

## How to for New GotSport Platform

1. Go to [system.gotsport.com](http://system.gotsport.com), Click on User Login in the upper right-hand side.
2. Enter your account email and password, click Log In
  - a. If this is your first-time logging in or you cannot remember your password, click on "Forgot Password", you can then enter your email to have your login credentials sent to you.
3. If your email is not recognized by the system, please reach out to your state administrators to find out which administrator can add you a user account, which should be your Agent of Record.

### **Add a User: Add User to an Organization & Adjust Access Levels**

1. From the Dashboard, click on "Users" on the left-hand side.
2. Click on "+ New"
3. Enter in the user's email address, first and last name (date of birth and zip code are optional). Then click "Search." **Note:** Their email address will be their new username.  
**Note: If a user has multiple roles, each role must have a unique email dedicated to that role.**
4. If the Email/User ID is found in the system: You will get an option to send a "Request Role Approval" for that user who would then send a request to that email address for them to accept that role.
5. If the Email/User ID does not exist: You can fill out the rest of the information for this user.
6. The only Required fields are the User's Email/User ID and a Password for their account. (They will be able to update the password after logging in if they would like to under their Account tab).
7. After the User has been added to the Organization, you can edit their Role and add a "Title" to their account. Click on their Name under the Users Section.
8. From the User's Account page, click on "Edit" to change their title and edit their access levels.
9. You can edit their title, indicate if they are the Primary or Billing Contact for the Organization, and checkoff the Modules that they have access to in your GotSport Admin accounts.

## Locating Required Governing Body Forms

1. To find forms that are required by your governing association, from the Organization Dashboard, click "Affiliations" then click "Available Forms". Then you can "Select" the required form.

## Adding/Creating Document Repository

A document repository acts as a folder, which stores all the signed forms for this type of document. For example, if you had a club waiver, instead of adding it into that one program as a custom question, you can add a document repository for "Club Waiver" and then add that form into all programs. Follow the steps below to set up a document repository.

The two most common forms that would use a document repository would be for a birth certificate upload and a medical release upload.

1. In the Dashboard menu, click the "Forms" dropdown and select "Forms"
2. Click "New" to create a form
3. Build out your form. Make sure to make the form "TYPE" a "Document Repository".
4. Scroll to the bottom and click "Save".

**NOTE: If you are using GotSport for registering players, you can make this form "required" and it will automatically be included within all your programs. Once a player completes the form once, they will not be asked to complete the form again during future program registrations with your club.**

5. Click "Registration Form" at the top of your screen.
6. Click "New Form Element" to add questions to your form.
7. Build out your form element (question), make the "Type" a "File Field" and click "Save". Repeat as necessary.

## Medical Release Document Repository

1. In the Dashboard menu, click the "Forms" dropdown and select "Forms"
2. Click "New" to create a form.
3. Build out your form. Make sure to make the form "TYPE" a "Medical Release".
4. Scroll to the bottom and click "Save".

**NOTE: If you are using GotSport for registering players, you can make this form "required" and it will automatically be included within all your programs. Once a**

**player completes the form once, they will not be asked to complete the form again during future program registrations with your club.**

5. Click "Registration Form" at the top of your screen.
6. Click "New Form Element" to add questions to your form.
7. Build out your form element (question), make the "Type" a "File Field" and click "Save". Repeat as necessary.

**NOTE: that as a club, you would not need to create this form if your state association already requires a medical release form from all users with the player role.**

### **Program Registration: How to Create/Edit a Program**

1. From the Dashboard page, click the "Programs" dropdown and click "Programs List". Click "New Program"

Note: You can copy and edit a previously created program.

2. The top of the page will ask basic information about your program: program name, seasonal year, program dates, age method, website URL, accounting code, and merchant profile.

3. As you scroll down the page, you will have a chance to customize each field:

- ❖ Description: textbox that allows you to input a general description of your program
- ❖ Welcome Message: this is a dialog box that will pop up to users on the program registration screen before they begin the registration process
- ❖ Notification Emails: any email address placed here will receive an email notification when a player registers for the program.
- ❖ Reply to Email: this is the "reply to" email for registrants, leave blank if you do not want an email address registrants can reply to.

