FOOTBALL VICTORIA

# PLAY FOOTBALL

## MANUAL GUIDE

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# INTRODUCTION

Football Victoria is very excited to present the new registration system to all Victorian Clubs. Play Football is the new national system for football in Australia, replacing MyFootballClub which will be implemented introduced nationwide for the 2018/2019 season.

The new system will be innovative, will deliver many benefits to clubs and participants, with a focus on making it easier and less time consuming for administrators and players, while improving the digital experience for all participants.

## SELECTION PROCESS

Football Federation Australia engaged member federations and selected clubs to gather a list of requirements that a new registrations system will contain to improve the services for the football community. FFA tendered with 16 digital vendors, looking to find a company that would not only provide a high-quality system but also a great customer service.

InteractSport was offered the contract and is an Australian organisation based in Melbourne. InteractSport are fully focused in providing digital platforms to the sporting industry and already provide registration and competition management systems to major sporting national bodies including Cricket Australia, Rugby AU and Netball Australia.

## REGISTRATION SYSTEM CHANGES

The national registration system will be ready for administrators in November 2018 in preparation for National Premier League registrations to commence in December 2018 and community competitions in January 2019.

The new system will have a fresh new look and feel, with other benefits, including:

| MY FOOTBALL CLUB | PLAY FOOTBALL |
|---|---|
| Not mobile friendly. | Mobile friendly. |
| Login via FFA ID Number. | Login via email, Facebook or Google account. |
| Hard to apply discounts. | New discount and coupon tools that will be directly linked to the club fees. |
| Clubs had to create the packages every year. | Yearly rollover of packages. |
| Combining FFA fees, FV fees and Club fees was confusing. | Automatic fee application. |
| Family accounts were separate. | Management of family registrations through one account. |

# IMPORTANT – STEPS FOR SEASON SET UP

This guide explains how to use most of the tools available on Play Football.

The steps below will guide you to go through the essential tools for the season set up.

**1st step: Enter/Update the Club Organisation Details. Explanation on** page 9.

Organisation -> Organisation Details

**2nd step: Enter/Update the Club Office Bearers. Explanation on** page 14.

Organisation -> Office Bearers

**3rd step: Enter/Update the Contacts for Parent Organisation. Explanation on** page 18.

Organisation -> Contacts for Parent Organisations

**4th step: Create Club Disclaimers which will linked to a Sign Up Form (Not mandatory). Explanation on** page 60.

Registration -> Disclaimers -> Add New Disclaimer

**5th step: Create Discounts which will linked to a Registration Product (Not mandatory). Explanation on** page 61.

Registration -> Discount Rules -> Add New Discount Rule

**6th step: Create Additional Questions which can be added to the "Other Fields" section of a Sign Up Form (Not mandatory). Explanation on** page 42.

People -> Custom Person Lists -> Custom Fields Management -> Add New Custom Field

**7th step: Create Signup Form for your Juniors and Senior players, Volunteers and Coaches. Explanation on** page 64.

Registration -> Signup Form Management -> Add Registration Form

**8th step: Create Products also known as Packages. Explanation on** page 69.

Registration -> Product Management -> Add Registration Product

# DEFINITIONS

* – Denotes a mandatory field.

**Active** – Determines that a specific tool is active. Any tool that are no longer in use, should be made inactive.

**Any Role** – Anyone who has a role in the club. For example: Players, Coaches, Volunteers.

**Cancelled Status** – Where registrant initiated the registration process and the club rejects it.

**Club Football** – Club Football is any type of outdoor football.

**Declined Status** – Where club initiated the registration process and the registrant did not accept it.

**De-Registered Status** – Where registrant was approved and de-registered later.

**Inactive** – Determines that a specific tool is inactive. This prevents having to delete and then recreate the same tool again. By making it inactive, you can reuse the tool again, as longer as you change it to active.

**No Role** – Someone who does not have a role in the club. For example: a parent of a player who plays for the club or a previous player.

**Other Products** – Other products are extra products that are not registration related. For example: socks, shirts, or any type of merchandise.

**Person Record** – Person record is a complete profile that contains basic personal details, assigned roles and associated attributes, additional details (captured using custom fields) and payment information.

**Registration Product** – In previous seasons, the registration product where called 'PACKAGES'. A registration product is the package that the participant will purchase when signing up to a club.

**Signup Form** – Signup form is the a from that captures a player's registration to the club. A form has a structure of questions, registration and other products, WWCC, photo uploads and ITC's for players, coaches, volunteers to answer to lodge a registration.

# 1.0 LOGIN PAGE

Football Victoria is responsible for providing user access for club administrators upon the club president's request.

Once the request has been made and approved by Football Victoria, the user will receive a confirmation email with their user ID and password.

The website link for users to manage their club is: admin.playfootball.com.au

## 1.1 SIGNING IN TO THE CLUB ADMINISTRATORS PAGE

**1st step:** "User ID" – Enter the email displayed on the automated email "Welcome to Play Football".

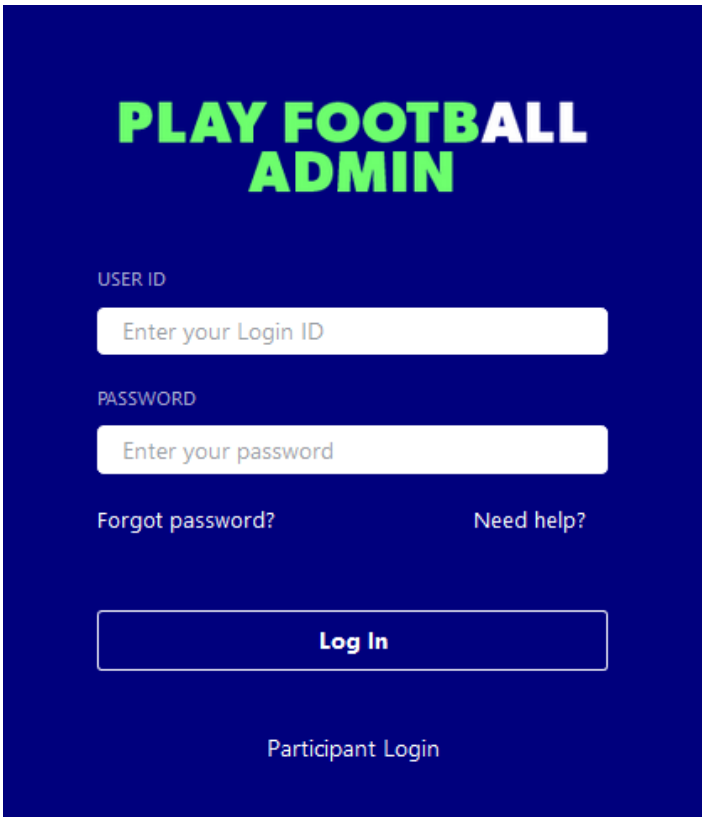
**2nd step:** "Password" – Enter the password displayed on the automated email "Welcome to Play Football". After your first loging, you can change your password. So, you should enter the new password from the moment you change it.

**3rd step:** "Forgot Password" – If you forget your password, click on "Forgot Password". An email will be sent to your user ID email.

**4th step:** "Need Help?" – If you need assistance, click on "Need Help".

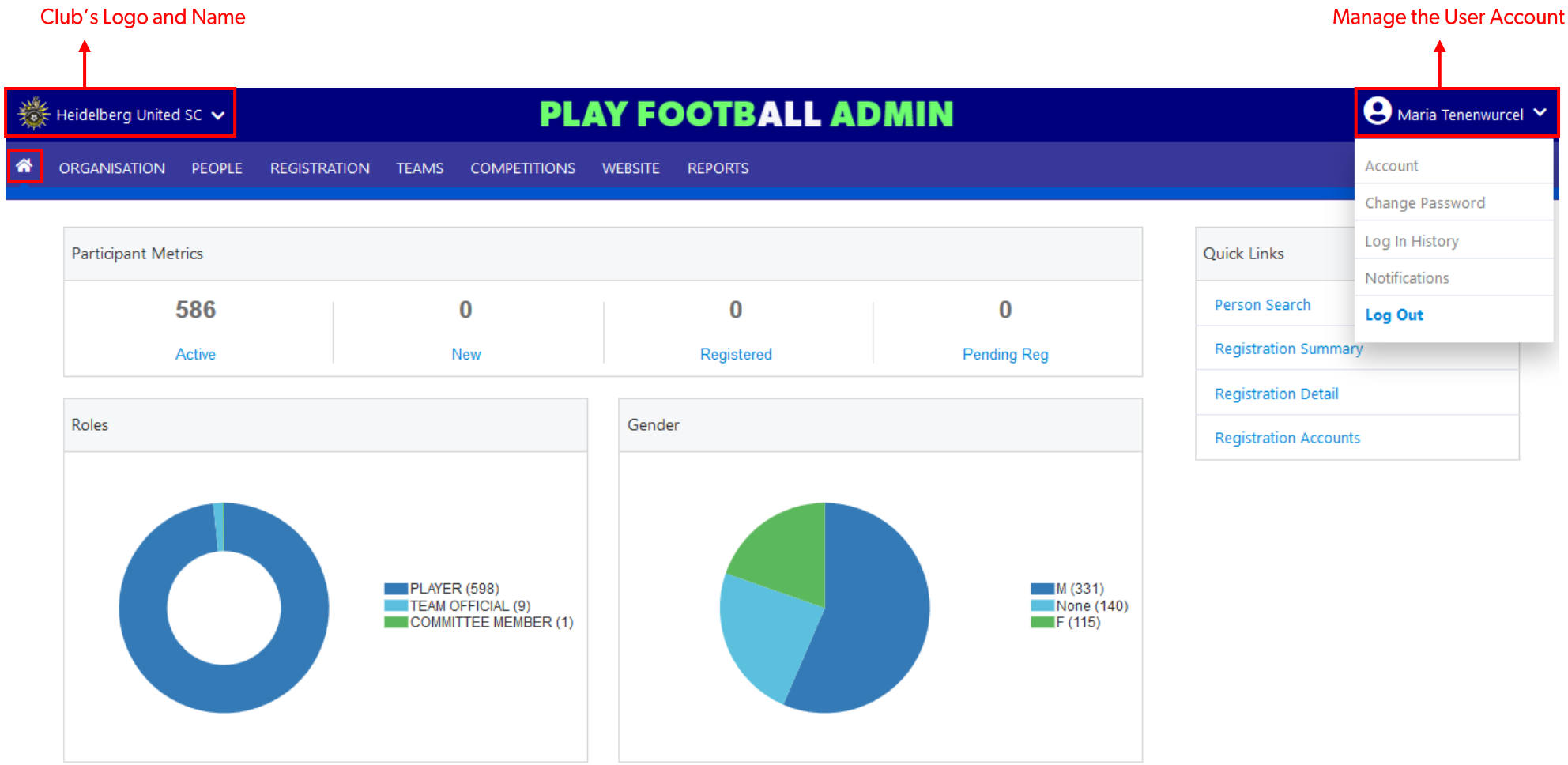
**5th step:** "Log In" – Click on "Log In", once you have entered your "User ID" and "Password".

**6th step:** "Participant Login" – Click on "Participant Login" to login as a player. Alternatively, go to this website link user.playfootball.com.au/Login



# 2.0 HOME PAGE

In the home page, you can see an overview of metrics based on registration numbers, roles, gender and age range. You can also access quick links.
In addition, you can manage your user account, change password, check the log in history and subscribe to receive notifications.



# 3.0 ORGANISATION

## 3.1 ORGANISATION DETAILS

**GO TO: ORGANISATION → ORGANISATION DETAILS**

The "Organisation Details" tab is the section where you will enter the main details of the club. It is important to complete this section accurately and fully because all this information will be live for the public on the Play Football website.

In addition, entering the right the information in this tab and keeping it up to date when change occurs, will allow clubs to maximize its participation numbers for the upcoming season. Providing precise data will make it easier for participants to find and sign in with your club. The more details you provide the more professional and appealing the club will look from the players end.

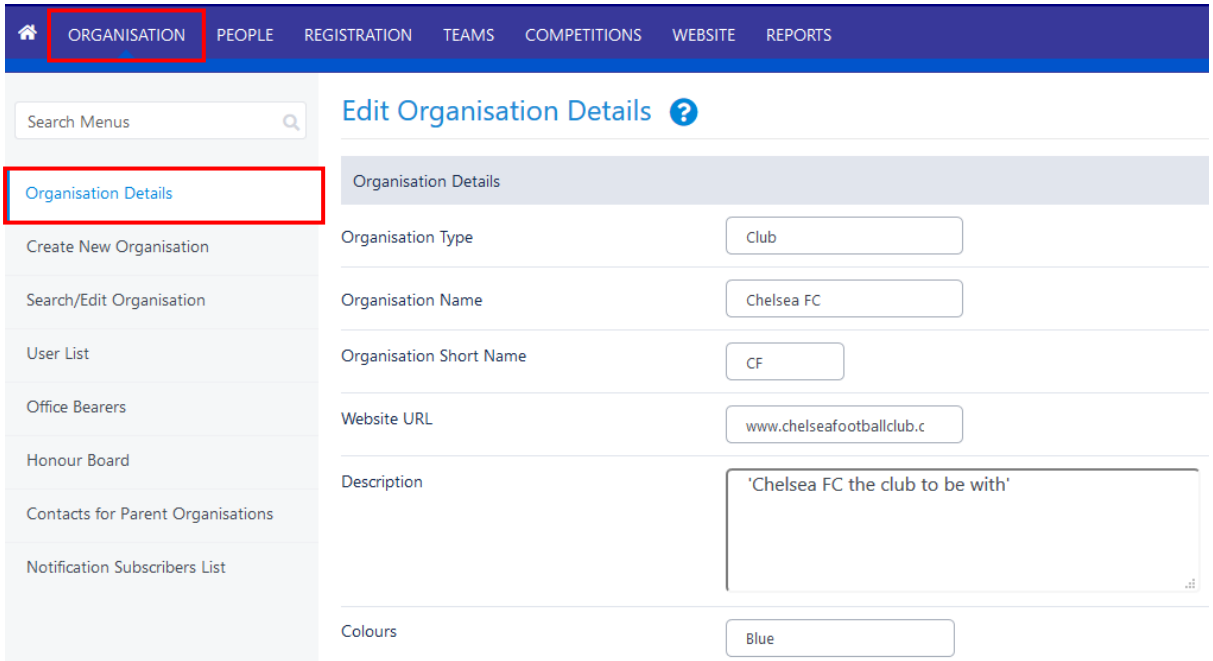
Follow the steps below to enter your club details:

**1st step:** "Organisation Type", "Organisation Name" and "Organisation Short Name" – This information can not be changed, as it set by FFA. If you need to change your club's name, you will have to contact FV and we will request the change to FFA.

**2nd step:** "Website URL" – Enter the website details of your club.

**3rd step:** "Description" – Add a desciption of your club. For example: club history.

**4th step:** "Colours" – Enter your club's colours.

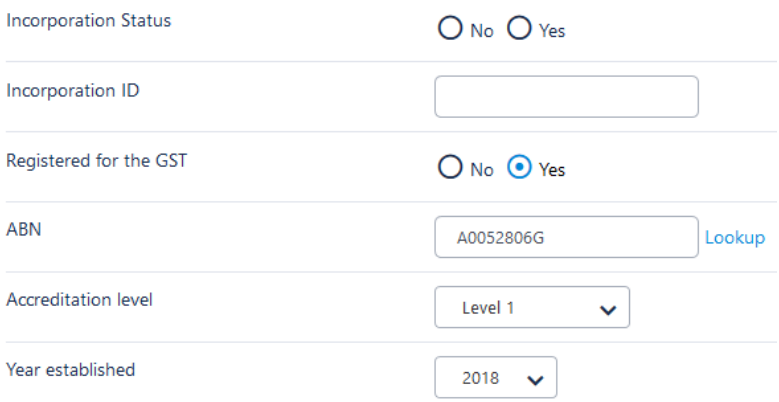


**5th step:** "Incorporation Status", "Incorporation ID" and "Registered for the GST" – Enter your club's details.

**6th step:** "ABN" – Enter the club's "ABN". If you are not sure, you can click on "Lookup" in blue, and it will help you to find it.

**7th step:** "Accreditation Level" – The accreditation level is an accreditation provided by FFA.

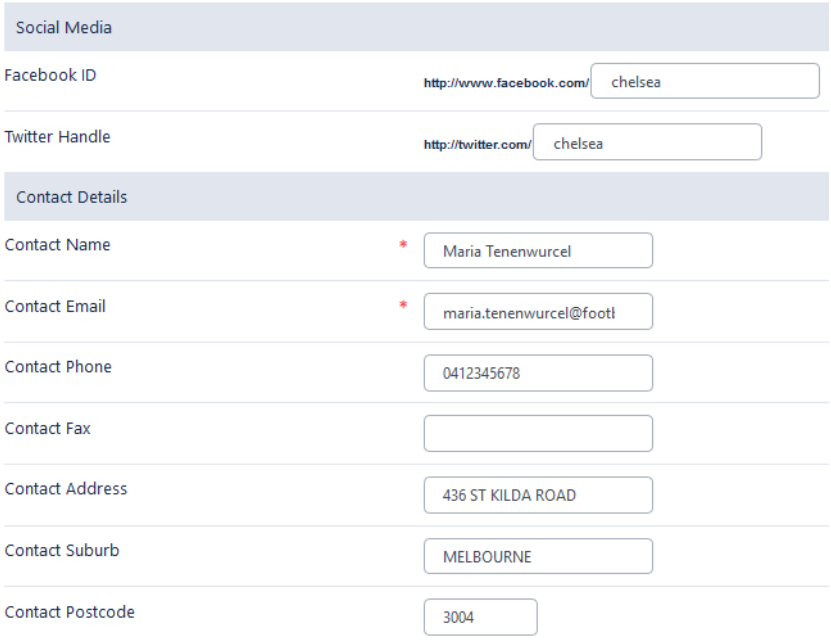
**8th step:** "Year Established" – Select the year that your club was established. This is important so FV can see when the clubs are reaching their milestones.




**9th step:** "Facebook ID" and "Twitter Handle" – Enter the Facebook ID and Twitter handle. The participants will be able to click on the social media links and be directed to the website.

**10th step:** "Contact Name" and "Contact Email" – These are the main contact detail for participants to contact if they have any enquiries.

**11th step:** "Contact Phone", "Contact Fax", "Contact Address", "Contact Surburb" and "Contact Postcode" – This does not need to be the personal details of the main contact. You can enter the clubs information.



**12th step:** "Address", "Suburb/Town", "Postcode", "State", "Country", "Ground Phone" – Enter the full address of the club's main ground and facilities of your club.

**13th step:** "Latitude", "Longitude" and "Map" – Move the red pin in the map to show the exact location of your ground. The "Latitude" and "Longitude" will be automatically updated according to the pin location in the map.

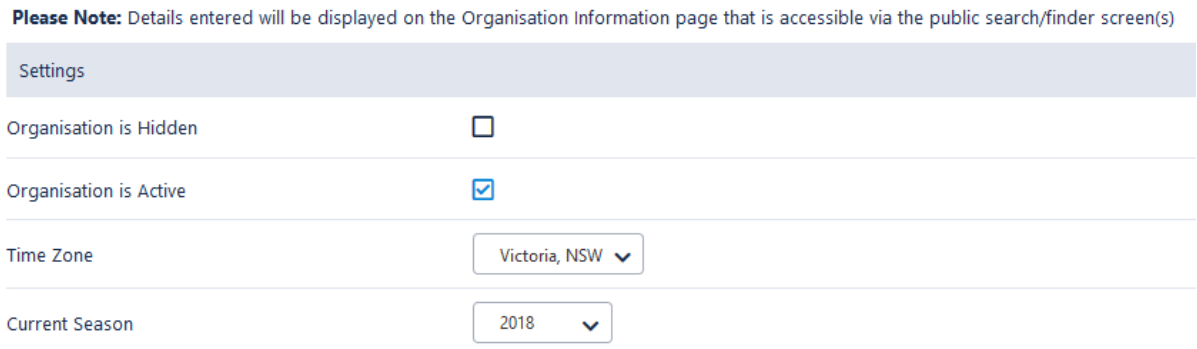
Home Venue/Club Rooms/Head Office Details (if applicable)

| | | |
|---|---|---|
| Address | * | 436 ST KILDA ROAD |
| Suburb/Town | * | MELBOURNE |
| Postcode | * | 3004 |
| State | * | Victoria |
| Country | * | AUSTRALIA |
| Ground Phone | | 61 (0) 0 0000000 |
| Latitude | * | -38.03576 |
| Ground Map Reference | | |
| Longitude | * | 145.11841 |

Map

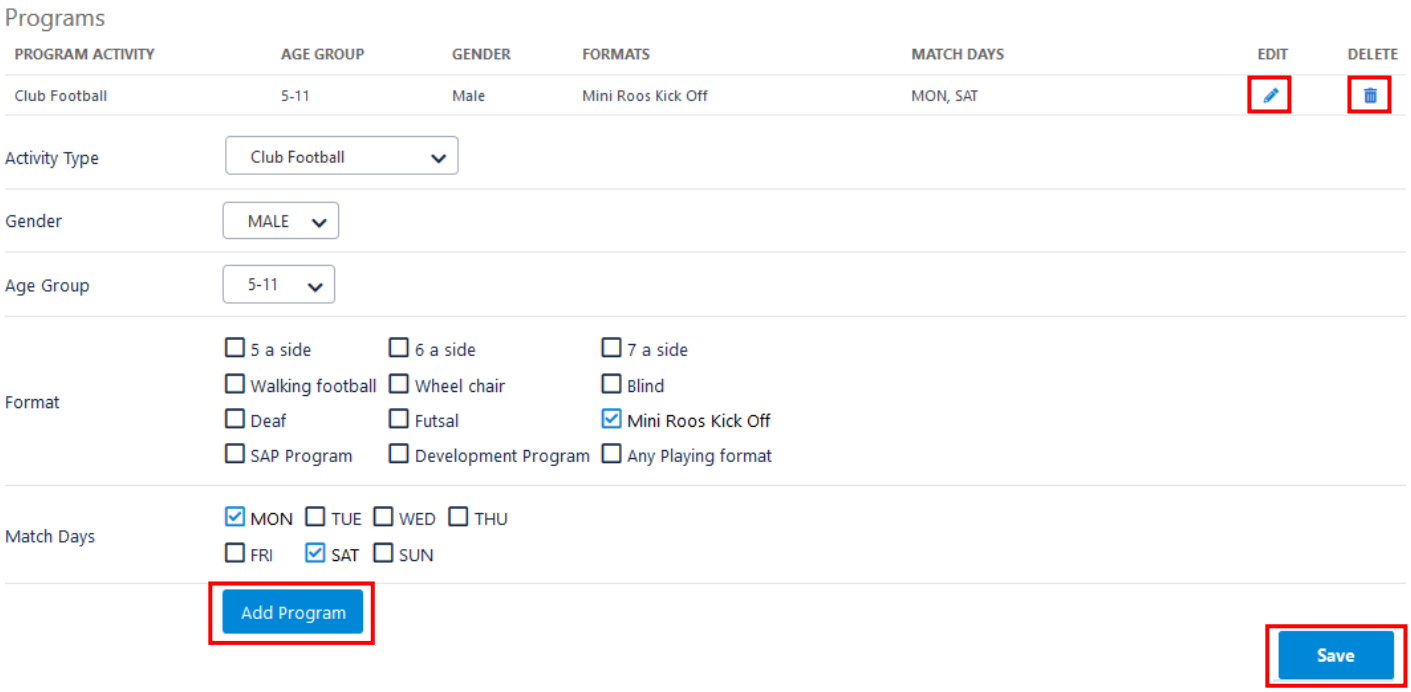
Enter the address then click the map or drag and drop the marker pin to the exact location of the venue.

**14th step:** "Settings" – The "Settings" section is set by FFA and cannot be changed.

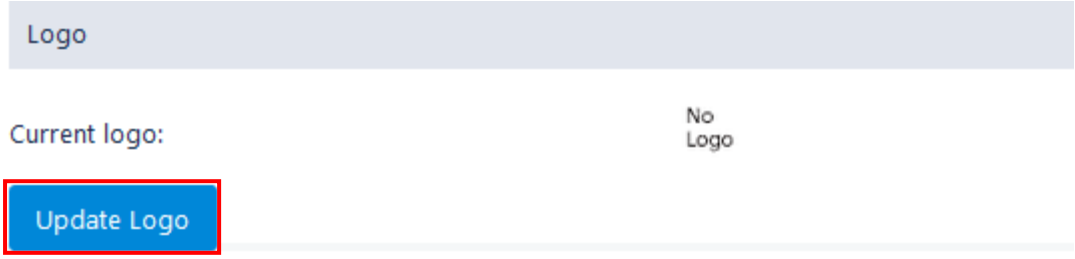



**15th step:** "Programs" – The "Programs" section is the area where you can display all the programs your club offers. This is will be linked to the search tool on the Play Football website. So, when the player goes searching for a new club, they can search by type of programs. You can edit or delete the programs already set up or create new programs.

- **Activity Type:** You can choose which type of football your club offers. "Club Football" is any type of outdoor football.
- **Gender:** The gender of participants for a specific program.
- **Age Group:** The age bracket of the participants for a specific program.
- **Format:** You can specify the type of program the club offers. If the format of football is not available, please select the option "Any Playing Format".
- **Match Days:** Select the days of your matches and training sessions for a specific program.
- **Add Program:** Once you have set the program, click on "Add Program". The program will only be saved once you press the "Save" button.



**16th step:** "Current Logo" – "Current Logo" is the section where you update the club's logo. Click on "Update Logo"and attach the image into the Play Football page. Then, click on the "Save" button which is located above the "Logo"section.



## 3.2 OFFICE BEARERS

## GO TO: ORGANISATION → OFFICE BEARERS

This allows the club to display their office bearers. This section is very important because Football Victoria needs to know who to contact at the club at all times. So, it is important to assign the club's office bearers and keep updating them in case of changes.

### 3.2.1 OFFICE BEARERS MAIN PAGE

In this page, you can add or edit the office bearers of the club. Also, there is an option to roll out the office bearers from one season to another.

**1st step:** "Season" – Select the year of the season you want to edit, and press "Go".

**2nd step:** "Office Bearers" – Click on any paper icon to create a new office bearer position. The new office bearer will appear below the selected line.

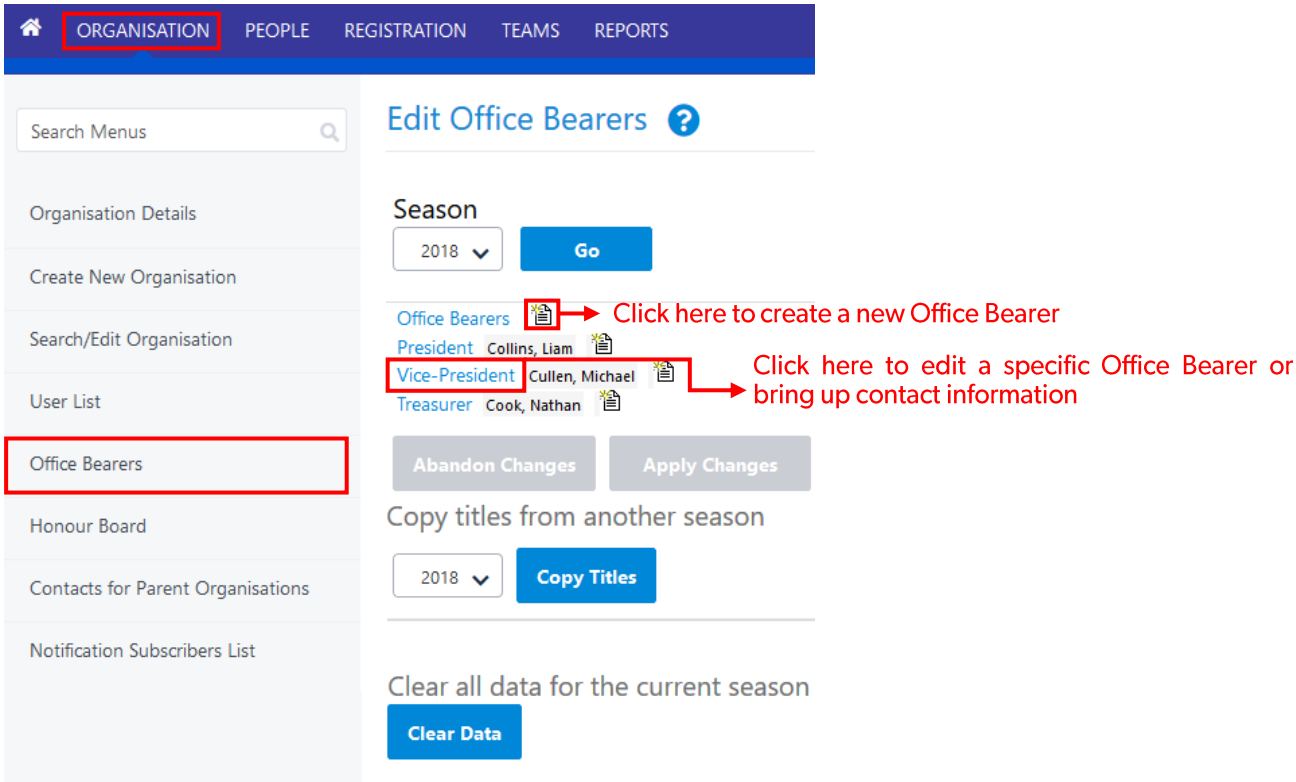
**3rd step:** "Edit a Position" – To edit a specific position, click on the officer bearer position title in blue.

**4th step:** "Copy Titles From Another Season" – If the office bearers remains the same as previous seasons, you can roll out the information by selecting the previous year, and then click on "Copy titles".

**5th step:** "Clear All Data for The Current Season" – Click on "Clear Data" to delete all the office bearers of the current season.

**6th step:** "Apply Changes" – Once you have added or edited all the office bearers, you need to click apply to changes. Otherwise, the changes will not be saved.

**7th step:** "Abandon Changes" – If you want to cancel all the changes, click on "Abandon Changes".



## 3.2.2 ADD NEW OFFICE BEARERS

**1st step:** "Season" – Select the year of the season you want to edit, and press "Go".

**2nd step:** "Title" – Insert the position title for the person.

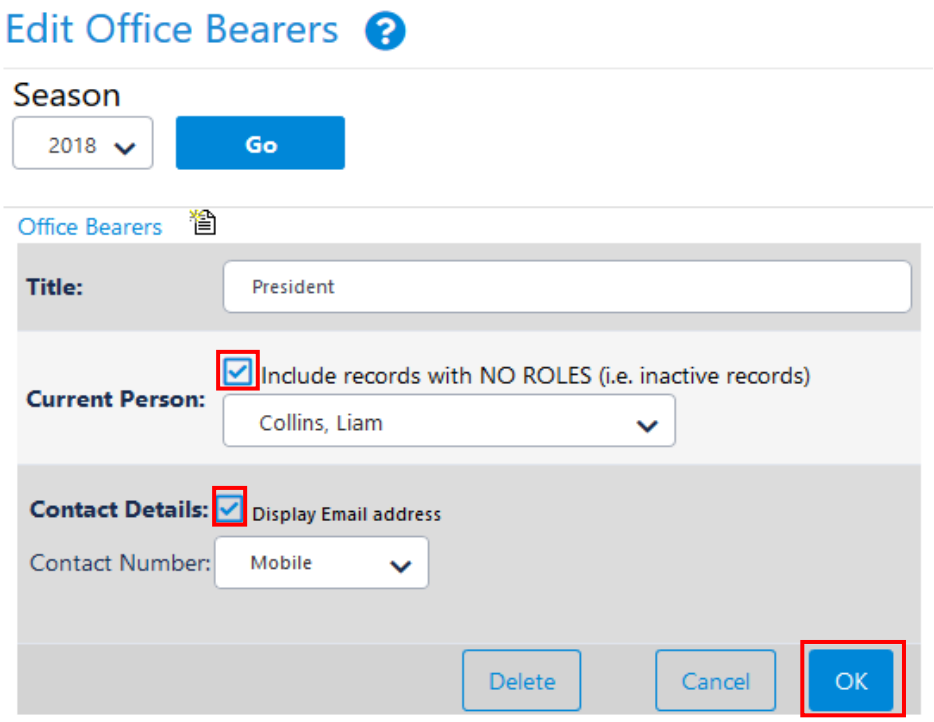
**3rd step:** "Current Person" – Select the name of the person in the drop down list. The name will only appear in the text box if the person has a person record on Play Football.

**4th step:** "Include Records with No Roles" – Tick this box, if the appointed person has a person record on Play Football but has not been assigned a role in the club.

**5th step:** "Contact Details" – To make the email address of the office bearer visible in this section, tick the "Display Email Address" box. If you want to make their contact number visible as well, select the type of phone. These information will only be available, if the person record contains those details.

**6th step:** "OK" – Once all details have been completed, click on "OK"

**7th step:** "Apply Changes" – Once you have added or edited all the office bearers, you need to click apply to changes. Otherwise, the changes will not be saved.



## 3.3 HONOUR BOARD

## GO TO: ORGANISATION ➡ HONOUR BOARD

The honour board allows the club to display the honours and awards presented to players, coaches and volunteers for each season. For example: Top scorer, player of the year, coach of the season.

### 3.3.1 HONOUR BOARD MAIN PAGE – TO DISPLAY AWARDS WINNERS

In this page, you will be able to add or edit the award winners of the club. Also, there is an option to roll out the awards' titles from one season to another.

**1st step:** "Season" – Select the year of the season you want to edit, and press "Go".

**2nd step:** "Honour Board" – Click on the paper icon to create a new title for the honour board. The new title will appear below the selected line.

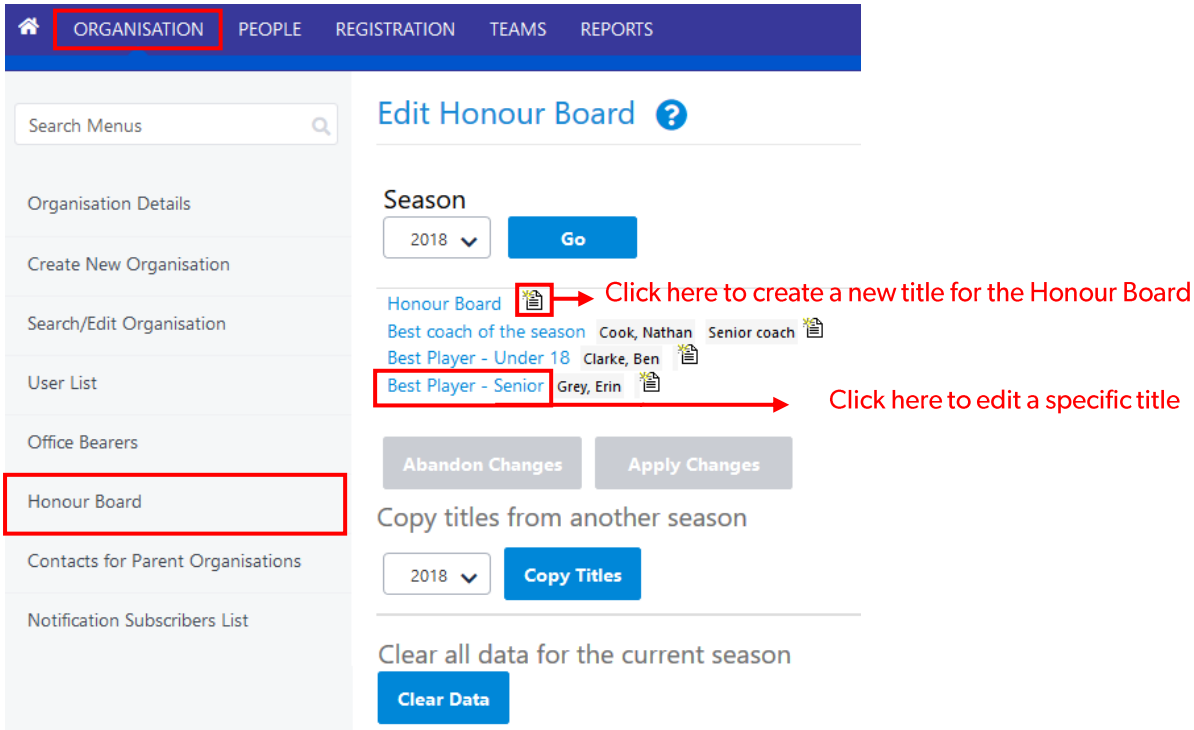
**3rd step:** "Edit a Position" – To edit a specific title, click on the title in blue.

