TeamUnify™

HOW-TO'S - TIPS - TRICKS

and

BEST PRACTICES

guide

Powered by: TU University™

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Managing the Business of Swimming

Your Swim Team is Big Business. The coaching and services you provide to the swimmers on your team are important. The costs for these services rate high on any family's budget. Two key areas that will greatly enhance your member retention and satisfaction levels are communications and expectation setting. By setting clear and documented guidelines and goals and then consistently communicating this information, your team members will see how efficient a business you truly are.

Communication
Steady and relevant e-mail communication is critical to getting the attention and involvement of your membership. Long gaps between communicating to your team should be avoided at all costs.

Expectation Setting
Create and communicate your team's expectations often and don't be afraid to repeat them. Create your team's "guidelines and goals" and publish them privately to the teams website. Parents and swimmers will appreciate knowing what is expected of them and what can be accomplished when they meet these expectations.

Program Value & Benefits
You're selling a service. Sell, resell and promote the benefits of swimming on your team to your family's and most importantly to your incoming swimmers. Make your program an exciting and important program.

Critical. The moment that your team begins or improves its business thinking, your family's will immediately feel the positive changes.

Selling Your Swim Team's Program Benefits

Don't forget you're selling a service and you should be promoting the benefits and rewards of swimming to your existing families and to potential new swimmers. Just a little selling will go a long way to making your program the exciting and interesting service it truly is. Swimming has many sell-able positive qualities which we describe below:

- Creates and develops life skills
- A fun and safe environment for all ages
- Learn to swim and develop confidence in and out of the pool
- Breeds healthy, individual competitiveness and encourages teamwork
- Gets you in shape and keeps you fit
- Establishes better eating habits
- Teaches the fine art of how hard work and dedication can deliver results
- Teaches positive goal setting skills
- It's a great way to make new friends and lasting friendships.

Remember you will not make everyone happy. Don't let the less than 1% of your membership dictate how you run your team. Remove families/kids from the team that break the established and published rules. You'll be far happier and more importantly so will your families. Set your own "No Shirt, No Shoes, No Service Rule".

Team Administrator Performance

Administrator Performance
Your available time as a team administrator is a precious commodity. As most team administrators are volunteers, time constraints are always tight. Run board meetings or similar with a strict agenda. Focus on the critical items that need resolving.

Live by the 80/20 rule. Focus on the 20% that represent your core team needs and you'll deliver 80% of what your family's requires. Here are some of the 20% items to put near the top of your priority list:

- Right pricing your dues
- Budgeting and cash-flow management
- Coaching expectations, responsibilities and improving productivity
- Make sure all administrators have job descriptions
- Family expectations and communicate the plan to the families
- Parents should not be allowed to be delinquent unless there is an exception.

Administrator Responsibilities & Succession Planning

The two most over-looked responsibilities of team administrators is the failure of creating accurate job descriptions [with objectives and expectations] for each administrator position. Second is succession planning for when an administrator leaves their respective post. Put in place an action plan for new administrator training.

Administrator Responsibilities
Think of the administrator job description as no different than how a company would define each position within the company. Specifically, defining roles and responsibilities for each administrator. The requirement to apply this level of detail is critical to establishing administrator deliverables and what the team expects.

Most families avoid being part of team administration. Primary reason is that it's a volunteer position and is not a compensated position. Subsequently, a team gets a couple choices and in the end the team takes what they get. Ultimately the need to create more demand for each position is by creating the positions as offering "compensation". Compensate a limited number of Administrators based on each position and contribution. The great news is the team can write the loss of revenue as a cost of doing business. The following is an example of how compensation could be structured.

Core Roles:
- President = No dues
- Billing, Treasurer, Vice President = 75% off of all dues
- Job Sign-up, Fundraising, Vice President = 50% off of all dues
- Support Roles: 25% off Dues [limited actual tasks]

Succession Planning
Your administrators will leave your team. It's either mandated with-in bylaws established by your team at predicated time-frames or an administrator deciding to leave for any number of personal reasons. Failing to establish a new-administrator training plan for each role would be like a company hiring a new employee and not training them, yet expecting productivity out of them. It's simply impossible. **Create a new administrator training plan**! Here are some key points to think about:

- Plan/schedule far enough in advance for administrator turn-over
- Develop an education plan with TeamUnify
- Require new administrators to participate in TU trainings

Going Social

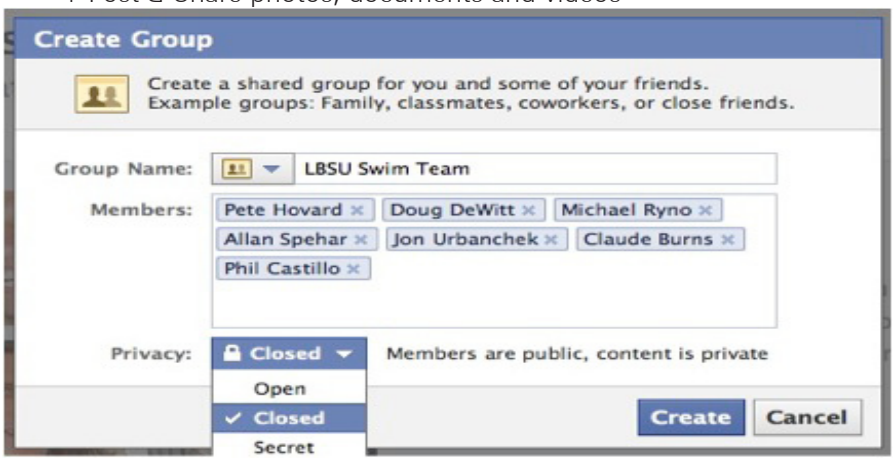
Going social is not just a fad. It's become a powerful communication and connectivity tool for businesses. There are many choices in the world in going social. Facebook, Twitter, Digg, Buzz to name a few. However, the only one that really matters is Facebook. 500 million people cannot be wrong. There are 165M active people and business registered with Facebook in the United States. Not only is the number staggering and growing, it's the usage statistics of these accounts. Suffice it to say, it is a very active and vibrant community.

Be social - don't be afraid. Find a parent or an athlete on your team to get you going. It's not difficult and it's a powerful communication tool.

- To keep your life simple, focus on Facebook. It's hard to argue with 500 million users. They ARE the current standard and the vast majority of your families and swimmers are connected to Facebook. If they are not, then you'll help them to get connected.
- You should be aware of privacy. However, don't let it get in the way of using what Facebook can bring to your team.

NEW!: Facebook Groups: [http://www.facebook.com/groups]

+ With Facebook you can now create an invite only group
+ You can have private discussions
+ Post & Share photos, documents and videos



o Facebook [help: http://www.facebook.com/help/?ref=drop]
o http://www.facebook.com/groups/
o http://www.facebook.com/help/?page=1193
o http://www.facebook.com/help/?page=414


SwimOffice™

Account Member Admin

What you'll learn in this Section:

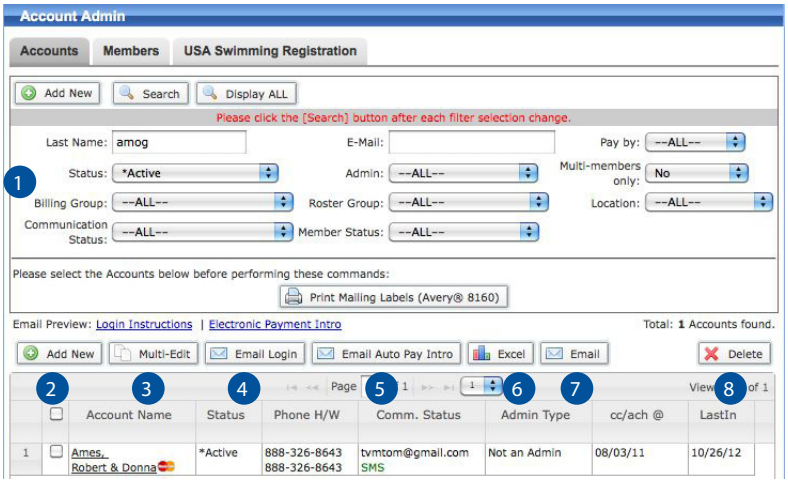
- How to add an account and member.
- How to manually reset an account password.
- How do you multi select accounts and change their account status and access rights.
- How to see which accounts are staying in touch with the team.
- How to view an accounts payment method and membership dues schedule.
- How to filter the members by a billing group and multi edit them into another billing group.
- How to generate a USA reg package for your current/active swimmers.

Tutorial Account Member Admin Overview

Tutorial Communications Editor

OnDeck Account Member Management

Account Member Admin



Tips and Tricks

Did you know you can e-mail your suspended or canceled/ hidden members from this tab? Search using your status filter, put a check mark next to some or all accounts you wish to e-mail and hit your e-mail button to send a free form e-mail. This is a great way to 'nudge' your non active membership.

The accounts tab generates the account view. Use the filters to locate the information needed.

1. **Filter by status** (active,suspended,cancel/hidden, contact request), admin (level of admin user; Super-User, Webmaster event admin, e-mail print calendar), Pay by: (check, CC, ACH), multi-members only (no = everyone/yes=only accounts with multiple athletes). Billing Groups/Roster Groups/Locations/Member status will filter by the athlete or member.

2. **Add New** – Used to create a new family account

3. **Multi-Edit** – Place a check mark in the box to the left of the name (s) and use multi-edit to update the information. Options include status, membership, admin.

4. **E-mail Login** – Place a check mark in the box to the left of the name (s) and use this button to e-mail the system generated unique password. Re-sending the password to an account does regenerate a new password but re-sends the current password set in the account.

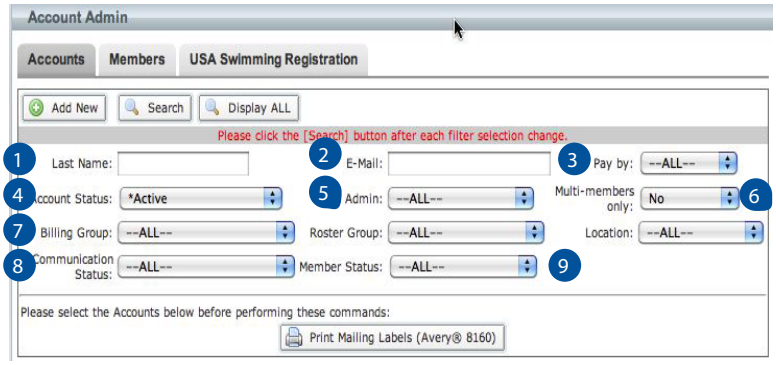
5. **E-mail Auto Pay Intro** – This button will ONLY show if you have credit card or ACH functionality in the system. Use this option to send off instructions on how to enter in credit card or ACH information.

6. **Excel -** Use this button to generate an Excel report containing the account level information.

7. **E-mail** – Use the check mark functionality as stated above to send out an e-mail from this area. This can be used to send e-mail to suspended or canceled/hidden accounts.

8. **Delete button** – Use the check mark function to delete accounts. Once an account has gone through one billing cycle you will not be able to delete and you will need to cancel/hide the account.

Account Member Admin



Tips and Tricks

The best way to ensure everyone has verified their e-mail address or phone number is to use the communication search parameters;unverified filter, select all and e-mail. Let them know it helps for quick messaging regarding critical team information.

1. **Last Name** - Enter in the last name and select search. This is a "fuzzy" search field meaning you can enter in the first few letters for the system to do a search.

2. **E-Mail** - This system can only accept one instance of an e-mail and will not allow duplicates. It can search on any e-mail address including 'non primary'.

3. **Pay by** - Allows the admin to search by accounts that pay by check or credit card.

4. **Account Status** - Search by All Non Cancelled, Active, Not Set, Waiting for Approval, Suspended, & Waiting for Approval.

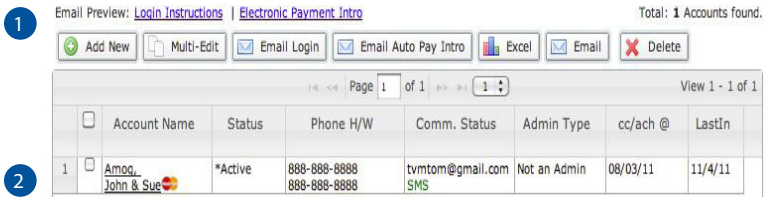
5. **Admin** - Search by the level of administrative privileges for example NonAdmin, Super User etc.

6. **Multi-members Only** - This will allow you to search for accounts with more than one athlete.

7. **Billing Group/Roster Group/Location** - Search for an account with at least one athlete meeting the filter specifications.

8. **Communication Status** - This will show you what accounts have either verified or not verified their email address or cell phone number. This allows communications from OnDeck.

9. **Member Status** - This filter will help the admins to search by member status for example; Active, Suspended, etc. Chose status, "Only Non Active" to show accounts with no current, active swimmers.



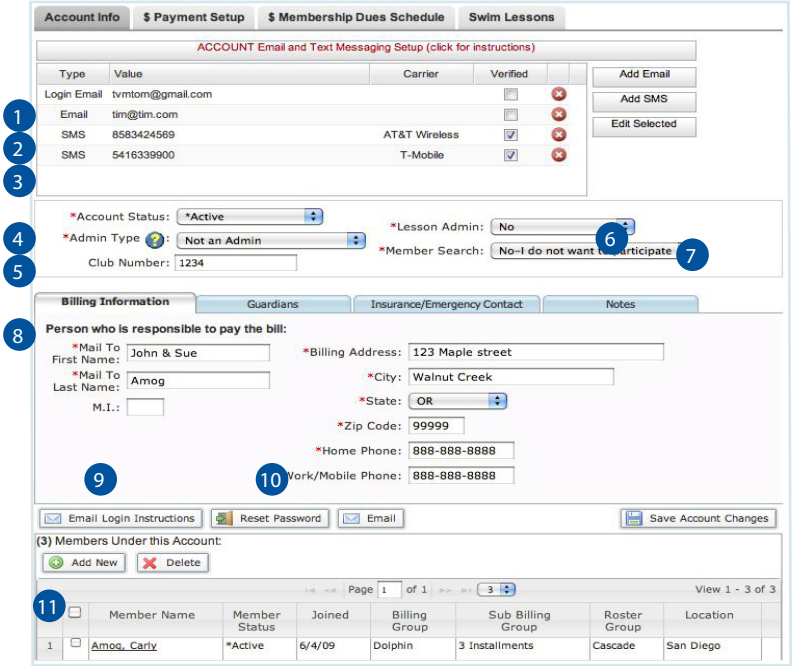
Tips and Tricks

Use the LastIn column to e-mail those accounts that have not logged into the system.

1. **E-mail Preview** - Select Login instructions to view what the e-mail says that goes out to your members when you "E-mail Login". If you have credit cards/ACH turned on for your site, select the Electronic payment intro to view this e-mail. You can send this email by selecting accounts that have not signed up to be automatically deducted and then selecting the 'Email Auto Pay' Intro button.

