












## Online Registration

What you'll learn in this Section:

-  How to access the registration system.
-  How to create a new registration.
-  How you enforce an age group for a registration Group.
-  How you edit a registration group. How you add a new group.
-  How to add an additional per member charge. Can you make it optional.
-  How to opt out of a registration group from the multi-discount function.
-  How to perform a registration test run.
-  How to approve and assign pending registrations.
-  How to read your Registration financial reports.



[Year Round Registration Overview](#)



[Seasonal Team Registration Overview](#)



[Creating a User Defined Field](#)



[Managing your Registration System](#)

## Online Registration

The screenshot shows the 'Member Registration Setup' form with two tabs: 'Basic Setup' and 'Fees Setup'. The 'Basic Setup' tab is active. The form contains various fields and options, with numbered callouts 1 through 13 pointing to specific elements:

- 1: Registration Title: Registration - Swim Team
- 2: Short Title: VRR (<= 20 characters)
- 3: Turn on for Registration: YES
- 4: Date used to calculate Athlete's Age: (Leave it blank to use the date of the member registers)
- 5: Open For Returning Members: 12/15/2009 ~ 10/23/2011
- 6: Open For New Members: 12/22/2009 ~ 10/23/2011
- 7: Enforce Age Group Defined by Registration Group: YES - Enforce Age Group
- 8: Maximum Registrants: Global Limit (selected), Per Registration Group Limit
- 9: Email Address used to send receipt emails: sbedford@teamunify.com
- 10: Name used to send receipt emails: Shaunagh Bedford
- 11: [Club Account Number] Account Custom Field: Hide
- 12: [Insurance/Emergency] Entry Fields: Optional
- 13: [Shirts] Entry Field: Show but Optional

A note at the bottom states: "NOTE: Please [Save Changes] frequently to prevent data lost due to possible internet connection problem. Please avoid spending an extended period of time on this page without [Save Changes]."

The bottom navigation bar includes: Title Page, Agmt 1, Agmt 2, Agmt 3, Agmt 4, Agmt 5, Success, Email Promo, and a highlighted button labeled 13.

### Tips and Tricks

Did you know that you can run multiple registration systems by using the event reg piece. Try having families register for a BBQ or Christmas party.

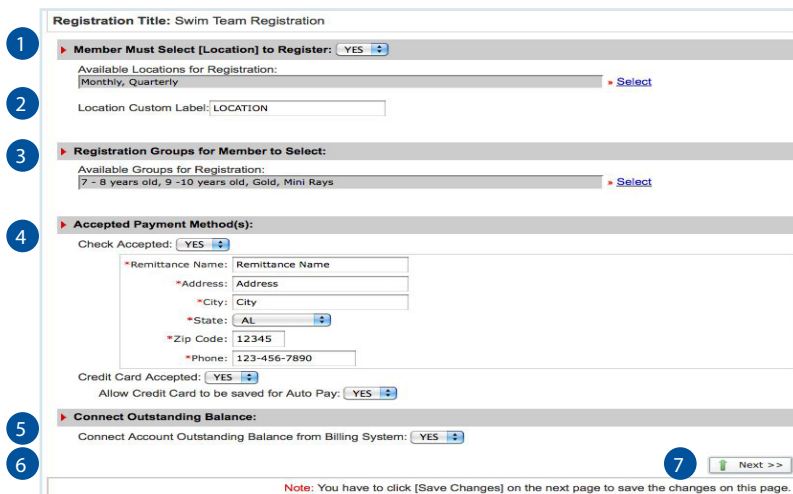
Try using the event registration piece to handle a stroke clinic. Registrants do not need to be on the TeamUnify platform to sign up.

