



A COMPREHENSIVE GUIDE TO

Registration

Introduction

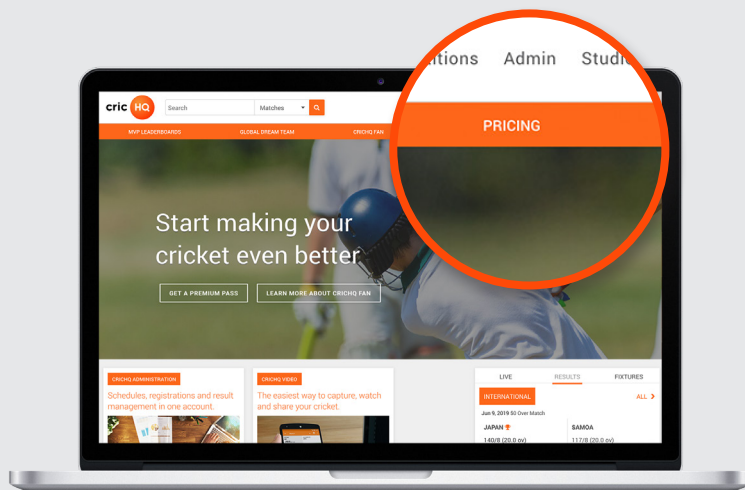
This document lists how to create and manage registrations using the registration tool from a club administrators perspective.

The cricHQ registration platform empowers you to manage your club's memberships. With our tooling, you can: handle new and existing club members, capture and report on a wide range of personal details, and capture and manage subscriptions via internet or physical banking. The registration platform solves the hassle of chasing down unpaid subs and gives you fine-grained control over the data you need to capture from your membership base.

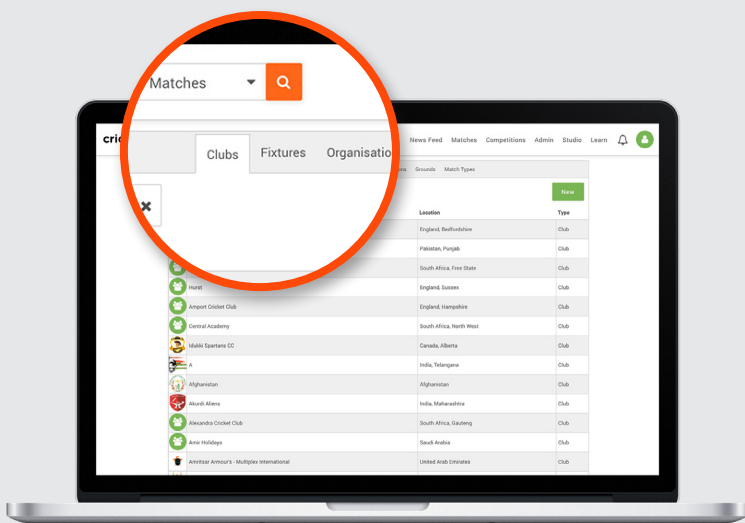
Accessing the Platform

The registration platform can be accessed through your club's **"Players"** tab on cricHQ.com:

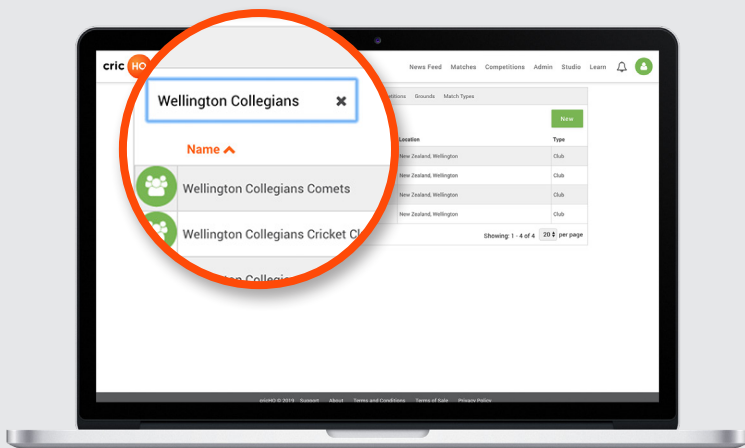
1. Login into the cricHQ website and select the **"Admin"** tab.



2. Select the **"Clubs"** tab and the club you'd like to create registrations for.



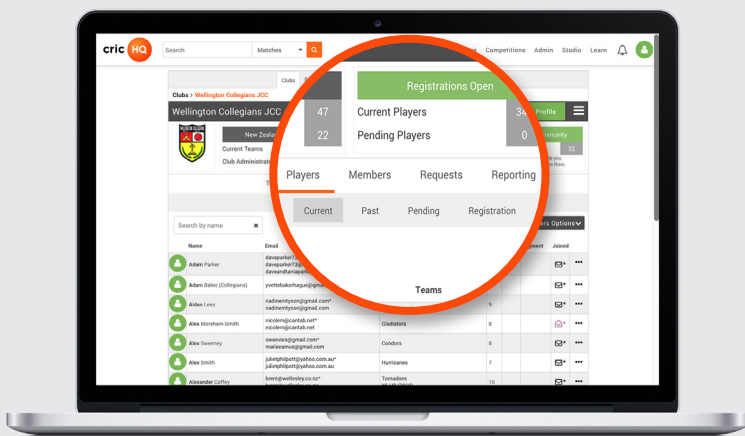
3. If you don't immediately see this, you can use the **"Search"** input to filter for the club you wish to edit.