4. The dialog boxes below provide you with the option to require basic information from the registrant. It also allows for you to open the registration for up to four different roles, including Player, Coach, Manager, and Referee.

- ❖ Require Handwritten Signature: This will require a handwritten signature acknowledging the user has understood the registration and cannot proceed to the payment without signing.
- ❖ Ask for Parent Information: If you require parental information, you can also require more than one parents information.
- ❖ Allow player to select team: A player can select the team (you will need to create the team's first).

- ❖ Affiliation: The registrant will have the selected Affiliate name attached to their user account automatically when they complete a Program Registration through your Organization.
- ❖ Competitive Level: The registrant will have the selected Competitive Level attached to their user account automatically when they complete the Program Registration through your Organization. This also will determine the Organization's specific Forms that would be available for the User based on the Form's Competitive Level.
- ❖ Example: Your governing body has a form required for Academy level players, when you set the Competitive Level in your Program
- ❖ Setup to Academy the governing body's Academy form will automatically show in the user's Program Registrations
- ❖ Photo Required for: If you want a player photo or not.
- ❖ College Profile Referral: A third party College profile (Default will publish/ None will not show this to the user).
- ❖ Registration Insurance: A third party insurance for parents to ensure the registration (Default will publish/ None will not show this to the user).
- ❖ Payment Terms: Standard payment terms will be present by default, however, you can overwrite the standard text and enter your club's own payment terms, if needed.
- ❖ Agreement Text: this area allows you to enter text the registrant will acknowledge when completing the registration.
- ❖ Printable Agreement Text: This area allows you to enter text the registrant can download and print after the registration.
- ❖ Confirmation Email Text: In this area, you can enter a custom confirmation email the registrant will receive after registration is complete.

5. After you have selected and entered all the information on this program setup page, click "Save" at the bottom to continue.

6. While creating your program registration, click the "Registration Form" tab at the top of your page. To create a new form question, click "+ New Form Element" on the top right-hand side of your screen.

7. There are different types of form elements for data collection or dissemination:

- ❖ Text Input allows you to ask a question where the registrant can type a response.
- ❖ Drop Down List allows for the selection of an element in a drop-down list (example: jersey size, day of the week, etc.);
- ❖ Radio Buttons allow for the selection of one element, like the drop-down list.

- ❖ Check Box is a single check box typical for agreement text (example: check here if you agree to...).
- ❖ Check Boxes allow for the selection of multiple elements (example: check all that apply).
- ❖ HTML is not responsive and allows for you to post a message with HTML editing capabilities.
- ❖ File Field gives you the ability to ask and/or require the registrant to upload a document.

**Note: As you make edits to these form elements, they will change live through the preview on the right-hand side so you will know exactly how this question appears.**

8. Below are a few more examples of some form elements:

- ❖ Label: this is where you would type the question.
- ❖ Available Values: You will type the available options here. Each option needs to be placed on a separate line. Of note, you would do the same for Drop-Down Lists and Radio Buttons.
- ❖ Page: You can separate each form element (question) on different pages during the registration.
- ❖ To the right, you will see a live preview of the form element while you create it. After you have finished, you can make it required and click "Save" to create your next form element.
- ❖ Required: This stops the user from moving on in the registration until the question is completed.
- ❖ Editable: making a form field editable, allows a user a chance to change or upload a form later.

9. When on the list view of your form elements, to order them and move them around, click in the black bar of the question to use the drag and drop function.

### **Creating Fees for your Registrants**

You can create Fees for your registrants under the Registration Fees tab.

1. Click "New Payment Plan"
2. In the new "New Payment Plan" pop out, you will be able to build your payment plan.
  - ❖ Name: Name of the payment plan.
  - ❖ Description: Any Information about the payment plan.
  - ❖ Late Registration Setting:

No Late Registration - No payments will be allowed past the start date of the monthly payment.

