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Welcome to Affinity Sports

Welcome to the Team Sports HQ – Affinity Sports Platform. As a part of DICK'S Sporting Goods, family of businesses, sports is at the heart of our business. We believe that "Sports Matter" and providing access to sports is a key priority for us.

About Us

Team Sports HQ – Affinity Sports is a wholly owned subsidiary of DICK'S Sporting Goods. In business since 2002, Affinity Sports joined DICK'S Sporting Goods in August 2016 and together with Blue Sombrero, a leader in online registration for youth sports, and Game Changer, a sports statistics and gaming app developer, makes up the Team Sports HQ Technology Division. Team Sports HQ currently has approximately 300 employees with offices in Atlanta, GA, New York, NY, Pittsburgh, PA, and San Diego, CA.

About this Guide

This Getting Started Guide provides Registrars with an overview of various functions of the Affinity Sports Platform.

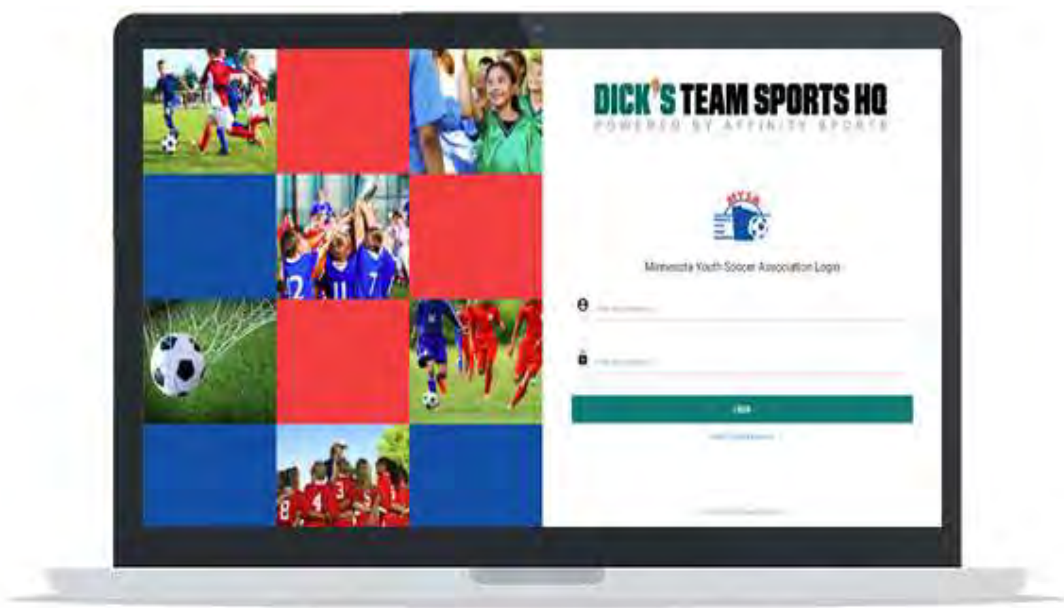
This guide focuses on general system use and sections. We outline season configurations, how to manage players, administrators and teams, and compliance requirements.

We also provide TIPS and NOTES throughout this guide, to assist you in the use of the Affinity Sports Platform.

Accessing the Affinity Sports Platform

To get started, navigate your browser to https://mnyouth.sportsaffinity.com

1. Enter your user name and password.
2. Your access is based on your current role and credentials.

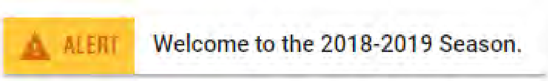


- To access your Association's help center choose Help below the login button.
- To reset your password click Forgot password below the login button and follow the instructions.

TIP: Passwords must be either 7 or 8 characters in length. Passwords must contain one or more UPPER case, one or more lower case and one or more digits (0-9)

NOTE: State level users do not have access to the reset password feature. State level users must call the customer support line to reset their password.

The Welcome page may display Alert Messages.



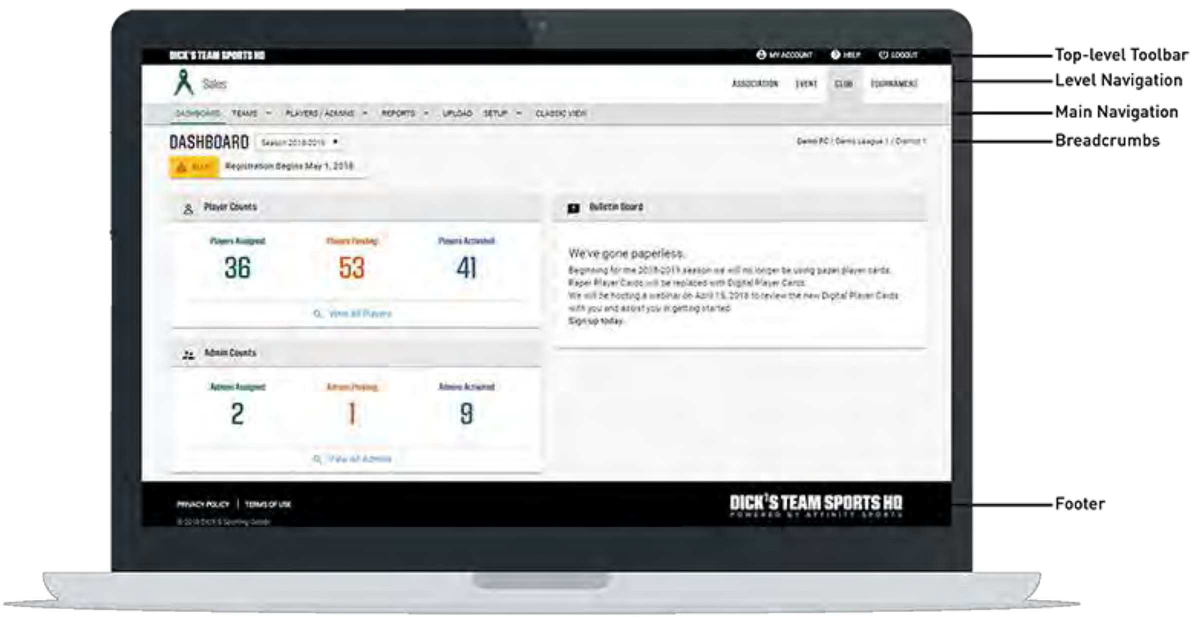
These messages are managed by the State office and may include notifications about deadlines, policy changes, etc., or announcements from the State office or from Affinity Sports.

Navigating the Affinity Sports Platform

Upon log in you will be taken to a Dashboard based on your user access and role in the Association.

The Affinity Sports Platform navigation consists of the following components:

- Season Dropdown
- Top Toolbar
- Level Navigation
- Main Navigation
- Breadcrumbs
- Footer



Top Toolbar

The Top toolbar includes a link to access your user profile by choosing My Account, a link to your Association's Help Center, and a link to logout of the Affinity Sports Platform.

Level Navigation

The Level Navigation is located in the upper right of your browser window. The Level Navigation displays the level of the system in which you are accessing. The levels that display are based on your user access and role in the Association.

Season Dropdown

The Season Dropdown allows you to toggle between seasons. If you are coordinating more than one season at a time, make sure that the correct season is selected from the dropdown menu on the left side of your screen.

Breadcrumbs

Breadcrumbs are located in the upper right of your browser window and serve as a wayfinding tool by indicating the dashboard being visited and its corresponding hierarchy.

Main Navigation

The Main Navigation provides access to the core functions and actions within the Affinity Sports Platform. This navigation is based on your user access and role in the Association.

Dashboard

Dashboard will take you back to your main dashboard based on your user access and role in the Association.

Teams

Teams provides you with the ability to complete Team Lookup, Create Teams, Access the Team Creation Matrix, Travel Requests, Core Checking and Declare Multi Teams.

Players/Admins

Players/Admins provides access to Player Lookup, Admin Lookup, and Parent Lookup, and the ability to add a Player/Admin, manage player applications and payments, and access ID Cards.

Reports

Reports provides access to save reports and a number of templated reports in the State Platform.

Setup

Setup allows you to set up your season by choosing Config from the dropdown menu or to access Sanctioned Tournaments. State level users can also impersonate users from this area of the main navigation.

Classic View

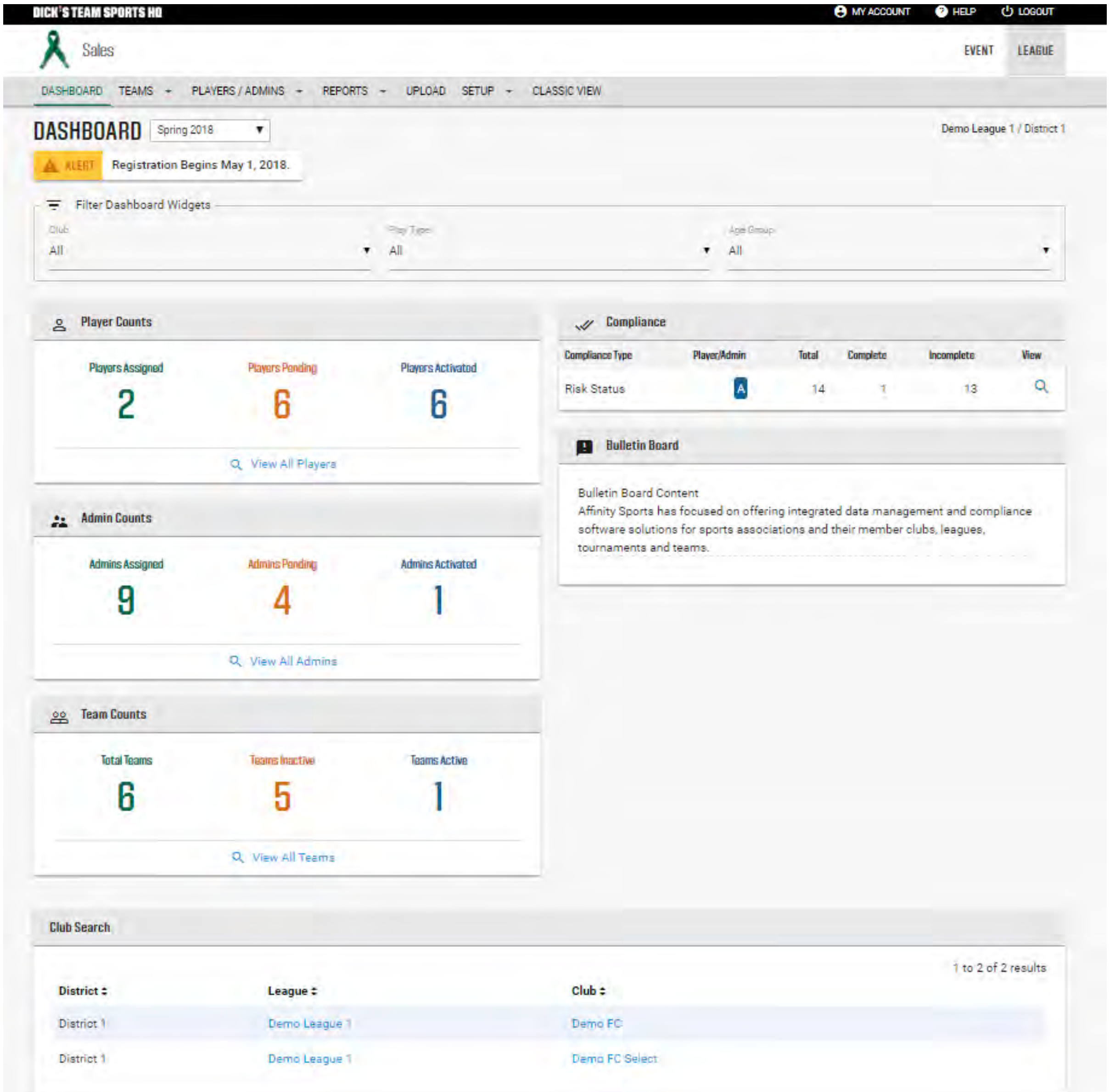
Classic View takes you to the classic Affinity Sports Platform look and feel.

Footer

The footer provides access to our Privacy Policy and Terms of Use.

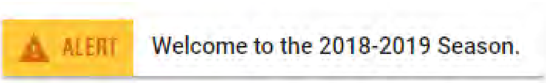
Dashboards & Widgets

Upon log in to the Affinity Sports Platform, you will be taken to a Dashboard based on your role in the Association.



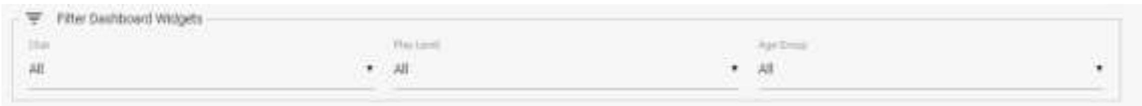
Dashboard Alert

The Dashboard will include any alert messages from the State office or Affinity Sports. This alert is visible on State, District, Club and Club Detail level dashboards.



Filter Dashboards by Club, Play Type and Age Group

The Filter Dashboards search feature allows you to display widget content by Club Detail. You will also be able to filter by Play Type and Age Group.



To filter, choose the club and/or the Play Type and Age Group by clicking the search field to display a dropdown menu.

This widget is available at the Club level.

Player Counts Widget

The Player Counts Widget provides a quick snapshot of Players Assigned to a team, Players Pending; that are not on a team, and Players on an activated team.

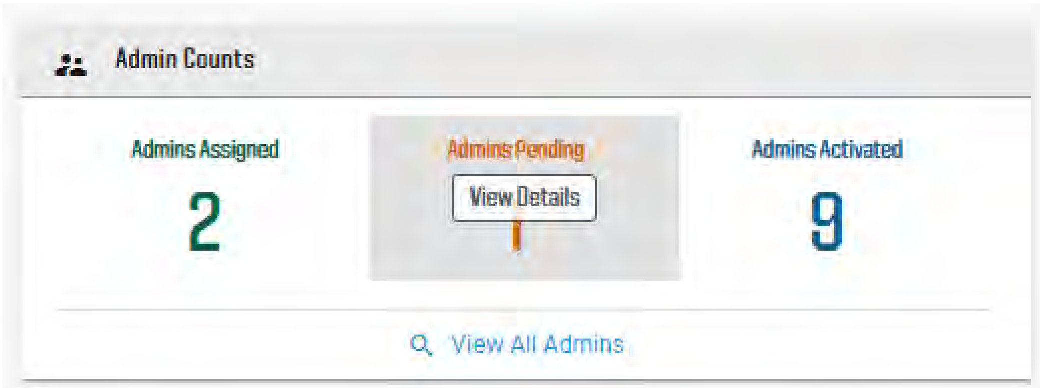
To view each of these player groups in more detail, mouse over the number in the widget, and then choose More Details and you will be taken to the Player Lookup screen that will display a full list of players that meet the selected criteria. To drill down further, you may click on the name of the player to view that player's record.

To view all players, regardless of status, you can choose View All Players and be taken to the Player Lookup screen.

This widget is available at the Club and Club Detail level.

Admin Counts Widget

The Admin Counts Widget provides a quick snapshot of Admins Assigned to a team, Admins Pending; that are not on a team, and Admins on an activated team.



To view each of these admin groups in more detail, mouse over the number in the widget, and then choose More Details and you will be taken to the Admin Lookup screen and a full list of admins that meet the selected criteria. To drill down further, you may click on the name of the admin to view that admin's record.

To view all admins regardless of status, you can choose View All Admins and be taken to the Admin Lookup screen.

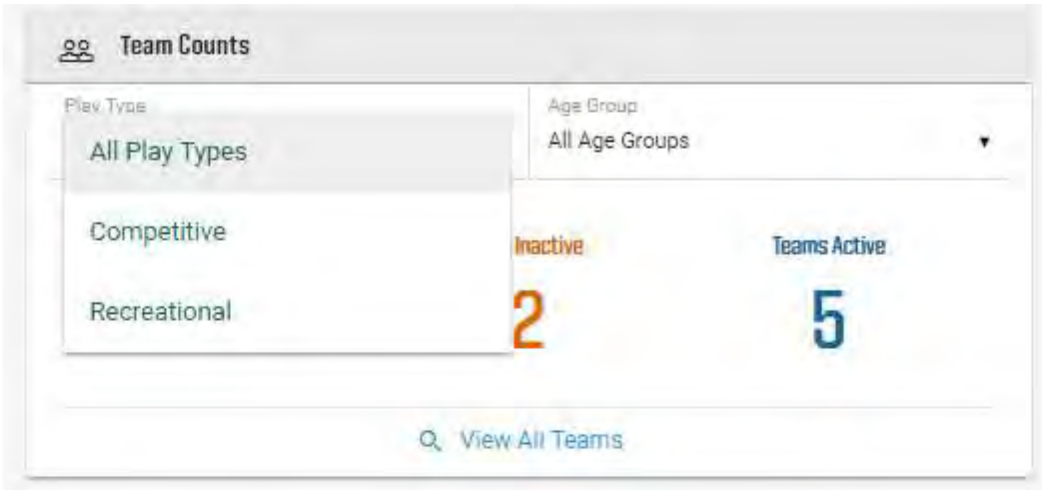
This widget is available at the Club and Club Detail level.

Team Counts Widget

The Team Counts Widget provides a quick snapshot of Total Teams, Inactive Teams and Active Teams.

To view the team groups in more detail, mouse over the number in the widget, and then choose More Details and you will be taken to the Team Lookup screen and a full list of teams that meet the selected criteria. To drill down further, you may click on the name of the team to view and manage that team.

You may also filter this criteria by Play Type and then corresponding Age Groups.



To view all teams regardless of status, you can choose View All Teams and be taken to the Team Lookup screen.

This widget is available at the Club and Club Detail level.

Compliance Widget

The Compliance Widget will display on the Club and Club Detail level dashboards and provides a quick view of Electronic Legal Agreement Status (ELA) and Risk Status for Administrators (if applicable).

Users will also have the ability to view a detailed list of individuals with the various compliance types/status and email them from a summary screen.

This widget is available at the Club and Club Detail level.

Compliance

Compliance Type	Player/Admin	Total	Complete	Incomplete	View
Important Policy Information	P	8	3	5	
Important Policy Information	A	4	0	4	
Coaches Code of Conduct	A	4	0	4	
Risk Status	A	4	2	2	

Compliance Types: Displays the title of the ELAs in the Assign PDF/ ELA area of your Club, League, State or National Governing Body configuration.

Player/Admin: P icon will display to indicate the compliance type is assigned to Players and an A icon will display to indicate the compliance type is assigned to Admins.

Total: represents the total number of application requirements under this compliance type. Please note, if a player/ admin has multiple applications they may display multiple times within the compliance type.