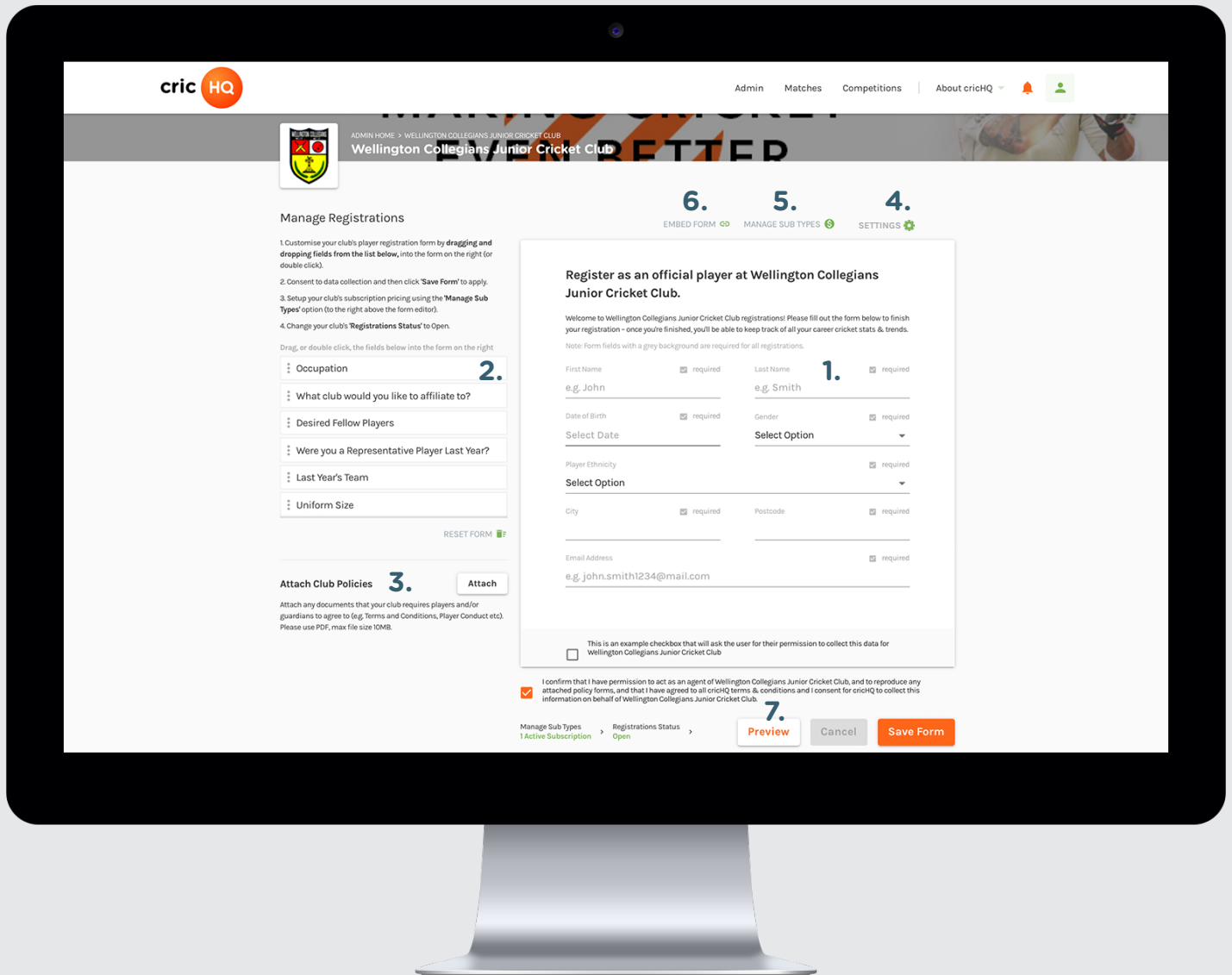
4. Select the **"Players"** tab. The "Players" tab includes:

- All of the members of your club and their responses to your registration form.
- Their subscription statuses (which ones they have subscribed to, and their payment status).
- Players that are archived, and are no longer active members.
- The ability to email players individually, or send a bulk email on behalf of the club.

5. Select the **"Registration"** tab to load the registration form builder.



Building a Form



The registration administration zone consists of:

1. Form Builder
2. Available Fields List
3. Policies Management
4. Settings Drawer
5. Subs Builder
6. Form Embedder
7. Preview Option

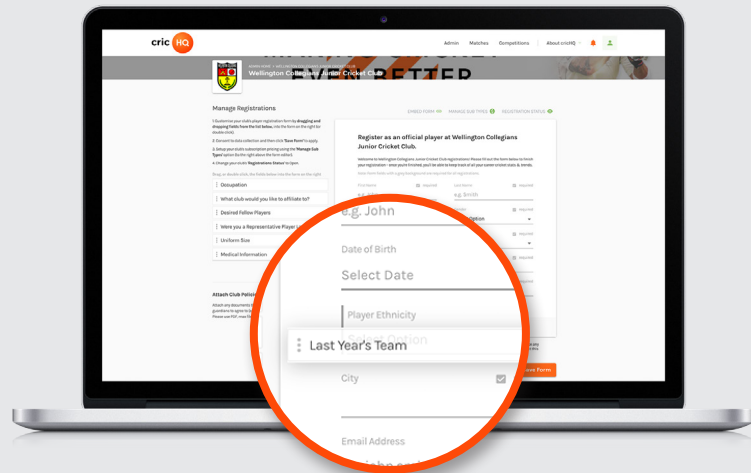
Form Builder

Adding a Field

The primary *Form Builder* allows you to drag and drop *Fields* from the *Available Fields List* into the *Form*.