- 1 Title of Registration - This will be public facing
- 2 Short Title of Registration - This will be admin facing
- 3 Turn on for Registration - Turns the registration system on and off
- 4 Date use to calculate athlete's age - This date is optional. You can use this to age up athletes for registration. For instance if today is April 1st and you set your age up for April 25th, everyone's birthday who falls on the 25th of April or before will be one year older for age group registrations. If you are 11 and you register today, and your birthday is April 11th, you will be put into the 12 and older age group.
- 5 Open for returning members - What is the date that this registration system will open for members currently in your database (active, suspended or canceled/hidden)
- 6 Open for New members - What is the date that this registration system will open for new members including new members of an account already on the team.
- 7 Enforce Age Group Defined by Registration Group - If you say yes, you can enforce the age range allowed for registration groups. For instance if you say 10-12 then the athlete must be that age to register for that group or the system will error the registrant.
- 8 Maximum registrants
  - Global Limit - How many total team members will you allow before the registration closes.
  - Per Registration Group - how many members will be able to sign up for each registration group. The system will error the user if the maximum is met.
- 9 E-mail address and Name used to send receipt e-mail - this will be the e-mail and name of e-mail owner shown on the receipt that is sent to the registrant.

## Online Registration

- 10 **User Defined Field** – Set the User Defined field name in TeamProfile. Use the drop downs to either enforce, show but optional or hide.
- 11 **Insurance/Emergency entry field** – optional/required. This will either enforce or not enforce the registrant to enter their insurance and emergency information.
- 12 **Jackets, T-shirts, warm ups** – optional/required/do not show
- 13 **Fill in the bottom tabs with your Title page, Waivers, & Success.** Fill in your Title page as the first page your registrants will see before they begin. Keep it relevant and to the point. You can copy and paste into each tab your official waivers and you can make these optional or enforced at checkout using the dropdown. The final page after checkout will be the success tab information.

**Save Changes.** Once you save changes select the second Tab < Fees Setup



The screenshot shows the 'Registration Title: Swim Team Registration' form. It includes sections for 'Member Must Select [Location] to Register', 'Registration Groups for Member to Select', 'Accepted Payment Method(s)', 'Connect Outstanding Balance', and a 'Next' button. Numbered callouts 1 through 7 point to specific fields and options within the form.



### Tips and Tricks

Do you want to collect how often an account would like to pay? For instance annual, monthly etc? Create a Registration group for each option. For example; Blue Monthly, Blue Annual.

Do you just need to collect the same fee for everyone? Make one group called Swim Team.

- 1 **Members Must Select [Location] to Register** – Use this option to allow your accounts to sign-up not only by group but location as well. For example Blue Group @ Location A would be \$80 and Location B would be \$100. This does not have to be different amounts but allows for member to select different locations.
- 2 **Registration Groups for Member to Select** – Use the select to the right to enable as many groups as needed. This can be as simple as having one group titled “Swim Team,” or as complex as “Blue Group Annual Payment” or “Blue Group Monthly Payment.” This allows the administrator to assign a members preferred Group Assignment and Payment Method.
- 3 **Location Custom Label** - You can place any custom label in this field to correspond with your “available Locations for Registration” as selected above. Although it says, “Location” this field designator will show to your public.
- 4 **Accepted Payment Method(s)** – You can select Checks only, Credit Cards only or both.
- 5 **Allow Credit Card to be saved for Auto Pay** - If you select yes, during the checkout the account will be able to designate that they would like the card used to update their AutoPay feature for the recurring billing system.
- 6 **Connect Account Outstanding Balance from Billing System** - Select Yes to enforce the account to pay their outstanding balance owed from the billing system at registration checkout.
- 7 **Next** - Select Next to move to the final fee setup screen and to save changes to current.



**1** Registration Group

Registration Group	Size Limit (blank, if no-limit)	Chart of Account	ALL Locations
7 - 8 years old		Annual Reg Fee	\$ 105.00
9 -10 years old		Annual Reg Fee	\$ 105.00
Gold		Annual Reg Fee	\$ 105.00
Mini Rays		Annual Reg Fee	\$ 105.00

**2** Other Per Member (Athlete) Charges:

Charge Name	Registration Group(s)	Chart of Account	Charge

**3** Per Account (Family) Charge:

Charge Name	Required?	Chart of Account	Charge
<input type="checkbox"/> One Optional Charge	N	Annual Reg Fee	\$10.00
<input type="checkbox"/> One Required Charge	Y	Administrative Fee Annual	\$10.00

**4** Multi-Athlete Discount: **YES**

Note: Please enter **Positive** values for discounts. E.g., if the discount is **\$2.00**, please enter **2** in the field. If you have more than a 5 swimmer discount please contact support@teamunify.com for help.

