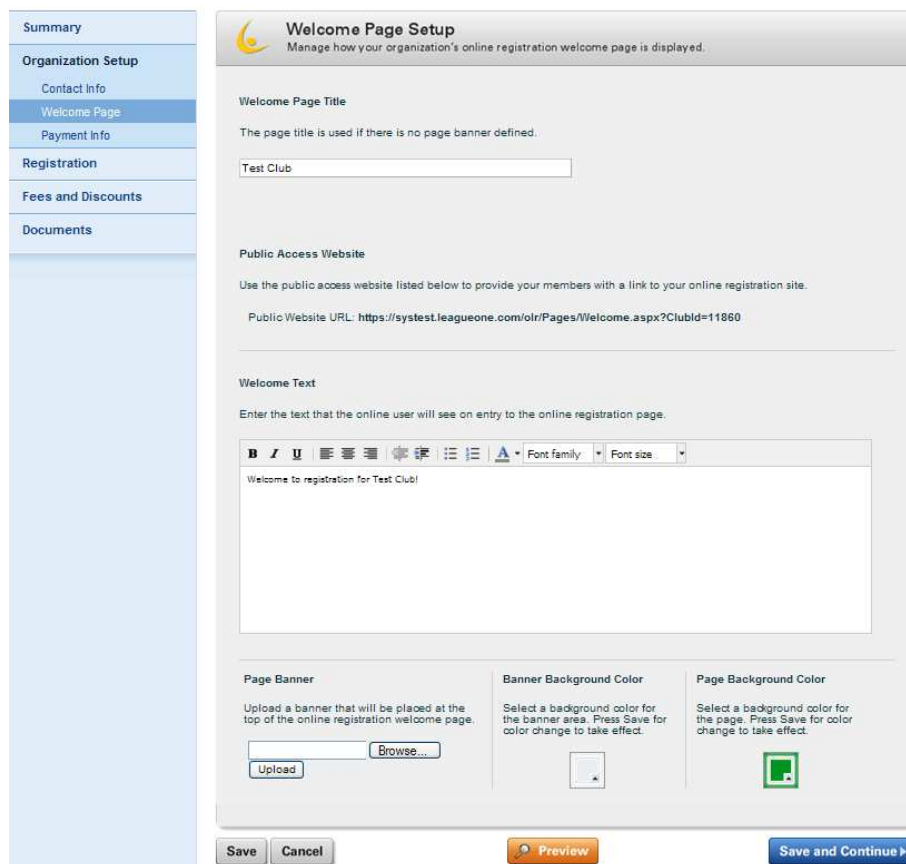
\* Email

If this is a valid email, registration receipt emails are sent using this as the From email address.

\* Phone

Fax

**Welcome Page** – This tool allows you to customize your welcome page, which is the first page parents see when logging in to register for a program. You can specify a title for your welcome page, enter text that will display on the welcome page, add a banner/logo, and set a color scheme for the page. As with any page in self-setup, any changes will need to be saved in order to be permanent. You can preview the way your welcome page appears at any time by clicking the “Preview” button. When you are ready to link registration to your website, you may access your Public Website URL from this page.



**Payment Info** - This tool is not currently available for self-setup. To change your remittance information for the checks that Active your organization, please contact an Active Support representative for assistance

- Summary
- Organization Setup
  - Contact Info
  - Welcome Page
  - Payment Info
- Registration
- Fees and Discounts
- Documents

### Payment Information

Define payment address and contact here.

#### Payment Address & Contact Person

Enter payment contact information

\* Contact person

\* Address

\* City

\* Country

\* State

\* Zip Code

#### Payment Remittance Information

Enter payment information such as payee name, description that appears on the online registrants credit card statement, etc.

\* Pay To

\* Card Statement Description

Federal Tax ID

\* Currency

## Registration

**Default Questions** – This tool allows you to configure sets of answer options that can be used by your registration questions when associating questions to a program. This is not where you actually apply registration questions to your forms, but simply where you build your answer sets for your questions. This tool should be used any time you would like to build a dropdown menu or radio buttons for a registration question.