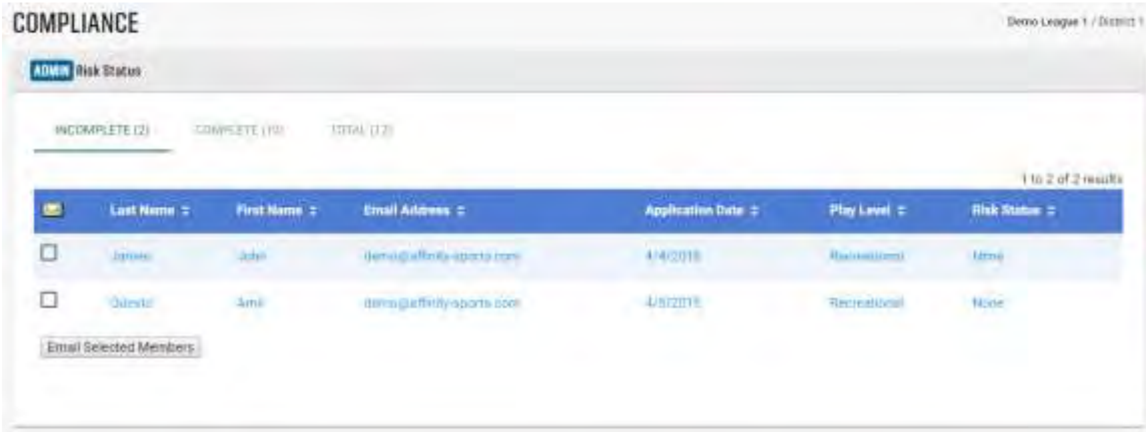
Complete: will indicate the amount of individuals who have satisfied the requirement by signing the ELA or who are marked as having an Approved Risk Status. (if applicable)

Incomplete: will indicate the amount of individuals who have not satisfied the requirement of signing the ELA or who are not marked as having an Approved Risk Status. (if applicable)

View: By clicking on the magnifying glass you will be taken to a Summary Page for the respective compliance type.

Summary Page

On the summary page, you can view the individuals who are incomplete, complete and the total of both categories.



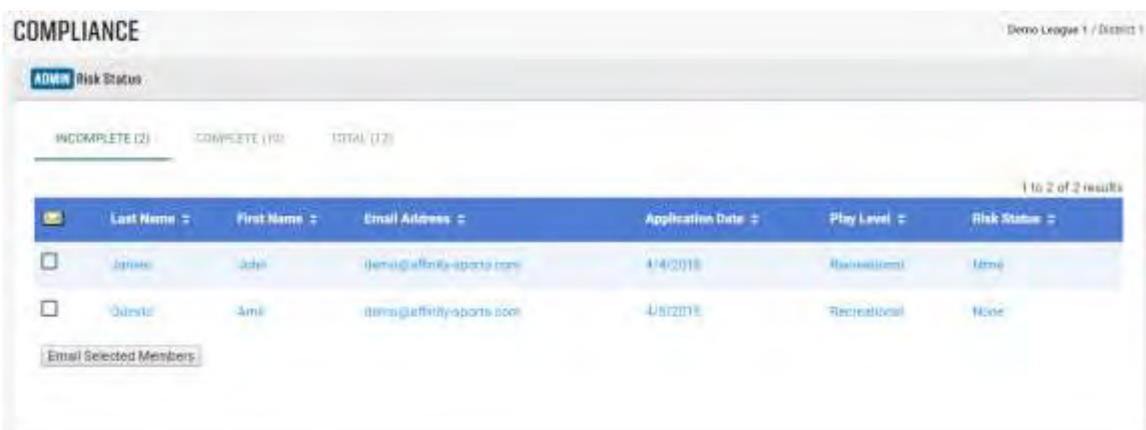
The ELA Summary Page content can be filtered by player or admin first name or last name, email address, application date, play level. The Risk Status Summary Page content can be filtered by player or admin first name or last name, email address, application date, play level and risk status.

Note: The Summary Page content may display across multiple pages.

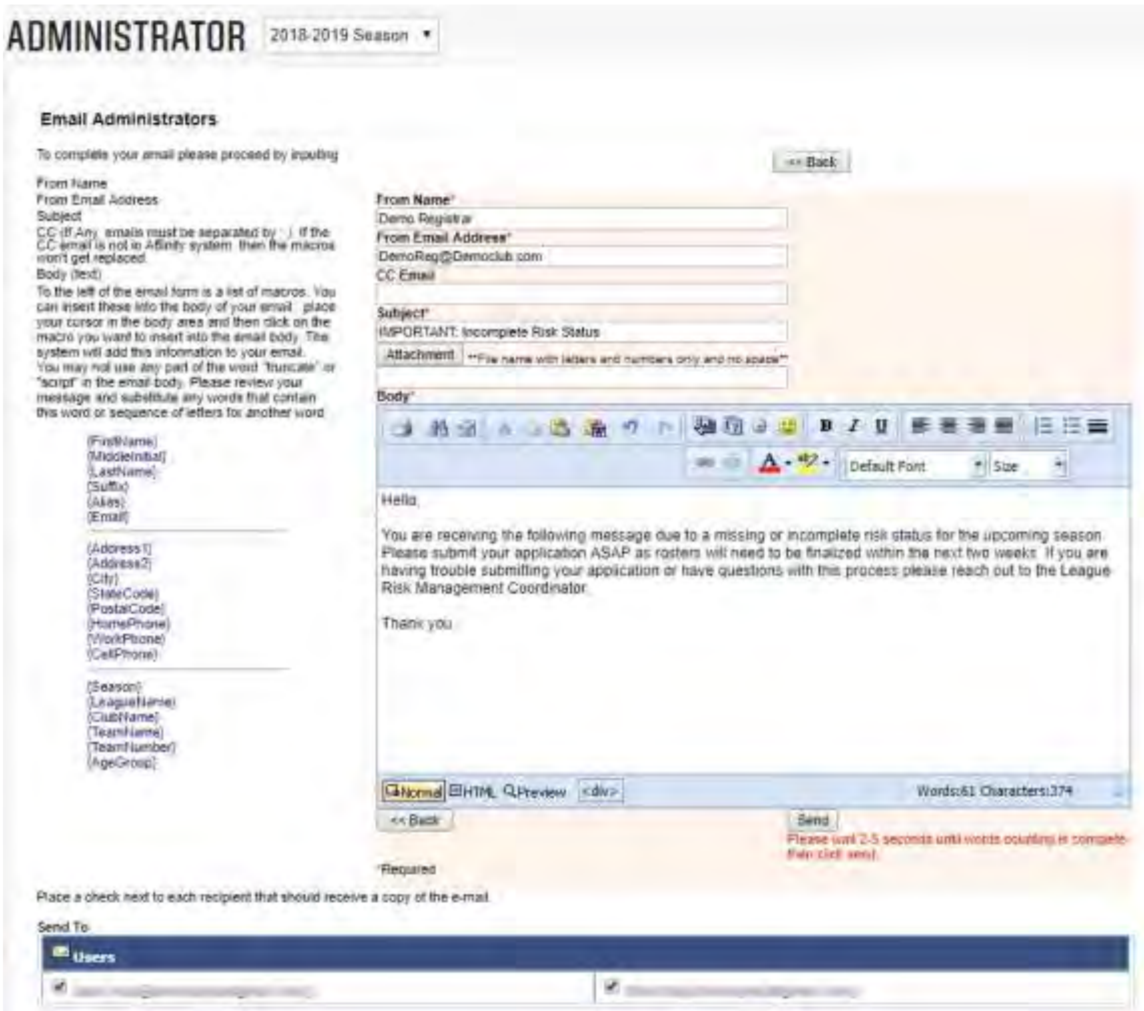
Summary Page Email Feature

The summary pages also allow you to send an email to player's parents or admins listed on the page.

To send an email, check the boxes of those individuals you would like to email, then choose email selected members.



You will then be taken to an email editor where you will compose your custom message. This may include a reminder to complete the missing requirement or send them the next steps for the season.



When finished composing your message, choose Send.

A summary of Users receiving the email will display directly below the content editor.

Bulletin Board Widget

The Bulletin Board Widget is managed by the State office and includes updates and news from the State office or from Affinity Sports.

Search Widget

To locate and view the dashboard of a club or club detail, type the name of the club or club detail in the search field and choose Search. To view all Club and Club Detail Dashboards, choose Search.

Once the list of Clubs and Club Detail displays, click on the name of the Club or Club Detail to view that organization's dashboard.

To return to the main Association Dashboard, choose Association from the Level Navigation in the upper right of your browser window.

To return to the Club Level after visiting a Club Detail Dashboard, choose Club from the Level Navigation in the upper right of your browser window.

This widget is available at the State, District and Club level.

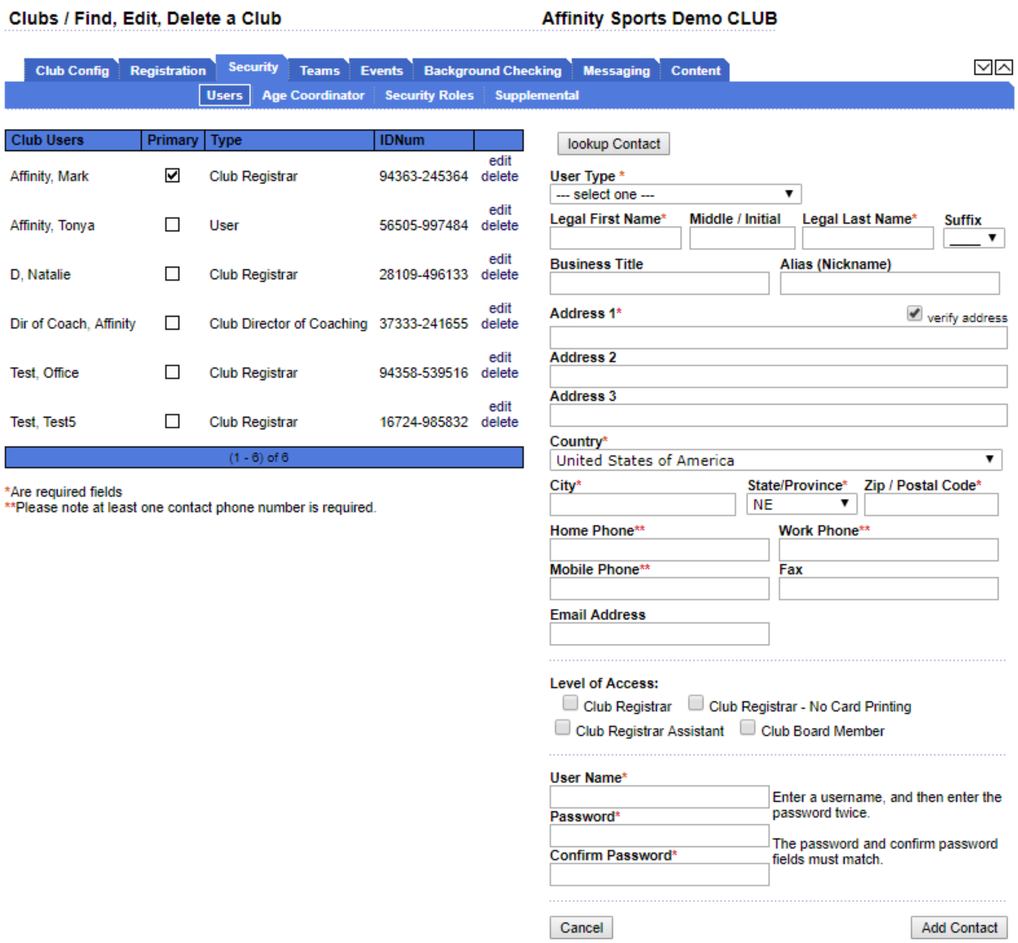
User Profiles and Roles

To access the Affinity Sports Platform, users will require a user profile to be created and a user name and password be assigned. Each user in our system is assigned to a specific pre-defined security role. System access and visibility are based on your role in the organization.

Club and Club Detail Level Security Roles include:

- Club Registrar = Full Access to your club
- Club Registrar – no card printing = Full access, no card printing
- Club Registrar Assistant = High Access, no card printing
- Club Board Member = Low Access, view only

NOTE: Access for Team Managers is given in a different area of the Affinity Sports Platform and is given when a Team Manager is assigned to a Team.



Creating a User Profile

1. To create a user profile for a Club Registrar or club staff member, from the main navigation at the Club level, choose Setup and then Config.
2. Choose the Security tab.
3. The Users screen displays.
4. To add a new user, you will first want to look up the user in the platform.
5. To look up a user, choose Lookup Contact from the top of the form to open a pop-up search window.
6. Enter the user's last name and first name in the pop-up search window.
7. If the user exists in the platform, the user profile will display. If this is the correct user, choose Select beside their name and their information will be pre-populated in the form.
8. If no results are found, choose Close to exit out of the pop-up search window.
9. Enter the users information in the form including:
    - User Type – This field is used for pulling reports. This does not determine user access.
    - First and Last Name
    - Business Title (if applicable)
    - Address, Country, City, State, and Zip Code

- At least one phone number
- Valid email address
- Choose a Level of Access – ***This will assign a user's level of permission and system access.***
- Create a user name and password and share it with the user
- Choose Add Contact

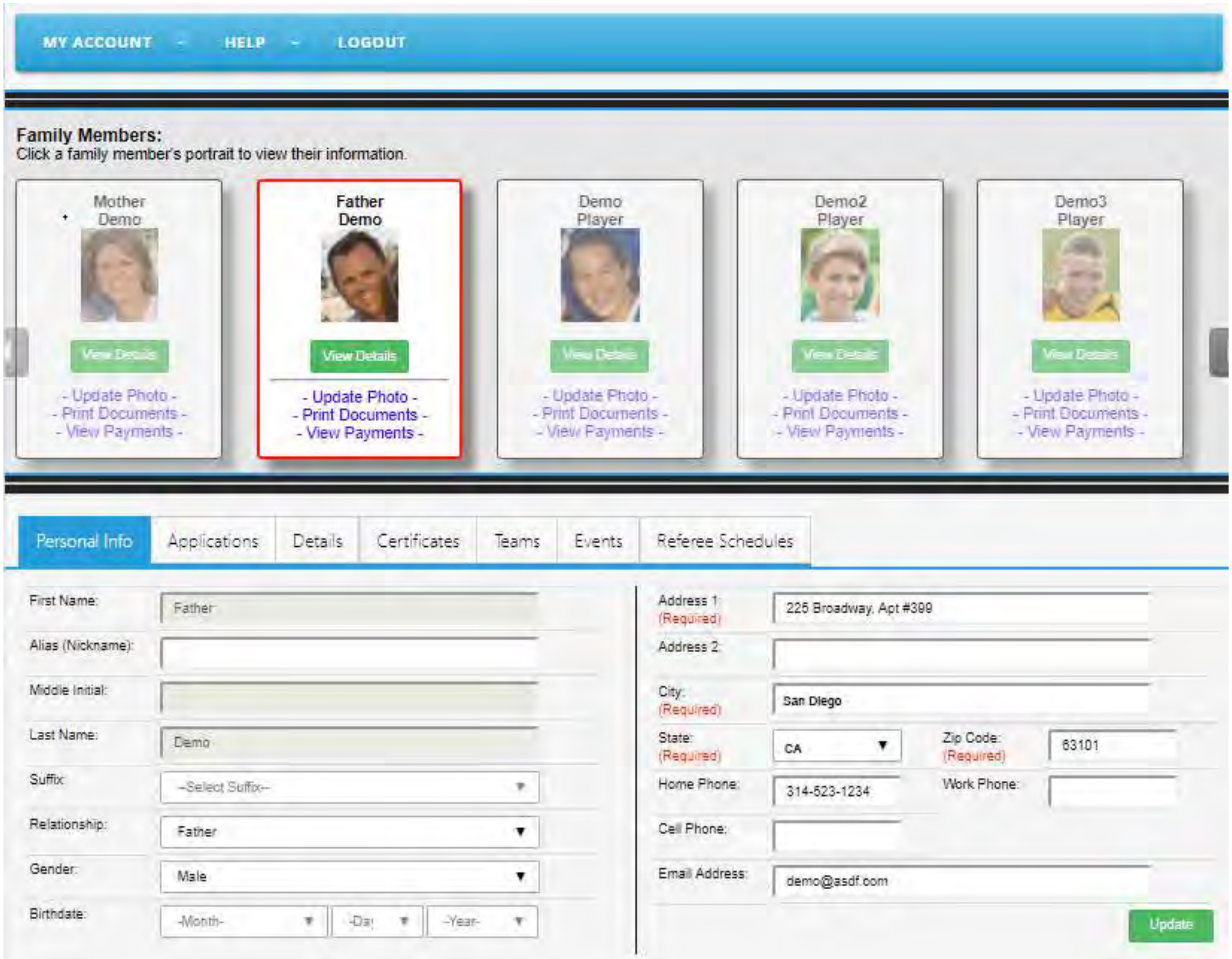
TIP: Passwords must be either 7 or 8 characters in length. Passwords must contain one or more UPPER case, one or more lower case and one or more digits (0-9)

NOTES: To avoid creating duplicate records in the system, you should always search for a user before creating a new user profile for them.

Our system allows security access at each level. If you only want the user to see Club/Club Detail user access should be set at the Club/Club Detail level.

My Account

My Account located in the top toolbar is used to access your personal information. You can update your contact information, username and password from My Account. There is also a Message Center where you will be able to view all emails sent through the Affinity Sports Platform to you. Emails will also go to your email address included in your user profile.



To return to the Dashboard from My Account, choose Leagues and Teams from the top set of tabs and then click dashboard on the next screen from the main navigation.

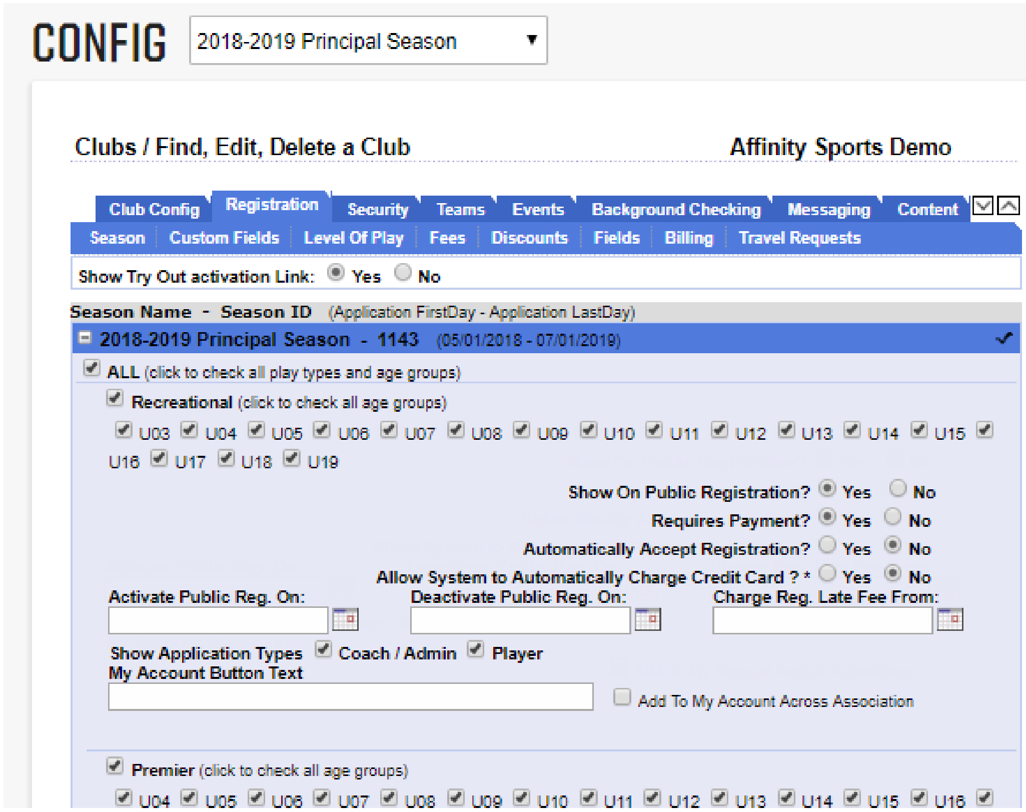
Season Configuration

Once the Association has opened the Season, the season needs to be configured at the Club and Club Detail level by the Registrar.