2. **Filter Options** - Based on the filters that you select in the above instruction, your results will be viewable in this screen. Remember, if you select the account name, it will bring you into the edit function.

Account Member Admin



Tips and Tricks

Did you know you can reset an accounts password if needed? Use the Reset Password button to enter in a new password generated by you. This is also a great way to make an admin account for admin type: Not an admin for testing purposes.

Did you know you can communicate quickly with your accounts if they go through the verification process. Once they have verified either e-mail address or text, you can quickly communicate using your OnDeck application.

1. **Login E-mail** – This must be a unique address and will be the primary for all e-mail sent. User will be asked to verify this e-mail. Once verified, you can use this functionality in OnDeck for communication. Verified will show a check mark in the box "verified"

2. **E-mail** – This will be CC'd on all e-mail except the password e-mail and invoice e-mail (these only go to the primary). This is not required and can also be verified as above.

3. **SMS** (short message service) - Users can have their cell phone number verified to be used as above.

4. **Account Status** – Use this to set the account status. Active for current accounts, Suspended for accounts that may return and canceled/hidden for accounts that have left the team.

5. **Admin Type** – Use the dropdown to give admin access to administrators of the site. Leave all swimmer accounts as not an admin. Select the green ? for admin privileges.

6. **Lesson Admin** – This will only be viewable on sites which are using the lesson module. It allows for status levels to be set for admin rights to the lesson module.

7. **Members Search** – This will either include or exclude this account and members in the member directory. The Member Directory feature is for logged in accounts only.

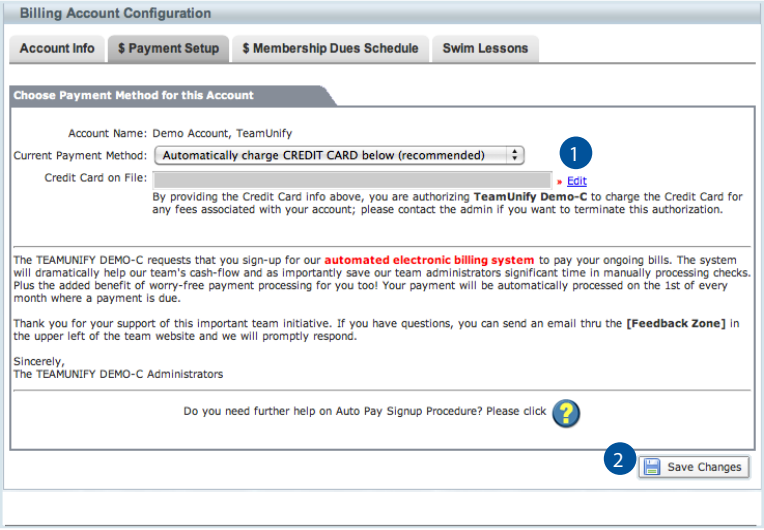
8. **Billing information** – All account billing information

9. **E-mail Password** – Send the password e-mail to the primary e-mail address on this account.

10. **Reset Password** – Allows the SuperUser to manually reset the password. This is a good option if the account tells you they have not received their password e-mail.

11. **Members under this account:** This option appears once you have saved the account information. Use the **Add New** button to add each member (child) under this account. Click on the child's name to edit or make adjustments in this area.

Account Member Admin

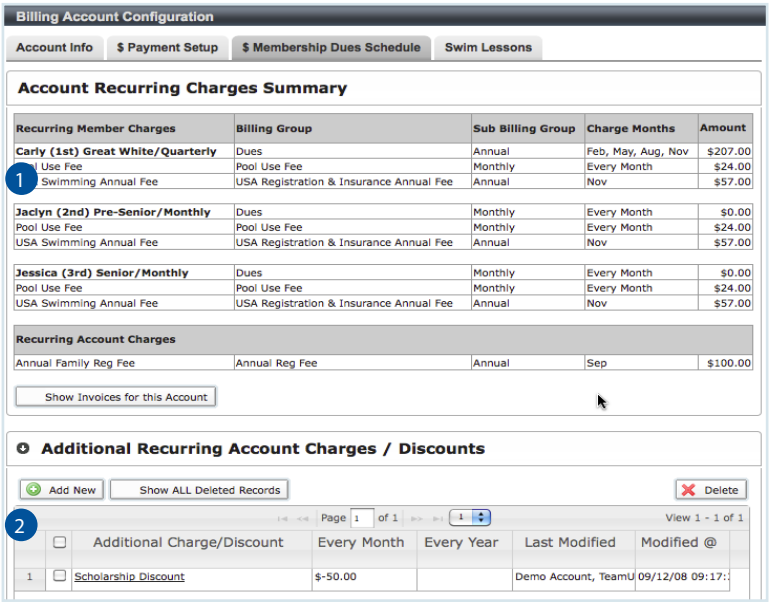


Tips and Tricks

Did you know that if you have CC/ACH you can have the option to 'Manually MAIL payment to Team' removed? Admin will always have the option to override on an account by account basis. E-mail support@teamunify.com to request this.

1. **Current Payment Method** - Accounts will set their payment type of either check, credit card or ACH. SuperUsers can manually update the account information as well but will not have access to viewing a users CC or ACH information at any time. This is HTTPS secured and 128 bit encrypted.

2. To read more about this function click on the **green question mark** located in the bottom right.



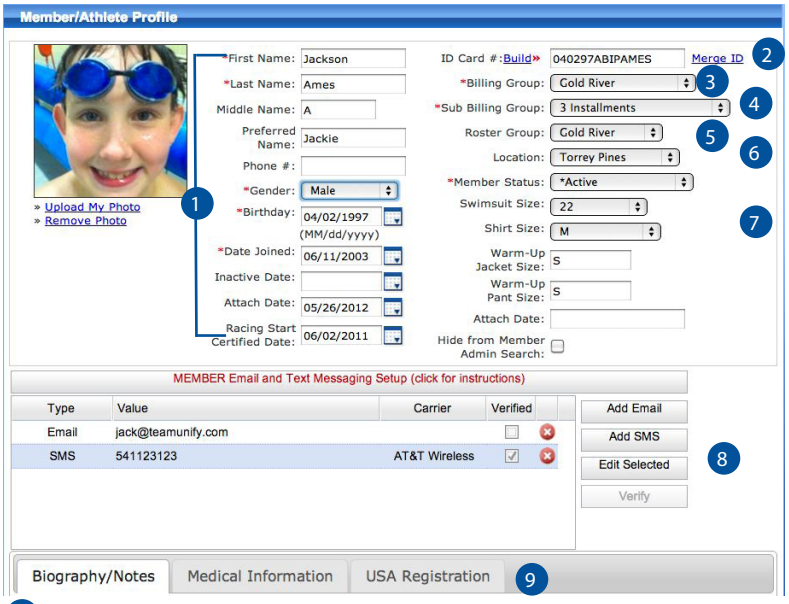
Tips and Tricks

Did you know that you can see the same invoice view as your accounts by selecting: Show invoices for this account. You can also create a new invoice while in this view.

1. The Membership Dues Schedule is a snapshot of the yearly billing of each account. Your members view this when they click "My account" located on the left/right side of the site. This function is managed from Billing Setup < Membership Dues Schedule.

2. **Account Additional Recurring Charges Discounts** – Use this function to add recurring charges against an individual account. For instance a monthly scholarship discount.

Account Member Admin



Tips and Tricks

Did you know if you upload the athlete's photo into their profile you can view it in your OnDeck application?

At the bottom of the page, click the "Edit Billing Account" link to be brought back the family's main account page.

Use the Attach date to have your meet entries auto set you as UN until your 120 days are up.

1. **Add all pertinent information into each field.** First, Last, Middle and birthday will be the fields that create the USA ID card #. Use the Inactive date to help you remember to set them as Inactive. Set the Attach date as the date they become attached to the team. This will auto set meet entries to UN. Racing Start will integrate into the USA Reg package.

2. **ID Card# Build** – Select the Build button to create the USA ID number automatically. Each USA ID# is critical for attaching Results/Entries to each athlete.

3. **Billing Group** – The billing group tells the billing system how much to charge. These dollars are setup in the Billing Setup < Membership Dues Schedule.

4. **Sub Billing Group** – The sub billing group is the frequency of the charge

5. **Roster Group** – use this designator to show what level of swim group the athlete is in.

6. **Location** – This is used when a team swims out of more than one facility. You can use this designator for many other options as well. For example you could add each coach name to the location and attach athletes accordingly.

7. **Member Status** – Active (currently swimming), Suspended (taking some time off), Canceled/Hidden (they have left the team).

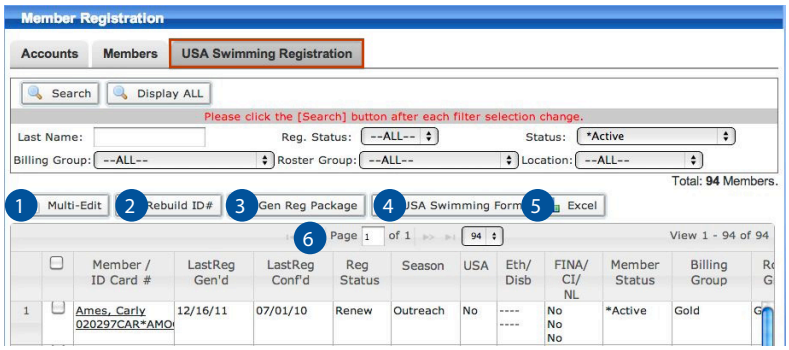
8. **MEMBER E-mail and Text Messaging Setup** - Accounts can select the Add E-mail or Add SMS to their individual child's profile to be included in communications from OnDeck.

9. The tabs; Medical Information and USA Registration can be updated by the family upon login.

OnDeck

Coaches using OnDeck with Super User Access Privilege can change the Billing Group, Sub Billing group, roster group, location, member status and gather USA Swimming's Racing Start Certification while standing on deck.

Account Member Admin



Tips and Tricks

Did you know that the Excel Spreadsheet is a great way to have a quick look at all of the swimmers USA reg data? This simple spreadsheet can also work for a roster sheet without all of the personal data.

USA Swimming Registration function can be used to register or re-register your athletes with USA Swimming through your LSC.

1. Multi-Edit – Use the check mark function to multi select athletes and change one or many of the USA fields.

2. Rebuild ID# - Use the check mark function to rebuild the ID#.

3. Gen Reg Package – Use the check mark function to select your athletes and then select this button to generate the electronic version to be sent to your LSC. This system will calculate the necessary fees.

4. USA Swimming Form – Use the check mark function to select your athletes and then select this button to generate the PDF version of each athlete's form.

5. Excel – use the check mark function to select your athletes and print out an Excel form to view all USA information for each athlete.

6. Page 1 of x - Use the arrows right or left to show you the next 'x' number of records or select the down arrows to the right of the number field to select all records.

Account Member Admin

Frequently Asked Questions

Q How do I change what I see in the Membership Dues Schedule?

A The dollar amounts come from the Billing setup < Membership Dues Schedule Tab < Find < Member/athlete Profile. If you notice an athlete in the wrong Billing group or even the wrong Sub billing group (monthly/annual) you can change this in account member admin, members tab.

Q When would I use the recurring charges/discounts feature?

A This option is available for any accounts that have charges or discounts that occur outside of the normal billing setup. For instance, the coach's children may receive a 50% discount off of dues. You could place them in the correct billing/sub billing group but make adjustments in this area. Once you have applied it, the system will automatically add this to the bill to offset charges.

Best Practices

Retention & Performance Strategies

- Review the 'last in' column to see who has never signed in. Resend the password e-mail to these accounts to softly encourage them to sign in. Have one team administrator for this task and call them the "Team Ambassador".
- Review e-mail open rates in Message Track. It's not exact science, but give you an picture of who is not paying attention.
- Look for e-mails that are: invalid_xxxxx@teamunify.com and update these with real e-mail addresses..

Speed

- Use Multi-edit for bulk changing accounts and member views to change multiple parameters within each record
- Fuzzy search. You need only type partial last names and click the search button. Gets you what you want faster.

  Combine the fuzzy search with other filters for fast, customized queries.

Communication

- Track attendance with OnDeck. Publish/announce attendance results. Create rewards/incentives. Get your team involved.

Polish

- Add swimmer photos to the member page view with OnDeck. A great way to quickly add a picture to your news items.

Account Member Admin

Notes

Website Design & Editing

What you'll learn in this Section:

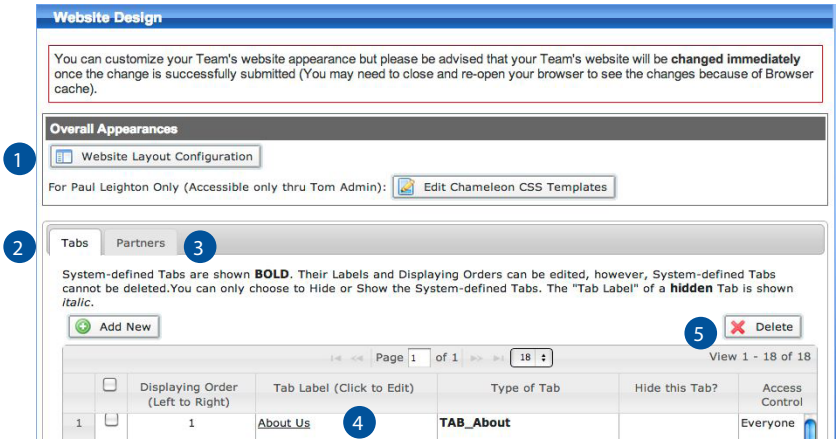
- How to change the layout on the home page.
- How to change the background.
- How to add a new tab and sub menu.
- How to use the text editor to link a document and add a graphic.
- How to use the text editor to add a linked URL to an image.
- How to add a Facebook button to your site.

Tutorial Website Design Overview

Tutorial Adding a Document

Tutorial Creating a Google Analytic Account

Website Design & Editing



Tips and Tricks

A great way to test your editing skills and apply new editing functionality is to create yourself a test page that is SuperUser accessibility only. Go to your tabs and select Add New. Call your Tab "Test" for example ,and ensure only a SuperUser has access upon login.

Introduction: Begin by logging into your site and selecting website design on the left side. Your view will reflect the screenshot above.

1. Website Layout configuration
   This will access your Chameleon Design Template. This will control your home page and site look and feel. Don't be afraid to change things around on your site to find the best view for your team.