To create a new set of answer options, click “New.” To edit an existing set, click “Edit.” To delete a set, click “Delete.”

A new window will open on your screen to guide you through how to create or manage a set of answer options. You will want to name your answer set so that it is recognizable at a later time when associating it to a question used by a program. You may also enter a more detailed description of the answer set for reference purposes.

Click “Add Option” to specify what answer choices will appear in a dropdown menu or as radio buttons for the question these answers are related to. Your ‘Display Value’ will be what the registrant sees in online registration. Your ‘Saved Value’ will be what appears in a registration report for this particular selection. It can be the same as your ‘Display Value’ or an abbreviated version.

You can apply these answer options to questions when configuring your programs. The bottom of this window shows which programs are using this set of answer options on their online forms.

**New Default Question**

**Question Details**

Enter question name and question to be displayed on online registration form

\* Name:

\* Question:

---

**Default Questions**

Create and manage a default list of questions that can be used in any program

+ Add Option ▲ ▼

Display Value	Saved Value	
1st Grade	1st	<a href="#">Edit</a> <a href="#">Delete</a>
* <input type="text" value="2nd Grade"/>	* <input type="text" value="2nd"/>	<a href="#">Accept</a> <a href="#">Cancel</a>

---

**Programs using this question**

Below is a list of all programs using the question in the online registration form

Session	Program	Division	Active

**Volunteer Jobs** - This tool allows you to add or edit volunteer options. To add a volunteer option, select “Add Job.” Enter the volunteer name and description, check “Active” and select “Accept.” If you do not check “Active” the option will not display during registration.

To remove a job temporarily, select “Edit” next to an existing job and uncheck the “Active” box. To delete a job, select “Delete.”

Organization Programs

**Summary**

**Organization Setup**

**Registration**

- Default Questions
- Volunteer Jobs
- Uniform Manager
- Close Messages
- Groups
- Sponsor Manager

**Fees and Discounts**

**Documents**

**Volunteer Jobs**  
Create and manage your organizations default list of volunteer jobs.

**Volunteer Jobs**  
Use this area to create and manage your organizations default list of volunteer jobs.

+ Add Job

Name	Description	Active	
		<input type="checkbox"/>	Accept Cancel

Save Cancel

**Uniform Manager** - This tool is not currently available for self-setup. To change a uniform bundle (including sizes offered or prices charged), please contact an Active Support representative for assistance.

**Close Messages** - This tool is not currently available for self-setup. To change what message appears to those who attempt to register after registration has closed, please contact an Active Support representative for assistance.

**Groups** - This tool allows you to add or update a set of groups that programs are associated to within your catalog. Groups will help organize the registration page if you have multiple programs.

To group your programs, first check the “Group Programs” box. Next, select “New” to add a group or “Edit” to edit an existing group.

**Summary**

**Organization Setup**

**Registration**

- Default Questions
- Volunteer Jobs
- Uniform Manager
- Close Messages
- Groups
- Sponsor Manager

**Fees and Discounts**

**Documents**

**Group Manager**  
Manage activity catalog grouping for programs.

**Group Programs**  
Check this box to display programs in groups on the Online Registration Catalog. If the group programs box is not checked, by default

Group Programs

**Group Manager**  
Manage activity catalog grouping for programs.  
To add a program to a group, please go to the 'Catalog' page under the 'Program' tab.

+ New Edit Delete

Name	Group Description	# Programs Using
Test	Test	0

Save Cancel

**Sponsor Manager** - This tool allows you to add a sponsor image to your registration receipt page. You will be able to apply this image when you build your programs.

The table lists all sponsor banners that have been added for your organization and shows how many programs each document has been applied to. To edit an existing sponsor, click the "Edit" button next to the sponsor.