This must be done at both the Club and Club Detail Level.

Configure Season at the Club Level

1. To configure the season from the Club Level, choose Setup and then Config from the main navigation.
2. Choose the Registration tab to display the season screen, which lists all the active seasons created by the Association.

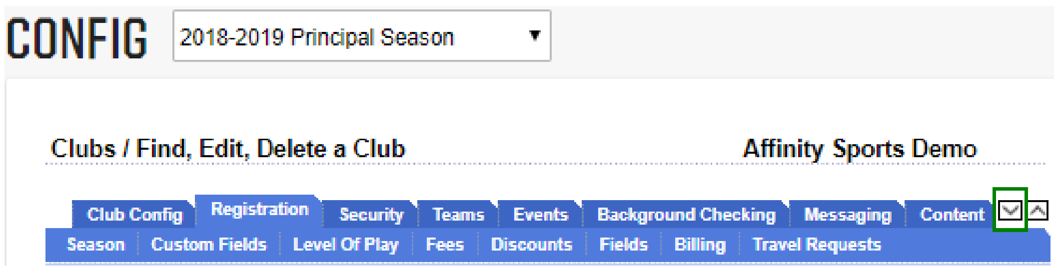


3. Choose the + plus sign next to the season you wish to configure and to open the season configuration options.
4. Check the Play Level and Ages that you allow to register for a specific play type.
5. Choose Yes for “Show on Public Registration”
6. Choose Yes for “Requires Payment”
7. Choose No for “Automatically Accept Registration”
8. Choose No for “Allow System to Automatically Charge Credit Card”
9. Leave “Activate Pub Reg. On” blank
10. Leave “Deactivate Pub Reg. On” blank
11. Leave “Charge Reg. Late Fee From” blank
12. Check both “Coach/Admin and Player Application Types”
13. Leave “My Account Button Text” blank
14. Do not check “Add to My Account Across Association”
15. Click Update – when you have completed the above steps for all play types and age groups.

NOTE: The age groups in the season grid are player seasonal ages not Team Age Groups. You will need to check any age accepted by your club. Example: U8 is a 7 year old; however, your club may only have U9 and up Teams but you allow 7 year olds to be rostered to a U9 team.

Configure Season at the Club Detail Level

1. From the Club Level, choose Setup and then Config from the main navigation.
2. Choose the Registration tab to display the season screen, which lists all the active seasons created by the Association.
3. Click the down arrow displayed in the upper right corner of the tabs window to navigate to the corresponding club.



4. The screen title will change to "Clubs/Find, Edit, Delete a Club Detail" and the Club Detail name will display.
5. Choose the + plus sign next to the season you wish you configure at the Club Detail level.

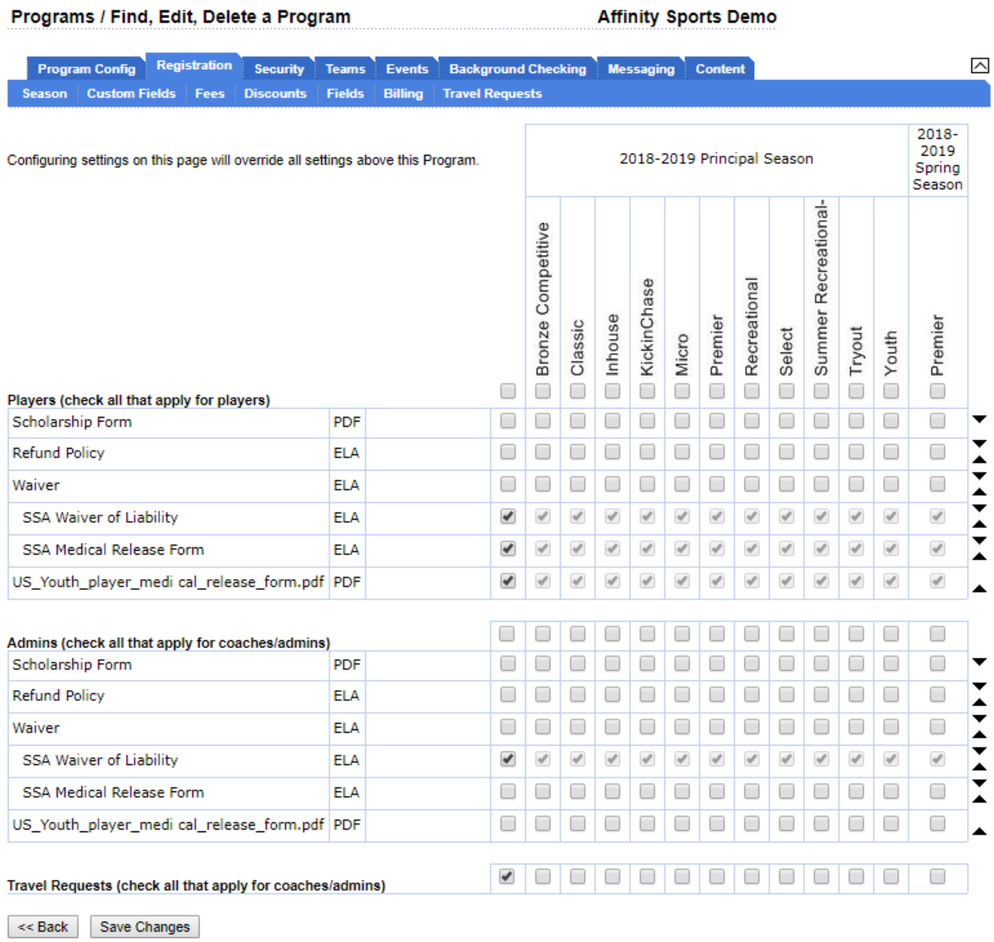
6. Choose Yes/ No for “Show on Public Registration” if configuring season for Online Registration
7. Choose Yes/ No for “Requires Payment”
8. Choose Yes/No for “Automatically Accept Registration”
9. Choose Yes/ No for “Allow System to Automatically Charge Credit Card”
10. Enter a date for “Activate Public Reg. On” *(optional)*
11. Enter a date for “Deactivate Public Reg. On” *(optional)*
12. Enter a date for “Charge Reg. Late Fee From” *(optional)*
13. Check both “Coach/Admin and Player Application Types”
14. Leave “My Account Button Text” blank
15. Do not check “Add to My Account Across Association”
16. Click Update – when you have completed the above steps for all play types and age groups.

NOTE: If configuring a new season, you must log out and log back in for the season to show in your Season dropdown.

Assigning ELAs and Documents

If your club needs parents/ legal guardians to consent to any Legal Agreements/Waivers during the online registration process, follow the steps below to assign the waiver to the proper seasons or play levels.

1. On the Registration tab select Assign PDF/ ELA.
2. Check off any Legal Agreements/Waivers for the membership to sign or print.



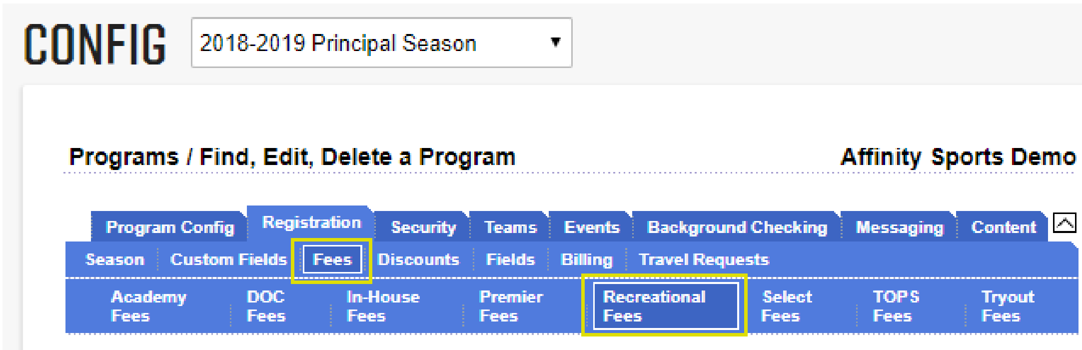
3. Click Save Changes when finished.

NOTE: ELAs and documents are configured in the Content tab. To display, you must assign them to the desired season and play type.

Fees

If your club collects registration fees during the online registration process, follow the steps below to assign the fees to their respective play levels and age groups.

1. Choose the Fees sub tab and select the desired play level.



2. To create a fee, choose the fee type from the dropdown menu or create a custom fee by choosing Other from the dropdown menu and then name the fee in the Fee Type Description field.
3. Enter the fees for each age group.
4. Choose if the fee is mandatory (M) on the registration process, Optional (OS) pre-selected on the registration process, Optional (ON) not selected on the registration process.
5. Choose Create to create your fees.
6. You may edit your fee by choosing the name of the fee from the Edit Fee Type dropdown menu located at the top of the Fee screen.
7. If all play types and age groups are charged the same you may check the All play types and all age groups are set equally to enter the fee for all play types and age groups.

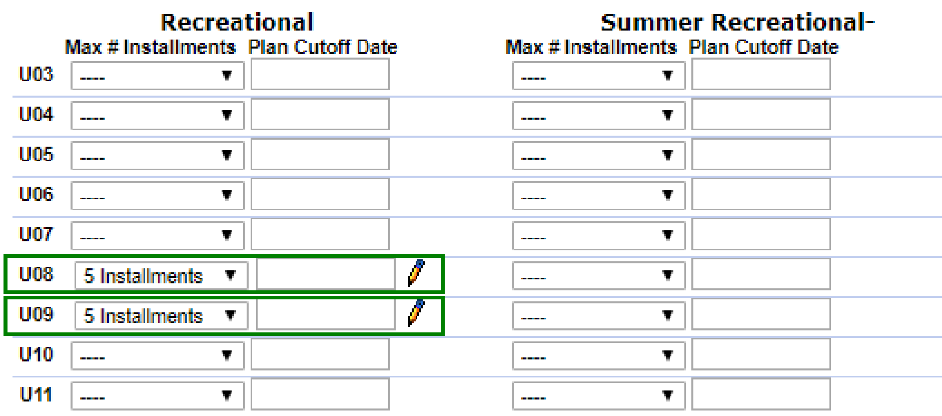
Creating Payment Plans for Fees

Once a fee is created the option to configure payment plans for the respective fee will become available. Payment Plans can be customized per play level and age group. Fees without payment plans will be due in full at time of registration.

NOTES: Registrations submitted after a Payment Plan Cutoff Date will be due in full unless manually edited by Club Admins. The payment plan function only supports mandatory fees. Please do not create payment plans on optional fees.

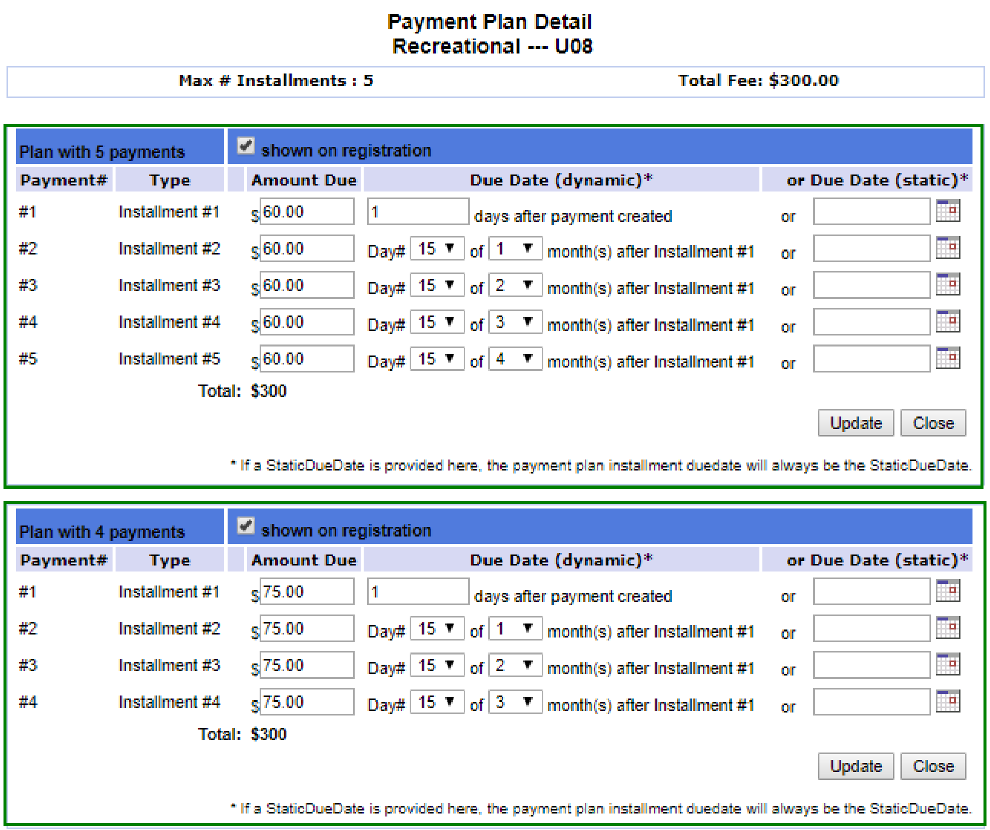
1. To configure a payment plan, select the play level and the fee type under the Fees tab.
2. Click Payment Plan >>
3. Using the dropdown menu, select the max # of installments.

4. Enter in a plan cutoff date. *(optional)*
5. Click Update payment plan. Pencil icons will display across from the age groups that have been updated.
6. Click on the pencil icon to further edit the payment plan for the age group.



	Recreational		Summer Recreational-	
	Max # Installments	Plan Cutoff Date	Max # Installments	Plan Cutoff Date
U03	----		----	
U04	----		----	
U05	----		----	
U06	----		----	
U07	----		----	
U08	5 Installments		----	
U09	5 Installments		----	
U10	----		----	
U11	----		----	

7. The payment plan detail window will generate with the various options to edit the details of the payment plan. Editable details for each installment option will display.



Payment Plan Detail
Recreational --- U08

Max # Installments : 5 Total Fee: $300.00

Plan with 5 payments — shown on registration

Payment#	Type	Amount Due	Due Date (dynamic)*		or Due Date (static)*
#1	Installment #1	$ 60.00	1 days after payment created	or	
#2	Installment #2	$ 60.00	Day# 15 of 1 month(s) after Installment #1	or	
#3	Installment #3	$ 60.00	Day# 15 of 2 month(s) after Installment #1	or	
#4	Installment #4	$ 60.00	Day# 15 of 3 month(s) after Installment #1	or	
#5	Installment #5	$ 60.00	Day# 15 of 4 month(s) after Installment #1	or	
	Total:	$300			

Update Close

* If a StaticDueDate is provided here, the payment plan installment duedate will always be the StaticDueDate.

Plan with 4 payments — shown on registration

Payment#	Type	Amount Due	Due Date (dynamic)*		or Due Date (static)*
#1	Installment #1	$ 75.00	1 days after payment created	or	
#2	Installment #2	$ 75.00	Day# 15 of 1 month(s) after Installment #1	or	
#3	Installment #3	$ 75.00	Day# 15 of 2 month(s) after Installment #1	or	
#4	Installment #4	$ 75.00	Day# 15 of 3 month(s) after Installment #1	or	
	Total:	$300			

Update Close

* If a StaticDueDate is provided here, the payment plan installment duedate will always be the StaticDueDate.

- **Shown on Registration:** If this box is checked, plans with those number of respective installments will be shown as an option for a registrant to select.

- **Amount Due:** The amount due in each individual installment plan will be listed. The amount collected in each installment can be edited if necessary. The total for the installments will be displayed below the amount due boxes. The sum of the installment should equal the amount of your total fee amount.

NOTE: If the amount due is larger than the total fee amount this difference will show up on the registrant's order as a "Payment Plan Processing Fee". To avoid this overage, please be sure the two values match.

- **Due Date (dynamic):** Installment #1 will be captured (1) day(s) after the payment has been created. Then each installment will then capture on the 15th of each proceeding month until the last installment is complete. *For example, a registration is completed on 8/30/2018. For this registration, Installment #1 would be captured on 8/31/18. Installment #2 would be captured on 9/15/18, Installment #3 would be captured on 10/15/18, etc.*
- **Due Date (static):** If you wish, the installments can be captured on custom dates that can be configured under this option. If a static due date is provided, this due date will override any dates in the dynamic due date column. *For example, you can choose to capture the installments on the 17th of each month. So you can enter in the date of 8/17/18 for installment #1, 9/17/18 for installment #2, 10/17/18 for installment #3, etc.*

8. Click Update to save any changes.

Club/Club Detail Management

Creating & Managing Teams

The Affinity Sports Platform offers multiple ways to create teams.

Create Individual Teams

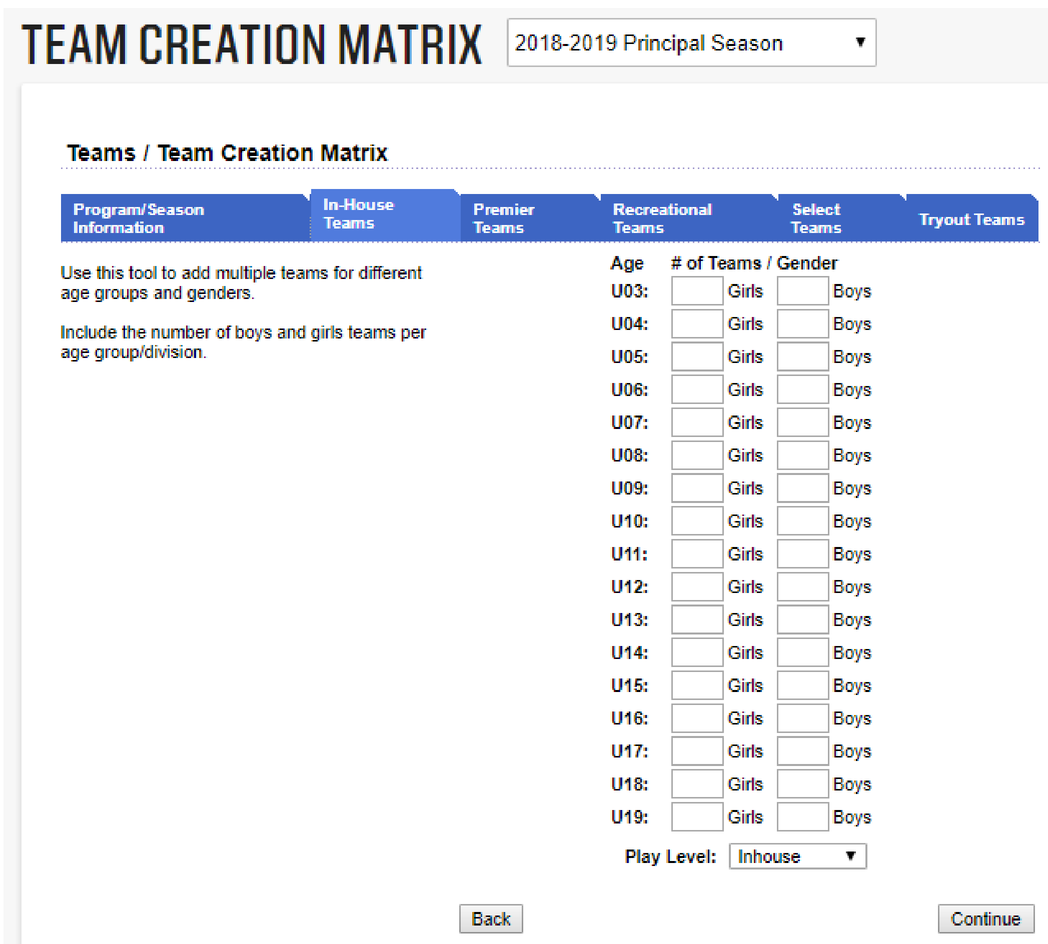
1. To create Teams individually, choose Teams and Create from the main navigation.
2. The District and Club will be selected.
3. Choose your Club Detail from the dropdown menu.
4. Select Team Level, Gender and Age.
5. Enter a Team Name.
6. The system will automatically create a Team Number – the last four digits of this number are editable.
7. Enter Home and Away Uniform colors.
8. Enter the Team Sponsor (if applicable).
9. Choose Add Team.