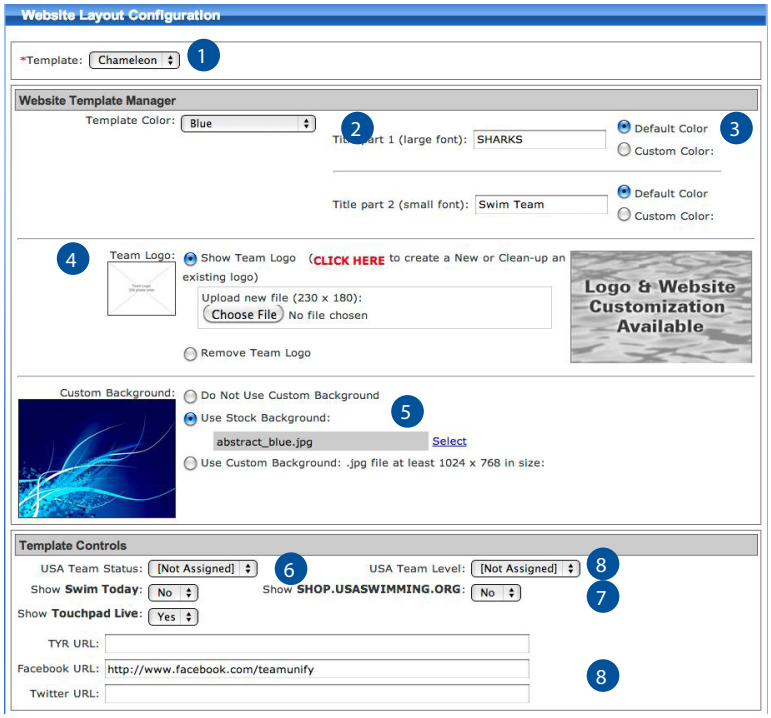
2. Tabs Area – Add New
   - This option will build a new tab on your site. Fill in the required fields and save changes.
   - Once you have saved changes you now have the option to build a sub-menu (dropdown). Select Add New and fill in the appropriate fields.

3. Partners
   Select your Partners tab to add logos and links for such things as team sponsorship programs. You can then control the layout of this using the Layout Configuration Button above.

4. Tabs Area – Edit Tab (select the tab name)
   Use this option to edit your tab name and properties and/or your sub-menus name and properties.

5. Delete - Place a check mark to the left of the tab you would like to delete and select this option. Please note this is not reversible nor can you delete TU defined tabs (in Bold)

Website Design & Editing



Tips and Tricks

Did you know if you use a custom skin you can control the color of your tabs using the Template Color drop down function.

If you are using a custom background ensure you use a high resolution photo or the result will be distorted.

The color pickers are a great way to add branding colors to your headers.

Introduction: Begin by logging into your site and selecting website design on the left side. Your view will reflect the screenshot above.

1. **Template** - Select Chameleon to access your Chameleon Design Template. This will control your home page and site look and feel. You will also see two other templates; modern & classic. These are legacy templates but available for use.

2. **Template Color** - Use the drop down to immediately change the color/look of your site.

3. **Website Title part 1 & 2** - Place your Swim Team name in these two fields. The first field will appear larger than the second field. These fonts are fixed. Use the custom color picker to add color to your font.

4. **Team Logo** - Select the radio button (show team logo) to upload your logo. This will appear only when you are not signed in and will appear below the sign in button.

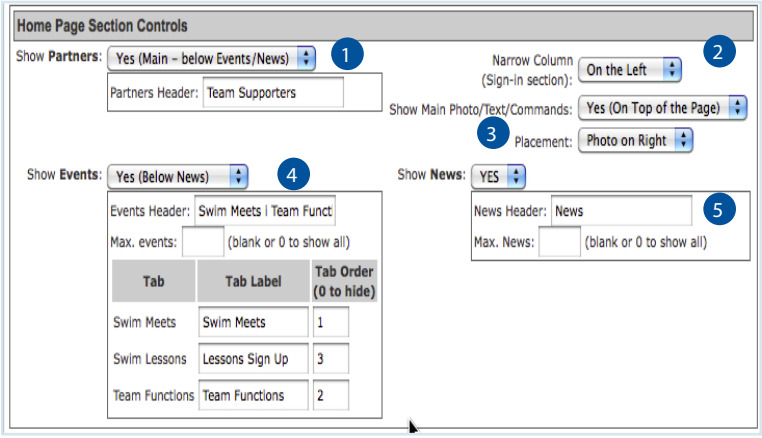
5. **Custom Background** - Chose the stock background to select TU stocked skin for your background or use the custom background option to upload your own high resolution photo (1024 x 768).

6. **USA Team Status/Team Level** - Use the drop downs to apply the correct status and level to your banner area.

7. **America's Swim Team/ Shop.USAswimming.org** - Turn these two toggles to Yes to have these available to your accounts/public. America's Swim team has a wealth of information for athletes, coaches and parents.

8. **TYR, Facebook, Twitter URL** - Place the URL of one or all of these options and you will automatically have a corresponding badge and link appear on the left or right of your site (depending on where your login is placed).

Website Design & Editing



Tips and Tricks

Your partners function is a great way to get sponsorship for your team. Let them know they get not only get viewed by your membership but any visiting team as well as the general public. This equals great exposure.

1. **Show Partners** - Use the drop down to select where you would like to place your partners that were created after selecting Website Design < Partners Tab. Place the name you would like to use to designate "partners" for instance: Sponsors.

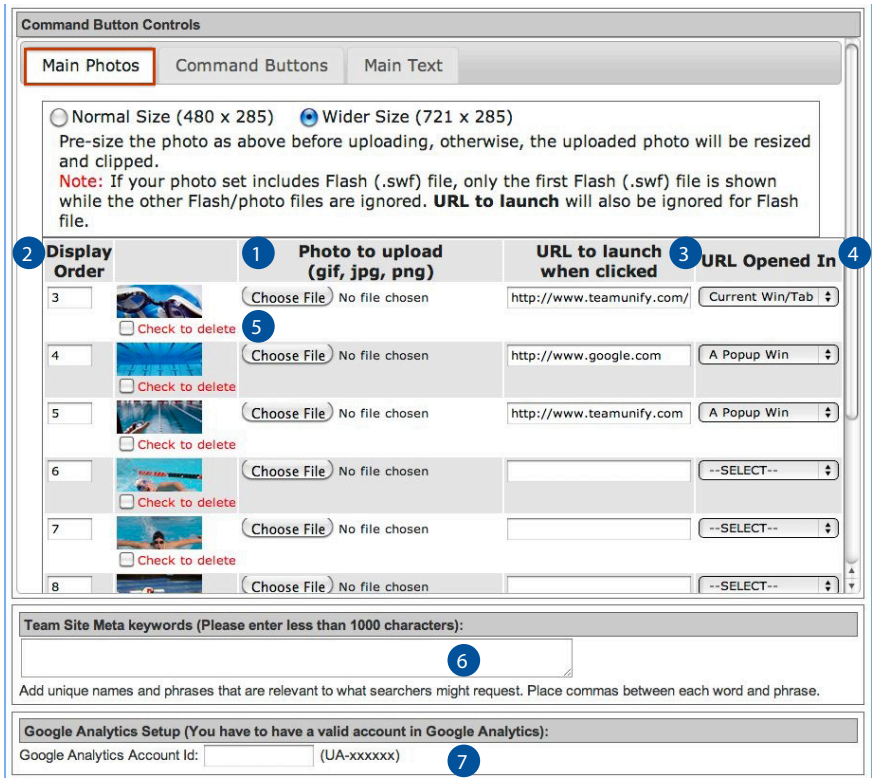
2. **Narrow Column** (sign-in section) Select where you would like to place your sign in.

3. **Show Main Photo/Text/Commands**: Select where you would like to place these features on your home page. Instructions for setup are in the next section. You can also select the placement of your photo uploaded in the next section.

4. **Show Events:** Select where you would like your events to be listed (based on your events tab). You can also rename the header, place max # to show on the home page and rename the tabs within. Although Swim Lessons is an option it is not usable if you do not have this module.

5. **Show News:** Select to show or hide on your home page. You can also rename the header and show max# or select 0 to show all.

Website Design & Editing



Tips and Tricks

Your command buttons are a great way to direct traffic on your site. Update them often so your team knows the important areas of the site they need to navigate to.

Use your command buttons for such things as "Swimmer of the Month". Your team members will always be interested in this update which ensures they are also seeing the other important information.

1. **Photo to Upload -** You have the option of two image sizes. If you select Normal Size your command buttons will adjust to fit to the left or right of this photo. If you select Wider Size, your command buttons can move independently of the picture and is controlled using the Position selection located in the command button area. When you have your photo(s) selection use the Browse to select either .gif, .jpg. or .png file.

2. **Display Order:** More than one photo turns this piece into a slide show function. Display order tells the slideshow what order to show the pictures.

3. **URL to launch when clicked:** Place a URL in this field and when a user clicks on the picture, it will launch the user into the URL site. Ensure it's the entire URL including http://www.URL.com.

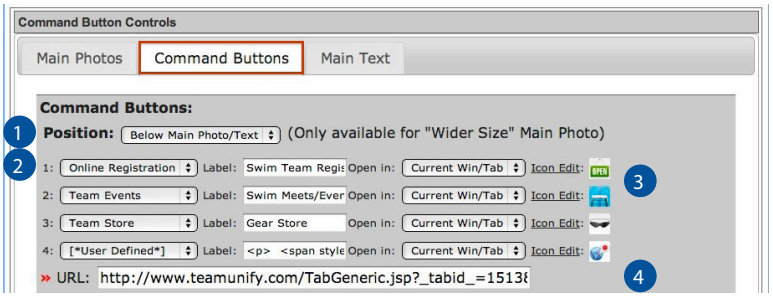
4. **URL opened In -** When a user selects the picture and is directed to the URL, you can use the dropdown options to have the URL open in the Current Window/Tab or Popup Window.

5. **Click to Delete:** Place a check mark in the box to the left and Save changes to delete the corresponding picture(s).

6. **Team Site Meta keywords -** Meta keywords are used to help search engines find your site. The more traffic you have to the site the higher your rankings will appear. Remember to keep these words KEY. You should have identifiers like swimming, swim lessons, city, state, season (year round, summer(etc). More words does not equal higher search engine rankings but it could equal more search engine confusion.

7. **Google Analytic Setup (You have to have a valid account in Google Analytics) -** Enter in your Google Analytics account ID. Click HERE for more information on how to access this code.

Website Design & Editing



Tips and Tricks

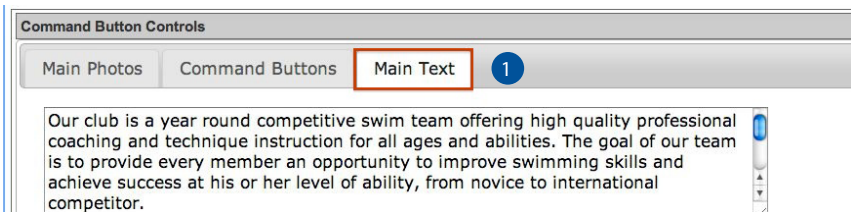
Use your command buttons for such things as "Swimmer of the Month". Keeping your membership returning to your site is the key to good communication.

1. **Position-** You have the option of two image sizes from the tab previous. If you select Wider size, your command buttons can move independently of the picture and is controlled using the Position selection. Use the dropdown to position your command buttons.

2. **Command Button Dropdowns**: Select either *User Define (meaning tabs that the team admin has created) or TeamUnify defined tabs (these will automatically pull in the corresponding URL). If they are User Defined, you will need to copy the URL of that tab and paste it into this section. Label your button appropriately. You also have the option to have this button open in a New Window/Tab, Current Window/Tab, or a popup .These will all appear on the home page.

3. **Icon Edit** - Select this link to give you TeamUnify loaded icons or upload your own. Icons are a great way to add professionalism to your site and branding opportunities.

4. **URL** - Enter in your URL that you previously copied for the tab/page that you would like this command button to "jump" to when selected.



Tips and Tricks

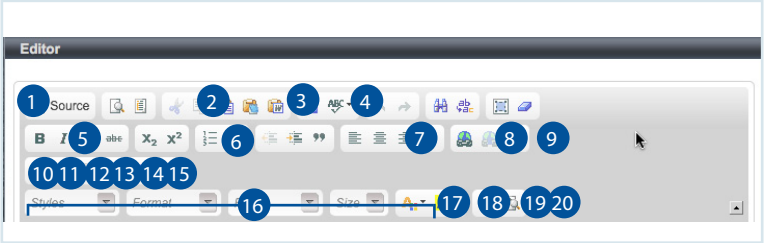
Remember - keep this short. Use your command buttons to direct traffic.

1. **Main Text** - Use this area for a short, professional statement about your team.

Website Design & Editing

To Edit a page/Add content

1. Create your Tab or Submenu
2. Navigate to above
3. Select edit on the right of the page
4. Delete any necessary text/images
5. Begin typing your information. REMEMBER if you will be typing more than 10min. of text, please use a word processing program and cut and paste into the editor. Please use the correct paste clipboard to ensure good results. Also pay attention to any formatting styles that you use on your word processing program. The TU editor only accepts a small amount of font and formatting styles.
6. Save Changes



Tips and Tricks

Did you know you can override the default hyper link color? Type your text that you will be linking to, highlight and format first and then attach your link.

Editor Map:

1. Source Code – use this to prepare your editor for HTML (for instance embedding a Google Map)
2. Cut, Copy, Paste
3. Copy from Word – use this when you are copying from Word to eliminate some of the HTML confusion.
4. ABC – Spellcheck
5. B(bold), I(italic), U (underline), abc (strikethrough)
6. Numbering, bullets
7. Left, Center, Right, Justify alignment of your text or images
8. Link (to add a document or a URL to anything including images and text)
9. Anchors (see the corresponding FAQ on how to apply anchors)
10. Add an image
11. Add a Table
12. Add a horizontal bar
13. Add an emoticon (smiley face etc)
14. Add a special character (for instance a copyright symbol)
15. Insert a break
16. Styles (highlight for instance), Format, Font, size
17. Font color
18. Highlight Color
19. Full Screen (click this again to return to normal view and to be able to save your work).
20. Shows you your paragraph blocks

Website Design & Editing

To add a Document

1. From within the editor type the name of the document you will be attaching. Make any formatting changes before you attach the document.
2. Highlight your words to link to
3. Select the link button (#8)
4. Select Browse Server
5. The left side acts like your PC file interface. Click on Files or Images. Right click to add sub folders or delete
6. Select Upload and then browse to find you document
7. Select your document
8. Select 'Upload Selected File'
9. Double click on your file to bring yourself back to the link box
10. Select Ok
11. Continue editing your page or select Save Changes.

Frequently Asked Questions

Q How do I attach a link to a picture?

A Place your picture into the editor as described above. Once you have it placed appropriately, right click on it, select Edit Image and go to the Link tab. Place your URL in the URL field and select Ok and then OK again. Save your changes and click on your image to test your link.

Q I copy and pasted my information and when I select Save Changes it doesn't look like my original. What happened?

A Remember that the editor is taking a best guess of your information and transforming it into HTML. TeamUnify suggest writing it up without the fancy formatting and copying your plain text into the editor. Once you have it within the editor, use the formatting tools available.