**4th step:** "Copy Titles from Another Season" – If the titles remains the same as previous seasons, you can roll out the information by selecting the previous year, and then click on "Copy Titles".

**5th step:** "Clear All Data for The Current Season" – Click on "Clear Data" to delete all the titles of the current season.

**6th step:** "Apply Changes" – Once you have added or edited all the titles, you need to click apply to changes. Otherwise, the changes will not be saved.

**7th step:** "Abandon Changes" – If you want to cancel all the changes, click on "Abandon Changes".



## 3.3.2 ADD NEW HONOUR BOARD TITLE

**1st step:** "Season" – Select the year of the season you want to edit, and press "Go".

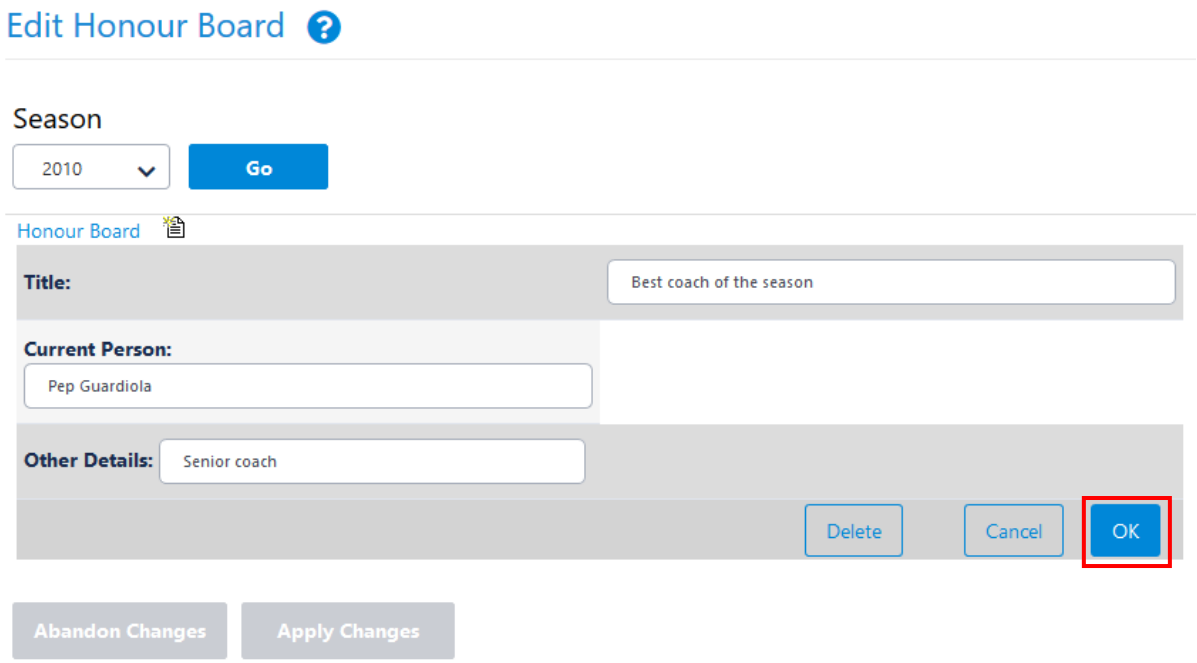
**2nd step:** "Title" – Insert the position title for the person.

**3rd step:** "Current Person" – Enter the name of the person in the text box.

**4th step:** "Other Details" – You can add any extra information

**5th step:** "OK" – Once all details have been completed, click on "OK"

**6th step:** "Apply Changes" – Once you have added or edited all the titles, you need to click apply to changes. Otherwise, the changes will not be saved.



## 3.4 CONTACTS FOR PARENT ORGANISATION

**GO TO: ORGANISATION ➡ CONTACTS FOR PARENT ORGANISATION**

This is a very important section for clubs to fill. The club will designate one or more contacts to receive communications from Football Victoria or another parent organisation.

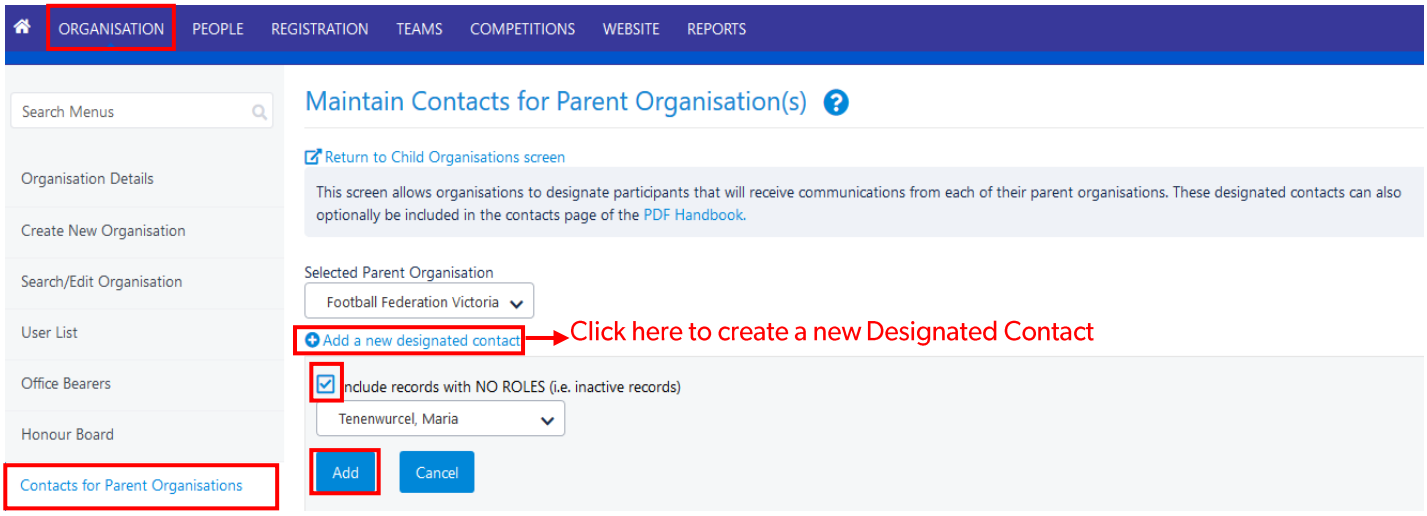
### 3.4.1 ADD NEW DESIGNATED CONTACT

**1st step:** "Select Parent Organisation" – Choose the parent organisation that you want to designate the contact to, from the dropdow list.

**2nd step:** "Add a New Designated Contact" – Click on the "Add a New Designated Contact" in order to add a new contact to the list.

**3rd step:** "Include Records with NO ROLES" – Tick this box, if the appointed person has a person record on Play Football but does not have a role within the club.

**4th step:** "Add" – Select the name of the person who you wants to add on the list and then click on "Add". The name will only appear in the text box if the person has a person record on Play Football.




The list of all people who has been designated as a contact for a specfic parent organisation will appear. The person email and mobile phone will only be dispplayed, if the person has completed this information in their person record.

**5th step:** "Name" – To change/add the person email or mobile phone, click on their name in blue. This will link to the person record page.

**6th step:** "Options" – Tick the boxes to indicate which communication channels a person should receive from the parent organisation

**7th step:** "List in PDF Handbook" – The parent organisation may want to generate a PDF handbook, including clubs information. Tick this box if you want the contact to appear in the PDF handbook.

**8th step:** "Remove" – To remove the person out of the contact list for the parents organisation.

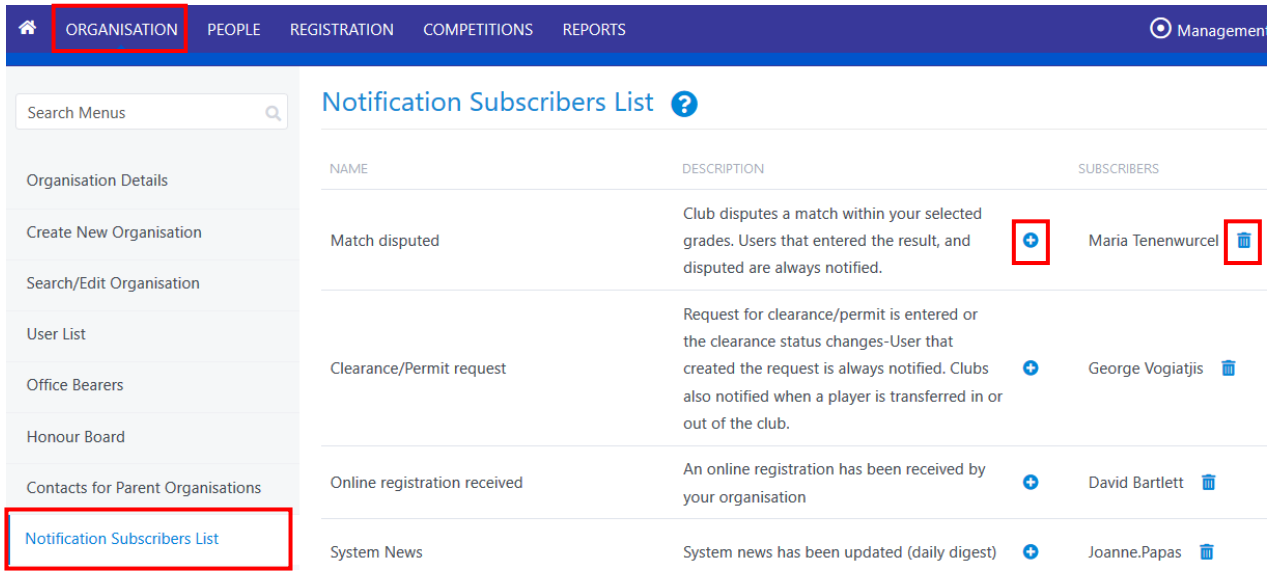
**9th step:** "Update All Changes" – The information will only be saved and updated, once you click on "Update All Changes".

## 3.5 NOTIFICATION SUBSCRIBERS LIST

## GO TO: ORGANISATION ➡ NOTIFICATION SUBSCRIBERS LIST

This allows specific Admin Users to receive system notifications. For example, a User can subscribe to the 'Match disputed' notification and select one or more Grades of interest. When a match is disputed that involved the Club or Association within the selected Grades, a notification email is sent.

This gives Clubs and Associations a flexible way of determining who is notified in certain situations. Over time, the list of notifications will be expanded to replace many situations where the 'Principle User' is notified by default.



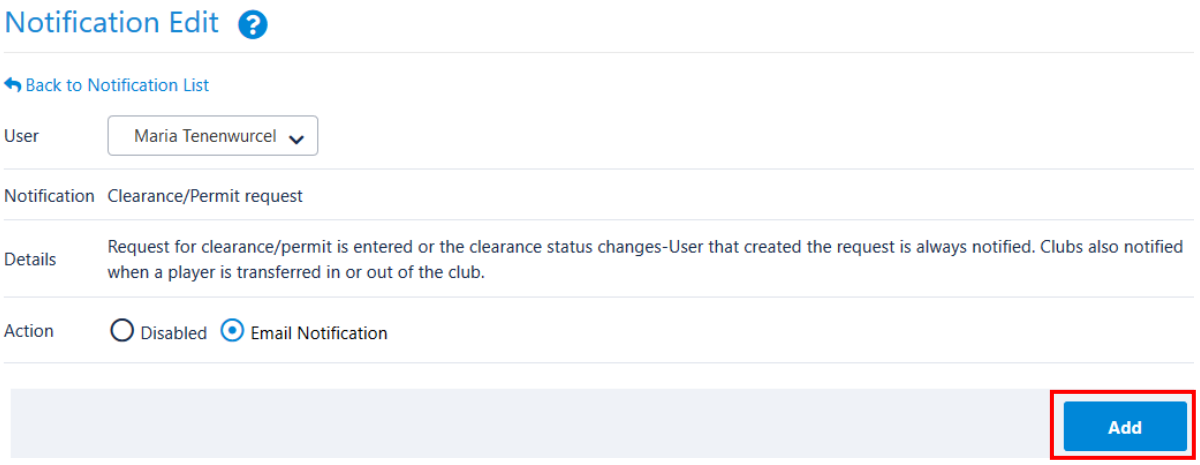
**- Subscribing to a Notification:** To subscribe to a notification, click on the plus icon of the notification. This opens the Notifications Edit screen. See "Editing a Notification" below.

**1st step:** "User" – Select the user you want to assign the type of notification.

**2nd step:** "Notification" – Can not be changed. It informs which notification type the person is signing up to.

**3rd step:** "Details" – Can not be changed. It provides the description of the notification type.

**4th step:** "Action" – Select "Email Notification" in order to activate the notifications. Then press "Add".




**- Removing a Notification:** To remove a notification, click on the "Bin Icon" of the notification. After removing a notification, you will no longer receive emails for that notification.

# 4.0 PEOPLE

## 4.1 PERSON LIST

**GO TO: PEOPLE ➡ PERSON LIST**

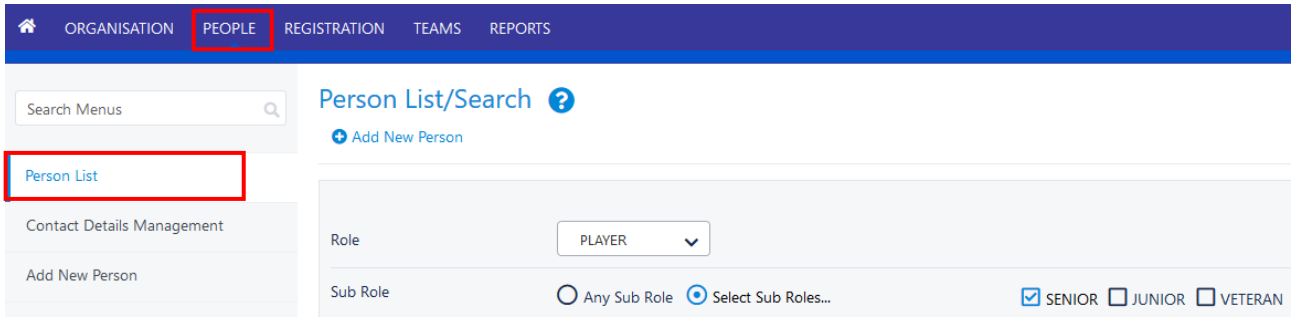
The "Person List" tab is your clubs CRM, used to search and find a registered person.

### 4.1.1 PERSON LIST MAIN PAGE – TO SEARCH AND EDIT A PERSON RECORD

On the "Person List" tab, use the available filtering criteria to search for a particular person record, or a selection of records matching your preferred filter.

**1st step:** "Role" – Select a role. "Any Role" relates to any person who have at least one role within the club while "No Role" relates to a person who has no roles withing the club. For example: a past player or a parent.

**2nd step:** "Sub Role" – There are two types of sub role: "Any Sub Role" which includes all the sub roles within the selected "Role" or "Select Sub Roles" where you can select one or more sub roles to target a particular group. For example: To choose a senior player, select the option "Player" in the field "Role" and then select the option "Senior" in the field "Sub Roles".



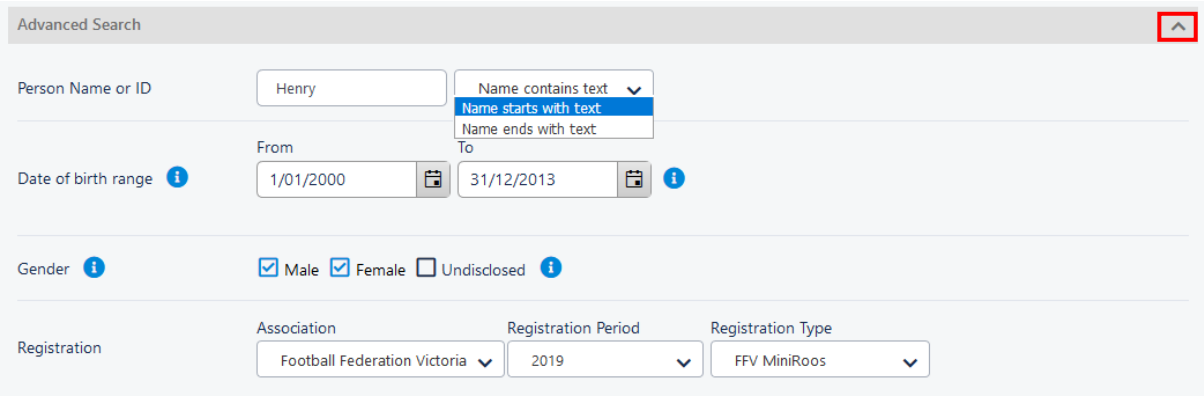

**3rd step:** "Advanced Search Criteria" – Click on the arrow of the "Advanced Search Criteria" section to enable more detailed filtering. If you do not want to apply one of the advance serach criterias, leave the fields blank.

**4th step:** "Person Name or ID" – Enter the name or ID number to search for a particular person. This search will match both first and last names. You can also make a selection in the dropdown box relating to whether the name starts with, ends with or contains the entered text.

**5th step:** "Date of Birth Range" – Enter the date of birth "From"and "To", to target a particular age group.

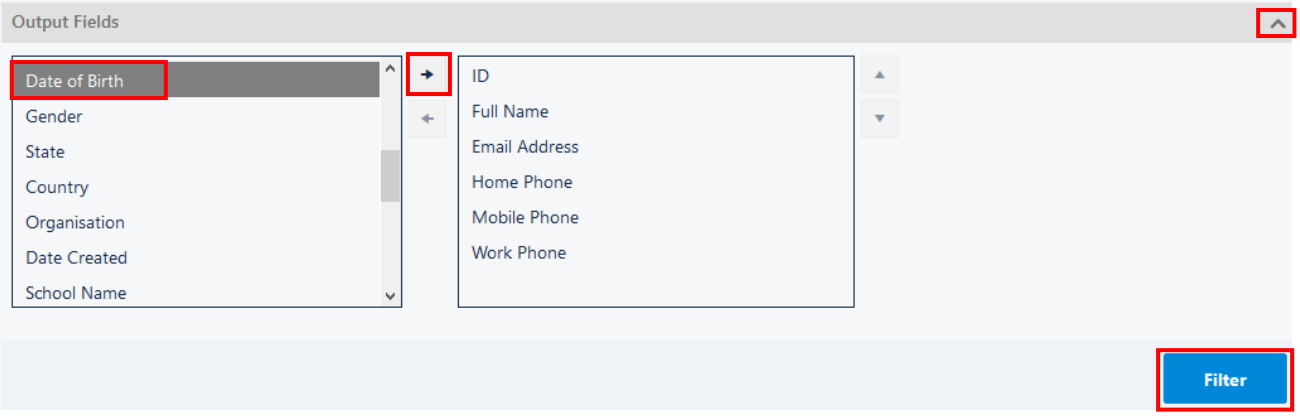
**6th step:** "Gender" – Tick one or more boxes to choose the gender category.

**7th step:** "Registration" – "Association", most clubs will be choosing the option "Football Victoria". However, if your club is under an association, you should choose the association option. Select the "Registration Period" and "Registration Type" options to narrow down information based on date of registration and registration type.




**8th step:** "Output Fields" – Click on the arrow of the "Output Fields" section to customise the fields that will display for your search. To select one new criteria, click on the criteria and then on the arrow pointing to the right.

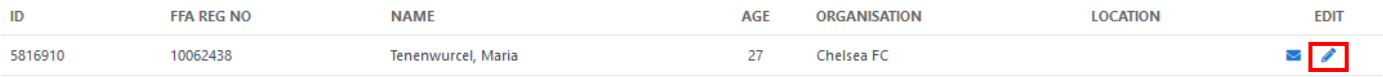
**9th step:** "Filter" – Click on filter to see the result of the search.



## 4.1.2 PERSON EDIT PAGE – TO EDIT A PERSON RECORD FROM THE PERSON LIST

The person edit page is the area where you can see or edit the full personal details of players, volunteers, coaches and any other registrants of your club. To go to the "Person Edit" page, click on the pencil icon.

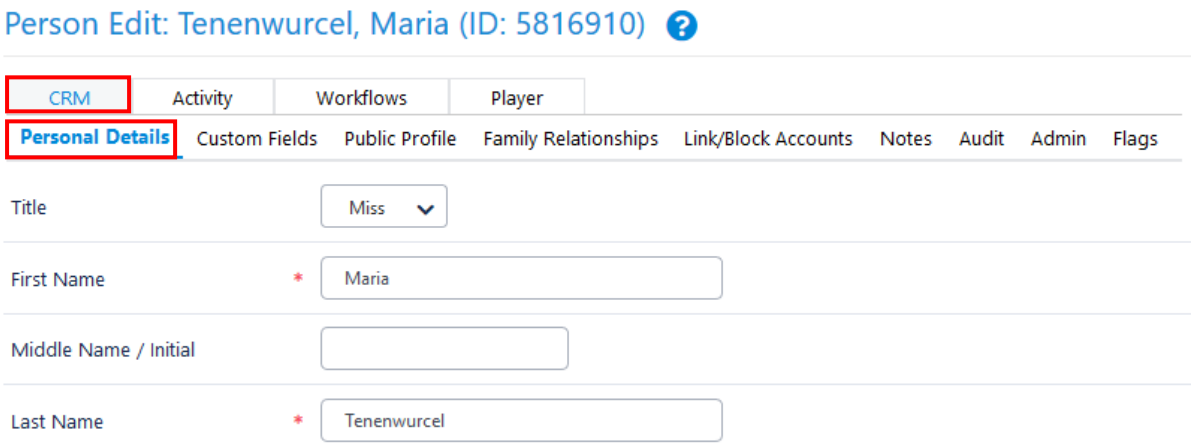
Each tab will allow you to access and manage different sections of the person record.



| ID | FFA REG NO | NAME | AGE | ORGANISATION | LOCATION | EDIT |
|---|---|---|---|---|---|---|
| 5816910 | 10062438 | Tenenwurcel, Maria | 27 | Chelsea FC | | |

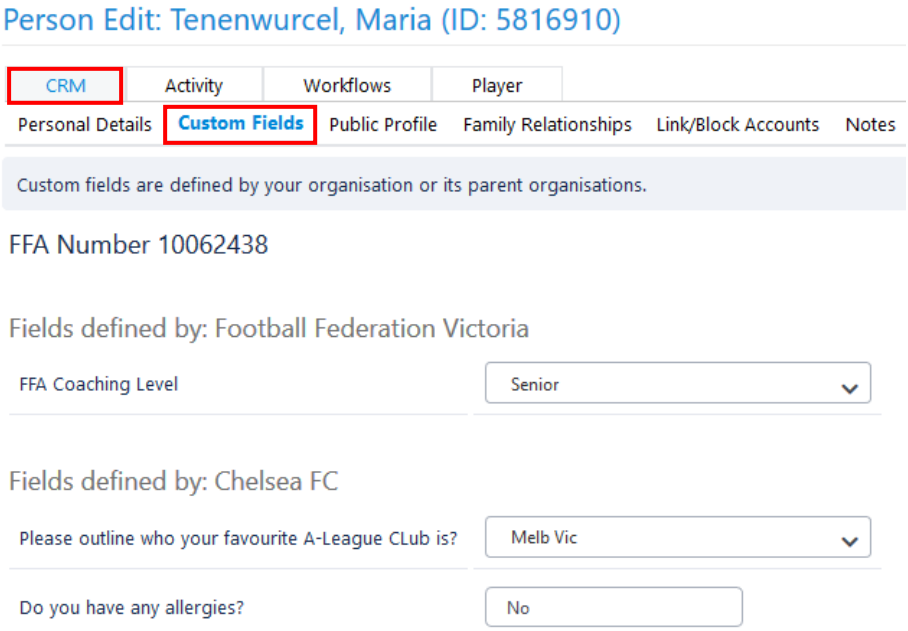
### 4.1.2.1 CRM / PERSONAL DETAILS – TO SEE THE MAIN DETAILS OF A REGISTRANT

The "Person Details" tab is where you can see the full personal details of a registrant. You can also edit some of the fields.




### 4.1.2.2 CRM / CUSTOM FIELDS –ADDITIONAL QUESTIONS OF A REGISTRANT

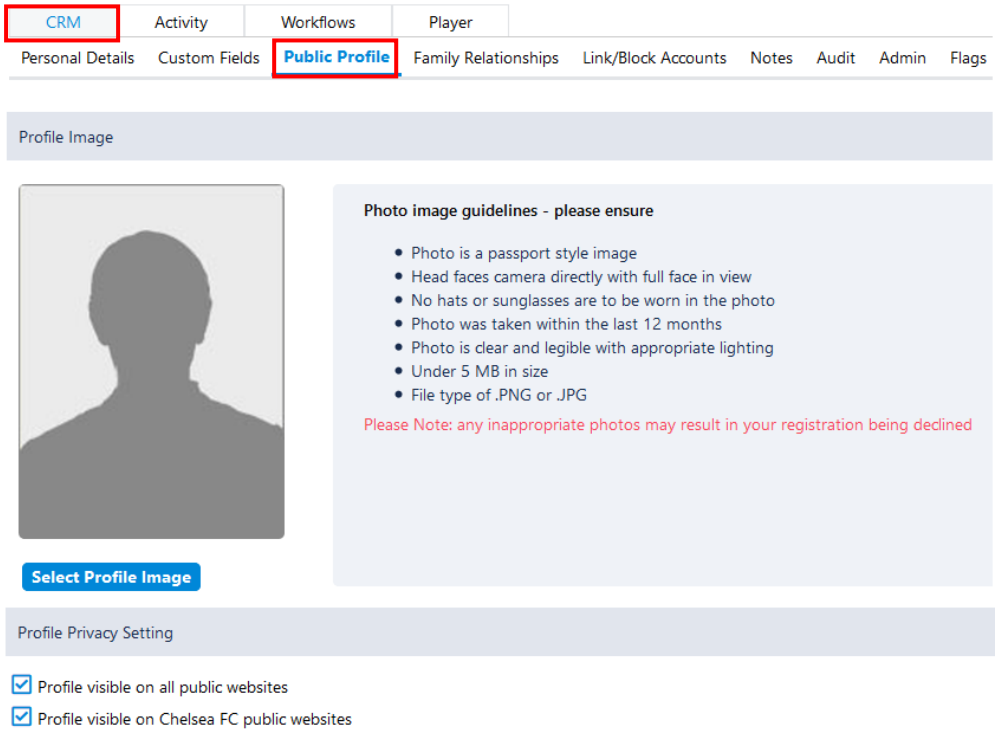
The "Custom Fields" tab is where you can see the registrants FFA number and answers to all their additional questions.



### 4.1.2.3 CRM / PUBLIC PROFILE – PROFILE PHOTO AND MANAGEMENT OF PRIVACY SETTINGS

The "Public Profile" tab is where you can see/change the profile picture of registrants and you can manage their privacy setting. You can also find the photo guidelines. Please, ensure all your players follow the photo guidelines.

- **Profile Visible On All Public Websites:** It will allow the registrant profile to be seeing in all public websites.
- **Profile Visible On The Club Public Websites:** It will allow the registrant profile to be seeing in all public websites of the club.



### 4.1.2.4 CRM / FAMILY RELATIONSHIPS – LINK ACCOUNTS OF DIFFERENT REGISTRANTS

The "Family Relationships" tab allows you to link one account to another. A parent can manage all their kids account from one main account, as longer as the kid account is linked to the parent account. Also, having siblings linking their accounts to one another, will allow them to claim the sibling discount, if the discount has been pre-set by the club.

To link an account, follow the steps below:

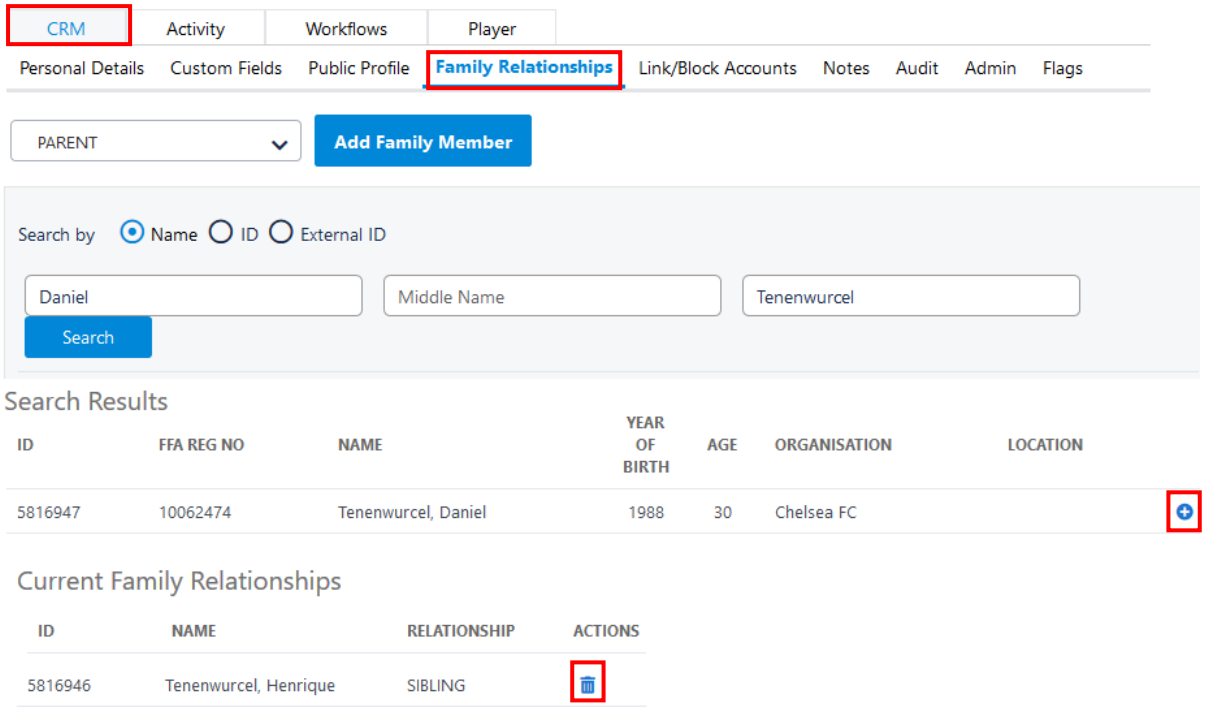
**1st step:** "Add Family Member" – Select the family relationship of the person you want to link to the current account. Then, click on the button "Add Family Member"

**2nd step:** "Search for the Person Record" – You can only link accounts among people that have been registered on Play Football. Search the person record by Name or ID number and then press "Search".

**3rd step:** "Linking the Person Record" – Once you press search, the profile of the person should be populated. In order to link their account to the current account, press the plus icon.

**4th step:** "Current Family Relationships" – Once you have linked accounts, you will be able to see all the accounts that are linked with the current account under the "Current Family Relationships" section.

**5th step:** "Unlinking account" – To unlink accounts, press the bin icon

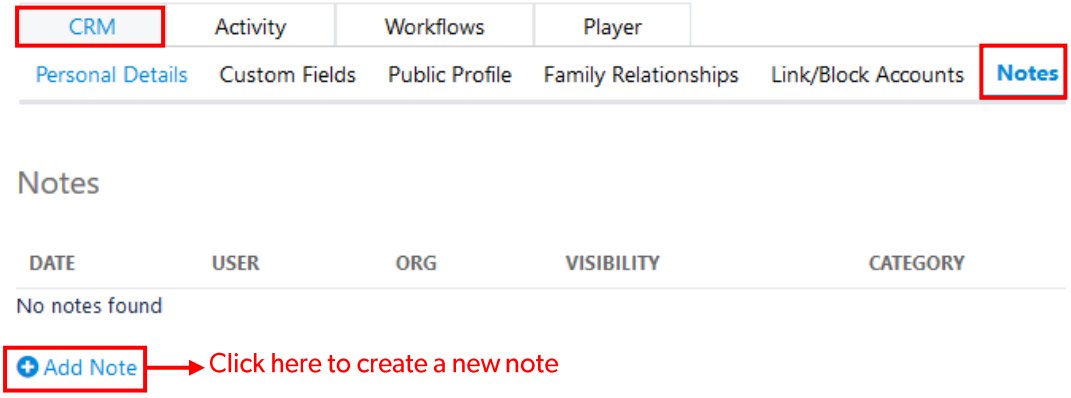


### 4.1.2.5 CRM / NOTES – TO CREATE A NOTE ABOUT A PARTICIPANT

The "Notes" tab is a section where you can create notes to a specific registrant. You can also restrict on who can view the note.

To create a note, follow the steps below:

**1st step:** "Add Note" – Click on "Add Note" to create a new note.

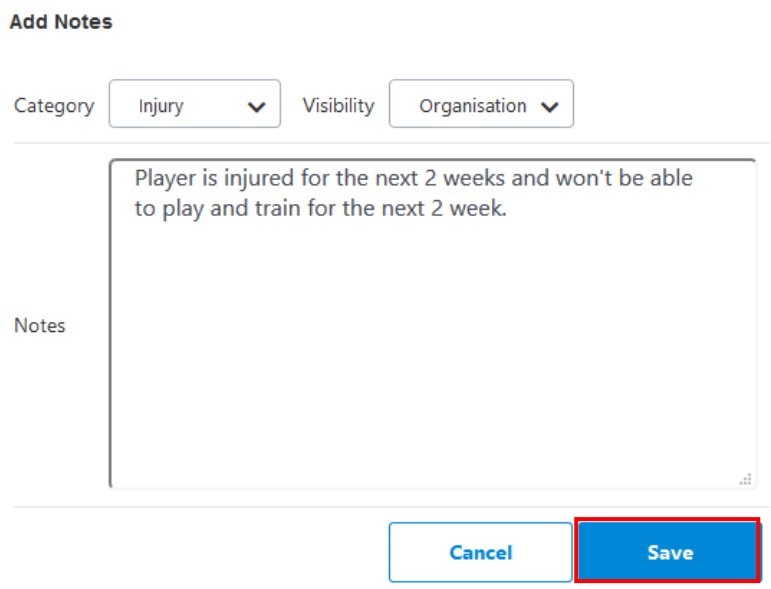



**2nd step:** "Category" – Select the main topic of the note.

**3rd step:** "Visibility" – Select who can view the note.

- **Organisation:** means every club administrator will be able to see the note.
- **Participant:** the participant will be able to see the note.
- **Governance:** parents organisations will be able to see the note.

**4th step:** "Notes" – Write the note into the text box. And click on: "Save".



### 4.1.2.6 ACTIVITY / ROLES – TO SEE / ADD ROLE OF A PARTICIPANT

The "Roles" tab is a section where you can add a new role to a person record.