The screenshot shows the 'Sponsor Manager' interface. On the left is a navigation menu with categories: Summary, Organization Setup, and Registration. Under Registration, there are links for Default Questions, Volunteer Jobs, Uniform Manager, Close Messages, Groups, and Sponsor Manager (which is highlighted). The main content area is titled 'Sponsor Manager' and includes a sub-header 'Sponsor Banner'. Below this, there are instructions: 'Manage your sponsor banners here.' and 'To apply any of the sponsor messages to a program please go to the 'Sponsor' page which is located on the 'Programs' tab under...'. There are three buttons: '+ New', 'Edit', and 'Remove'. At the bottom, a table header is visible with columns: Name, Sponsor Image URL, Width, Height, Active, and # Programs Using.

## Fees and Discounts

This tool is not currently available for self-setup. To change your family discount or add a miscellaneous fee, please contact an Active Support representative for assistance.

\*Fees/discounts such as registration fees, early bird discounts, and late registration fees are set within individual programs. You **do** have the ability to adjust these!

## Documents

Use this tool to manage your organization's documents and policies.

**Document Manager** – Create and manage documents that are needed from participants following registration. These documents may be applied when building programs.

Document Delivery allows you to specify whether documents can be submitted via mail, email, or fax.

The table lists all documents that have been added for your organization and shows how many programs each document has been applied to. To edit an existing document, click the "Edit" button next to the document.

To add a new document, click the "Add Document" button. A new line will appear that requires you to name the document as well as provide a description for it. If a copy of the document is hosted somewhere on the internet, you may provide the URL for the document so that parents may access it through their receipt.



**Document Manager**  
Create and manage documents used during Program document workflow.

**Document Delivery**

When documents are presented on the Online registration form, allow document delivery using the following methods:

By Email    By Mail    By Fax

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**Documents**

Use this area to create and manage your organizations default list of documents. If you require a custom document with form merge fields, contact LeagueOne Professional Services.

[+ Add Document](#)

Name	Description	URL	Form Merge	# Programs Using
Birth Certificate	All new players must submit a copy ...		No	1 <a href="#">Edit</a>
Test Form	this form might be required for reg...		No	3 <a href="#">Edit</a>
<input type="text" value="Medical Waiver"/>	<input type="text" value="A signed medical waiver t"/>	<input type="text" value="http://www.activenetwor"/>		<a href="#">Accept</a> <a href="#">Cancel</a>

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**Document Workflow**

Program workflow is used to set a series of document flags that determine how the document should be processed within the life cycle of a program registration.

Access a Programs document workflow from the Program tab. Document workflow is defined per Program.

**Policies** – add organization policies that can be applied when building programs. These can include your refund policy, general league policies, or any waivers you want agreed to.

The table lists all policies that have been added for your organization and shows how many programs each document has been applied to. To edit or delete an existing document, highlight the policy and click the “Edit” or “Delete” button.

