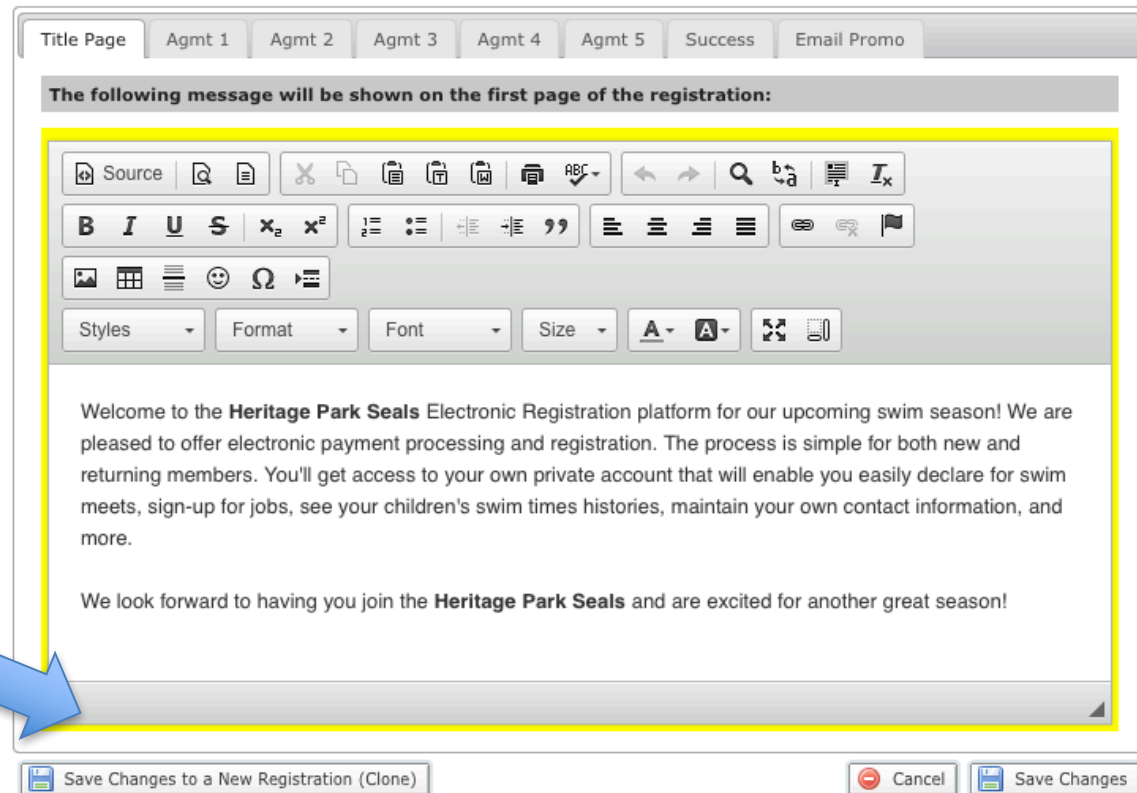# Swim Office

Registration Set Up

Cloning a previous year's registration (for teams that were on TU last year)

Cloning Registration (duplicating your registration from year to year)

- Start on Team Admin> Registration Admin and click on your active Registration Title

- Scroll to the bottom of the page and Click on the button, bottom left: Save Changes to a New Registration (Clone)

- Do not set this registration as CURRENT until you are done making your previous season inactive and ready to turn on your current platform.

Getting Started

- The link below takes you to a series of "how to" videos. They are very helpful.
- For Teams that used this platform last year, please pay special attention to Video 7 and 8 . These will explain how to start a new registration using your previous year's accounts/members.
- Video 8 shows you what to do with swimmers who do not return from a previous year.
- **IT IS IMPORTANT TO WAIT ON MAKING ACCOUNTS/MEMBERS INACTIVE AND CREATING A CLONED REGISTRATION UNTIL YOU ARE DONE USING YOUR PREVIOUS SEASONS DATABASE FOR EMAILING AND CONTACT – THIS STEP SHOULD BE DONE AS CLOSE TO OPENING YOUR NEW/RETURNING REGISTRATION AS POSSIBLE**

REGISTRATION SUPPORT AT TEAM UNIFY? CONTACT:

support@teamunify.com

http://university.teamunify.com/online-registration

IRVINE SWIM LEAGUE

The following slides will walk you through some basic set up of your registration platform AND it will give you the necessary information to capture the league fee ($50) in your team's registration.

It is important that each team is set up this way for league wide functionality.