NOTE: Once a team has been created you can create duplicate teams for the same age group.

Creating Multiple Teams

The Affinity Sports Platform allows users to create several teams for different age groups at one time.

1. To create multiple Teams, choose Teams and Team Creation Matrix from the main navigation.
2. The District and Club will be selected.
3. Choose your Club Detail from the dropdown menu.
4. The Team Creation Matrix displays and the system will default to the first available play level.



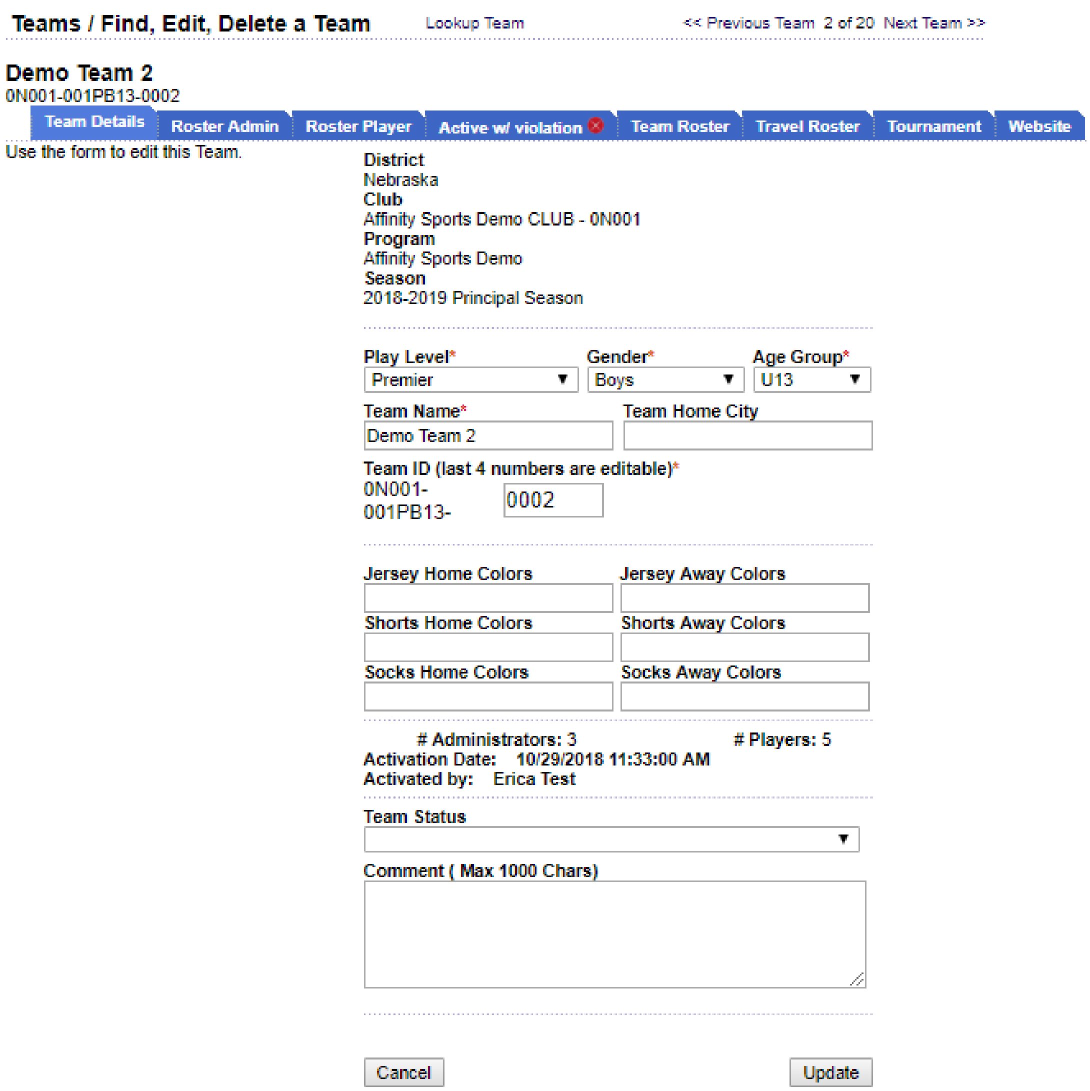
5. Enter the number of teams to be created per age group and gender.
6. Choose Continue to progress to the next play level.
7. Choose Finish when you have entered your information and you will be taken to a list of the teams you created.

Team Look-up

1. Choose Teams and Team Lookup from the main navigation.
2. Select a search criteria from the various dropdown menus and choose Search.
3. From the Search Results, click on the Team Name to view the Team.

How to Edit a Team

1. Choose Teams and Team Lookup from the main navigation.
2. Select a search criteria from the dropdown menus and choose Search.
3. From the Search Results, click on the Team Name to view the Team.
4. Choose Team Details tab to edit the team name, gender, play level, and age group.
5. Choose Update after making changes to save.



6. If you need to edit additional teams, you may click Next Team from the upper right corner of the tab window to move to the next team.

Managing Players, Coaches and Admins

Manually entering players and admins

As a Club Registrar you can manually add players, families and admins to the platform.

1. Choose Players/Admin and Add Player/Admin from the main navigation.
2. Before adding a new player or admin, you will want to verify if this player or admin is already in the system.
3. Enter the player/admin first name, last name, and Date of Birth.

4. If the user exists, the user profile will display. If the correct user, choose Select beside their name and choose the action you wish to perform (Create Player Application or Create New Coach/Admin Application).
5. If no results are found, choose the action you wish to perform (Create New Youth Player, Create New Coach/Admin).
6. Enter the user's information in the form, and for players include information for at least one parent or guardian.
7. Choose Continue.
8. Select a District, Club, Club Detail and Play Level from the dropdowns.
9. Indicate if a payment was received, if the player is accepted and if the player is age legal.
10. If applicable, choose the team in which you wish to roster the player and choose Continue.
11. Enter the required Player/Admin information and choose Save.
12. Agree to the ELA by choosing Agree.
13. If you have additional family members to add, choose Add Other Family Member and follow the same process.
14. To view the player's profile choose Detail.
15. Choose Add Player/Admin to add additional players or admins.

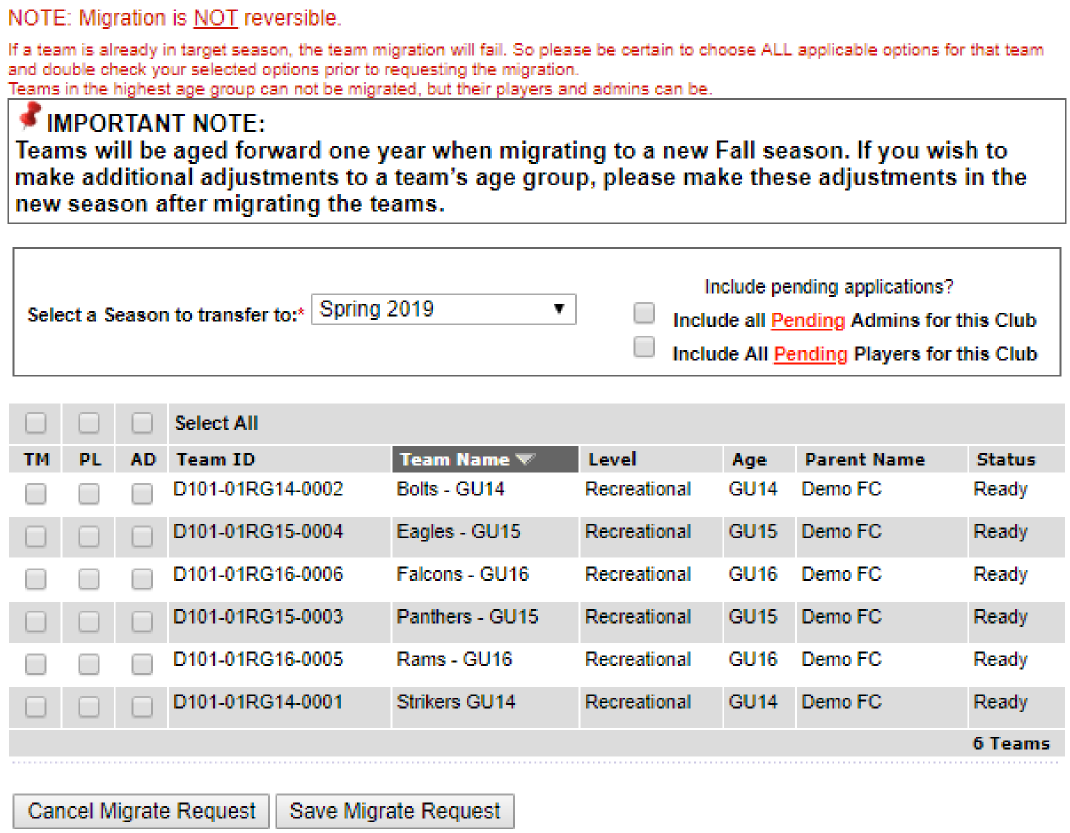
Migrating Players, Admins, and Teams

Registrars can push players, admins, and teams forward into new seasons.

1. To start the migration of teams, be sure you are in the season in which the teams are currently created.
2. From the main navigation hover over Setup and select Setup.
3. Click Teams.
4. Select a search criteria from the various dropdown menus and choose Search.
5. Check the boxes across from the teams you wish to migrate.
6. Click Migrate Selected Teams.

NOTE: Teams will be aged forward one year when migrating to a new Fall season. If you wish to make additional adjustments to a team's age group, please make these adjustments in the new season after migrating the teams.

7. Select the target season to transfer data to within the dropdown menu.
8. Choose applicable options you wish to migrate for each team.
    - TM (Team): Name, age group, and play level of team into selected season.
    - PL (Players): Move players rostered onto the team into selected season.
    - AD (Administrations): Move admins rostered onto the team into selected season.



9. Once complete, click Save Migration Request.

NOTE: Migration is NOT reversible.

10. To see the migrated data, change your seasonal dropdown to the target season and go to the appropriate Lookup screen. If a larger amount of data was pushed into the target season, it could take several moments for the system to push the information.

NOTE: Teams in the highest age group cannot be migrated, but their players and admins can be. Take this into consideration for teams in the Maroon U10 or Gold U10 category as they will not be eligible for migration since they are in the highest age group for their respective play level. Players and admins on those teams can be migrated, but not the team shells.

Adding Player or Admin Photos

1. Choose Players/Admin and Player Lookup or Admin Lookup from the main navigation.
2. Select the filters you would like to use and choose Search.
3. A list of players or admins based on your criteria displays.
4. Click on the player or admin name to display their profile.
5. Navigate to the Player Information tab or the Administrator Information tab and click on the Upload Photo icon.

6. Click Choose File to locate the photo on your computer.
7. The image will display and you will have the option to crop, resize or rotate the image.
8. Choose Upload Image to add the photo to the player or admin profile.

TIP: Photos should be headshots that are clear, centered and a front view of the player's face with eyes open. Please no sunglasses or hats that hide the player's face.

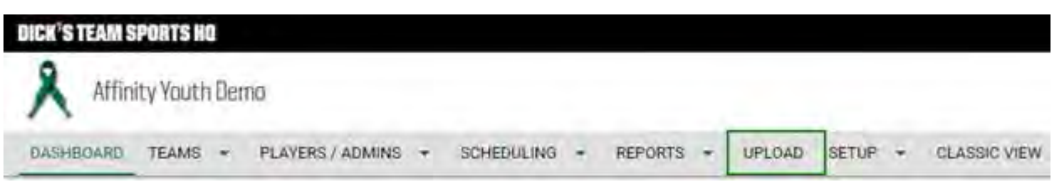
Adding Player Birth Certificates

1. Choose Players/Admin and Player Lookup from the main navigation.
2. Select the filters you would like to use and choose Search.
3. A list of players based on your criteria displays.
4. Click on the player name to display their profile.
5. Navigate to the Player Information tab and click on the Upload Birth Certificate icon.
6. Click Choose File to locate the Birth Certificate on your computer.
7. The image will display and you will have the option to crop, resize or rotate the image.
8. Choose Upload Image to add the Birth Certificate to the player profile.

Uploading Players and Admins

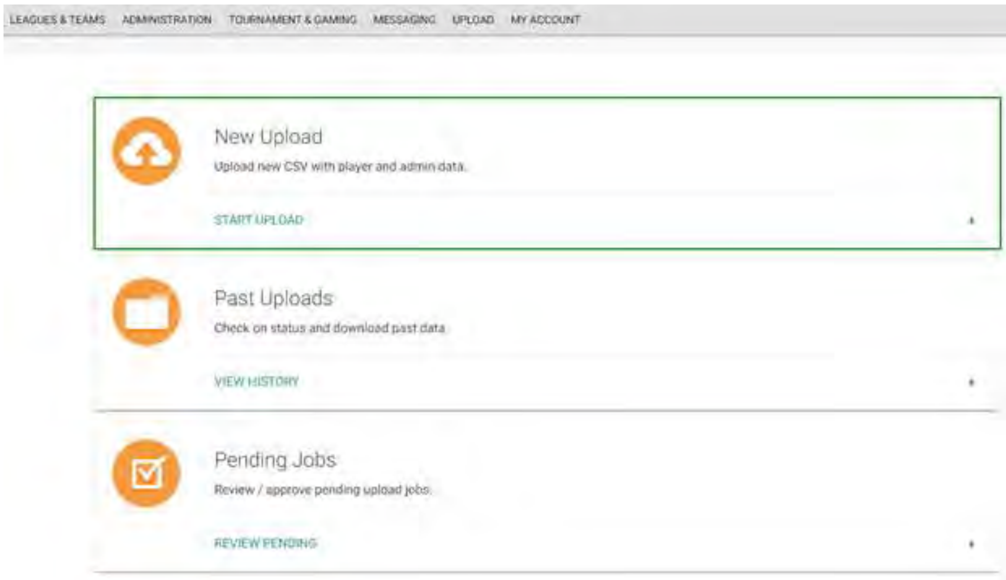
For Clubs using a provider other than Blue Sombrero for online registration, they will need to manually add players or admins to the Affinity Sports Platform or they may submit their data using the Affinity Upload Portal. Please visit the Minnesota Youth Soccer - Affinity Sports Help Center to download the upload template and for a guide on how to properly fill in the excel file. Once all information on the template is completely filled in, please follow the steps below to submit your data via the Affinity Upload Portal.

1. To access the Upload Module, choose Upload from the top navigation in the Affinity System.

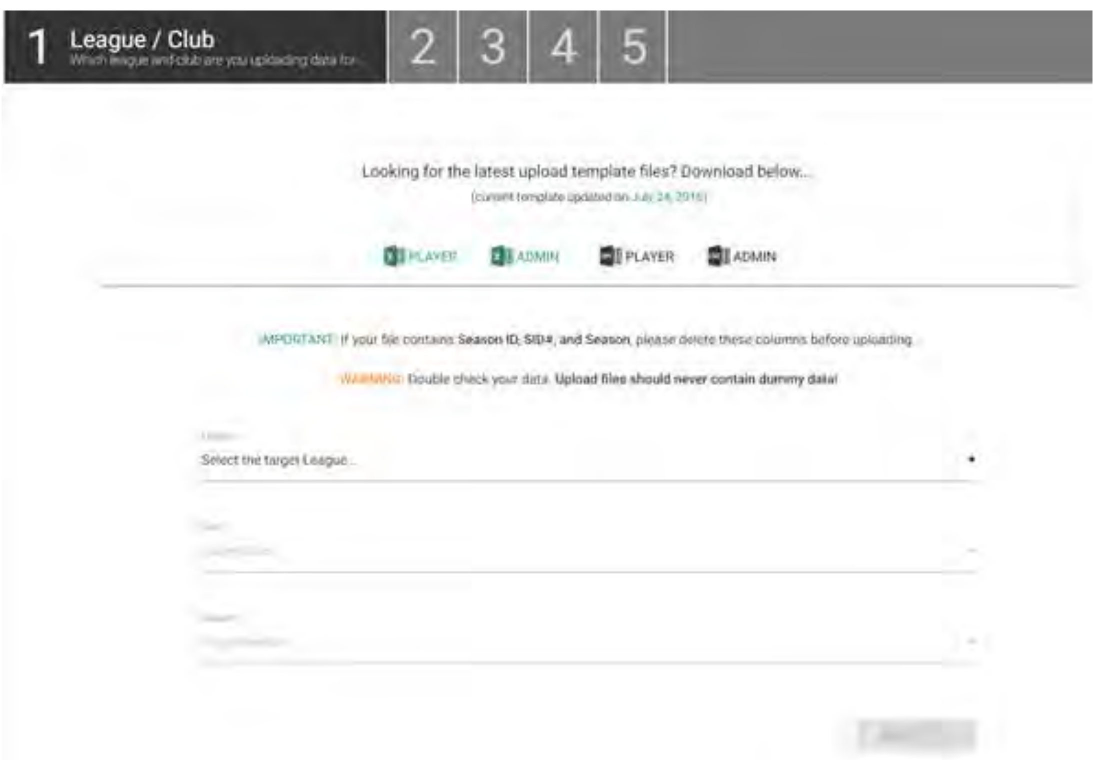


NOTE: Access to the Upload Module and feature is determined by your system access level. The State will determine access privileges.

2. Once you select Upload, you will be taken to the Upload Module home page. Please be patient. Your level of access will determine how quickly the Module loads. Greater access may take longer to load.
3. To create a new upload choose Start Upload.