- ❖ Preserve Dates/Back Charges - If anybody registers late, the payments they miss will be charged on payment. (i.e. payments should start in August, but they joined in September, the month they missed will be added to September's 1st payments.)
- ❖ Preserve Spaces/Push Dates - If anybody registers late, Monthly payments missed, will be pushed to the end. (i.e. payments should start in August, but they joined in September, the month they missed will be added to the end.)
- ❖ Active: Make the payment plan available to be selected for the Registrant when completing your Program Registration.

3. Click "Save".

### **Customize the Appearance**

1. While creating your program registration, click the "Appearance" tab at the top of your page. From the "Appearance" tab, you can fully customize the appearance of the pages, upload a logo and background image or import an appearance from a previous program. Note: as you edit colors and make changes to your appearance, they will live change on the right-hand side like your registration form.
2. While selecting colors for your appearance, be sure to note the eyedropper tool next to each color as well. This tool will allow you to pull the exact color from a logo you have uploaded, allowing you to keep this appearance as professional as possible in portraying your organization's colors.
3. In your admin account, you have the capability of creating features. These features can be globally created to be accessed for programs, tournaments, leagues, contracts, etc. or just created for one-time use.
4. From your dashboard, select "Features" on the left-hand side.
5. This page will list all features you have created in the past, with the ability to filter through them with the use of the filters at the top of the page.
6. To create a new feature, click "+ New Feature."

From this page, you will be prompted to enter information regarding this feature:

- ❖ Name- The name of the feature.
- ❖ New Category or Category- You can categorize these features. You can either create a new one when adding this feature or selecting an existing category from the drop down.
- ❖ Description- Brief description of this feature.
- ❖ Gender- You can control which gender this feature is applicable to.
- ❖ Age From & Age To- You can control what ages this feature is applicable to.
- ❖ Available After- If this feature is available after a certain number of registrations, you can set that number here (i.e. Family Discounts).
- ❖ Start Date & End Date- You can control the time frame in which this feature is available.
- ❖ Maximum Quantity – This is the number a single user can select on a particular feature. For example, if you only want a user to be
- ❖ able to use it once, you would input “1” in your Maximum Quantity box.
- ❖ Quantity Available- This is the number of total times this feature can be used before it is no longer available. For Example, if you only wanted 100 people to use this, you would type "100" in the Quantity Available box.
- ❖ From this page, you will be prompted to enter information regarding this feature:
- ❖ Amount- This is the amount of money applied to this feature. If you wanted to apply a discount of \$25 off for this feature, then you would put "-25" in this section. If the feature is an added bonus and was for \$25, then you would put "25" in this section.
- ❖ Voucher Code- If you would like a Feature to be available only for a specific user or users and not accessible to all, you can enable this access criteria by implementing a Voucher Code. During the registration process, the Feature will not show as an option on the list unless the Voucher Code is entered.
- ❖ Required- With this box selected, you are requiring this applicant to select the feature.
- ❖ Default Selected- With this box selected, if applicable to the registration, this item will be selected by default.
- ❖ Active - With this box selected, the feature is able to be selected/applied.
- ❖ Global - Checking this box off will make this feature globally accessible as a "Quick Add" feature in any program, tournament, league, contract, etc.

6. Click "Save" at the bottom once completed.

### **Completing Registration**

Once the Program Registration is built and customized to your liking, the last step you'll need to complete is opening the Registration for your Club Members to complete. Follow the steps below to complete it.

1. From the dashboard, scroll down on the left and click on "Programs." Now click "Program List".
2. From the program list, you will see the list of programs you have. Now click on the Program you want to open.
3. From the Program Setup page, scroll down and check "Registration Open" and click "Save" at the bottom.
4. After you open the registration and click save, you can scroll up to view the registration links for the program. If you click the link, it will bring you to the first page of the Program Registration process.
5. When the User completes the Program Registration, you will see the completed Program Registration in your Program Registrations tab. You will be able to download a full list of the Program Registrations to an external .csv file and also be able to pull up individual Registrations.

