Sportzware User Manual

Part 2: Sportzware Online Membership

SportingPulse is known as the expert in providing innovative technology solutions that make managing sporting organisations easier. Sportzware Online Membership is a member management program that is available to the Touch Football community. It substantially reduces the time and resources needed to administer your organisation. It also allows multiple levels of access available for states, regions and affiliates. The program also captures, stores, tracks and updates member information through a secure online membership database, where you can also customise reports and build historical records. This document outlines in detail specific functions that are available within the program and how to use them effectively.

Table of Contents

Part 2 (Chapter 1): Introduction of Sportzware Online Membership Database

2.1   Overview & Access Levels

The Sportzware Online Membership system (SWM) is an online membership management database. The database is secure through password-protection, and has multiple levels of access available to national governing bodies, states, associations, clubs and members.

Sportzware Membership provides the capacity to substantially reduce the amount of time States/Associations/Clubs/Teams spend managing their membership data, as well as improving the ability to store, track, update and locate information, and build historical records. The system has a vast reporting system, allowing you to customise the exact information you wish to retrieve.

The system allows tiered access at each of the following levels:
- National (access all data)
- State/ Region (access to own data and below)
- Association (access to own data and below
- Club
- Team
- Member

Note: Access to data at association level and below by levels above can be restricted to demographic data only, if required.

2.2   Synchronising Membership Data

IMPORTANT INFORMATION
These instructions should be read carefully before performing your first membership synchronisation.

You can add and edit membership data for the same database in both Online Membership Database and Sportzware Central. When you perform a membership synchronisation, it will check for updates in both databases and bring both databases up to date.

Before your first synchronisation to Online Membership, please carefully note the following;
1. You must enter your Membership Synchronisation code.
2. The Sportzware Central database used for the first synchronisation to Sportzware Membership is the only database that can be used for all subsequent synchronisations. This is to prevent online membership data being overwritten by an erroneous upload from the wrong Sportzware Central database. As such, after the first synchronisation the two databases (online and offline) become linked, and you cannot change the membership upload code in Sportzware Central.
3. On the first occasion that an association synchronises their membership data to the Online Database, it can sometimes take up to 4-6 hours for this process to be completed. The time taken will depend on your Internet connection speed, how many members are in your Database and how much historical player information is in your database. Sportzware Central will appear to be not responding while it is completing the synchronisation process. Please note that after this initial synchronisation all subsequent syncs will only take 2-3 minutes.
4. Remember to back your database before your first synchronisation.

2.3   Sportzware Online Membership Database Log In

A Username and Password is needed in order to log into the Sportzware Membership (SWM) Database.

There are two methods of logging into Sportzware Membership:
  a. Open your browser and go to https://reg.sportingpulse.com
  b. You can also login via your Sportzware Website if you have added a 'Membership Login' section in your menu.

  1. Enter your Sportzware Online Membership username.
  2. Enter your Sportzware Online Membership password.
  3. Click Login to bring up the Sportzware Online Membership welcome screen.

2.4   Welcome Screen

Upon logging in, the welcome screen will appear. The welcome message that appears can be configured by the association in the configuration area (the spanner icon).

Part 2 (Chapter 2): Menu Options

The level you log in at will determine the options available in the left hand menu (the icons), and the number of levels below you which you are able to access (the links listed down the left hand menu).

Menu Icons are;

View – click here to see the club's contact details

Edit – click here to change the club contact details

Statistics – total number of Members, Teams, Clubs, Associations (state and national level only) and States (national level only) in the database

Configuration – provides the association with a wide variety of options for configuring the database (association level only).

Audit Log – click here to see an audit trail of changes made to the club's details

Search – click here to search for a member in your database

Reports – click here to create your own reports on member or team information

Modify Member List – organise players into teams

Member Tags – create your own categories to assign (tag) to members.

The following table shows the menu options available at each level.

	View	Edit	Stats	Configuration	Audit Log	Search	Reports	Modify Member List	Member Tags
National	✓	✓	✓		✓	✓	✓		
State/ Region	✓	✓	✓		✓	✓	✓		
Zone	✓	✓	✓		✓	✓	✓		
Association	✓	✓	✓	✓	✓	✓	✓		
Club	✓	✓			✓	✓	✓		
Team	✓	✓			✓	✓	✓	✓	
Member	✓	✓			✓				✓

Part 2 (Chapter 3): Database Configuration

These options allow the association to organise and manage the setup of their database. To access the Configuration menu, click on the spanner icon in the menu.

Configuration Options are available at the *association level only*. This is because the Sportzware Membership database synchronises with Sportzware Central, which is an association-level application.

2.5   Field Options

Select from a list of over 100 member fields you want to use in your database.

2.6   Member List Display

The Member List is the screen you see when you click on 'Members' in the left hand menu. The headings/fields that appear on this screen can be configured through Member List Display.

The box on the left shows all of the fields available (as activated in Field Options). The box on the right displays the fields selected to be displayed on the member list. Select and remove fields by using the left and right arrows. The fields chosen will apply for the association, its clubs and teams. The order of fields can be changed by using the up and down arrows.