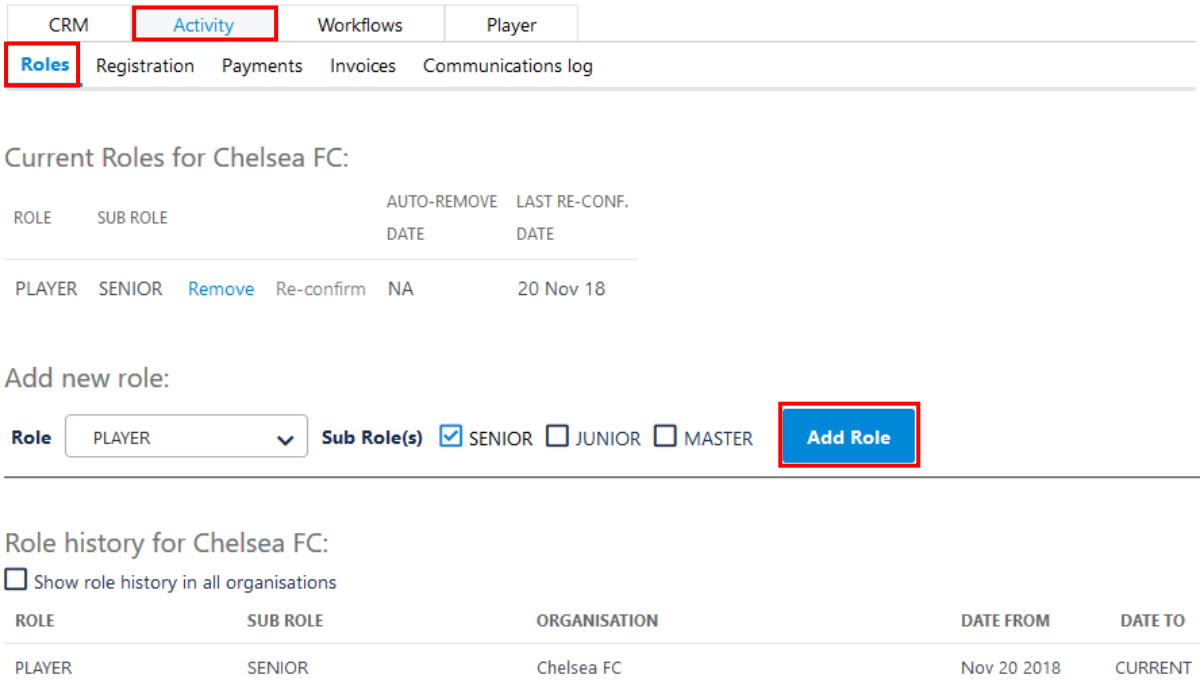
To add a new role, follow the steps below:

**1st step:** "Current Roles for The Club" – You can see all the roles the participant has with the club.

**2nd step:** "Add New Role" – Select the "Role" and "Sub roles" type. Then, click on the button "Add Role".

**3rd step:** "Role History for The Club" – You can see all the roles that person has ever had with the club.

- **Show Role History In All Organisations:** Tick the box if you want to see the registrant role history with other clubs



### 4.1.2.7 ACTIVITY / REGISTRATION – TO SEE THE REGISTRANT STATUS AND REGISTRATION HISTORY

The "Registration" tab is a section where you can see the registration history of a registrant. You can also add a new registration to a person record as well as decline pending registrations. Please note that once you have added a new registration, you still need to approve it on "Registration Management", explained on page 57.

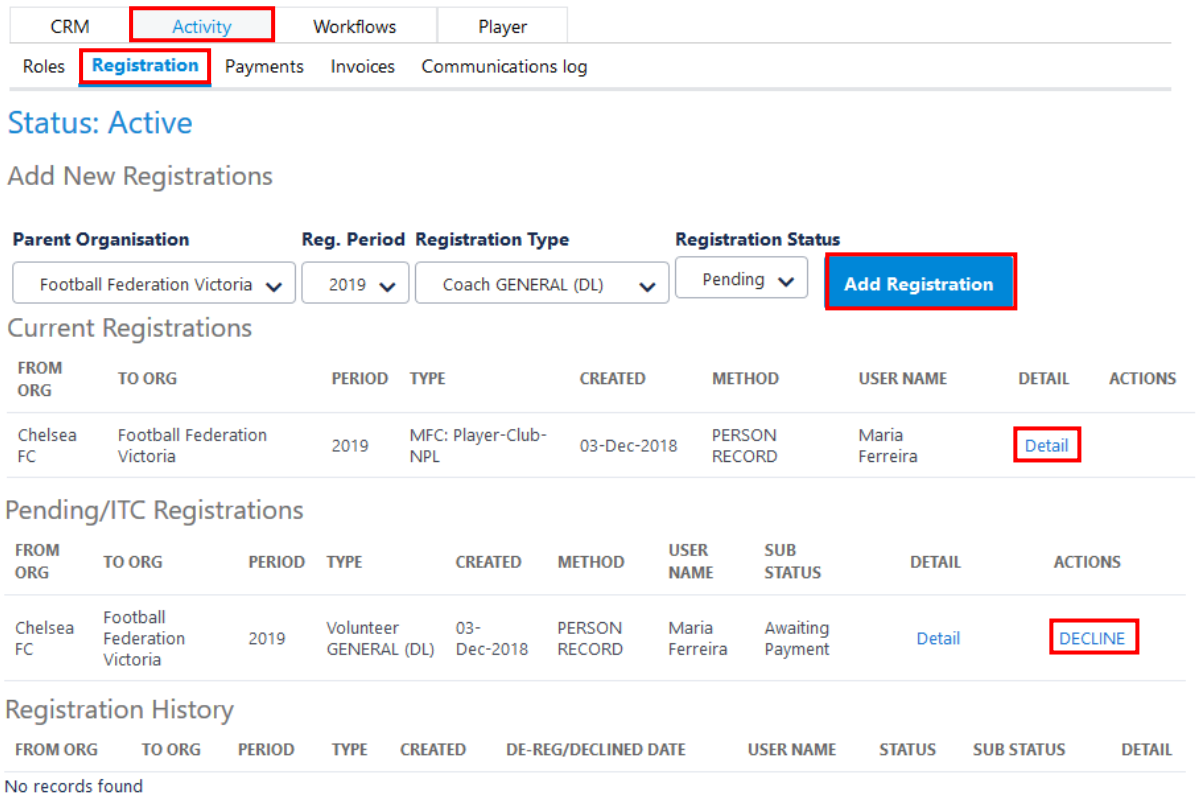
See below the steps of the "Registration" tab:

**1st step:** "Status" – You can see if the status of the participant is Active or Inactive.

**2nd step:** "Add Registration" – Select the "Parent Organisation", "Reg. Period", "Registration Type". Then, click on the button "Add Registration".

**3rd step:** "Pending / ITC Registrations" – Once you added a new registration, you can decline by clicking on "Decline" in blue. In order to accept a registration, you have to go into the "Registration Management" tab, explained on page 57.

**4th step:** "Detail" – Click on "Detail" in blue in order to see the transaction details of the registration.



### 4.1.2.8 ACTIVITY / PAYMENT – TO INPUT OFFLINE PAYMENT AND PAYMENT PLANS

The "Payment" tab allows clubs to manage offline payments and change their status to "paid" in order for their registration to be active. Also, it enables clubs to create payment plans for players who cannot pay their full fees at once.

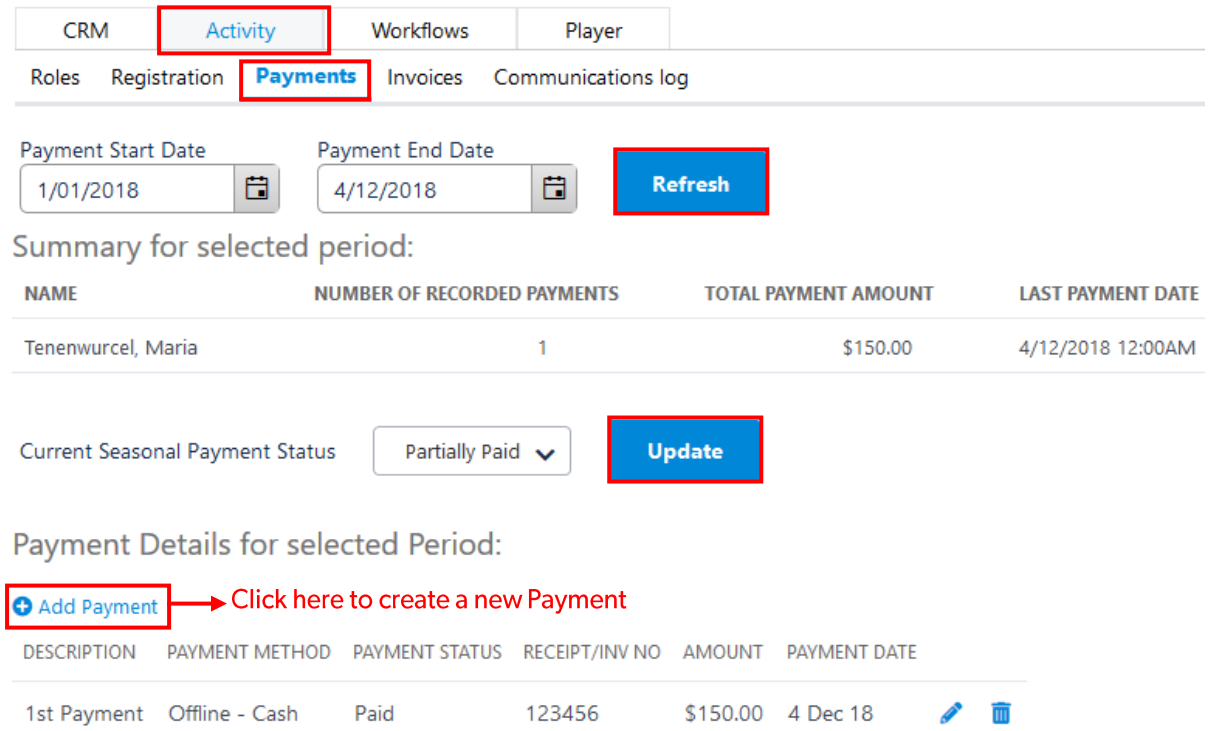
See below the steps of the "Payment" tab:

**1st step:** "Payment Start Date" and "Payment End Date" – Select the period that the payments were made. Then, click on "Refresh".

**2nd step:** "Summary for Selected Period" – Once you completed step 1, you will be able to see the summary of all payments during the selected period.

**3rd step:** "Current Seasonal Payment Status" – Select the payment status for each player who have paid offline.

**4th step:** "Add Payment" – Click on "Add Payment" in blue.



### 4.1.2.9 ACTIVITY / INVOICES – TO SEE THE INVOICE DETAILS OF THE REGISTRANT

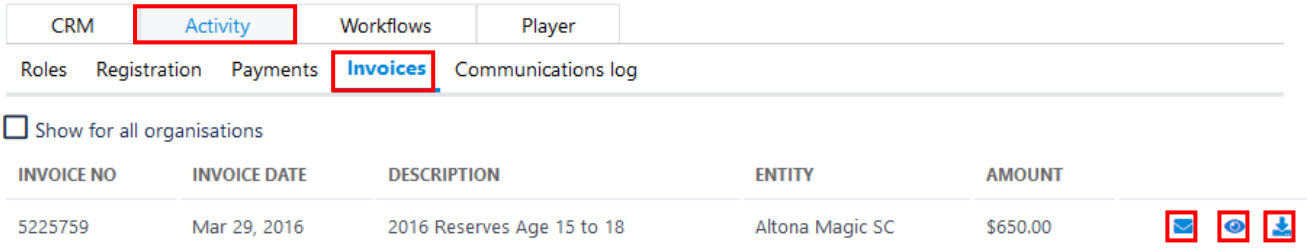
The "Invoices" tab allows clubs to see the invoice details of the registrant. Also, the club can email the invoice to their players directly from Play Football or download the invoice.

See below the steps of the "Invoices" tab:

**1st step:** "Envelope Icon" – To email the invoice directly from Play Football to the participant.

**2nd step:** "Eye Icon" – To view the invoice in full details.

**3rd step:** "Arrow Down Icon" – To download the invoice.



## 4.2 CONTACT DETAILS MANAGEMENT

## GO TO: PEOPLE ➡ CONTACT DETAILS MANAGEMENT

The "Contact Details Management" is used to search for a person and quickly edit there email address, home phone, mobile phone.

Use the available filtering criteria to search for a particular person. By clicking on the arrow you can narrow down the search even further by using tools from "Advanced Search".

**1st step:** "Role" – Select a role. "Any Role" relates to any person who have at least one role within the club while "No Role" relates to a person who has no roles within the club. For example: a past player or a parent.

**2nd step:** "Sub Role" – There are two types of sub role: "Any Sub Role" which includes all the sub roles within the selected "Role" or "Select Sub Roles" where you can select one or more sub roles to target a particular group. For example: To choose a senior player, select the option "Player" in the field "Role" and then select the option "Senior" in the field "Sub Roles".

**3rd step:** "Advanced Search Criteria" – Click on the arrow of the "Advanced Search Criteria" section to enable more detailed filtering. If you do not want to apply one of the advance serach criterias, leave the fields blank.

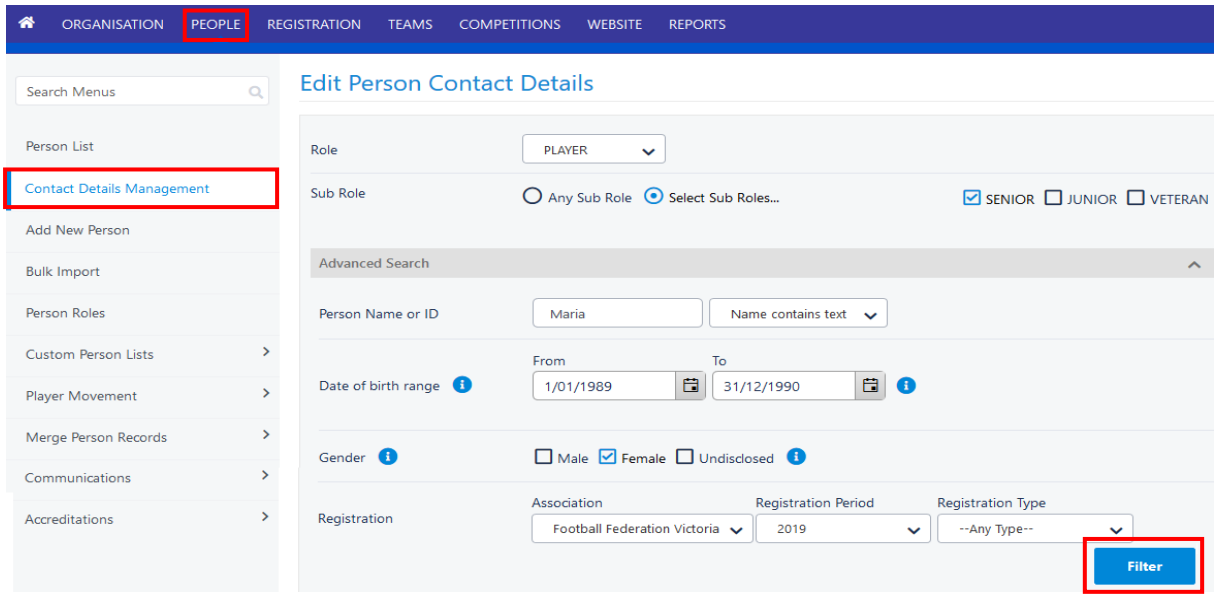
**4th step:** "Person Name or ID" – Enter the name or ID number to search for a particular person. This search will match both first and last names. You can also make a selection in the dropdown box relating to whether the name starts with, ends with or contains the entered text.

**5th step:** "Date of Birth Range" – Enter the date of birth "From"and "To", to target a particular age group.

**6th step:** "Gender" – Tick one or more boxes to choose the gender category.

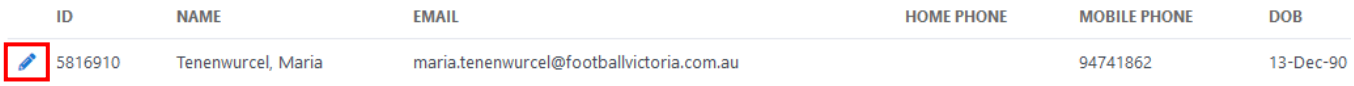
**7th step:** "Registration" – "Association", most clubs will be choosing the option "Football Victoria". However, if your club is under a regional association, you should choose the association option. Select the "Registration Period" and "Registration Type" options in order to narrow down information based on date of registration and registration type.

**8th step:** "Filter" – Click on filter to see the result of the search.



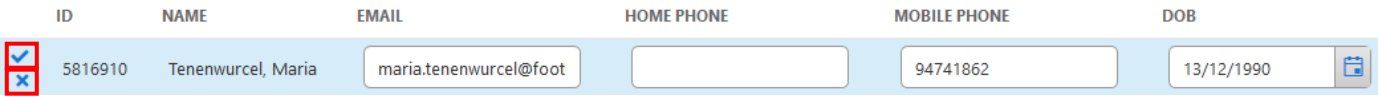
Once you press filter, the person record of one or more people will appear.

**9th step:** "Pencil Icon" – Click on the pencil icon to edit the email, home phone or mobile phone of the person record.



| ID | NAME | EMAIL | HOME PHONE | MOBILE PHONE | DOB |
|---|---|---|---|---|---|
| 5816910 | Tenenwurcel, Maria | maria.tenenwurcel@footballvictoria.com.au | | 94741862 | 13-Dec-90 |

**10th step:** "Confirm Change" – Once you made the changes, click on the "Tick" to complete the chages, or click on the "X"to cancel the changes.



| ID | NAME | EMAIL | HOME PHONE | MOBILE PHONE | DOB |
|---|---|---|---|---|---|
| 5816910 | Tenenwurcel, Maria | maria.tenenwurcel@foot | | 94741862 | 13/12/1990 |

## 4.3 ADD NEW PERSON

## GO TO: PEOPLE ➡ ADD NEW PERSON

A person record contains personal details of a specific person and it is recorded on Play Football. Please note that adding a new person, does not mean that this person is registered with the club. Once you add a new person, you need to assign them to a registration product.

### 4.3.1 ADD NEW PERSON MAIN PAGE

Before creating a new person record, search for the person in the search bar in order to avoid duplicates.

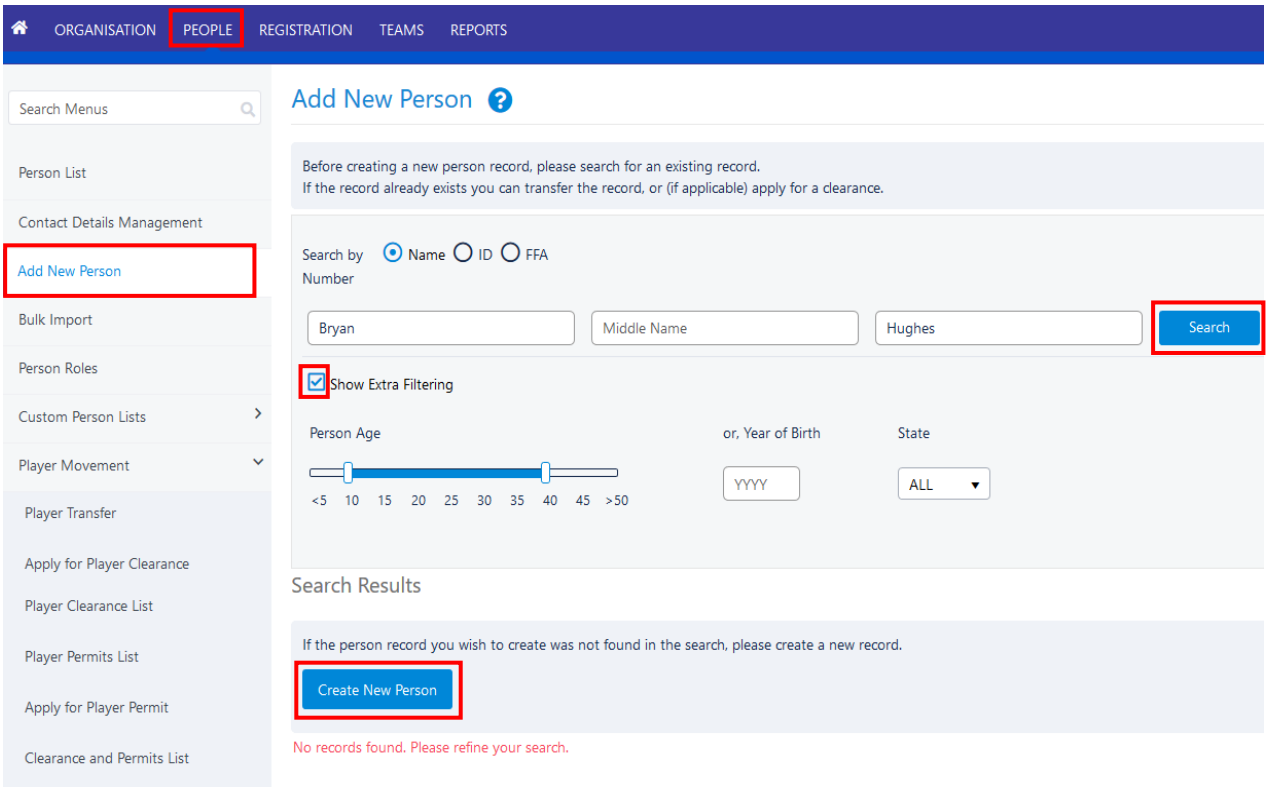
**1st step:** "Search by Number" – Choose if you want to search for a person record through name, ID or FFA number.

**2nd step:** "Show Extra Filtering" – If you want to conduct a more narrow search tick the box.

**3rd step:** "Person Age", "Year of Birthday", "State" – Select a age group or year of birthday and the state that the player is coming from to narrow the search. Please note, this information is not mandatory.

**4th step:** "Search" – Click on search once you have entered all the filters.

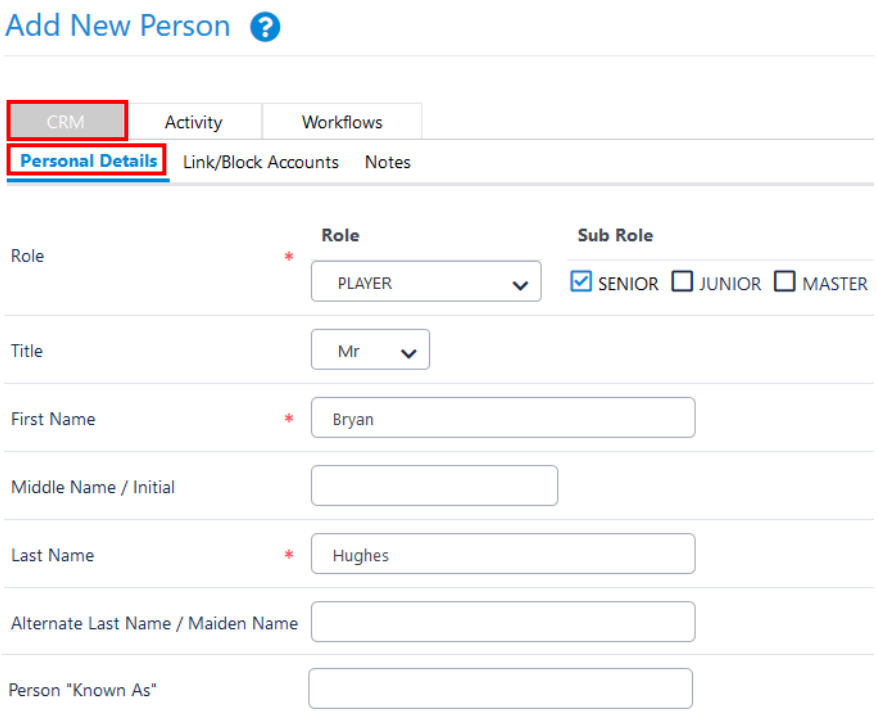
**5th step:** "Create New Person" – A list of records will come up. Please ensure that the details of the person record matches to the personal details of the person being registered. If no records are found, click on "Create New Person". Please note, that is preferable that the person being resgistered creates their own profile through the website www.playfootball.com.au.



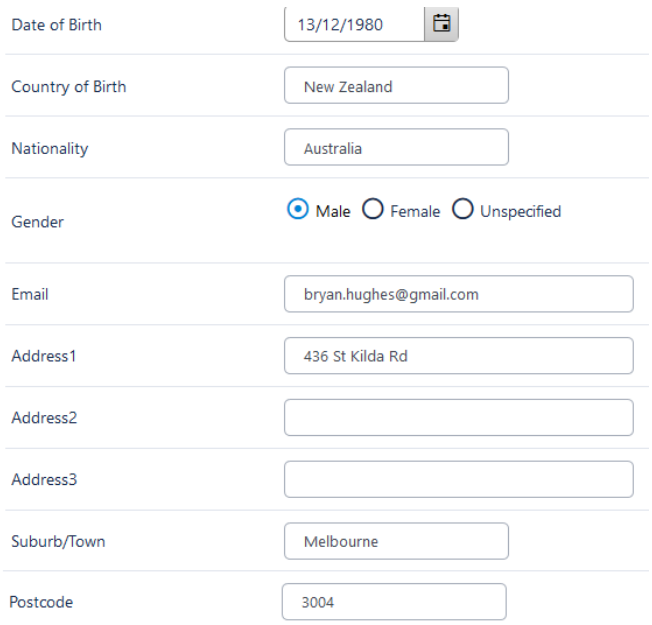
**6th step:** "CRM"and "Personal Details" – Make sure you are on the "CRM, Personal Details" tab, which will allow you to enter the main details of the person record.

**7th step:** "Role"– Select the main role of the person within the club. If the person has more than one role with the club, you will be able to add other roles later on, see on page 28 or page 37 to change/add roles in bulk.

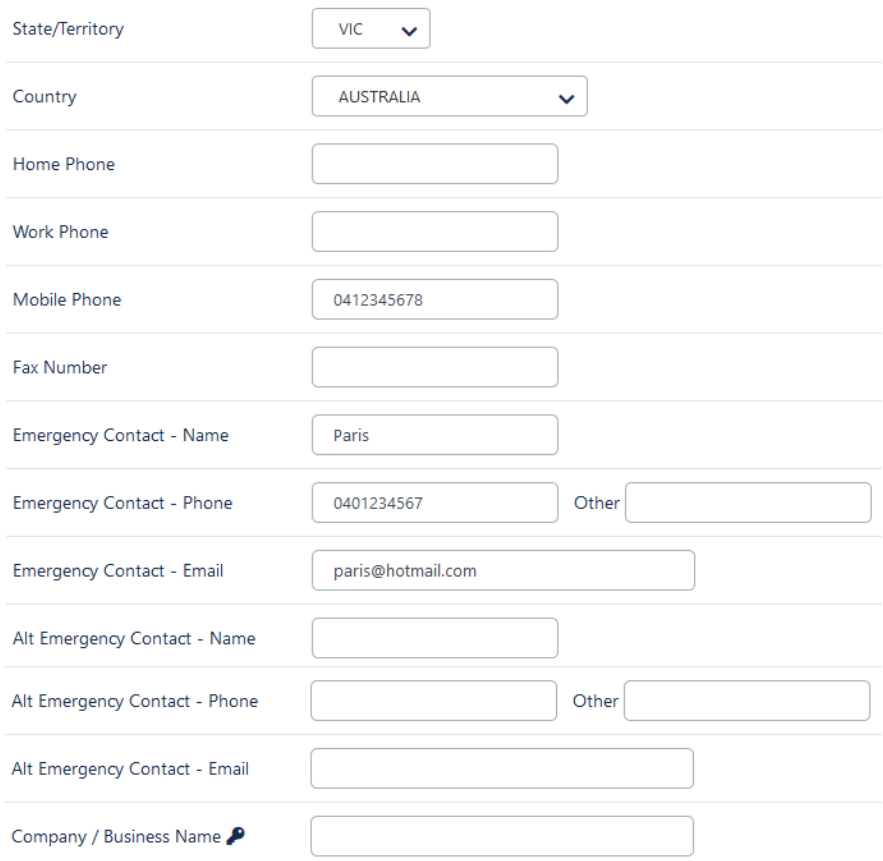
**8th step:** "First Name"and "Last Name"– Insert the first name and last name of the new person. It is also important to fill non mandatory fields, to distinguish the person record from others.




**9th step:** "Date of Birth", "Country of Birth", "Nationality", "Gender", "Email", "Address 1", "Address 2" "Address 3", "Suburb/Town", "Postcode" – Enter the details for all the fields as most complete as possible.



**10th step:** "State/Territory", "Country", "Home Phone", "Work Phone", "Mobile Phone", "Fax Number", "Emergency Contact - Name", "Emergency Contact - Phone", "Emergency Contact - Email", "Alt Emergency Contact - Name", "Alt Emergency Contact - Phone", "Alt Emergency Contact - Email", "Company / Business Name" – Enter the details for all the fields as most complete as possible.



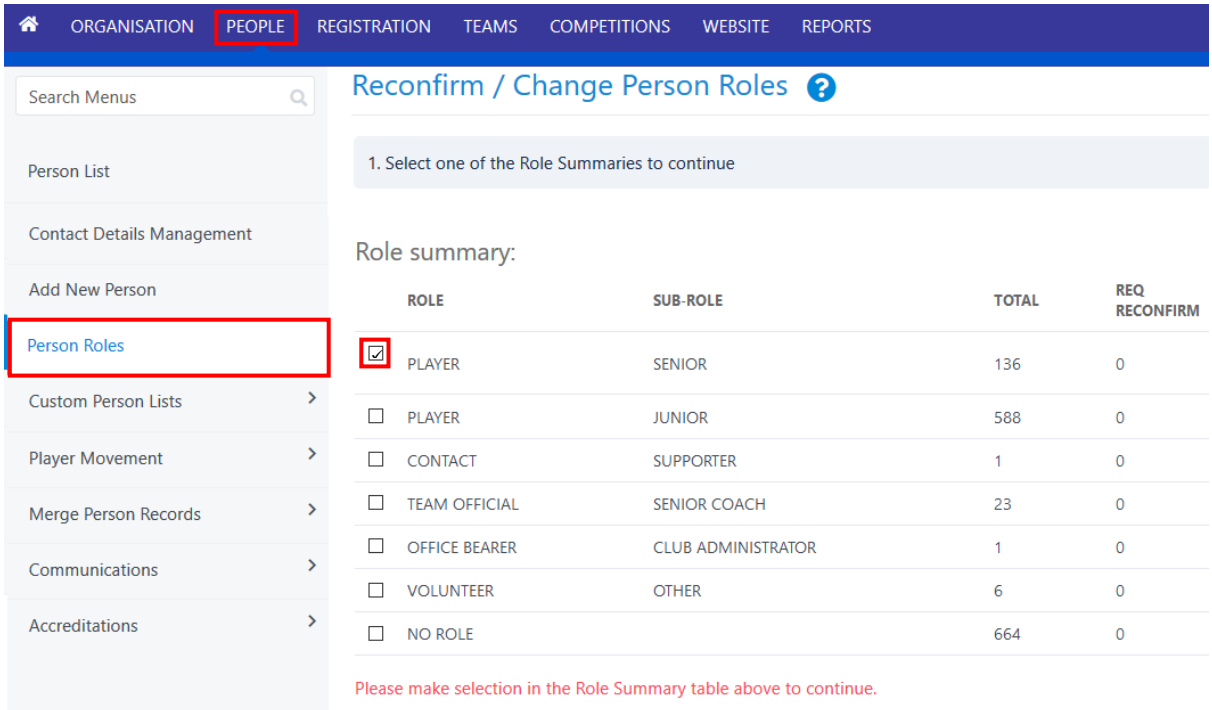

**11th step:** "Additional Information", "FFA No" and "Comment" – Enter the details for all the fields as most complete as possible. Once every step is completed, click on "Save".

## 4.4 PERSON ROLES

## GO TO: PEOPLE ➡ PERSON ROLES

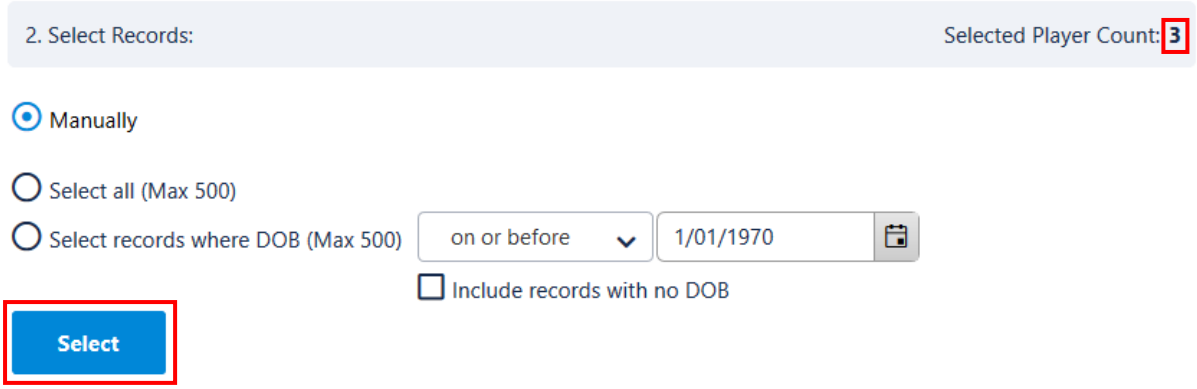
The person role tab is used to add or change the role of one or more person within the club. Follow the steps below to add a new role to a person.

**1st step:** "Role Summary" – Select the main role of the person that you want to add a new role.

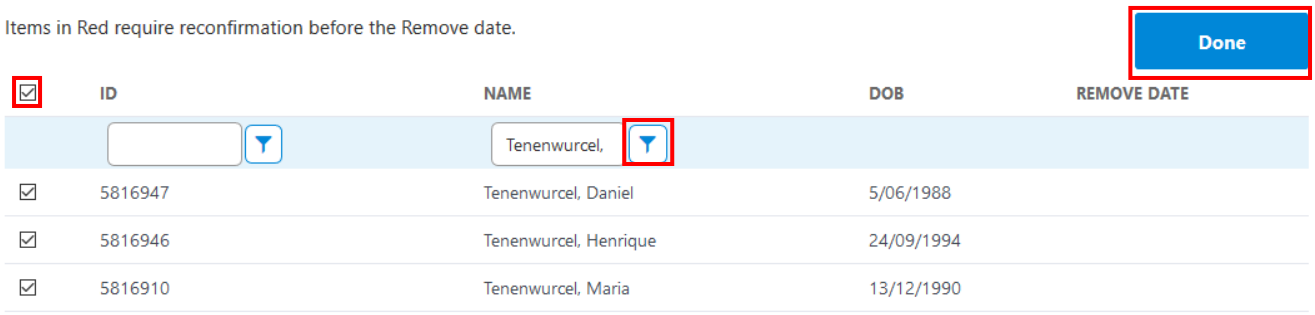



**2nd step:** "Select Records" – Select how you want to filter the people that needs their role changed. On the right corner, you can see how many people you have selected to have their roles changed.

- **Manually:** It will give you the option to select one or more people individually.
- **Select All (Max 500):** It will select all the people that are within the group that you selected in step 1.
- **Select Records Where DOB (Max 500):** It will select all people within a certain DOB.



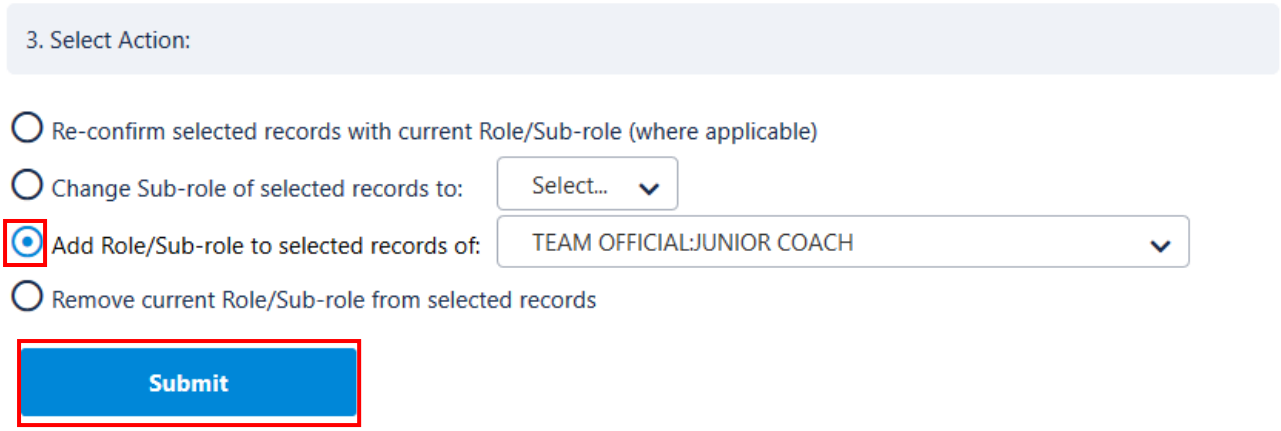
**3rd step:** "Manually" – Select who you want to change the role out of the list. You can filter by ID number or name. Tick the box to select people and then press done.




