



## SportzSoft Solutions

# OLA Governing Body (Insurance) Fee Transfers Guide

This guide has been developed to assist the OLA office with the administration and review of Governing Body Fee transfers (aka Insurance fee transfers) from club Peloton accounts to the OLA Peloton account.

## Setup

Governing Body Fees are setup as 'Governing Body Products' in the OLA account. Some examples of the types of fees we have setup in the past include:

- Over 18 Box Fees
- Under 18 Box Fees

These fees are defined by season and can be further constrained to:

- Birth Date (age)
- Membership Tykes (Player, Coach, Trainer, Executive, etc...)
- Age Groups (PeeWee, Midget, etc...)
- Roles (Head Coach, Manager, Referee, etc...)

To date, the only constraints above that have been used are to birth date and membership type. So, in the example of Over 18 Box Fees above, the settings are:

- Over 18 Box Fees
  - **Season:** 2018 Box Lacrosse
  - **Age:** July 1, 1999 and older
  - **Membership Types:** Player, Coach, Manager, Trainer, Executive, Volunteer and Game Official/Referee
  - **Fee:** \$11 - \$10 for insurance and \$1 for regional registrar fee

The screenshot shows the SportzSoft - Ontario Lacrosse Association (ID #1513) interface. The 'Fees set on this tab' section is highlighted with a red arrow. The 'Product Management' section shows a list of products, with '2018 Box Lacrosse - Over 18' selected. The 'Details' tab is active, showing the following information:

- Name: 2018 Box Lacrosse - Over 18 (ID #: 26117)
- Code: (blank)
- Type: Governing Body Registration
- Active: ☒
- Season: 2018 Box Season
- Processing Entity: Registrations
- Processing Starts: 12/28/17
- Processing Ends: 8/31/18
- Apply Merchant Account Transfers to Collect Fees: ☒

Red arrows point to the 'Season' and 'Age' fields, and a red arrow points to the 'Membership type' section. The 'Constraints' section shows the following settings:

- Constrain to this gender and age range: ☐
- Has date of birth prior to (older): 7/01/99
- Constrain to these selected Membership Types: ☒ Player, ☒ Coach, ☒ Manager, ☒ Trainer, ☒ Executive, ☒ Volunteer, ☒ Game Official/Referee
- Constrain to these Age Groups: ☐ Pee Wee Girls, ☐ Tyke, ☐ Juvenile, ☐ Paperweight

The 'Processing Summary for 2018 Box Season' table is shown below:

PGB Product	Count	Fee Total	Balance
2018 Box Lacrosse - Over 18	2383	\$32,807.00	\$15,543.00
2018 Box Lacrosse - Under 18	16221	\$178,431.00	\$20,218.00

The 'Processing Summary by Club for 2018 Box Lacrosse - Over 18' section is also visible at the bottom.

## Processing GB Fees

As club player and volunteer registrations are processed, each night a software process is run that looks for new registrations in all the OLA clubs and processes the GB Fee payment. This process transfers the required payment from the club Peloton account to the OLA Peloton account.

Only one fee is processed per registrant, so if a player or volunteer registers for more than one product, the system only processes Governing Body fees once.

Governing Body Fees cannot be processed if:

- The club doesn't process credit card payments
- There are several volunteer registrations which have an associated OLA fee but no funds are collected
- The club's Peloton account is empty because the Peloton funds have been transferred to the club bank account

## How Can I Monitor Which Registrations Have Been Paid?

In the OLA account, go to REGISTRATIONS and then PRODUCT MANAGEMENT and make the Governing Body products 'active'.