The sort order can be set by selecting a field from the 'Sort by' drop down box below the Selected Fields box.
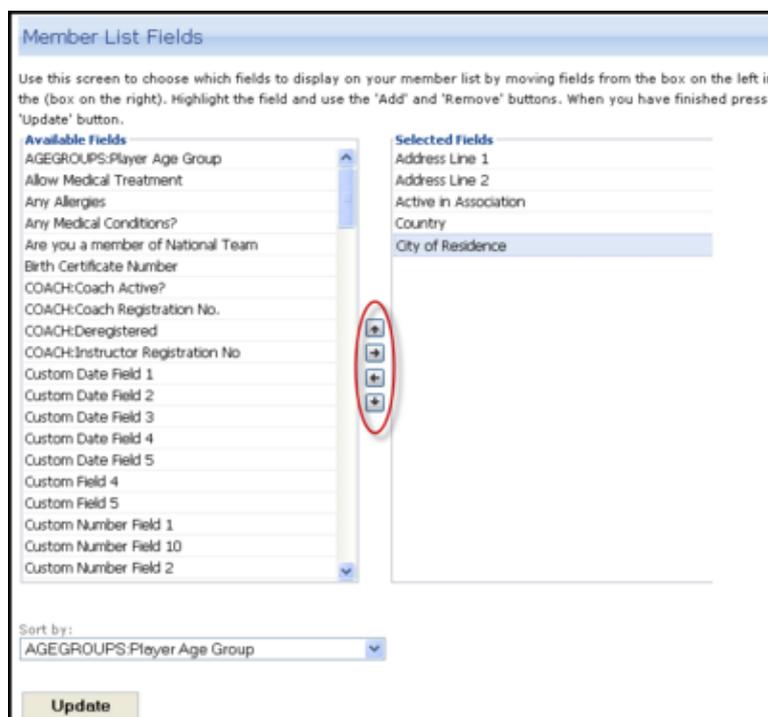
2.7 Products

Products must be set up here before they can be used in a member transaction. Common products include player registrations/subscriptions, competition entry fees or merchandise, but can be anything at all.

Below is a link to a video that covers how to set up a product in the Sportzware Online Membership system. Text instructions can be found below the video.

http://link.brightcove.com/services/player/bcpid30740774001?bctid=41763317001

To Add a New Product
1. Go to the Sportzware Membership Configuration screen
2. Click on **Products**

3. Click on **Add a New Product**

4. Enter the name of your product (E.g. Junior Registration Fee).
5. Enter the cost of this product
6. Enter the grouping category. Grouping Categories allow you to group multiple products within certain categories on the registration form (E.g. Membership Packages, Competitions, etc).
7. Select **Allow multiple time purchasing** ONLY if you would like your members to be able to purchase this product more than once. If the product is only valid for purchase once (i.e. an annual player registration fee) then do not tick this box.
8. The 'Archive Product' tick box can be used at a later date when the product is no longer valid and you wish to archive it.
9. Enter any notes that you want to appear alongside this product.
10. Click **Update** to save the product.

You will then be returned to the updated Products page. You can edit products at any point by clicking on **Edit** next to the product.

Default Products
You may wish to set a default (compulsory) product for new members or teams. This will automatically assign the 'default' product to new members and/or teams as they are added to the database.

This applies for both methods of data entry- either via the online registration form (by the public) or via the Online Membership Database backend (by the administrator).
1. From the main Configuration screen, select **Products**
2. Scroll down to 'Default Registration Products'

3. Under 'Default Registration Product', select the product from the drop down list that you wish to be the default product for new member registrations
4. You may also do the same for new team registrations
5. Click **Update** to save the settings

Note: If you set a default member product, you can check it by viewing the Member Registration Form. You will notice that the default product is already selected for that new member registration. It cannot be removed.

2.8   Registration Form

Associations can set up an online registration form and add it to their website to enable its members to register with an association, or a club or team. In addition to registrations and memberships, the form can also be used for various other types of transactions, such as competition entries or merchandise.

Online registrations can work with or without an online payment gateway. If the registration form does use a payment gateway, the member has the option to pay for the item using their credit card. If the form does not require a payment gateway, the member can simply register without needing to pay for it online. Payments can also be processed manually by the association.

Read full instructions on using the Online Registration and Payment system further on in this document.

2.9   Season Configuration

A season is a defined "Registration Period". It may be by year, as per the below example, bi-annually (E.g. Season 1 09, Season 2 09), or whatever the sport requires.

The Sportzware Membership system can allow for Associations to define their own seasons, or for all seasons to be controlled by the National Body.

Set up your Seasons
1. Click on the configuration icon (spanner) in the left menu.
2. Click on Seasons (if you cannot see this option, it is likely that your sport governing body has not yet requested it).
3. You will see a list of all the seasons created by the National Body, the Association, or both (depending on the permissions allowed).
At the bottom of the screen you are able to set the **Current** and **New Registration Season**.

Part 2 (Chapter 4): Data Management

The following sections cover how to manage club, team, member and competition data.

2.10   Clubs

View Clubs in an Association

From the association level, click on Clubs in the left hand menu to see all the clubs in an association.

