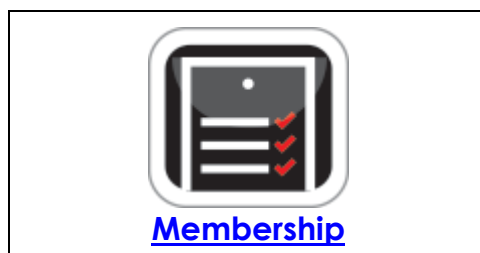


Little Athletics Victoria – SportsTG

Registration Payments



- Above is the key areas of the portal which can relate to emailing with Little Athletics Victoria and its members
- Our session this evening will provide an overview viewing payments (paid/unpaid) preparing for registration days, competition days

- **IMPORTANT INFORMATION FOR USING SPORTSTG**

Preferred Browsers to use Chrome / Firefox



DO NOT USE Internet Explorer



HELPDESK

<https://helpdesk.sportstg.com/hc/en-us> or

Membership Helpdesk: <https://helpdesk.sportstg.com/hc/en-us/categories/200042240-MemberDesq>

CONTENT

Member Status'

The Member will be sitting in one of three different statuses (please see below), click on the icon under the **Status** column to change the member status from one to the next.

Once a member is **Active**, they can only be changed between **Active** and **Inactive**, you can't switch a member back to Online.

1. Active

Active members are those members or records that your organisation deems to still be actively involved in your organisation.

These might be paid members or unpaid but have generally been registered in the past
Records with an Active Status can be identified by the "green tick" in the Status column of your members listing.

2. Inactive

Inactive members are those members or records that your organisation deems to still be no longer involved in your organisation they have either lapsed or become too old.

These might be former members that haven't renewed in a number of years, deceased members, or people who have informed your organisation they no longer wish to be involved.

Records can only be made Inactive by updating the status of Active to Inactive, this is done by clicking on the "green tick".

Records with an Inactive Status can be identified by the "red cross" in the Status column of your members listing.

3. Online

Online members are those members or records that have recently joined your database (NEW MEMBERS)

This status is assigned automatically and is a flag to your organisation that you have had new members or records added to your database.

We use this this status as a workflow to check and approve PROOF OF BIRTH

Before making an Online record Active, Proof of Birth must be sighted then the profile can be activated by the two step process.

<https://assets.imgstg.com/assets/console/customitem/attachments/ONLINEmembersactivatingstatus.pdf>

Records with an Online Status can be identified by the "light green world icon" in the Status column of your members listing.

REMEMBER - Once a member is Active, they can only be changed between Active and Inactive, you can't switch a member back to Online.

We recommend to all organisations to never delete a member or record. Our recommendation is to use the Inactive Status to flag records that are no longer actively involved with your organisation, or in the case of duplicate records, to perform a merge.

Additional Information: Each member or record in your database will have a defined Member Status. The way you use each status is to be interpreted by your organisations requirements, there are four statuses in total. These are: Active, Inactive, Online. A member's status can be identified by the icon display in the Status column of the members listing.

Registration Declarations

Little Athletics Victoria set up a declaration each season for Centres – which pertain to items parents / guardian's; must agree too during the registration process. A link of what Little Aths Vic provides is below and does not need duplicated in your console. If you wish to add your own at Centre or Club level (this might relate to duties or the like). Please go to Members > Declarations – there are three separate declarations you can use.

https://assets.imgstg.com/assets/console/document/documents/20160915044816LAVic_Member_Declaration_2016-2017.pdf

Custom Fields

Custom fields can serve a number of purposes they can ask questions that may be specific to your Centre or club – they can be accessed and viewed in:

Admin > Custom Fields >

There are 5 types of custom fields within the console each have a maximum number of questions you can request information for types are available below with the quantity in brackets – for more information please click on the link below:

Text Box (6) Date (4) YES / NO (4) Number (2) List Box (4)

<https://helpdesk.sportstg.com/hc/en-us/articles/202330114-Step-3-Adding-Custom-Fields>

LINKING MEMBERS

Linking members enables Centres who have family registrations the ability to register all children in the convenience of one process without physically logging into each child's profile.