Discount: \$  for Account registering 2 Athletes.

Discount: \$  for Account registering 3 Athletes.

Discount: \$  for Account registering 4 Athletes.

Discount: \$  for Account registering 5 Athletes.

Chart of Account:

Groups NOT discounted:



## Tips and Tricks

Did you know you can collect additional fees by quantity? Try using the per family charge with a quantity in the amount. For example: 1 adult T-Shirt = \$10.00 2 adult T-Shirts=\$17.00 Have each selection as an optional charge.

Did you know you can opt out registration groups from the per member charge? When you create a charge nominate who it applies to. This works great for option out masters swimmers from paying the USA Reg fee.

## Fees Setup

- 1 Per Member Charge** – This is the calculated fee added to each member at checkout based on their selection during the registration process. Ensure you select a chart of accounts and enter in a dollar amount (this can be zero)
- 2 Other Per Member Charge** – This is an additional charge applied to each member (athlete) at checkout. A more common charge is USA fee. This can be applied to one registration group, many or all.
- 3 Per Account (Family) Charge** – this charge can be a required fee (annual registration fee), an optional fee (volunteer opt out charge) or a quantity amount (banquet tickets) applied at checkout regardless of how many athletes you have registered.
- 4 Multi-Athlete Discount** – Yes/No. If yes this can be applied to one, many or all member registration groups. This discount needs to be calculated based on the registration groups. For instance if you give \$20 discount on multi athletes then the 2nd child would be \$20, 3rd would be \$40, 4th would be \$60 etc. The system will add up the actual amount based on the registration groups and deduct the amount it sees in the multi-Athlete Discount.

Save Changes

## Online Registration

### Testing Your Registration System

1. Ensure all of your dates in the setup are set to open up today.
2. Turn the System off in the Registration Setup Tab
3. Ensure you Set it as current from the first screen (Registration Admin<Set as registered)
4. Begin your registration by clicking on the Start Registration/Off button located under the sign in button. Only Super Users can test this functionality.

Registered Not Registered

Export ALL Registered & Financial | Export Chart of Account (for ALL Registered) | Search

Please click the [Search] button after each filter selection change.

1. Filter Set: Age, Gender, Location, Reg. Group

2. Account: [Select]

3. Search

4. Payment Status: [Paid, Refunded, Balance]

5. Show Registration Groups

6. Managing your payments: Pay, Refund

Accounts	Members	AR	Paid	Refunded	Balance
6	12	\$1175.00	\$745.00	\$0.00	\$430.00

Account Financial Info	Member Name	Reg Date	Status	Birthday	Age	Gen	Location	Registration Group
1. [R] Amrog, Paul & Rose tvinform@gmail.com	[R] Amrog, Carly	02/21/11	Approved	02/02/97	14	F	Unassigned	9-10 years old
2. [R] Amrog, Paul & Rose tvinform@gmail.com	[R] Amrog, Jaclyn	02/18/11	Pending Team Appro	05/31/93	17	F	Unassigned	9-10 years old
3. [R] Amrog, Paul & Rose tvinform@gmail.com	[R] Amrog, Jessica	02/21/11	Pending Team Appro	10/18/90	20	F	Unassigned	Gold
4. [R] new, Spencer spencer@teamunify.com	[R] new, Spencer	02/24/11	Pending Team Appro	11/11/09	1	M	Unassigned	7-8 years old
5. [R] Laroche, Bill tvinform@gmail.com	[R] Laroche, Bill	02/25/11	Not Paid	06/17/95	15	M	Unassigned	Gold



### Tips and Tricks

You can quickly see how many remaining slots are open by clicking on Show Registration Groups from this screen (must have enforce numbers on)?

Use the Not Registered Tab to e-mail all of your accounts, including suspended and canceled/hidden. This is a great way to reach out to members that have not registered during an active registration.