Add a New Club to and Association

1. Click on Clubs in the left hand menu to bring up the list of Clubs
2. Click on the **Add Club** icon in the top right hand corner
3. Enter the details in the fields provided ('Name'is the only compulsory field)
4. Click on **Update Club**
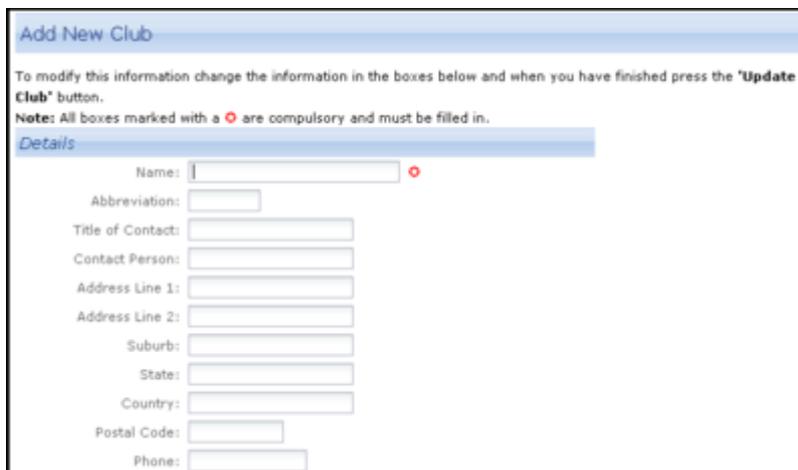
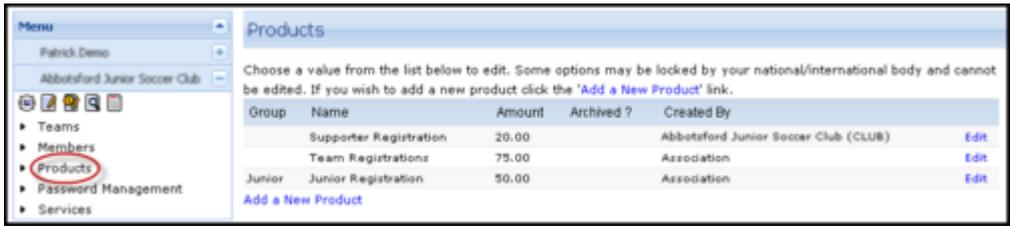*Club Products*

Clubs can create their own club products which can be used in member transactions. It also allows the association to add club products to the 'Member to Club' Registration Form.

1. Log in at the club level.
2. Click on **Products** in the left hand menu. This product list will display all the association products as well as any products created by the club.

3. Click on **Add New Product** to add a club-specific product. The following screen will appear.
4. Fill in the relevant details to add a new product and click on **Update**.

Note: These club products are now available to use in member transactions, as well as for use by the association on the Member to Club Registration Form.

2.11   Competitions

View Competitions in an Association
Click on Competitions in the left hand menu to see all the competitions in an association.

Add a New Competition to an Association
1. Click on Competitions in the left hand menu to bring up the list of competitions
2. Click on the **Add Competitions** icon in the top right hand corner
3. Enter the details in the fields provided ('Competition Name'is the only compulsory field)
4. Click on **Update Competition**

2.12   Teams

View Teams in a Club

Click on Teams in the left hand menu to see all the teams in a club. In brackets next to the team name is the competition that team has been entered into by the Association.

Add a new Team to a Club

1. Click on Teams in the left hand menu to bring up the list of teams.
2. Click on the **Add Team** icon in the top right hand corner
3. Enter the details in the fields provided ('Name'is the only compulsory field)
4. Click on **Update Team**

Note 1: Teams cannot be deleted. This operation can only be done by the Association.
Note 2: The email address entered here is used for the Online Clearances/Transfers system. Clubs need to ensure that the right email address for their clearances administration is entered if the Online Clearance system is to be used.

Edit Team Details

1. Click on **Teams** in the left hand menu.
2. Click on the name of the team you want to edit.
3. Click on the **Edit Team** icon in the top right hand corner.
4. Update the team details and click on **Update Team**.

View Members in a Team

1. Click on Teams in the left hand menu.
2. Click on the Name of the Team you want to view members for.
3. A new level will appear in the menu for that team. Under the name of the team, click on Members. The list of members in that team will appear.

Move Club Members into Teams

1. Click on **Teams** in the left hand menu.
2. Click on the **Name of the Team** you want to move a player to/from.
3. Click on **Members** in the Team menu
4. Click on the **Modify Member List** icon .

Two lists of members will appear. On the left hand is the list of all members in the Club. On the right is a list of all members in that particular team. From here you can move members in and out of that team.