**Policy Manager**  
Add organization policies available to programs.

**Policies**

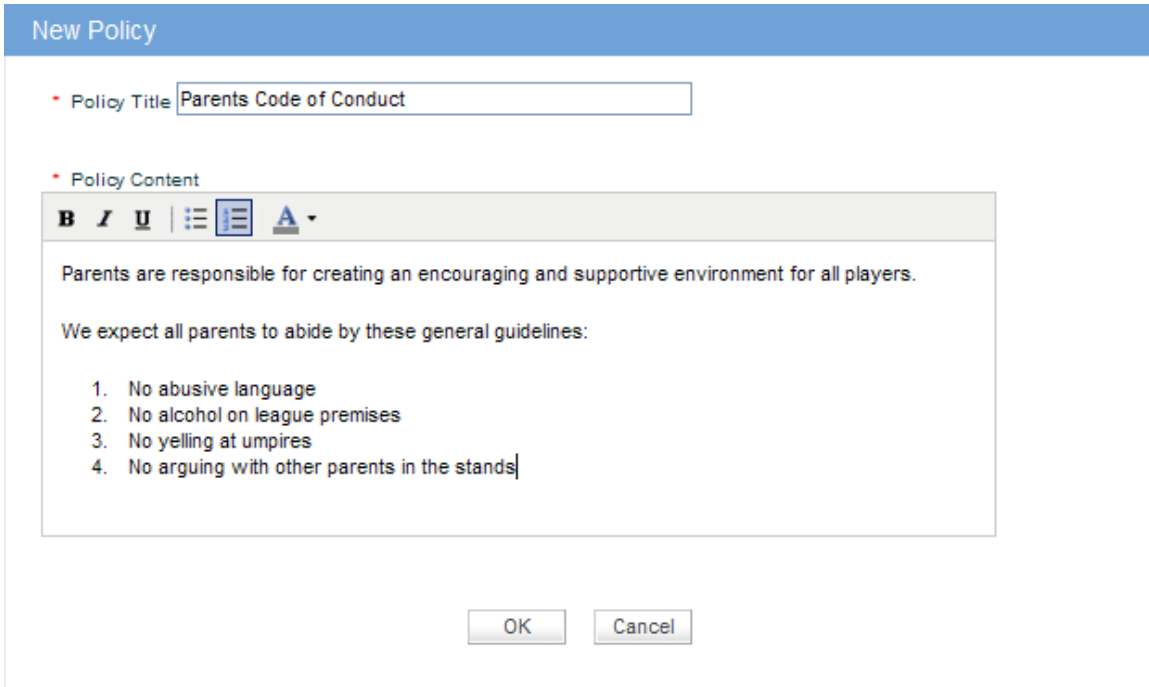
Use this area to create and manage your organization's policies.

[+ New](#)   [Edit](#)   [Delete](#)

Name	Description	# Programs Using
Test Policy	You must agree to continue	4
WAIVER TEST	WAIVER TEST!	1

[Save](#)   [Cancel](#)   [Save and Continue ▶](#)




Click the “New” button to add a new policy. The corresponding window will allow you to title the policy and provide the policy text.



New Policy

• Policy Title

• Policy Content

**B** *I* U |   

Parents are responsible for creating an encouraging and supportive environment for all players.

We expect all parents to abide by these general guidelines:

1. No abusive language
2. No alcohol on league premises
3. No yelling at umpires
4. No arguing with other parents in the stands

**FAQ's** – This tool is not currently available for self-setup. To add FAQ's to your welcome page, please contact an Active Support representative for assistance.

## Programs

**ONLINE REGISTRATION SETUP**

Organization Programs

**Program List**  
The list below contains your active and inactive programs from all seasons.

The list below contains your open and closed programs.

**New** - Click the New button to create a new program from scratch.  
**Edit** - Click the Edit button to edit an existing program from the list below.  
**Copy** - Click the Copy button to create a new program using a program from the list below as a template.  
**Preview** - Click the Preview button to display the catalog, registration, and receipt pages of your new program before activation.

Year	Season	Program	Division	Type	Group	Start Date	End Date	Status
2010 - 2011	Fall	Amanda's Fall Registration Recreational ...	Adult Rec	Team		5/1/2010	5/31/2010	Closed
2009 - 2010	Fall	Greg's Test Program #1-COPY of Rick #1	1st Division	Team		5/29/2009	8/27/2010	Closed
2009 - 2010	Fall	Greg's Test Program #1-COPY of Rick #1-C...	1st Division	Team		5/29/2009	8/27/2010	Closed
2009 - 2010	Fall	JML Test Program #1	1st Division	Event		4/22/2010	8/30/2010	Open
2009 - 2010	Fall	JML Test Program #2	1st Division	Team		4/24/2010	5/29/2010	Closed
2009 - 2010	Fall	Rick's Test Program #1	1st Division	Team		4/14/2009	7/15/2010	Closed
2009 - 2010	Fall	Rick's Test Program #2	1st Division	Team		4/1/2010	7/15/2010	Closed

The Programs tab allows you to add or edit your registration programs.

### Program List

The Program List shows all programs, past and present, for your organization. You may edit or preview an existing program by highlighting the program and clicking the appropriate button.

You may also click the “Copy” button to duplicate an existing program. This will be useful when registration is similar to a previous season. The copy function walks you through the same screens as creating a new program, but all information is initially defaulted to the program being copied so that you can keep the information that isn’t changing and edit the portions that need to be updated.