**Registrations / Product Management**

**Product Management** ?

9 Products

Filter: ☒ Active Only ☒ Invoices ☒ Governing Body ☒ Memberships ☒ Sports ☒ Volunteering ☒ Prom

Product	Season
2018 Box Lacrosse - Over 18	2018 Box Season
2018 Box Lacrosse - Under 18	2018 Box Season
Try Lacrosse 2018 Box	2018 Box Season
2018 Field Lacrosse - Over 18	2018 Field Season
2018 Field Lacrosse - Under 18	2018 Field Season
Try Lacrosse 2018 Field	2018 Field Season
2018 Womens Field - Over 18	2018 Womens Field
2018 Womens Field - Under 18	2018 Womens Field
Try Lacrosse 2018 Womens Field	2018 Womens Field

**Set Governing Body Products to 'active'**

Name: 2018 Box Lacrosse - Over 18

Code: Type: Governing Body Registration ☒ Active

**Details** Fees & Deposits Participants (2983) Child Club Products

Season: 2018 Box Season

Processing Entity: Registrations

Processing Starts: 12/28/17

Processing Ends: 8/31/18

☒ Apply Merchant Account Transfers to Collect Fees

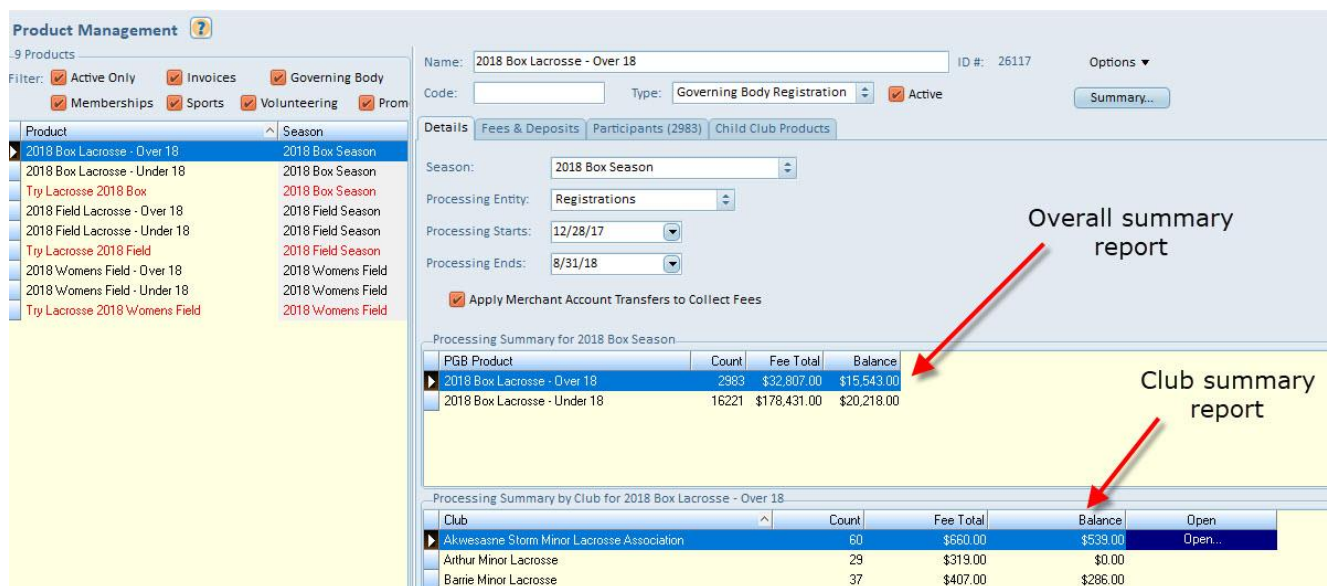
From this screen, you can monitor GB Fee payments in a number of ways.

- On the product DETAILS summary report
- By viewing the club BALANCE report
- By viewing the club TRANSFERS BY CLUB report
- By viewing the club TRANSFERS BY DAY report

## Product Details Summary Report

Select the GB Product from the grid on the left hand side of the screen. Below, you will see that the '2018 Box Lacrosse – Over 18' product is selected. The details of this product appear on the right hand side of the screen.

On the left hand side of the screen, you can see an 'overall summary report' for the product you have selected on the right. It will show you a 'count' of the total number of registrations processed for that product, a 'fee total' that needs to be collected and a 'balance owing'. Then, in the grid below, it shows the details for each club.



**Product Management**

9 Products

Filter: ☒ Active Only ☒ Invoices ☒ Governing Body ☒ Memberships ☒ Sports ☒ Volunteering ☒ Prom

Product: 2018 Box Lacrosse - Over 18 Season: 2018 Box Season

Name: 2018 Box Lacrosse - Over 18 ID #: 26117 Options ▼

Code: Type: Governing Body Registration ☒ Active Summary...