### **Manually Adding a Player**

The below instructions will demonstrate how to create a player account from within your Club account.

1. From your Dashboard, you can click "Players" or click "Club Management" in the menu bar and then "Players".
2. On the Players Page, click "Add Player" to create a new player account.
3. Before adding a new player user account, you will be asked to search for any existing account under that name and DOB. \*First name, Last name, and DOB are required fields.
4. If there are no matching player user accounts found: You will then finish inputting the player's general information and click "Save" to create the new player user account.
  - a. **Note: All data fields with a star \* next to the field is required. At the bottom of this page, you also can add the Affiliate Name to the Player's account, which is vital to add them to Event Rosters.**
  - b. If a matching player account is found with the first three data fields: You will be able to send the account holder a Role Approval Request to their email address. They will need to accept before they show as an Active member in your Club.
  - c. If you do find a matching player account with the first 3 data field: We do recommend going back and searching for the player account with the remaining 2 optional data fields (Date of Birth and Postal Code). If all 5 data fields match, you will be able to bypass the Role Approval Request and instead automatically add the User to your Club list.

## Upload Multiple Players

1. From your Dashboard, click 'Club Management', then 'Players'
2. Click 'Upload Players'
3. Click on "Download template with only required columns" or "Download Template". A blank template .csv file will download, and you can utilize it to match up your Players information to prepare for the upload. The Instructions table will guide you through the correct format and required data fields needed for the upload.
  - a. **Note: When the information is complete in your template, be sure to save the file as either a .csv or .txt file so it is compatible for the upload. An Excel (.xls), Numbers, or Google Sheet file will not be compatible.**
4. Go to the Import into Club section and fill in the information needed for the upload. You can upload all of the Players with an Affiliation added to their account by opening the "Select Affiliation" dropdown menu and select the desired affiliation. You will be required to include the Competitive Level for each of the Players (the list of available Competitive Levels will populate once the Affiliation is selected for you to include in your player upload file).
  - a. **Note: You can also assign the players to their teams through the upload as well by checking off the Team Upload checkbox. This step is not required to upload your Players. If selected, you would be required to include three additional columns in the upload file. 1) Team Name, 2) Team Age, and 3) Team Gender. For this to work, the team will already need to be created within your club.**
5. Click 'Choose File' to select your file and click the "Open Selected File" button.
6. Once you have uploaded your .csv / .txt file, Click 'Open Selected File'.
7. From here you will match up the Column Headers from your Player Upload file and click the "Import Data". You will receive an email with the results from the upload to determine which accounts were created. **Note: The Columns Headers do not have to be in the order of the Required Columns list from the Instructions table, as long as each of the required columns are matched up then the upload will be completed.**
8. You will now see your newly imported players in your Club Management -> Player's list.

## Verifying Players

1. Go to Club Management -> Players -> click on the name of the specific player that you want to verify.
2. In the popup modal, click on the "Documents" tab for that specific player.
3. You can review the uploaded Document again by clicking the on the file name if needed, to verify the Player at the Organization level you will click the Verify button.

- a. **Note: The system will notate the User that verified the Player and mark a date and timestamp.**
- b. The player will now show as Verified at the Organization level with an orange Verified" tag next to their name.
- c. **Note: The State, League, or Governing Body for the Club will then go through and verify the Player at their level changing the orange "Verified" tag to a green "Verified" tag.**

### **Add/Edit a Player Photo**

1. From the Dashboard, expand the Club Management section and click on Players.
2. Click on the name of the player whose photo you wish to edit.
3. To add a photo or replace your current photo with a new one, click "Choose File"
  - a. To edit a play photo, click the "Edit" button to crop or rotate this image to make it look as clear as possible.
  - b. Once you crop your photo, click "Save"

**\*\* Please Note, if the Edit button is not available for a specific player's photo, it is likely due to that player's photo already being verified by your state association. If you do not see that Edit button available, you should reach out to your club's governing body directly.**