Questions? director@irvineswimleague.org

Team Profile

- Team Info should be kept accurate
  - Address can be personal team member but can also use ISL address as 5319 University Dr., #302 Irvine, CA 92612
  - Note that phone number does show up in places, so best to use 555.555.5555 or similar

- Adding custom questions to registration in Team Profile tab link here for instruction/video: https://teamunify.uservoice.com/knowledgebase/articles/157601-add-or-ask-questions-in-registration-user-define
- Account Custom Field – Team can use this field (applies to family, not individual swimmer)
- Member Custom Field *– Are you a USA/Year Round Club Swimmer*
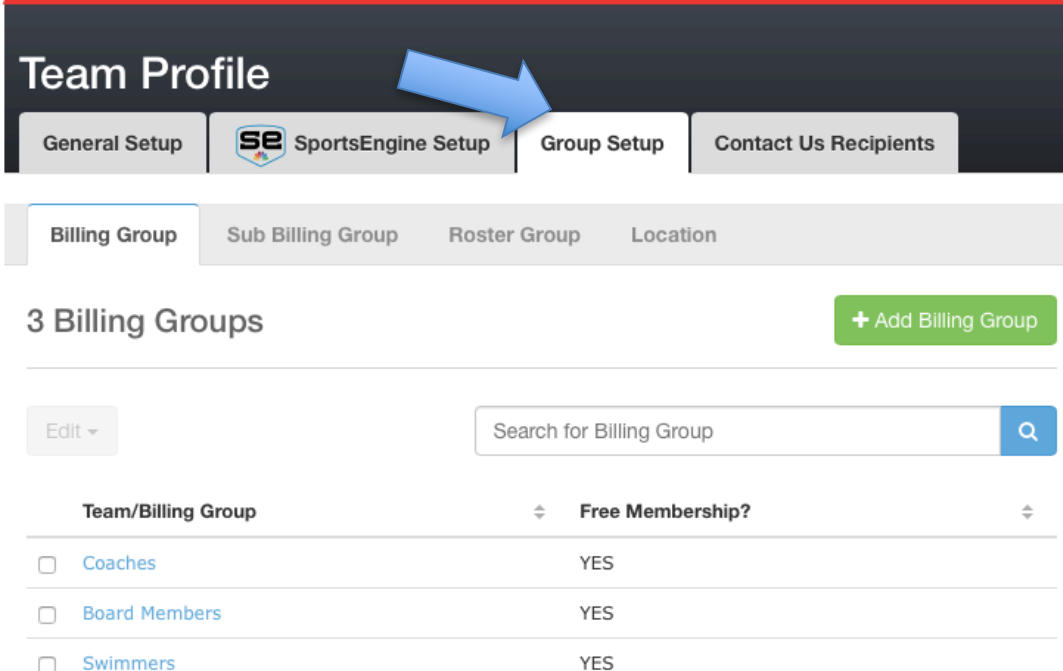
Account Custom Field Label:

Account Field Label

Member Custom Field Label:

Member Field Label

Team Profile-cont.'

Setting up Billing Groups/Roster Groups/Locations and T-shirt Sizes can be done in Team Profile - bottom of screen or you can find these same tabs on the menu bar in Registration Admin (t-shirt sizes excepted):

Click on Setup Billing/Roster Groups/Location:
- Billing Group – can be left blank. Many teams set up 3 groups as Coaches, Board Members and Swimmers
- Roster Groups – Can be set up by group or just put team name: Example: Seals or Orcas
- T-shirt sizes can be determined from general set up

Team Profile-cont.'

LOCATION MUST BE SET UP FOR ISL USE: if cloned, should currently say"ISL Cleared"
ALWAYS CLICK SAVE CHANGES