Details Fees & Deposits Participants (2983) Child Club Products

Season: 2018 Box Season

Processing Entity: Registrations

Processing Starts: 12/28/17

Processing Ends: 8/31/18

☒ Apply Merchant Account Transfers to Collect Fees

Processing Summary for 2018 Box Season

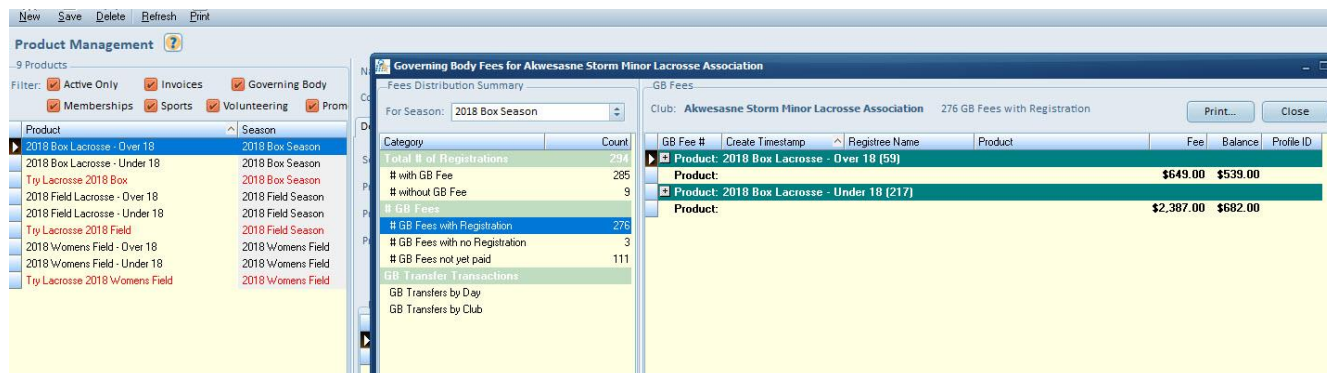
PGB Product	Count	Fee Total	Balance
2018 Box Lacrosse - Over 18	2983	\$32,807.00	\$15,543.00
2018 Box Lacrosse - Under 18	16221	\$178,431.00	\$20,218.00

Processing Summary by Club for 2018 Box Lacrosse - Over 18

Club	Count	Fee Total	Balance	Open
Akwesasne Storm Minor Lacrosse Association	60	\$660.00	\$539.00	Open...
Arthur Minor Lacrosse	29	\$319.00	\$0.00	
Barrie Minor Lacrosse	37	\$407.00	\$286.00	

## Club Balance Report

If you click the OPEN link beside each club balance (as shown above), you can access a detailed club balance report. This report shows all the club registrations that were processed for the GB product selected. So, in the example above, you would see all the club registrations that have GB fees processed for the '2018 Box Lacrosse – Over 18' product.



New Save Delete Refresh Print

**Product Management**

9 Products

Filter: ☒ Active Only ☒ Invoices ☒ Governing Body ☒ Memberships ☒ Sports ☒ Volunteering ☒ Prom

Product: 2018 Box Lacrosse - Over 18 Season: 2018 Box Season

2018 Box Lacrosse - Under 18 2018 Box Season

Try Lacrosse 2018 Box 2018 Box Season

2018 Field Lacrosse - Over 18 2018 Field Season

2018 Field Lacrosse - Under 18 2018 Field Season

Try Lacrosse 2018 Field 2018 Field Season

2018 Womens Field - Over 18 2018 Womens Field

2018 Womens Field - Under 18 2018 Womens Field

Try Lacrosse 2018 Womens Field 2018 Womens Field

**Governing Body Fees for Akwesasne Storm Minor Lacrosse Association**

Fees Distribution Summary

For Season: 2018 Box Season

Category	Count
Total # of Registrations	294
# with GB Fee	285
# without GB Fee	9
# GB Fees	276
# GB Fees with Registration	276
# GB Fees with no Registration	3
# GB Fees not yet paid	111

