

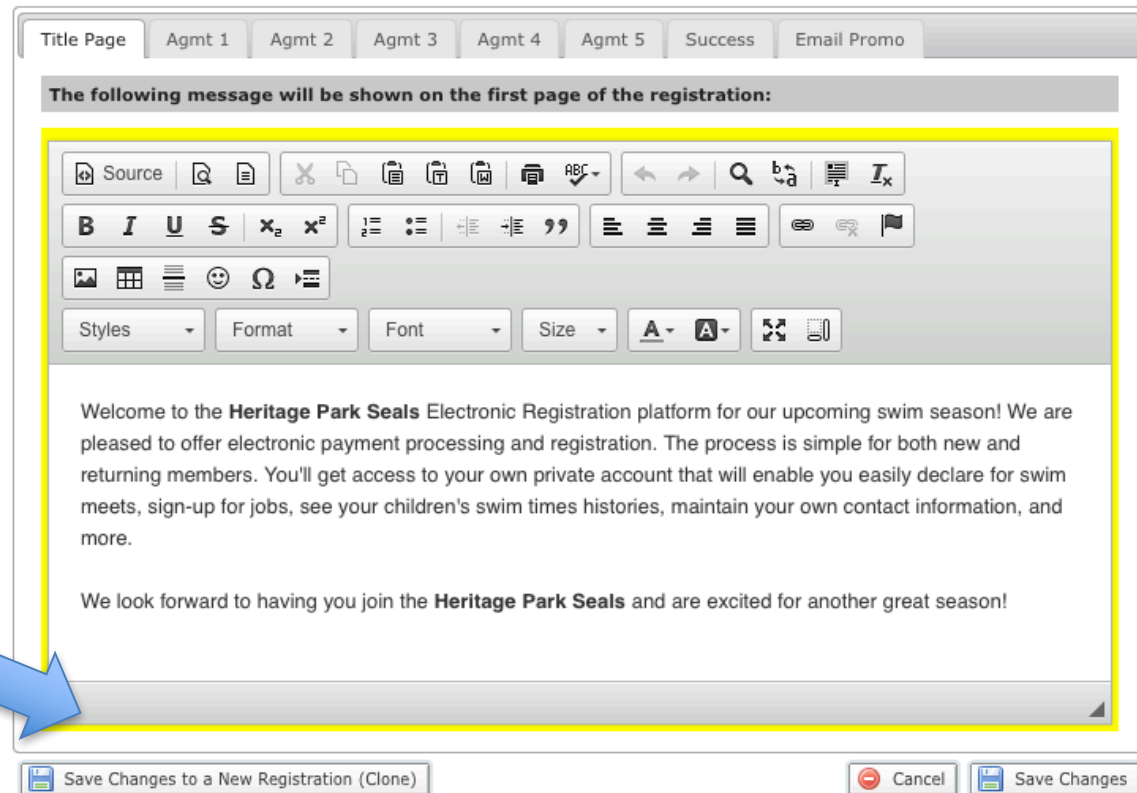


Swim Office
Registration Set Up

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.



The screenshot shows a web interface for cloning a registration. At the top, there are tabs: Title Page, Agmt 1, Agmt 2, Agmt 3, Agmt 4, Agmt 5, Success, and Email Promo. Below the tabs, a message states: "The following message will be shown on the first page of the registration:". The main content area is a rich text editor with a yellow border. It contains a welcome message for the "Heritage Park Seals" electronic registration platform. The text reads: "Welcome to the **Heritage Park Seals** Electronic Registration platform for our upcoming swim season! We are pleased to offer electronic payment processing and registration. The process is simple for both new and returning members. You'll get access to your own private account that will enable you easily declare for swim meets, sign-up for jobs, see your children's swim times histories, maintain your own contact information, and more." Below this, it says: "We look forward to having you join the **Heritage Park Seals** and are excited for another great season!". At the bottom of the editor, there are buttons for "Save Changes to a New Registration (Clone)", "Cancel", and "Save Changes". A blue arrow points to the "Save Changes to a New Registration (Clone)" button.

