Quick Reference Guide: Signup Form Management

Signup Forms are what Associations and Clubs use to sell their products and process registrations online.

Once you have created all the products then create a **Signup Form**.

NOTE: Each year you **do not** need to create **new Signup Form** for that year, you can just rename the form that was used the previous year.
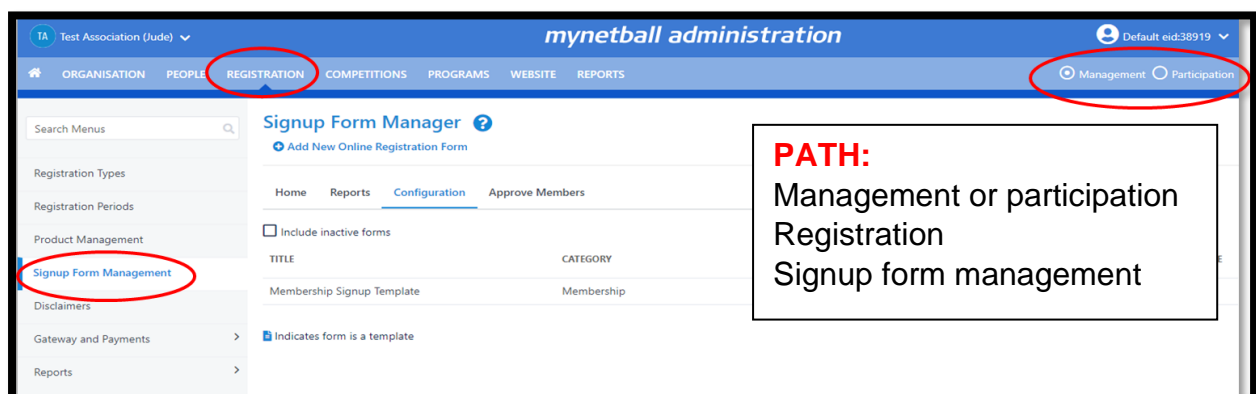i.e. for 2019 you can rename the form that you used in 2018, rather than creating a new one.

Netball Queensland recommend that any **Signup Forms** not being used are set as **inactive**.

The process below is the same whether you are an Association or Club. Associations complete this in either mode, Management or Participation, while Clubs complete it in Participation Mode.

Associations can manage their signup forms under **Management** or **Participation**.

Clubs will not have the option to choose between management or participation, they will just be in participation.
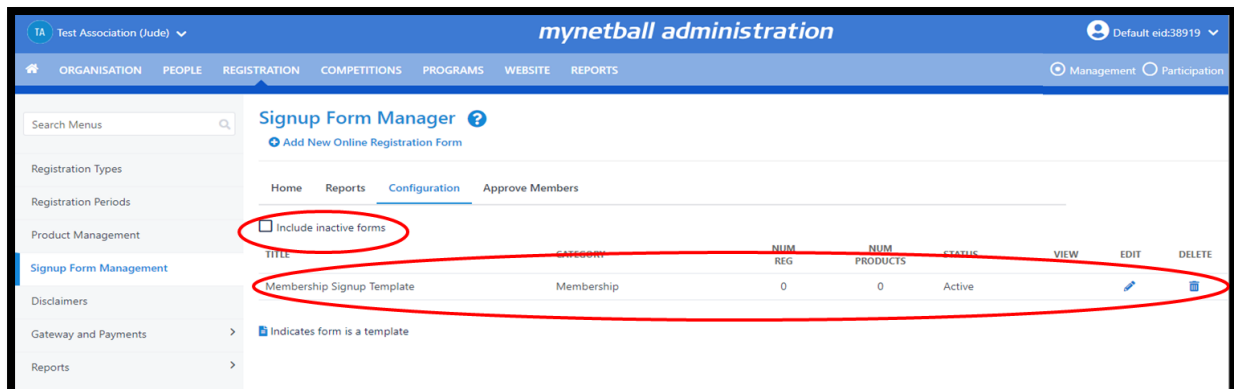

PATH:
Management or participation
Registration
Signup form management

This will bring you to the **Signup Form Manager** page.

Here you can see any active forms that the organisation currently has.

