Updated 6/22/2011

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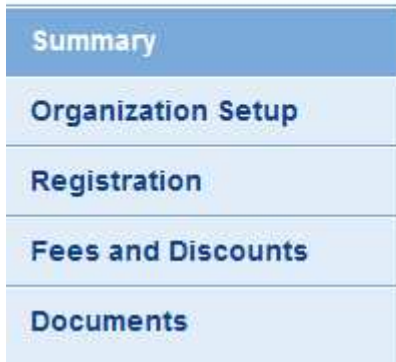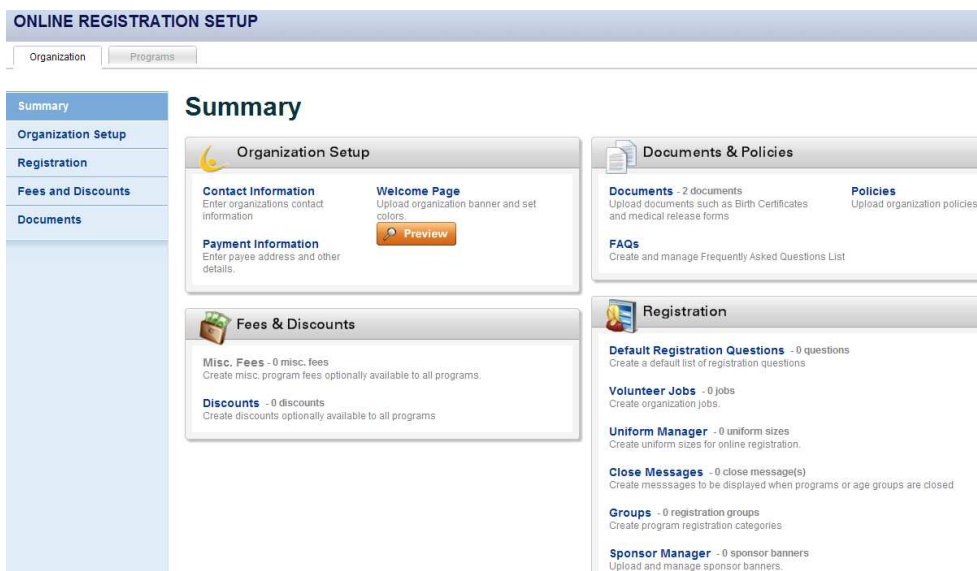
Organization

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.

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

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.

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."

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.

Sponsor Manager - This tool is 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.

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.

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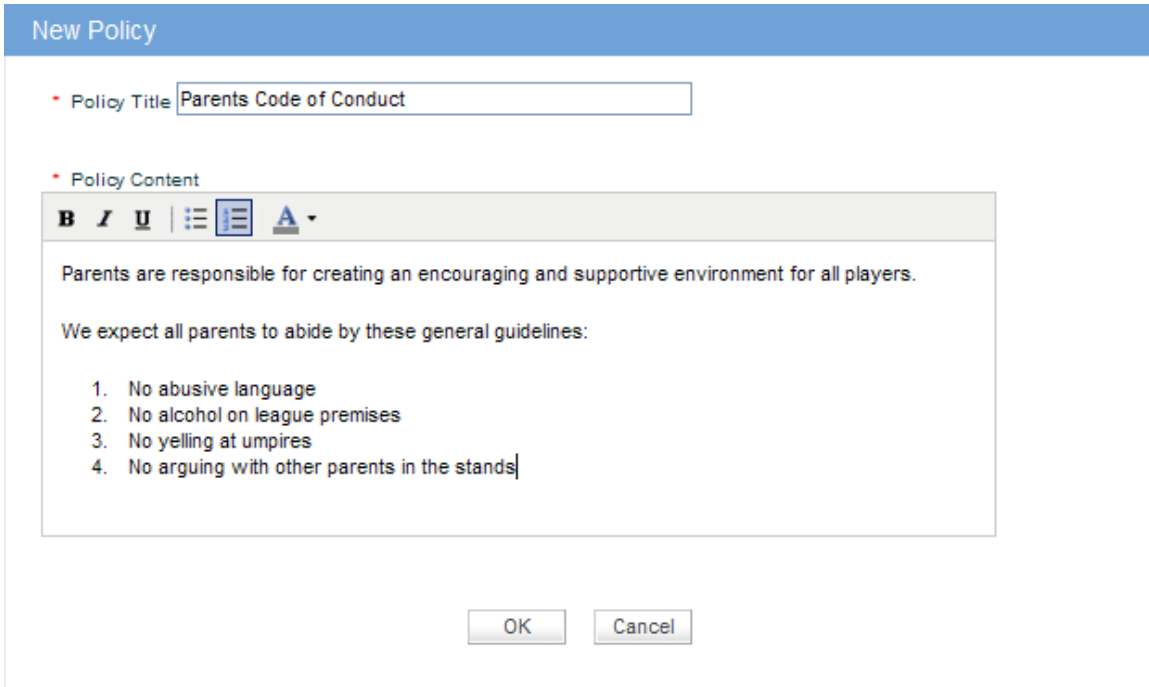
The table lists all policies that have been added for your organization and shows how many programs each document has been applied to. To edit or delete an existing document, highlight the policy and click the "Edit" or "Delete" button.