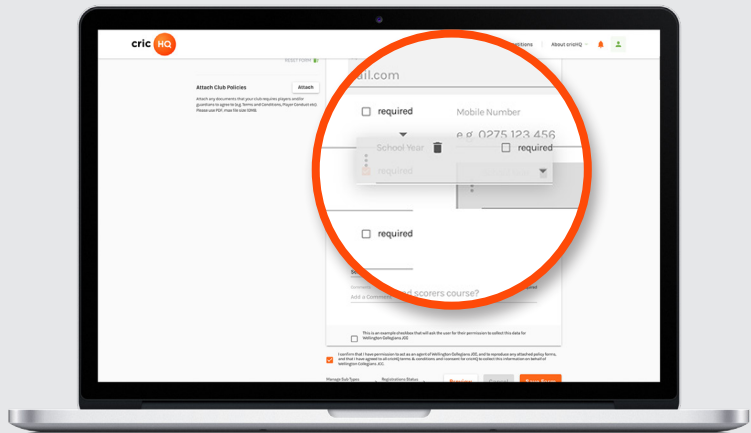
Fields will automatically rearrange themselves to make space for each other.

You can also double click on a *Field* to automatically add it to the bottom of the *Form*.



Reordering Fields

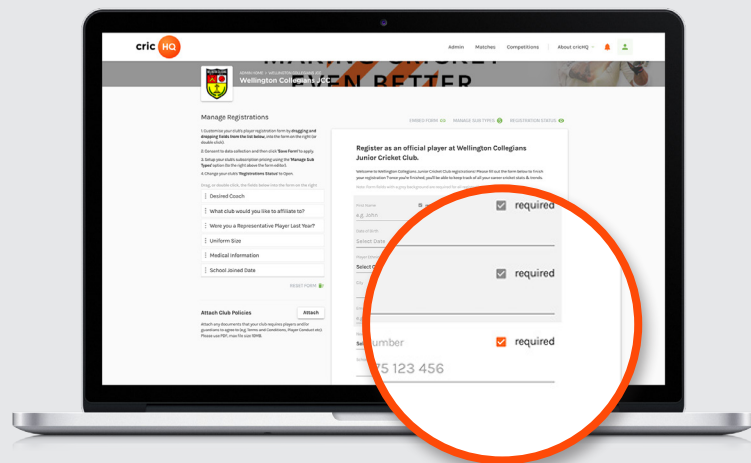
You can use the same drag-and-drop mechanics to reorder the layout of the *Form* by hovering over a *Field* and dragging it into a position you wish it to be in.



Making a Field Mandatory

To make a *Field* mandatory for when users are filling out your *Form*, check the **"Required"** checkbox.

When your members come to filling out the published *Form*, this *Field* will be enforced, and they will not be able to submit their details without filling in this value.

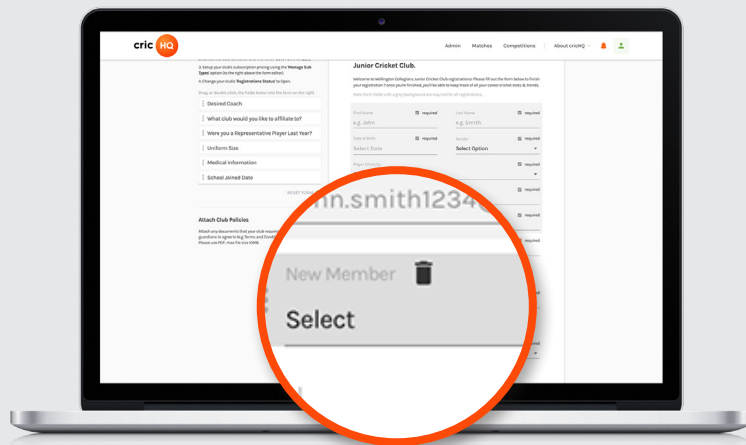


Removing a Field

To delete a *Field*, hover your mouse over the *Field* and a **"Trash"** icon will appear.

Click this icon to remove the *Field* from the *Form* (the removed *Field* will be readded to the *Available Fields List*).

Note, your parent organisation may enforce that certain *Fields* are mandated for their data collection purposes. In this case, those *Fields* cannot be removed from the *Form* (although you can reorder them).

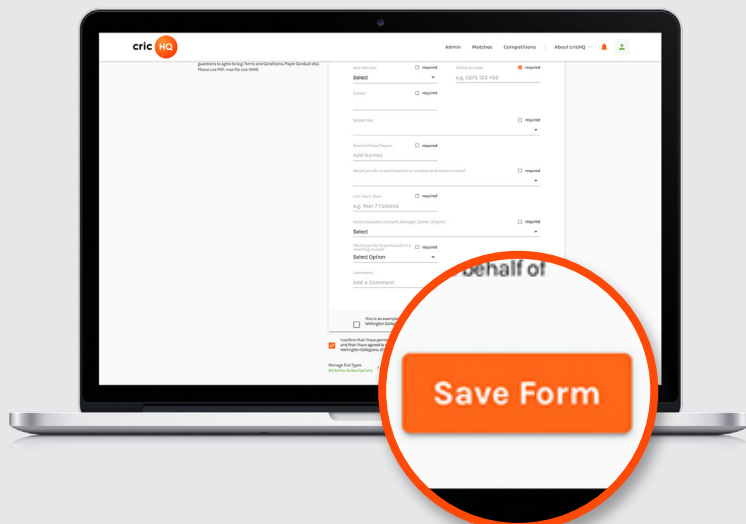


Saving the Form

At any point, you can click the **"Save Form"** button to ensure any changes you make to your *Form* (or subs, policies, etc.) are synchronised with cricHQ's servers. When you click **"Save Form"**, all versions of the *Form* are updated (including those on other machines if you work across multiple devices).