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>



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:

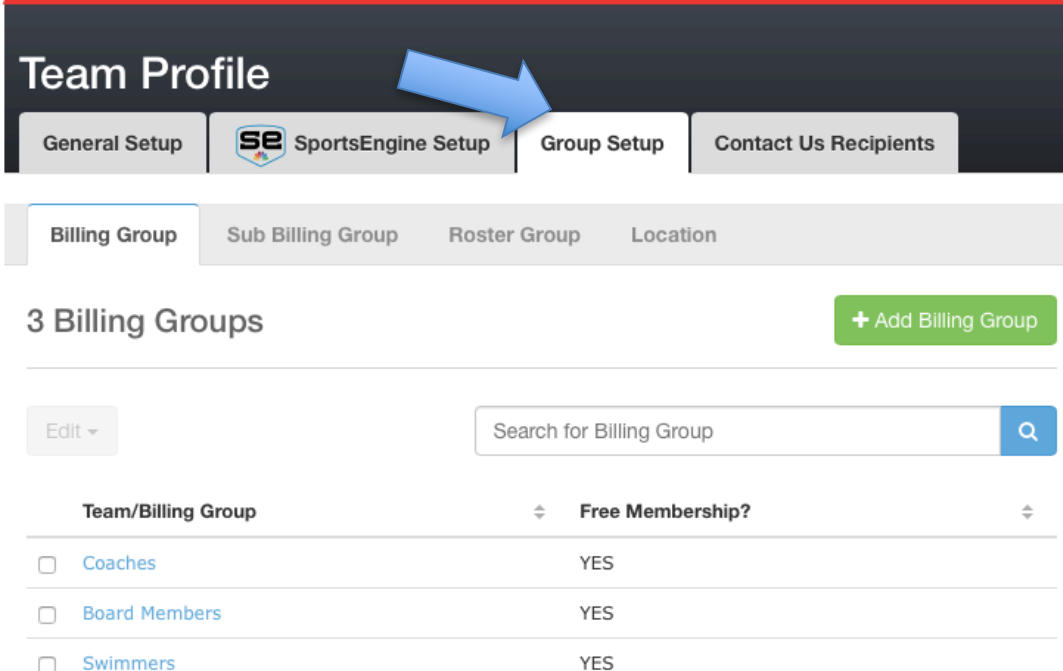
Account Field Label

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):



Team Profile

General Setup **SE SportsEngine Setup** **Group Setup** Contact Us Recipients

Billing Group Sub Billing Group Roster Group Location

3 Billing Groups [+ Add Billing Group](#)

Edit ▾ Search for Billing Group 🔍

Team/Billing Group	Free Membership?
<input type="checkbox"/> Coaches	YES
<input type="checkbox"/> Board Members	YES
<input type="checkbox"/> Swimmers	YES

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****

Team Profile

General Setup

 SportsEngine Setup

Group Setup

Contact Us Recipients

Billing Group

Sub Billing Group

Roster Group

Location

1 Location

+ Add Location

Edit ▾


Q

Location

▾

☐ ISL Cleared

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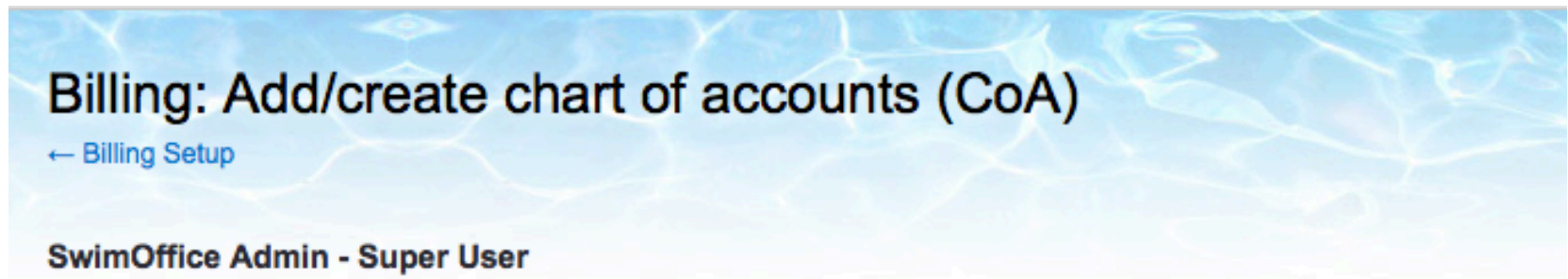
Adding to Chart of Accounts

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:



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)

Member Registration Setup

Basic Setup Fees Setup Page Setup

TU University Need help with Online Registration? [Click Here](#)