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 Parents Code of Conduct

* Policy Content

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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

OK   Cancel

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

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.

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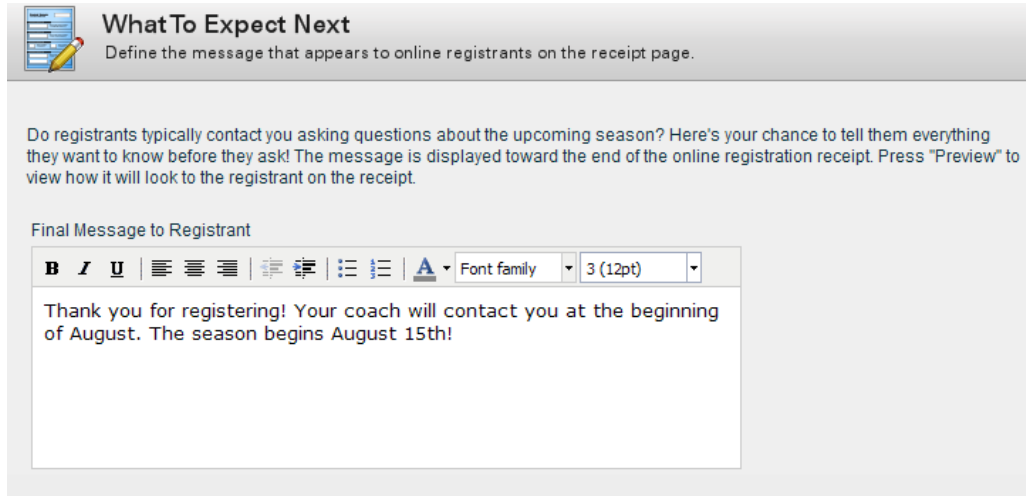
What to Expect Next - Define a message that appears to online registrants on the receipt page. This can function as a confirmation message or can provide information on your season or event.
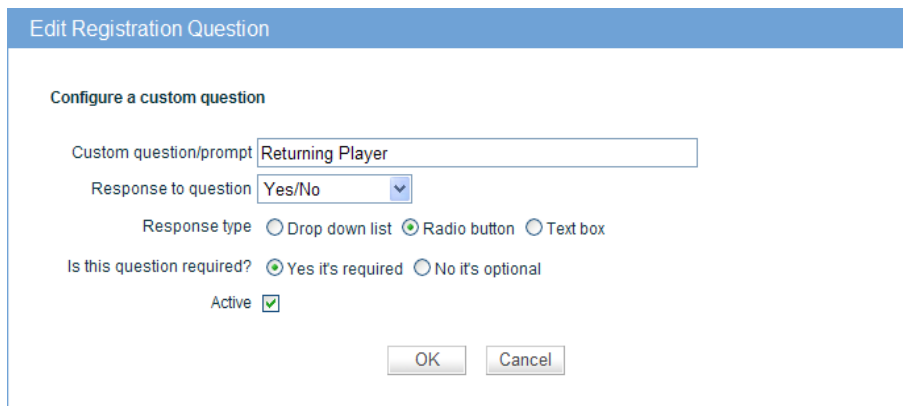
Registration Setup

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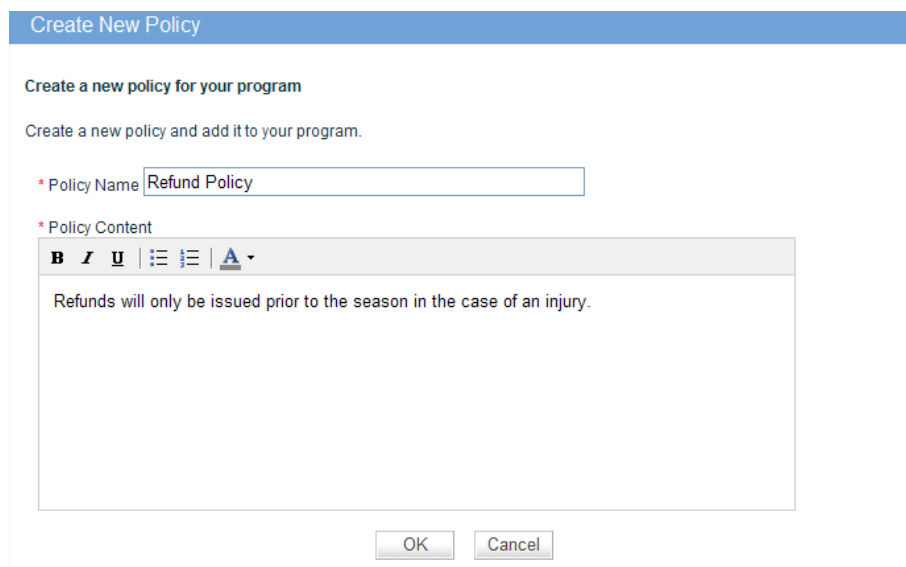
Policies – manage policies that must be agreed to when registering for this program.

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.

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.

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.

Welcome Page Title

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

L1 UA Test Club

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**