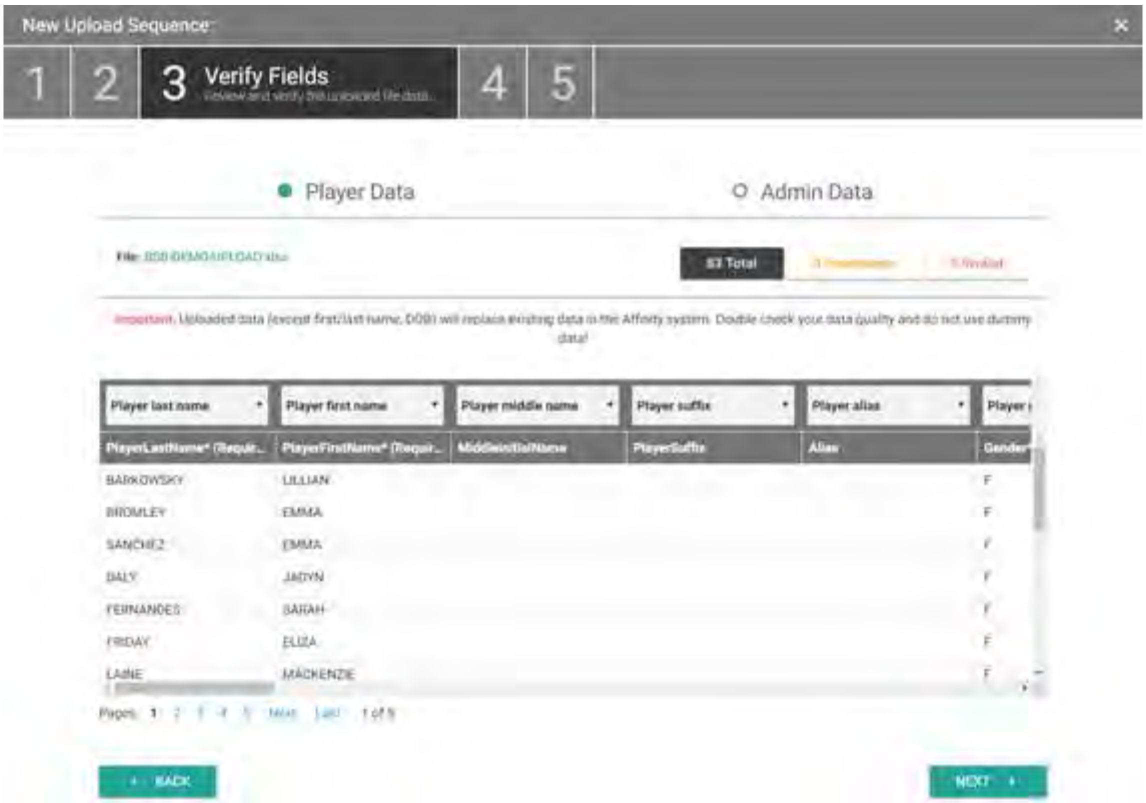


4. Choose your League, Club and Season from the pull-down menus. Be sure the options selected match what is entered in your Excel Template.



NOTE: You can also download the latest upload templates on this page.

5. Once you have selected your League, Club and Season, you will be taken to Step 2. Choose "I will upload a spreadsheet file with my data." Then choose FILE to browse your computer for the file you wish to upload and then choose NEXT.
6. The next screen, Step 3 will allow you to verify your data before completing the upload. Choose the Data File Type by choosing Player Data by selecting the radio button.



NOTE: Not all users will have the option to choose Admin Data and Player Data. This setting will be determined at the State Level.

Verify that the data is entered correctly and accepted.

- Total indicates how many records you are uploading.
- Incomplete indicates how many records need to be completed.
- Invalid indicates any data rows that need to be fixed before uploading.

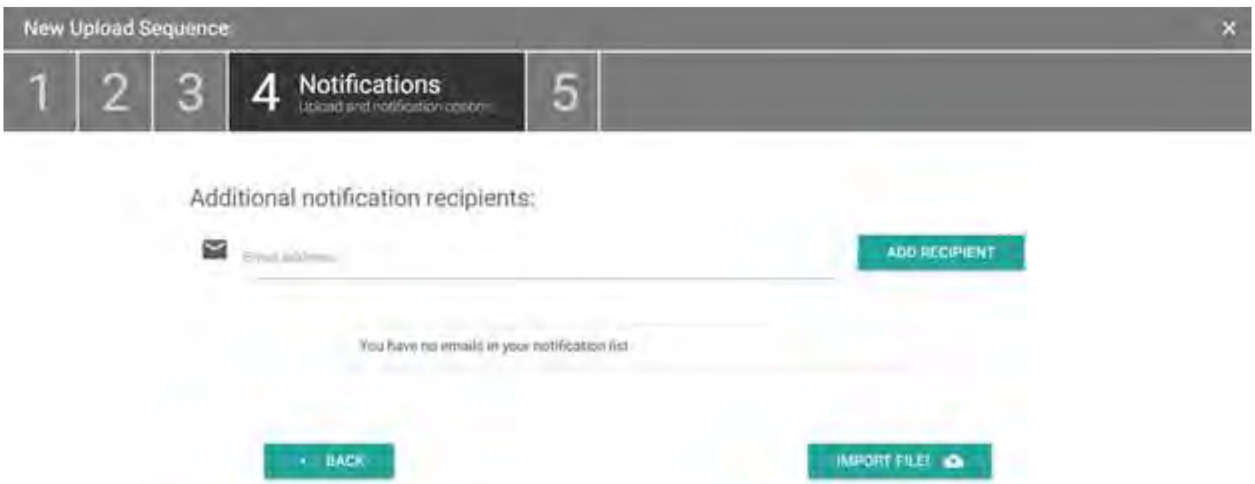
7. You will also want to verify that the data you are uploading is mapping to the correct fields. If your data is not mapping correctly, you have the option to use the pull-down menu to re-map the data to the correct field by choosing the downward pointing arrow and selecting the correct field.

You also have the option to ignore a field with errors, however, if you choose to ignore a field, no data from that field will be uploaded.

We recommend fixing the excel spreadsheet when errors occur.

8. Once you have verified your data, choose NEXT.

9. You will be taken to Step 4. In this step you can notify someone that you have uploaded the file.



Choose ADD RECIPIENT, and enter the person's email address. To add multiples (up to 5) choose ADD RECIPIENT. When done adding notification recipients, choose IMPORT FILE to upload your data.

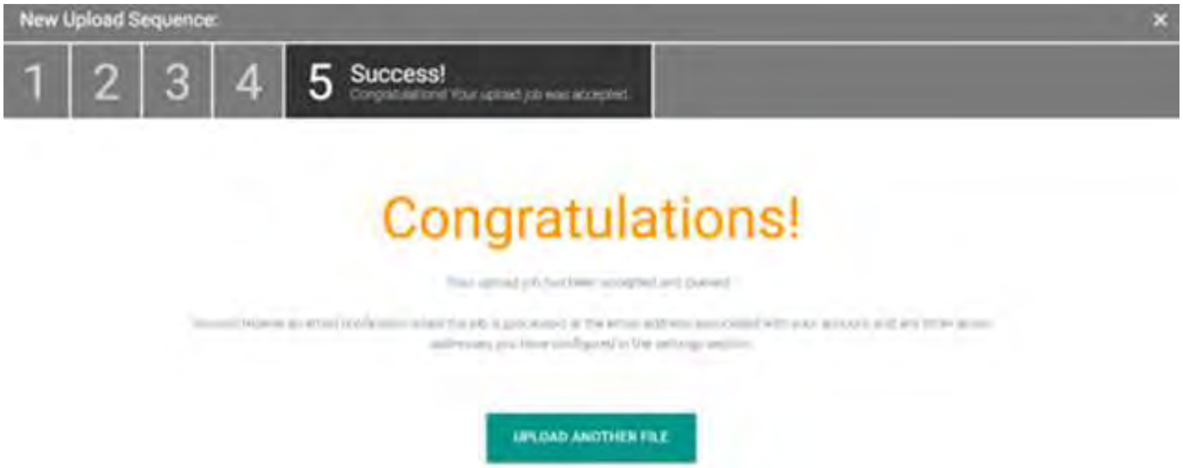
As the person uploading data, you will receive an email notification when the data is in queue and when it finishes uploading. This email will also include exceptions of data that was not loaded as part of your data file.

NOTE: Some States require data to be submitted to a queue and reviewed and approved by the State office before uploading to the system.

Please contact the state office regarding queue procedures and/or timelines for approvals.

NOTE: Files with multiple records may take longer to upload. Please be patient and allow the data to upload.

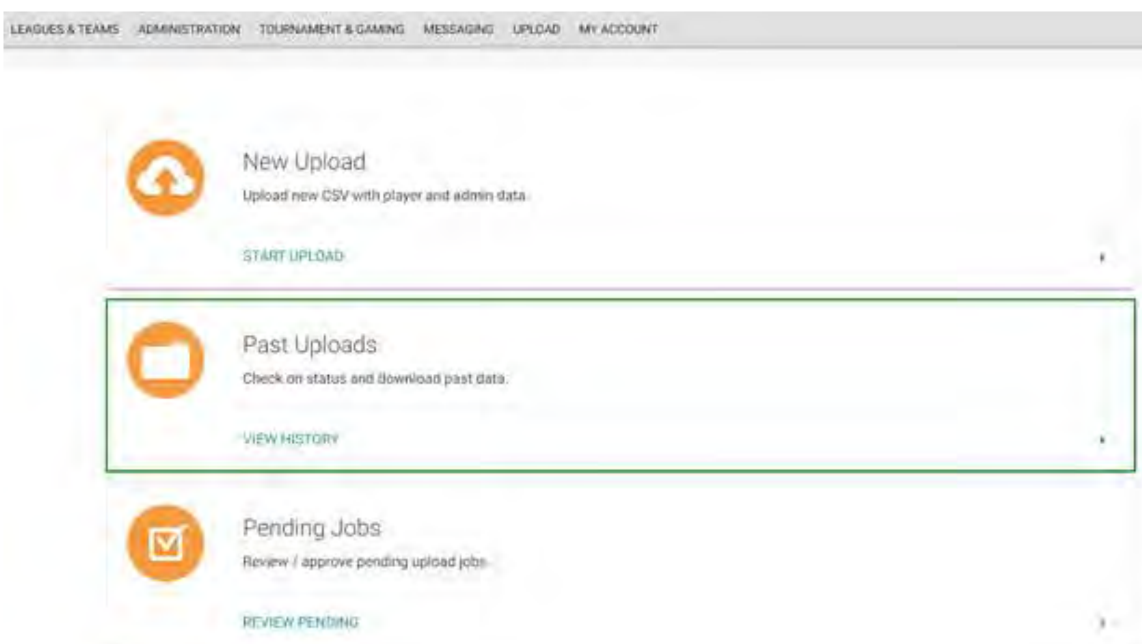
10. When your File has been successfully placed in queue, you will be taken to Step 5 and have the option to upload another file. To upload another file, choose UPLOAD ANOTHER FILE.



As the person uploading data, you will receive an email notification when the data is in queue and when it finishes uploading.

Viewing Upload History

Within the Affinity Upload Portal you may also view a history of files previously uploaded.

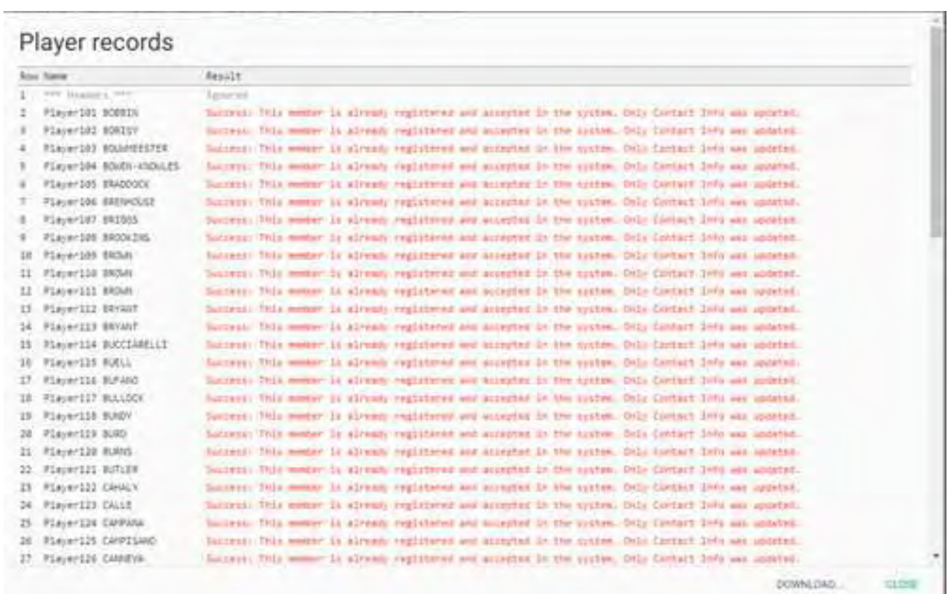


1. Once the Upload Module page loads, choose VIEW HISTORY.

NOTE: Not all users will see the Pending Jobs option. This is limited to the State office or designated data approvers.

2. Choose the League and Club you wish to view the history for by using the drop-down menus.
3. Your History will load and you will be able to view the uploads completed and the status of those uploads.

4. To view records created by name, choose Report. A pop-up window will open to show the data. You will have the option to view on the screen or download and save as an Excel or .CSV file.



Managing Players

Player Lookup

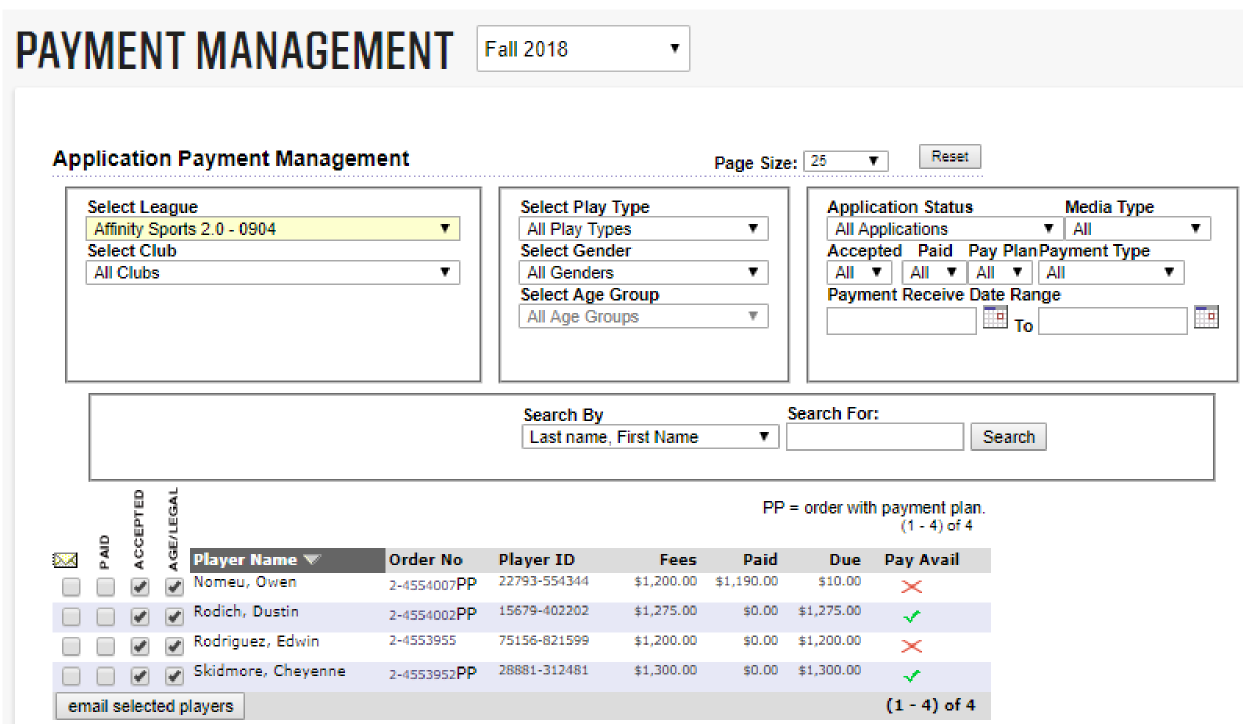
The Affinity Sports Platform provides users with the ability to search for players by club, club detail, play type, gender, age group, application status, or disciplinary action, season, or name. Users have the option to perform a full or limited search depending on the criteria and search parameters selected.

1. Choose Players/Admin and Player Lookup from the main navigation.
2. Select a search criteria from the various dropdown menus and choose Search.
3. From the Search Results, click on the Player Name to view the Player Profile.

Payment Management

If clubs are collecting payments via online registration the Affinity Sports Platform also provides users with the ability to search for players by payment status, payment type, or payment plan within the Payment Management screen. Users have the option to perform a full or limited search depending on the criteria and search parameters selected.

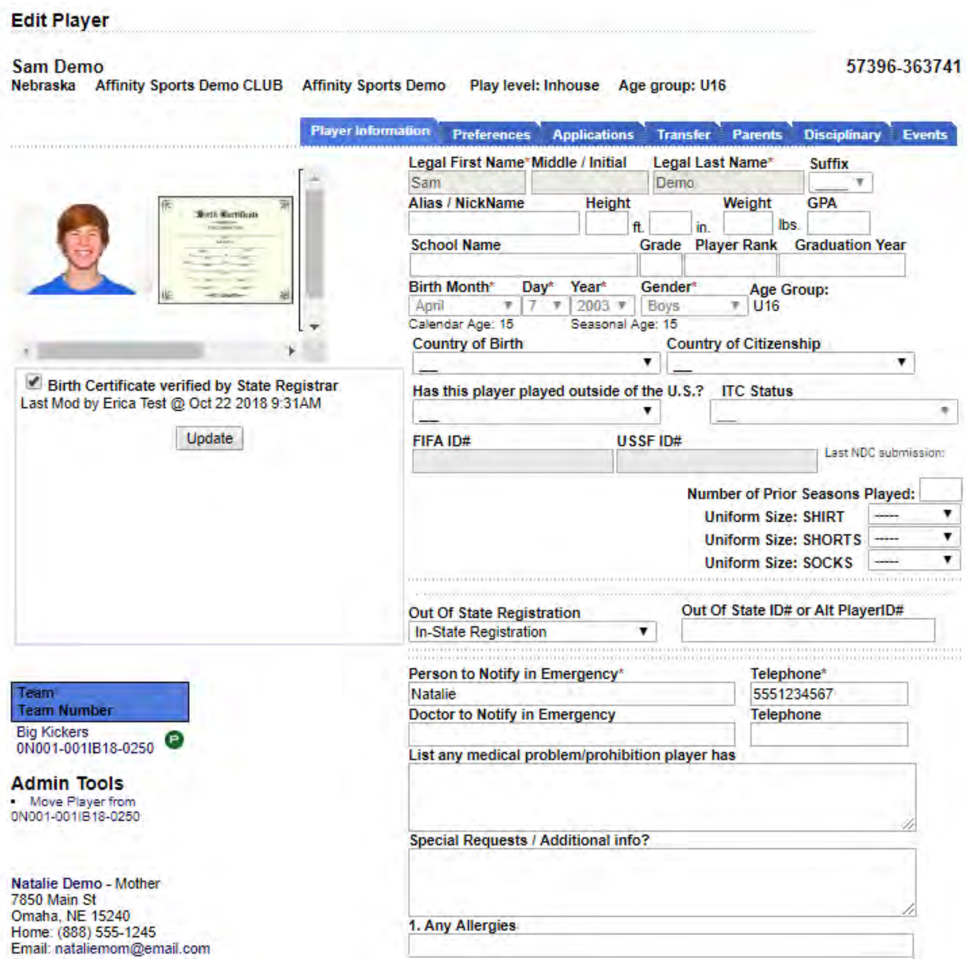
1. Choose Players/Admin and Payment Management from the main navigation.
2. Select a search criteria from the various dropdown menus and choose Search.
3. From the Search Results, click on the Player Name to view the Player Profile.



TIP: Clicking on the order # link across from the player's name will generate a pop-up window displaying the details of the order.

Player Profile

There are multiple tabs under the players profile or record that perform different functions and allow different information to be updated.