To create a new program from scratch, click the “New” button.

### Program Setup

#### Setup

Settings to control on the Setup screen include:

- Program Name – i.e. U5-U8 Recreational, Minors Baseball, etc.
- Program Type
  - Choose Team if you will be using Team Builder to place players on teams
  - Choose Event if you simply need a list of participants and will not build teams
- Season – should be the season you are opening registration for

- Division – the division that players of this program are classified as
- Registration Fee – standard fee
- Program Description – the text that will display in the catalog when selecting a program to register for
- Registration Start/End Dates
- Advanced Features
  - Specify a minimum or maximum age for eligibility into the program
  - Manual Registration – Select this option if you wish to manually register players into the program for a fee. **If manual registration is already built into your contract with Active, you do NOT need to check this. Doing so will result in a fee being incurred.**
  - Players are defaulted into a standard age group based on age and gender. For example, a 7 year old male soccer player would automatically be assigned to U8B. If you would like to force all players of a program into a particular age group rather than having them auto-assigned, select this option and specify the age group.

### Program Setup

This page contains the essential fields for Program setup.

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#### Program Setup

This page contains required fields that must be defined before the program can be opened for registrations.

\* Program Name:

\* Program Type:

\* Season:

\* Division:

\* Registration Fee:  (valid formats are \$50.00,50.00,\$125.50)

Program Description:

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#### Registration Duration

Accept registrations processed between these dates.

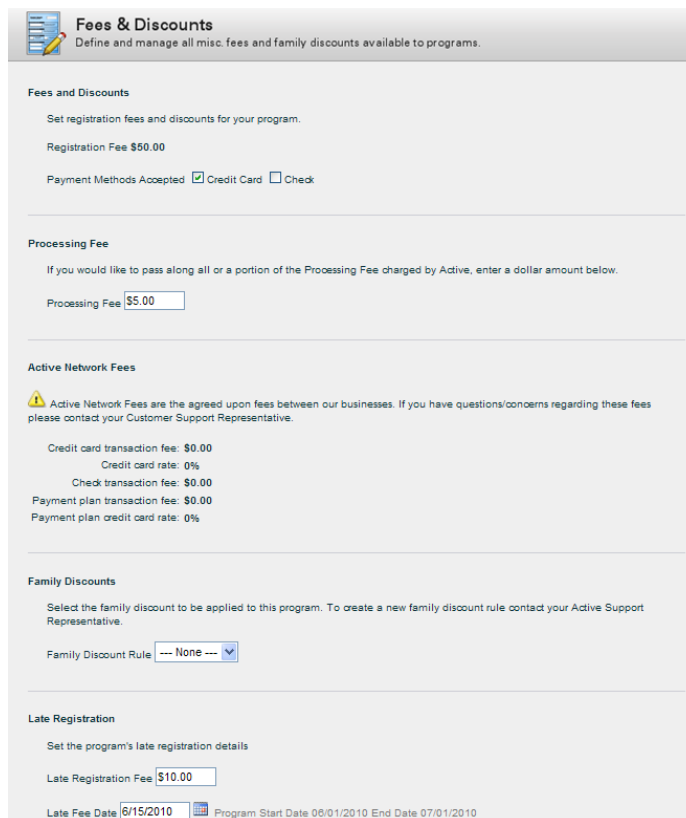
\* Registration Start Date:

\* Registration End Date:  Registration will end at midnight of the Registration End Date set. This means the program will remain available to registrants up to one day prior to the Registration End Date set.