*Registration Title: (Show externally to the Users)

*Short Title: (Used internally by the System) (<= 20 characters)

*Turn on for Registration:

Date used to calculate Athlete's Age: (Leave it blank to use the date of the member registers) Hide this field

*Open For Returning Members: ~ Hide this field

Allow returning accounts to add new members regardless of the setting in 'Open for New Members':

*Open For New Members: ~ Hide this field

~~NEW~~ Enforce Age Group Defined by Registration Group:

*Maximum Registrants: ☒ Global Limit (0 or [Blank] for unlimited) ☐ Per Registration Group Limit Hide this field

*Email Address used to send receipt emails:

*Name used to send receipt emails:

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:

Hide Check Registration Button:

[What school do you attend?] Member Custom Field:

[Preferred First Name] Entry Fields:

[Insurance] Entry Fields:

[Emergency] Entry Fields:

[Parents/Guardians] Entry Fields:

Medical Information:

Swimsuit Size:

[Shirts] Entry Field:

[Warm-up Jacket] Entry Field:

[Warm-up Pants] Entry Field:

[Ask USA Swimming Transfer Question] Entry Field:

Email Notifications to Select Admins when Registration Occurs:

Admins to Email about new Registrations (comma-separated list of email addresses):

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



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

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

We look forward to having you join the **Heritage Park Seals** and are excited for another great season!

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)

The screenshot shows a web-based registration setup interface. At the top, there are tabs for 'Title Page', 'Agmt 1', 'Agmt 2', 'Agmt 3', 'Agmt 4', 'Agmt 5', 'Success', and 'Email Promo'. A blue arrow points to the 'Agmt 1' tab. Below the tabs, there are two dropdown menus: 'Enable Agreement I:' set to 'YES' and 'Agreement Type:' set to 'Required'. The 'Agreement Type:' dropdown is circled in blue. Below these is a text input field for 'Title:' with the value 'Medical Release Waiver'. The main content area is a rich text editor with a toolbar containing various icons for text formatting, alignment, and insertion. The text area contains two paragraphs of waiver text. At the bottom, there are three buttons: 'Save Changes to a New Registration (Clone)', 'Cancel', and 'Save Changes'. The 'Save Changes' button is circled in blue.

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

Enable Agreement I: YES Agreement Type: Required

Title: Medical Release Waiver

I certify that I am the parent or legal guardian for my child(ren). I hereby give my permission for any supervisor, coach or other team administrator associated with the **Heritage Park Seals** to seek and give appropriate medical attention for our child(ren) in the event of accident, injury, illness. I will be responsible for any and all costs associated with any necessary medical attention and/or treatment.

I hereby waive, release and forever discharge **Heritage Park Seals** and associated supervisor, coach or other team administrator from all rights and claims for damages, injury, loss to person or property which may be sustained or occur during participation in **Heritage Park Seals** activities, whether or not damages or loss is due to negligence. I hereby acknowledge that my children is (are) physically fit and capable of participation

Save Changes to a New Registration (Clone) Cancel Save Changes

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



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:

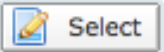
Fun Racer, Swimmers ages 15-18, Swimmers ages 5-14


» [Select](#)

Registration Set-up cont.'

Select Registration Groups

 Add New

 Select

 Delete

Page 1 of 1

2

View 1 - 2 of 2

	<input checked="" type="checkbox"/>	Registration Group	Age Group	Detail Description
1	<input checked="" type="checkbox"/>	<u>Swimmers ages 15-18</u>	15-18	
2	<input checked="" type="checkbox"/>	<u>Swimmers ages 5-14</u>	5-14	

Fun racer no longer needed

Registration Set-up cont.'

****REQUIRED SET UP**- ISL FEE**




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

► **Per Member (Athlete) Charge:**

Group	Chart of Account	ALL Locations
Swimmers ages 15-18	Annual Reg Fee	\$ 140.00
Swimmers ages 5-14	Annual Reg Fee	\$ 240.00

Other Per Member (Athlete) Charges:

<input type="checkbox"/>	Charge Name	Required?	Registration Group(s)	Chart of Account	Charge
<input checked="" type="checkbox"/>	ISL Fee	Y	Swimmers ages 15-18,Swimmers a	ISL Reg Fee	\$50.00

 Edit  Add More Per Member Charge  Remove Selected Charge(s)

- 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:


<input type="checkbox"/>	Charge Name	Required?	Chart of Account	Charge
<input type="checkbox"/>	Family Donation	N	Optional donation	\$10.00
<input type="checkbox"/>	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:** 


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

Discount: \$ for Account registering 2 Athletes.