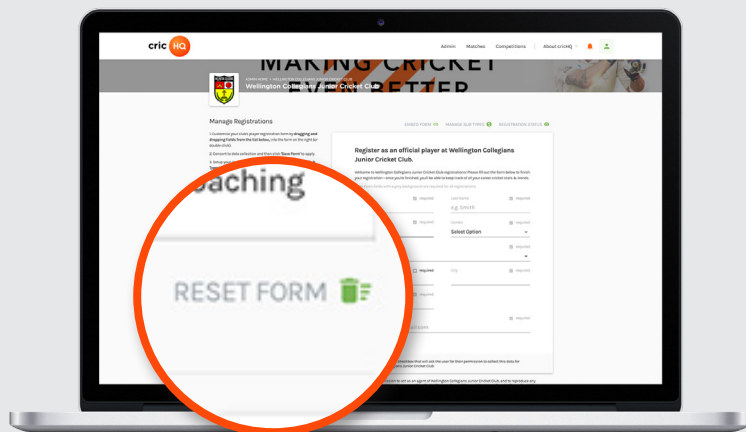
You will need to accept cricHQ's terms of use and confirm that you are authorised to act on behalf of the club by checking the consent checkbox in the *Form* footer.

If your registrations are already open to your memberbase, this new version of the *Form* will be served to them as well, so use wisely if your registrations are already open!



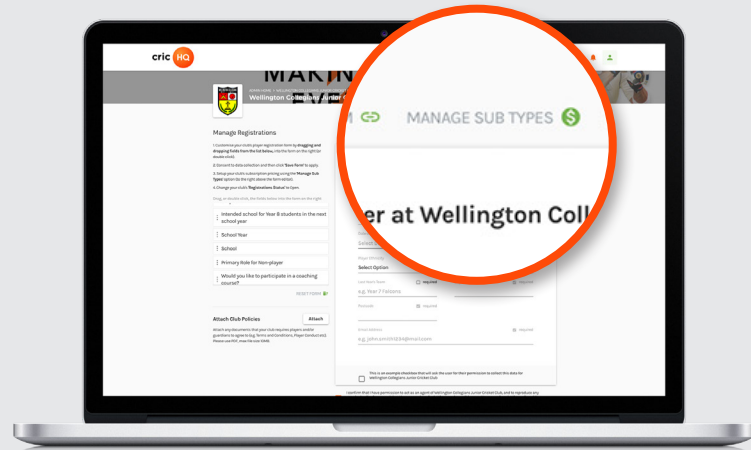
Resetting the Form

If you need to, you can use the **"Reset Form"** button to clear the form back to its original state and start again (please note that this process is irreversible).



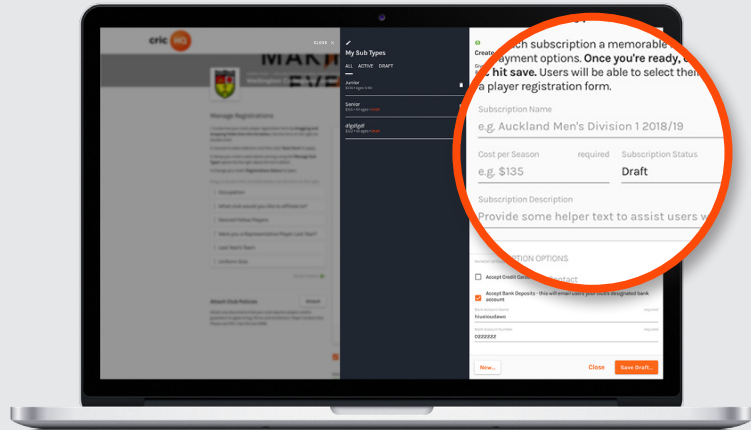
Subs Builder

To manage your club's subs, you can click on the **"Manage Sub Types"** button above the *Form* to reveal the subscriptions drawer. To dismiss this drawer at anytime, click on the **"Close"** button in the bottom footer, or in the top left (or click anywhere in the translucent region).



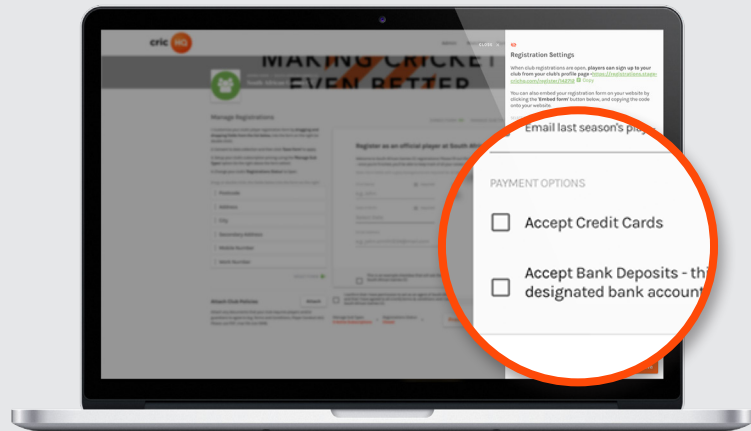
Default Options

Subscriptions require at least a name and a price in the denominated currency. You can also add a brief description text to provide a little helpful hint to users as to what the subscription is for (or who it is for).