**4th step:** "Select Action" – Select the action you want to apply for the people you selected in the previous step.

- **Re-Confirm Selected Records With Current Role/Sub-Role:** This option is used to bulk re-confirm records, and simply marks the records as re-confirmed with the same role.
- **Change Sub-Role Of Selected Records To:** This removes the current sub-role, and replaces with the selected sub role.
- **Add Role/Sub-Role To Selected Records Of:** This adds the selected Role/Sub-role to the records, and leaves any existing roles intact. Note – this is the only option applicable when a selection of NO ROLES is made in Step 1.
- **Remove Current Role/Sub-Role From Selected Records:** This removes the current role.

**5th step:** "Submit" – Click on "Submit" to complete the action.



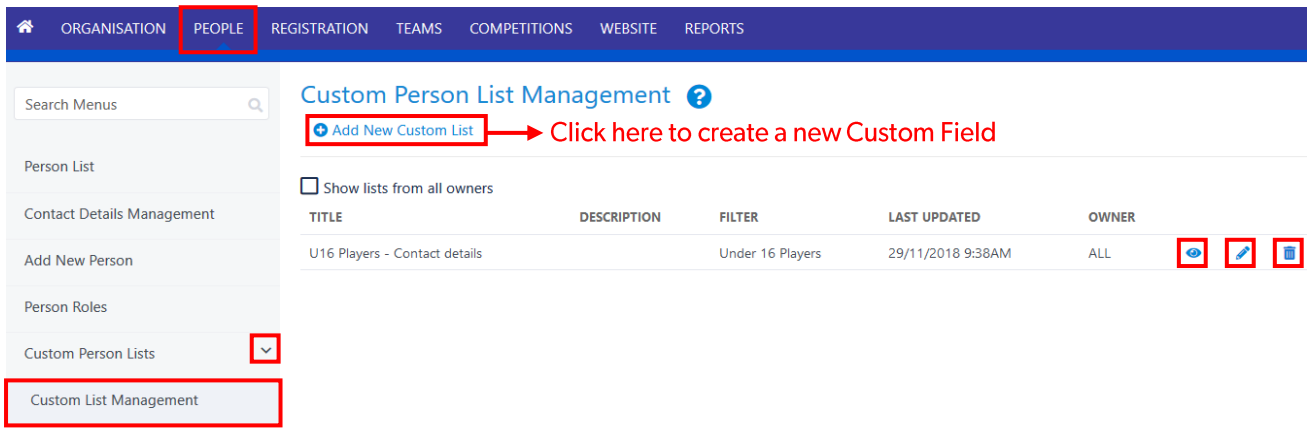
## 4.5 CUSTOM LIST MANAGEMENT

## GO TO: PEOPLE ➡ CUSTOM PERSON LIST ➡ CUSTOM LIST MANAGEMENT

Custom list management is used to create lists of people based on certain criteria. You can narrow down this list even further by filtering through "Custom Filters Management" on page 44. You can also add/remove fields in order to only have specific information displayed.
For example: create a list of players that only contains columns with FFA number, full name and DOB.

### 4.5.1 CUSTOM LIST MANAGEMENT MAIN PAGE

In this page, you can see all the lists that have been set up by the club. Also, you can view the list by clicking on the eye icon, you can edit each list by clicking on the pencil icon or delete lists by clicking on the bin icon.



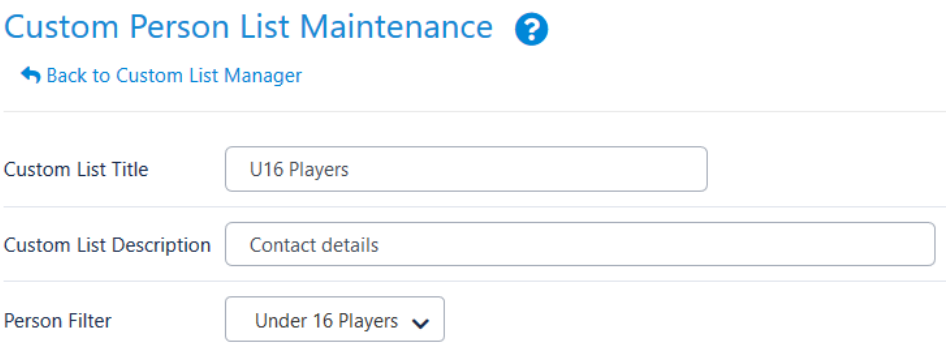

### 4.5.2 ADD NEW CUSTOM LIST – TO CREATE A NEW PERSONALISED LIST OF PEOPLE

Follow the steps to create a new "Custom List"

**1st step:** "Custom List Title" – This is for internal reference. It will be the name used to identify and differentiate all list on the main "Custom List" page.

**2nd step:** "Custom List Description" – If you want to add any further detail to describe the list.

**3rd step:** "Person Filter" – Optionally, select a "Person Filter" described on page 44, which has previously been created. If a filter is applied, this will reduce (filter) the number of persons displayed in the list according to the criteria specified in the person filter. If a filter is not applied, it is equivalent from selecting those with any role within your club.

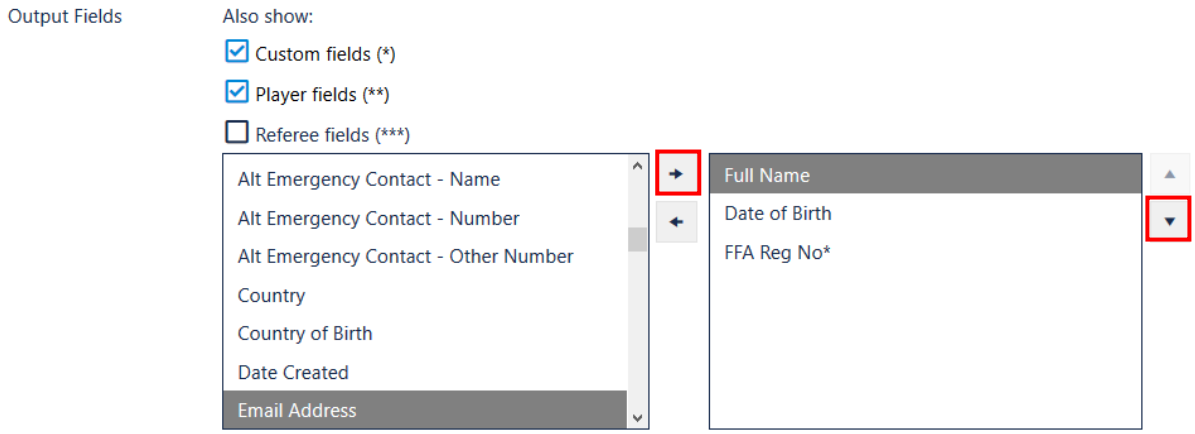


**4th step:** "Output Fields" – Select one or more "Output Fields" by clicking on the field name in the field list on the left, and then click on the arrow -> button. Fields can be removed by clicking on the field name in the field list on the right, and then click on the arrow <- button.

These selections affect which fields (data columns) appear in the "Custom List". Click on the arrow up or arrow down buttons to determine the order in which the columns will appear in the list. However, any "Custom Fields" selected will always be displayed as the last columns of the custom list.

There is a limit of 20 columns that can be added to a custom list.

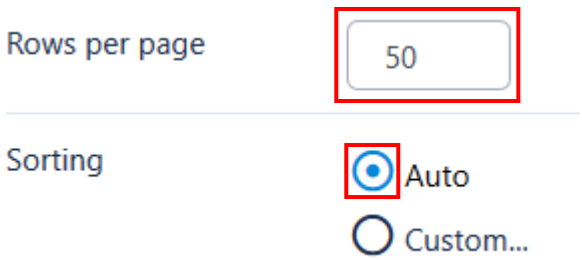
- **Custom Fields:** Custom Fields are the additional questions created by the club or by a parent organisation.
- **Player Fields:** These are certain fields that apply specifically to player roles.
- **Referee Fields:** These are certain fields that apply specifically to referee roles.




**5th step:** "Rows per Page" – Enter the quantity of person record you would like to appear per page from 10 to 100 records. If more person records than the quantity input appears in the list, the person records will be split into pages.

**6th step:** "Sorting" – Select "Sorting" type.

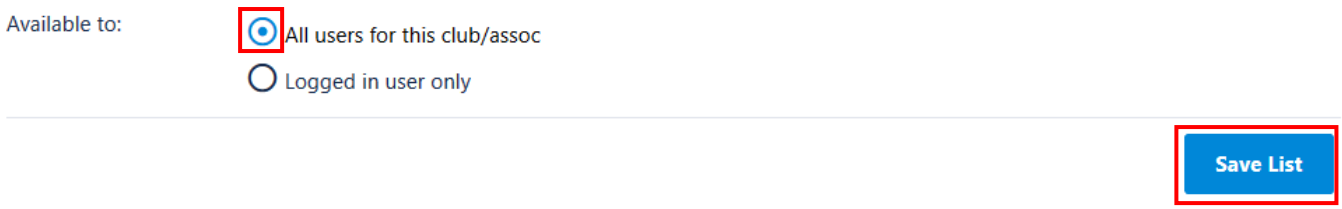
- **Auto:** Means that each column in the list can be sorted by clicking on the column heading of the list.
- **Custom:** Means that you can select the sort order for the columns of the list. The list will first be sorted through the primary column, followed by the secondary and then the tertiary columns. In this option, the sort order cannot be changed while using the list.



**7th step:** "Available To" – Select who can access the list.

- **All Users For This Club/Association:** Means that anyone who has administrative access to the club will be able to access the list.
- **Logged In User Only:** Only the person who created the list have access to that list.

**8th step:** "Save List" – Click on "Save List" to complete and create the list.



## 4.6 CUSTOM FIELDS MANAGEMENT

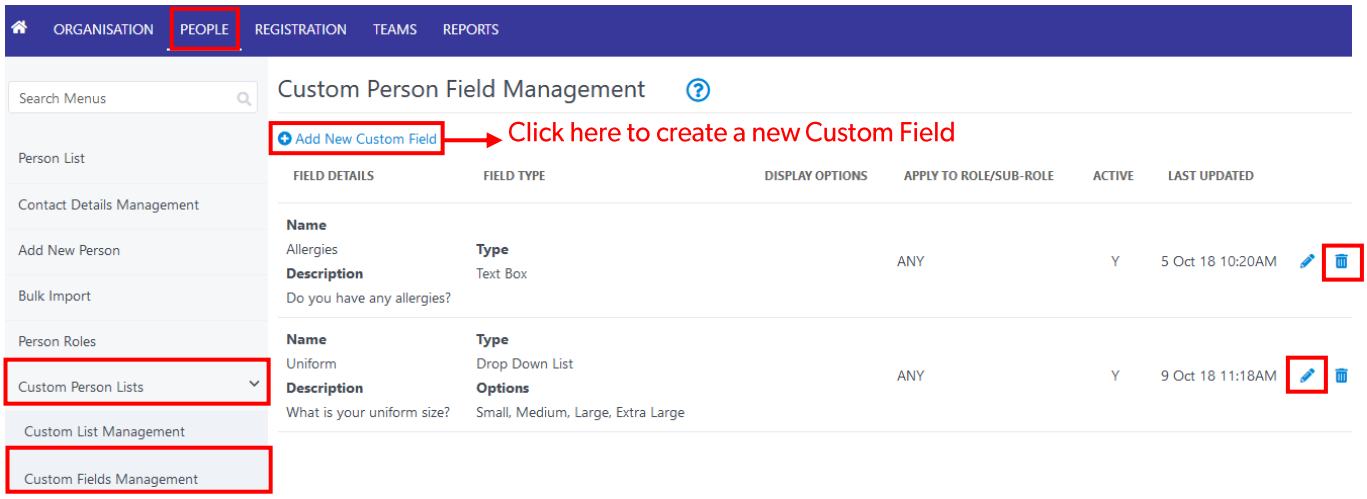
## GO TO: PEOPLE ➡ CUSTOM PERSON LIST ➡ CUSTOM FIELDS MANAGEMENT

Custom fields allow the club to create additional questions in order to capture extra information that is not available on the standard sign up form. The new additional question created in the "Custom Fields Management" section, will be redirected to the "Other Fields" section of each signup form. From there, the club will have the choice to add it to a form or not. For further instructions go to "Signup Form Management" section on step 13 of the page 67.

On the Custom Person Field Management screen, you can add, edit and delete a question.

### 4.6.1 CUSTOM FIELDS MANAGEMENT MAIN PAGE

In this page, you can see all the customised questions created by the club. Also, you can edit and delete the created question by selecting the pencil and bin icons.




### 4.6.2 ADD NEW CUSTOM FIELD – TO CREATE A NEW CUSTOM FIELD

Follow the steps to create a new "Custom Field":

**1st step:** "Name" – This is for internal reference and can be use to categorise questions into groups. The name will not appear for registrants.

**2nd step:** "Description" – This is the question that will appear for the registrant in the form.

**3rd step:** "Type" – You can select the format of each question. You can choose different formatting types, such as: Text Box, Down List, Radio Button List, CheckBox List, Date Entry, Email Entry, Long Description, Number. For example: a text box is a blank field where the registrant can write any information. A drop down list is a field where the registrant can select an answer among a set of options.

**4th step:** "Options" – If you choose the "Type", as one of the following: Drop Down List, Radio Button List or CheckBox List, you will be require to enter the options that will appear for selection in the field. Options must be separated by commas and without spaces. For example: S,M,L,XL

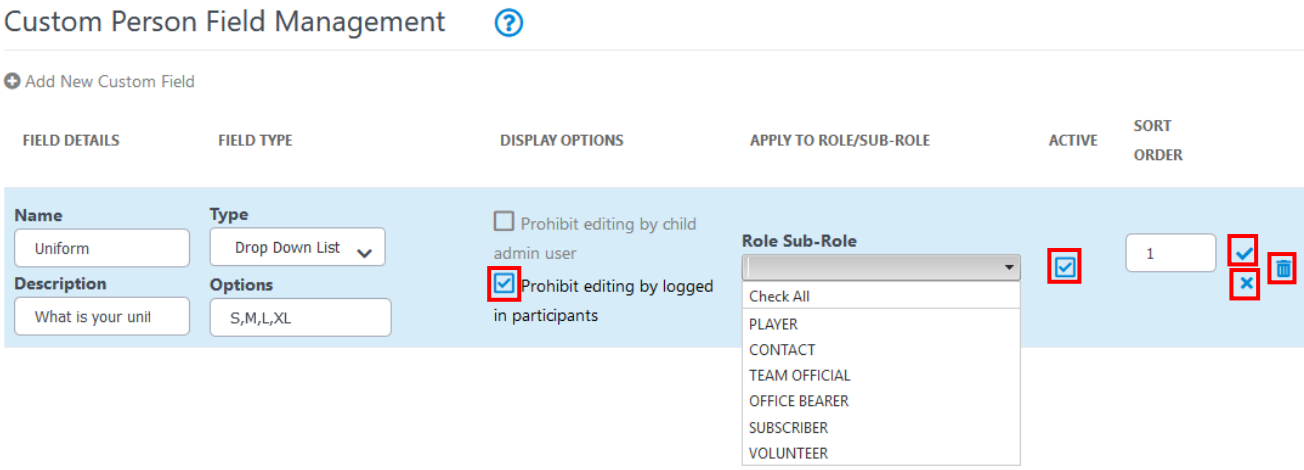
**5th step:** "Prohibit Editing by Logged in Participants" – Once the registrant completes the registration, they will not be able to edit the information later on.

**6th step:** "Role Sub-Role" – If you select a specific role, this will make the question available only to person records that have that role. For example: the question will only be asked to people who has a player role.

**7th step:** "Active" – You can make the question active or inactive. If the question is inactive you will not be able to use the question in your form.

**8th step:** "Sort Order" – You can rank the order that the questions will be displayed on the main "Custom Fields Management" page. For example: if you want a question to be the 1st question displayed in the main page, you enter the number 1.

**9th step:** "Confirm, Cancel and Delete" – The tick icon will confirm and save the new question, the x icon will cancel the submission and the bin icon will delete the field.



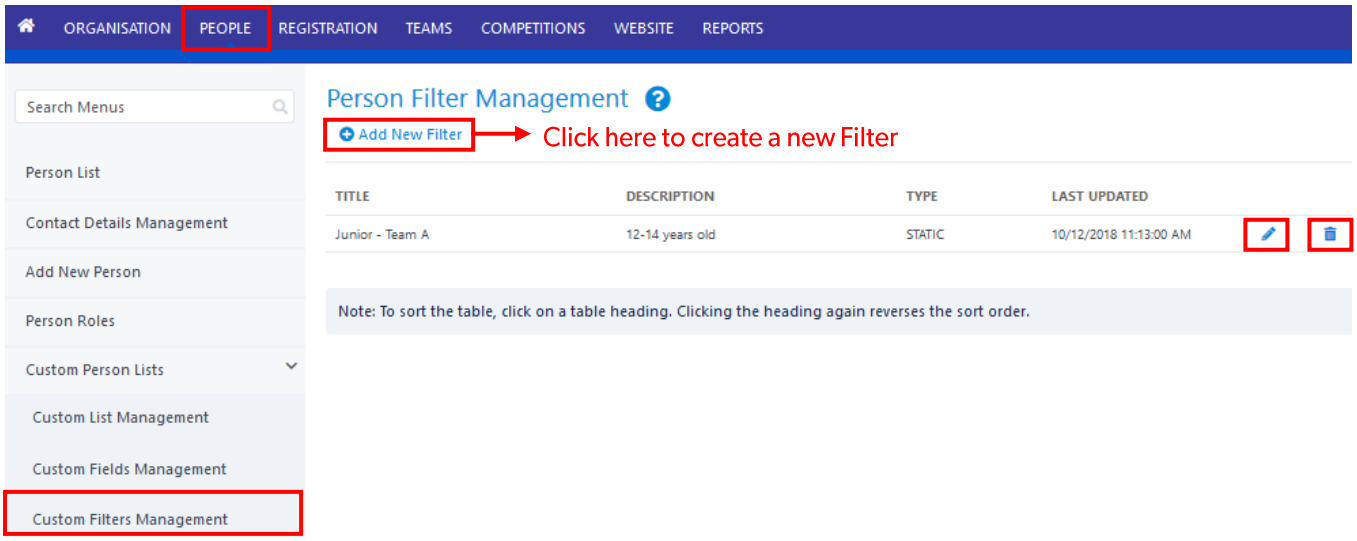
## 4.7 CUSTOM FILTERS MANAGEMENT

## GO TO: PEOPLE ➡ CUSTOM PERSON LIST ➡ CUSTOM FILTERS MANAGEMENT

Custom fields allow the club to create personalised lists including a specific group of people. You can use those lists to send bulk emails and SMS. Also, you can download customised reports by linking this list to the "Custom List Management" section, explained on page 39.

### 4.7.1 CUSTOM FILTERS MANAGEMENT MAIN PAGE

In this page, you can see all the filters that have been set up by the club. Also, you can edit each list by clicking on the pencil icon or delete lists by clicking on the bin icon.

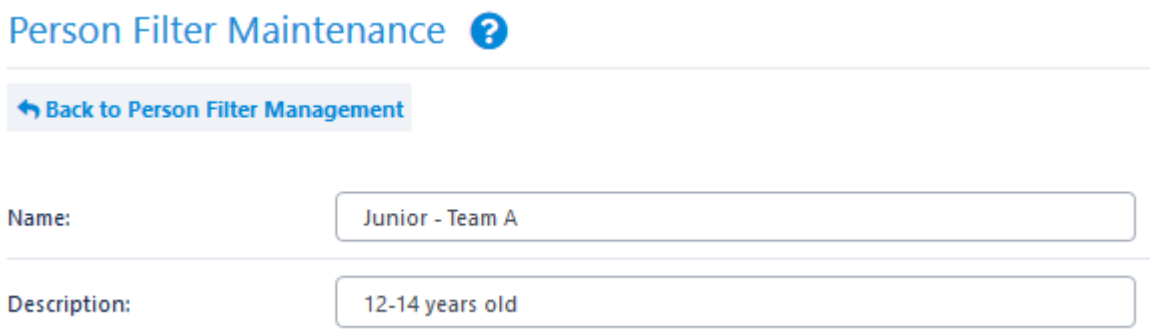



### 4.7.2 ADD NEW FILTER – TO CREATE A NEW FILTER OF PEOPLE

Follow the steps to create a new "Filter"

**1st step:** "Name" – Enter a name to differentiate filters.

**2nd step:** "Description" – Enter a description for the filter.



**3rd step:** "Filter Type" – Select the filter type. This will affect on how you will select the people that will be part of the list.

- **Static:** The "Static"filter will alllow you to enter people into the list, selecting one by one. As a result, it is a better way to customise your group of people.
- **Dynamic:** The "Dynamic"filter will give you a group of people according to the criteria selected by you, such as role, DOB, gender, etc. This option won't allow you to select the group of people one by one.

See bellow the detailed explanation of each "Filter".

### 4.7.2.1 FILTER TYPE – STATIC

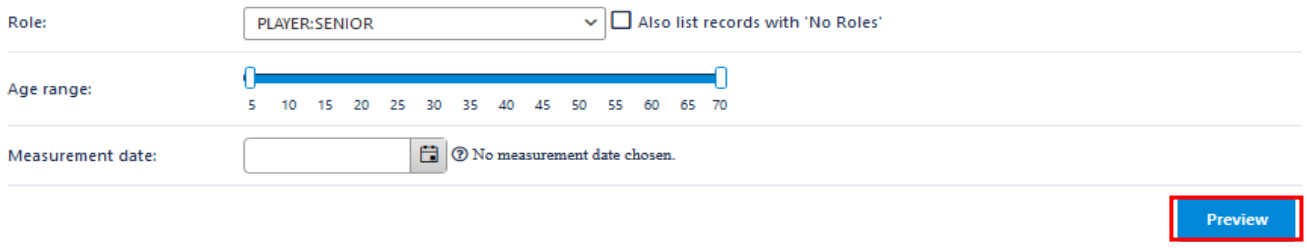
If you selected the option "Static", follow the steps below:

**1st step:** "Role" – Select the"Role" of the participants you want to add into your list.

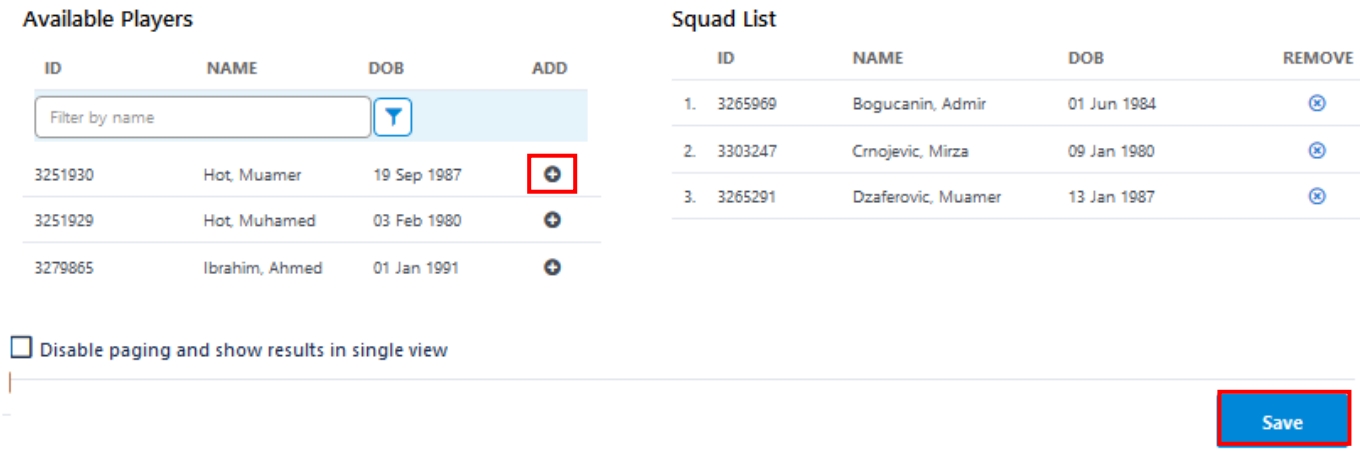
**2nd step:** "Age Range" – Select the "Age Range" of the participants you want to add into your list.

**3rd step:** "Measurement Date" – Select the "Measurement Date".

**4th step:** "Preview" – Click on "Preview". Clicking on "Preview", will provide you with a list of people according to your previous criteria. From then, you will be able to add each person to your own group of people.




**5th step:** "Available Players" – Those are the people populated according to your selected criteria. To add each person to your own squad list, search for their name in the filter bar, and then click on the plus icon. You will note that their name will move to the squad list area. The list will only be created, once you click on "Save".



### 4.7.2.2 FILTER TYPE – DYNAMIC

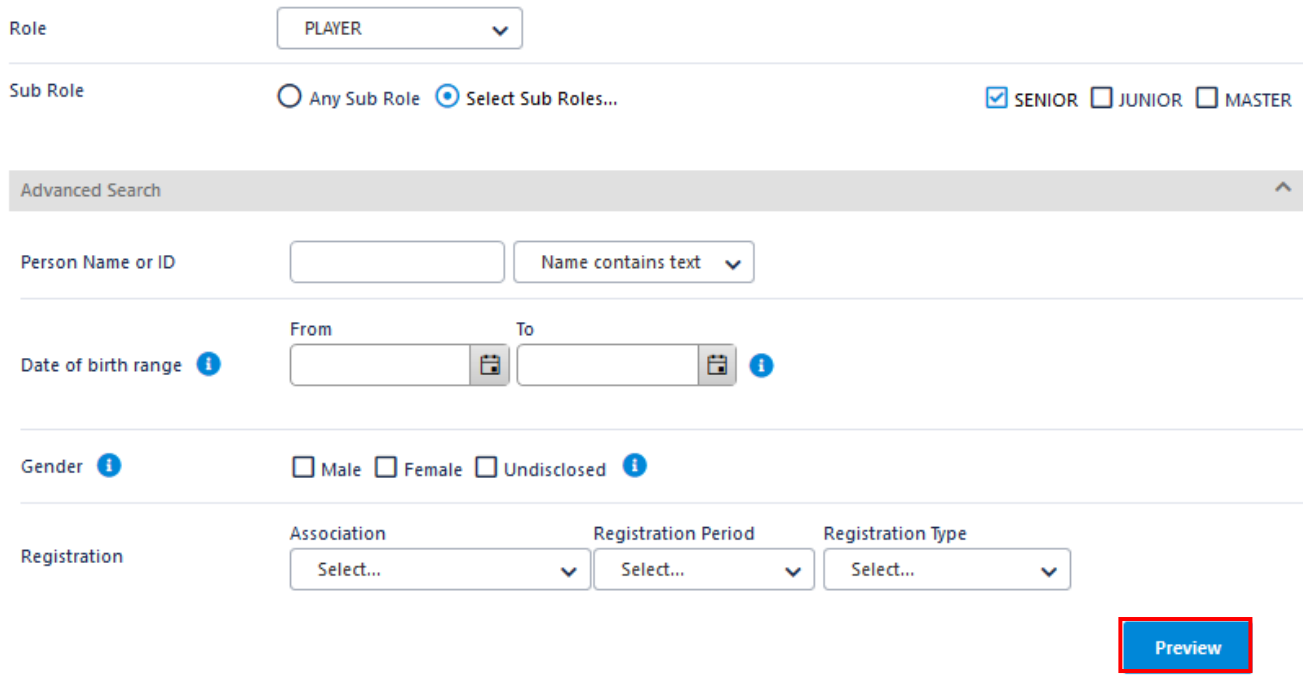
If you selected the option "Dynamic", follow the steps below:

**1st step:** "Role" and "Sub Role" – Select the "Role" and "Sub Role" to populate a list of people according to your criteria.

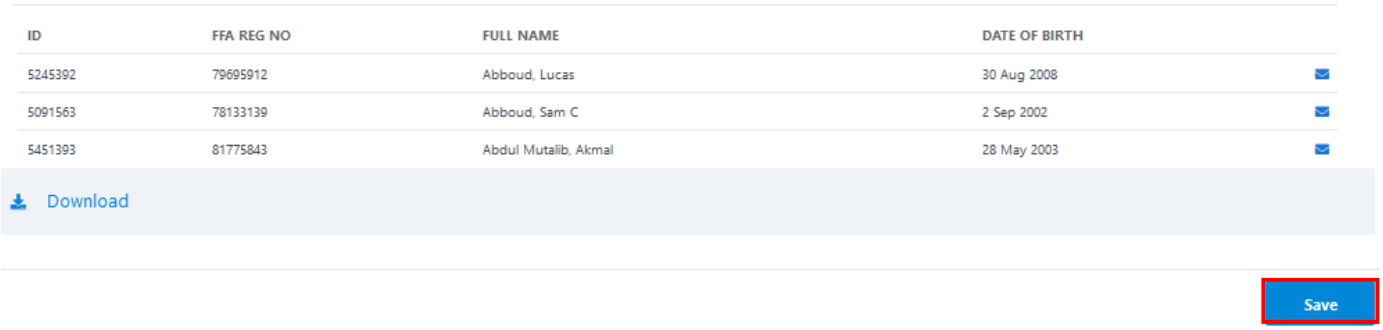
**2nd step:** "Advanced Search" – You can use the following filters to populate a list of people according to your criteria.

- **Person Name or ID:** Enter "Person Name" or "ID" to filter a specfic person.
- **Date of Birthday Range:** Select the date of birthday range if you want to filter a particular age group.
- **Gender:** Select the gender, If you want to filter a particular gender.
- **Registration:** Choose a specfic group by selecting the "Registration Period"and "Registration Type".

**3rd step:** "Preview" – Click on "Preview". Clicking on "Preview", will provide you with a list of people according to your previous criteria.




**4th step:** "List of people" – Those are the people populated according to your selected criteria. You can email each person directly from the list. In addition, you can download a file with all people within your list. The list will only be created, once you click on "Save".



## 4.8 EMAIL PEOPLE

## GO TO: PEOPLE ➡ COMMUNICATIONS ➡ EMAIL PEOPLE

The club can compose an email to any individual or a group of people registered with your club, who have a valid email address entered. This section allows the club to filter people according to different roles. For example: if you want to email the coaches at your club to notify them that the club will be running coaching development courses next week, you can send a bulk email to all coaches at once.

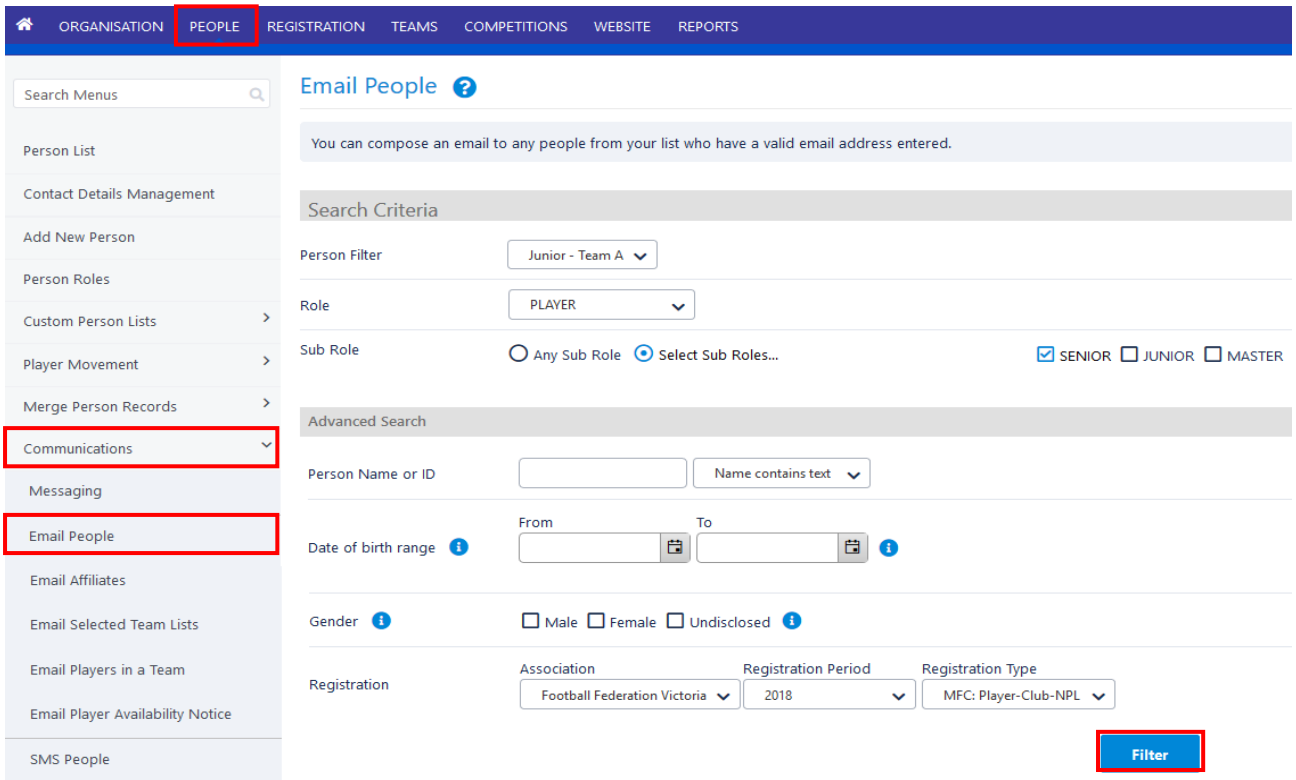
To send an email to a group of people or an individual, follow the steps below:

**1st step:** "Person Filter" – This is a list of people that you have pre-set on the "Custom Filters Management" tab, explained on page 44. For example: if you want to email only players from a specific team. Otherwise, you can find people by using the filters options under "Search Criteria" and "Advanced Search".

**2nd step:** "Search Criteria" and "Advanced Search" – You can filter to find a group of people or an individual that you would like to email.

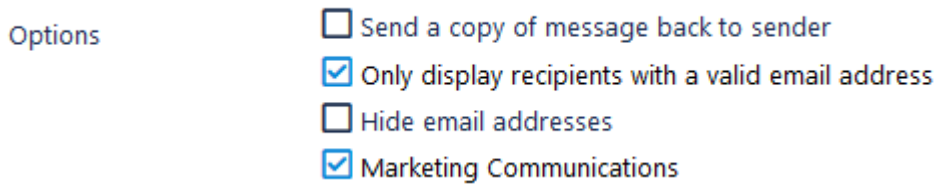
- **Role and Sub Role:** Select the role of the group you would like to email.
- **Person Name or ID:** Enter "Person Name" or "ID" to find and email a specific person.
- **Date of Birthday Range:** Select the date of birthday range if you want to email a particular age group.
- **Gender:** Select the gender, If you want to email a particular gender.
- **Registration:** Choose a specfic group by selecting the "Registration Period"and "Registration Type".

**3rd step:** "Filter" – Click on "Filter" in order to populate the group of people that you are going to email according to the criteria you have selected.



**4th step:** "Options" – Select different settings to apply to the email the club is sending.

- **Send a Copy of Message Back to Sender:** Tick this box, if you want to send a copy of the email in your own email address.
- **Only Display Recipients With a Valid Email Address:** When you tick this box, only registrants who have a valid email will be displayed in the sent list section.
- **Hide Email Addresses:** Tick this box to hide all the email addresses, so the recipients will not see each other emails.
- **Marketing Communication:** Tick this box, if this is a marketing communication from your club.