- Player Information – Player name, date of birth, gender, medical information, etc.
- Preferences – An optional tab used for entering the player's administrator, volunteer or teammate requests.
- Applications – Shows the details of current and historical applications for the player, provides the ability to edit and/or cancel the application
- Transfer – Shows release/transfer history and provides the ability to perform or initiate a release/transfer. The player must be assigned to an activated team in order to begin the release/transfer process.
- Parents – Lists parents/guardians and provides an edit link to open and edit the parent/guardian information
- Disciplinary – Provides the ability to track disciplinary items on the player

- Events – Displays any events the player has signed up for through the Affinity Sports Event Manager.

Editing Player Information

1. Choose Players/Admin and Player Lookup from the main navigation.
2. Select a search criteria from the various dropdown menus and choose Search.
3. From the Search Results, click on the Player Name to view the Player Profile.
4. Select the tab where you need to add or update information.
5. Choose Update after making changes to save.

Verifying Players

Before rostering a player, the Club Registrar will need to accept the player and verify the admin details align with business rules.

The Club Registrar will complete the final approval and verification.

1. Choose Players/Admin and Player Lookup from the main navigation.
2. Select any filters and choose Search.

NOTE: We recommend using the filter of application status of Pending All Applications to find new player applications that need to be rostered.

3. The list of players matching the criteria will display. If you used the status of Pending Applications. The names will display with four options.
    a. First is an option to email this player's parent
    b. Second shows if this player has paid
    c. Third indicates if the player has been accepted
    d. Fourth (Age Legal) if the Birth Certificate has been verified. To verify a Birth Certificate, click the player's name to see the player details, and view the Birth Certificate on file.
4. The Club Registrar will view the player's profile and confirm that a Birth Certificate has been uploaded and the photo is proper.
5. If yes, the Club Registrar will check Accepted and Age/Legal to accept and verify the player name, gender, date of birth match their birth certificate and a certificate is uploaded, and that the player will be playing with your club from the Player Search Results screen, when Pending All Applications Status is selected.
6. Once your players have been accepted and verified, they can be rostered to a team.

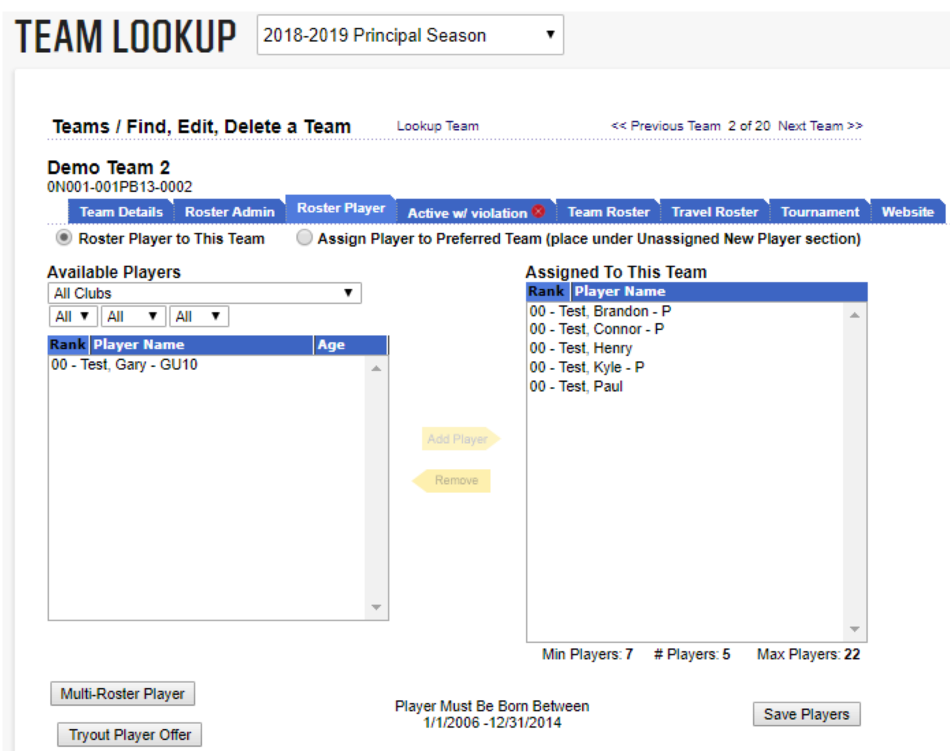
Player Status Terms

- Accepted – confirmation that the player will be playing with your club, triggers player to appear in billing reports. One of two steps necessary in order for player to be rostered to a team.

- Age Legal – confirmation that the vital data (name, gender, date of birth) entered into the system for the player matches the information on their birth certificate. One of two steps necessary in order for player to be rostered to a team.
- Pending – player has an application but is not assigned to a team.
- Assigned - player is rostered and assigned to a team.
- Activated - player is on an activated team.
- Cancelled - player's application has been cancelled.
- Rejected - player's application has been rejected.
- Pending Release or Transfer - player's application is pending approved release or transfer.
- Approved Release or Transfer - player's application has been approved for release or transfer.
- Rejected Release or Transfer - player's applications has been rejected for release or transfer.

Rostering Players

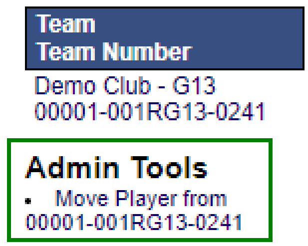
1. Choose Teams and Team Lookup from the main navigation.
2. Select any filters and choose Search.
3. From the Search Results, click on the Team Name to view the Team Details.
4. Choose the team in which you wish to roster a player by clicking on the name of the team to display the team details.
5. Choose Roster Player tab.
6. You will see a list of players available to roster to this team on the left side of the screen.



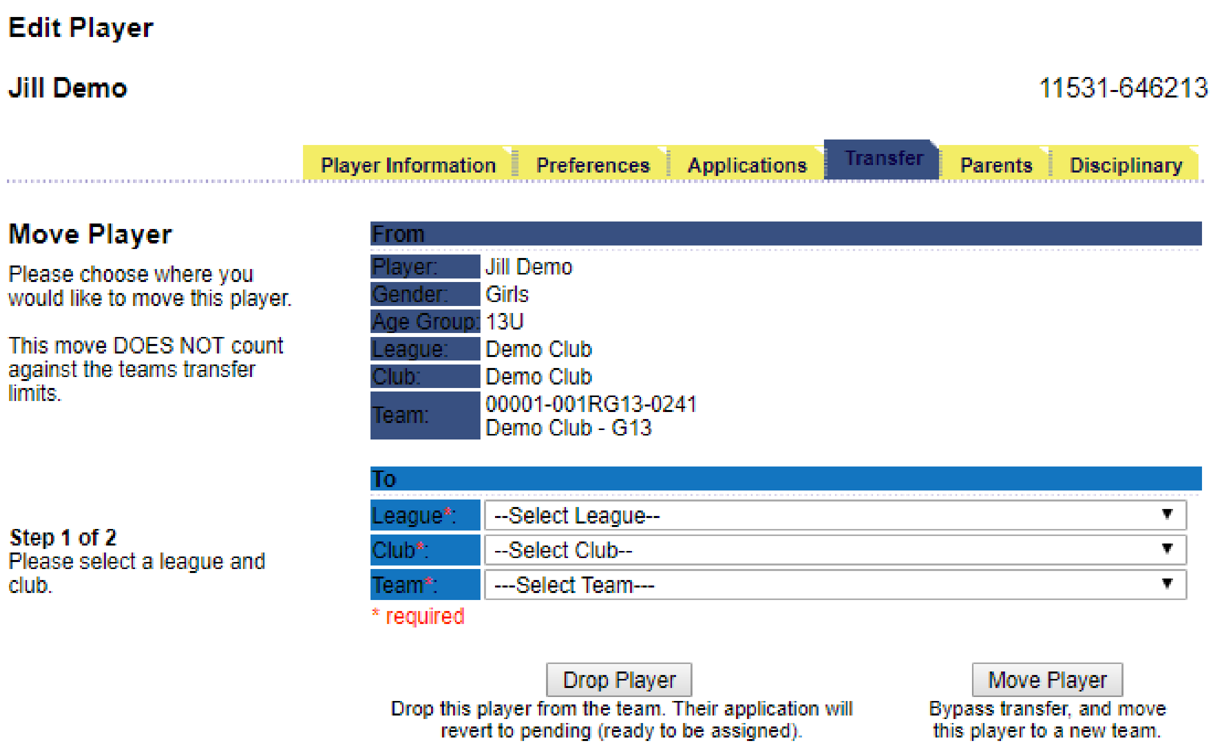
7. Click the name of the player to select and choose Add Player to move the player to the team roster.
8. Choose Save Players to save your work.

Move Player Feature

If you need to move a player from one team to another throughout the season the Move Player option is available on the player's profile. To begin, click on the "Move Player from" hyperlink located on the Player Information tab below the player's photo and team name/ team number.



On the next screen, choose the League, Club and Team you wish to move the player. This move will not count against the teams transfer limits. Once selections have been made, click Move Player.

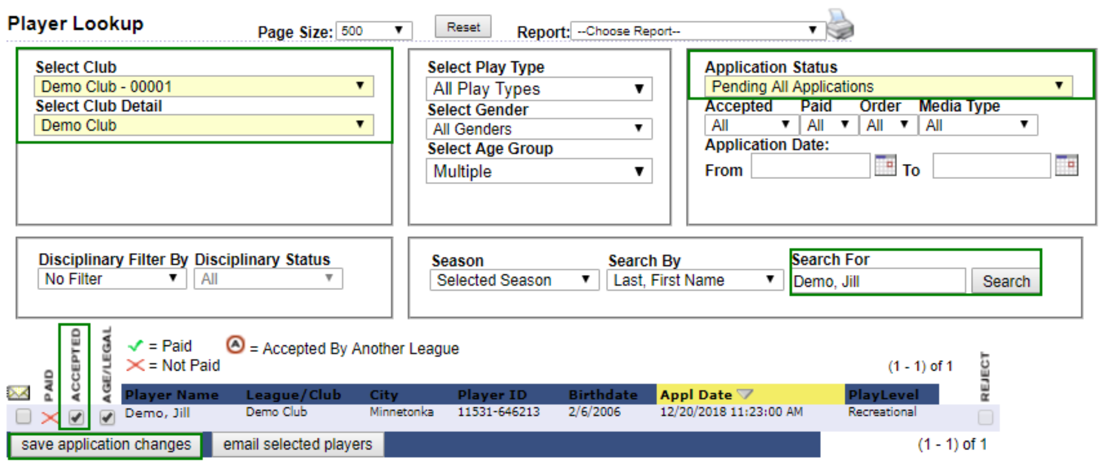


Cancelling Player Applications

In order to cancel a player's application the following criteria must be met:

- Player is not rostered onto a activated team
- Player is not rostered onto a team
- Player must be marked as unaccepted

To



Unaccept a player: Go to Player Lookup and search for the player using the Search For box and the Application Status filter select to Pending All Applications. Deselect the check mark in the Accepted box. Click Save Application Changes.

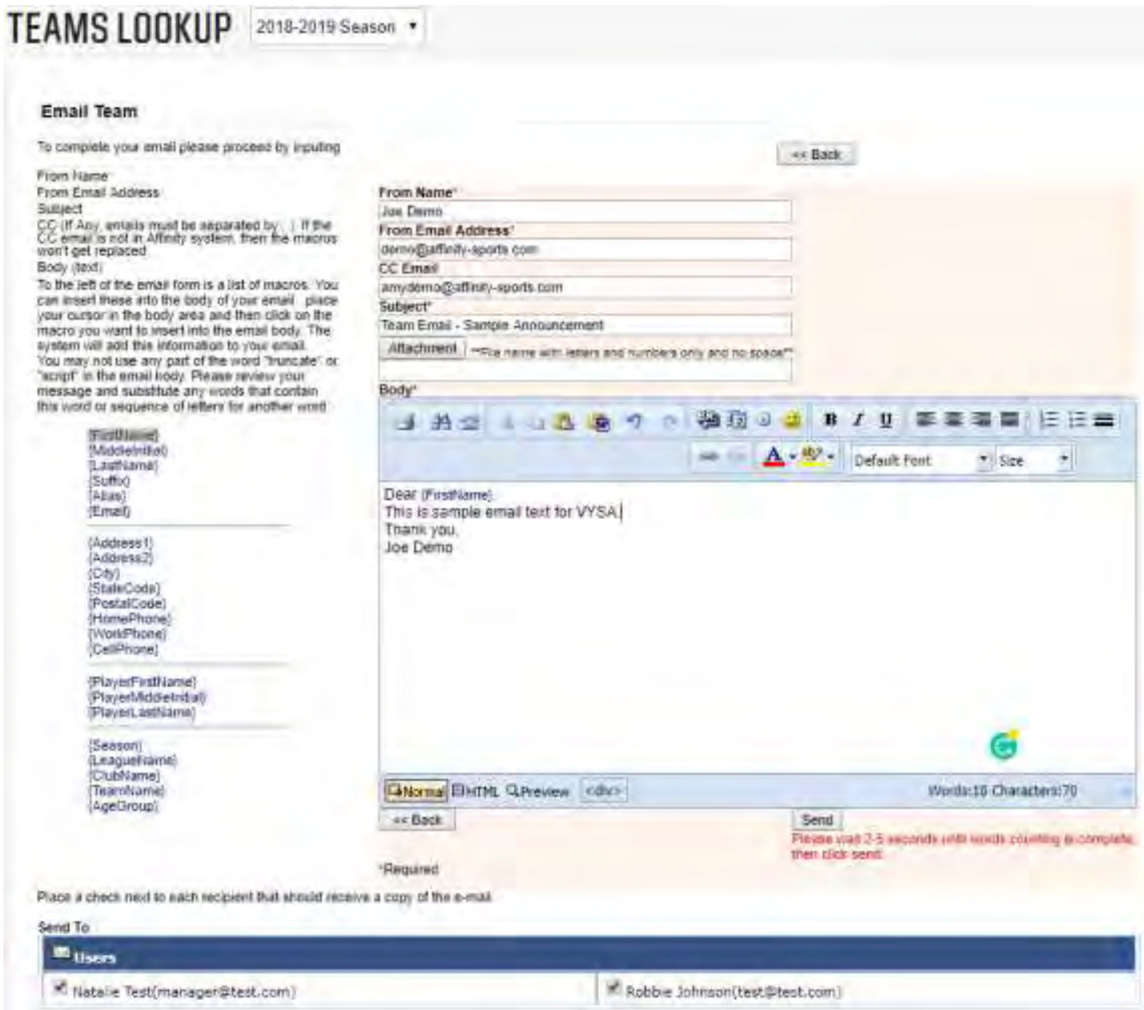
Once the above criteria have been met, click on the player's name to visit their profile. Select the Applications tab. Click the Cancel button to cancel the application.

Emailing Players or Admins

The Affinity Sports Platform allows Club Registrars to email player's parents and admins from the player, administrator and parent lookup functions. Additionally emails can be sent from the Team Roster screens. When you perform a lookup for a particular subset of your members, you will notice an icon in the shape of an envelope at the top far left of the search results and a column under this icon next to each name. This is the icon for sending emails.

Email by Team

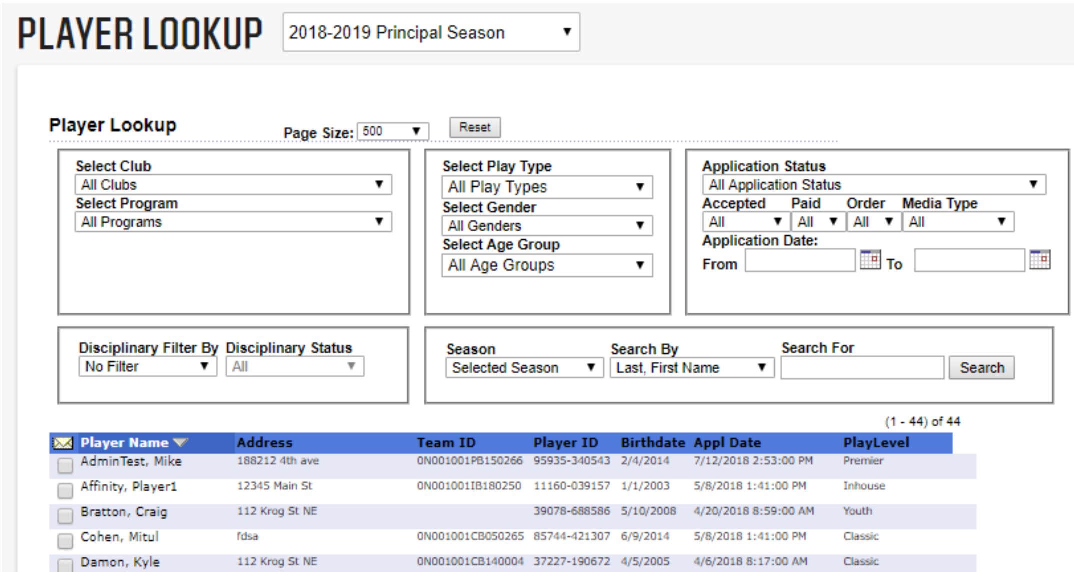
1. Choose Teams and Team Lookup from the main navigation.
2. Select any filters and choose Search.
3. From the Search Results, click on the Team Name to view the Team Details.
4. Choose the Team Roster tab.
5. Click the top envelope icon to select all players or all administrators for the team or check only the individuals you wish to email.
6. Choose the Email Selected button.
7. You will be taken to a content editor screen where you can compose your email.
8. Enter the From Name, From Email address, any cc email addresses, a subject, add any attachments and your message in the body field.



9. Once your email is drafted, you may see the list of recipients below that are scheduled to receive the email. You may add or remove them by checking or unchecking the box next to their name.
10. To send your message, click Send below the message content editor.

Email Players and Administrators

1. Choose Players/Admin and Player Lookup or Admin Lookup from the main navigation.
2. Select the filters you would like to use and choose Search.
3. A list of players or admins based on your criteria displays.



4. Click the top envelope icon to select all players or all administrators or check only the individuals you wish to email.
5. Choose the Email Selected Players or Admin button at the bottom of the search results.
6. You will be taken to a content editor screen where you can compose your email.
7. Enter the From Name, From Email address, any cc email addresses, a subject, add any attachments and your message in the body field.
8. Once your email is drafted, you may see the list of recipients below that are scheduled to receive the email. You may add or remove them by checking or unchecking the box next to their name.
9. To send your message, click Send below the message content editor.

Email Content Editor

Once you have selected the persons you wish to email you will be taken to an email content editor. This editor will allow the user to create a basic email with various font size, type and color and some other basic features. The user is also able to cc additional individuals and upload an attachment.

Managing Admins

Admin Lookup

The Affinity Sports Platform provides users with the ability to search for admins by club, club detail, play type, gender, age group, admin type, certification, application status, or disciplinary action, risk expiration date, season, or name.

1. Choose Players/Admin and Admin Lookup from the main navigation.
2. Select any search criteria from the various dropdown menus and choose Search.
3. From the Search Results, click on the Admin Name to view the Admin Profile.

4. Choose the Administrator Info tab to view or edit admin information. You will also be able to view the admin’s photo and Driver’s License (if applicable).
5. Choose Update after making changes to save.

Admin Profile

- There are multiple tabs under the admin profile or record that perform different functions and allow different information to be updated.