Payment Options

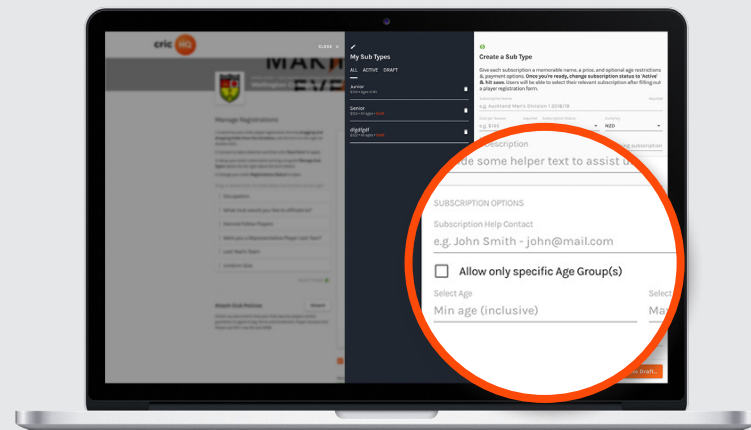
Payment options are not defined per subtype. Rather, to control which payment providers you wish to take (credit card, bank accounts, etc.) you can do this through the Registration Settings drawer.



Advanced Options

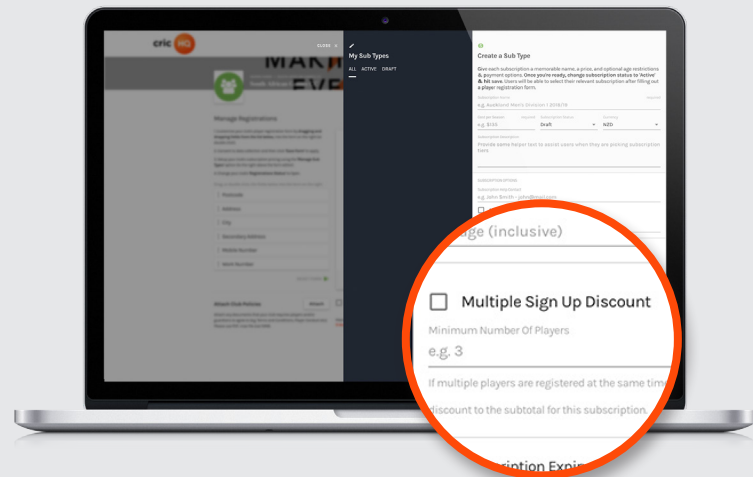
In addition to the default and required options, you can also specify:

1. A **"Help"** contact - a person within the club who can be contacted for help with the subscription
2. An age range restriction on the sub - only those who enter their birth date (where applicable) within the bounds of the age bracket will be able to select this sub type (useful for different level of junior sub types for example).



Multiple Signup Discount

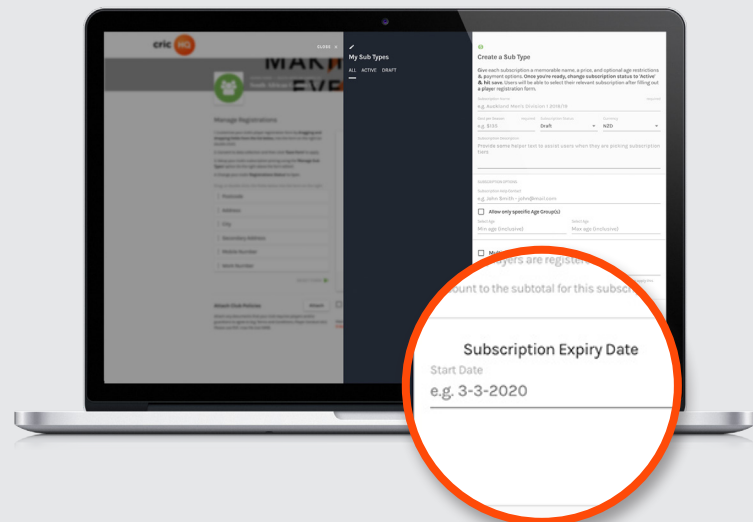
If you wish to offer a signup discount for families or groups, you can opt-in to provide a discount by selecting this option and defining the minimum number of registrants required to trigger, and then specifying the size of the discount to apply to the total.



Subscription Expiry Date

If you wish to provide an early-bird discount/sub-type, or stop accepting a particular sub-type after a certain date, you can specify an **"Expiry"** for a sub-type. After which, registrations can still be accepted for other sub-types, but users will be unable to select this.

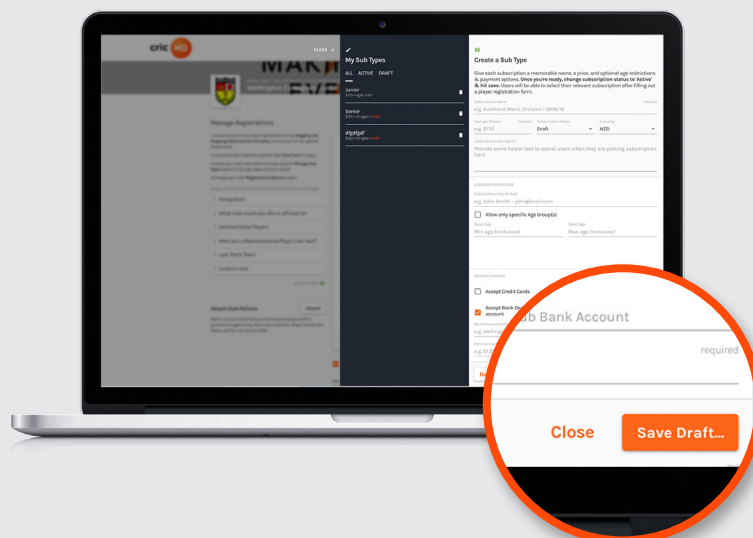
This is only useful if you intend to provide early-bird incentives, or have some reason that a sub cannot be run for the entirety of your registration window, otherwise it is easier to mark your entire registrations as Open or Closed than to define an expiry for every subscription tier you create.