## Fees & Discounts

Settings to control on the Fees & Discounts screen include:

- Accepted payment methods for online registrations
- What amount (if any) you would like participants to pay as a processing fee
  - If you would like to pass on the exact amount that Active is charging your organization, you can calculate this amount by multiplying the program's registration fee by the credit card rate and then adding the credit card transaction fee.
- Apply a family discount rule to the program
  - You may only select from rules that already exist for your organization. If you need to create a new rule, please contact an Active Support representative for assistance.
- Add a late fee to registration
  - If you do not wish to apply a late fee, simply leave the amount field at \$0.00
- Advanced Features
  - Enable the "Pay Now" feature which allows registrants to pay off their balance (if their original payment method was selected as check payment) or make payments in custom amounts using a credit card.
  - Add a discount for early registrations
  - Add miscellaneous fees to registration (i.e. donations, field maintenance, etc.)
    - You may only select from miscellaneous fees that already exist for your organization. If you need to create a new miscellaneous fee, please contact an Active Support representative for assistance.



**Fees & Discounts**  
Define and manage all misc. fees and family discounts available to programs.

**Fees and Discounts**  
Set registration fees and discounts for your program.


Registration Fee \$50.00

Payment Methods Accepted  Credit Card  Check

**Processing Fee**  
If you would like to pass along all or a portion of the Processing Fee charged by Active, enter a dollar amount below.

Processing Fee

**Active Network Fees**

 Active Network Fees are the agreed upon fees between our businesses. If you have questions/concerns regarding these fees please contact your Customer Support Representative.

Credit card transaction fee: \$0.00  
Credit card rate: 0%  
Check transaction fee: \$0.00  
Payment plan transaction fee: \$0.00  
Payment plan credit card rate: 0%

**Family Discounts**  
Select the family discount to be applied to this program. To create a new family discount rule contact your Active Support Representative.

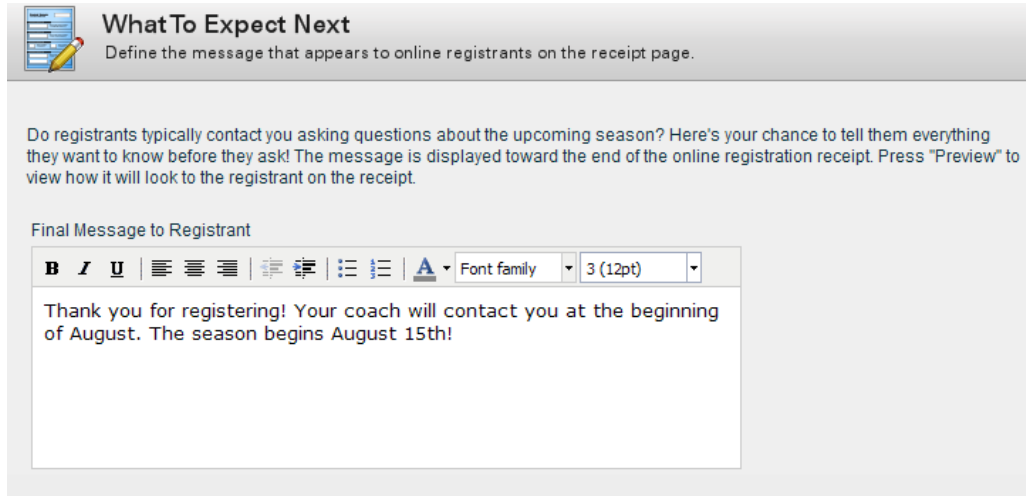
Family Discount Rule

**Late Registration**  
Set the program's late registration details

Late Registration Fee

Late Fee Date  Program Start Date 06/01/2010 End Date 07/01/2010

**What to Expect Next** - Define a message that appears to online registrants on the receipt page. This can function as a confirmation message or can provide information on your season or event.