Adding to Chart of Accounts

For accounting purposes certain chart of accounts (CoA) should be created

- **_PLEASE ADD ONE CHART OF ACCOUNTS FOR LEAGUE/ACCOUNTING PURPOSES:_**
  1. ISL Reg Fee
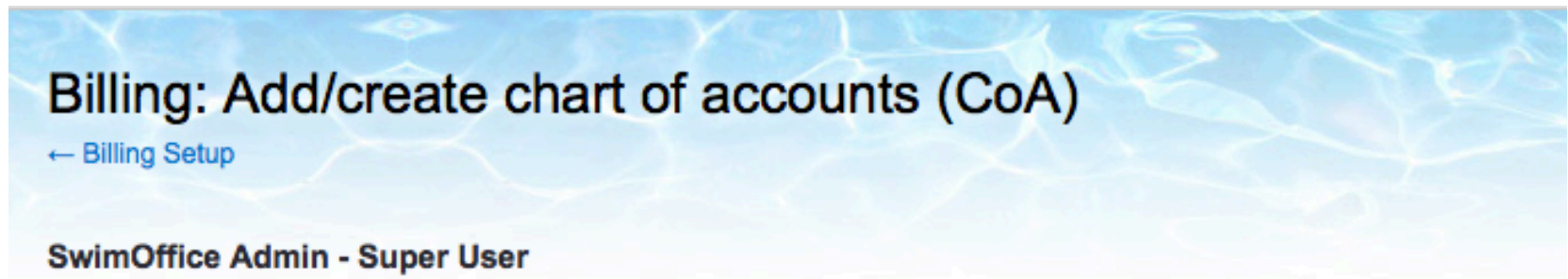
   TO ADD/CREATE CHART OF ACCOUNTS-FOLLOW SCREEN SHOT BELOW:

Billing: Add/create chart of accounts (CoA)

← Billing Setup

SwimOffice Admin - Super User

Here are the steps to create your Chart of Accounts.

1. In the side menu click **Billing Admin > Billing Setup > CoA Setup**.
2. Alternatively, you can access it via **Team Admin > Registration Admin > CoA Setup**.
3. You can either click a CoA already listed to edit it
   OR
   Click **Add New**.
4. Enter the CoA name.
5. Always leave the "Charge Type" as **Normal Charge/Discount**.
6. Click **Save Changes**.

Registration Set-up

Click on Team Admin>Registration Admin and click on ADD NEW
See Screen Shot for suggested settings

- BASIC SET UP TAB: Required settings for ALL TEAMS are:
    - Turn on for Registration: YES
    - Date used to calculate Athlete Age: 6/01/2019
    - Allow returning accounts to add new members: YES (this allows for new siblings to register in returning family registration period)
    - Enforce Age Group: YES
    - Maximum Registrants: 130 (or 120 if a team that limits enrollment to 120)

Registration Set-up cont.'

See Screen Shot for suggested settings

- Required settings for ALL TEAMS are:
  - Member Custom Field: Show and Required If you have custom question: would encourage USA Swimming question)
  - Preferred Name: Required
  - Emergency: Required
  - Parent/Guardian: Show and Require (settings require 2 Parent/Guardian. If only one parent, instruct your families during registration to put same info in both locations)
  - Medical Information: Show and Require
  - Shirts: Can be Show and Require or Show but Optional or Hide. To set up T-shirt sizes, see bottom of Team Profile Page
  - USA Swimming Transfer Question: HIDE ****ALWAYS SAVE CHANGES BEFORE MOVING ON****

*Name used to send receipt emails:	Lizzie Howard
Hide Check Registration Button:	YES
[What school do you attend?] Member Custom Field:	Show and Required
[Preferred First Name] Entry Fields:	Required
[Insurance] Entry Fields:	Optional
[Emergency] Entry Fields:	Required
[Parents/Guardians] Entry Fields:	Show and Required
Medical Information:	Show and Required
Swimsuit Size:	Hide
[Shirts] Entry Field:	Show but Optional
[Warm-up Jacket] Entry Field:	Hide
[Warm-up Pants] Entry Field:	Hide
[Ask USA Swimming Transfer Question] Entry Field:	Hide
Email Notifications to Select Admins when Registration Occurs:	Daily Summary
Admins to Email about new Registrations (comma-separated list of email addresses)::	director@irvineswimleague.org

Registration Set-up cont.'

- See bottom of page for Title Page **ALWAYS SAVE CHANGES BEFORE MOVING ON**
  - This is the text your families will see when they enter the REGISTRATION PLATFORM
    - You may customize the text any way you like
    - **If your team takes credit cards they MUST also take cash/checks**
    - If your team takes checks/cash they DO NOT have to accept credit cards

Registration Set-up cont.'

- See bottom of page for Agmt Tabs ****ALWAYS SAVE CHANGES BEFORE MOVING ON****
  - Agreements 1, 2,3, and 4 will be populated by ISL member
  - All waivers must be set as "REQUIRED" (will be set for you)

Registration Set-up cont.'