Discount: \$ for Account registering 3 Athletes.

Discount: \$ for Account registering 4 Athletes.

Discount: \$ for Account registering 5 Athletes.

Chart of Account: 

Groups NOT discounted: [\[Pick\]](#)


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

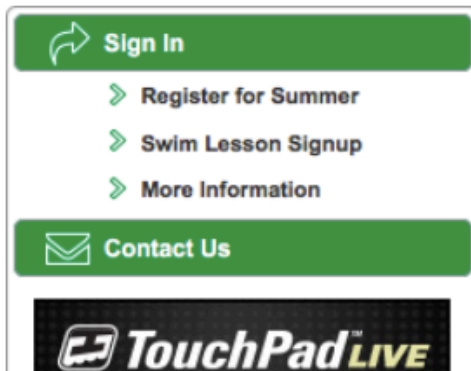
Main Photos **Command Buttons** Main Text

Command Buttons:

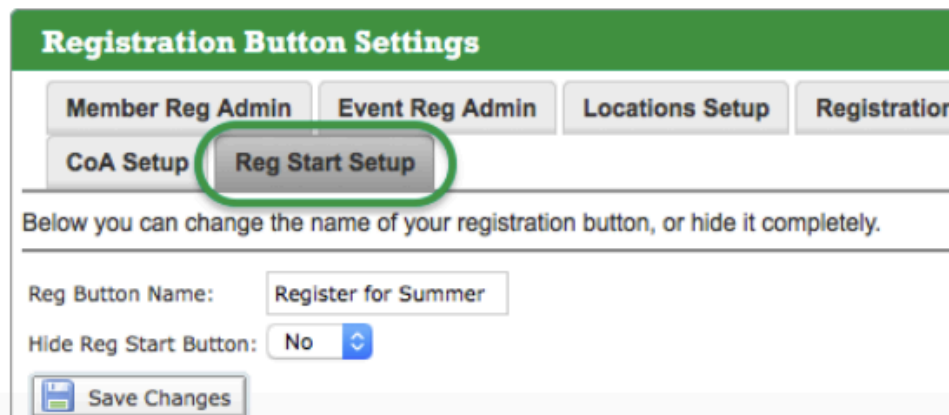
1:	Online Registration	Label: ONLINE REGISTR	Open in: A Popup Win	Icon Edit:	
2:	[Do Not Show]				
3:	Team Calendar	Label: CALENDAR	Open in: Current Win/Tab	Icon Edit:	
4:	Coaches	Label: COACHES	Open in: Current Win/Tab	Icon Edit:	

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.



Registration Button Settings

Member Reg Admin Event Reg Admin Locations Setup Registration

CoA Setup **Reg Start Setup**

Below you can change the name of your registration button, or hide it completely.


Reg Button Name:

Hide Reg Start Button:

Turning on Registration

Turn on in registration management and set the correct dates

Be sure 2019 Registration is set as CURRENT (next page)

 Need help with Online Registration? [Click Here](#)

***Registration Title:**
(Show externally to the Users)

***Short Title:**
(Used internally by the System) (<= 20 characters)

***Turn on for Registration:**

Date used to calculate Athlete's Age: (Leave it blank to use the date of the member registers) Hide this field

***Open For Returning Members:** ~ Hide this field

Allow returning accounts to add new members regardless of the setting in 'Open for New Members':

***Open For New Members:** ~ Hide this field

***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



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

View 1 - 4 of 4

	<input type="checkbox"/>	Registration Title	Status		Open to Returning	Open to New Mem	AgeGroup	M
1	<input checked="" type="checkbox"/>	* Heritage Park Seals - 201	ON	Manage	3/1/19 - 6/30/19	3/10/19 - 6/30/19	Enforced	
2	<input type="checkbox"/>	Heritage Park Seals - 2018	OFF	Manage	2/28/18 - 6/30/18	3/8/18 - 6/30/18	Enforced	
3	<input type="checkbox"/>	Heritage Park Seals - 2017	OFF	Manage	3/1/17 - 6/30/17	3/1/17 - 6/30/17	Enforced	
4	<input type="checkbox"/>	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