You can also click on **Include Inactive Forms** to see any forms you have that are currently inactive.
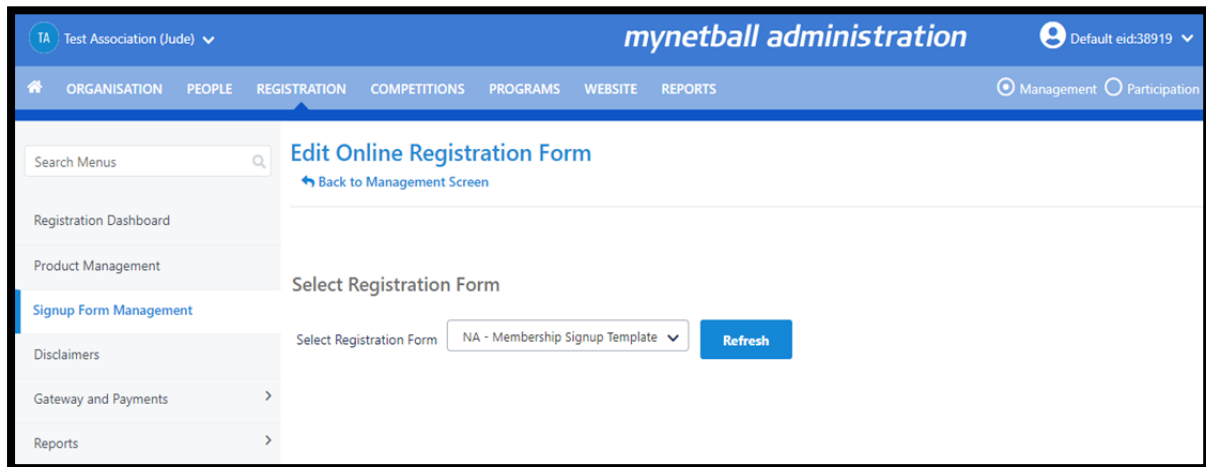