1. To move members into the team, click on their name in the left hand box and click on the **Add** button.
2. To remove players from the team, click on their name in the right hand box and click on the **Remove** button.
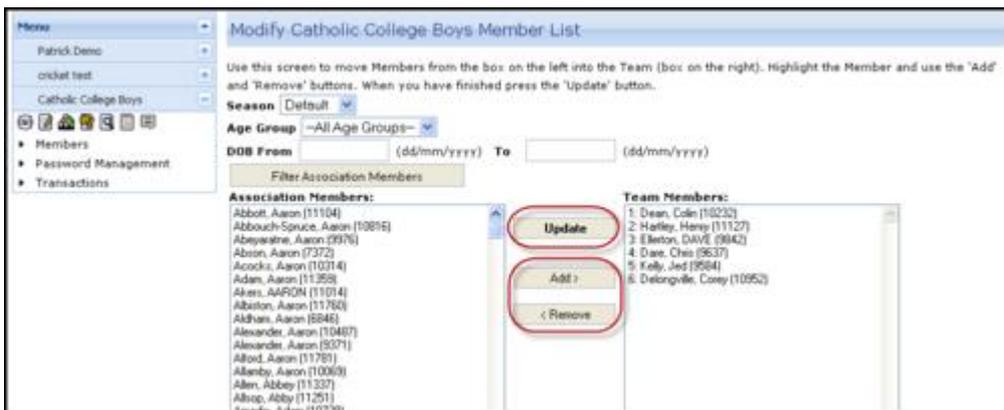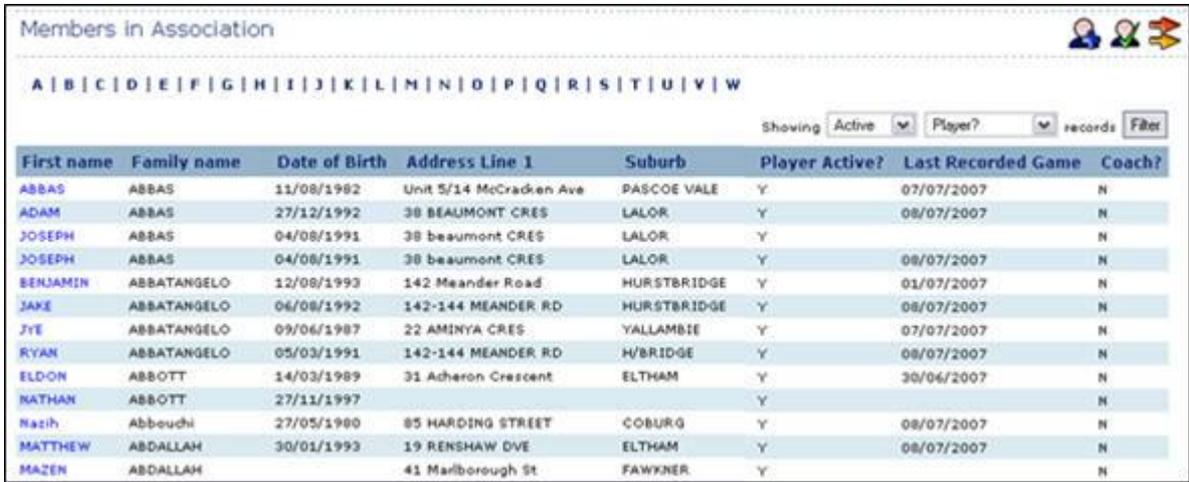

3. Repeat this process for all members you want to add to (or remove from) the team.
4. Click on **Update** when finished.

2.13   Members

View Members in your Club or Team
Click on **Members** in the left hand menu under the name of the Association, Club or Team to see a list of all members that belong to that body.

You can filter by member status (choose to view (1) active members only, (2) inactive members only, or (3) all members) by selecting an option from the 'Showing' drop down list in the top right corner of the Members screen and clicking the **Filter** button.

View an Individual Member Record
1. Click on Members in the left hand menu
2. Click on the name of the member you want to view details for. Their details will appear on the screen.

Another level will appear in the left hand menu beneath that member's name. Four menu options (icons:) will appear;
- View- click here to see a member's details
- Edit- Click here to change a member's details
- Audit Log- click here to see an audit trail of changes made to a member's details
- Member Tags- if your association has set up tags for members, you can click here to assign tags to a member

Underneath these icons there are links to 'View Types' and 'Transactions'.

Add a New Member

1. Click on **Members** in the left hand menu to bring up the list of members.
2. Click on the **Add Member** icon in the top right hand corner.
3. Enter the details in the fields provided and click on **Update Member**. The compulsory fields are marked with a red asterix.

Note: Members cannot be deleted. This operation can only be done by the Association. Members can however be changed from active to inactive, and vice versa.

Add a New Member directly into a Club or Team

Follow this process to add a new member directly into a Team;

1. Click on **Teams** or **Clubs** in the left hand menu to bring up the list of teams or clubs.
2. Click on the name of the team or club you want to add a member to.
3. Click on the **Add Member** icon.
4. Enter the details in the fields provided and click on **Update Member**. The compulsory fields are marked with a red asterix.
5. The new member will appear in the team or club list.

Edit a Member's Details

1. Click on **Members** in the left hand menu to bring up the list of members.
2. Click on the **Name of the Member** you want to change/update details for.
3. Click on the **Edit Member** icon (in the top right hand corner or in the left menu under the name of the member).
4. Enter the new information into the fields and click on **Update Member**.

Add a Member's Photo

1. Click on Members in the left hand menu to bring up the list of members.
2. Click on the Name of the Member you want to change/update details for.

3. Click on **Add Photo**.
4. Browse for the location of the photo file on your computer and click on **Upload**.

Note: Photos should be in JPEG (jpg) format and must be less than 3Mb in size.

Change a Member's Active/ Inactive Status

Changing members' status allows a club to group its members into active (current members) and inactive (past members). This means member records do not need to be deleted, but instead can be kept on file as historical data.

1. Click on **Members** in the left hand menu to bring up the list of members.

2. Click on the **Change Member Status** icon in the top right corner.

3. In the Member list, check boxes will appear in the 'Active in Association' column. Tick the boxes corresponding to active members, and leave the box blank for inactive members.

4. Click on **Update** when finished.

Manage Member Types

Members can be categorised into different 'types'. Accreditation and other details can be added to a member's record based on their 'type'.

Note: Before proceeding, you may firstly wish to configure the positions and types of accreditation available in the drop down lists through the database configuration area.

1. Click on **Members** in the left hand menu to bring up the list of members.
2. Click on the name of the member you want to view/edit types for.
3. In the menu bar on the left hand side, click on **View Types** under the name of the member.
4. Five 'types' available are :
    - Player
    - Coach
    - Match Official
    - Official
    - Miscellaneous

Click on the Type you want to add details for.