- FEE SET UP TAB: Most of this page is team determined, EXCEPT for Registration Groups:
  - Click YES on Registration Groups for Member to Select and ADD NEW:
    - Swimmers 5-18
    - Or you can subdivide your team, if you give discounts to older swimmers, this may be a good option:
      - Swimmers 15-18
      - Swimmers 5-14
      - DISREGARD FUN RACER – No longer necessary
- ****CLICK NEXT> BOTTOM RIGHT CORNER WHEN DONE ON CURRENT PAGE (CHANGES WILL BE SAVED**
- **ON NEXT PAGE)****

Registration Fees Setup

| Basic Setup | Fees Setup | Page Setup |

TU University™ Need help with Online Registration? **Click Here**

Registration Title: Heritage Park Seals - 2017 Registration

▶ **Member Must Select [Location] to Register:** NO

▶ **Setup Payment Options for Groups:** NO

Registration Groups for Member to Select:

Available Groups for Registration:
Fun Racer, Swimmers ages 15-18, Swimmers ages 5-14 » Select
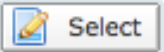
Registration Set-up cont.'

Select Registration Groups

| | ☑ | Add New | Select | | | | Delete |

Page 1 of 1 | 2 | View 1 - 2 of 2

	☑	Registration Group	Age Group	Detail Description
1	☑	Swimmers ages 15-18	15-18	
2	☑	Swimmers ages 5-14	5-14	

Fun racer no longer needed

Registration Set-up cont.'

REQUIRED SET UP- ISL FEE

Click on **+**Add More Per Member Charge

- ISL Fee must be set to $50
- Click box next to ISL Fee box> Edit> change to $50

Registration Set-up cont.'

Per Account (Family) Charge

This can be used to collect Concessions donations or team donations

► Per Account (Family) Charge:				
☐	Charge Name	Required?	Chart of Account	Charge
☐	Family Donation	N	Optional donation	$10.00
☐	Family Donation	N	Optional donation	$20.00

Edit | Add More Per Family Charge | Remove Selected Charge(s)

Registration Set-up cont.'

Multi-Athlete Discount
Note Groups NOT discounted is a nice feature

Multi-Athlete Discount: Yes - Dollar

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

Discount: $ 0.00   for Account registering 2 Athletes.
Discount: $ 100.00   for Account registering 3 Athletes.
Discount: $ 200.00   for Account registering 4 Athletes.
Discount: $ 300.00   for Account registering 5 Athletes.

Chart of Account: Multi Swimmer Discount

Groups NOT discounted: Swimmers ages 15-18   [Pick]

Registration Set-up cont.'

Additional Fee/Discount Question

This section can be used to charge certain members an extra fee or discount, such as non-residents or coaches ~~but these fees apply to the account,~~ not the member https://teamunify.uservoice.com/knowledgebase/articles/58822-how-do-i-implement-a-yes-no-question-to-adjust-the

ALWAYS CLICK SAVE CHANGES

See screen shots for examples:

▶ **Additional Fee / Discount Question:** YES ⬍

Question: Are you an HP Resident?

Answer NO ⬍ to charge the fee

Fee/Discount Name: Non-Resident Fee

Fee to charge: $ 25.00 **[Use negative sign (e.g., -10.00) in front of the number for defining a discount]**

Chart of Account: Annual Reg Fee ⬍

▶ **Additional Fee / Discount Question:** YES ⬍

Question: Are you a Swimmer/Coach

Answer YES ⬍ to charge the fee

Fee/Discount Name: Swimmer/Coach Discount

Fee to charge: $ -75.00 **[Use negative sign (e.g., -10.00) in front of the number for defining a discount]**

Chart of Account: Annual Reg Fee ⬍

Getting your Registration on your Home Page – COMMAND BUTTON

- Creating the Command Button: REGISTRATION
- Team Admin>Website Design> Website Layout Configuration> Scroll to bottom> Command Button Controls> Click on Command Buttons
- Maximum Command Buttons is 4
- Click dropdown and select Online Registration> Enter Custom Label and Edit Icon
- BE SURE TO SAVE AT BOTTOM OF PAGE