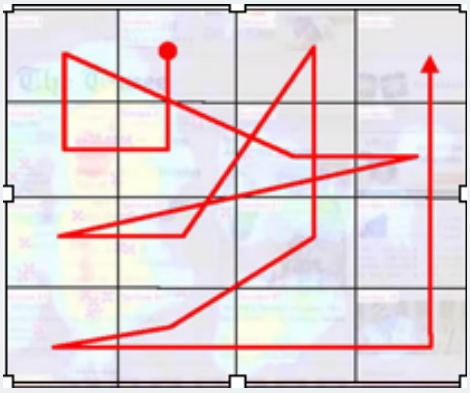
Other FAQ's that relate to this subject (go to FAQ on your site and type in these solution #'s).

1. How do I add a Forum to My website?
2. Adding a slide show or picture collage/photo Gallery
3. Scrolling Text or Marquee
4. How do I add a Facebook or Twitter button
5. How do I add a Facebook Widget or Badge?
6. How do I add an RSS Feed (dynamic news feed)

Best Practices

Retention & Performance Strategies

- Place core menu's and information in upper left quadrant of site [red]



Your audience is generally a distracted group. Place the most important messaging and imagery in the upper-left for maximum visibility. Here is our suggestion for tab ordering:
Events > News > Calendar > About Us

- Make site changes slowly - communicate them to your team
- Fewer menu's with use of sub menu's
- Don't make everything public. Allow certain information to be accessible to only signed in accounts. Password protected information creates a feeling of professionalism and privacy and drives your membership to sign-in.

Speed

- Use Chrome, Firefox or Safari - Do not use Internet Explorer when signed in

Communication

- Have a Facebook account and update it once every week minimum.
- Use OnDeck to post news to the team website and Facebook at the same time.

Polish

- Do not let pages fall wider than the TeamUnify site framework allows. This will make the team have the appearance of being unprofessional.
- Uniform font size and limit colors of font on the same page.
- Verdana or Arial font are the 2 best choices.
- Use Google maps for your locations Select HERE for more information. Google Maps are not only interactive, they offer a finished look to your site.
- If you really want to get a unique look, leverage TeamUnify's custom site skin services, it's inexpensive and will help your team look even more professional.

Website Design & Editing

Notes

Event Creation

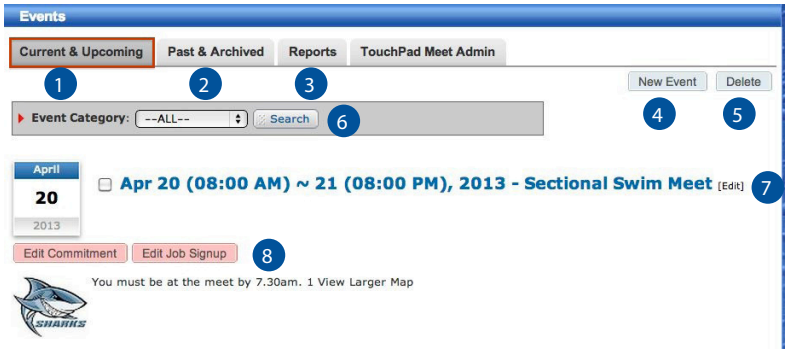
What you'll learn in this Section:

- How to create an event
- How to designate whether this is an event or a function.
- How to turn your event into an online event signup function.
- How to enter in the job signup function.
- How to e-mail event notifications.

Tutorial

Meet Event Creation Overview

Event Creation

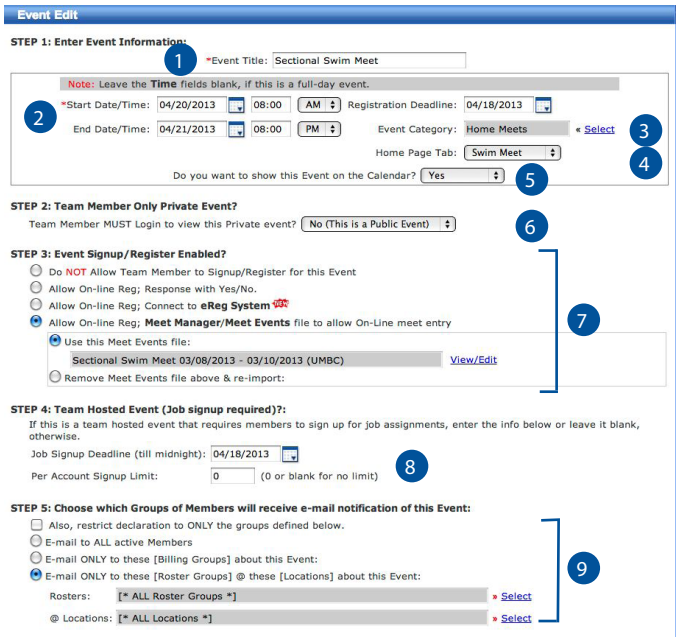


Tips and Tricks

Use the Report tab to generate job signup reports and meet entry information by account and by event. A great tool for administrators and your members.

1. **Current & Upcoming**– All Current and upcoming events or functions.
2. **Past & Archived** - Once the close date occurs for your event it will automatically get pushed into this tab.
3. **Reports** - This tab is used for both public and admin to generate reports by job signup and by meet.
4. **New Event** – Select this button to begin your event creation wizard.
5. **Delete**– Place a check mark to the left of the event(s) that you wish to delete. Please remember any information within your event will be deleted as well.
6. **Event Category**- Use the drop down filter to only show events within that category. These categories are created and selected within the event creation.
7. **Edit** - Select the edit button to edit this event.
8. **Attend this event or Edit Commitment/job signup/register online buttons** - Your accounts will select these button to signup to an event, jobs or use the online registration system. Admins will use these buttons to enter into the administration portal. Once an account has registered or signed up for a job, the button wording will change to Edit Commitment and Edit Job Signup.

Event Creation



Tips and Tricks

Use the per Account signup limit to ensure your accounts don't signup for all of their jobs within one meet.

Use the eReg system function to collect money and registrations for things like an officials training clinic or a team party.

Did you know you can drop in your MeetManager file after everyone has committed and the system will hold that committed designator?

1. **Step 1: Event Title** – Enter in the title of your event.

2. **Start Date/Time:End Date/Time:Registration Deadline -** Enter in all dates and times that are relevant to the event. If you are entering in a time ensure you use a leading zero for instance 07:00.

3. **Event Category -** Use the select to place this event in the appropriate event category for filter functionality. Select Add New from within the select to create the categories.

4. **Home Page Tab** – Use the drop down to chose your event categories used on your home page event tabs.

5. **Do you want the above Event on the Calendar Yes/No? -** This toggle will either place this event on the general calendar or not depending on your selection.

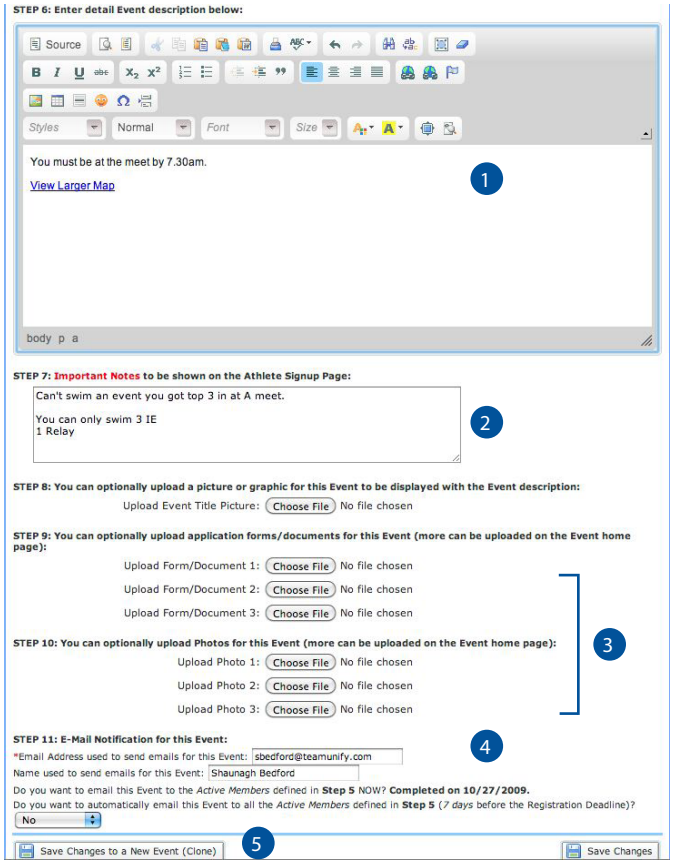
6. **Step 2: Team Member Only Private Event?** – Use the dropdown to designate public or private event. This is not related to signing up for an event as that is always sign in only. This relates to viewing the information and whether you would like the public to be able to view the information (not signup) or only logged in members.

7. **Step 3: Event Signup/Register Enabled? -** Select the radio button that corresponds to the event needs. Your options include the following:
   1. Do Not Allow Team Member to Signup/Register for this event. This is an informational only event.
   2. Allow On-line Reg: Response with Yes/No. The Attend this Event button appears for yes/no.
   3. Allow On-Line Reg; Connect to eReg System. Connects event to the online registration module.
   4. Allow On-line Reg; Meet Manager/Meet Events file to allow Online meet entry. Allows you to browse for your MeetManager event file. Once it's imported, TU becomes an online event entry system.

8. **Step 4: Team Hosted Event (Job signup required)? -** Enter the job signup deadline date to create the job signup button for the event. This job signup button, when selected, allows the job administrator access to create the jobs. Use the per account signup limit to limit the number of jobs per account.

9. **Choose which Groups of Members will receive e-mail notification for this event -** Select the radio button that corresponds to the group that should receive the event notification. **Select the first option**, "Also restrict declaration to ONLY the groups defined below" to enforce entries to only those groups selected.

Event Creation



Tips and Tricks

Use the per Account signup limit to ensure your accounts don't signup for all of their jobs within one meet.

Use the eReg system function to collect money and registrations for things like an officials training clinic or a team party.

Did you know you can drop in your MeetManager file after everyone has committed and the system will hold that committed designator?

1. **Step 6: Enter detail Event description below:** – Enter in any event information needed.

2. **Step 7: Important Notes** - Enter in specific information critical to the event entry. This will appear when an account selects their child to commit to an event.

3. **Step 8/9/10** - Use these steps to upload any pictures and documents related to the event.
   Home Page Tab – Use the drop down to chose your event categories used on your home page event tabs.

4. **Step 11: E-Mail Notifications for this Event** – Enter in the name and e-mail address of the event coordinator that the event notification will come from. When you are ready to e-mail this notification select yes for e-mailing right now and yes for the reminder e-mail. The reminder e-mail will go to all active accounts.

5. **Save Changes to New Event Clone** - Use this function to clone the event. It will not bring the event file import if this event has one. This function only brings over dates, titles, descriptions and filter options.

Best Practices

Retention & Performance Strategies

- Keep you events updated and current to drive your membership to your site. If this is out of date your members will not think this is the place for current information.

Speed

- Copy and Append from a prior event if you have events that are closely related. For instance, A meets an B meets.

Communication

- Use the e-mail event notifications and the reminders to ensure you reach your membership. This invitation also includes detailed instructions on how the accounts can sign up.

Polish

- Use the editor in step 6 to add things such as a Google map. Use step 7 to remind them of important athlete information.

Event Creation

Notes

Job & Volunteer Sign-Up Management

What you'll learn in this Section:

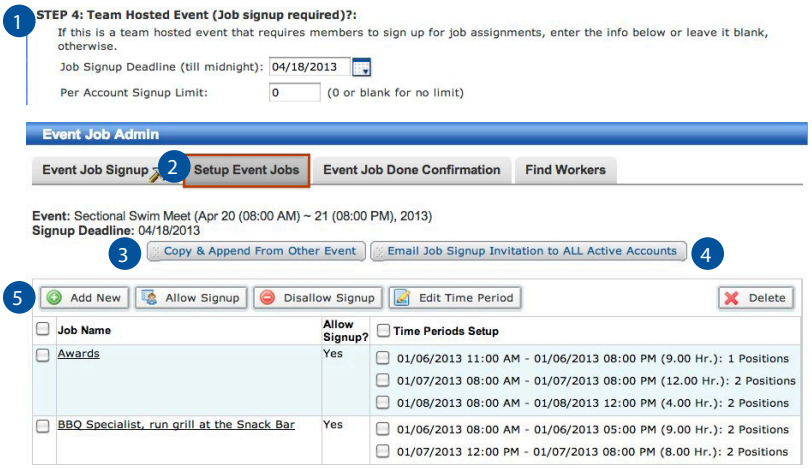
- How to set the date in an event to allow administration of the job system.
- How to copy/append a previously created job template.
- How to add a job. How to add a time slot and number of positions for a time slot.
- How to turn on your jobs for sign up.
- How to e-mail all of your signed-up members.
- How to know where you would generate a job sign up report for a specific time frame.
- How to apply the time worked against the accounts obligations.

Tutorial Job Setup Overview

Tutorial Signing Up Other Accounts

Tutorial Job Signup Reports

Job & Volunteer Sign-Up Management



Tips and Tricks

Create "buzz" around your job sign ups by designing awards for volunteers or build anticipation by creating "teaser" e-mail to countdown to their opening.

1. In order to begin a job sign up, within the event edit, step #4 you will need to populate it with a date (see screen shot below from the Event Creation Setup). Upon saving this event a job sign up button will appear allowing admin access into the job system.

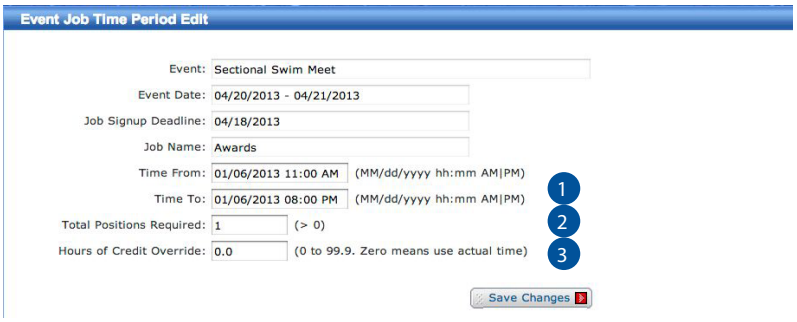
2. Always begin with the second Tab labeled Setup Event Jobs as below.

3. Copy & Append from other Event – click on this button and start by selecting Display All. The pre loaded meet will be your first selection to copy and append. Once you have created a meet with a job sign-up function, that meet will appear in the Copy and Append area in the future.

4. E-mail Job Sign up invitation to All Active Accounts – select this button to send a pre templated invitation to sign up for these jobs.

5. Add New – Select to add a new job. Begin by entering the job name and notes. Save event job changes. Once you have saved the job name it will bring you back out to the admin screen. Click on the job to add the time periods. These are critical to turning the system on.