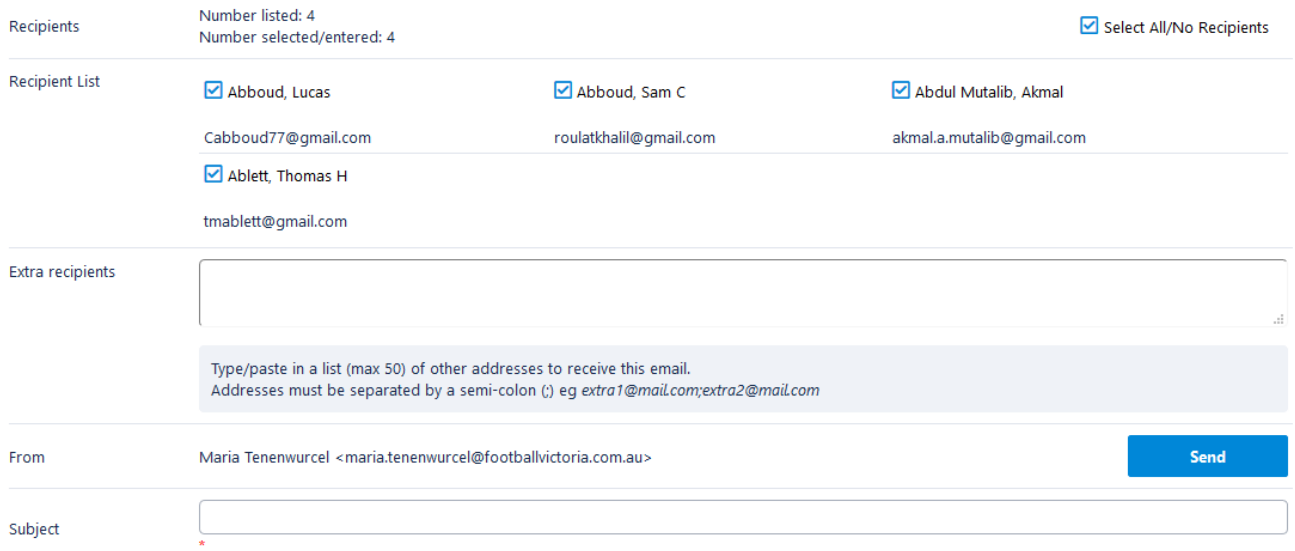

**5th step:** "Recipients" – You can see the amount of people who has been selected to receive the email. Also, you can tick the box "Select All/No Recipients", in order to select in bulk all individuals according to your filter selection.

**6th step:** "Recipient List" – You can see all the recipients names and their emails. Also, you can tick or untick one by one in order to select who will be receiving the email.

**7th step:** "Extra Recipients" – Add extra email addresses to email people who is not part of the selected list.

**8th step:** "From" – This is the email that will appear as a "Sender". All email replies will be sent back to this email. The email address that will appear in this section is linked to the person who is logged on the Play Football account.

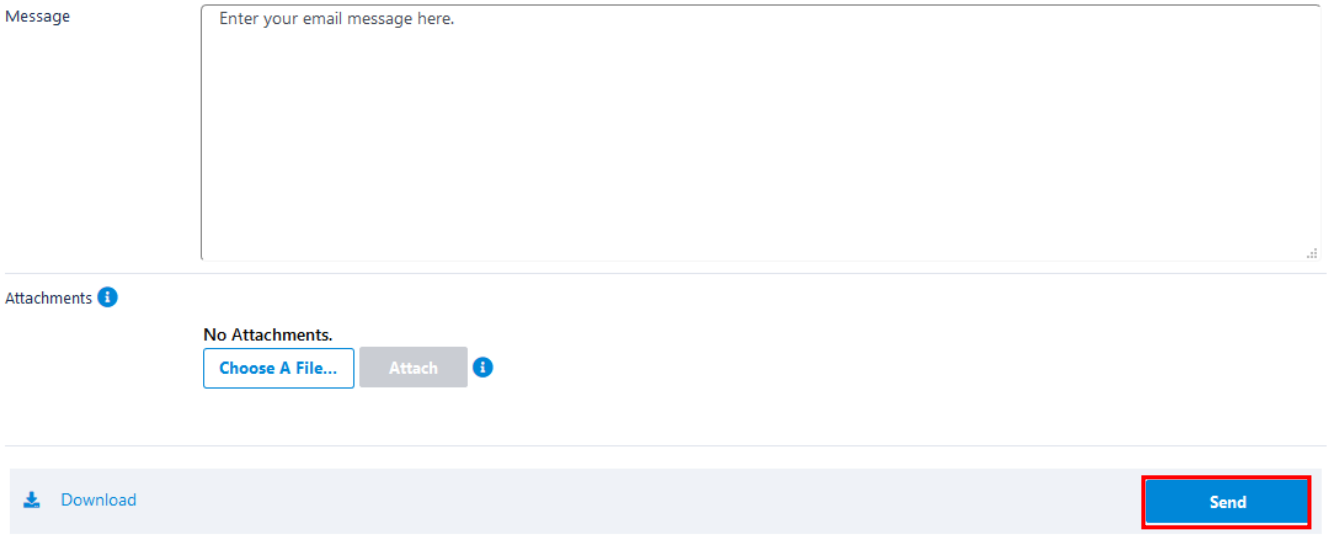
**9th step:** "Subject" – Enter the subject of the email.



**10th step:** "Message" – Enter the email message.

**11th step:** "Attachments" – Add an attachment to your email by clicking on "Choose a File" and then click on "Attach".

**12th step:** "Send" – Click on "Send" to send the email.



## 4.9 SMS PEOPLE

**GO TO: PEOPLE → COMMUNICATIONS → SMS PEOPLE**

The club can send a SMS to any individual or a group of people registered with your club, who have a valid mobile phone entered. This section allows the club to filter people according to different roles. For example: if you want to SMS team players due to a training being cancelled, you can send a bulk SMSs to all players at once.

This is not a free service and the service is provided by InteractSport. If you have any issues with SMS, please contact InteractSport directly. To buy credits go to the "Purchase SMS Credits" tab, explained on page 53.

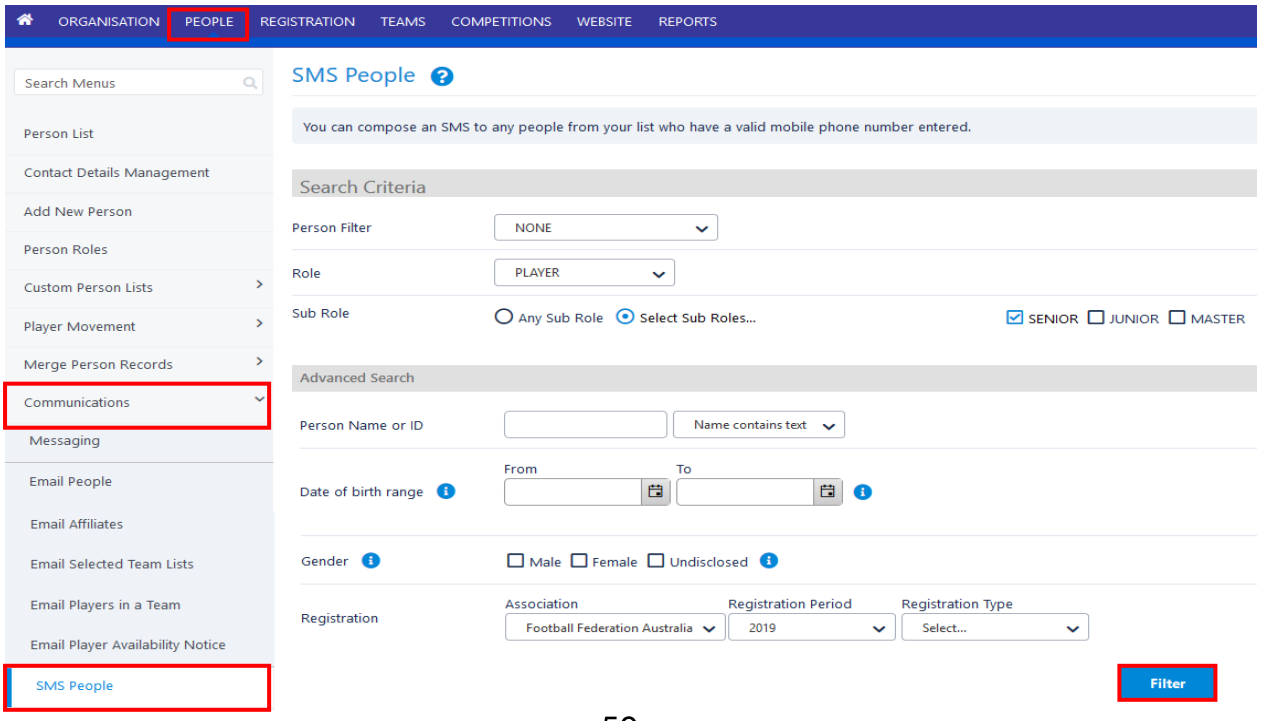
To send an SMS to a group of people or an individual, follow the steps below:

**1st step:** "Person Filter" – This is a list of people that you have pre-set on the "Custom Filters Management" tab, which is explained on page 44. For example: if you want to SMS only players from a specific team. Otherwise, you can find people by using the filters options under "Search Criteria" and "Advanced Search".

**2nd step:** "Search Criteria" and "Advanced Search" – You can filter to find a group of people or an individual that you would like to SMS.

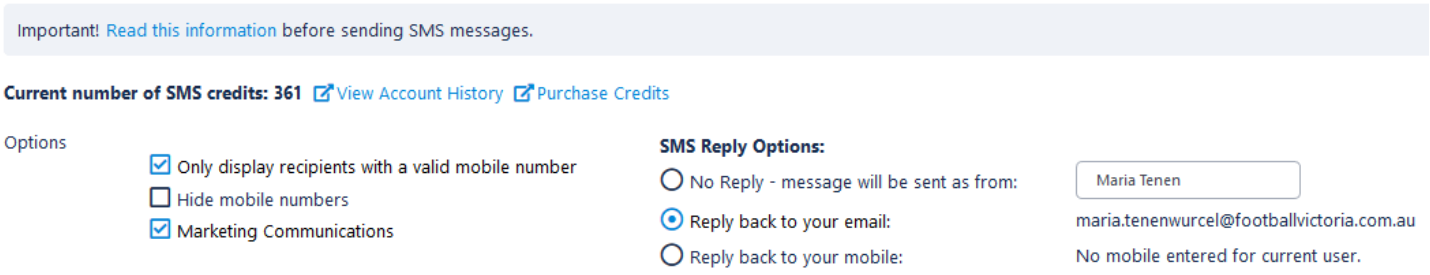
- **Role and Sub Role:** Select the role of the group you would like to SMS.
- **Person Name or ID:** Enter "Person Name" or "ID" to find and SMS a specific person.
- **Date of Birthday Range:** Select the date of birthday range if you want to SMS a particular age group.
- **Gender:** Select the gender option, if you want to SMS a particular gender group.
- **Registration:** Choose a specfic group by selecting the "Registration Period"and "Registration Type".

**3rd step:** "Filter" – Click on "Filter" in order to populate the group of people that you are going to SMS according to the criteria you have selected.



**4th step:** "Options" – Select different settings to apply to the SMSs that the club is sending. You can also see how much credits the club have available.

- **Only Display Recipients With a Valid Mobile Number:** When you tick this box, only registrants who have a valid mobile number will be displayed in the sent list section.
- **Hide Mobile Numbers:** Tick this box to hide all the mobile numbers, so the recipients will not see each other numbers.
- **Marketing Communication:** Tick this box, if this is a marketing communication from your club.
- **Sms Reply Options:**
    - **No Reply – Message Will Be Sent As From:** This option won't allow the person to reply to the SMS. You can add a signature, so they know who sent the message.
    - **Reply Back To Your Email:** If the person replies to the SMS, you will receive the reply on your own email.
    - **Reply Back To Your Mobile:** If the person replies to the SMS, you will receive the reply on your mobile number.



**5th step:** "Recipients" – You can see the amount of people who has been selected to receive the SMS. Also, you can tick the box "Select All/No Recipients", in order to select in bulk all individuals according to your filter selection.

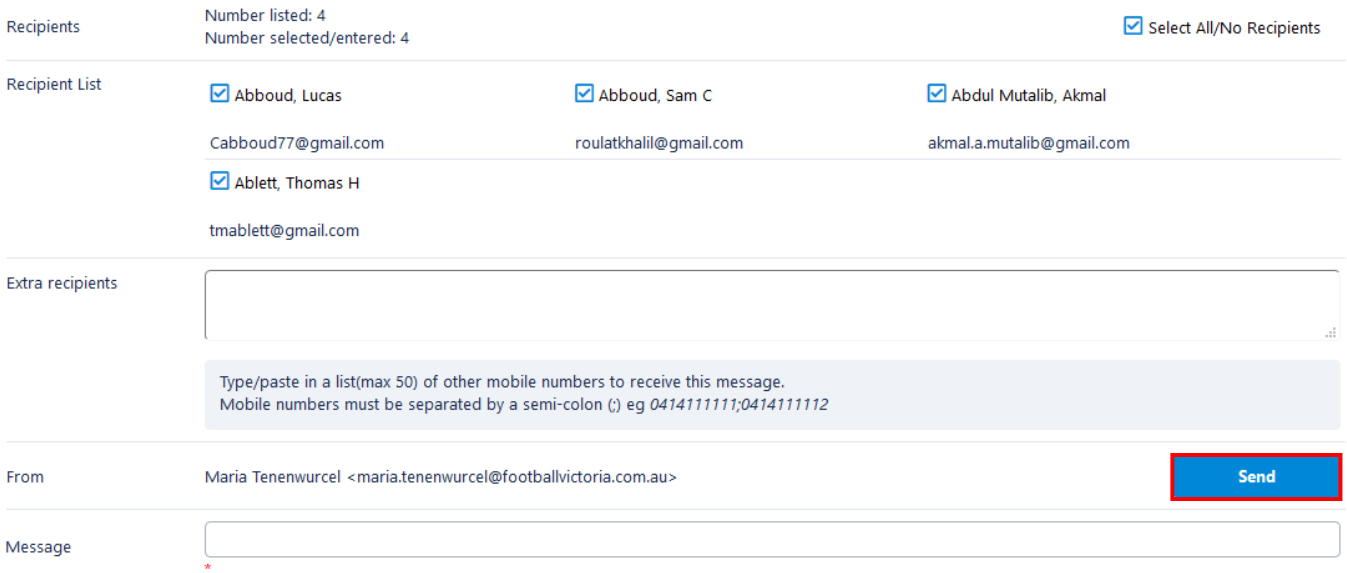
**6th step:** "Recipient List" – You can see all the recipients names and their mobile numbers. Also, you can tick or untick one by one in order to select who will be receiving the SMS.

**7th step:** "Extra Recipients" – Add extra mobile numbers to add people who is not part of the selected list.

**8th step:** "From" – If you select the "Reply Back to Your Email" option, explained on step 4 of page 51,this is the email address that will be receiving all the replies. The email address that will appear in this section is linked to the person who is logged on the Play Football account.

**9th step:** "Message" – Enter the message you want to send.

**10th step:** "Send" – Click on "Send"to send the SMS.



## 4.10 PURCHASE SMS CREDITS

## GO TO: PEOPLE ➡ COMMUNICATIONS ➡ PURCHASE SMS CREDITS

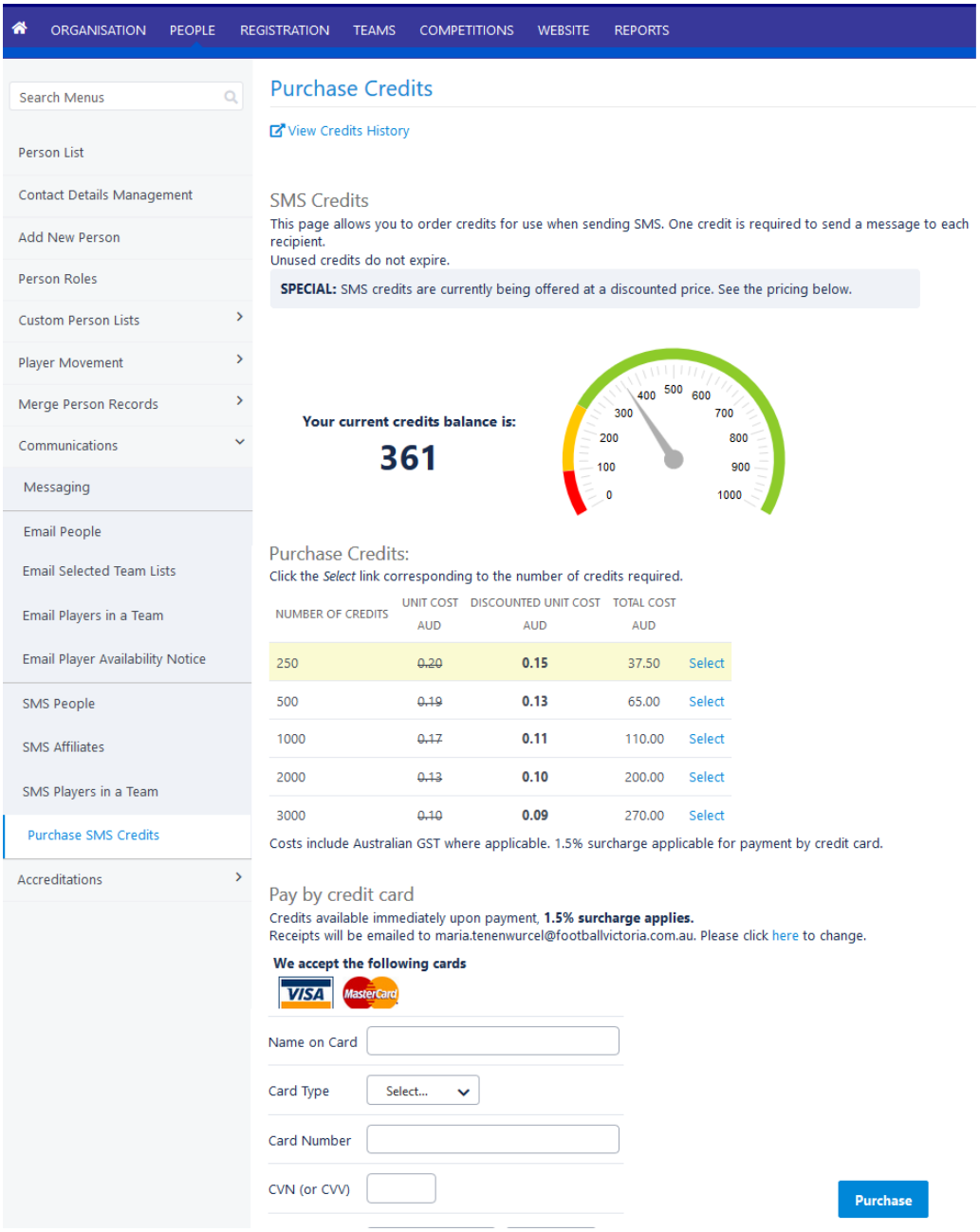
The "Purchase SMS Credits" allows the club to buy credits to send SMS through Play Football. The service is provided by InteractSport. If you have any issues with SMS, please contact InteractSport directly.

In this section, the you can see the current credit balance for the club.

Follow the steps to buy SMS credits:

**1st step:** "Select" – Choose the SMS package the club wants to buy, by clickin on "Select"in blue.

**2nd step:** "Card Details" – Enter your card details and then click on the "Purchase"button.



# 5.0 REGISTRATION

## 5.1 REGISTRATION DASHBOARD

### GO TO: REGISTRATION ➡ REGISTRATION DASHBOARD

In this section, the club can quickly access the summary of all registrations. This information can be summarised even further by using filters.

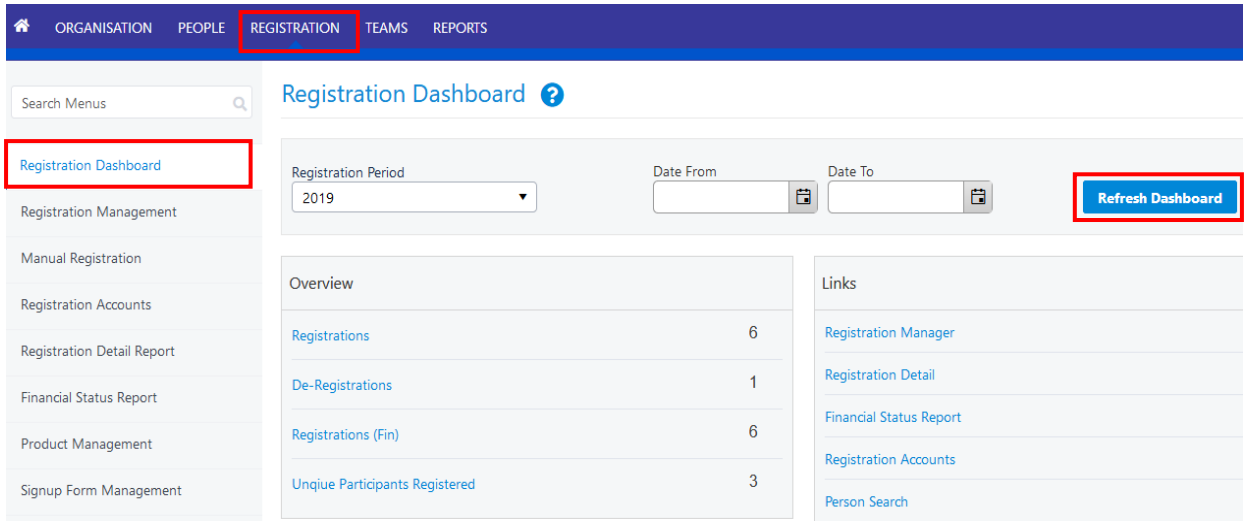
**1st step:** "Registration Period" – Select the year of the registrations.

**2nd step:** "Date From" and "Date To"– Enter "Date From" and "Date To". This section will allow you to narrow down registration information by date.

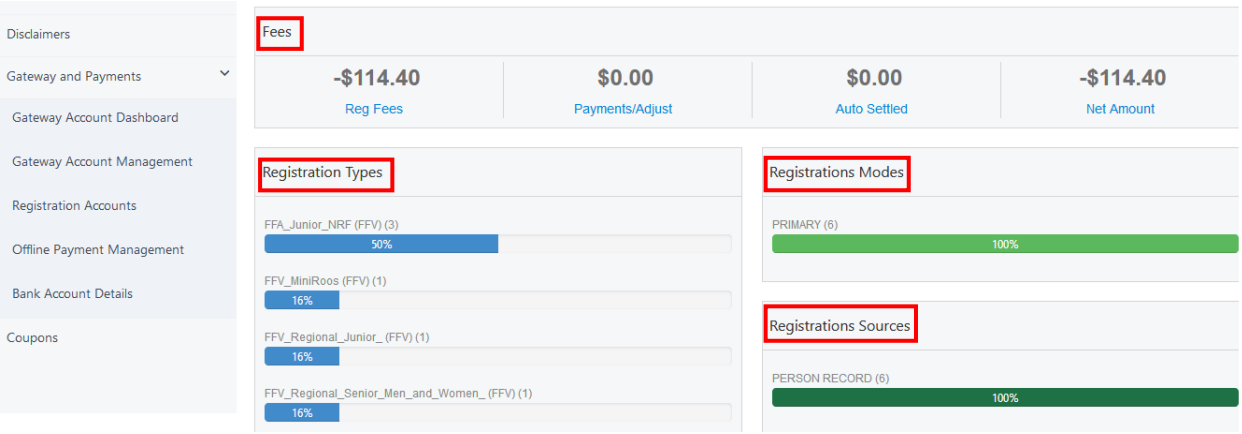
**3rd step:** "Refresh Dashboard" – Click on the "Refresh Dashboard"button, the page will be refreshed with the filtered information.

Once the page has been refreshed, you will see the summary data for registrations.

- **Overview:** Gives a quick summary of registrations and de-registrations.
- **Links:** Provides quick links to the most used links of the "Registration" tab.



- **Fees:** Shows the summary of paid and outstanding fees.
- **Registration Types:** Provides the breakdown of registrants by registration types.
- **Registrations Modes:** Summary of how many players are under their 1st registration in the season, or their 2nd registration. A 2nd registration would apply for players who switch clubs within the same registration season.
- **Registrations Sources:** Provides the breakdown of registrants by registration sources.



## 5.2 REGISTRATION MANAGEMENT

### GO TO: REGISTRATION ➡ REGISTRATION MANAGEMENT

In this section, the club can quickly search for registrants in different roles within the club, such as players, coaches and volunteers. Also, the club can do bulk searches specifically to a certain group. For example: if the club wants to search all players that are registered in the junior competition, they can narrow down the search by utilising filters.

Once the search has been finalized, the club can complete actions in regard to individuals or groups, such as "Approve Registration", "Decline Registration", "De-Register" or "Generate ID Card".

### 5.2.1 REGISTRATION MANAGEMENT SEARCH MAIN PAGE

Follow the steps to search for an individual or a group of registrants. Please note, if you want to do a wide search, leave the fields blank or select the "All"option.

**1st step:** "Parent Organisation" – The parent organisation will always be Football Victoria, unless the competition is under a regional football association.

**2nd step:** "Registration Period" – Select the season that the person registered.

**3rd step:** "From" and "To" – Choose the date range to narrow down people who registered within a certain time frame.

**4th step:** "Player Name / ID" – Search people by name or their Play Football ID number. Even though, the field is called "Player Name", you can also search for coaches and volunteers.

**5th step:** "Registration Status" – Search for a group of people within the same status. The options are Active, Pending, De-registered, Declined, Suspended, Cancelled, Required Clearance.

**6th step:** "FFA Number" field – Search people by FFA number.

**7th step:** "Registration Mode" – Allow you to search through partcipatins 1st registration, 2nd registration within the same registration period.

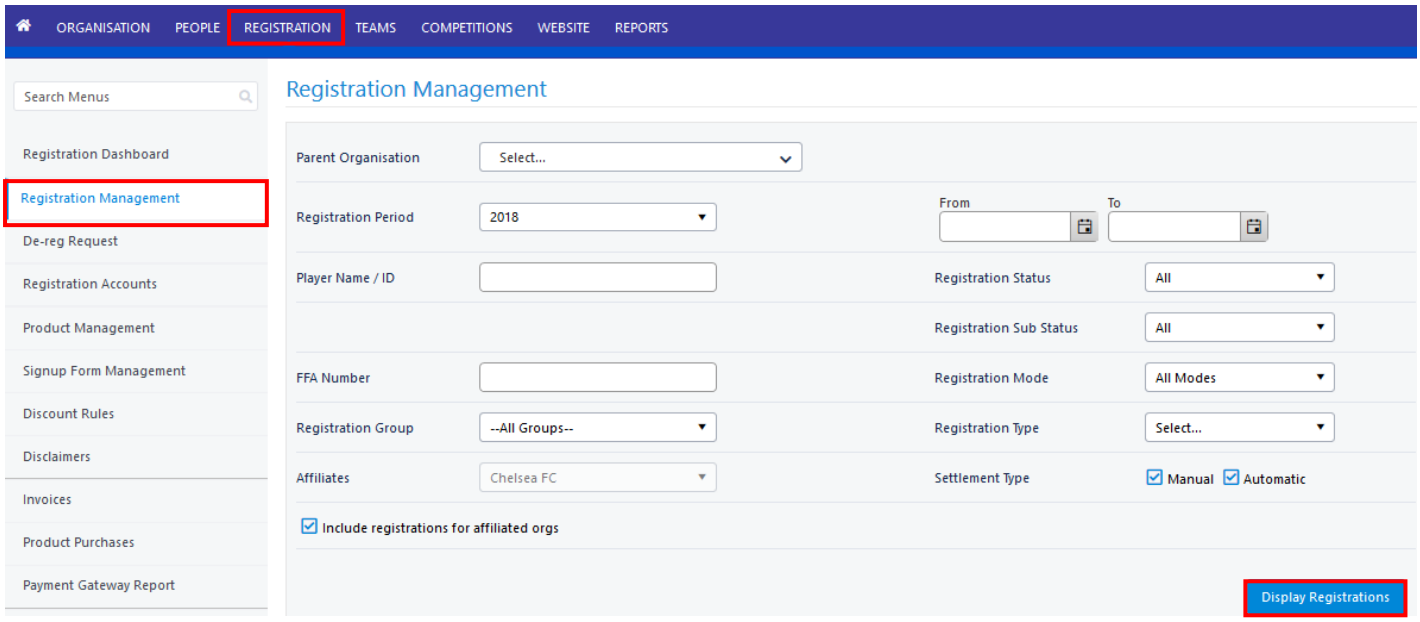
**8th step:** "Registration Group" – Choose the football type. For example: Club Football, Non Playing Roles, Futsal, etc.

**9th step:** "Registration Type" – Select a specific target group defined by a set of rules, similar to packages. For example: players registered on the FV Regional Junior Registration Type.

**10th step:** "Affiliates" – Tick the box, if you want the registrants from affiliated organisations to appear in the search.

**11th step:** "Settlement Type" – Tick the boxes to display "Manual" and "Automatic" registrations.

**12th step:** Once you selected all the filters necessary for your search, click on "Display Registrations".




The search will give you a list of registrants according to the criteria, and from there you will be able to select a particular person or a bulk of people in order to apply actions. The list contains detailed information about the person, such as Registration Date, Status, Club, Player ID, FFA ID, Player Name, DOB, Gender, Role in the Club, Football Type, Competition Level and Sub Status.

## 5.2.2 APPROVE OR DECLINE REGISTRATION

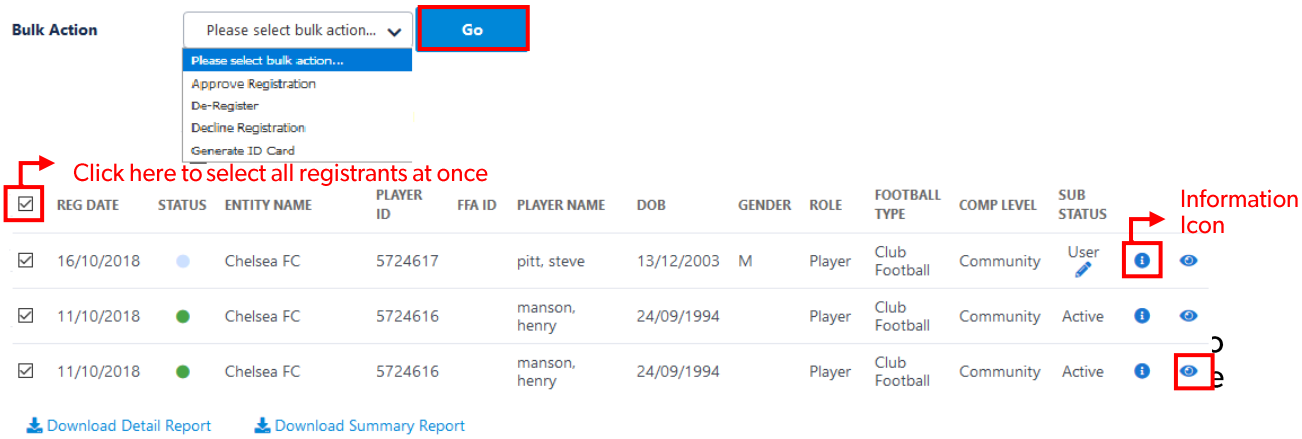
Follow the steps to approve, de-register or decline a registration.

**1st step:** Tick the box for the person or a range of people that you want to apply the action. To tick all boxes at once, select the top box.

**2nd step:** "Bulk Action" – Select the bulk action to apply to the registrants, "Approve Registration" or "Decline Registration". In order to approve a registration which was paid offline, the club needs to change the payment status to "Paid" under the "Invoice" section (See the explanation on page 75).

**3rd step:** "Go" – Click on "Go". The action will be applied to all selected registrants. Please note that color of the "Status" field will change to green once the registrant has been approved.

**4th step:** "Download Detail Report" or "Download Summary Report" – Click on the blue link to download reports.



In this section, you can see the fee information for a particular player.

**Registration Payment Detail**

## Transaction Details

### Registration Details

| | | | |
|---|---|---|---|
| Date Registered: | 11/10/2018 10:08:28 AM | Status: | Registered |
| Reg Period: | 2019 | Reg Type: | FFV Regional Senior Men and Women |
| From Entity: | Chelsea FC | To Entity: | Football Federation Victoria |
| Reg Source: | PERSON RECORD | Reg Mode: | PRIMARY |
| date de-registered: | 12/10/2018 10:26:59 AM | | |

**Registration Splits:**

| ENTITY SPLIT | REG TYPE | MODE | ORIG FEE | ACTUAL FEE |
|---|---|---|---|---|
| Football Federation Victoria | FFV Regional Senior Men and Women | PRIMARY | $69.00 | $69.00 |
| Football Federation Australia | Senior | PRIMARY | $25.00 | $25.00 |

**Registration Liabilities:**

| FROM ENTITY | TO ENTITY | FEE | PAID |
|---|---|---|---|
| Chelsea FC | Football Federation Victoria | -$69.00 | |
| Football Federation Victoria | Football Federation Australia | -$25.00 | |

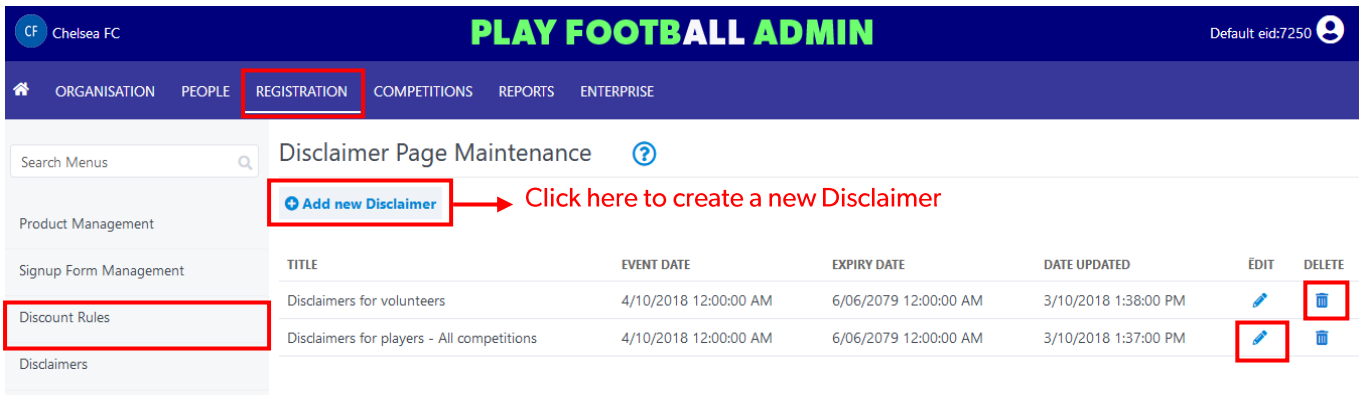
## 5.3 DISCLAIMERS

## GO TO: REGISTRATION ➡ DISCLAIMERS

In this section, the club can create disclaimers that will be connected to the signup forms. You can use the same disclaimer for different signup forms or use different disclaimers for different signup forms. Note: Football Federation Australia and FV will also add their own disclaimers to the club's signup forms.

### 5.3.1 DISCLAIMER MAIN PAGE

In this page, you can see all the disclaimers created by the club. Also, you can edit and delete disclaimers by selecting the pencil and bin icons.

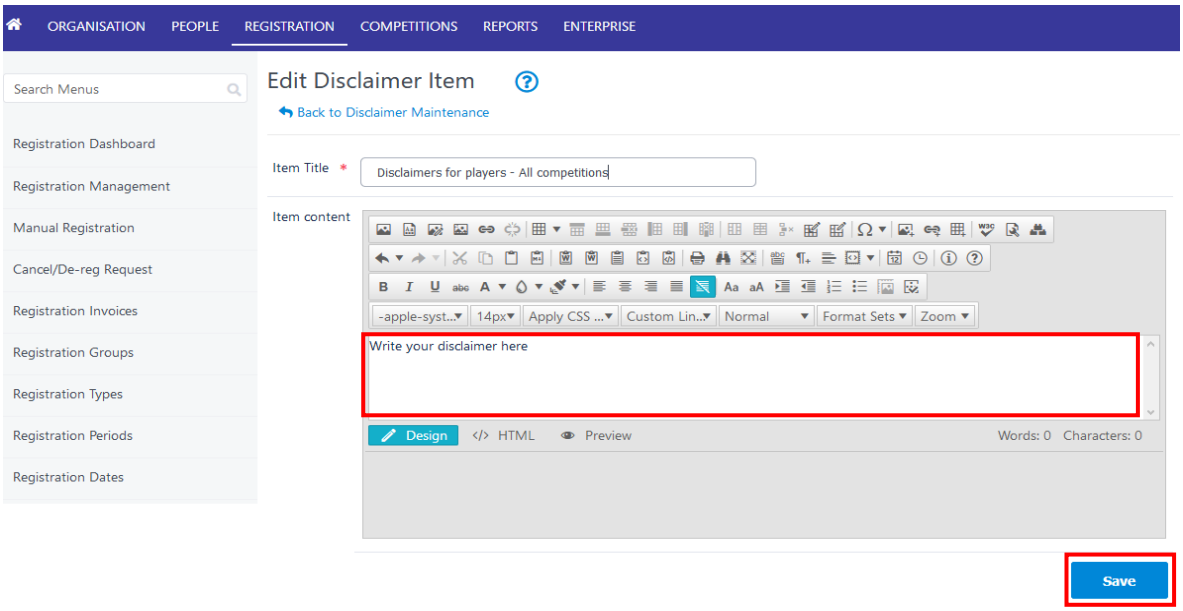



### 5.3.2 ADD NEW DISCLAIMER – TO CREATE A NEW DISCLAIMER

Follow the steps to create a new club disclaimer:

**1st step:** "Item Title" – Enter the "Item Title". This is the field to name the disclaimer and it is for internal reference only.