Player
1. Click on **Player**.
2. Click on **Edit Details**.
3. Update the details as required and click on **Update Player Member Type**.

Coach
1. Click on **Coach**.
2. Click on **Edit Details**.
3. Update the details as required and click on **Update Coach Member Type**.
4. To add an Accreditation qualification, click on **Add New** under 'Accreditations'.
5. Enter the required details and click on **Update Accreditation**.

Match Official
1. Click on **Match Official**.
2. Click on **Edit Details**.
3. Update the details as required and click on **Update Match Official Member Type**.
4. To add an Accreditation qualification, click on **Add New** under 'Accreditations'.
5. Enter the required details and click on **Update Accreditation**.

Official
1. Click on **Official**.
2. To add an official's position, click on **Add New** under 'Positions Held'.
3. Enter the required details and click on **Update Position**.
4. To add an accreditation qualification, click on **Add New** under 'Accreditations'.
5. Enter the required details and click on **Update Accreditation**.

Miscellaneous
1. Click on **Miscellaneous**.
2. To add a position, click on **Add New** under 'Positions Held'.
3. Enter the required details and click on **Update Position**.
4. To add an accreditation qualification, click on **Add New** under 'Accreditations'.
5. Enter the required details and click on **Update Accreditation**.

Move Members between Clubs

An association is able to move members in and out of clubs through the 'Edit Clubs' button, located at the bottom of the individual member record screen. This option is not available to clubs.

The Edit Clubs screen shows the list of clubs in the association, and allows you to determine which clubs the member is active or inactive in by using the checkboxes.

Clubs in which the member is inactive will have 'read-only' access to the member's details, i.e. They can see the member's record but cannot edit it.

A member can also be deleted from a club. Deleting a member from a club will completely remove the club's access to the member's record. A member's status in their current (active) and previous (inactive) clubs is displayed at the bottom of their record, as shown below:

Part 2 (Chapter 5): Communications

2.14   SWM Communicator

The Communicator module of Sportzware Online Membership allows you to communicate with your members at all levels both via email and SMS.

To access the Communicator click on the icon in the menu
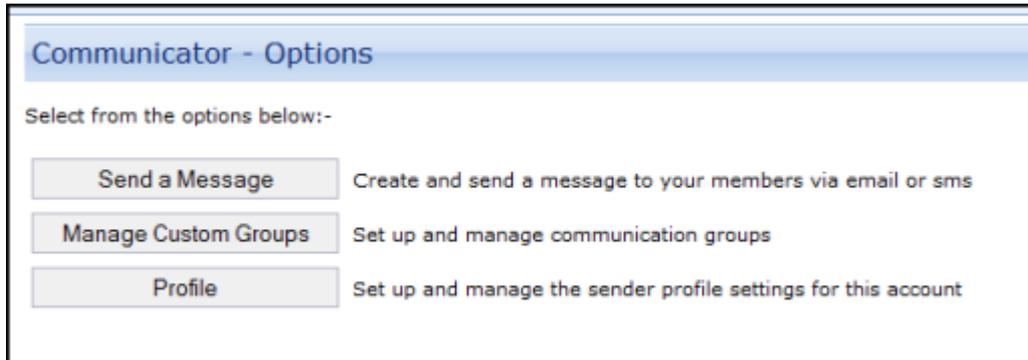
You are presented with 3 options:
- Send Message - Create and send a message to your members via email or sms
- Manage Custom Groups - Set up and manage the communications groups
- Profile - Set up and manage the sender profile settings for this account

2.15   Send a Message

The send a message area is where you can select the recipients you wish to receive your communications and then where you actually compose the message and send them.

The orders of steps in the Send Message areas are:
1. Select the list of Recipient
2. Decide whether you will Email, SMS or send a combination of the two to your selected recipients
3. Compose the messages
4. Send the composed message to the selected recipients.

Recipient Options
Choosing Your Recipients
From the Communicator menu, click on **Send Message**. Three options are available;
- Membership Group
- Custom Group and
- Remembered Reports

Part 2 (Chapter 6): Member Transactions

Each member has their own Transactions area. The Transactions area tracks member 'purchases' and payment information.

The Transactions area is automatically updated each time a member makes an online transaction through the online payment gateway. Transaction details can be entered manually if online transactions are not being used by the association. This can happen in two ways;

- The club can manually add a transaction to an existing member's record.
- The association sets a default product so that every time a new member is added to the database, they will automatically be given that default product - 'E.g. 2009 Player Registration'.

2.16   Update a Transaction

To view or update details of an existing member transaction, click on the Item Name in the transaction list. Update the transaction details as required and click on Update Member Transaction.

2.17   Delete a Transaction

A transaction can be deleted by clicking on the Delete Transaction link that corresponds to the transaction.

2.18   Add Payment Details Manually

Payments for transactions can be manually recorded by the association if payment was not submitted through the online payment gateway. This may be the case if the association does not provide an online payment gateway, or the member does not wish to submit their payment over the Internet. Instead, the member may prefer to pay in cash, cheque, or EFTPOS. These details can be recorded by the association through the following steps:

By Association
1. The first step is to locate the member you want to record the transaction for. From the Association menu click on the search icon [Q] and locate the member you want to add a transaction for.
2. Open the member's record.
3. In the menu bar on the left hand side, click on **Transactions** under the name of the member. A list of transactions for that member will appear.