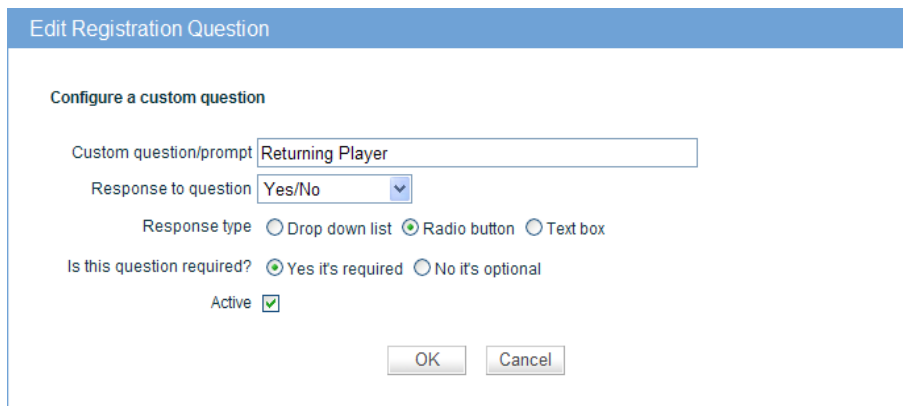
## Registration Setup

**Registration Questions** - Add or edit questions that appear on the registration form for your program.

You can select from the checkbox options to add medical questions, occupation, and employer questions to your form.

You have the ability to ask 36 custom questions across all of your programs, which is displayed as a list. The order of your questions should remain constant across all of your programs so that your Registration Report does not contain multiple questions in the same column. Those questions you don't wish to use for an individual program can simply be hidden by leaving the 'Active' button unchecked from the "Edit Registration Question" screen.

To edit a custom question, select the question and click 'Edit.' This will allow you to name the question, add a previously created set of answer options to the question, select the response type, designate the question as mandatory or non-mandatory, and set the status of the question to 'Active.'



The Advanced Features allows you to control how returning players will be assigned to teams. You can force them to their previous team, ask them if they would like to return to their previous team, or not ask at all and create fresh teams.

**Volunteers** - Select the Volunteer options and positions to be offered though registration.

- You may ask for volunteers or make volunteering a requirement.
- If volunteering is optional, reminder text can be used to encourage parents who initially decline to reconsider.
- Select which of three default positions to display.
- Display other positions unique to your club that have been previously added

Under Advanced Features, you may add a volunteer buyout which allows parents to pay a fee in place of volunteering. If using this feature, the 'Require registrant to volunteer for positions' option must be disabled so that parents may choose this option instead.

**Documents** - List any additional paperwork requested for registration (Birth Certificate, Waiver, etc.).

The table shows all documents that are currently included on registration for this program.

The “Add Existing” button allows you to add any document to the program that has been created in the Organization settings.

To add a new document, click the “New” button. A new window will appear that requires you to name the document as well as provide a description for it. If a copy of the document is hosted somewhere on the internet, you may provide the URL for the document so that parents may access it through their receipt.

- You will also be required to specify the delivery settings for the document
  - Choose ‘Program Administrator’ if the document should be turned directly into the club, ‘Coach’ if the document should be turned in at practice, and ‘Pre-Course Material’ if the document is related to a coaching clinic.
- You must also specify whether the document will prevent team assignment. If this is chosen, a player will not be able to be placed on a team within the system until the document has been marked as received through the Document Manager.
- If the document is only required of first time registrants, you may indicate so.
- If the document is only needed for this particular season, you may indicate so.
- If you would like to add any instructions regarding the document specific to the program, you can do so in the ‘Program Specific Text’ box.

### Create New Document

**New Document**

Although a document can be created within program edit, the document will be available to all programs in the organization. **Tip:** If the document definition contains a URL, test the URL in a browser to verify it is downloading the document correctly.

\* Document Name

\* Description

URL

---

**Document Delivery**

Describe how this document should be processed.

\* Document Delivery  Program Administrator  
 Coach  
 Pre-Course Material

\* Prevent player team assignment until received?  Yes  No

\* Only applies to new players?  Yes  No

\* Only needed once a year?  Yes  No

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**Additional Instructions**

Define additional instructions for this document that will be displayed to the online registrant.