**2nd step:** "Blank Field" – In the blank field, you can write the full disclaimer. You have the option to format the text, add pictures and HTML Links. Also, the "Preview" button will allow you to see how the disclaimer will look. Once, everything is ready, press "Save".



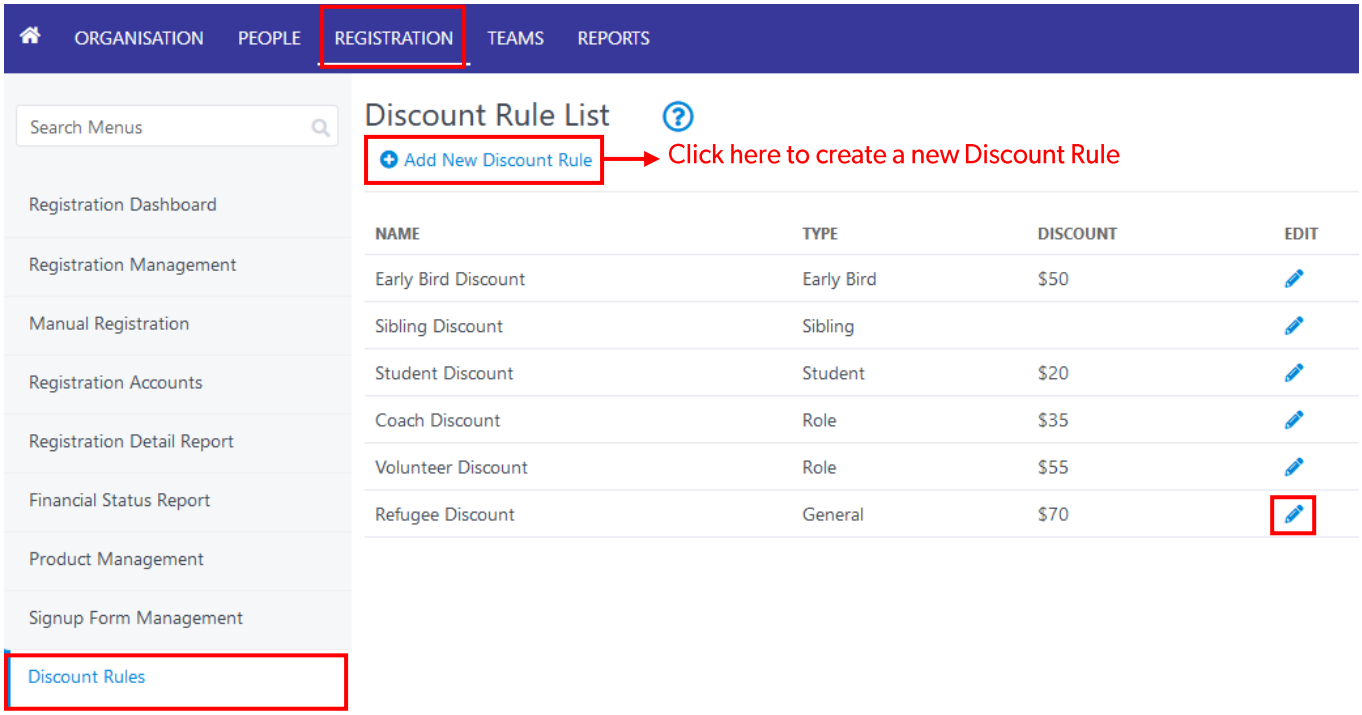
## 5.4 DISCOUNT RULES

## GO TO: REGISTRATION ➡ DISCOUNT RULES

In this section, the club can create different categories of discounts. For example: Early Bird Discount, Sibling Discount, Student Discount, etc. You will be able to select which discount should be connected to each product. You can use the same discount rule for different products.

### 5.4.1 DISCOUNT RULES MAIN PAGE

In this page, you can see all the discounts that have been set up by the club. Also, you can edit the discount type by clicking on the pencil icon.



## 5.4.2 ADD NEW DISCOUNT RULE – TO CREATE A NEW DISCOUNT RULE

In this page, the club can create new discount rules. There are 5 different types of discounts: Early Bird, Sibling, Student, Role and General.

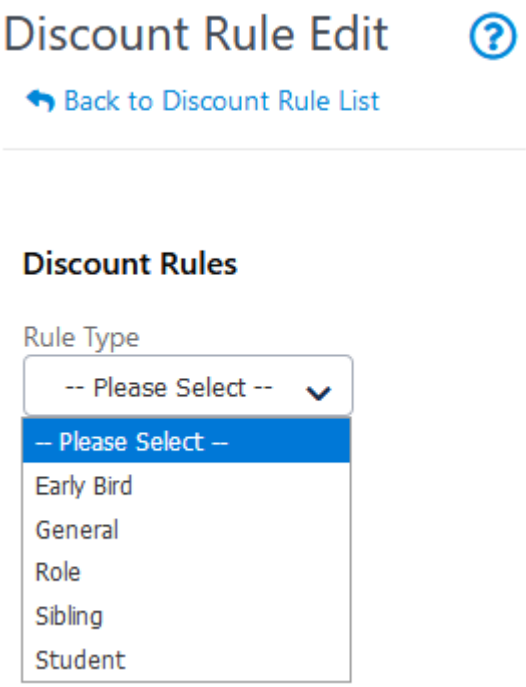
**1st step:** "Rule Type" – Select the type of discoutn you want to apply.

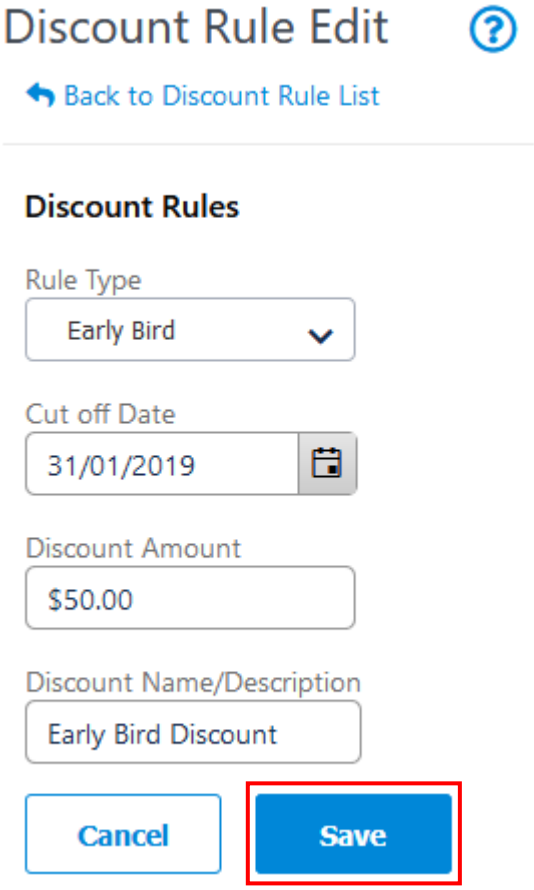
**2nd step:** "Cut Off Date" – This section is only available for the "Early Bird Rule Type". This is the date that the discount will stop to be available for registrants.

**3rd step:** "Discount Amount" – Fill discount amount.

**4th step:** "Discount Name/Description" – This name will appear for registrants. It is important to create a clear name, so there isn't any type of confusion when registrants are choosing the discount type.

**5th step:** Click on "Save".



## 5.5 SIGNUP FORM MANAGEMENT

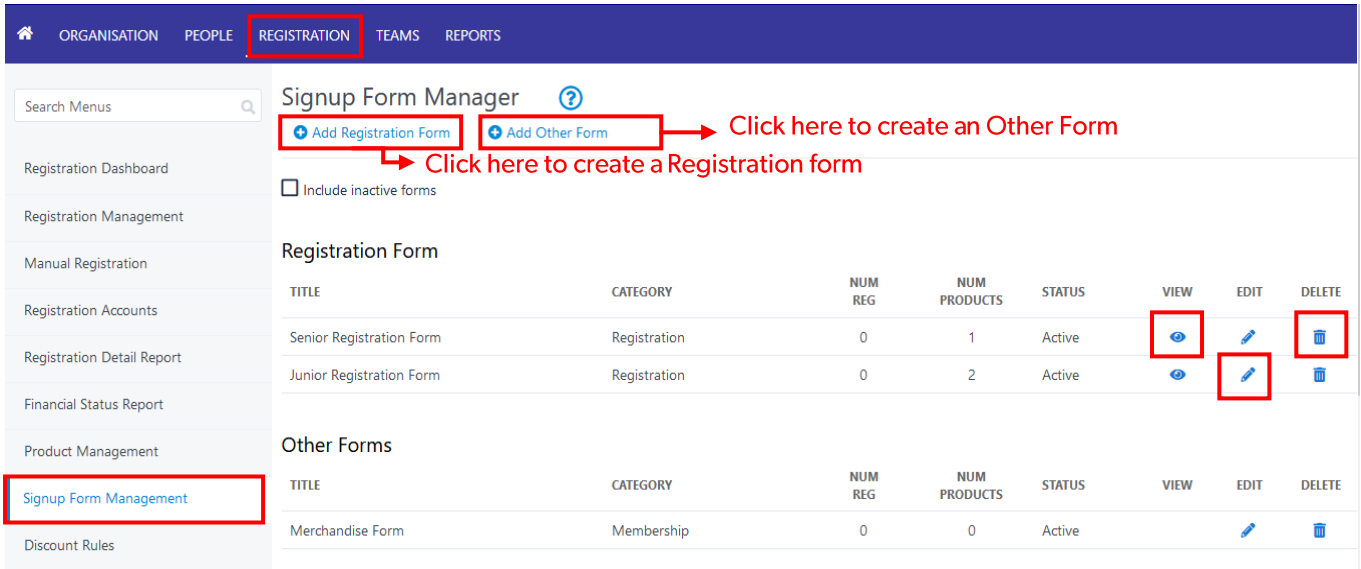
## GO TO: REGISTRATION ➡ SIGNUP FORM MANAGEMENT

In this section, the club can create different signup forms which captures a registration for players, coaches, volunteers, etc. Once you create a signup form, you can attach registration products for members to purchase. One form can be used for more than one product or you can have different forms for different products in order to target different groups.

FFA will define templates where clubs will use to create their own forms. The FFA will set up specific information that are important to be collected and the club will have the option to configure the form and settings as well as add customised fields (Page 42) into the FFA forms.

### 5.5.1 SIGNUP FORM MANAGEMENT MAIN PAGE

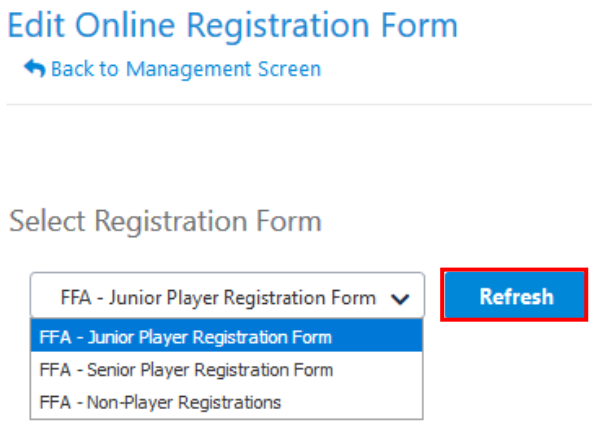
In this page, the club can see which forms have been created by club administrators. Also, in the "Num Products" field, you can see how many products are linked to a specific form, and in the "Status" field, you can see if the form is "Active" or "Inactive". You can also view how the forms look by clicking on the eye icon. In addition, you can edit forms by clicking on the pencil icon or delete forms by clicking on the bin icon.



## 5.5.2 ADD REGISTRATION SIGNUP FORM – TO CREATE A NEW REGISTRATION FORM

**1st step:** "Select Registration Form" – Select the one of the forms provided by FFA. Once, you select one of the options, click on "Refresh".

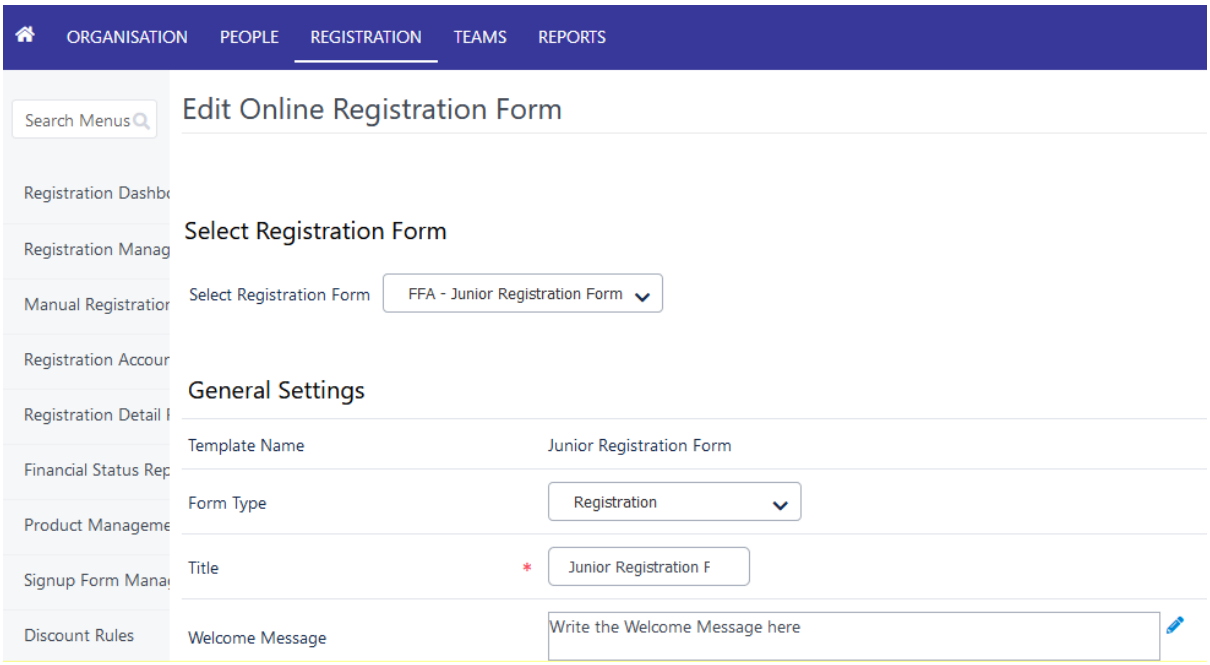
- **Junior Player Registration Form:** This form is for players under the junior category.
- **Senior Player Registration Form:** This form is for under the senior category.
- **Non-players Registrations:** This form is for any person who is not a player such as coaches and volunteers.




After clicking on "Refresh", you will be directed to the form page.

**2nd step:** "Title" – You must choose a name for the form. This will be displayed for registrants.

**3rd step:** "Welcome Message" – You can write a message to greet the participants when they start filling the form.



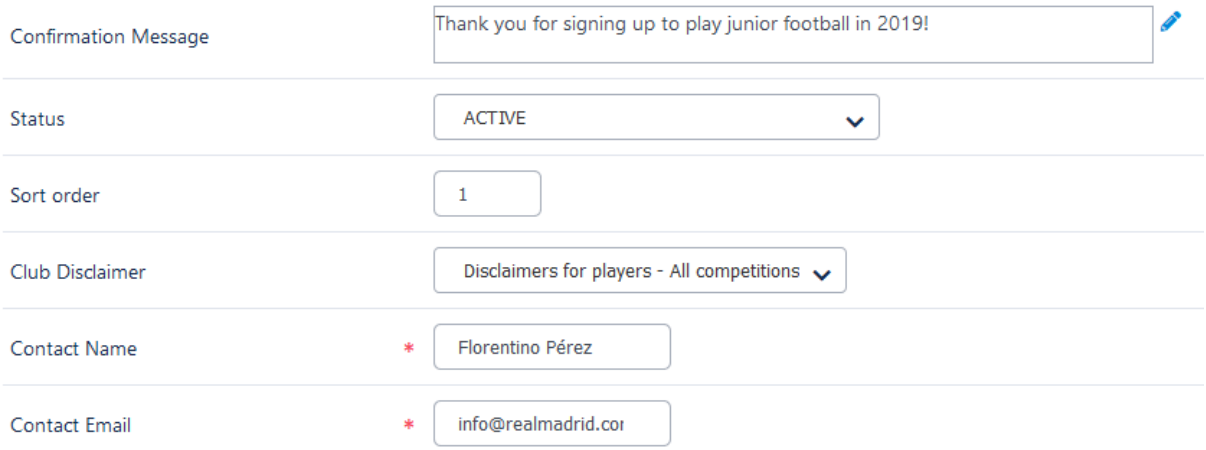
**4th step:** "Confirmation Message" – You can write a message that will appear to registrants once they finish completing the form.

**5th step:** "Status" – You can make the form active or inactive. If the form is inactive you will not be able to connect the form to a product.

**6th step:** "Sort Order" – You can rank the order that the forms will be displayed on the main "Signup Form Management" page. For example: if you want a form to be the 1st form displayed in the main page, you enter the number 1 into the "Sort Order" field.

**7th step:** "Club Disclaimer" – You can select which disclaimer will be linked to the form. Note that you will only be able to select a disclaimer, if you have previously created a disclaimer on the "Disclaimer " tab (Page 60).

**8th step:** "Contact Name" and "Contact Email" – You should appoint the name and email of the person responsible to receiving the registration information and responding to enquiries.




The "Payments Settings" will be pre-set by FFA. The club will only have the option to edit a few fields in this area.

**9th step:** "Payment Gateway" – Select the "FFA Payments FFA Payments [ffa]*"option for all signup form who require payment. Select the "No Gateway"option for signup forms for coaches and volunteers which does not require any payment.

**10th step:** "Allow Offline Payment" – Tick the box to allow manual (offline) payment. For Example: Cash, Bpay, Direct Debt.

**11th step:** "Automatically Add Processing Fee" – The fees for online payment is already set by FFA. If the club wants the registrant to pay for the 1.80% transaction fee, tick the "Pass on Transaction Fee to User" box. If the club wants to absorb the transaction fee, and make it $0 dollar transaction fees for the registrants, untick the box.

**12th step:** "Offline Payment Description" – Describe which methods of offline payment is available at your club. For example: Cash, Bpay, Direct Debt. You can also enter the bank account details of your club.

Payment Settings

| | |
|---|---|
| Payment Gateway (Online Payments) | FFA PAYMENTS FFA PAYMENTS [FFA]* |
| Allow Offline Payment | ☑ Note - you will need to manually accept and reconcile offline payments if payment is made offline. |
| Automatically add processing fee | ☑ Pass on transaction fee to user<br>Fixed Charge: AUD 0.00 plus Variable Charge: 1.80 % of transaction amount |
| Offline Payment Description | (Not entered) |
| Currency format | $ |
| Tax Description | GST |
| Tax rate (%) | 10.0 |
| Options | ☑ Display payment split information if possible |

**13th step:** "Form Fields" – You can customize the form according to the information you want to gather from your registrants. The fields available in the "Form Fields" section are pre-set by FFA, but the club has the option to include or not include those fields into the form with a few exceptions. The fields that have a lock icon are mandatory fields set by FFA. If you want to add a field that has not been selected by FFA, tick the box in the "Select Field" column. If you want to make that field mandatory, tick the box in the "Mand. Field" column. A mandatory field means that the registrant will only be able to finish completing their registration once they answer the question.

Form Fields

| Select Field | Mand. Field |
|---|---|
| ☐ Title | ☐ |
| 🔒 ☑ First Name | ☑ |
| ☐ Middle Name | ☐ |
| 🔒 ☑ Last Name | ☑ |
| ☑ Gender | ☐ |
| 🔒 ☑ Date of Birth | ☑ |
| 🔒 ☑ Email Address | ☑ |
| ☐ Home Phone | ☐ |
| ☑ Mobile Phone | ☑ |
| ☐ Address | ☐ |

This field is mandatory and was set up by FFA

This field was set up by the club

It was set up not to be mandatory

This field was set up by the club

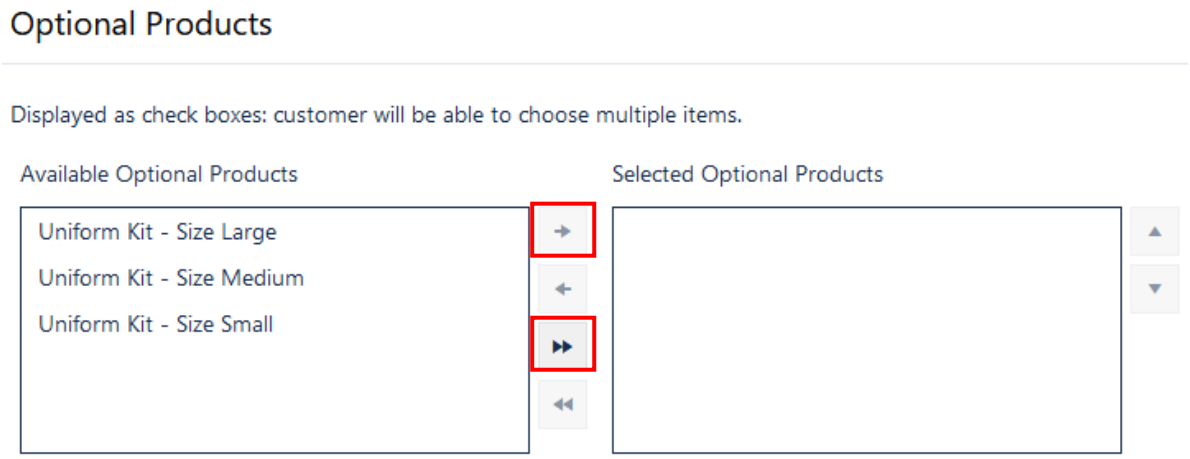
It was set up to be mandatory

**14th step:** "Other Fields" – You can see all the customised questions that were created by the club, FV or FFA. You can choose to add some of those questions to each form. To add a question to the form, select the question by clicking on the question located under "Available Fields", and then click on the arrow pointing to the right. You will notice that the question will move from the "Available Fields" column to the "Selected Fields" column. You also have the option to make those questions mandatory by ticking the box under the "Mand. Display Name Field".

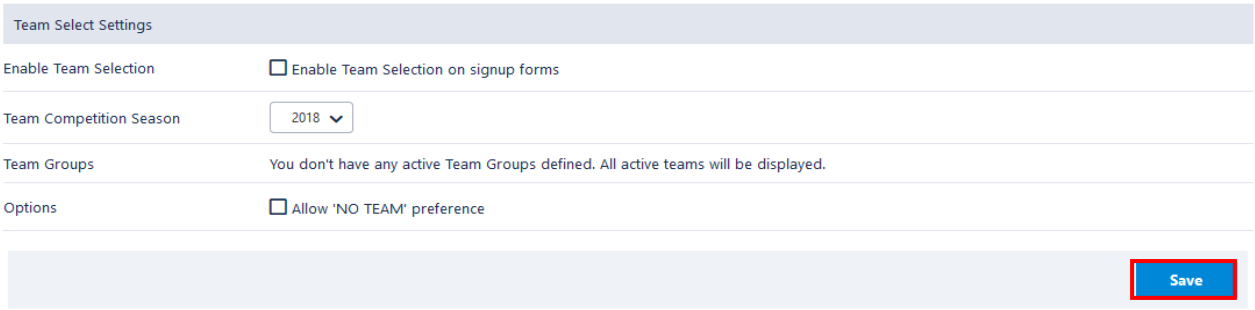
To create your own additional questions, see instructions on "Custom Fields Management" on page 42.

**15th step:** "Optional Products" – In this area, you will see all the "Other Products", previously created in the "Other Products" section of the "Product Management" tab. To create new "Other Products", refer to instructions on page 74.

Adding products to a form will allow registrants to buy additional products during the registration. To select all optional products, click on the double arrow pointing to the right. To select only one product, click on the product and then on the single arrow pointing to the right. You will see that the product will move from the "Available Optional Products" column to the "Selected Optional Products" column.




**16th step:** Once you have completed all steps, click on "Save". Your form will be created, and you will be able to see the sample on the main "Signup Form Management" page.



## 5.6 PRODUCT MANAGEMENT

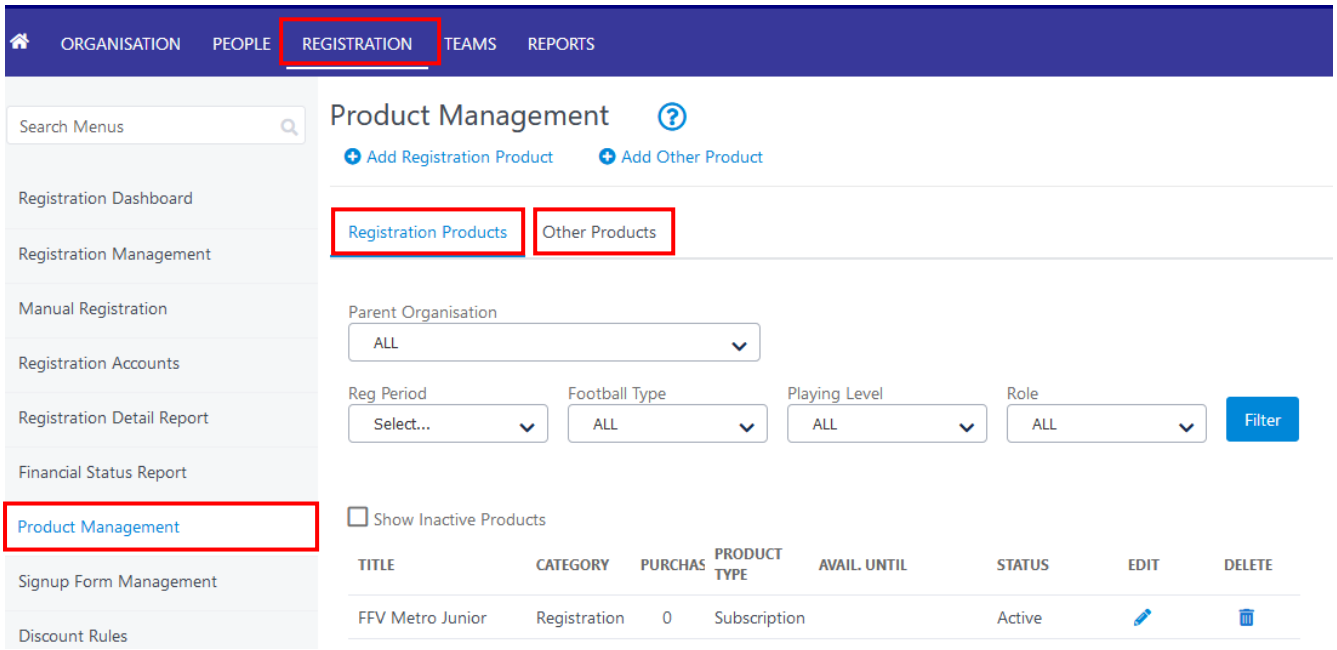
**GO TO: REGISTRATION ➡ PRODUCT MANAGEMENT**

In this section, you can see which products have been set up by the club. Also, you can create a new product for the club by progressing to two different sections. The "Add Registration Product" is the section where you can create registration products. The "Add Other Product" field will allow you to generate general products. For example: uniforms, souvenirs, tickets for an event, etc.

Important note: Before creating a product, you should create a signup form in the "Signup Form Management" tab. Please see the instructions on page 64.

### 5.6.1 PRODUCT MANAGEMENT MAIN PAGE

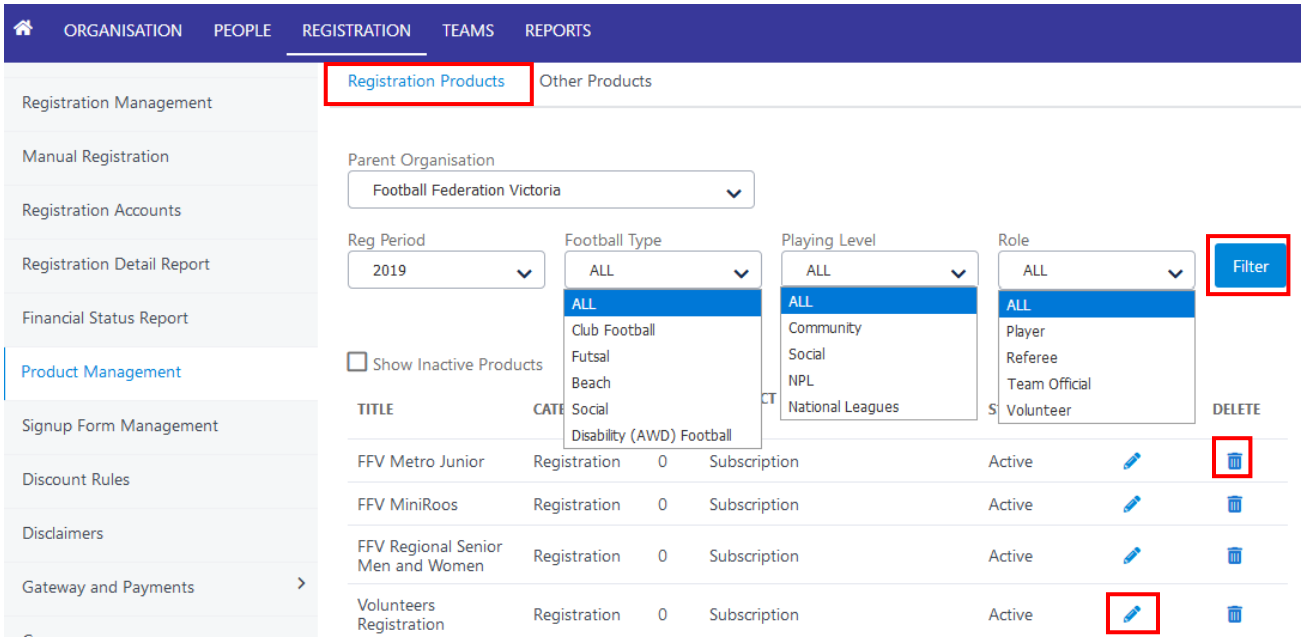
By clicking in "Registration", followed by "Product Management", you will see the main page for the "Product Management" section. In this section, you can see all products created by the club. In the "Registration Products" tab, you can see all the registration products created by the club and in the "Other Products" tab, you can see all the other general products created by the club.



## 5.6.2 REGISTRATION PRODUCTS MAIN PAGE – FOOTBALL PACKAGES

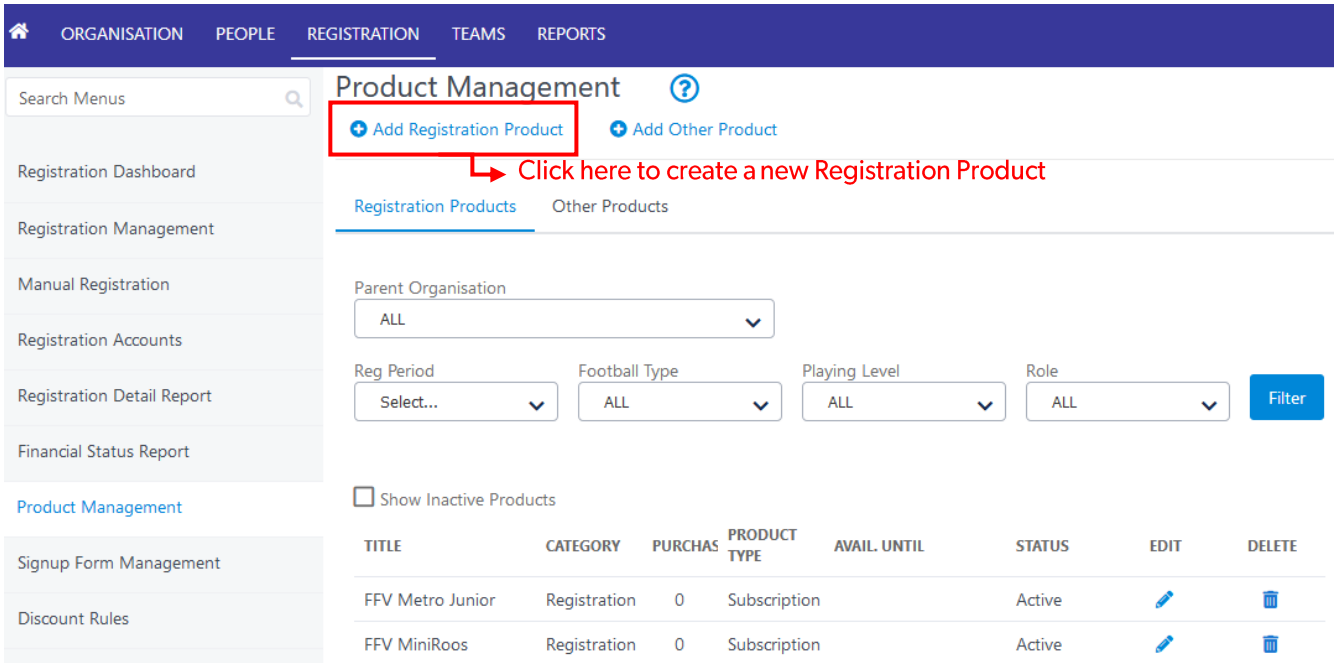
You can filter all the registration products by selecting the "Reg Period", "Football Type", "Playing Level", "Role" and then pressing "Filter". If you select the option "All" for all fields, you will be able to see all registration products of the club. You can also edit or delete registration products by clicking on the pencil icon or on the bin icon.

To see inactive products, tick the box "Show Inactive Products".




## 5.6.3 ADD REGISTRATION PRODUCT – TO CREATE A NEW REGISTRATION PRODUCT

You can start the process of creating a new registration product by clicking on Add Registration Product.