Quick Steps: Go to Members > Members Listing >

1. Within the Management Console, select **Members** from the top menu, then **Members Listing** from the left menu
2. Click on the **Links** button at the top of their Member Detail page – if it does display >
3. Complete a search for the member that you wish to create links for, click **Edit** next to their name, click on the **Links** tab and set them as a **Primary Member**, then **Save**
4. Complete a search for the member that you wish to create links for, click **Edit** next to their name, click on the **Links** tab and set them as a **Primary Member**, then **Save**
5. On this page you will need to find the Secondary Members to attach to the Primary Member, in other words, the other members of the family or group membership. You can do this by completing the relevant fields and clicking on **Search**
6. To attach the Secondary Member, click on the **Link** button, displayed by a link of chains to the right of the Member's name, this will then attach the member underneath the Primary Member in the membership

Additional Information:

To be able to create the links, you first need to set the Primary Member, this is usually the Parent, Main Adult or Eldest Child in the membership. You can edit this by going into the Primary Member's record, and selecting '**Yes**' to '**Primary Member**' under '**Links**'. Once the Primary Member has been selected, the **Links** button will appear on their Member Detail page

Removing links should be done in the lowest tier of the organisation – if you are unable to link or remove links please contact Kim for support.

VIEWING MEMBERS DASHBOARD

Members > Dashboard

The dashboard gives you real time reporting. All numbers are up to date to the time you accessed the page.

1. Within the Management Console, select **Members** from the top menu, then **Dashboard** from the left menu.

Member & Financial Status: count of members by member status and financial status

Gender & Age: count of member by gender and age

Member Addition: count of member based on add date to the console

To enable a more accurate idea on who has paid and unpaid this can be done via the registration fees page

VIEWING PAYMENTS DASHBOARD

Quick Steps: Go to Subscriptions > Transactions > Dashboard

1. Within the Management Console, select **Subscriptions** from the top menu, then **Transactions** from the left menu.

2. Select **Dashboard** from the expanded left menu. The dashboard gives you real time reporting. All numbers are up to date to the time you accessed the page.

3. The dashboard will default to the **Transaction Status** tab. This tab provides an overview of the total number of transactions (Paid, Unpaid, Cancelled and Refunds) in your database for the dates displayed at the top of the screen.

4. Click the **Payment Analysis** tab. The analysis tab will show you how many payments have been made to your organisation for the current day (today), each day for the current month and then an aggregated count for previous months.
5. The **Payment Method** tab will show the breakdown of transactions by the method of payment noted in the system. – **Reminder Manual Payments are not allowed – all payments must be online.**

TIERED ORGANISATIONS VIEWING PAYMENT LISTINGS

Centres with clubs can view their payment listings by logging into their Centre console and going to **Registration Fees – Centre / Club Payments Received** please see the below link for more information

<https://helpdesk.sportstg.com/hc/en-us/articles/202747660-Tiered-Organisations-Payments-Received>

CANCELLING AN UNPAID TRANSACTION

1. Within the Management Console, select **SUBSCRIPTIONS** from the top menu, then **TRANSACTIONS** from the left menu.
2. Select **UNPAID** from the expanded left menu.
3. Find the transaction that you wish to cancel in the Unpaid Transactions listing. Use the **SEARCH** function if you have more than one page of transactions (search by surname or transaction no)
4. Click **CANCEL** next to the transaction you wish to cancel.
5. Complete the comments with the reason for cancelling, then click on **SUBMIT**.

The above may relate to someone that has already paid and is also in Unpaid – or it may be a member that have had their trial but didn't enjoy and won't be registering.

CANCELLING A PAID TRANSACTION

Please contact Kim in this instance – no PAID transactions should be cancelled nor refunded by a Centre – once a member has paid and if they require a refund this must be put in writing and send to the head office.

REPORTING on PAID / UNPAID / PAYMENTS RECEIVED

Reports can be tabled in PAID, UNPAID, and payments received

They can be tabled for use on registration days to assist in identifying whether a member has paid or not

Go to Registration Fees / Transactions / Paid or Unpaid or Payments Received

These reports can be filtered by date / sorted alphabetically

You can additionally report on a combined fee or the fee broken down relevant to the tier.

SETTLEMENT REPORTS

Quick Steps: Go to Subscriptions > Transactions > Settlements

1. Within the Management Console, select **Subscriptions** from the top menu, then **Transactions** from the left menu.
2. Select **Settlements** from the expanded left menu.
3. This will display an overview of your Settlements and the payments made to your organisation.

If you are sitting in a Tier 1 or Tier 2 organisation then payments received by those organisations that sit below you will display under their name here.

4. Click on the hyperlink next to any date to view a PDF report of all transactions from that period and the breakdown of the payments.

Additional Information:

Your Settlement Reports will be updated by the middle of each week for the week period before that. Any payments made into your organisation from membership payments will display on your bank statement with SUBS and the date of the Settlement Period.

These are a great tool for treasurers who wish to match payments that have been paid into the Bank account.