- Administrator Information – Admin name, address, contact information, level of play, Driver's License, preferred role, coaching license, and risk status
- Additional Info – Residence information, and criminal background
- Applications – Shows the details of current and historical applications for the admin, provides the ability to edit and/or cancel the application
- Disciplinary – Provides the ability to track disciplinary items on the admin

- Children – Shows any children of the Admin registered in the platform
- Events – Displays any events the admin has signed up for through the Affinity Sports Event Manager

Editing Admin Information

1. Choose Players/Admin and Admin Lookup from the main navigation.
2. Select any search criteria from the various dropdown menus and choose Search.
3. From the Search Results, click on the Admin Name to view the Admin Profile.
4. Select the tab where you need to add or update information.
5. Choose Update after making changes to save.

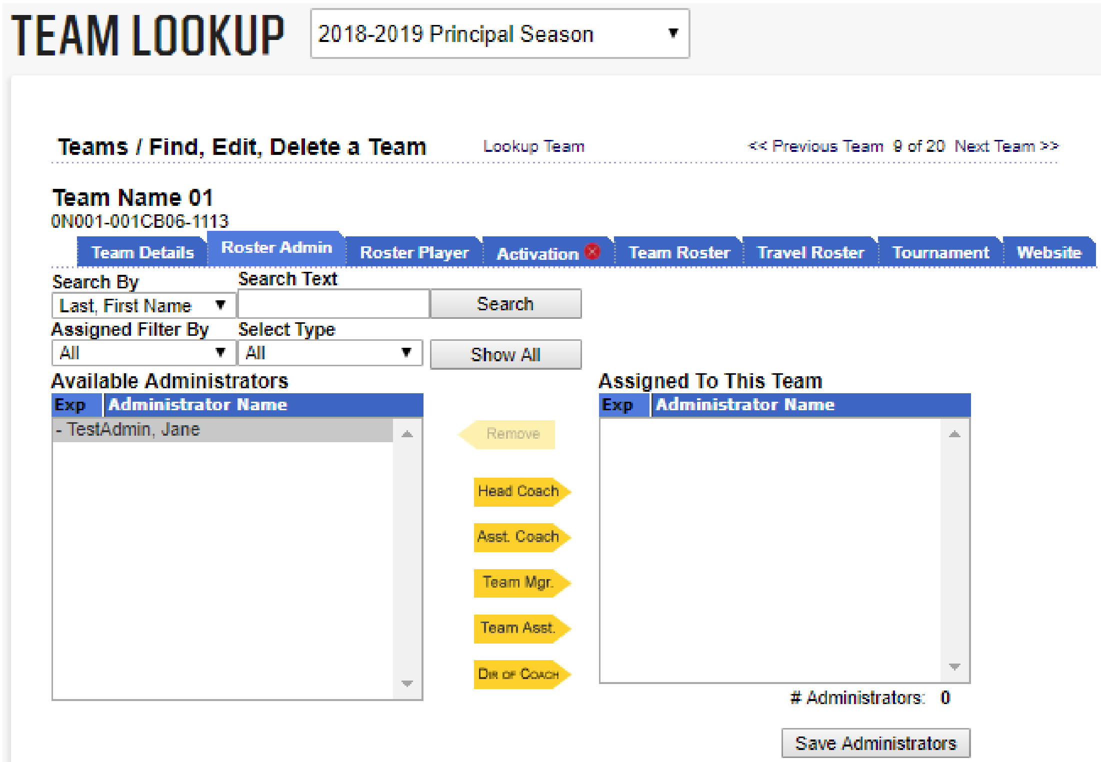
Verifying Admins

Before rostering an admin, the Club Registrar will need to verify the admin details align with business rules, the record includes a photo, and they have completed and passed a background check. The Club Registrar will complete the final approval and verification.

1. Choose Players/Admin and Player Lookup from the main navigation.
2. Select any filters and choose Search.

> NOTE: We recommend using the filter of Pending Applications to find new admin applications that need to be rostered.

3. The list of admins matching the criteria will display.
4. The Club Registrar will view the admin's profile and confirm that background check has been passed and completed and a proper photo has been uploaded.
5. If criteria has been met and your admins have been verified, they may be rostered to a team

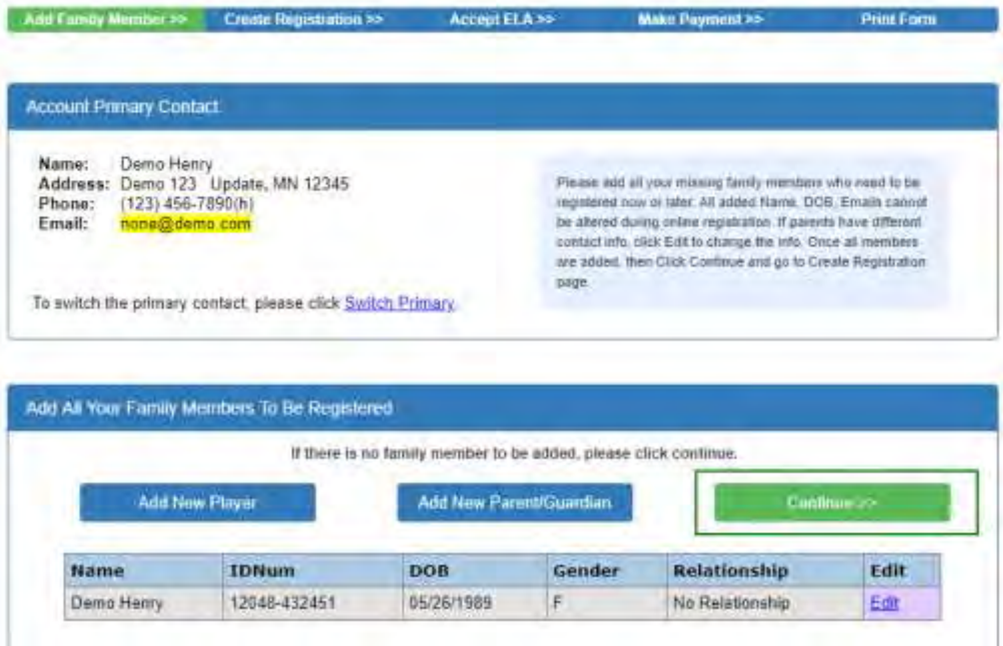


6. Click the name of the admin to select and choose their role to move the admin to the team roster.
7. Choose Save Administrators to save your work.

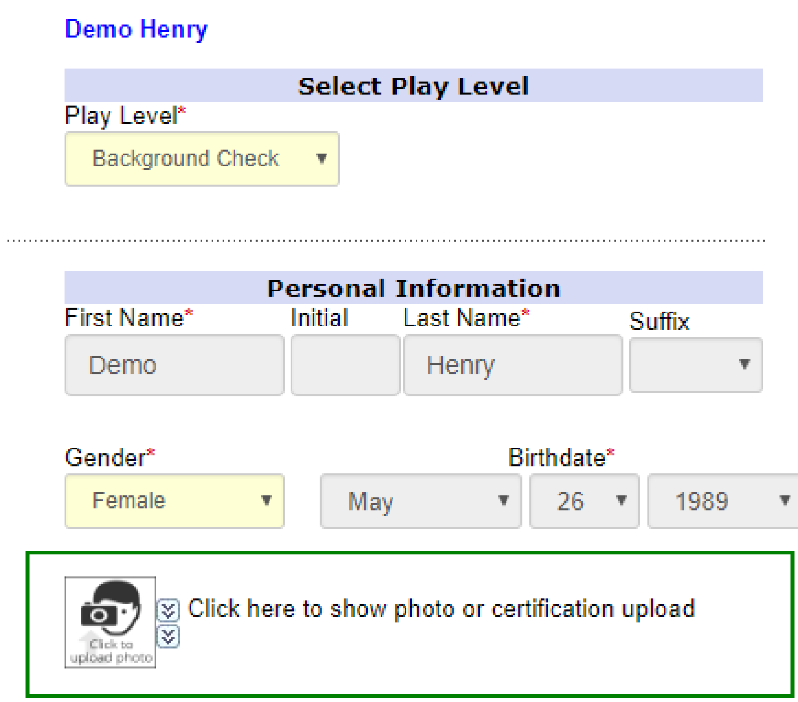
Background Check Submission

All Club & Club Detail Admins, Coaching Staff and Volunteers must complete a Background Check. No volunteer or staff members will be allowed to be added to an approved roster unless they have completed an annual background check. To submit a Background Check advise appropriate personnel follow these steps:

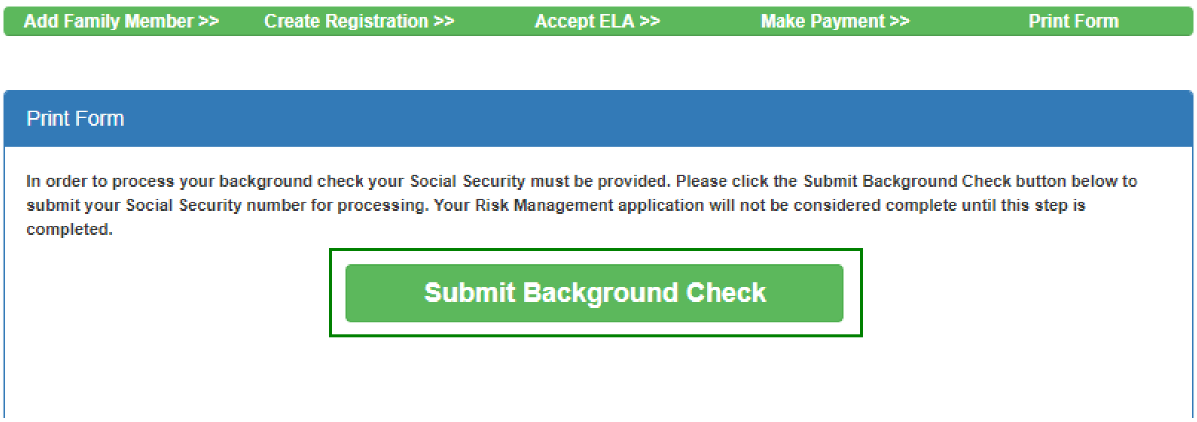
1. To complete a Background Check navigate your browser to:
2. minnesotayouthsoccer-bgc.sportsaffinity.com
3. Click on the Registration tab in the upper right hand corner to begin
4. If you have a user profile in the Affinity Sports Platform, please use your user name and password to register for your Background Check.
5. If not, please select Create New Account.
6. Once your account has been created the application will ask if you need to add any family members. If there are no family members to add, please click Continue.



7. Please select Register as Coach/ Admin button across from your name to begin your application. After you make this selection, a pop-up window will appear on your screen. Select 'Background Check' as the play level from the dropdown menu.
8. On the application any fields marked with a red asterisk (*) are required to be filled out. Please click the down arrows to expand the menu. This will provide an area to upload your photo, concussion certificate, PACT or Safesport Training.

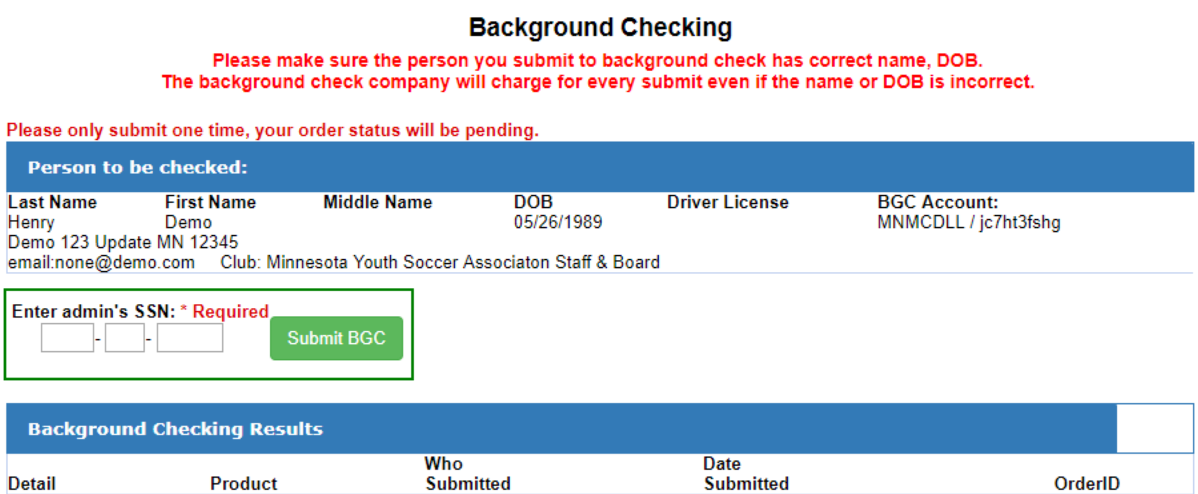


9. Once all information has been entered/ uploaded on the application please scroll down and click 'Save & Next Page'
10. Next, read and accept any ELAs (Electronic Legal Agreements) by checking the box across from each agreement. Once all boxes have been checked click Agree & Continue.
11. There is not a fee required for background checks. Please select No Payment Due, Continue.
12. On the next page click on the Submit Background Check button.



In order to process your background check your Social Security must be provided. Please click the Submit Background Check button below to submit your Social Security number for processing. Your Risk Management application will not be considered complete until this step is completed.

13. Enter in your Social Security # and click on Submit BGC.



Once you have entered your Social Security # and clicked Submit BGC your application is now complete. You can now exit the screen.

Digital Coaching Center

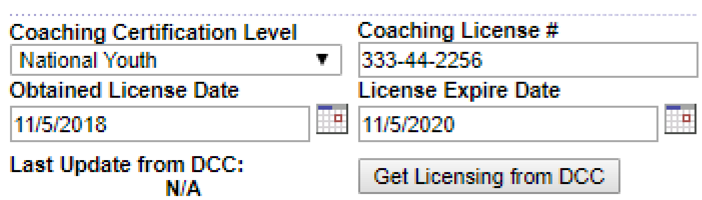
The DCC integration will automatically retrieve and insert available coaching license information from U.S. Soccer into the Affinity Sports Platform. License information will display on a coach's profile when a full match is found between the two databases. Affinity Sports will display the highest license found in the DCC on the coach's record. Coaching License information is retrieved from the DCC using the following match criteria: Admin's first name, Admin's last name, Admin's DOB and Admin's email address.

Retrieving Results from the DCC

With the Digital Coaching Center Integration, Coach License results are automatically updated when a new coaching application is created, when a coach is rostered to a team, and subsequent checks will be triggered 7 days after each of these actions take place.

If you are looking to get license results outside of these triggers, the state association and registrars will also have an option to manually retrieve results.

1. To manually retrieve results, choose Admin Look-up and search for the coach in which you wish to retrieve results.
2. Click on the coach's name to open his or her profile.
3. Scroll to the Coaching Certificate section of the profile, and click Get Licensing from DCC.
4. If a match is found and results are present, the coaches profile will update with this information.



NOTE: You may need to refresh your screen for the results to display.

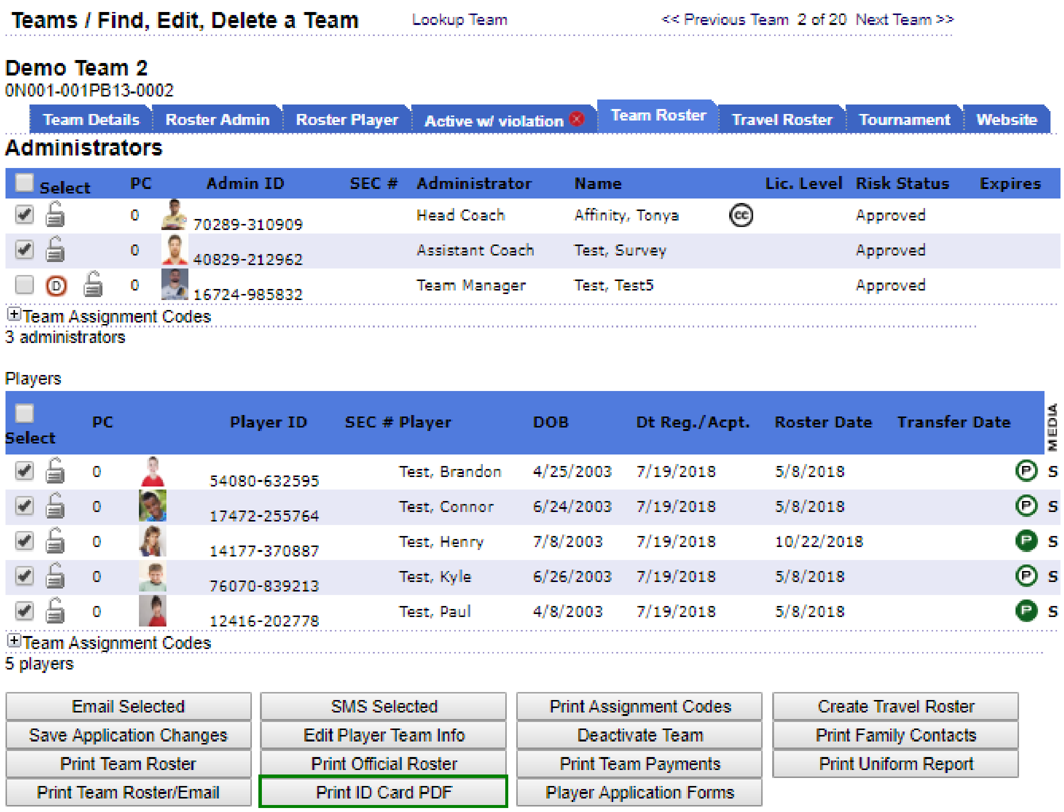
Printing ID Cards

Cards (Player and Admin Passes) can be printed from either the Team Roster screen or from ID Cards under the Players/Admins main navigation.

Team Roster Card Printing

1. To print cards from the Team Roster, choose Teams and Team Lookup from the main navigation.
2. Select any filters and choose Search.

3. From the Search Results, click on the Team Name to view the Team Details.
4. Choose the Team Roster tab.

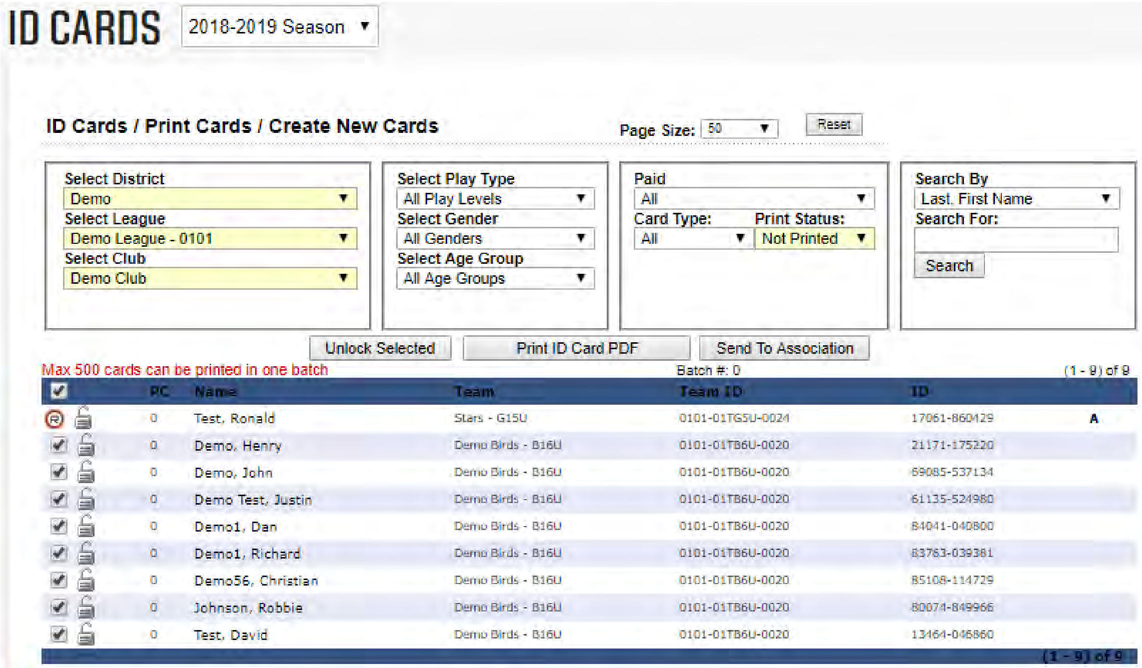


5. Choose Print ID Card PDF from below the list of players.
6. The ID Card PDF opens in a new tab and displays.
7. Choose print by clicking on the printer icon displayed in your ID Cards.
8. Once printed, return to the Team Roster page and indicate if your cards printed correctly.