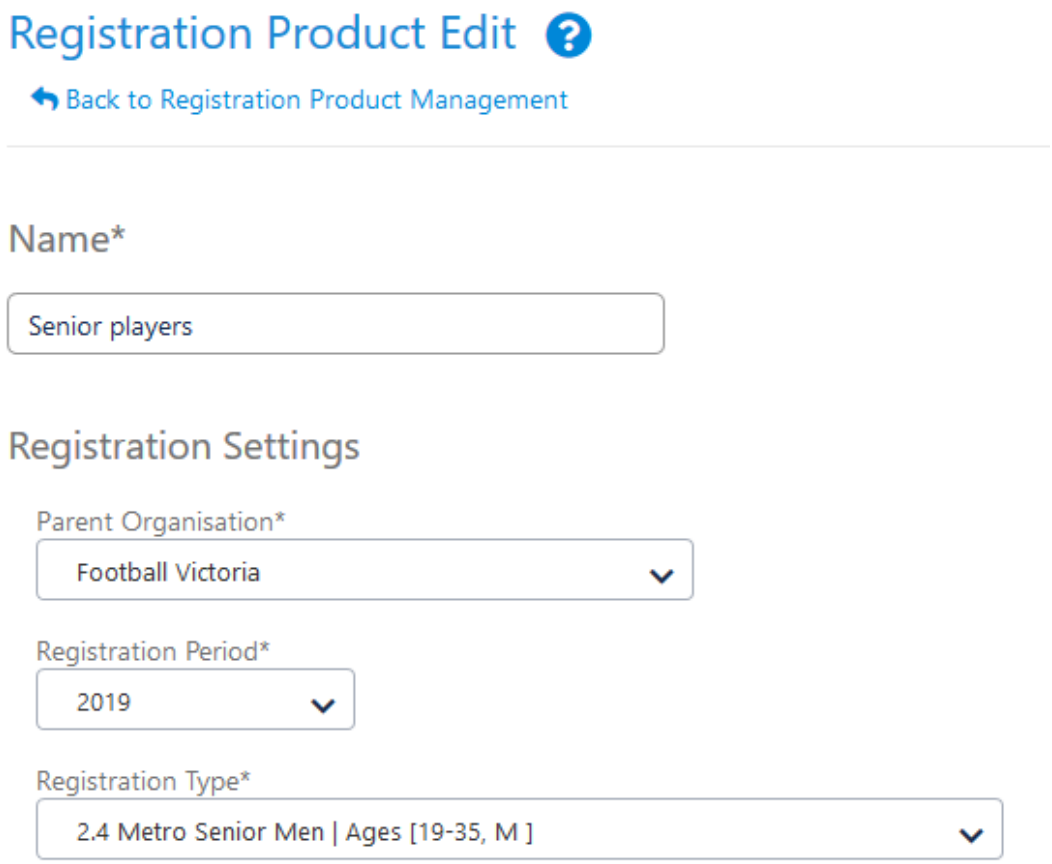
Follow the steps to create a new "Registration Product"

**1st step:** "Name" – Create a clear name to your product, this name will be displayed to registrants.

**2nd step:** "Parent Organisation" – Select "Football Victoria" or the "Association" that your club follows under.

**3rd step:** "Registration Period" – Year of the registration.

**4th step:** "Registration Type" – FFA and FV will pre-set registration fees for a specific target group. Select the group that links to your product.



As you can see below, after selecting the Registration Type created by FV, you will be able to see the registration fees breakdown from FV and FFA.

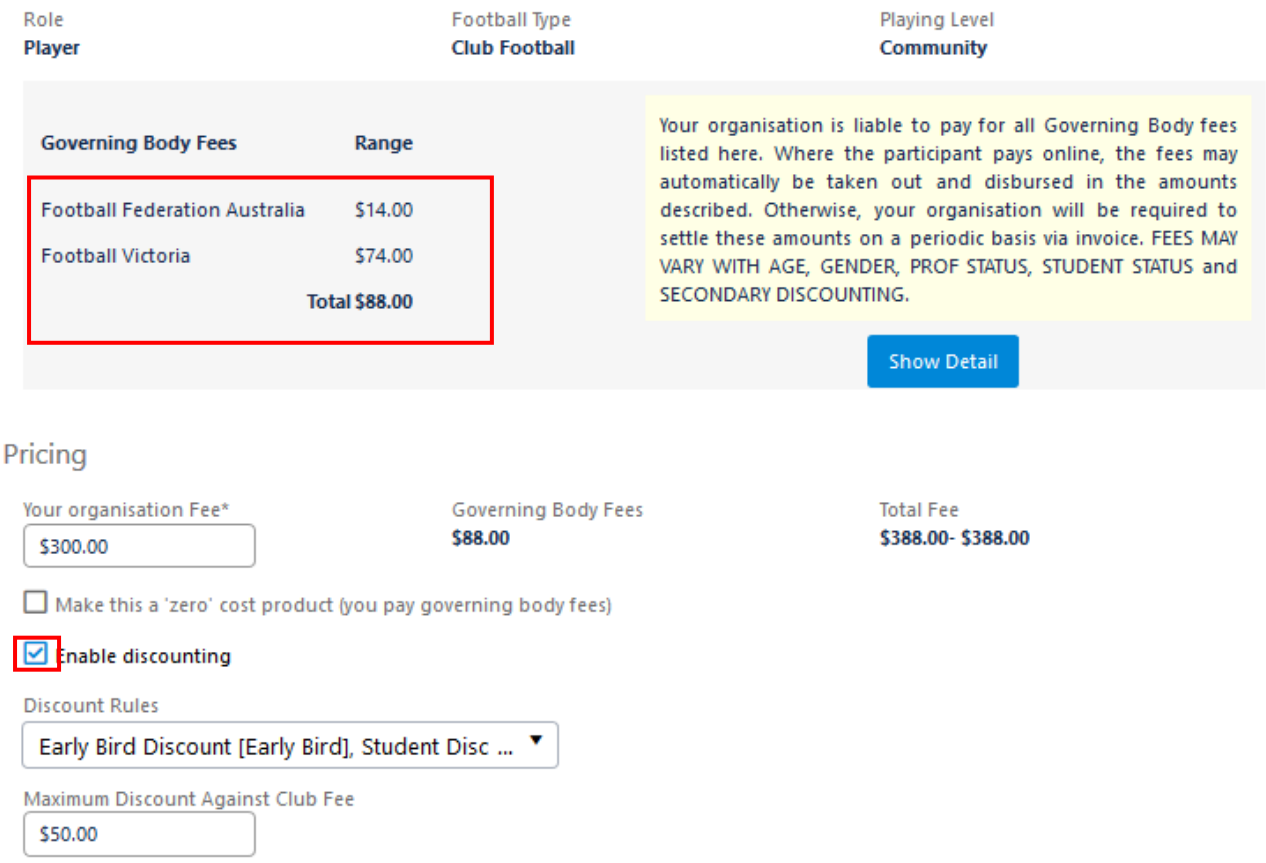
**5th step:** "Your Organisation Fee" – Put the club fee for the registration product.

**6th step: "**Make this a zero cost product" – If you tick that box, the product will cost $0 dollars for all registrants. This means that the club will absorb the governing body fees, and will be responsible for paying those fees to the parent organisations. This tool should be used in order to create special products for players who can not afford to play football.

**7th step:** "Enable Discount" – If you tick that box, you will be able to link discounts to that product. To create a new discount, refer to instructions on page 62.

**8th step:** "Discount Rules" – Choose all the discount rules that you want to make available for registrants signing to this registration product.

**9th step:** "Maximum Discount Against Club Fee" – If you make more than one discount rule available, a player might be eligible to select more than one discount. For example: a player who selects a student, early bird and sibling discount. As a result, they will have a big discount. This section will allow the club to set a limit for all discounts combined together. So, even if the sum of all discounts is high, you will be able to set a limit, lower than the combined value.



**10th step:** "Description" – Give a full description of the registration product. Registrants will be able to see this information.

**11th step: "**Active" – Tick the box in order to make the registration product active on the Play Football website. If the product is inactive you will not be able to see it on the Play Football Website.

**12th step:** "Signup Process" – Select which form you want to link to this registration product.

**13th step:** " Requires working with children workflow" – This function will allow you to collect the working with children details required for all individuals with a non playing role afilated to them at the club. Tick this box, when creating products for volunteers and coaches.

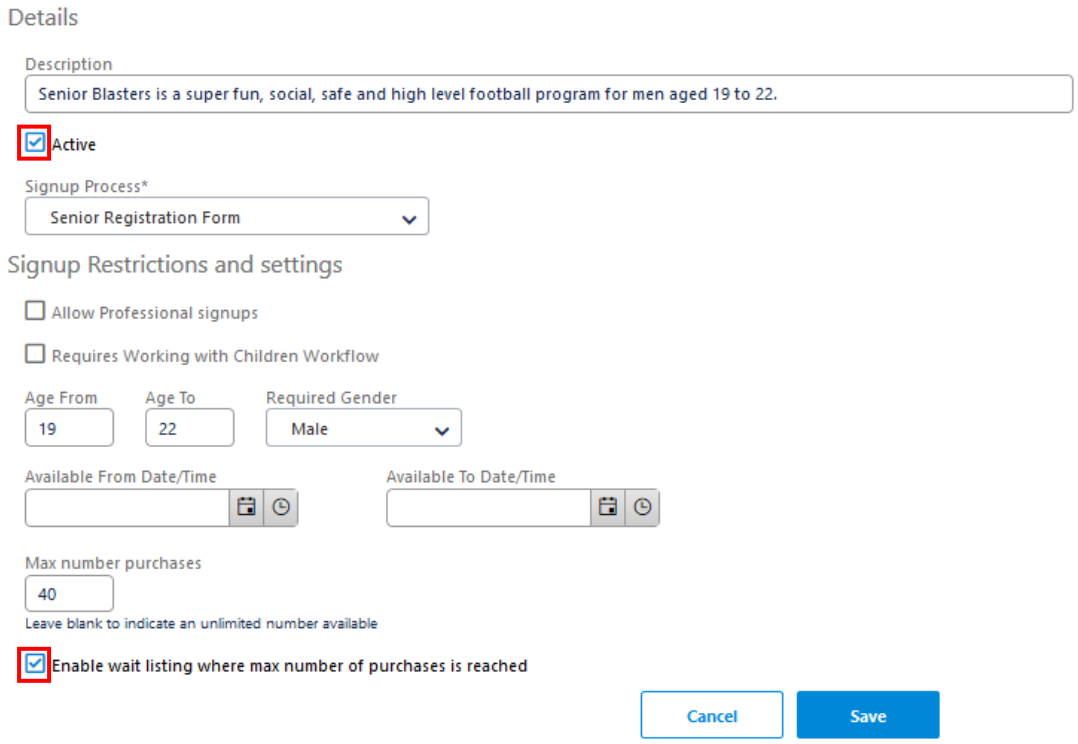
**14th step:** "Signup Restrictions" – This section allows you to narrow down the target group for the product. So, even though you selected a "Registration Type" (refere to step 4 of page 70), you can narrow down the group that are able to register to this product further, by editing the "Age From", "Age To", "Required Gender" fields. If a registrant tries to signup for a product outside their target group, they will not be allowed to continue with the registration process.

**15th step:** "Available from Date/Time" and "Available to Date/Time" – Date and time that the registration products should be available on the Play Football website.

**16th step:** "Max Number Purchases" – Number of people that are able to register to the product. If the number of registrations reach that number, no one else will be able to register. Leave blank to indicate an unlimited number available.

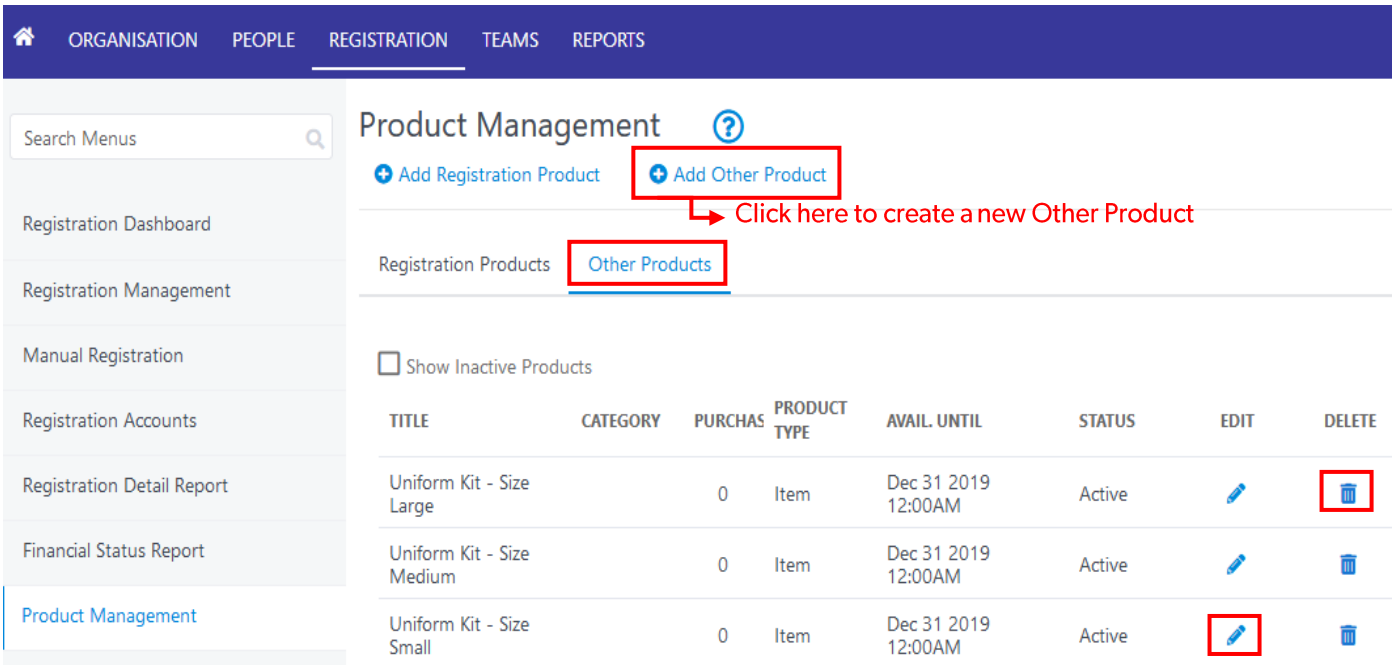
**17th step:** "Enable wait listing where max number of purchases is reached" – This box allows you to have a wating list in case the max number of puchases have reached the limiti.

**18th step:** Click "Save" to finish your product!



## 5.6.4 OTHER PRODUCTS MAIN PAGE – GENERAL PRODUCTS

In the "Other Products" section, you can see all the general products created by the club and you can also edit or delete those products by clicking on the pencil and bin icon. To create a new general product, click on "Add Other Product".



## 5.6.5 ADD OTHER PRODUCT – TO CREATE A NEW REGISTRATION PRODUCT

Follow the steps to create a new "Other Product".

**1st step:** "Name" – Create a clear name to your product, this name will be displayed to registrants.

**2nd step:** "Description" – Provide a description of the product, the description will be displayed to registrants.

**3rd step:** "Price" – How much each unit cost.

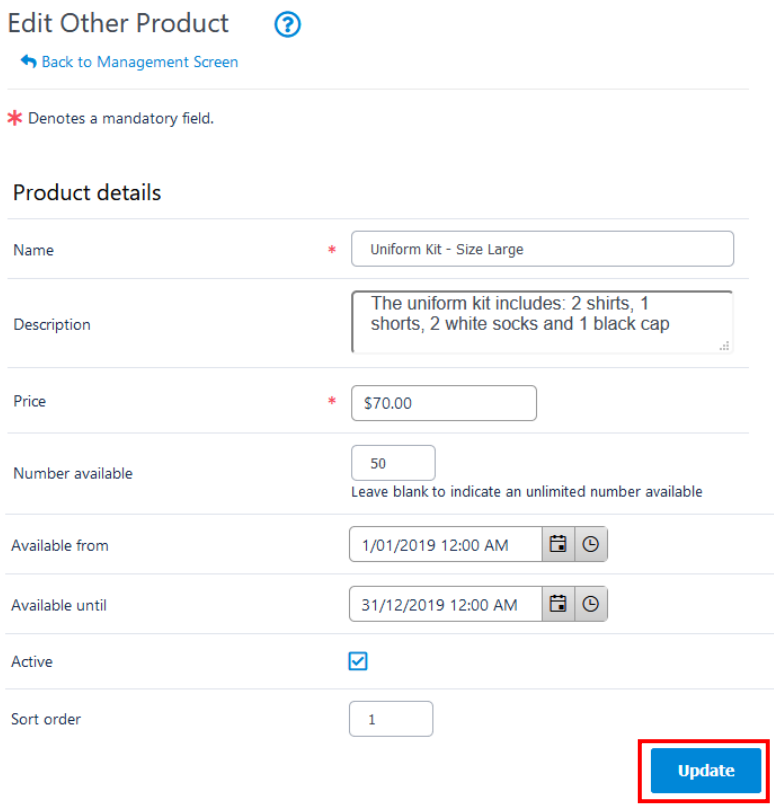
**4th step:** "Number Available" – How many products do you have in stock. If the number is unlimited, leave the field blank.

**5th step:** "Available From" and "Available Until" – Dates that the product will be available.

**6th step: "**Active" – To make the product available to be linked to forms. If product is not active, the product will be saved but not available to link to forms.

**7th step:** "Sort Order" – Rank the order that the product will be displayed on the main "Product Management" page. For example: if you want a product to be the 1st product displayed in the main page, you enter the number 1.

**8th step:** "Update" – Click on Update" to save the product.



## 5.6 INVOICES

## GO TO: REGISTRATION ➡ INVOICES

In this section, you can see the invoice and payment status for each registrant. You can also download their invoice or email the invoice straight to the registrant. In addition, before approving a registration where the player has paid offline, it is required to change the payment status for the player from "Not Paid" to "Paid". Only once the payment status has been completed, the registration will be able to be approved under the "Registration Management" tab (Please see the explanation on page 57).

### 5.6.5 CHANGING PAYMENT STATUS – TO APPROVE A REGISTRATION

Follow the steps to change the payment status:

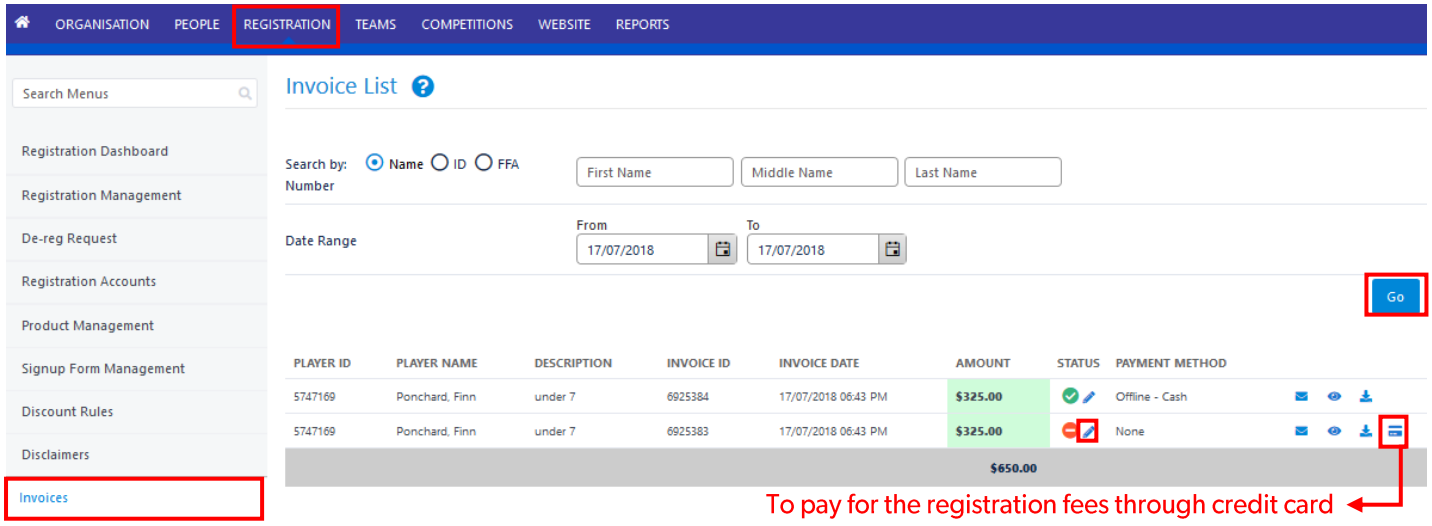
**1st step:** "Search by Number" – Select "Name" to search for a record by the registrant's name or "FFA" to search for a record by the registrant's FFA number.

**2nd step:** "Date Range" – Select a date period, if you only want to see invoices for registrations of a certain period.

**3rd step:** "Go" – Press "Go" to complete the filter.

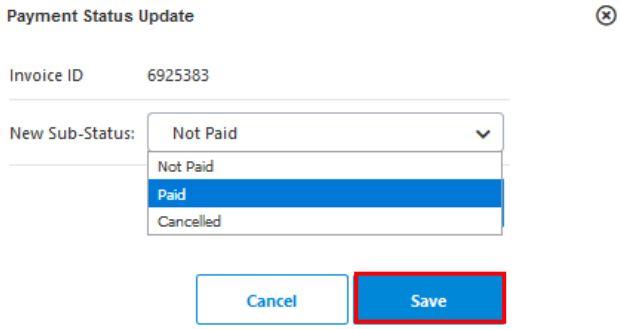
**4th step:** "Status" – The status in green with a tick icon means that the player has paid for his registration. The status in red with a negative icon, means that the registrant has not paid for his registration fees yet. To change the payment status for a player who has payed offline, click on the pencil icon.

**5th step:** "Online Payment" – In order to pay the registration fee through a credit card, click on the card icon.



Once you click on the pencil, you will be able to change the payment status.

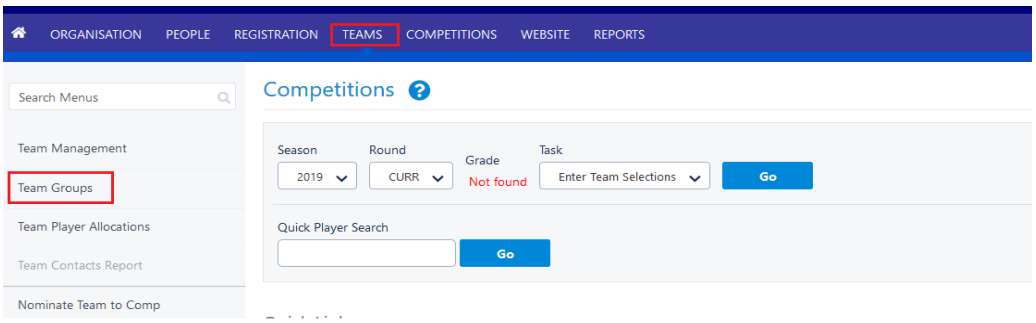
**6th step:** "New Sub-Status" – Select the payment status for the registrant. Only registrants with the "Paid" status, will be able to have their registrations approved in the "Registrations Management" section, page 57. Click on "Save" to complete the change.




# 6.0 PLAYER ID CARDS

## GO TO: TEAMS → TEAM GROUPS

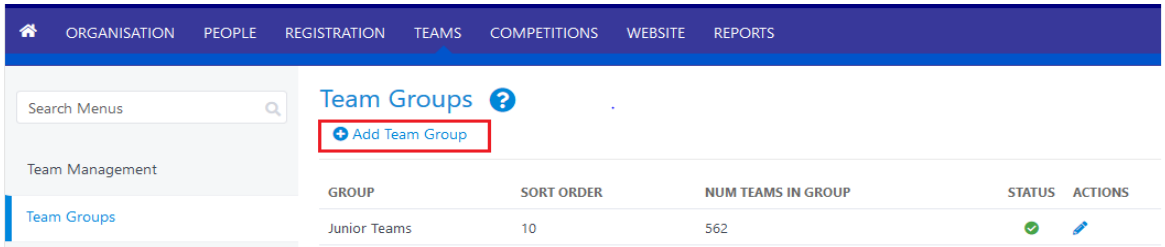
The "Teams" tab will allow you to allocate players to their nominated team and generate player ID cards. You also can assign a coach to the team.




## 6.1 TEAM GROUPS

Follow the steps to create your team groups:

**1st step:** Select "Add Team Group"

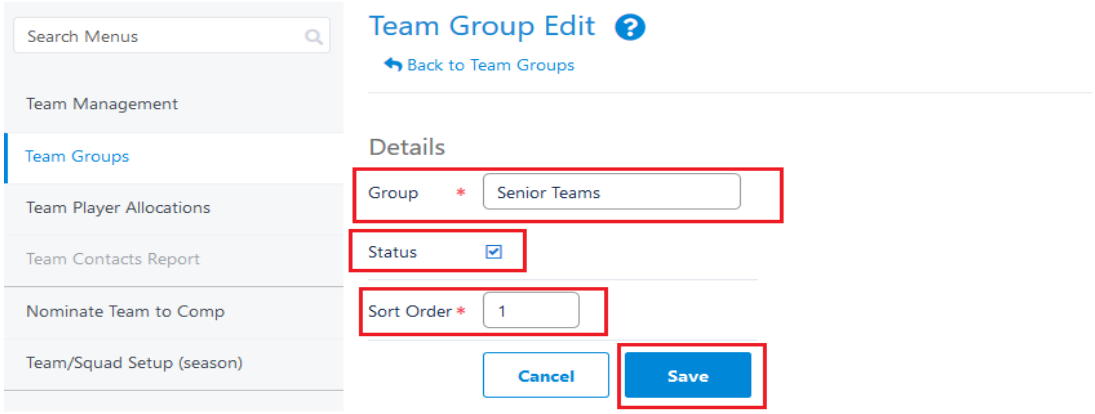



**2nd step:** "Group"- Create your "Group" according to the teams at your club. For example, 'Senior Teams', 'Junior Teams' or 'Other Teams' (social).

**3rd step:** "Status" - Ensure the "Status" box is ticked to make the team group active.

**4th step:** "Sort Order"- Number your groups, example Senior: 1

**5th step:** "Save" – Click on "Save" to save the group.

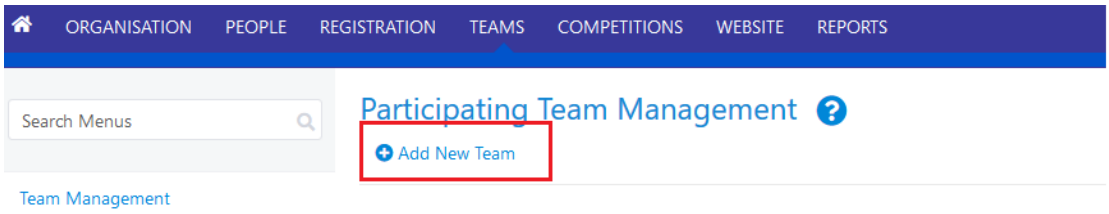



Once completed you should have created your "Team Groups".

## 6.2 TEAM MANAGEMENT

Follow the steps to create teams to place your players into by selecting the "Team Management" tab:

**1st step:** Select "Add New Team" – This will allow you to edit your team details.




**2nd step:** "Team Name" – Select the team name you want to create, for example 'Under 15'.

**3rd step:** "Grouping" – Select which group to place the team in from the 'Team Groups'you created previously.

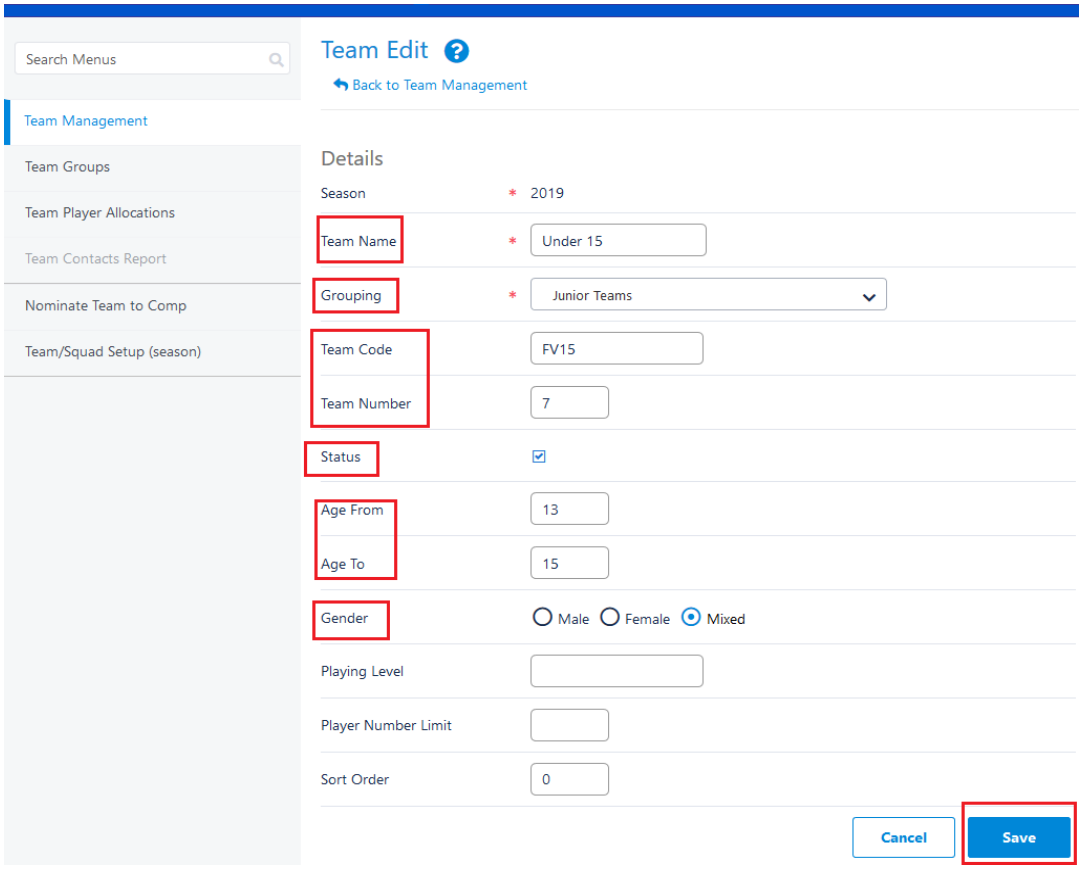
**4th step:** "Team Code/Team Number" – You can create a unique "Team Code"& "Team Number for each team.

**5th step:** "Status" - Ensure the "Status" box is ticked to make the team group active.

**6th step:** "Age From/Age To" – You can select the age range for your team.

**7th step:** "Gender" – Select the gender you want to select. It is advised to select the 'mixed'option.

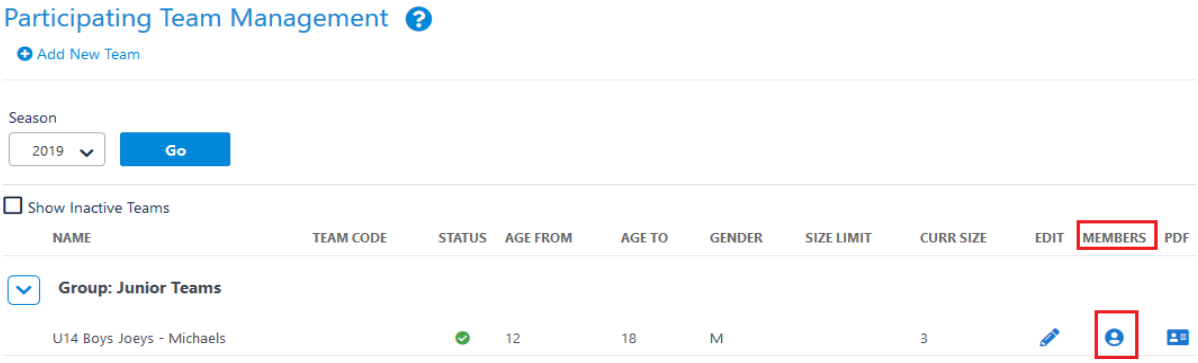
**8th step:** "Save" – Click on "Save" to save the group.



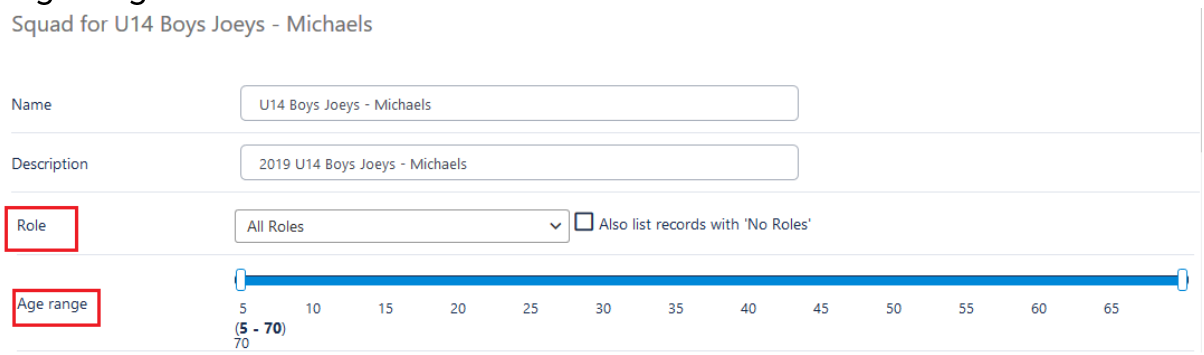

## 6.2.1 ALLOCATING PLAYERS TO TEAMS

After creating your teams in "Team Management" you can now assign players to their team by following the steps:

**1st step:** Select the icon shown below "Members".

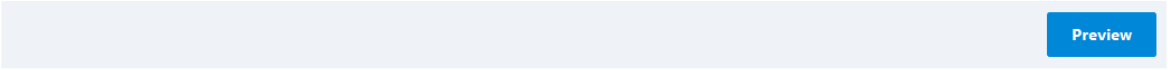


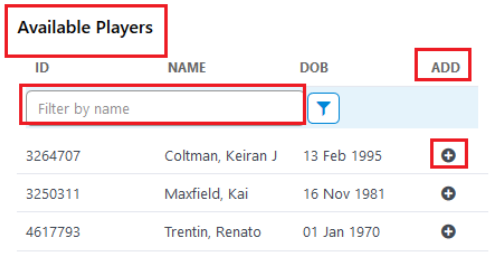
**2nd step:** "Role/Age Range" – Select the players "Role" (ex. Junior), you can also filter by "Age Range".

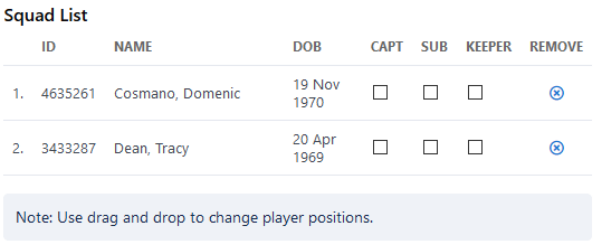



**3rd step:** "Preview" – Press "Preview"to complete the filter.

**4th step:** "Available Players" – Once filtered you can now select the players you wish to add to the team. This can be done by filtereing of name or simply scrollowing through the list. You can then add the players by selecting the symbol under "ADD". Players selected will then show in the "Squad List". Players can be assigned roles and removed under "Squad List".

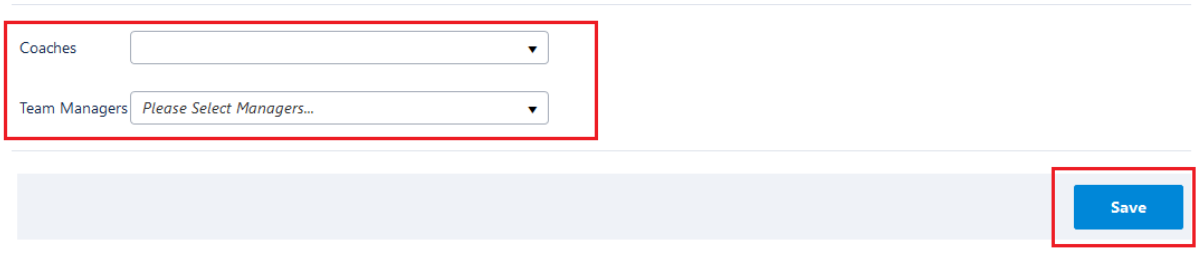



**5th step:** "Coaches/Team Managers" – You can also select the teams Coach and Team Manager.

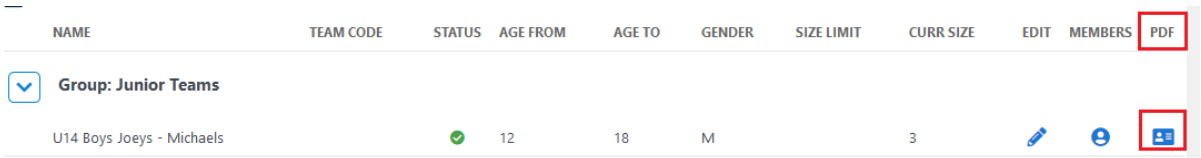
**6th step:** "Save" – Click on "Save" to save the team.