Job & Service Hours Sign-Up Management



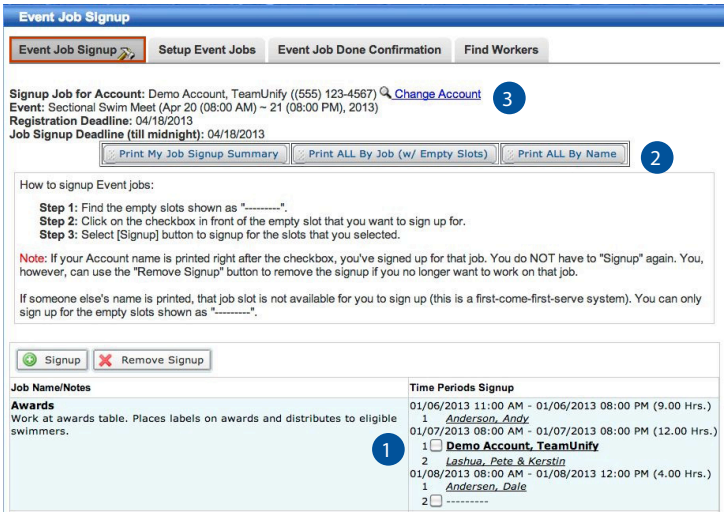
Tips and Tricks

Did you know that you can offer concessions to bring as a job. For instance, you could have a job called "water" and there are three position open for that job. Each position would be responsible to bring 24 bottles of water.

1. **Time from / Time to** - place the correct time the job starts and ends. The time will need to be entered exactly as stated with leading zeros is applicable.

2. **Total Positions Required** - How many positions will be available for this job

3. **Hours of Credit Override** - Enter in the number that will denote how many units this job is.



Tips and Tricks

Use the Change Account function to become any team member to sign them up to a job. This function is helpful to pre register for specific jobs.

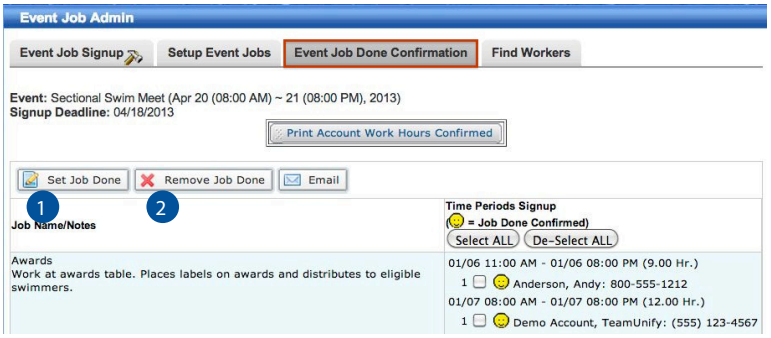
To see a list of jobs for accounts by date range for both accounts and admin go to your Events Tab < Reports Tab and use the admin reports. Accounts can use the account reports to view personal information.

1. Accounts will login and sign up by putting a check mark to the left of their desired job and selecting the button Sign up.

2. Use the Print outs for administrative help and the reports located under the Events tab for more admin information.

3. If you need to sign up an account use the Change Account function located to the right of your name in the Sign up Job for Account field.

Job & Service Hours Sign-Up Management



Tips and Tricks

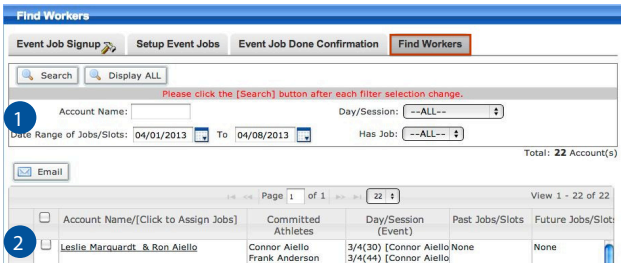
To send an e-mail reminder to your volunteers use this tab to select everyone and use the e-mail button.

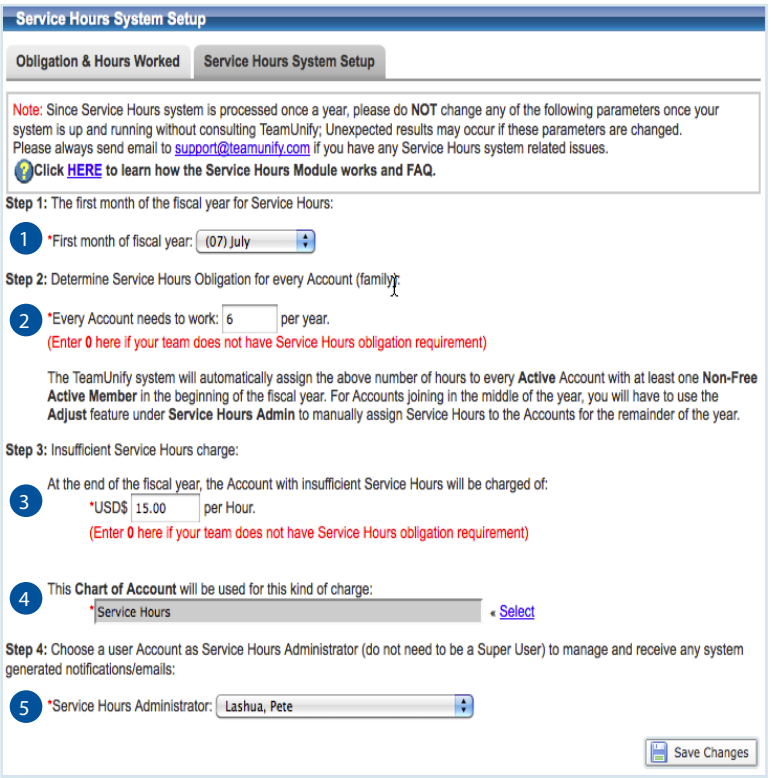
1. **Set Job Done** – When the event is done put a check mark to the left of each name or use the Select/De-select All button. Select the Set Job Done button to place the smiley face to the left of those that have completed their job. Once this piece has been completed the Service Hours module will be updated

2. **Remove Job Done** – Select this button if you need to remove an account from a job you previously set as done.

1. **Filters** - Set your filters to find those account to work the positions still open.

2. **Account Information** - Based on your filter selection, you will be able to select an account from this view and assign them to an open position.





Tips and Tricks

Did you know you can set and reset this module several times within the year? Just move Step 1: to the month you wish to bill and reset. Once the system has performed this action, move it to the next month for reset and invoicing. Ensure you complete Step 2 and Step 3 as needed.

Do you need to see a printout of the jobs worked? Generate the Excel export spreadsheet from the Obligation and Hours Worked Tab.

Job & Service Hours Sign-Up Management

Volunteer Administrative

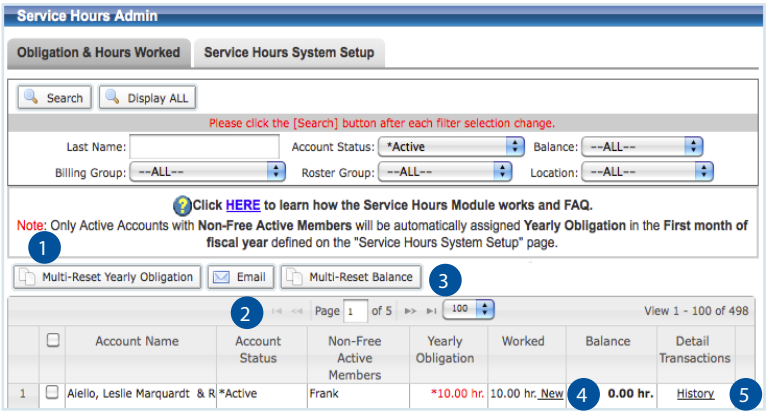
1. The first month of the fiscal year for Volunteer Hours: When you are first starting this system set the date to begin. Once the system begins you can change this month as deemed necessary. You can move this date as many times in a fiscal year as needed.

2. Determine Volunteer Hours Obligation for every Account (family): Set these hours to apply automatically based on Step 1.

3. Insufficient Volunteer Hours Charge: At the end of step 1 (upon the date selected), the system will create invoices based on the amount in step 2 and number of un-worked hours.

4. The chart of accounts: Use the select button to the right to ensure the dollars charged are put into a correct bucket of dollars for financial tracking.

5. You can choose a 'not an admin' person to track this system. They will only have access to this module. Otherwise, the user will need to be a SuperUser.



Tips and Tricks

Did you know you can use the Multi-Reset Yearly obligation to select multi accounts and set their obligation instead of waiting for the system to set. It's also useful if you need to apply different hours based on active members.

1. **Multi-Reset Yearly Obligation** – Use this to set the obligation. Remember this does not need to be for the year it can be seasonal. Use the System Setup to toggle the months to run multi times during a fiscal year.

2. **E-mail** – Select your accounts you need to communicate with and use the e-mail button to send a free from e-mail.

3. **Multi-Reset Balance** – If you need to reset the balance select your account[s], and then select the "Multi-Reset Balance".

4. **New** – the new link sits to the left of hours worked. Use this to manually adjust the hours worked by account. This is used for jobs not completed through the job setup system or adjusting job hours already sitting against an account.

5. **History** – the History link can be used to view previous jobs completed.

Job & Service Hours Sign-Up Management

Frequently Asked Questions

Q How many jobs can an account sign up for?

A Four. They may exit out and select the job button again and select four more jobs.

Q Can an admin sign up for another person's job?

A Yes, use the change account feature. This is also the same process for signing someone out of a job.

Q Can an account put someone else's name on the job instead of theirs?

A No.

Q How do I send out an e-mail reminder to those accounts signed up to work?

A Go to the event job done tab and select all accounts. Use the e-mail button to send a free form e-mail.

Q Can I set my volunteer system for session or by meet?

A Yes and No. The system is set exclusively for hours but if you are willing to manually place jobs done into the volunteer admin piece you can do this. Set everyone with the number of sessions they are required to work and manually apply those sessions against their account after the job is done.

Q I have set up my volunteer system now what?

A You will need to set up your job module. See the FAQ, Video Tutorial or PDF on job setup.

Q I don't use my billing system can I still use the volunteer modules?

A Yes the volunteer module/job sign up module is fully functioning but it will NOT produce invoices for any un-worked hours and it will not roll over. You will need to manually reset volunteer hours using the Manual reset obligation in the Obligation and hours worked to

Q How do my accounts view their volunteer information?

A When an account logs in with their login and password they can view their volunteer information in the volunteer tab located in the My Invoices/Payments area.

Q How do I use the Volunteer System to track sessions instead of hours?

A You will need to either convert your sessions to hours or use the job system, do not use the set job done function and manually enter your amounts using the new button function in the above module. You will need to manually set everyone's obligation to the session amount.

Other FAQ's that relate to this subject (login to your site and go to System > Help & Training tools for our Knowledge Base and Video Tutorials.

1. Job Sign up Reports
2. Job sign up – How many jobs can parents sign up for? -
3. Can Admin sign in members to jobs?

Best Practices

Retention & Performance Strategies

- Require your families to work a certain number of job hours per year. Charge for un-worked hours, even if it is $1 for each un-worked hour.

Speed

- Copy and Append from a prior event to add jobs into a new event. Then edit the list. The TeamUnify system remembers each event as a unique set of jobs that you can recall and use for future events.
- To expedite the filling of your jobs, add a "lousy" job like cleaning the bathrooms at the end of the meet. No one will want this job.

Communication

- E-mail often to your accounts asking for their help. 1-2 times per month.
- E-mail to your signed up members reminding them of their participation in the up coming event and thanking them for helping your team to be successful.

Polish

- Create a sub-menu under 'About Us' to explain the "Job Sign up" button and the expectations of your team.

Job & Service Hours Sign-Up Management

Notes

Team Profile

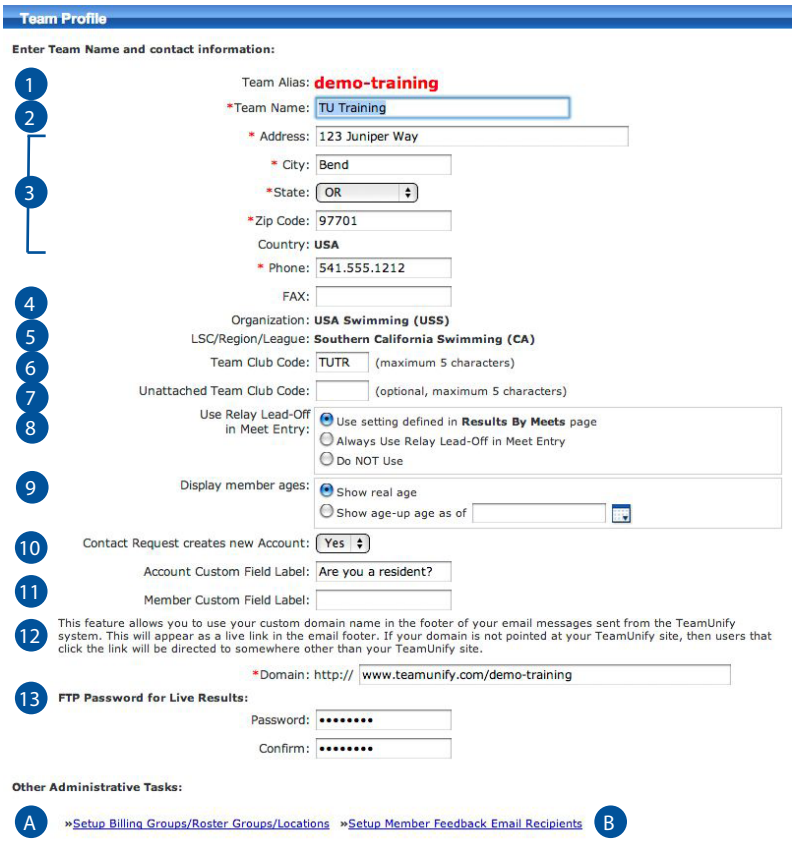
What you'll learn in this Section:

- How to confirm your team's information. For example what your team alias is for logging into OnDeck.
- How to setup a new Billing Groups/Roster Groups.
- How to set-up Locations (Super User function only).
- How to change who gets the contact e-mail E,g,. the member feedback e-mail recipients.
- How to remember what a sub-billing group is used for.

Tutorial

Team Profile Overview

Team Profile



Tips and Tricks

Did you know your team alias in red is also used in the sign in for OnDeck? Whenever you see reference to your alias this is what TU is talking about.

Did you know that if you use the lesson program you can manually set your button name in here?

Don't forget that MeetManager's (tm) live results login and password is set in here as well.

1. **Team Alias** – This alias denotes your team not only in your URL but also for OnDeck login functionality.
2. **Team Name:** Ensure you have this correct because it appears on your tab name on a Browser. If you change it, so does the tab viewable to the public.
3. **Address/City/State/Zip/Phone:** Ensure this is also correct as it will update on the TeamUnify side for contact purposes.
4. **Organization** – This needs to reflect who you are attached to for instance USA Swimming, AUS Swimming, CAN Swimming, REC Swimming etc.
5. **LSC/Region/League** – This reflects what umbrella organization you swim under.
6. **Team Club Code:** This is your team code that designates you within Meet Manager and USA Swimming, AUS Swimming, CAN Swimming etc.
7. **Unattached Team Club Code** – set this appropriately
8. **Use Relay lead-off in Meet Entry** – this option will globally set this selection.
9. **Display Member Ages** – If your team swims based on an age up date, set that date here and in account member admin < members tab you will now see a new column, 'age up date'.