### Managing Your Registration System

1. **Export All Registered & Financial** – Use this Excel report to view all information including account information, CoA details and also the IP address for the signed waivers.
2. **Export Chart of Accounts [for all registered]** – Use this report for a summary of all monies collected.
3. **Filter Set** – Use the filters to find specific Accounts/Members
4. **[R]: Returning Members** – This denotes whether the members is already in your database or is a new member.
5. **Show Registration Groups** – This not only shows what registration groups are available but will also show you how many slots are left if you have enforced this option in the setup.
6. **Managing your payments** - Select Pay to pay and update a check paying account or to apply a partial payment. Once you select Pay, you will be asked to enter in the check #, amount and a memo if applicable. Once they have paid by check or credit card, a refund button will also be available. Credit Card refunds will be automatically refunded to the card without any further intervention from the administrator.



**Warning: Registration Member Approval**

It is necessary to set the correct **Billing Group** to approve the registered members. Please select the correct Billing Group for the Members selected in the previous page.

For [Returning Members] 1	For [New Members] 2
Member Status: --Keep Existing Setting--	*Member Status: --SELECT--
Billing Group: --Keep Existing Setting--	*Billing Group: --SELECT--
Sub Billing Group: --Keep Existing Setting--	*Sub Billing Group: --SELECT--
Roster Group: --Keep Existing Setting--	Roster Group: Unassigned
Location: --Keep Existing Setting--	Location: Unassigned
	*Build ID Card# Using USA Swimming format: YES

Send Username/Password Login Instruction Emails After Approval: YES 3

**Warning:** If your team is using the [Invoices & Payments] module, the changing of Member Status from Active to Canceled or vice versa will affect the account's billing schedule.



## Tips and Tricks

You can multi select your athletes and approve & assign in one push. You can also do new members if they belong in the same billing groups/roster groups, etc.

**Approve & Assign Roster Groups** – Once you make your selection the view below shows.

- 1 For [Returning Members] – either leave the switches as “keep existing” to keep the same settings as what is currently set in your account/member admin area. TeamUnify suggests getting your account member admin < members area ready for the next season so you can leave this as all default.
- 2 For [New Members] – Toggle the switches accordingly to push your new members into the correct groups.
- 3 Send Username/password Login instruction E-mail After Approval – Only use this function for new families.



## Online Registration

---

### Frequently Asked Questions

**Q** Can I run multiple registration systems?

**A** You can only run one registration system from registration admin < Current system but you can run multiple others out of the event registration system. If you go to your events tab and select Add New Event, Step # 3: select the radio button 'Allow On-Line Reg; Connect to eReg System. Once you save changes to this event you will have the option to connect to an eReg system.

**Q** Can people not on the team use the registration system?

**A** Yes. You will need to ensure you set the Allow New Members date to be available. This is a great opportunity to run things like stroke clinics, fundraiser events etc. and offer them to the public. Ensure you do not approve and assign these new persons into your normal account member admin database.

**Q** What happens if someone is on the team and they register with new credentials? If I approve them it will create duplicate accounts.

**A** Unfortunately this is a manual fix. You will want to manually update the account already in the system and not approve the new account unless you are a new team and no data has been attached to the account in the system. IF this is the case. You can go to account member admin and delete the old account and approve the new one into the database. We do not have a merge function.

Other FAQ's that relate to this subject (go to FAQ on your site and type in these solution #'s).

1. How do I refund an Online Registration - #424
2. Can I limit/cap the number of registrations for a group? - #427
3. How do I approve members in the online registration system? – #250
4. Can I manually register a member? #329
5. Can I make a partial payment? #744

## Best Practices

### Retention & Performance Strategies

- Online registration is easy to administer and will save massive amounts of time. Online registration eliminates the need for administrators to print, deliver and gather paper.
- Allow returning accounts/swimmers to register first and new families follow. This creates a feel that your current members are a priority and gets those that are thinking of joining that your team takes care of it's families.

### Speed

- Leverage credit card processing to further reduce administrator time and dramatically improve cash-flow.

### Communication

- Use E-mail Center for announcing the new registration.
- Send a series of scheduled e-mails as a "countdown" to create excitement.
  - 10 days until registration is open
  - 5 days until registration is open
  - Only 1 day until registration is open
  - Registration is now open. Come on and join the fun!

### Polish

- Add a picture/image to the registration Title Page for branding and professionalism.
- Make the registration name descriptive and fun.
- Add the same visual polish to the "Success Page" thanking them for their registration.