Saving, Editing and Deleting

Once you are happy with your sub type, you can click the **"Save"** button in the footer of the drawer. This will add the sub type to the **"My Sub Types"** sublist to the left, you can edit a sub type by clicking on one of these rows and updating values as required (don't forget to click **"Update"** in the footer when complete!).

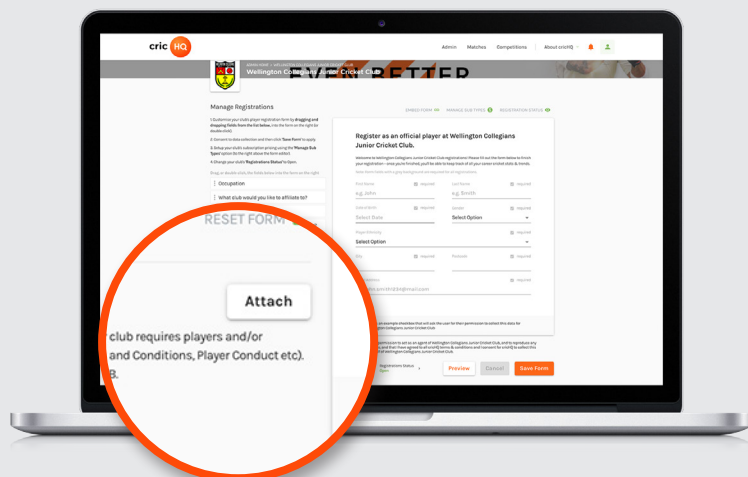
If you wish to delete a sub type altogether, click the trash icon to remove it - note that this process is irreversible.



Club Policies

Every user who signs up through your registration *Form* will also be forced to agree to cricHQ and your parent organisation's terms of use and any other policies. If you have your own policy documents that you require club members to agree to and (digitally) sign for you can add them in the *Attach Club Policies* section.

This will open a file selector on your local computer that you can use to upload PDF files from. The max file size is 10MB. You can remove your policies by clicking the trash icon next to the uploaded file (but you cannot remove cricHQ's or the parent organisation's policies).

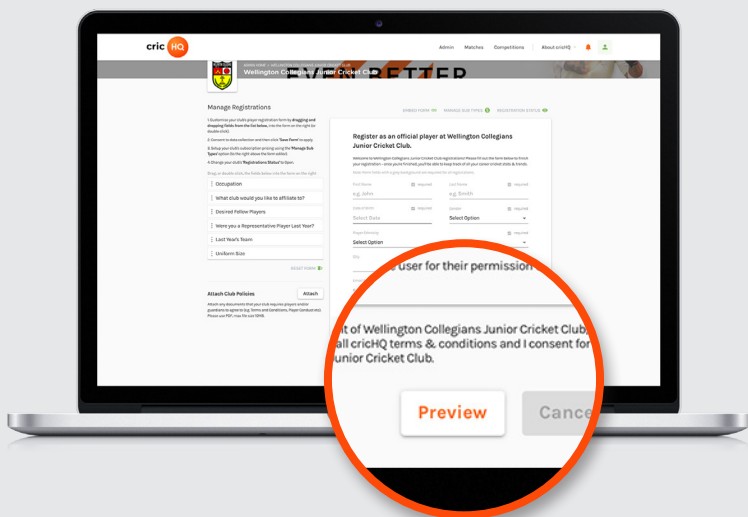


Previewing your Form

At any time, you can click the **"Preview"** button in the *Form Builder's* footer. This will load the form into a *Preview* mode so that you can view it as if you were one of your club's members coming to sign up to your club. The *Form* will only take you to the point of submission, so you are safe to play around with layouts and sub types.

To exit this mode, click the **"Exit to App"** button in the top right of the *Form* input header at any time.

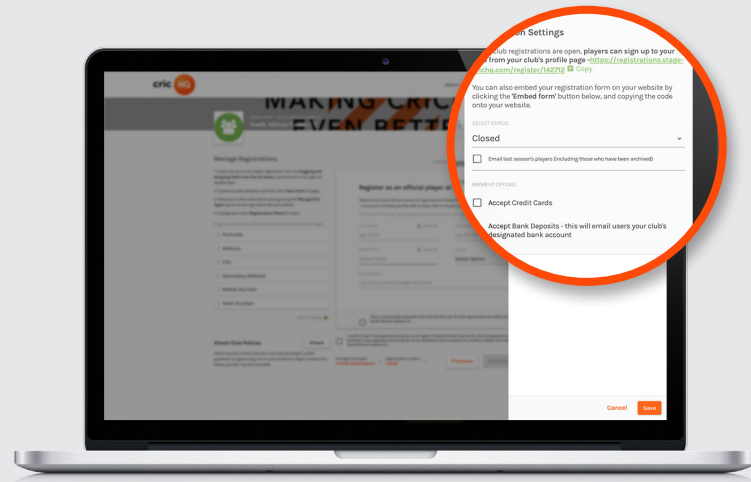
If you get stuck, you can refresh the page to forcefully reload the *Form*.