If this is the first time you are creating a form, or you are creating a new form, then click on **Add New Online Registration Form**.
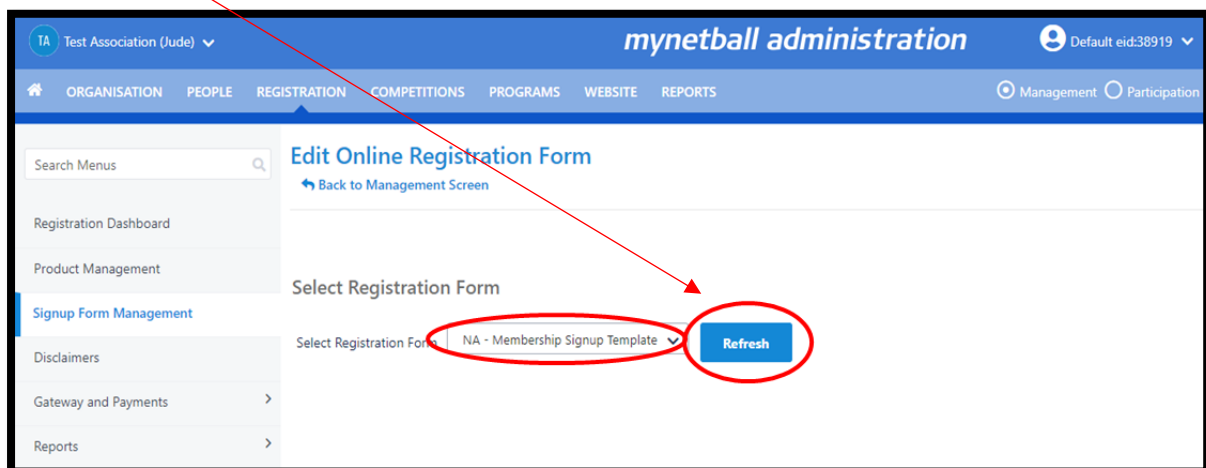
If you are editing an existing form, then click on the click on the ✏️ **Edit** symbol next to the form that needs to be updated.
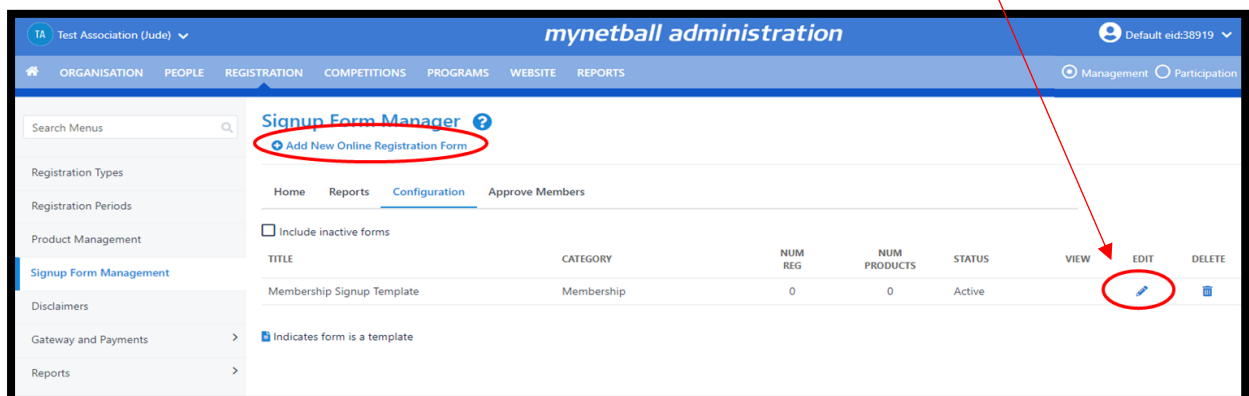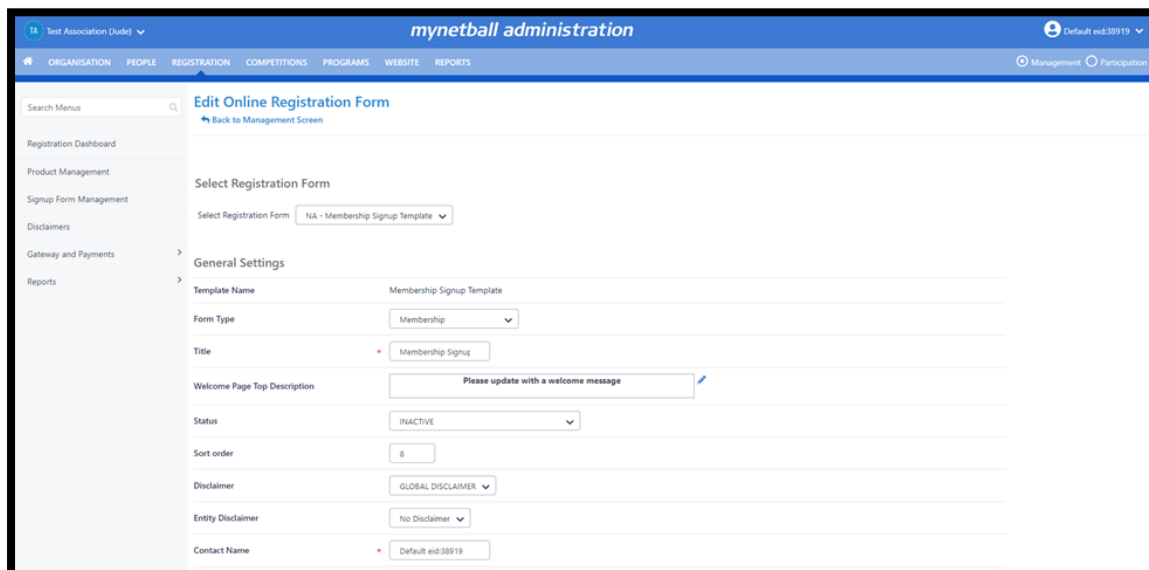

If you are creating a completely new form, you will go to the **Edit Online Registration Form** page.

Select the **NA – Membership Signup Template** from the drop-down list and hit **Refresh**.

This will populate the **Online Registration Form** page.

If you were editing an existing form, rather than clicking on **Add New Online Registration Form**, this is where you would be taken when you clicked **Edit**.

General Settings

Template Name	Membership Signup Template
Form Type	Membership
Title	* Membership Signup
Welcome Page Top Description	Please update with a welcome message
Status	INACTIVE
Sort order	8
Disclaimer	GLOBAL DISCLAIMER
Entity Disclaimer	No Disclaimer
Contact Name	* Default eid:38919
Contact Email	* amanda.kappa@ne

*NOTE: The following when updating the details of an organisation * denotes mandatory field:*

- **General Settings**
  - **Template Name** - you cannot edit this
  - **Form Type -** this determines the overall purpose of the form. It is automatically populated when you select the template
  - **Title*** - this displays at the top of the signup form. Name the form as you chose however Netball Queensland recommend that you put the relevant year at the start of the title

i.e. 2018 Test Association Registration Form

Clearly identifying the form will also help members to establish with form they should be using when they are doing reporting.