 Online Registration

## Notes



## Online Registration - Inline job signups

What you'll learn in this Section:



How to use your different modules to enforce job signups during online registration



Managing and communicating for online job signups.



[Inline Job Signups](#)



### Best Practices

To enforce job signups during the registration process you need to do the following:

- Set all Members to "Waiting For Approval"
- Keep All Accounts "Active"
- Update the Title, Agreements, & Success Tab in your registration Edit to communicate your job signup policies.
- Run your Job Admin Report to show all accounts that have MET their obligation.
- Go to your Registration System Manage and Approve those athletes whose parents have fulfilled their job signup requirements.
- E-mail your newly approved accounts letting them know that their athlete(s) have been approved.

## Online Registration - Inline Job Signups

**Member Admin**

Accounts Members USA Swimming Registration

Please go to [Accounts] page to add new Members. Search Display ALL

Please click the [Search] button after each filter selection change.

Last Name: Billing Group: Sub Billing Group: Status: Roster Group: Location: Age: Workout: Inact.date: From: To:

Please select the Members below before performing these commands:

Print Member Directory w/ Picture w/ DOB w/ ID# Title: Print Attendance Check Sheet / (mm/yyyy) Title: Attendance Check She Print Mailing Labels (Avery® 8160) Workout Report

Workout: Attended at least one workout in the last 30 days (Data collected via OnDeck) Total: 509 Members

Multi-Edit Rebuild ID Remove Attended Excel SDIF Email Delete

	Member Name	Member Status	Age-Up Age	Age	Joined	Billing Group	Sub Billing Group	Roster Group	Location	Inactive Date
1	Alamillo, Lindsay	*Active	21	21	11/23/05	Dolphin	Quarterly	Cascade	Torrey Pines	
2	Amog, Carly	*Active	14	14	6/4/09	Dolphin	3 Installments	Cascade	San Diego	
3	Amog, Jaclyn	*Active	18	18	6/11/03	Junior	Monthly	Cascade	San Diego	

Title Page Agmt 1 Agmt 2 Agmt 3 Agmt 4 Agmt 5 Success Email Promo

### Tips and Tricks

Enforcing Accounts to signup for jobs during the registration process will greatly improve participation during meets. Communicate from the first meeting that participation by parents is critical to the team success.

Ensure you have a process for tracking your account job signups and decide to complete this task on a continual basis. This will help to ensure this job doesn't become overwhelming.

- Status** - Use the dropdown to select the status level to search on for placing all athletes to Waiting for Approval
- Page 1 of X** - Ensure you have all athletes showing by selecting the drop down.
- Athlete Selection** - Select one or many athletes by either selecting the checkbox to the left of the Member Name column header or manually select individual athletes.
- Multi Edit** - Select the Multi Edit Button < Place a checkbox to the left of Status < Select 'Waiting for Approval' < Save changes for all members.

**Title Page Agmt 1 Agmt 2 Agmt 3 Agmt 4 Agmt 5 Success Email Promo**

The following message will be shown on the first page of the registration:

Source

Styles Normal Font Size

Welcome to the **Sharks Swim Team** Electronic Registration platform for our upcoming swim season! We are pleased to offer electronic payment processing and registration. The process is simple for both new and returning members. You'll get access to your own private account that will enable you easily declare for swim meets, sign-up for jobs, see your children's swim times histories, maintain your own contact information, and more.

We look forward to having you join the **Sharks Swim Team** and are excited for another great season!

Don't forget you **MUST** sign up for Three Meets in order for the Sharks Swim team to approve your athlete onto our team. We need a community to run our meets and we look to you for help. Without it, we could not offer your child swim team.

- Update Tabs** - Update your Title, Agreements, & Success tab to set job signup expectations. Let your accounts know you will not approve their athlete onto the team until they have met these expectations. Have them sign a waiver to confirm they understand their role as a team member.



## Online Registration - Inline Job Signup



### Tips and Tricks

Let your parents know that they have the ability to generate this report for their job signups as well. If they ask you when they are scheduled to show up, direct them to this tab. Helping parents find the information themselves will help you run your swim team *FAR* better.

Don't forget Parent OnDeck allows your parents to track when and where they are required to be.