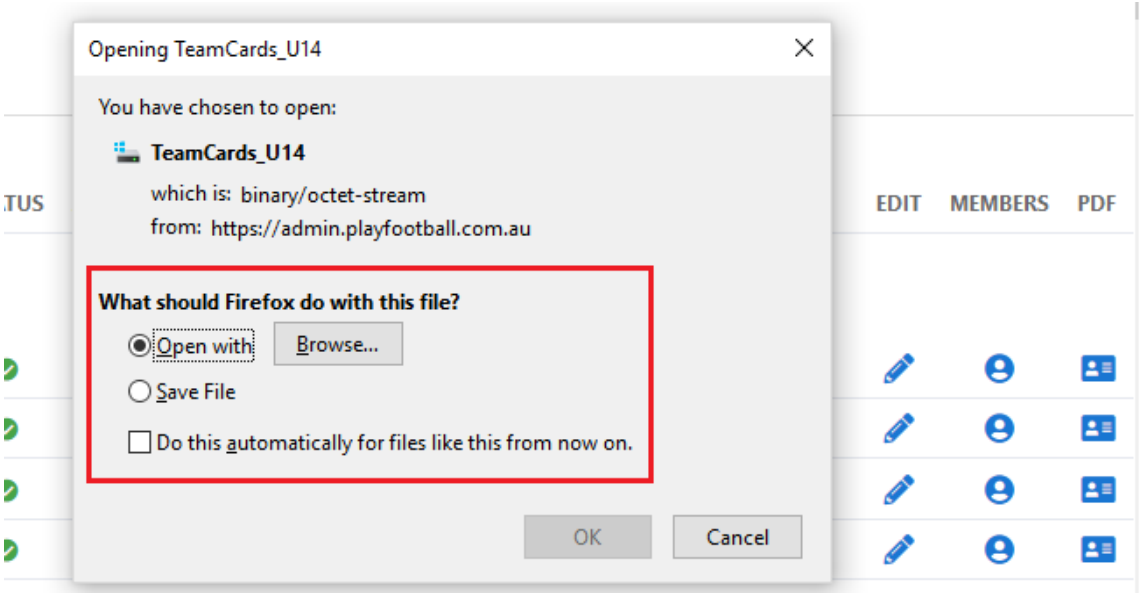
## 6.2.2 DOWNLOADING PLAYER ID CARDS

Follow the steps to print Player ID Cards:

**1st step:** In "Team Management" select the icon shown below "PDF".



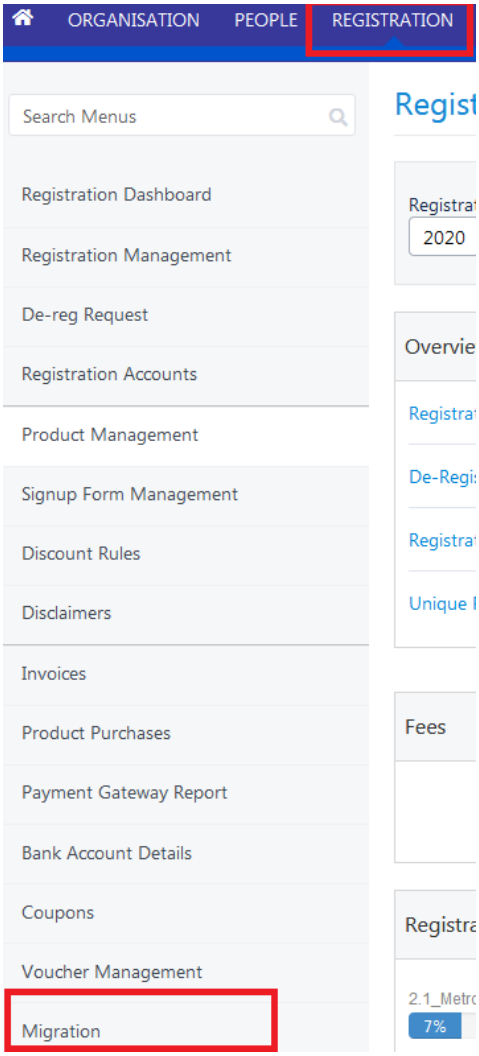

**2nd step:** You will then be asked if you want to 'open' or 'save' the file, you can choose either option. Ensure that when printing the Player ID cards are in PDF format.



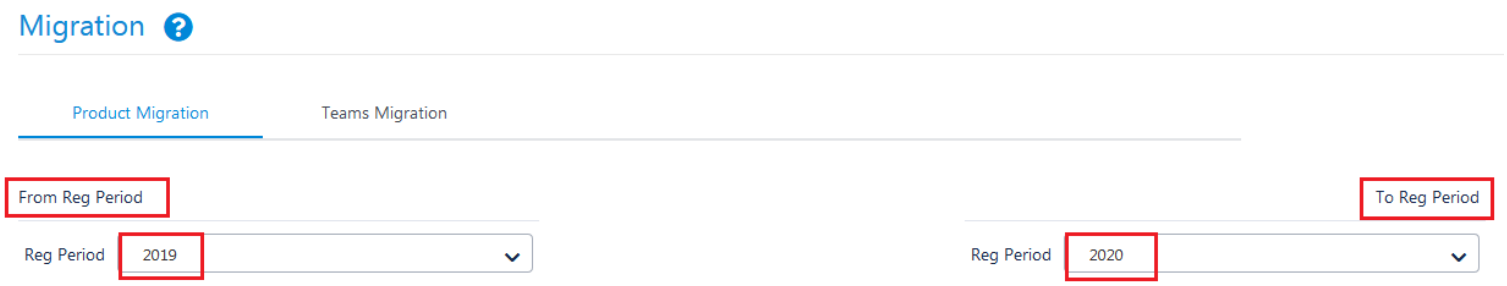
# 7. PRODUCT MIGRATION

## GO TO: REGISTRATION ➡ MIGRATION

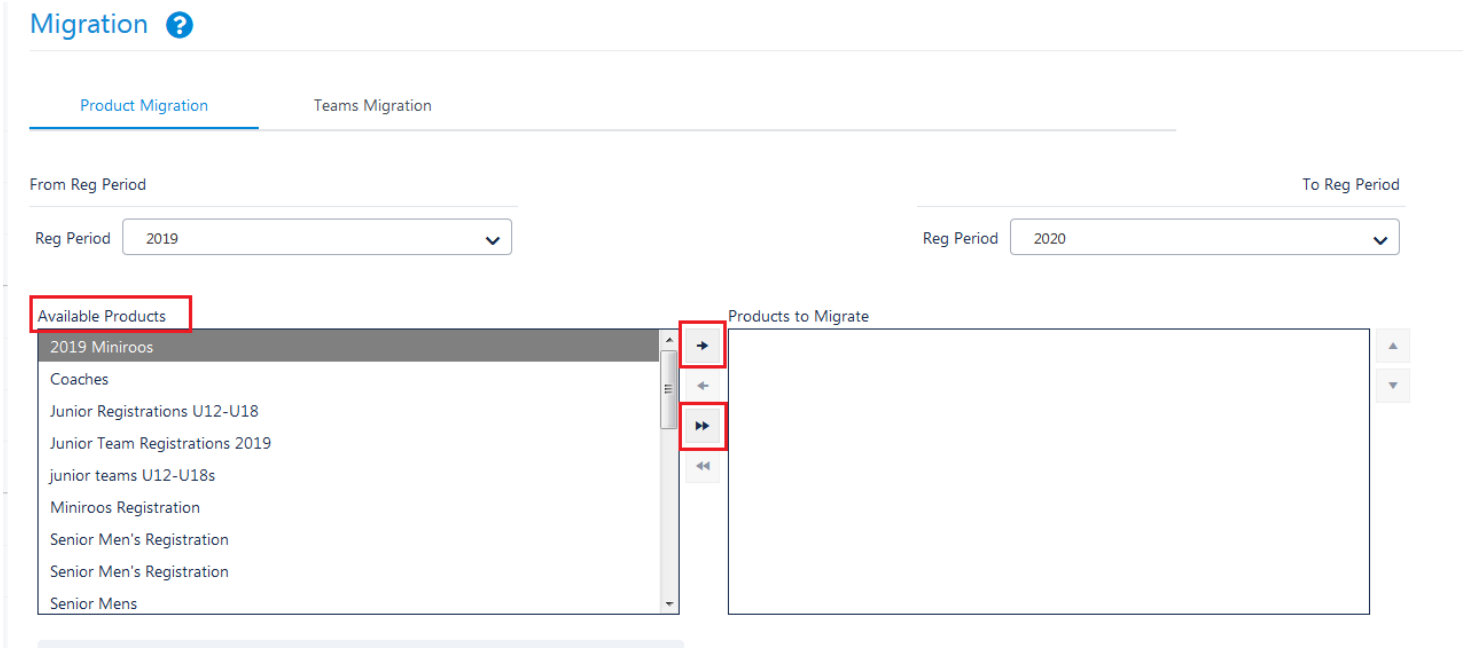
The "Migration" tab will allow you to migrate your products from last season to the current season.




**1st step:** Set the "From Reg Period" year to last season & then "To Reg Period" year to the current season.

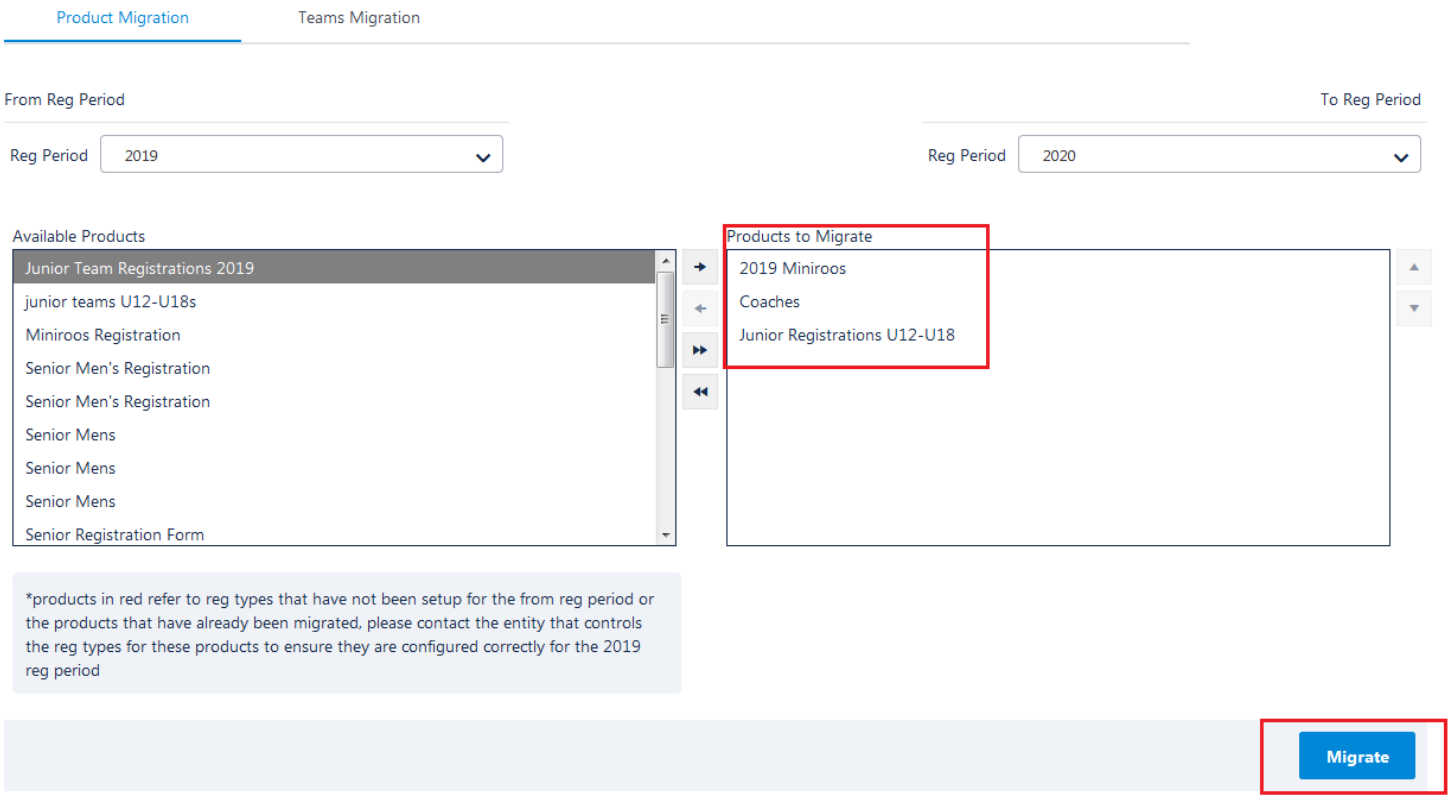


**2nd step:** Select from the "Available Products" which product you would like to migrate into the current season by using the single arrow for one product or the double arrow for all products.

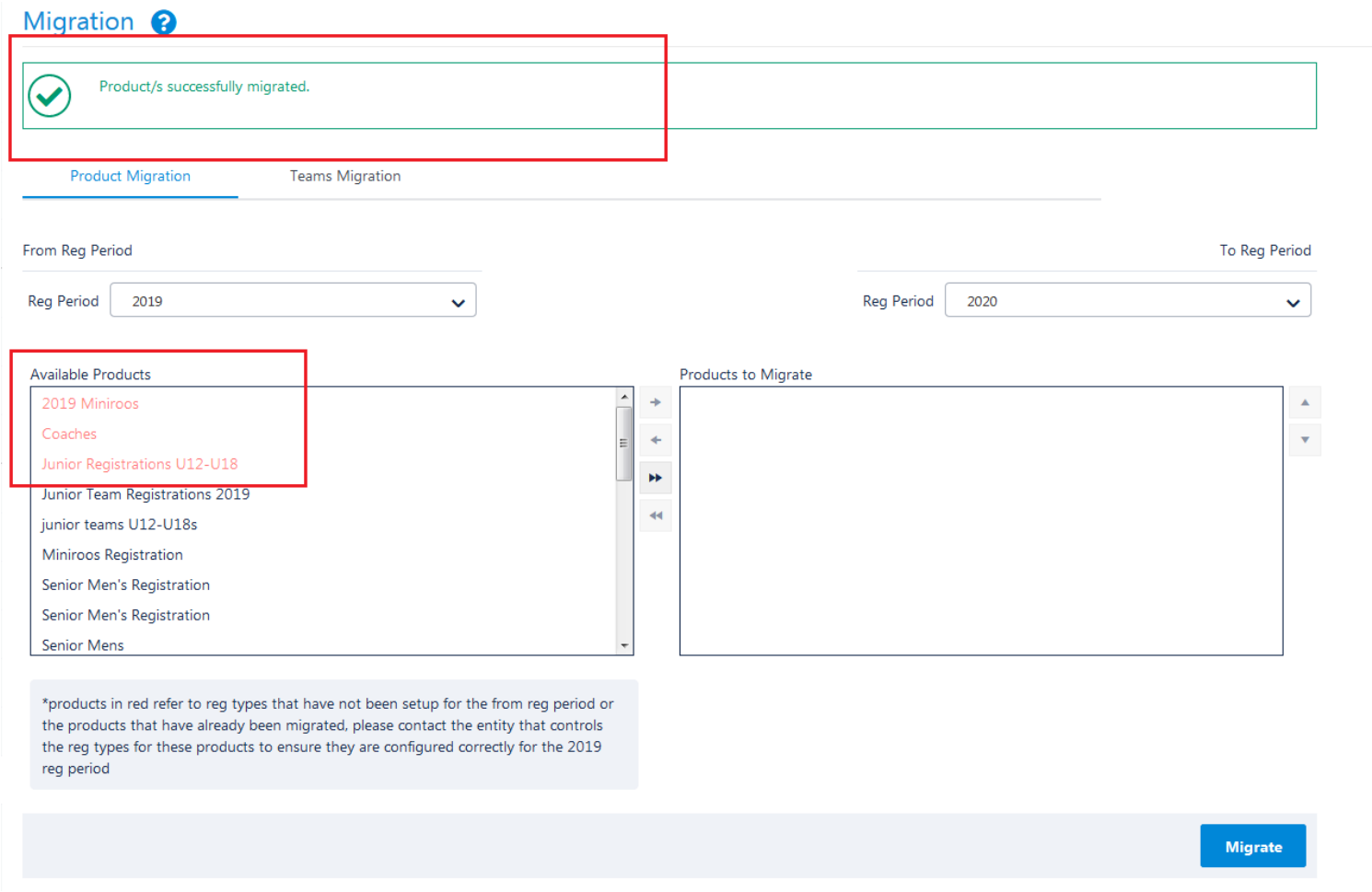



**3rd step:** Once you have confirmed which products to migrate into the current season click "Migrate".

Please note that once this step is complete, it cannot be reversed.



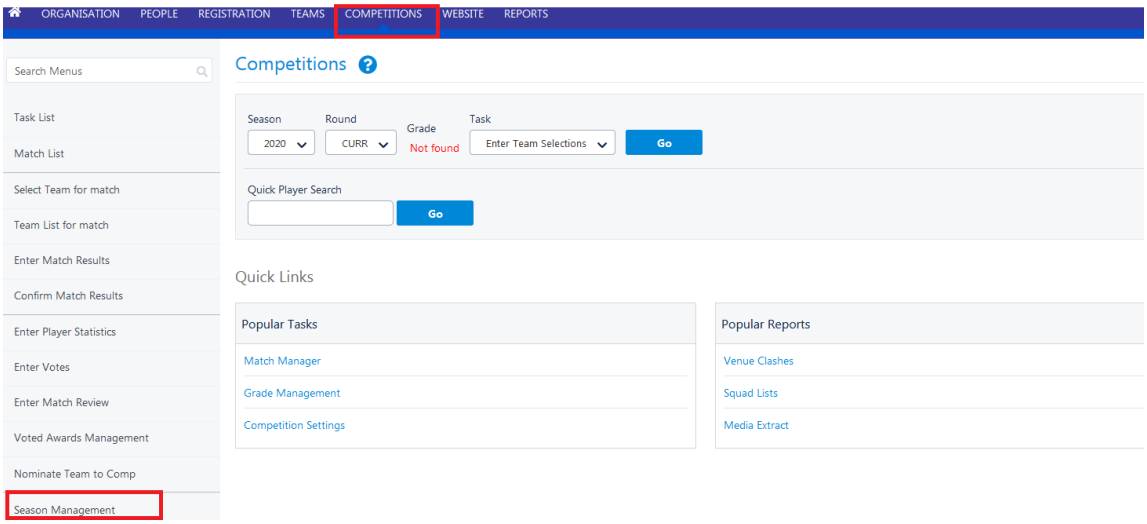
**3rd step:** After clicking "Migrate" products will appear in red and can now longer be migrated.



# 8.TEAM MIGRATION

## GO TO: COMPETITIONS → SEASON MANAGEMENT

The "Season Management" tab will allow you to change the season year.

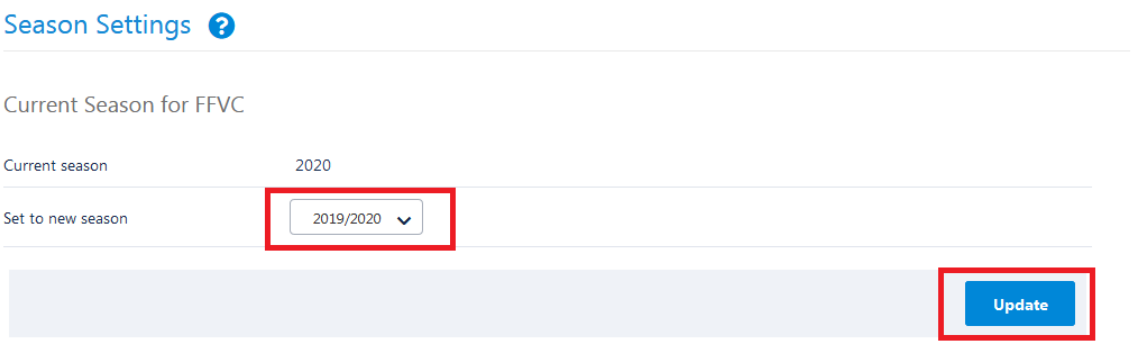



## 8.1 SET NEW SEASON

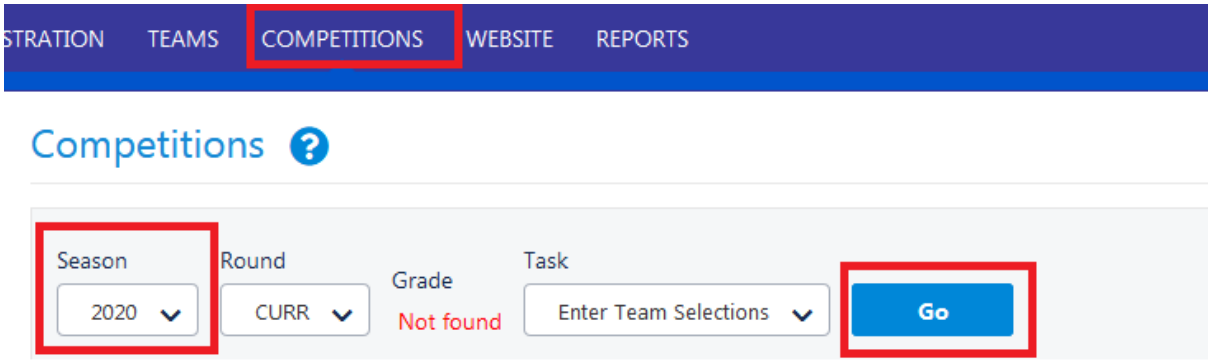
Follow the steps to update season:

**1st step:** Select "2020" in the set to new season drop down

**2nd step:** Click "Update"

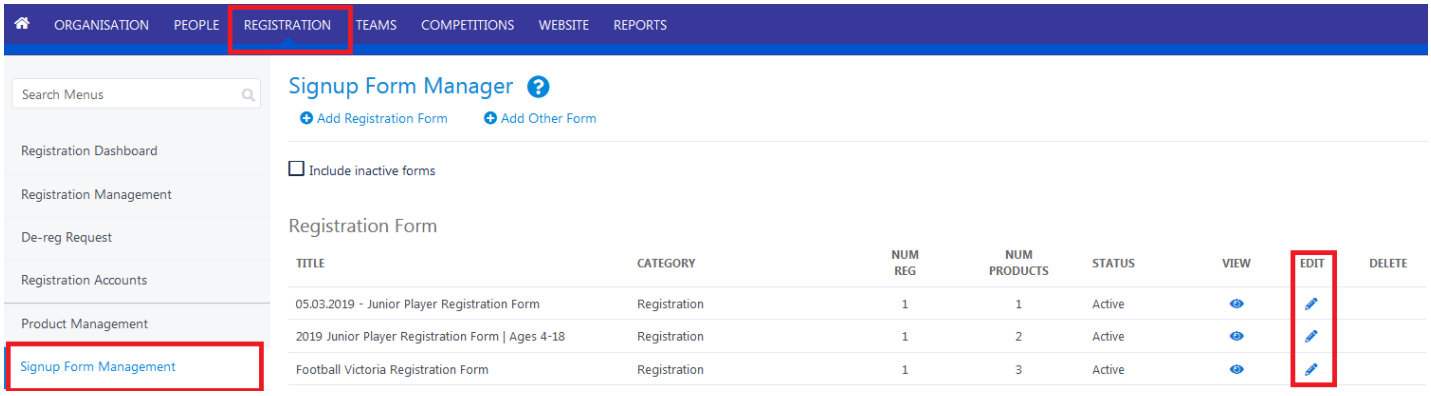


**3rd step:** Select "Competitions" and change "Season" to current season (2020) and click "Go".

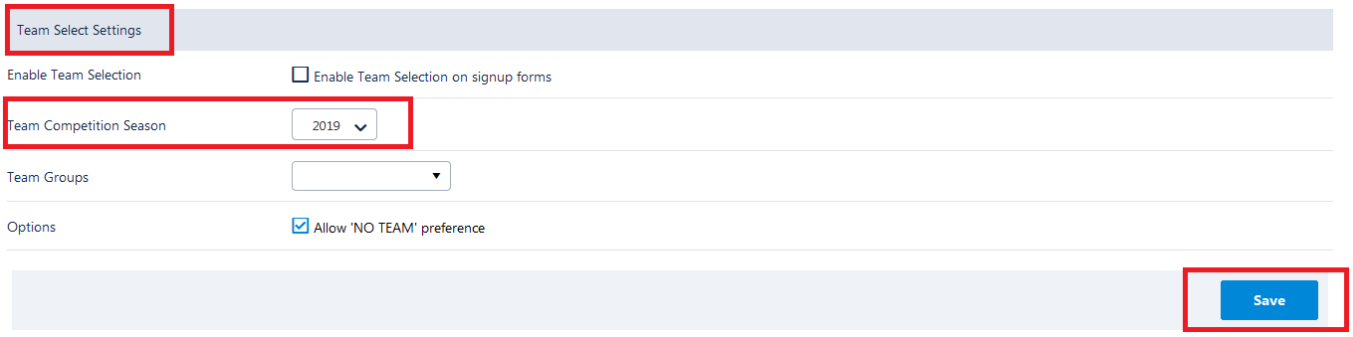



## 8.2 SIGNUP FORM MANAGEMENT

**1st step:** Select "Registration" and choose "Signup Form Management". Click the pencil icon under "edit" for each of your signup forms.

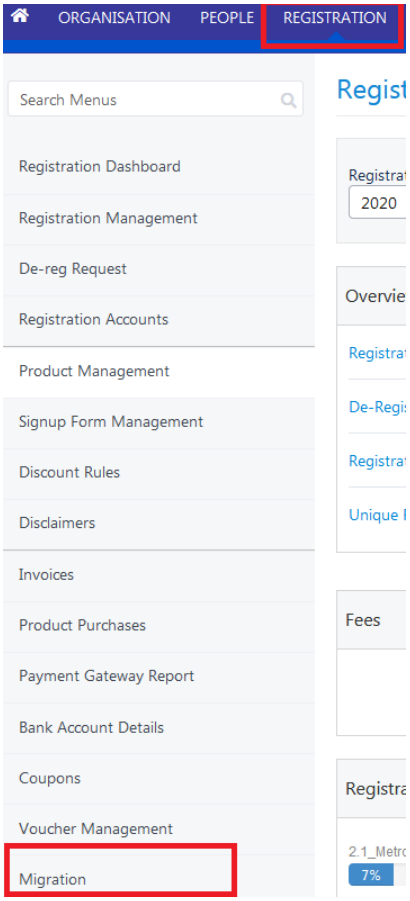



**2nd step:** In each Signup Form, scroll down to the "Team Select Settings" and change the "Team Competition Season" to the current season (2020). Then click "Save"

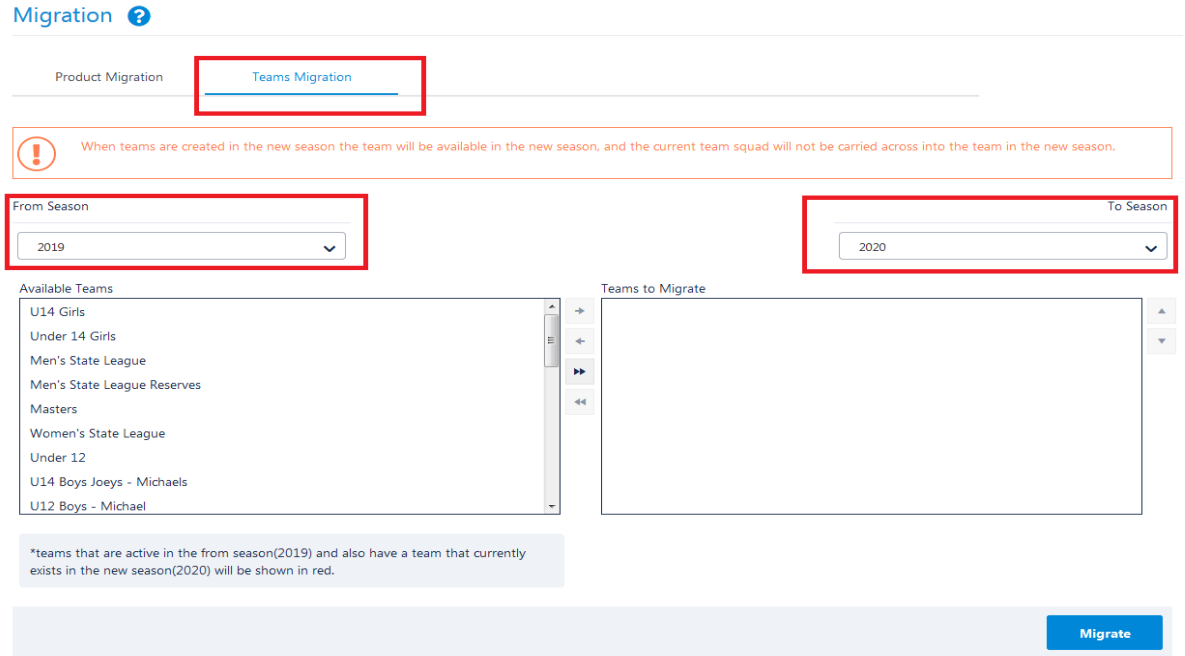


# 8.3 TEAM MIGRATION

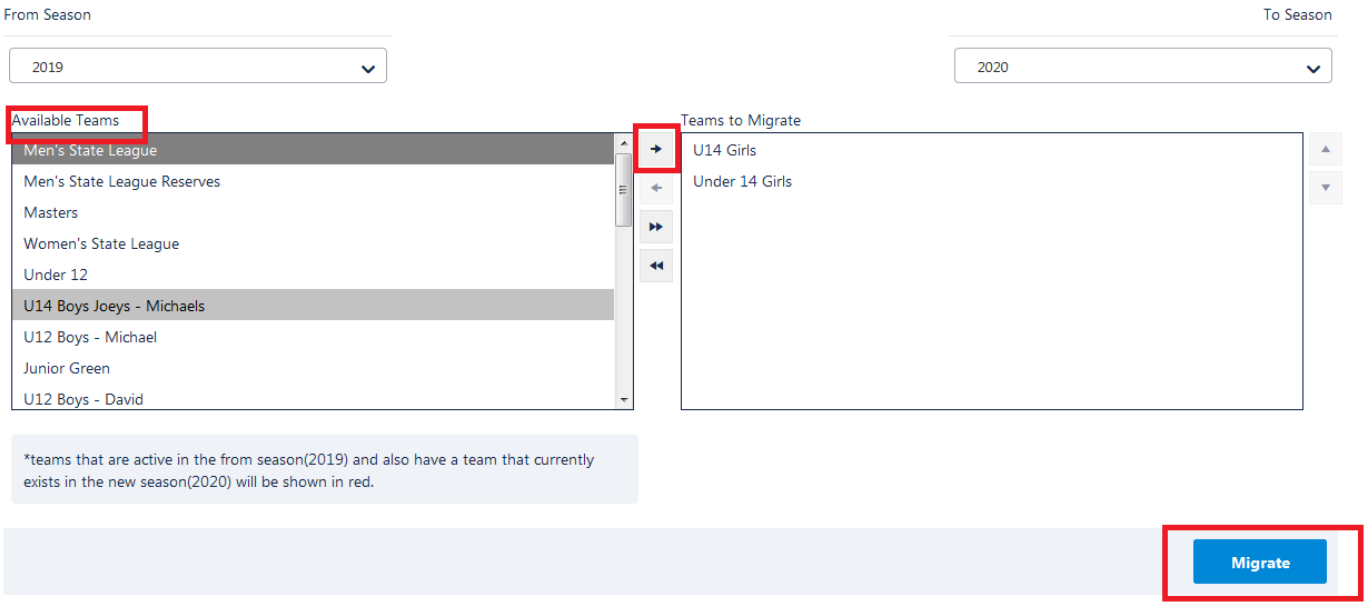
**1st step:** Select "Registration" and choose "Migration".




**2nd step:** Select "Teams Migration" and select the correct years under "From Season" and "To Season".

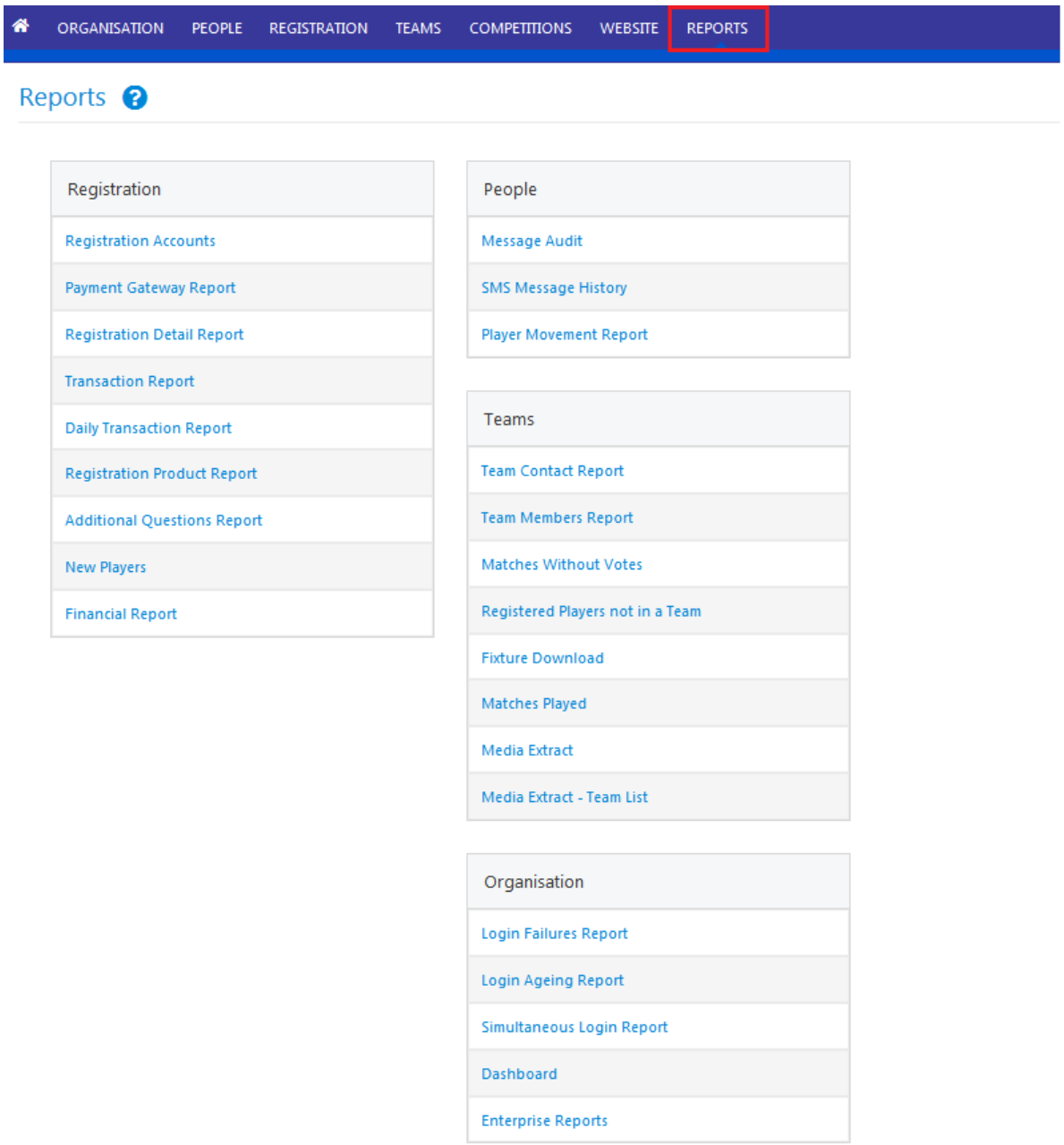


**3rd step:** Select the Teams from "Available Teams" you would like to migrate to the current season using the arrow then click "Migrate".




**4th step:** You can now add members to the teams you have migrated through the "Teams" tab and selecting "Team Management"

# 9.0 REPORTS

## GO TO: REPORT ➡ CHOOSE A SPECFIC REPORT

The "Report" tab will allow you to generate reports in order to gather useful data related to registrations, organisation details and financial information. For example: if you want a detailed summary report of your registrations or if you want to see how many online payments your club took during the registration window. In addition, you can use different filters to manipulate the format of the report. The data of the report can be seen on the Play Football website or be downloaded to excel.