4. To view the transaction, you may need to filter for 'Unpaid' transactions using the Filter option.
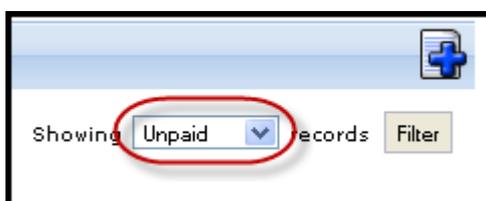
The unpaid transactions will appear. You have two options for processing a payment – 'Make a Manual Payment' or 'Pay via Online Credit Card Gateway'.
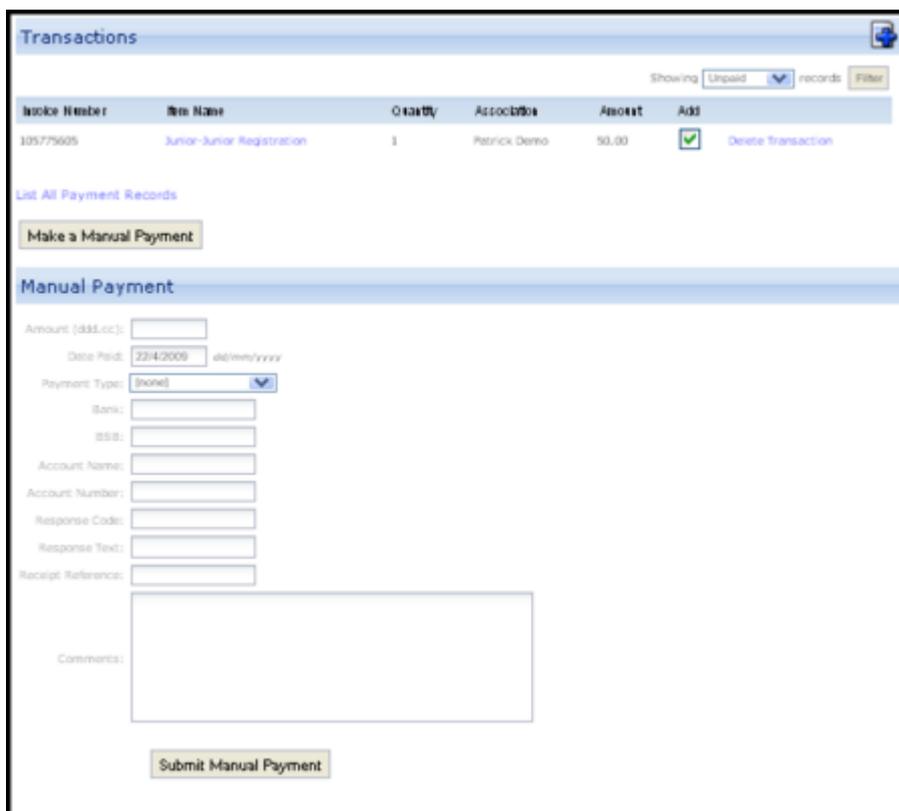
<u>To make a manual payment</u>

1. From the member's list of transactions, select the transaction that you would like to record a payment for by ticking the **Add** box corresponding to that transaction.
2. Click on **Make a Manual Payment**.

3. The Manual Payment fields will appear. Enter the payment details and click on **Submit Manual Payment**.

The other option - Pay via Online Credit Card Gateway – allows a credit card payment to be processed on the member's behalf. The association must have an online payment gateway set up in order to process the payment, and will require the member's credit card details.

By Club

Both the association and club can pay via Online Credit Card Gateway only. For this to be available the association must have an online payment gateway set up, and the association or club will need the member's credit card details.

Once a payment has been manually processed, the member's transaction will be flagged as 'paid'. Select Paid from the filter drop down box and click on Filter to view all paid transactions.

Part 2 (Chapter 7): Online Membership Reporting

1. Click on the **Reports** icon ▭ to access the Reports Manager area within the database.
2. Select the area within the database you wish to report on, such as **Members, Teams, Clubs, Contacts, and Competition** etc.

Note: these areas will differ depending on which sport you are involved with and the level of access you have within the database - E.g. Team Reports are not available at the team level.
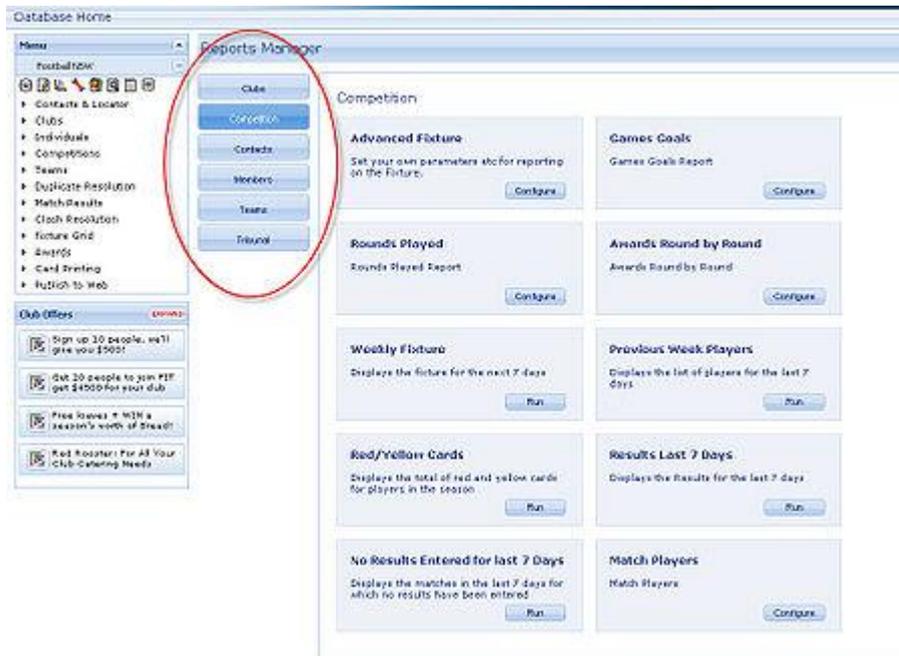
3. Information is then grouped together into areas such as Personal Details, Contact Details, Financial, Medical, Identifications, Member Types, Seasons, and Affiliations etc.