- 1 (Admin Only) Job signup Admin Report to Excel - Use this selection to export an Excel report of how many jobs your accounts have signed up for. Quickly see who met their job expectations.
- 2 Job Signup in This Period - Place the beginning date and end date of your season to ensure you do not miss any data.
- 3 Sorted by- Sort by Account to easily view job sign up by Account name.

	Registration Title	Status	Open to Returning	Open to New Mem	AgeGroup	Max.
1	October Reg	OFF	10/03/11 - 10/07/11	10/10/11 - 10/14/11	---	Unlimit
2	Registration - Swim Team	OFF	12/15/09 - 02/23/12	12/22/09 - 10/23/12	Enforced	Per Gr
3	Chicago - Swim Team	ON	12/15/09 - 02/23/12	12/22/09 - 10/23/12	---	Per Gr
4	* Swim Team Registration	ON	5/09 - 02/23/12	12/22/09 - 10/23/12	---	Per Gr

- 1 Select the Manage to the right of your active registration system.

## Online Registration - Inline Job Signups

**DEMO TEAM Team Registration**

Registered Not Registered

Export ALL Registered & Financial Export Chart of Account (for ALL Registered) Search

Please click the [Search] button after each filter selection change.

Member: Account: Approval Status: Pending Team Approval Payment Status: --ALL--

Age: Gender: --ALL-- Location: --ALL-- Reg. Group: --ALL--

Reg Date: To

[R]: Returning Member.

Show Registration Groups

Accounts	Members	AR	Paid	Refunded	Balance
8	9	\$1798.00	\$1184.00	\$250.00	\$614.00

1 Approve & Assign Roster Group Email Remove

2

Account Financial Info	Member Name	Reg Date	Status	Birthday	Age	Gen	Location	Registration Group
1	Connolly, Thomas & Sylvia invalid_29915@teamunify.com	[R] Connolly, Michael 10/25/11	Pending Team Approve 7/21/00	11	M	Torrey Pines	Gold	
2	Demo Account, Teamunify tom@teamunify.com	[R] book, liz 8/4/11	Pending Team Approve 7/27/07	4	F	Monthly	7 - 8 years old	

Reg'd	AR	Paid	Refunded	Balance
8/4/11	\$125.00	\$125.00	\$0.00	\$0.00
Print	Check	Pay	Refund	



### Tips and Tricks

Use your filters to help you filter by not approve, by age, "location" (remember this can be a user defined field as explained), Reg Group etc.

Using the Email function in this module is a great way to communicate to parents that their athlete has been approved.

- 1 **Account Approval** - Place a check mark to the left of the account names that were in your job sign up report who met their job requirements.
- 2 **Approve & Assign Roster Group** - Select this button to approve your athlete's into their appropriate roster groups and to set them as "Active".

**DEMO TEAM ration Member Approval**

It is necessary to set the correct **Billing Group** to approve the registered members. Please select the correct Billing Group for the Members selected in the previous page.

For [Returning Members]

Member Status: \*Active 1

Billing Group: --Keep Existing Setting--

Sub Billing Group: --Keep Existing Setting--

Roster Group: --Keep Existing Setting--

Location: --Keep Existing Setting--

For [New Members]

\*Member Status: \*Active

\*Billing Group: Blue Elite

\*Sub Billing Group: Annual

Roster Group: Unassigned

Location: Unassigned

\*Build ID Card#

Using USA Swimming format: YES 2

Send Username/Password Login Instruction Emails After Approval: NO 3

Warning: If your team is using the [Invoices & Payments] module, the changing of Member Status from Active to Canceled or vice versa will affect the account's billing schedule.

Cancel Save Changes & Approve



### Tips and Tricks

After you have approved and activated the athlete, use the manage screen to send an e-mail to the corresponding accounts congratulating them on having their athlete approved on to the team.

- 1 **Toggle your filters** for your newly approved athletes. Ensure you set the athletes as "Active" before you approve them.
- 2 **Send Username/Password Login Instruction Emails After Approval** - Toggle to yes if this is a new account and they will need a login/password to now access the site and all of its tools.
- 3 **Save Changes & Approve** - Once you have made your selection above you must select to save all changes and push into your database.