  - **Welcome Page Top Description -** this will display at the top of the welcome page. Add whatever welcome message the organisation wants to have displayed at the top of the signup form. Any information that you want your members need to know before they purchase products should be entered
  - **Status -** set the status for your form

Active - the form is publicly available and can be accessed via the Public Access URLs or via the club finder in the public portal or on the MyNetball App.

Inactive - the form is not publicly available and can only be previewed with the provided links.

  - **Sort Order -** the order in which the **Signup Form** will display on the finder club website. This seems to default to 8
  - **Disclaimer -** global Disclaimer (from Netball Australia). **This cannot be edited**
  - **Entity Disclaimers –** the organisation can add any custom disclaimers that has been created. Only one can be added to a **Signup Form** at one time, select one from the drop-down list
  - **Contact Name*** **-** the IT User that is logged in when setting up the form will automatically have their details entered into these fields. Make sure you update this season to season, so participants are contacting the correct people
  - **Contact Email*** **-** see above. Recommend generic email address

- **Payment Settings**

<mark>**Payment Gateway*.** Netball Queensland would recommend that the organisation selects the **MPS DISBURSEMENT GATEWAY [NA]*.**</mark>

DO NOT select this if you have not previously entered your bank details into MyNetball.

It is very important that you do not select this option if you are not sure your bank details are entered and correct as it has flow on affects for other organisations.

- **Allow Offline Payment -** make sure that allow offline payment is unticked so that you do not have offline payments

Netball Queensland strongly recommend that you do not allow offline payments as you will need to manually reconcile this with your registration accounts.

If you really need to have offline payments, then we would recommend that your setup a separate form for this and only make it active when it is needed or assist members over the phone or in person to minimise the exposure to the offline payment option.

- o **Allow Part Payment -** ticking this allows you to offer part payment plans to participant. Part payments is an optional feature for an Association or Club to choose to activate when setting up their sign-up form

Before selecting this option, Netball Queensland encourage you to read through the Quick Reference Guide: Part Payments and make sure you understand the implications this has for the organisation.

- o **Automatically Add Processing Fee -** select **Apply to online payments** and enter the **Variable Charge** of **1.78%*** and **Fixed Charge** as **$0.31** to cover any processing fee costs incurred

Automatically add processing fee	☑ Apply to online payments ☐ Apply to offline payments
	Fixed Charge: AUD 0.31 plus Variable Charge: 1.78 % of transaction amount

This is the processing fee recommended by Netball Australia and PinPayments and it is the minimum amount required to cover the transaction.

- o **Offline Payment Description -** if you are taking offline payments, enter details of how the organisation wants to receive the money here
- o **Currency Format -** leave as is
- o **Tax Description -** leave as is
- o **Tax Rate -** take out if the organisation is not registered for GST

- • **Form Fields**
  - o **Personal Fields**

Personal Fields

Personal fields are fixed in the order they appear on the form. Some fields (which are disabled) must appear on all forms.

*If selected, Parent/Guardian fields will only display on the form if the person being registered is under 18. The fields are in a fixed order - First Name, Last Name, Email, Mobile, Address.

Select Field	Mand. Field
☐ Title	☐
🔒 ☑ First Name	☑
☐ Middle Name	☐
🔒 ☑ Last Name	☑
🔒 ☑ Gender	☑
🔒 ☑ Date of Birth	☑
🔒 ☑ Email Address	☑
🔒 ☑ Home Phone	☐
🔒 ☑ Mobile Phone	☑
🔒 ☑ Address	☑
☐ School	☐
🔒 ☑ Next of Kin / Emergency Contact - Name	☐
🔒 ☑ Next of Kin / Emergency Contact - Number	☐
🔒 ☑ Parent/Guardian fields*	☑

There are several personal fields that are automatically set up in the membership form. **These cannot be changed, they are mandatory**. These are fixed in the order they appear on the form.