Add Program Specific Text

\*

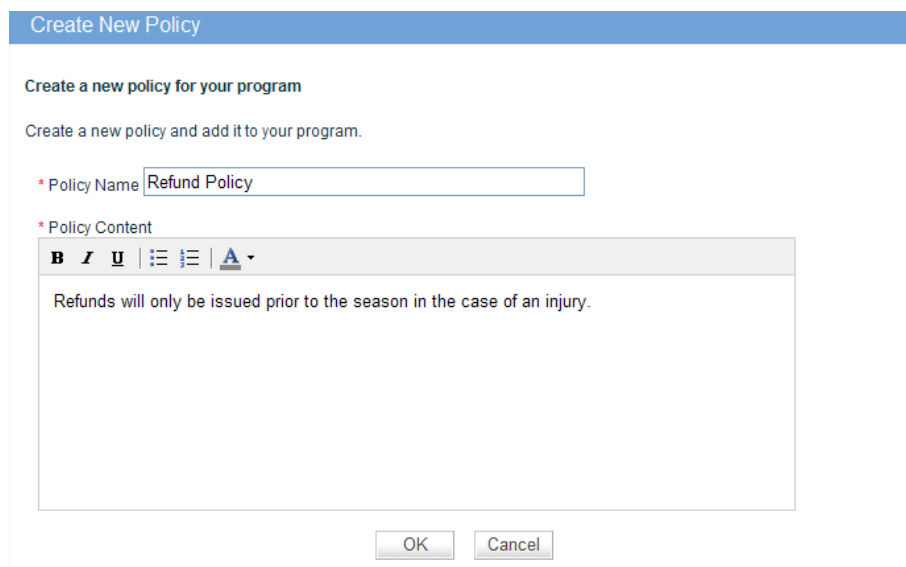


**Policies** – manage policies that must be agreed to when registering for this program.

The table shows all policies that are currently included on registration for this program.

The “Add” button allows you to add any policy to the program that has been created in the Organization settings.

Click the “New” button to add a new policy. The corresponding window will allow you to title the policy and provide the policy text.




**Uniforms** – use this tool to apply a uniform bundle (including sizes offered or prices charged) to your program. Select the bundle from the dropdown that should be applied to the program. If you need to create a new bundle or edit an existing one, please contact an Active Support representative for assistance.



## Catalog

If you are grouping programs on your catalog page (i.e. Boys Registration, Girls Registration, etc.), you may specify which group this program belongs to. Please note that this is not a requirement. You can leave all programs unassigned and they will appear listed together on the catalog screen. If you wish to create a new group, please contact an Active Support representative for assistance.



### Catalog

Manage how programs are listed in the online registration activity catalog.

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#### Catalog Setup

Catalog assignment allow you to define which registration group a program is associated with when displayed on the online registration catalog page. If you need a new group, please contact your LeagueOne Customer Service Representative for assistance.

Assign **Fall Recreational** to Group

In the Advanced Features section, you have the ability to customize a label that is displayed for the season. You also have the ability to add an announce message that will be displayed prior to the opening of registration and/or a close message that will be displayed following the close of registration.


## Activate

Once you are ready to open registration for your program, you will need to click on the 'Turn on program' button to officially activate it. Programs that have been activated will appear in your organization's catalog once the Public URL has been posted.

### Fall Recreational

Turn on program

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#### Activation

View the current program activation status and details.

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**Program Activation**


 Fall Recreational is Inactive.

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**Program Details**

Created 5/21/2010  
First Activated 6/4/2010 by UA TESTER  
Registration Start Date 6/1/2010  
Registration End Date 7/1/2010  
Announce Date 0 days before Registration Start Date  
Close Date 7/1/2010

To access your Public Website URL for linking registration to your own website or emailing the registration link to participants, go to the 'Welcome Page' from the "Organization" tab. You can copy and paste your Public Website URL from this screen. We also encourage you to visit <http://www.activenetwork.com/button.htm> to create your own online registration button for the link. Once your link has been posted, registration will be up and running for your open programs!



### Welcome Page Setup

Manage how your organization's online registration welcome page is displayed.

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**Welcome Page Title**

The page title is used if there is no page banner defined.

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**Public Access Website**

Use the public access website listed below to provide your members with a link to your online registration site.

Public Website URL: <https://systest.leagueone.com/olr/Pages/Welcome.aspx?ClubId=11860>