### **Manually Adding a Coach or Manager to a Club**

1. From the Dashboard page, click on "Coaches" tile (if you have the Default Dashboard layout) or click the Club Management section and select "Coaches" from the drop-down list.
2. From the Coaches overview page, click "Add Coach"
3. Enter the Coach's Email/User ID, First Name, and Last Name (Note: This is the only required information) and click "Search".
  - a. This will search the system to alert you if a matching coach already exists. Additionally, if you match all five of the data fields listed with an existing User account you will be able to bypass the Role Approval Request and automatically add the User to your Club list.
4. If there is not a Coach with matching information for those three data fields, you will be prompted to enter the information to create a new user and click "Save" at the bottom of the page.
5. The coach will now appear under the Coaches overview page.

## Add Affiliate and/or Competitive Level to Coach

1. If you need to add the Affiliate and/or Competitive Level to an Individual Coach account, click on their Name to go to their Profile and click "Edit".
2. From the Edit page, you will select the Affiliate Name and/or Competitive Level for what you want to adjust. Be sure to Save your changes when you've completed making the changes.
  - a. You can also edit the User's Competitive Levels in bulk from the List Overview page. You will enable the checkbox next to the Users that you need to adjust and click the "Bulk Update Competitive Level" to adjust levels in bulk. Make sure to Click Save.

## Uploading Coach/Manager

1. From your Dashboard, click 'Club Management', then 'Coaches'
2. Click 'Upload Coaches'.
3. Click on 'Download Template' A template will show up for you with several fields. Make sure you have the REQUIRED fields filled out in your upload. The REQUIRED fields are FIRST NAME, LAST NAME and EMAIL.
4. Once the Upload File has been formatted with the Coach information, go to the Import section and click 'Choose File' to select your file. Once you have uploaded your .csv / .txt file, Click 'Open Selected File'.
  - a. **Note: You have the option to upload the Coaches with an Affiliation attached to their account. When you select the Affiliation, you will be required to include the Competitive Level for each of the Coaches. The list of available Competitive Levels will populate once the Affiliation is selected for you to include in your Upload File.**
  - b. Once you have uploaded your .csv / .txt file, Click 'Open Selected File'.
5. From here you will match up the Column Headers from your upload file and click Import Data. You will receive an email with the results from the upload to determine which accounts were created.
  - a. **Note: If the column headers do not match when uploading your file, you will be able to update them accordingly before the step below. You can select (do not import) if you don't have the data for a specific field.**
6. You will now see your newly imported coaches in your Club Coaches list.
7. If you need to add an additional role (Affiliate) to the User's profile you can do so by clicking on their Name. From within their User Profile, you'll fill out the Add Role table with the additional Affiliate/Competitive Level that you want to add and click Save.
8. The additional role will show in Coaches list.

- a. **Note: If uploading a list of your Managers to your account, you will follow the exact same steps as noted previously for the Coaches. The only difference is that you will go to Club Management -> Managers -> Upload Managers.**

### **Creating Team Accounts**

1. From your Dashboard, select "Club Management", followed by "Teams"
2. From here click "New Team" button on the right. A new screen will appear.
  - a. Here you will fill out the basic information and select "Save". Your Team Account is now created.
3. To Lock Roster functions for Coaches/Managers: Find the team in your teams list, enable the checkbox to the left of the team. Then select "Bulk Update Team Roster Locks"
  - a. **\*\*The Red Circle on the right is showing you there is no "lock" icon since the team is not locked yet.**
4. Here you will click "Lock Roster Edit" and hit "Save".
5. Once this is done you will now see the Lock Icon to the right of the Team Name.