These fields for the basis of a participant's MyNetball profile so, as long as they are logging into their account (not creating a new one), the answers will be pre-populated.

o **Other Fields**

Other Fields

Available Fields

Custom Fields [NA]
3rd language spoken
Ambulance Member
Date of Expiry
Do you play netball at school
Have you participated in NSG this year?
How did you find out about NSG
If other please let us know
Medicare Number
NMAS ID
NMAS Internal ID
NSG T-Shirt Size
Private Health Insurance Company
Private Health Insurance Member Number
Registration Type [INACTIVE FIELD]
Which State do you hold a WWCC

Selected Fields

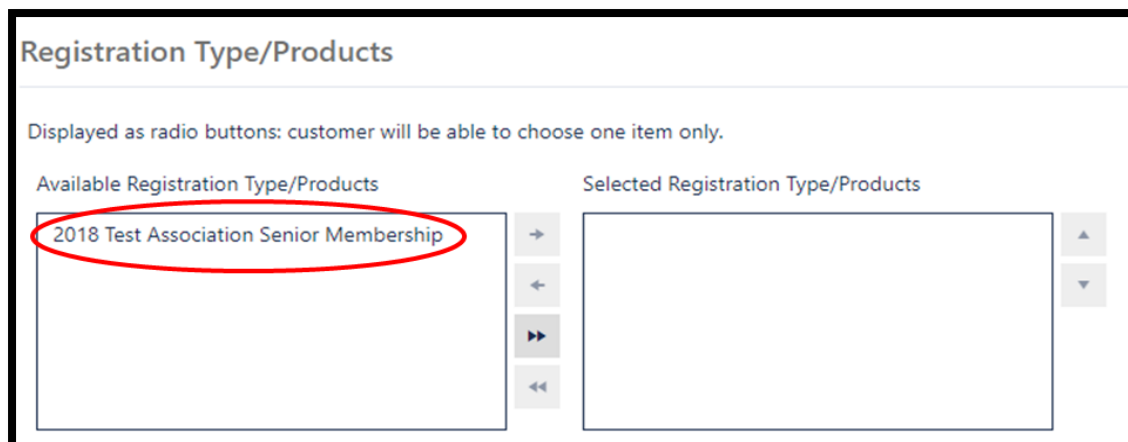| Field	Mand. Field	Display Name	Group Name
🔒 Do you identify as Aboriginal and/or Torres Strait Islander?	☑		This information keeps N
🔒 In which country were you born?	☑		This information keeps N
🔒 Are there any languages other than English spoken at home?	☑		This information keeps N
If Yes, then what other languages are spoken?	☐		This information keeps N
🔒 Do you have a disability?	☑		This information keeps N
Preferred NSG Pack Delivery Location	☐		Other
🔒 Existing Medical Conditions / Injuries /	☐		Medical Information

Again, there is several fields that are automatically set up in the membership form. **These cannot be changed, they are mandatory.**

You can add additional questions to signup forms, from the **Available Fields** box. These questions are ones created by the Association or Club. Additional questions are created through **Custom Fields**.

To add a field to your form, just double click on it so it is in the **Selected Fields** boxes.
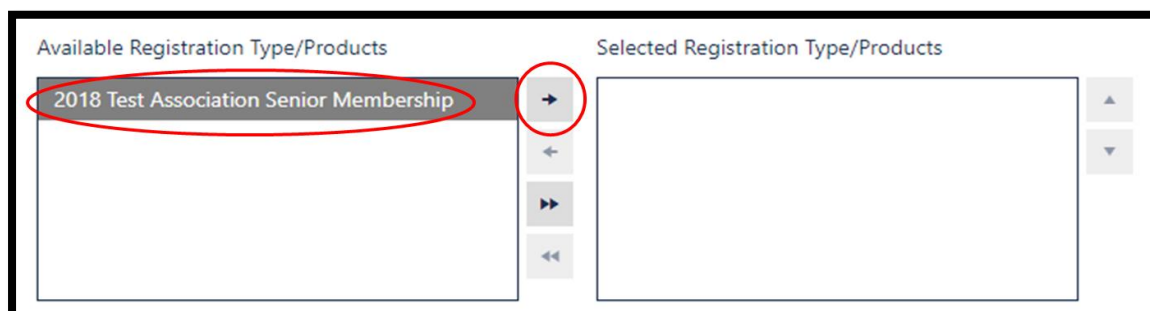
Select which fields the organisation wants mandatory so that the participant must provide a response. If it is in the **Selected Fields** box, then it will appear on the form(s). See **Quick Reference Guide: Custom Fields Management** on how to create new questions.