Click each heading text to expand the group and see the fields available to select from each group.

4. Select the fields you would like to appear on the report by dragging them into the 'Selected Fields' area to the right.

5. To filter records, select an option from the drop down list next to each selected field and enter in the parameters you require.

6. If you only want the report to display unique values (e.g. each member can only appear once in the report) select 'Unique Records Only' from the Show field in the Options box. (Alternatively you can select 'Summary Data' or 'All Records').

7. Select the Sort Options that you require for your report.

8. From the Report Output section, select whether you would like your report to be emailed to you (in text format) or displayed in a new window/tab within your web browser.

9. To generate your report, click on the 'Run Report' button

Note: there are two 'Run Report' buttons on your screen - both will perform exactly the same function.

Saving a Report

10. If you would like to Save your report, click the' Save' button in the 'Saved Reports' section at the bottom.

11. You will be prompted to give your Saved Report a name - then click the Save button within the popup box.

12. Once you have clicked 'Save' within the popup box, your page reloads and you should received a notification 'Report Saved' at the top of the Reports screen.

Your report will now be generated and either emailed to you or displayed in a new window.

Working with Saved Reports

13. From the 'Saved Reports' section, select the Saved Report you wish to work with.

14. If you would like to **Run** a previously saved report, select 'Run'
15. If you would like to **Edit** a previously saved report, select 'Edit' - this will enable you to change the fields and criteria used within your Saved Report before running it.
16. If you would like to **Delete** a previously saved report, select 'Delete'

Part 2 (Chapter 8): Duplicate Resolution

Sportzware Online Membership checks for duplicates of member records across associations. You will be alerted to these duplicates in your membership database. The duplicate resolution function will allow you to resolve or ignore these duplicates.

Duplicate Resolution is only available at the association level (however clubs are able to mark members as possible duplicates for the association to resolve).

Associations and their clubs will create duplicates from time to time. A common example is when a database is first set up, neighboring associations/ leagues may share members. The database will identify this and offer the ability to consolidate the member's record.

At the completion of each membership synchronisation (performed in Sportzware Central) the Online Membership Database will inform you of the number of possible duplicates you have and you will be invited to tend to them immediately.

It is important that duplicates are resolved quickly as clubs may select different versions of the same person and assign them to matches, effectively splitting a single person's participation data between two separate records. There are some functions that cannot be performed on a member who is flagged as a possible duplicate until the duplicate is resolved.

What is a Duplicate?
The database checks for duplicates each time a new record is created. All new members added to the database are checked against existing database members for 3 things:
1. First Name
2. Family Name
3. Date of birth
If an exact match on all three fields is found, both records are flagged as possible duplicates.

2.19   View Duplicates

1. When you first log into your database a notice will appear alerting you of any possible duplicates (red text).

2. To proceed to the Duplicate Resolution screen, click on the red text- **Click here to resolve them**.
3. Alternatively, click on the **Duplicate Resolution** link in the association menu at any time to go to the Duplicate Resolution screen. The list of possible duplicates will be shown.

Duplicate Resolution

The list below is of people that have been added that match another person within the database.

To resolve the problem you must choose one of the options beside each person and then press the 'Update Duplicates' button.

☑ Show warnings

[Update Duplicates]

	Problem Record (New Record)	**Suggested Match** (Existing Online Data)	**Choose option**
Firstname	Josh	Josh	○ This is the same person (use new data)
Surname	Smith	Smith	○ This is the same person (keep existing data)
Date of Birth	01/03/1980	01/03/1980	○ This is a new person
Date Last Updated	07/02/2008	07/02/2008	○ Oops, delete this person
Date Created Online	07/02/2008	07/02/2008	● Ignore this person for now
Date Last Played		03/02/2007	
Active Player ?		Yes	
Address 1	123 Main Street	123 Main Street	
Suburb	Box Hill	Box Hill	
State	VIC	VIC	
Country			
Association		DEMO Payment System (Hockey)	
Status	Active	Active	
Club			
Number			

[Update Duplicates]

The member fields provided on the Duplicate Resolution screen give the user the information required to decide upon the best option for resolving the duplicate record. The data is displayed in two columns. The new or problem record is on the left (which has created the duplicate) and the existing record is on the right.

Whilst the duplicate has been determined by only three fields (first name, family name and date of birth) the other fields are provided in order to assist in determining which of the five options is the correct one/ most up to date for each individual.