Registration Settings

Inside the "Registration Settings" drawer, accessed by clicking the "Settings" button above the Form. The drawer is comprised of:

1. "Registration Status" - which is used to toggle the opening of registrations, and;
2. Payment Options - which define payment methods for subscription types and is applied universally.

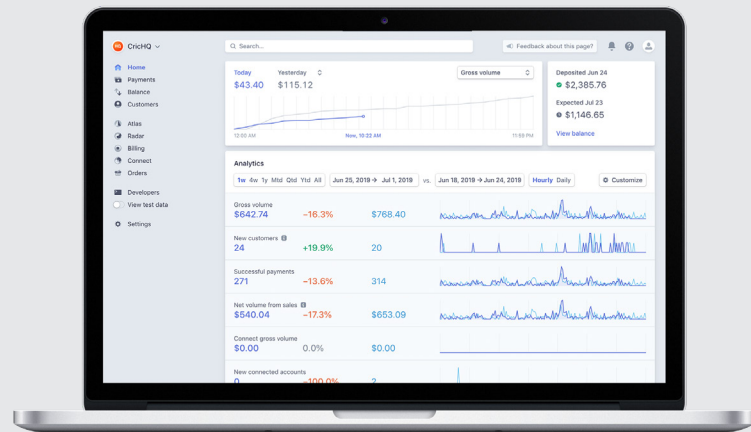


Payment Options

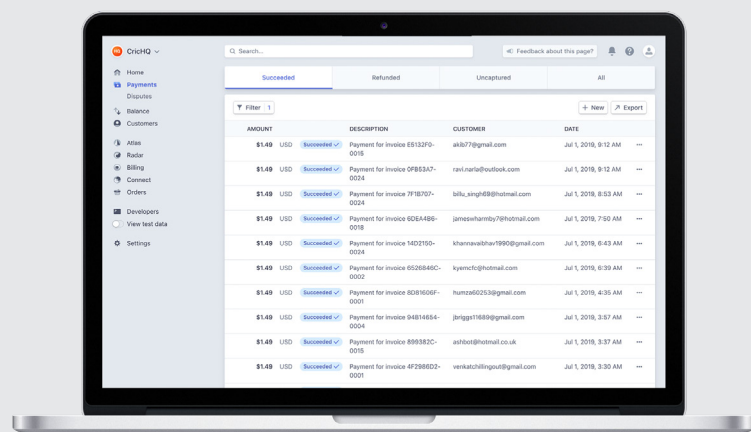
To collect payments for this sub type, you have the option of taking credit/debit cards (from all major providers) through Stripe Connect.

Stripe Connect

Stripe Connect is a third party service which will require you to sign up your club as a business user. Once you have followed their simple signup process, your account will be automatically linked and eligible to collect subs via credit card. Stripe Connect will provide you a fully fledged dashboard for your credit card transactions, allowing you to: track and manage payments, process (partial) refunds, link with popular accounting software providers.



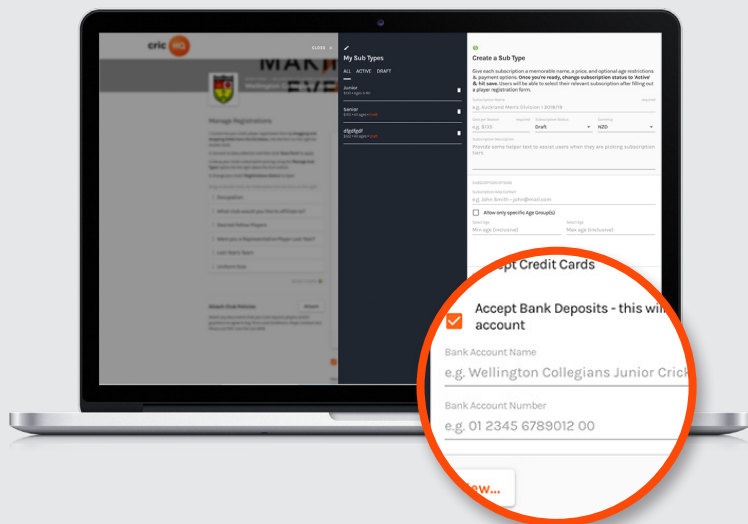
You will have the option within the Subs Builder to elect whether or not you wish to absorb the credit card gateway fees associated with credit card transactions by checking the "Absorb Stripe Fees" checkbox. By default, users will have this charge added to their total at checkout time, but if you want users to pay-what-they-see, then you can choose to absorb this yourself.



For most providers, this fee is calculated as ~3.5% + 30c per transaction, so if you set a sub to be \$100, then the user will be charged \$103.94 at checkout time by default, and you will receive \$100 in your account. Alternatively, if you opt to pay this fee on behalf of the user, they will be charged \$100 at checkout, and you will receive \$96.20 into your account.

Bank Deposits

In addition to credit card gateways, you can provide a local bank account for users to pay into. You need to provide a name for the account, and its local bank account number. cricHQ provides no **"Middle-Manning"** for this service, and so you will need to track payments against this with users in your club admin CRM to ensure payments are indeed made. This is a nice little backup if users do not have the means to pay right now, or with credit/debit card (and there is no cost to you if you wish to use this for all payments to save on gateway fees).



Opening Registrations

Once you are ready to start accepting registrations from your club's members, you can open the **"Registrations Status"** drawer by clicking the **"Registration Status"** button above the *Form*. Make sure you have clicked the **"Save Form"** button in the *Form* footer before doing this.