- o **Registration Type/Products -** this is where the registration products the organisation created (with the Membership category) should appear

Products on the left side **Will Not** appear on the form, products on the right side **Will** appear on the form.

Select the product(s) the organisation needs to appear on the form and move them to the right side – either by clicking the button (as indicated below) or by double clicking on the product.

All products that the organisation needs to appear on the signup form should be on the right side.

- **Saleable Items -** any products that the organisation had created as saleable items would appear in the box on the left side. i.e. Hoodie
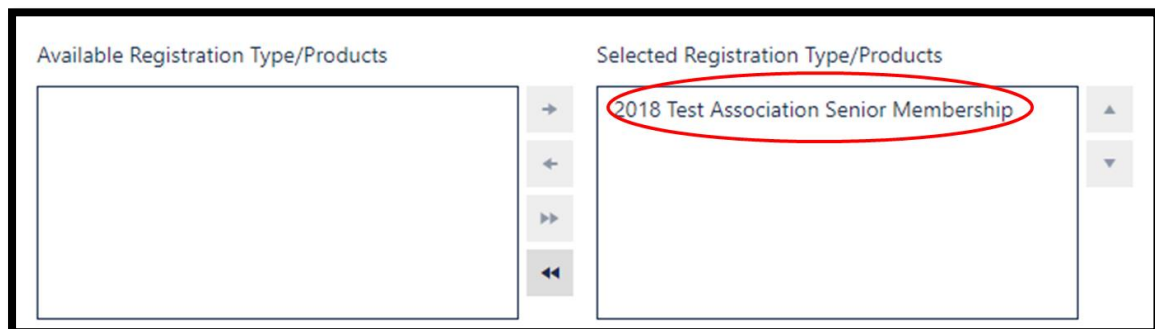

Products on the left side **Will Not** appear on the form, products on the right side **Will** appear on the form.

Select the product(s) the organisation needs to appear on the form and move them to the right side – either by clicking the button (as indicated above) or by double clicking on the product.
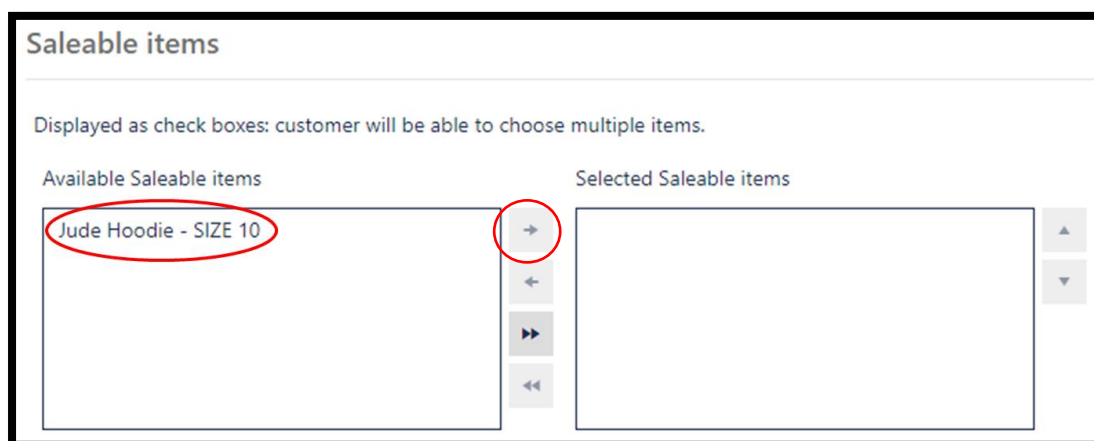
All products that the organisation needs to appear on the signup form should be on the right side.

- **Advanced Settings**

Advanced Settings

Behaviour Options

☐ Manually approve all new registrants
☑ Create logins for new registrants
☑ Omit pay by credit card information from offline payment form
☐ Display payment split information if possible
☐ Allow signups on behalf of family members
☐ Allow no team preference

Syndication Options

☐ Syndicate to Entity Teams
☐ Syndicate to affiliated CLUBS
☐ Syndicate to affiliated ASSOCIATIONS
☐ Syndicate to affiliated ZONES
☐ Syndicate to affiliated REGIONS
☐ Syndicate to affiliated STATES
☐ Syndicate only to direct affiliates

Save

- **Behaviour Options -** leave **Create logins for new registrants** and **Omit pay by credit card information from Offline payment form** as ticked (they will automatically be ticked)

The other options do not need to be ticked.