GB Transfer Transactions

GB Transfers by Day

GB Transfers by Club

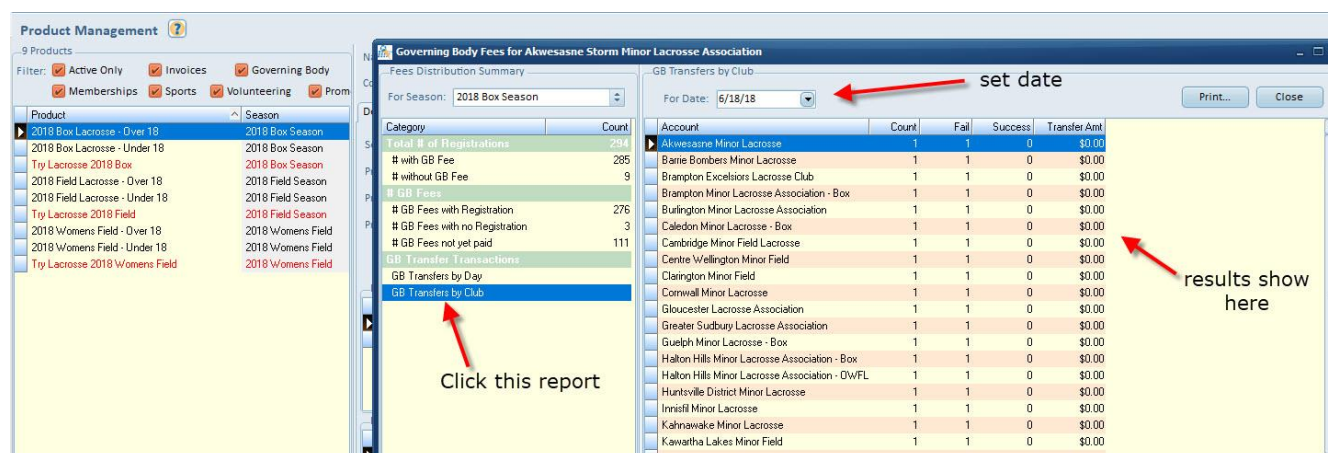
Club: Akwesasne Storm Minor Lacrosse Association 276 GB Fees with Registration

Print... Close

GB Fee #	Create Timestamp	Registree Name	Product	Fee	Balance	Profile ID
Product: 2018 Box Lacrosse - Over 18 (59)				\$649.00	\$539.00	
Product: 2018 Box Lacrosse - Under 18 (217)				\$2,387.00	\$682.00	

## Transfers by Club Report

Using the same report screen as previous, you can click on the 'GB Transfers by Day' for an summary of the transfers made by club.



Product Management ?

Filter: ☒ Active Only ☒ Invoices ☒ Governing Body ☒ Memberships ☒ Sports ☒ Volunteering ☒ Prom