Team Profile

10 **Account/Member Custom Field Label -** Place a custom field name that will be available in each Account. or Member profile. In addition you will be able to enforce or optionally ask for this field to be filled in during registration. You can use this for membership numbers for example. Once set, do not change unless you want to override.

11 **Swim Lessons Button** – If you are using the Swim Lesson Module you can set the name of the button in this field.

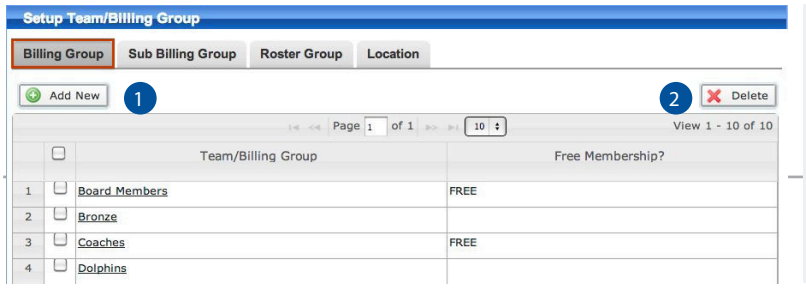
12 **FTP Password for Live Results -** Enter in the password from MeetManager(tm) for Live Results.

13 **Domain -** Place your full domain name in this field if it is directly connecting to your TeamUnify site. Do no use your domain name if it brings up another site and you link to your TU site or if you do not have one registered with a domain name company.

Other Administrative Tasks

A Setup Billing Groups/Roster Groups/Location – Select this to add/edit/delete your billing groups (amount to pay), Sub billing groups (how often to pay), Roster Group (what level they swim at), & Location (where they swim at).

B Setup Member Feedback E-mail Recipients – Ensure you select here to populate the feedback with the appropriate names to receive those e-mail sent through the Contact Us feature located both from the button on the top of your site and within the More Information button.



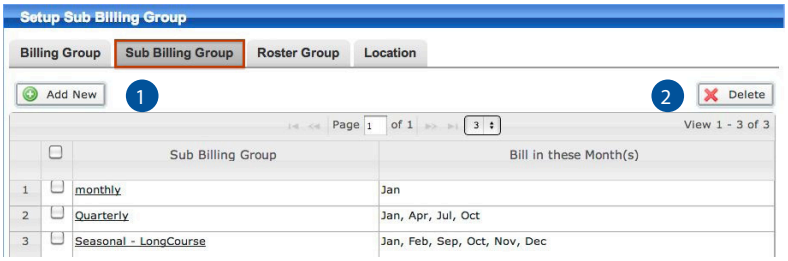
Tips and Tricks

Be descriptive! Make the Billing Group name as detailed as needed. This will help facilitate communication amongst team administrators and parents.

1 **Add New** – Use the Add New Button to add new billing groups. When you do this selection you will have the option of a normal or free billing group. This only applies to year round swim teams using the billing module. It's used to ensure BoD/Coaches do not get billing during the billing cycles. This does NOT mean their children will not be billed.

2 **Delete** – The system will not allow you to delete a billing group if any athletes are attached. Go to Account member Admin < Member tab and search by both all non – cancelled and Canceled/Hidden and ensure no members are attached if you receive an error. Once you have moved your members accordingly, you may try the delete selection again.

Team Profile



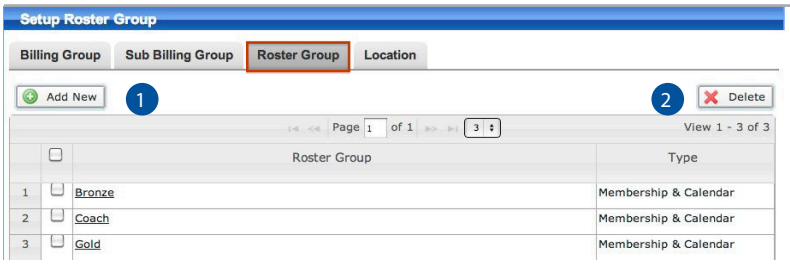
Tips and Tricks

Sub Billing Groups define 'when' a member should be billed.

Description is good! Name the groups after number of installments;Season, #/yr, etc.

1. Add New - Use the Add New Button to add sub billing groups. These groups are the frequency a member will pay for their dues. Select the months to bill and leave those months out that you do not bill for dues.

2. Delete – Put a check mark to the left of those groups you will not be using. The system will not allow you to delete a sub billing group in use.

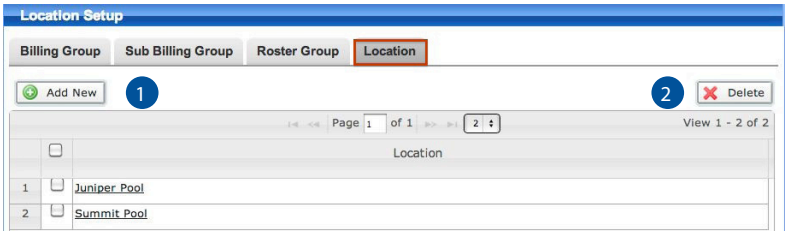


Tips and Tricks

Roster Groups will help your coaching staff organize your membership. Use as many groups as needed. Members are easy to move between groups, so feel free to experiment.

1. Add New – Use the add new button to add a new roster group. It will give you three selections:
   a. Membership & Calendar (Most commonly Used). This means they are a member and also you would like to add them as a calendar drop down.
   b. Calendar Only – This is a calendar drop down only (for instance Workout Calendar)
   c. Membership Only – This roster group only exists in membership admin but will not be available as a calendar drop down item.

2. Delete – Select and delete. The system will not let you delete a roster group in use.



Tips and Tricks

Locations are great way to separate membership among multiple pools... Only one pool? You can divide roster groups among multiple coaches using Locations. Simply setup a location per coach.

1. Add New – Use this button to add a new location

2. Delete – Use this button to delete a location. The system will not allow you to delete a location in use.

Team Profile

Frequently Asked Questions

Q How do I apply the billing group/sub billing group/Roster Group/Location?

A Go to Account member Admin < Members tab and select all of those accounts that you will be applying the same groups to Select the Multi –Edit button, put a check mark into the corresponding group and select your options to apply to all names. Save Changes.

Q Can the Billing Group and Roster Group be different?
Yes.

A The billing group denotes an amount of money an athletes will be paying for dues and the roster group denotes what level of swim group they are in. The billing group often times is the same.

Q Does the Location have to be a location? Can it be used for any filter option that makes sense?

A Yes. Some teams will use it to attach swimmers to a coach or to a time of year/season.

Other FAQ's that relate to this subject (Go to System > Help & Training Tools and launch the Knowledge Center).

1. What is my team alias?
2. Setting Member Feedback E-mail addresses
3. User Defined Fields

Best Practices

Retention & Performance Strategies

- Offer an 'Up Front' payment plan, in which families can pay for an entire season in one lump sum. This will improve cash flow, and encourage commitment to the entire season.

Speed

- Use your Roster/Location and Billing/Sub Billing Groups in your search queries. These are great ways to drill in on specific parts of your membership. This also helps fight 'Information Overload'

Team Profile

Notes

Online Registration

What you'll learn in this Section:

- How to access the registration system.
- How to create a new registration.
- How you enforce an age group for a registration Group.
- How you edit a registration group. How you add a new group.
- How to add an additional per member charge.
- How to opt out of a registration group from the multi-discount function.
- How to perform a registration test run.
- How to approve and assign pending registrations.
- How to read your Registration financial reports.

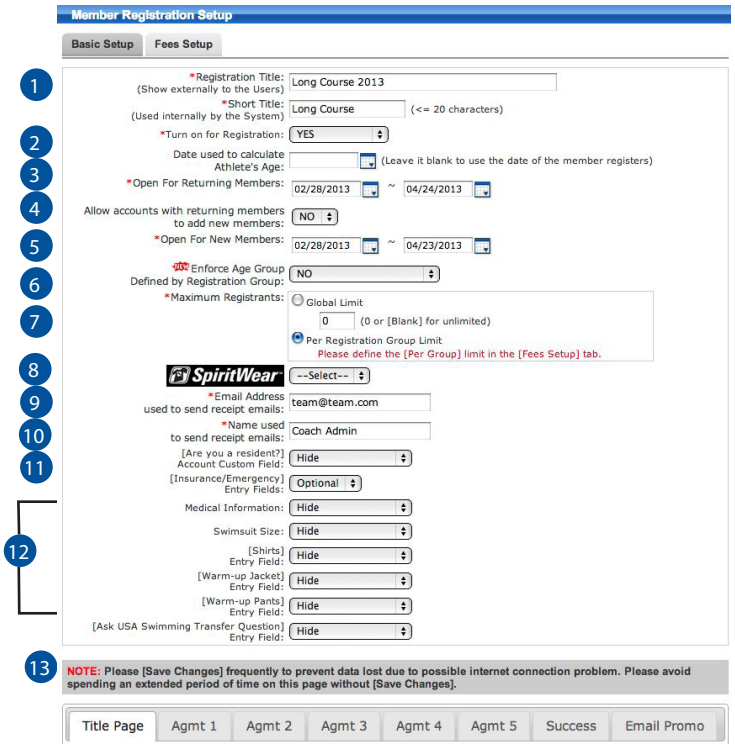
Tutorial A Day in the Life

Tutorial Step 1 - Starting a new registration

Tutorial Step 2 - Setting up options

Tutorial Step 3 - Fee Setup

Online Registration



Tips and Tricks

Did you know that you can run multiple registration systems by using the event reg piece. Try having families register for a BBQ or Christmas party.

Try using the event registration piece to handle a stroke clinic. Registrants do not need to be on the TeamUnify platform to sign up.

1. **Title of Registration/Short Title -** This will be public facing/Admin Facing

2. **Turn on for Registration -** Turns the registration system on and off

3. **Date use to calculate athlete's age -** This date is optional. You can use this to age up athletes for registration. For instance if today is April 1st and you set your age up for April 25th, everyone's birthday who falls on the 25th of April or before will be one year older for age group registrations.

4. **Open for returning members/Allow accounts with returning members to add new members -** What is the date that this registration system will open for members currently in your database (active, suspended or canceled/hidden). But if you toggle the 'allow accounts with returning members to add new members to 'YES' these accounts will be able to add both returning and new members regardless of the setting for returning members date.

5. **Open for New members -** What is the date that this registration system will open for new members including new members of an account already on the team (unless you toggle above to 'Yes').

6. **Enforce Age Group Defined by Registration Group -** If you say yes, you can enforce the age range allowed for registration groups. For instance if you say 10-12 then the athlete must be that age to register for that group or the system will error the registrant.

7. **Maximum registrants**
   - Global Limit – How many total team members will you allow before the registration closes.
   - Per Registration Group – how many members will be able to sign up for each registration group. The system will error the user if the maximum is met.

8. **SpiritWear -** Attach the corresponding SpiritWear store if applicable. See SpiritWear section for setup.

9. **E-mail address and Name used to send receipt e-mail** – this will be the e-mail and name of e-mail owner shown on the receipt that is sent to the registrant.

Online Registration

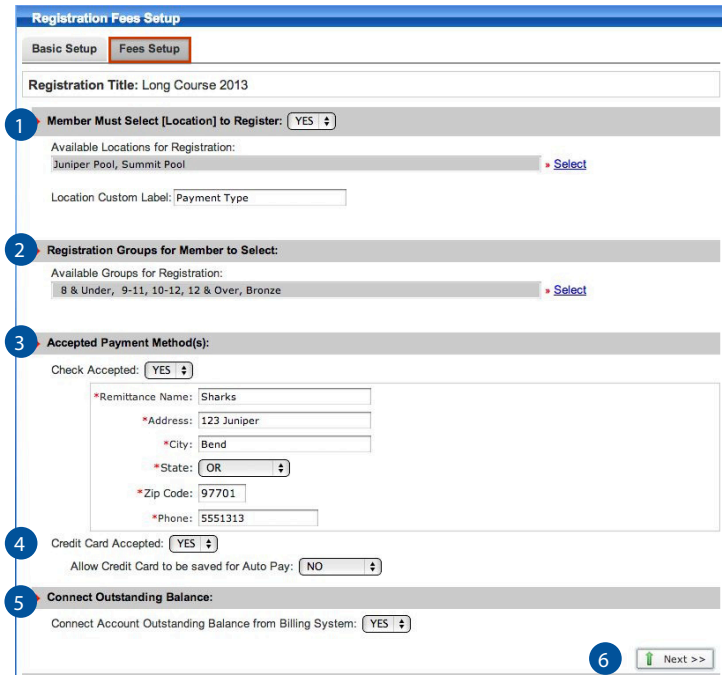
9 **User Defined Field** – Set the User Defined field name in TeamProfile. Use the drop downs to either enforce, show but optional or hide.

10 **Insurance/Emergency entry field** – optional/required. This will either enforce or not enforce the registrant to enter their insurance and emergency information.

11 **Swim Suit Size, Jackets, T-shirts, Warm ups, Medical Information, Ask USA Swimming Transfer Question** – optional/required/do not show

12 **Fill in the bottom tabs with your Title page, Waivers, & Success.** Fill in your Title page as the first page your registrants will see before they begin. You can copy and paste into each tab your official waivers and you can make these optional or enforced at checkout using the dropdown.

Save Changes. Once you save changes select the second Tab < Fees Setup



Tips and Tricks

Do you want to collect how often an account would like to pay? For instance annual, monthly etc? Create a Registration group for each option. For example; Blue Monthly, Blue Annual.

Do you just need to collect the same fee for everyone? Make one group called Swim Team.

1 **Members Must Select [Location] to Register** – Use this option to allow your accounts to sign-up not only by group but any User Defined category as well. For example Blue Group @ defined name A would be $80 and defined name B would be $100. This does not have to be different amounts but allows for member to select different user defined options. The label name shows for the public side.