- **Manually approve all new registrants -** players that did not exist in the database prior to registering will need to be manually approved in order to activate their records

This will not stop someone registering to the organisation. It will only prevent their record (if they are new to the organisation) from being able to be edited, or found in the database

- **Display payment split information if possible -** includes a breakdown of the distribution of the payment within the organisation hierarchy in the registration detail section of a participant's record
- **Allow sign ups on behalf of family members -** this activates family discount options for participants that have logged in to register
- **Allow no team preference -** when signing up for a team, players can choose to not select an existing team. Players that choose to do this will need to be assigned to a team by administrators
- **Syndication Options -** before selecting any of these please carefully consider each option

- o **Syndicate to Entity Teams -** when registering, participants will be able to select an entity team. i.e. any entity team that is affiliated with the organisation will appear in a drop-down list on your form
- o **Syndicate to affiliated CLUBS -** when registering, participants will be able to select from a list of affiliated clubs. i.e. any club that is affiliated with you will appear in a drop-down list on your form.

**This is not required if signup forms are created at Club level.**

- o **Syndicate to affiliated ASSOCATIONS -** when registering, participants will be able to select from a list of affiliated associations
- o **Syndicate to affiliated ZONES -** when registering, participants will be able to select from a list of affiliated zones
- o **Syndicate to affiliated REGIONS -** when registering, participants will be able to select from a list of affiliated regions
- o **Syndicate to affiliated STATES -** when registering, participants will be able to select from a list of affiliated states
- o **Syndicate only to direct affiliates -** only organisations with a direct connection to your organisation (i.e. Parent / Child) will be displayed

NOTE: You **do not need** to select any of these options. Not selecting any of these will not mean that your form will not work, it will just mean that the person registering will just register to your organisation.
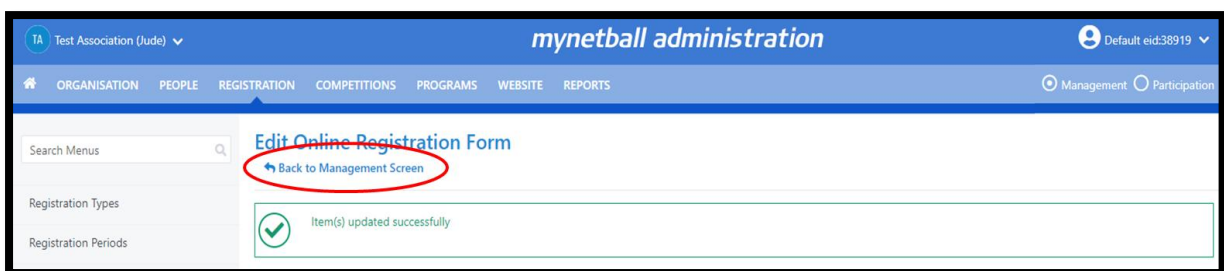

Click **SAVE**

When the form submits successfully a green tick will appear at the top of the page.
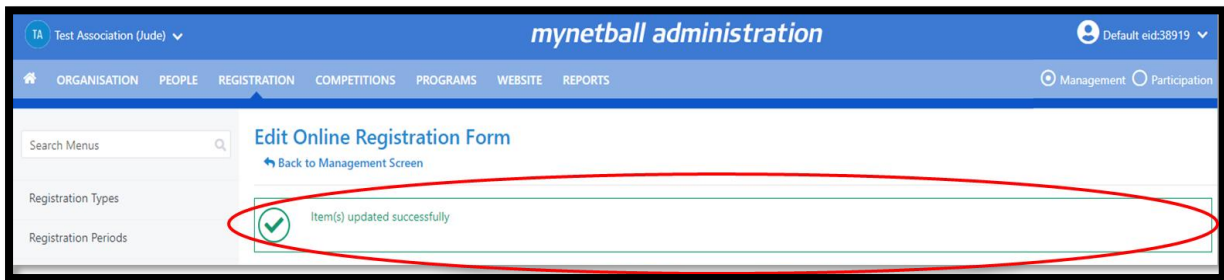
You can click **Back to Management Screen** to go back to the signup form list.

This will bring you back to the **Signup Form Manager** page where you will see the organisations active signup form(s).