Please note that the system is able to load a maximum of 300 duplicates in one go. In practice it is not usual for the association/ league to have over 300 unresolved duplicates, even during a registration period. You do not need to deal with all 300 at any one time. In fact it is usual to deal with a smaller number and reload the page from time to time.

2.20   Manually Mark a Member as a Duplicate

This option is available to clubs as well as associations. It is possible for a member to have duplicate records but not be identified by the system. This would occur if any of the three fields are not exactly the same (E.g. incorrect date of birth or spelling error in name). In cases such as these the member can be 'manually' marked as a duplicate.

To manually mark a member as a possible duplicate:
1. Click on the Mark Member as Duplicate icon at the top right hand corner of the member details screen.

2. The following screen will appear. Click on the **Mark as Duplicate** button.

Mark as Duplicate

If you believe the Member named below is a possible duplicate, click the **'Mark as Duplicate'** button.

This will mark this Member as a duplicate for your Association to verify and resolve.

Steven Idnurm

NOTE: Only mark the duplicate Member, not the Member you believe may be the original.

Mark as Duplicate

3. The member will be added to the list of possible duplicates for resolution.

Note: In the instance of a member having two records within the same association database, the association should mark the most recently added record as the duplicate, not the original record. They should also ensure that the three key fields (first name, family name and date of birth) are identical before marking the member as a duplicate.

Part 2 (Chapter 9): Contacts and Locator

The Contacts and Locator module of the Sportzware Membership system is where clubs and leagues/associations can store and publish their important details, contacts and venue and location information. It is also where Leagues and Clubs can set the parameters for their results in the public search functionalities in their relevant sport.

Note: The Contacts and Locator module is an upgraded version of the Services module. All information that was contained in the Services area has been saved and will not be deleted from the database.

To access the Contacts and Locator module click on the "Contacts and Locator" link in the left-hand menu.
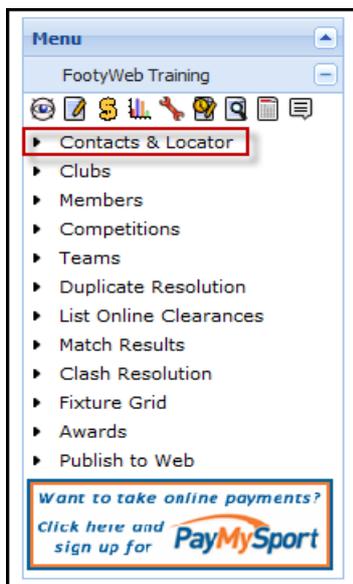
On the page that will open you will see three options at the top of the screen;
- Details
- Contacts and
- Locator

Next to these section titles, there will be an icon that will represent the status of the section. If the icon is a green tick it means that valid information has been entered and saved in the section. If the icon is grayed-out cross then information needs to be added to the section and it is not set to publish to the website.

These are displayed below.
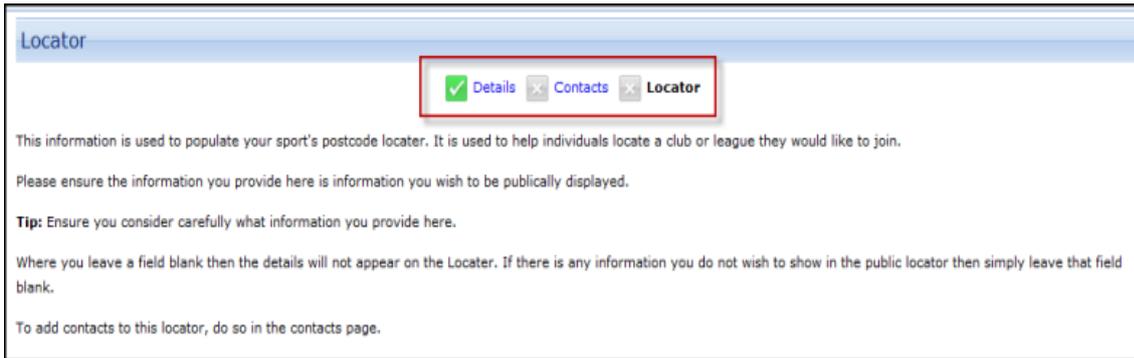
To access one of the areas click on the section title.

Below is a link to a video that covers all the components of the Contacts and Locator module in the Sportzware Membership System.

http://tv.sportingpulse.com/services/player/bcpid30740774001?bctid=475282743001

Conclusion

On completion of the Part 2 of this manual, you should now be ready to install and start using Sportzware Online Membership Database and its various components. In summary, Part 2 covered:

Part 2 (Chapter 1): Introduction of Sportzware Online Membership database- Overview and Access Levels, Synchronising Membership Data, Sportzware Online Membership Database Log In, Welcome Screen.

Part 2 (Chapter 2): Menu Options

Part 2 (Chapter 3): Database Configuration- Field Options, Member List Display, Products, Registration Form, Season and Configuration.

Part 2 (Chapter 4): Data Management- Clubs, Competitions, Teams, Members.

Part 2 (Chapter 5): Communications- SWM Communicator, Send a Message.

Part 2 (Chapter 6): Member Transactions- Update a Transaction, Delete a Transaction, Add Payment Details Manually.

Part 2 (Chapter 7): Online Membership Reporting

Part 2 (Chapter 8): Duplicate Resolution- View Duplicates, Manually mark a member as a Duplicate.

Part 2 (Chapter 9): Contacts and Locator

If you have any further queries about these steps, please read back through the excercises.