Product: 2018 Box Lacrosse - Over 18 2018 Box Season

Season: 2018 Box Season

Category: Total # of Registrations 294

# with GB Fee 285

# without GB Fee 9

# GB Fees 276

# GB Fees with Registration 3

# GB Fees with no Registration 111

# GB Fees not yet paid

GB Transfer Transactions

GB Transfers by Day

GB Transfers by Club

For Season: 2018 Box Season

For Date: 6/18/18

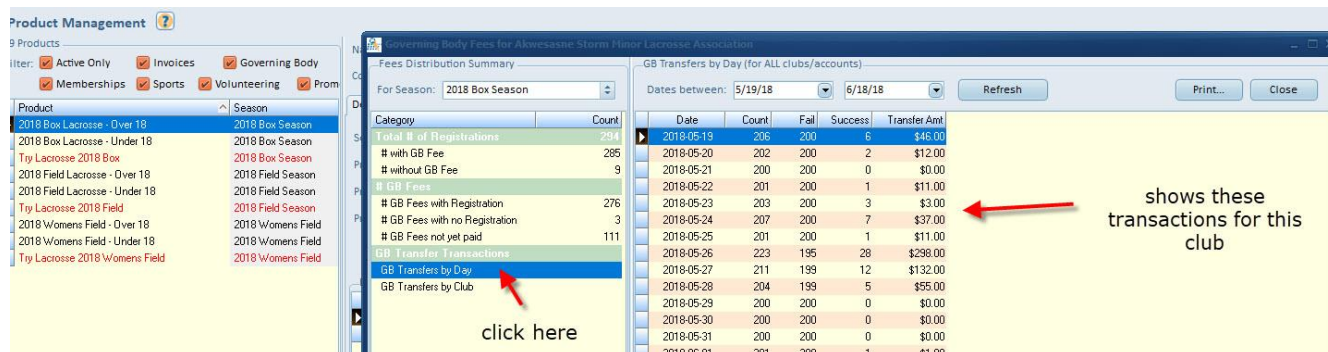
set date

Print... Close

Account	Count	Fail	Success	Transfer Amt
Akwesasne Minor Lacrosse	1	1	0	\$0.00
Barrie Bombers Minor Lacrosse	1	1	0	\$0.00
Brantford Excelsiors Lacrosse Club	1	1	0	\$0.00
Brantford Minor Lacrosse Association - Box	1	1	0	\$0.00
Burlington Minor Lacrosse Association	1	1	0	\$0.00
Caladon Minor Lacrosse - Box	1	1	0	\$0.00
Cambridge Minor Field Lacrosse	1	1	0	\$0.00
Centre Wellington Minor Field	1	1	0	\$0.00
Clarington Minor Field	1	1	0	\$0.00
Corvallis Minor Lacrosse	1	1	0	\$0.00
Gloucester Lacrosse Association	1	1	0	\$0.00
Greater Sudbury Lacrosse Association	1	1	0	\$0.00
Guelph Minor Lacrosse - Box	1	1	0	\$0.00
Haltom Hills Minor Lacrosse Association - Box	1	1	0	\$0.00
Haltom Hills Minor Lacrosse Association - OWFL	1	1	0	\$0.00
Huntsville District Minor Lacrosse	1	1	0	\$0.00
Innisfil Minor Lacrosse	1	1	0	\$0.00
Kahnawake Minor Lacrosse	1	1	0	\$0.00
Kawartha Lakes Minor Field	1	1	0	\$0.00
Kinston Minor Field - Box	1	1	0	\$0.00

## Transfers by Day Report

Using the same report screen above, you can view the amount of dollars transferred from the club's Peloton account to the OLA Peloton account on a day by day basis.



Product Management ?

Filter: ☒ Active Only ☒ Invoices ☒ Governing Body ☒ Memberships ☒ Sports ☒ Volunteering ☒ Prom

Product: 2018 Box Lacrosse - Over 18 2018 Box Season

Season: 2018 Box Season

Category: Total # of Registrations 294

# with GB Fee 285

# without GB Fee 9

# GB Fees 276

# GB Fees with Registration 3

# GB Fees with no Registration 111

# GB Fees not yet paid

GB Transfer Transactions

GB Transfers by Day

GB Transfers by Club

For Season: 2018 Box Season

Dates between: 5/19/18 6/18/18

Refresh

Print... Close

Date	Count	Fail	Success	Transfer Amt
2018-05-19	206	200	6	\$46.00
2018-05-20	202	200	2	\$12.00
2018-05-21	200	200	0	\$0.00
2018-05-22	201	200	1	\$11.00
2018-05-23	203	200	3	\$3.00
2018-05-24	207	200	7	\$37.00
2018-05-25	201	200	1	\$11.00
2018-05-26	223	195	28	\$298.00
2018-05-27	211	199	12	\$132.00
2018-05-28	204	199	5	\$55.00
2018-05-29	200	200	0	\$0.00
2018-05-30	200	200	0	\$0.00
2018-05-31	200	200	0	\$0.00
2018-06-01	201	200	1	\$1.00

## Conclusion

Using the GB Fee reports allows for ongoing review and monitoring of GB Fee collection and balances.

We hope you enjoy using the SportzSoft Online Registration system. If you have any comments or suggestions, we would be happy to hear from you!

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