ID Cards Card Printing

1. To print cards from ID Cards, choose Players/Admins and ID Cards from the main navigation.
2. Select any filters and choose Search.
3. From the Search Results, you will see a list of players or admins meeting the search criteria.
4. Click the box above the list of players or admins to select all players or all administrators or check only the individuals in which you need to print cards.

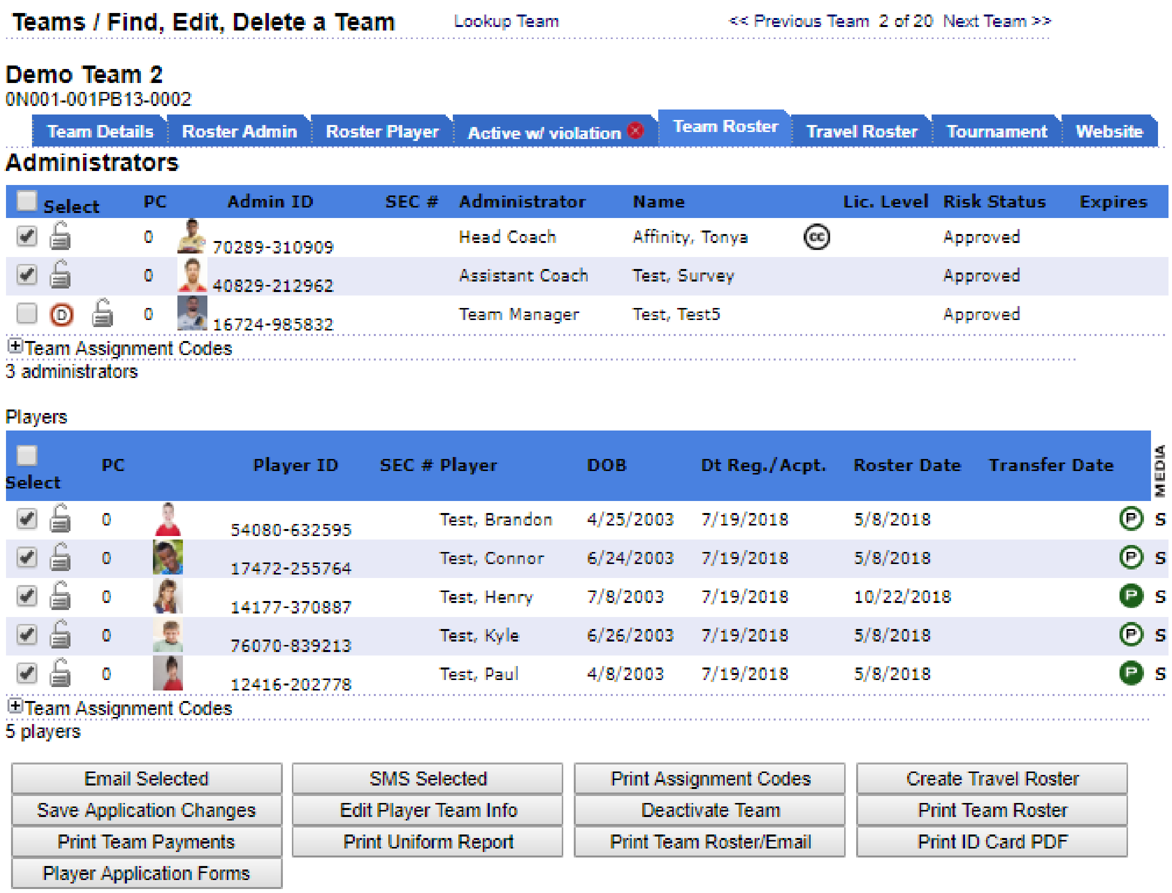
5. Choose Print ID Card PDF from below the search dropdowns.



6. The ID Card PDF opens in a new tab and displays.
7. Choose print by clicking on the printer icon displayed in your ID Cards.
8. Once printed, return to the ID Cards page and indicate if your cards printed correctly.

NOTE: Turn off the pop-up blocker in your web browser to allow the ID Card PDF to display.

Printing Rosters



Team Roster

1. To print a Team Roster, choose Teams and Team Lookup from the main navigation.
2. Select any filters and choose Search.
3. From the Search Results, click on the Team Name to view the Team Details.
4. Choose the Team Roster tab.
5. Choose Print Team Roster from below the list of players.
6. The Team Roster PDF opens in a new tab and displays.
7. Choose print by clicking on the printer icon displayed in your Team Roster PDF.

NOTE: Turn off the pop-up blocker in your web browser to allow Rosters to display.

Event Manager

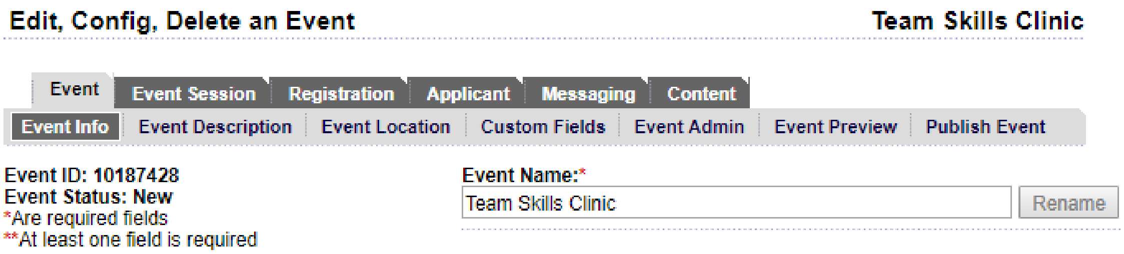
The Affinity Sports Event Manager function allows users to host registrations for special events, clinics, camps, coaching education courses, etc. throughout the seasonal year.

Creating an Event

1. Select Event from the level navigation
2. Hover over Event Manager and select Create and the Event set-up form displays.
    - Event Name – Name of the event
    - Create this Event For – Select the District, Club and Program that is organizing the event.
        - Event View Mode – Determines who can apply to the event. Select 'Open to the Public' to allow any user with an Affinity profile to register
        - Select 'Restricted' to only allow members of your club/league to register
    - Calendar Type Name – Determines what the event is for and what options are available for configuration. Most Youth Events will fall under "Camps & Clinics" and most license courses will fall under "Coaching Education"
    - Allow quantity registration*– If selected to yes, this will allow you to enter the # of individuals you are applying. (used to create a head count of applicants)
    - Require Attendee Name on the Attendee List*– This configuration ties into the previous option. If selected to yes, this asks for the names of the attendees you are registering. ***Most commonly used for Banquets.***
    - Requires registration – Must be checked to allow for event registration
    - Requires Payment – Will require payment information to be entered by user to complete registration
    - Auto Accept – System will automatically accept applicant and send an acceptance email
    - Attendee View Mode – Determines whether or not the general public and/or attendees can view the list of persons signed up for the event
    - Event Start Date – The date the event starts
    - Event End Date – The date the event ends
    - Start Accept Application Date – Date when applicants can begin registering
    - End Accept Application Date – Date on which applications are no longer accepted
    - Seasonal Belonging Year– Year in which the event is classified
3. Once all information has been entered, click Save and Continue.
4. Next, enter the Event Description using the content editor. This description will appear on the public page.
5. Once a description has been entered, click Save and Continue.
6. You will then be prompted to enter the location of the event. Create a new location by typing in the location information or choose from previously entered locations. Click Save and Continue.
7. Enter a Primary Contact. Their name and contact information will appear on the public event page the main contact for the event.

- If you want to ***create a new user,*** enter in their information on the page.
- If you want to ***assign an existing user***, click the Lookup button to locate their account.
- If you want to ***assign yourself*** as the admin, click the Assign Myself button.

8. Click Create. Once the event is created you will be taken to the Event Info tab and have access to additional tabs for configuration.



9. Scroll down on the Event Info tab you will now see two additional configuration options on this page:
   - Hide the Number of Current Register in Public – If selected to yes, this is number of registrants will not display on the event registration page.
   - Age Calculation Date **–** Date used to calculate the applicants age according to the seasonal year for your national governing body/ organization. For seasonal registration events this date will always fall on 12/31/20XX of the current registration year.

Configuring an Event

Event

Event Info: Configurations outlined in the <u>**Creating an Event**</u> section will appear on this tab.
Event Description: Description of the event. This description will appear on the public page.
Event Location: Location of the event. Create a new location by typing in the location information or choose from previously entered locations.
Custom Fields: If there is custom information you need to gather from attendees you will input the questions here. Custom fields created in this tab will be asked to all event applicants during the registration process.
Event Administrator: Option to enter/ edit an Event Administrator. If multiple admins are added to the event the user selected as the primary contact will have their contact information appear on the public event page as the main contact.

- o If you want to ***create a new user,*** enter in their information on the page.
- o If you want to ***assign an existing user***, click the Lookup button to locate their account
- o If you want to ***assign yourself*** as the admin, click the Assign Myself button

Event Preview: This tab will display a preview of your event. The information featured on this page will be visible to the public once your event is set as Active and open for registrations.

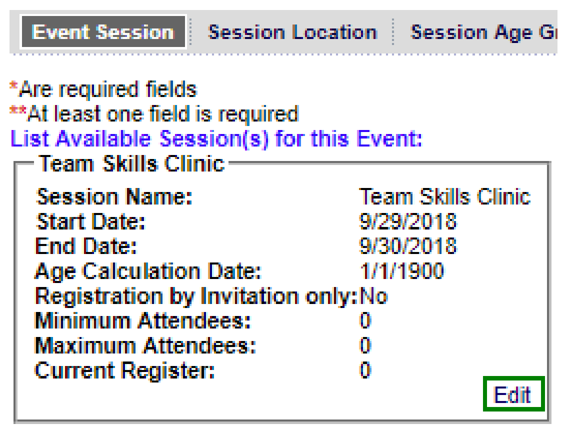
Publish Event: Once you have completed configuring your event, it is ready to be published. From the Select Event Status dropdown menu choose Active. When the event is in an Active status a public URL will be created.

Event Session

Event Session: The system automatically generates one session when the event is created. Additional sessions can be created as needed for various breakout programs within your event.

If you would like to add a new session, simply start entering the new session information on the current page. Once completed, click Create. The new session will appear in the List Available Session(s) for this Event area.

If you would like to edit the system created existing session, select the Edit link in the bottom corner of the List Available Session(s) for this Event area.



- Session Name – The default session keeps the same name as the event. This can be edited as desired.
- Min Attendees – The minimum # of attendees that need to register for the event to take place and not be cancelled
- Max Attendees – The maximum # of attendees that can register to the event session before it is automatically shut off and applicants can no longer apply

NOTE: The system automatically defaults this number to zero. In order for applicants to register to the event this number must be updated prior to publishing.

- # Waiting List – If the session reaches the max. # of attendees, a waitlist can be created in case of any of the previously registered applicants can no longer attend.
- Session Start Date – Date the session starts. Must fall within the event start and end dates. For the default session the event start date will automatically be generated.
- Session End Date – Date the session ends. Must fall within the event start and end dates. For the default session the event end date will automatically be generated.
- Registration by Invitation only – If selected, a customized link will be generated for the session. Only those that register from the private link will be permitted to apply.
- Age Calculation Date – Date used to calculate the applicants age according to the seasonal year for your national governing body/ organization. For seasonal registration events, this date will always fall on 12/31/20XX of the current registration year.
- Recur every week on – If this is an ongoing session that will take place on the same day of the week for multiple weeks the days can be selected to display to registrants.
- Event Description – Description of the specific session.
- Certification License Level – If you selected the Coaching Education as the event type, you will have an extra configuration to select the license level for the event registration.

Session Location: If the session has a specific location that differs from the main event location you may enter the information on this page. Create a new location by typing in the location information or choose from previously entered locations.

Session Age Group: If the session has age/ gender specifications that are more defined than the overall event you can enter that information here. Please be sure to select a gender for the session. If Co-Ed is chosen it can cause complications with participant applications.

Session Itinerary: This feature is unavailable.

Session Staff: If the session has specific staff members you may assign those roles on this page. User types available include Event Administrator, Event Assistant, Head Instructor, and Assistant Instructor

Custom Fields: If there is custom information you need to gather from attendees who are applying to this particular session you may input the questions here. Custom fields created in this tab will only be asked to those applicants registering to this session during the registration process.

Registration

Fees: To begin creating fees, select your fee type from the New Fee Type dropdown menu.

- Select Registration Fee from the new fee type dropdown and enter the desired amount.
- The Other option can be utilized if additional fees or a different fee name is desired.

Fees can be classified as Mandatory (M), Optional Select (OS), or Optional Non Selected (ON).

- Mandatory (M) fees are required be paid during the registration process.

- Optional Select (OS) fees pull into the applicants order and show as part of their total but can be unchecked and not paid.
- Optional Non Selected (ON) fees appear on the payment page but do not pull into the total and the applicant has to check the fee option to purchase the “product”.

Once a fee is created it will appear in the Edit a Fee Type dropdown and can be edited at any time.

Payment: Configuration of accepted payment methods applicants can select for any event fees. Credit Card, E-check, or Manual deposits such as cash, check, cashier’s check, money order, free, scholarship, etc. *These selections can only be configured by an Affinity Sports representative. Please contact the Affinity Sports Support Center or your Technical Account Manager for assistance.*

ELA (Electronic Legal Agreements): ELAs such as online liability waivers, codes of conduct, and refund policy; require players (parent/guardian for minors) and coaches to electronically agree to terms and conditions. The waiver is time/date stamped and is stored in the users account for easy print access at any time.

Age Group: Configure age groups as desired to limit the ages accepted to an event.

Online Flow:

- Use New Event Online Registration Flow: Allows the user to choose between the old event manager public process and the new process. The new process is the default and the old process will be disabled completely once all events that were utilizing the old flow have ended.
- Click here to configure link: Provides the Event Admin the ability to edit each page of the online registration process.
- Copy all: Allows the user to copy online registration configurations from another event. To copy enter the Event ID # and click the Copy N Apply button. The Event ID # is found on the Event Info tab of every event.

Discount: Type in your promo code, expiration date, and discount amount. The code is case sensitive and limited to 6-10 characters. If code is entered as “SKILLS” (all capital letters) the registrant will have to match the case in order for the discount to be applied.

Add Attendee

NOTE: The Add Attendee tab will not appear until you have set your event as Active under the Publish Event tab.

This page will display a preview of the public event page along with an Add Attendee button. As the Event Admin you have the option to internally register an applicant. This will allow them to bypass the online registration process and automatically register them into the event. To internally add an attendee please follow the steps below:

1. Click Add Attendee
2. Click the Find and Register Attendee
3. Search for member by entering their Name, DOB, and gender, or by entering their Affinity ID#
4. Once the member has been located, check the Select box across from their name and click Submit selected.
5. A message reading ‘Successfully Added to [Add Attendee] box on screen behind’ will appear. Click Close.
6. Click the Register button across from their name
7. You will be taken through the application screen for the attendee. Proceed to fill out any required or necessary fields. Once completed you will be taken backed to the Add Attendee page
8. Click Continue
9. All new attendees will be listed on the page. If this event has a fee, click the Create Order link for each attendee. If there are multiple attendees you have added proceed to click Create a single order for all attendees above to create one order for all.
10. Click on the Order Number to enter payment information for each applicant. (If applicable)

Applicant

Applicant: The Applicant tab provides search capabilities, email functionality, financial information, etc. for applicants once their registration has been submitted. Easily view profiles and additional information about the applicants by clicking on their name to be directed to their Affinity profile.

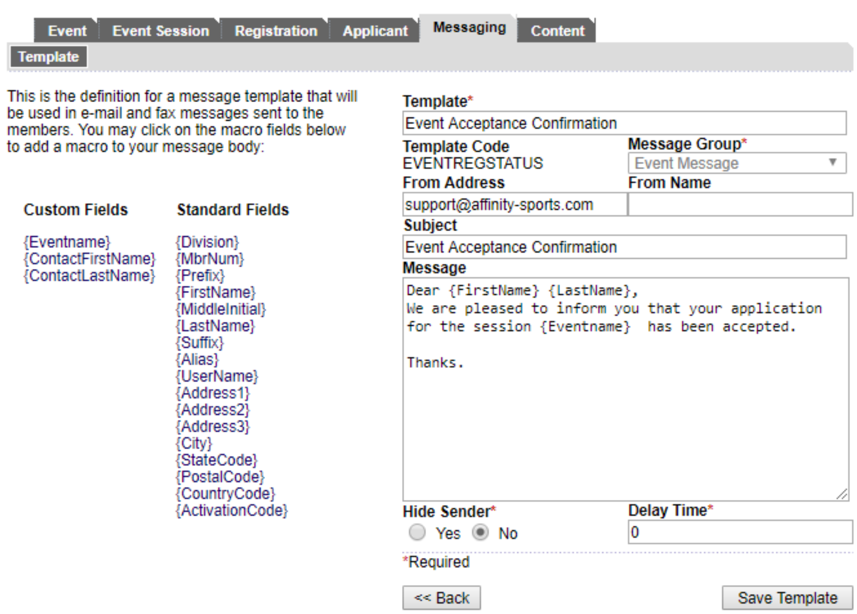
You can also update an application status, class grade, or move an application to a different event session. To do so, the specific session must be selected from the Event Session dropdown menu.

Report: A few different ad hoc reports are available to be pulled displaying attendee information, session information, and remittance/ financial details. Select the report you would like to generate from the dropdown menu, then click the printer icon. Once the report is generated you will be able to export the data into several programs where it can be customize to your needs.

Messaging

Template: Emails are automatically sent to applicants upon registration and upon acceptance of their application. These automatic emails can be customized through templates within the Event Manager. Click on the message template title to edit the template.

- Template – Title of system generated template
- From Address – Email address of the person or organization sending the email
- From Name – Name of the person or organization sending the email
- Subject – Email subject line
- Message – Body of email message
- Hide sender – Allows for the sender's name and email to not be shown to the applicant. This is not advised due to a higher probability that the email will end up in the recipient's spam/ junk folder.
- Delay time – Allows the user to configure the emails to go out after a specific amount of time has elapsed.



TIP: If you look to the left of the message configuration area you will see a group of macros (custom fields and standard fields). Using macros will allow for customized information to be automatically pulled into the email template. Click within the body of the message then click the desired macro to utilize.

Content

Documents/ Forms: The option to upload any custom waivers or forms that applicants might need for the event is available on this tab. Forms will be able to be printed at the final step of the event registration process.