2 **Registration Groups for Member to Select** – Use the select to the right to enable as many groups as needed. This can be as simple as having one group titled "Swim Team," or as complex as "Blue Group 8-9"/

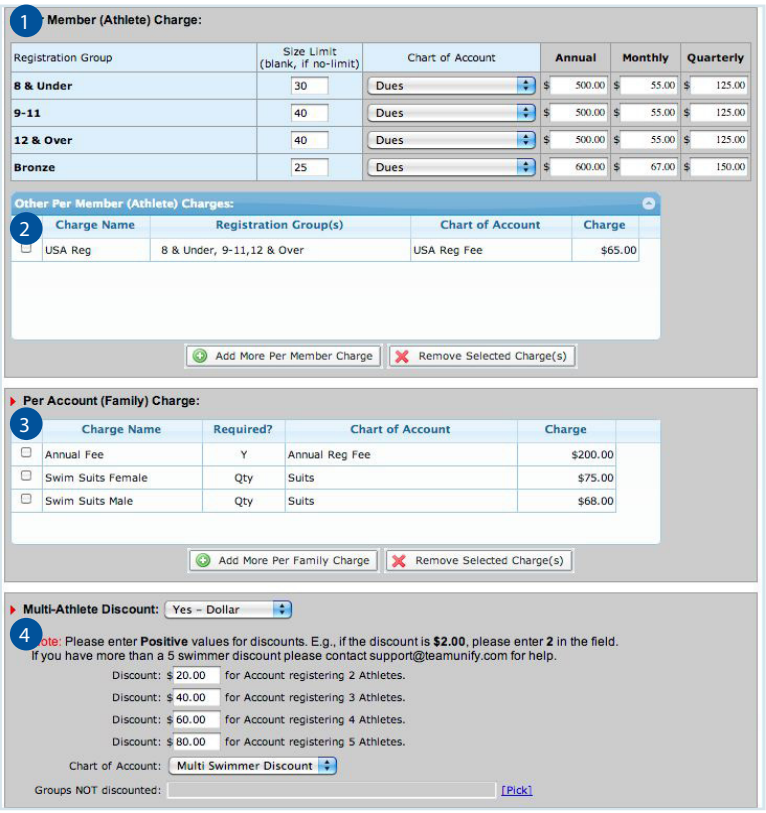
3 **Accepted Payment Method(s)** – You can select Checks only, Credit Cards only or both.

4 **Allow Credit Card to be saved for Auto Pay** - If you select yes, during the checkout the account will be able to designate that they would like the card used to update their AutoPay feature for the recurring billing system.

5 **Connect Account Outstanding Balance from Billing System** - Select Yes to enforce the account to pay their outstanding balance owed from the billing system at registration checkout.

6 **Next** - Select Next to move to the final fee setup screen and to save changes to current.

Online Registration



Tips and Tricks

Did you know you can collect additional fees by quantity? Try using the per family charge with a quantity in the amount. For example: 1 adult T-Shirt = $10.00 2 adult T-Shirts=$17.00 Have each selection as an optional charge.

Did you know you can opt out registration groups from the per member charge? When you create a charge nominate who it applies to. This works great for option out masters swimmers from paying the USA Reg fee.

Fees Setup

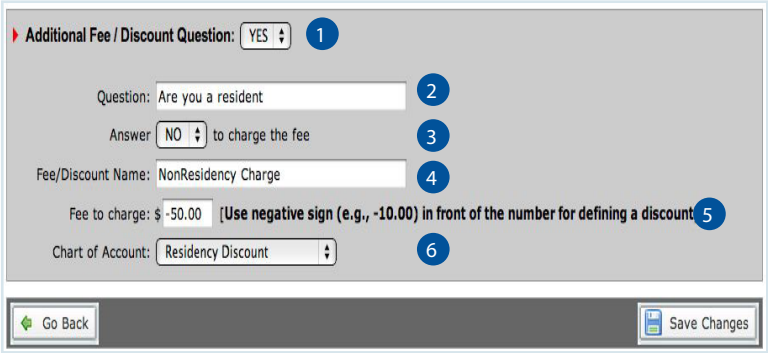
1. Per Member Charge – This is the calculated fee added to each member at checkout based on their selection during the registration process. Ensure you select a chart of accounts and enter in a dollar amount (this can be zero)

2. Other Per Member Charge – This is an additional charge applied to each member (athlete) at checkout. A more common charge is USA fee. This can be applied to one registration group, many or all.

3. Per Account (Family) Charge – this charge can be a required fee (annual registration fee), an optional fee (volunteer opt out charge) or a quantity amount (banquet tickets) applied at checkout regardless of how many athletes you have registered.

4. Multi-Athlete Discount – Yes/No (select dollar or percentage).
   1. **If yes - Dollar -** this can be applied to one, many or all member registration groups. This discount needs to be calculated based on the registration groups. For instance if you give $20 discount on multi athletes then the 2nd child would be $20, 3rd would be $40, 4th would be $60 etc. For EXAMPLE - Three kids are registered then the account gets a TOTAL of $40 discount. No calculation! Flat fee.
   2. **If yes - Percentage -** this will take a percentage off of the total dollar amount calculated from registration group fees only. If you have 20% for 3rd child discount then the system will add up dues for instance $200 total and take 20% off **bottom line** or $40 total discount.

Online Registration



Tips and Tricks

The additional fee/discount is a great way to apply special charges/discounts to specific accounts. For instance, if you have a non -membership dollar amount that must be paid in addition to the regular fee, use this feature to apply.

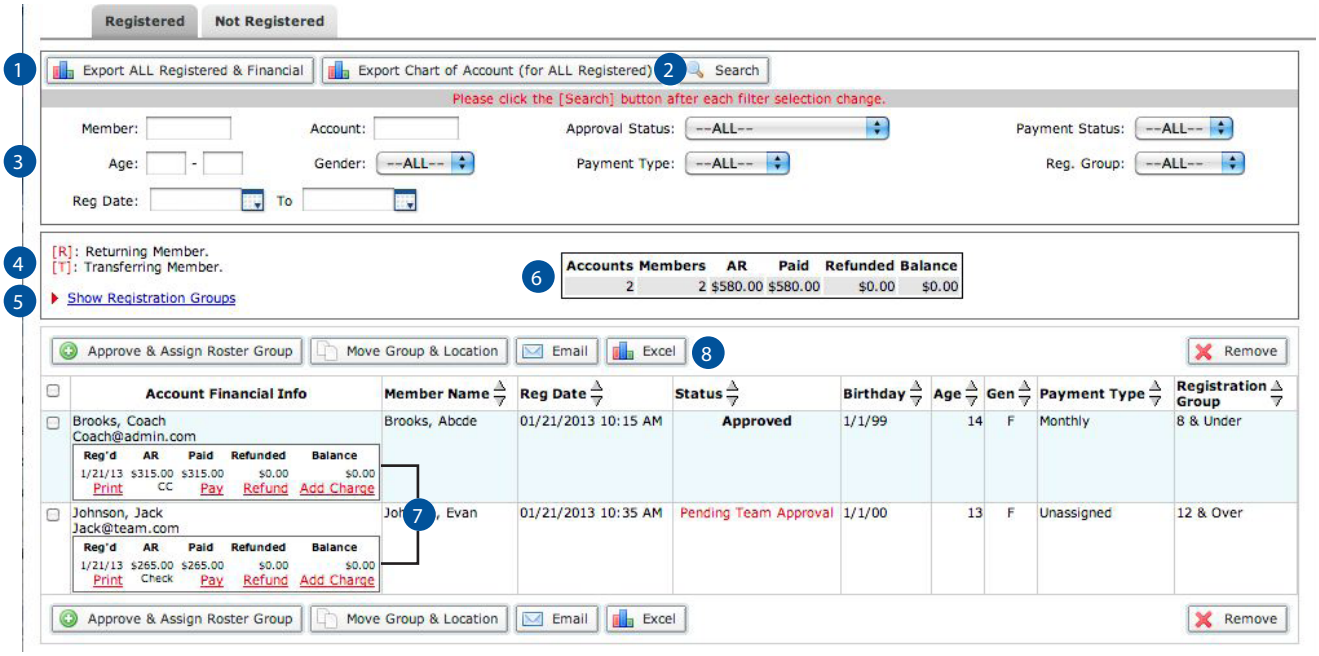
1. **Additional Fee/Question** - Toggle to Yes to turn this function on.
2. **Question** - Type in the question that your accounts will see once they select their checkout payment type. For instance, "Are you a resident?"
3. **Answer** - Select Yes/No as the answer that will implement the fee/discount at checkout. For instance if I select "NO" for the answer above, I will get the fee/discount applied at checkout.
4. **Fee/Discount Name** - This will be the line item on Checkout and on the invoice. In our example above, "NonResidency Charge" would show on the checkout page with the dollar amount applied/discounted.
5. **Fee to Charge** - Place your fee or discount (denoted with a negative symbol) in this field.
6. **Chart of Account** - Use the pull down to apply the chart of accounts to track your dollars.

Save Changes

Testing Your Registration System

1. Ensure all of your dates in the setup are set to open up today.
2. Turn the System off in the Registration Setup Tab
3. Ensure you Set it as current from the first screen (Registration Admin<Set as registered)
4. Begin your registration by clicking on the Start Registration/Off button located under the sign in button. Only Super Users can test this functionality.

Online Registration



1. **Export All Registered & Financial** – Use this Excel report to view all information including account information, CoA details and also the IP address for the signed waivers.

2. **Export Chart of Accounts [for all registered]** – Use this report for a summary of all monies collected.

3. **Filter Set** – Use the filters to find specific Accounts/Members

4. **[R] [T]: Returning/Transfer Members** – Returning or transfer athlete and if blank they are new.

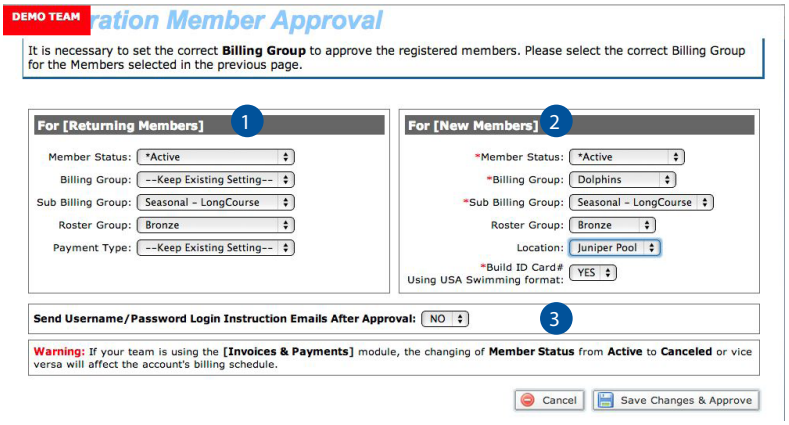
5. **Show Registration Groups** – This not only shows what registration groups are available but will also show you how many slots are left if you have enforced this option in the setup.

6. **Summary -** This summary will be based on your search filters and give you a summary of accounts, members, and your financials. REMEMBER your check payers will not calculate in your financials until you have set them as paid.

7. **Managing your payments -** Select Pay to pay and update a check paying account or to apply a partial payment. Once you select Pay, you will be asked to enter in the check #, amount and a memo if applicable. Once they have paid by check or credit card, a refund button will also be available. Credit Card refunds will be automatically refunded to the card without any further intervention from the administrator.

8. **Excel -** Make your filter selection, press search and use the Excel to generate a report based on this filter set. The report will include all information and financials.

Online Registration



Tips and Tricks

You can multi select your athletes and approve & assign in one push. You can also do new members if they belong in the same billing groups/roster groups, etc.

Approve & Assign Roster Groups – Once you make your selection the view below shows.

1. For [Returning Members] – either leave the switches as "keep existing" to keep the same settings as what is currently set in your account/member admin area. TeamUnify suggests getting your account member admin < members area ready for the next season so you can leave this as all default.

2. For [New Members] – Toggle the switches accordingly to push your new members into the correct groups.

3. Send Username/password Login instruction E-mail After Approval – Only use this function for new families.

Best Practices

Retention & Performance Strategies

- Online registration is easy to administer and will save massive amounts of time. Online registration eliminates the need for administrators to print, deliver and gather paper.

- Allow returning accounts/swimmers to register first and new families follow. This creates a feel that your current members are a priority and gets those that are thinking of joining that your team takes care of it's families.

Speed

- Leverage credit card processing to further reduce administrator time and dramatically improve cash-flow.

Communication

- Use E-mail Center for announcing the new registration.

- Send a series of scheduled e-mails as a "countdown" to create excitement.
  -10 days until registration is open
  -5 days until registration is open
  -Only 1 day until registration is open
  -Registration is now open. Come on and join the fun!

Polish

- Add a picture/image to the registration Title Page for branding and professionalism.

- Make the registration name descriptive and fun.

- Add the same visual polish to the "Success Page" thanking them for their registration.

Online Registration

Notes

Swim Meet Entries

What you'll learn in this Section:

- How to load an event file into an event from Meet Manager™.
- How to update the event file to only allow parents to sign up their kids by day and session instead of event.
- How to enforce maximum entries for individual events.
- How to enter your committed athletes into the events using the Quick Entries System.
- How to enter a relay team using the Auto Find option.
- How to run an eligibility report.
- How to generate your Meet Manager entry files.

Tutorial Meet Entries Overview

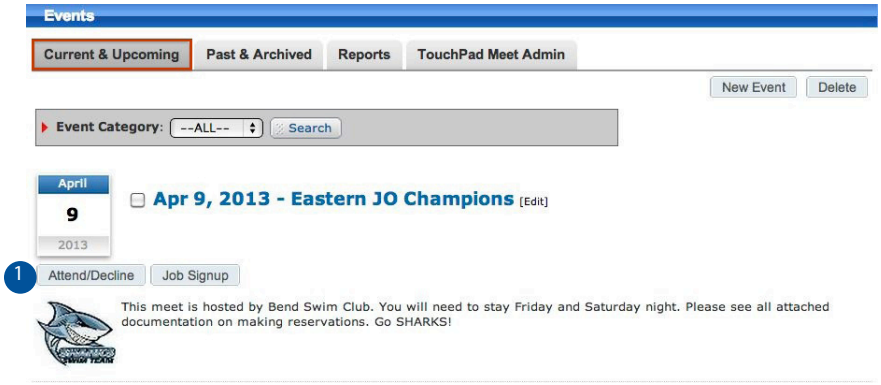
Tutorial Viewing and Editing your Event File

Tutorial Using the Quick Entries Functionality

Tutorial Entering Relays

OnDeck Check Ins using OnDeck and TouchPad

Swim Meet Entries

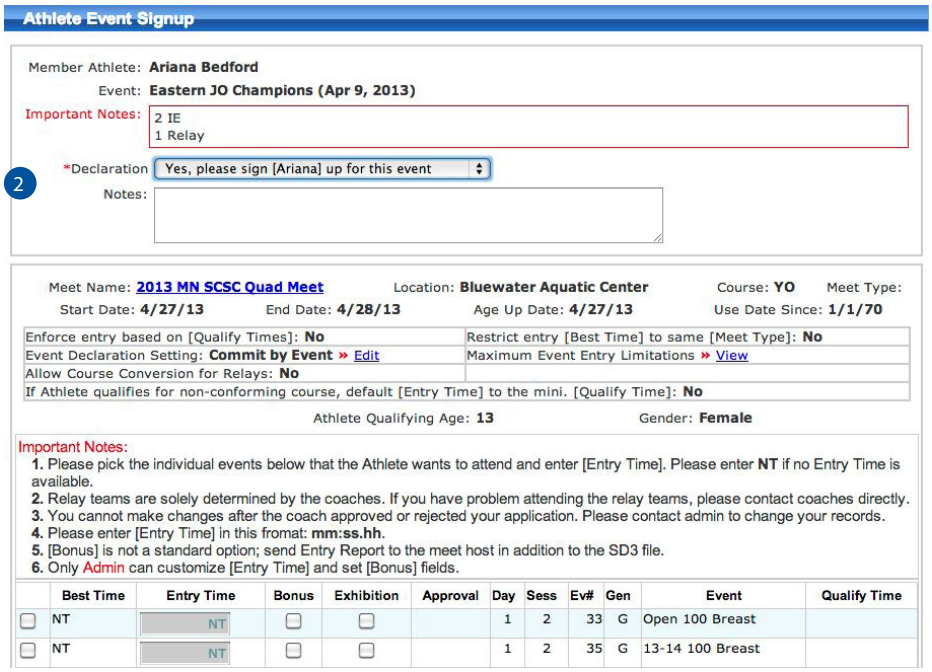


Tips and Tricks

Did you know that parents can view the events their children have been approved to swim by selecting this button once coaches have finalized their decisions.