### **Registering a Team to an Event**

1. Click "Club Management" and then "Teams" from the drop-down menu.
2. From the team overview, click the "Registration" tab at the top of the page.
  - a. From this page, you will see a list of open events your organization and your parent organization are associated with. Once you have found your event, you will see you have three options on the right-hand side.
3. Click "Register", then select the applicable Payment Plan for the Team(s) you are wanting to register.
  - a. On this page, you can select multiple teams, by marking the box to the left of the teams or "Select All" (All teams will be selected when you "Select All").
4. Now that the teams are selected, we will click on the blue "Register" button where a drop down will appear. Here you will select "All Teams" or "Selected Teams".
  - a. Once this is done you will be brought back to your Team Registrations list in your account.
5. Application Form: This option will be selected when the event requires an application to be filled out for the event with data fields required to be filled out.
  - a. Once selecting the Application form, you will have the option to select any of your teams to register or register a new team.

### **Add a Player to an Event Roster**

1. From the Dashboard, select "Club Management" followed by "Roster Builder".
2. Here you will Select the Event you are going to build your Roster for and hit Submit.
3. Once here, you will click and drag the hairpin icon next to the player's name, to the team you would like to roster them on.
  - a. **Note: All the players on the team currently have green checkmarks that signify approved by the event.**
4. You will now see that player on the team with a Yellow Triangle next to the name since the player was just added and has not been approved yet.

### **Add a Coach or Manager to an Event Roster**

1. From the Dashboard, select "Roster Builder".
2. Here you will select the Event you are going to build your Roster for and hit submit.
3. Once you get to the Roster Builder page select the "Coaches" Tab.
4. Here you will click and drag the Coach to the desired team on the right.
5. A pop up will appear asking for the "Position". Select the position and click "Add Coach".
6. The Coach will now appear on the Team Account.
  - a. **Note: All the Coaches currently have Yellow Triangles by their names since they are not approved by the event yet. They will change to Green Check Marks once the event has approved them.**

### **Adding a Club Pass Player to an Event Roster**

1. From the Dashboard select, "Club Management", followed by "Roster Builder".
2. Next you will select the event from the drop-down and hit "Submit".
3. Here you will now see a "Primary" and "Club Pass" Player Pool.
  - a. **NOTE: For a player to show up in your CP player pool, they must be approved as Primary on an existing roster within your club in an event managed by your official registration organization. Roster rules, such as age and roster size will still apply to the addition of CP players. Select "Club Pass" tab and you will now see your available Club Pass Players.**
4. Once here, you will Drag and Drop the "Crosshairs" to the left of the player to the team on the right.
5. A pop-up window will appear that gives you the option to add the
6. position and jersey number. Once complete Select "Add Player".
7. You will now see that player on the team with "CP" as their status.

8. Side Note: If the player is already rostered on another team in this event and is "approved" they will automatically appear as approved for this team as a "CP" player. this can be verified by the green check next to their name.

### **Generating & Approving Official Roster Documents**

1. To do this, you will go to the Scheduling tab, Events, and click into the specific Event you want to enable this setting for.
2. After going to the specific Event, you will go to the "Access & Options" tab at the top of the Event page and under the Associated Club Roster Permissions table enable "Automatically approve compliant roster changes". Be sure to scroll to the bottom of the page and click Save to enable your changes.
3. Once this has been enabled, your Clubs will be able to have their roster additions automatically approved. The Clubs will also be able to run a check against any previous additions that were already on their Event Roster before allowing the automatic approvals. Under their Roster Builder section for the specific Event, they will click the green checkmark noted below to have the check go through against your Roster Rules.

### **Creating A Signature**

1. From your Dashboard, on the left side vertical menu click "Users" and then the "Signatures" tab at the top of the page.
2. Click the "+ New Signature" option on the right side of the page.
3. Complete the "Upload Signature" option by enabling the checkbox, upload your scanned signature, and click Save. Your signature scanned signature will show in the list of Signatures that you can attach to different areas of your account via emails, forms, etc.

Below is the link for the Registrar Manual, the Registrar Manual is also on the FYSA website.

[https://www.fysa.com/assets/56/6/01.gotsport-registrar-manual\[3\].pdf](https://www.fysa.com/assets/56/6/01.gotsport-registrar-manual[3].pdf)