Command Button Controls

| Main Photos | Command Buttons | Main Text |

Command Buttons:
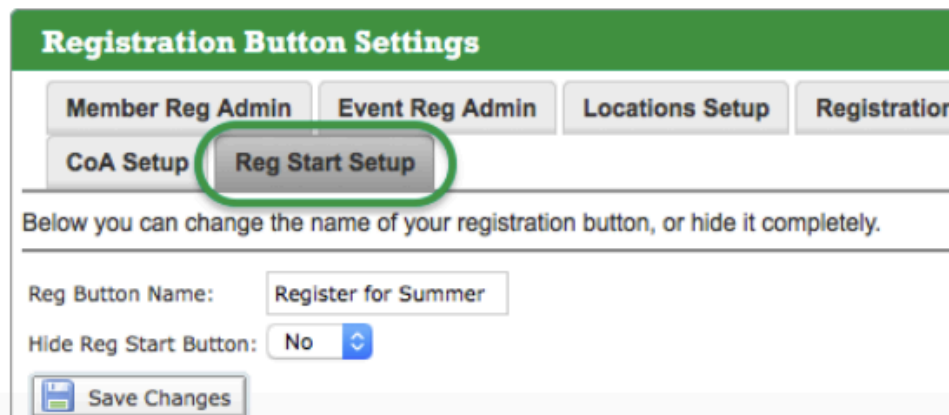
1: Online Registration | Label: ONLINE REGISTR/ Open in: A Popup Win | Icon Edit:
2: [Do Not Show]
3: Team Calendar | Label: CALENDAR | Open in: Current Win/Tab | Icon Edit:
4: Coaches | Label: COACHES | Open in: Current Win/Tab | Icon Edit:

Getting your Registration on your Home Page – Via the Sign In Area
(typically done with Command Button – this is not necessary)

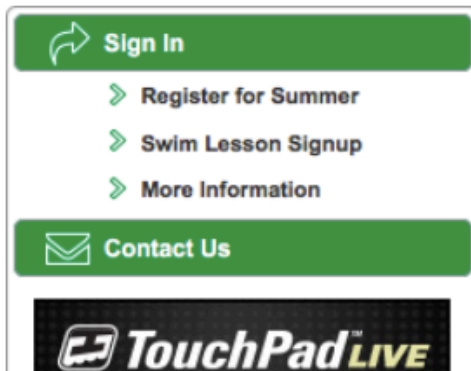When Online Registration is active, by default a **Start Registration** button/link will appear under the *Sign In* button, or under the *System* button when logged in. If desired, you can either rename it to something like below, or hide it altogether and provide your own navigation to that page, such as with a home page command button or a link on a web page.

1. Go to Registration Admin.
    a. Chameleon users: In the side menu click **Team Admin > Registration Admin**.
    b. New CMS users: In the side menu click **Team Tools > Registration Admin**.
2. Click **Reg Start Setup** tab.

Turning on Registration
Turn on in registration management and set the correct dates
Be sure 2019 Registration is set as CURRENT (next page)

TU University™ Need help with Online Registration? **Click Here**

*Registration Title: (Show externally to the Users)	Heritage Park Seals - 2019 Registration
*Short Title: (Used internally by the System)	Registration (<= 20 characters)
*Turn on for Registration:	YES
Date used to calculate Athlete's Age:	06/01/2019 (Leave it blank to use the date of the member registers) Hide this field NO
*Open For Returning Members:	03/01/2019 ~ 06/30/2019 Hide this field NO
Allow returning accounts to add new members regardless of the setting in 'Open for New Members':	YES
*Open For New Members:	03/10/2019 ~ 06/30/2019 Hide this field NO
*Display on SportsEngine?	○Yes ●No ?

Turning on Registration (cont')
Set as Current

Member Registration Admin

| Member Reg Admin | Event Reg Admin | Locations Setup | Registration Groups Setup |

| Payment Options Setup | CoA Setup | Reg Start Setup |

TU University Need help with Online Registration? **Click Here**

Red item denoted by * is the CURRENT registration. You can only have one CURRENT registration, which can be signed up by the Member if it is turned **ON**. If you would like **more than 1 registration Active** at the same time please click here to learn how.

⊕ Add New   ✎ Set as CURRENT   ↻ Undelete   ✖ Delete

|◄ ◄◄ Page 1 of 1 ►► ►| 4 ⬍   View 1 - 4 of 4

		Registration Title	Status			Open to Returning	Open to New Mem	AgeGroup	M
1	☑	* Heritage Park Seals - 201	ON		Manage	3/1/19 - 6/30/19	3/10/19 - 6/30/19	Enforced	
2	☐	Heritage Park Seals - 2018	OFF		Manage	2/28/18 - 6/30/18	3/8/18 - 6/30/18	Enforced	
3	☐	Heritage Park Seals - 2017	OFF		Manage	3/1/17 - 6/30/17	3/1/17 - 6/30/17	Enforced	
4	☐	Heritage Park Seals - 2016	OFF		Manage	3/1/16 - 6/30/16	3/1/16 - 6/30/16	Enforced	

Thanks for all you are doing to keep your team running smoothly

QUESTIONS:

director@irvineswimleague.org