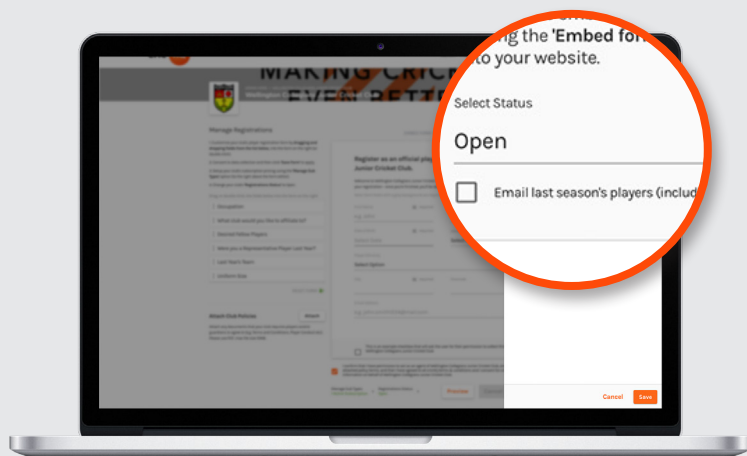
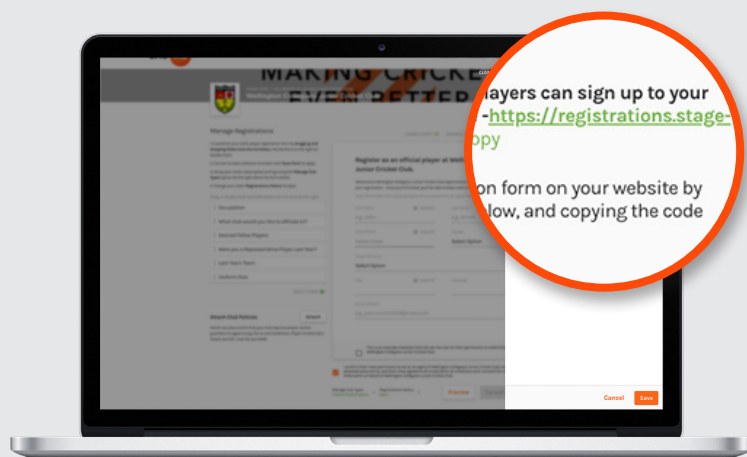
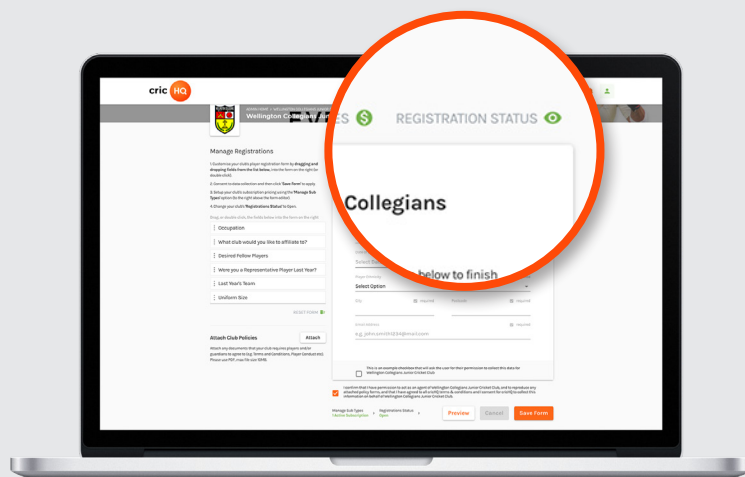
This will provide you a URL for you to send to any members you wish to engage that are outside of the cricHQ platform.

To trigger the opening of your registrations you:

1. Need to make sure you have a valid *Form* with inputs and has been saved
2. Toggle the **"Status"** dropdown from **"Closed"** to **"Open"**
3. Elect whether you want cricHQ to send out an email to your last season's player list by toggling the checkbox
4. Clicking **"Save"** in the drawer's footer

The action of **"Save"** will be the triggering point for the email dispatcher, so make sure that you only click this when you are absolutely sure that you are ready to open and accept registrations.

By toggling the status to **"Closed"**, users will be unable to fill out your *Form*, which may be useful if you find a mistake in your *Form*, or want to stop registrations earlier than you may have been expecting.



Embedding a Form on Your Website (Advanced Users)

If you are able to edit the HTML code on your website, you can embed your registration form directly on your own website and direct users there instead of forcing them through cricHQ's platform.

To do so, open the *Embed Registration Form* drawer by clicking on the **"Embed Form"** button above the *Form*. Copy the source code into your own website and, once your registrations are open for business, you can direct your members to subscribe through there. All the functionality, but especially the payment processors, requires an SSL connections and so you will need to ensure that you have a valid SSL certificate for your website. While the script may work without it, you should not take credit card payments without one.

cricHQ provides this embedding system as-is where-is, we don't recommend using it if you are a little unsure on how your own web platform works.

Handling Registered Players in Your Admin CRM

As members sign up to your club's Form, they will be added to the **"Pending"** tab inside your Admin CRM. cricHQ will make all the best efforts to import their existing cricHQ player profile and stats automatically (without necessarily needing to sign in during the registration process). You can approve their membership and add them to the **Current** members tab when you have reconciled their payments (or you are comfortable to do so).

If someone signs up to the club, and you wish to reject them, please make sure you refund their payment (if the payment comes through *Stripe Connect* you can do so in that interface).