1 **Attend this Event** – Once the user clicks Attend this Event the following steps will be followed. Step one will be your parents or your admin to click on the Attend this Event Button. This is the portal into both parent sign-up and event administration.

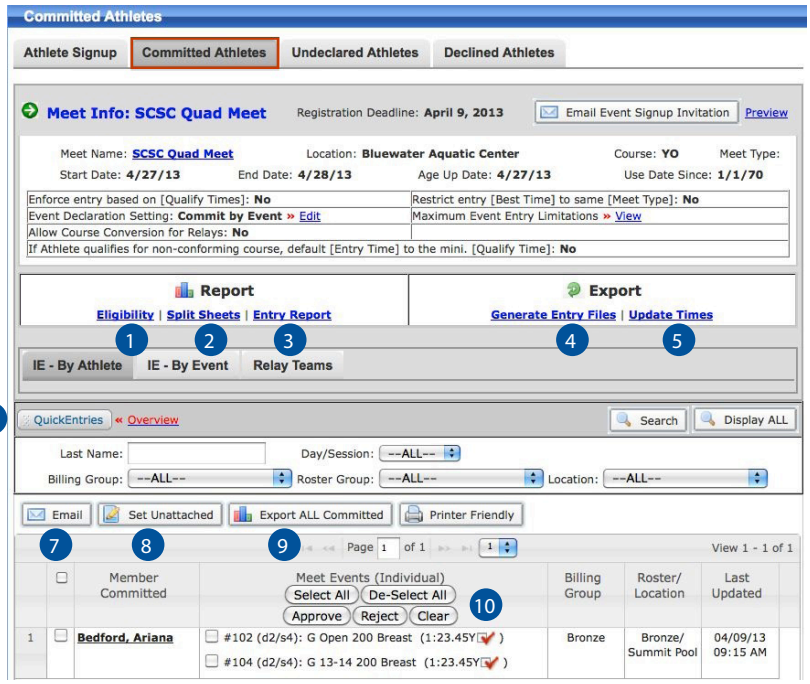
Parents View After they Hit Attend this Event they see the following screen shot below.



2 **Athlete Event Signup** - Account View after the account selects the button 'Attend this Event'.

A parent will see all necessary information regarding this event on this page. Only events and sessions that an athlete qualifies for will appear for selection purposes.

Swim Meet Entries



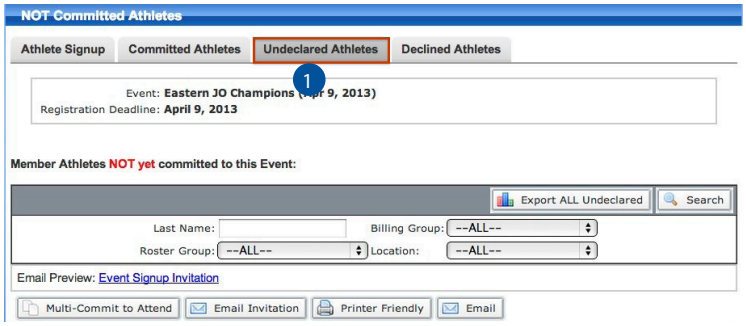
Tips and Tricks

Use the E-mail Event Invitation button to e-mail specific groups of athletes only. This is good for your reminder e-mail if you don't want it to go to all active accounts.

Use the Update Best Times button **ONLY** if your athletes have entered an event before final times have been loaded.

1. Eligibility – Use this button and the corresponding filters to generate your eligibility report.
2. Split Sheets – The split sheet button gives you options for split sheet generation. TeamUnify suggest using OnDeck instead for a paperless coaching experience.
3. Entry Report – This selection generates the entry report in PDF format.
4. Generate Entry Files – This button generates your MeetManager file to be e-mailed to the host, your fees reports and your excel file for meet fees to be brought back into the invoicing system for billing purposes.
5. Update Best Times – This button is used ONLY if a results have been loaded after athletes have entered a meet. As long as no athletes have been attached to events this button is not needed. Remember this is an integrated database that won't auto update times once an athlete is attached to them in event entry.
6. QuickEntries (see quickentries below) – This button is used to quickly place athletes into their events.
7. E-mail – Select your athletes putting a check mark in the box to the left of the name or selecting all and using the e-mail button for a free form e-mail.
8. (Un)Attach - Place a check mark to the left of the athlete and select this button to set as unattached (UN).
9. Export All Committed – This button can be misleading. It exports your athletes in an Excel file only and is not to be sent to the Host for use with MeetManager. It's most useful feature is that it contains any notes that a parent may have written during the sign up process. It's also useful if you do not have an event file loaded into this meet and you are using the event sign up for a Yes/No feature only.
10. Approve/Reject/Clear – These three buttons all rely on the selection of athletes. Use the Select-All button or individually select by putting a check mark to the left each event and selecting one of these buttons. The Reject button will ensure the file sent to the host is correct. If an event says reject then that event will not be loaded into the file.

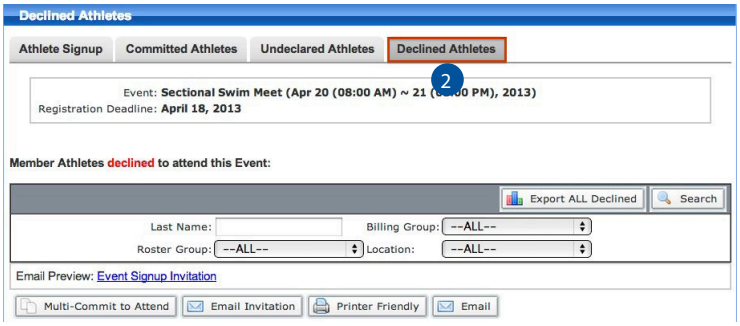
Swim Meet Entries



Tips and Tricks

Select all athletes and use the E-mail invitation button to remind them it's time to commit.

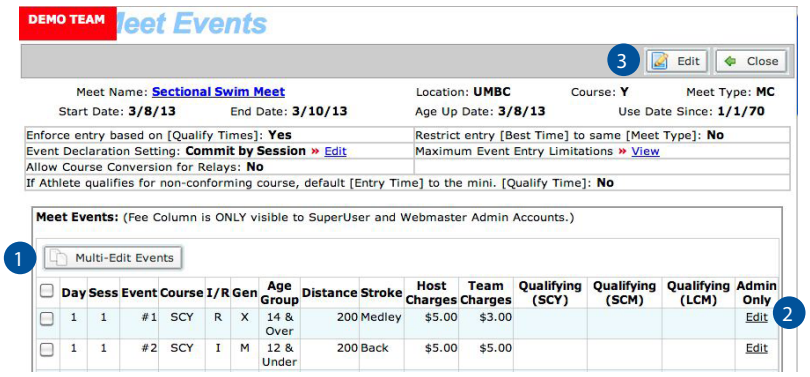
1 **Undeclared Athletes Tab** - All athletes will appear here who have not committed or declined to this event meaning no action has been taken. Use your options to help administer this event for instance multi commit athletes to attend or select all and re-send the invitation.



Tips and Tricks

Select the Export all Declined button to see the athlete's notes why they will not be attending.

2 **Declined Athletes Tab** - All athletes that have replied that they will not be able to commit to this event will appear in this tab.



Tips and Tricks

Almost all instances where TU does not seem to be entering athletes as normal, points to a problem with the event file and not the software. Confirm the file is set correctly by carefully checking the file parameters.

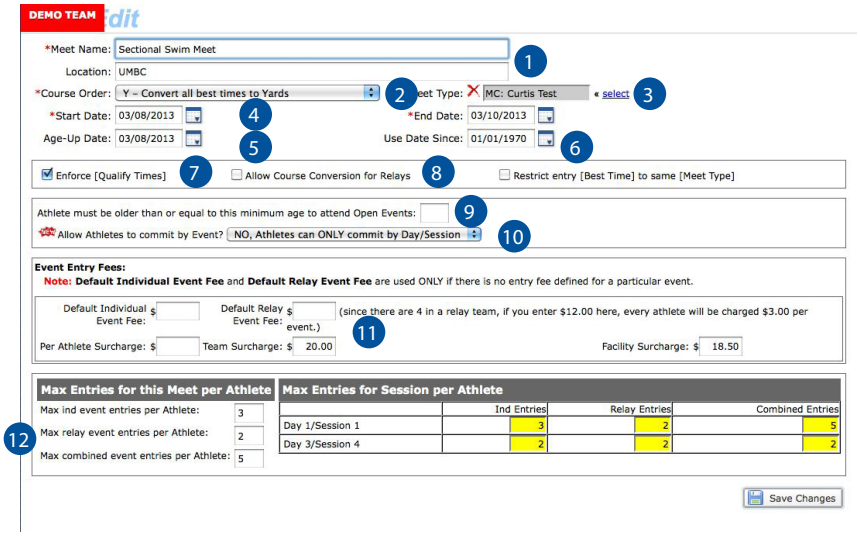
Event File Edit – This Screen is accessed in many places. Most common is selecting the button View/Edit Event File from the Athlete Sign up Tab when you first select the button 'Attend this Event'.

1 **Multi-Edit Events** – Either multi select your events by placing a check mark to the left of each event or select all by placing a check mark to the left of the column header, 'Day'. Select this button and update any necessary fields as deemed necessary by the host. Remember, if you change these fields and the host does not, MeetManager WILL reject your file.

2 **The Edit** to the right of each event allows optional changes such as event stroke, distance, gender. The edit to the right is for parameters that cannot be set in a multi edit function and that are event # specific.

3 **Edit** (upper right) – This edit allows adjustments of the file for instance course order and other parameters for instance signup by day/session or event.

Swim Meet Entries



Tips and Tricks

Set all of these parameters carefully as they apply to the entire meet file. Generally, if the sign up does not appear to be attaching times to athletes correctly, the error can be found and fixed within this screen.

1. **Meet Name/Location** – This information should auto populate from the event entry file but can be updated here. Please note if you make a change here, MM may reject your event entry file.

2. **Course Order** – MM sets the parameters but they can be changed using the course order toggle. For more information on what each order means, please see the FAQ: Multi Cut.

3. **Type** – You can set meet types in Results by Meets to ensure you do not use times that are not sanctioned for this meet. Use the select to the right to implement.

4. **Start/End Date** – The start and end date for this event.

5. **Age Up Date** – MM sets this date but if it's wrong, it can age all athletes incorrectly. Ensure it's the first date of the meet for year round and the correct age up date for seasonal teams.

6. **Use Date Since** – For year round teams ensure this date goes back to the beginning of historical times to grab all best times. For seasonal, ensure it's set as the start of your season if applicable.

7. **Enforce (qualify times)** – Select this box if you need to ensure only athletes with qualifying times can complete. Qualifying times must be stated in the event file to work.

8. **Allow athletes for non conforming course, default [Entry Time] to the minimum [Qualify Time]** – Place a check mark in this box if this meet conforms to the above.

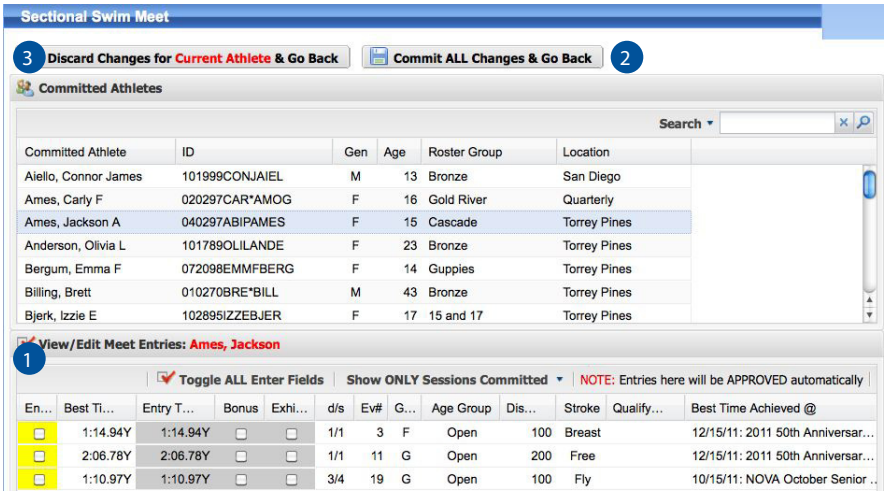
9. **Athlete must be older than or equal to this minimum age to attend open events** – Place an age in this box if a minimum age exists for this meet otherwise leave blank.

10. **Allow Athletes to commit by Event?** No, Athletes can ONLY commit by Day/Session or Yes,Commit by Event. Please select the option that applies to your team. Enforces during the "attend this event" selection on the public facing side.

11. **Event Entry Fees** - These are set by MM and do not have any bearing on your TU invoicing.

12. **Max Entries for this Meet per Athlete/Per Session per Athlete** - Set these parameters and it will be enforced on the public side and also alert the coach on the admin side.

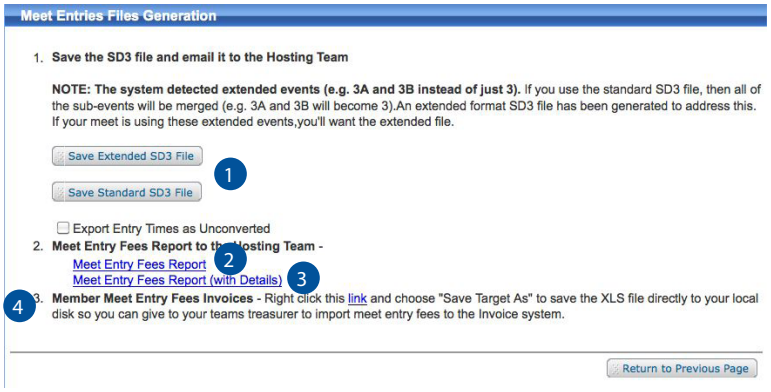
Swim Meet Entries



Tips and Tricks

Did you know that you can select the down arrow to the right of most columns to change the sort? In addition you can select which columns you would like to view.

1. **Event Selection** - Put a check mark to the left of each event under the column header, 'Enter', to select that event for the athlete to swim.
2. **Commit All Changes & Go Back** – Select this button to commit and approve all event entries.
3. **Discard Changes for Current Athlete & Go Back** – This will discard any updates and go back.

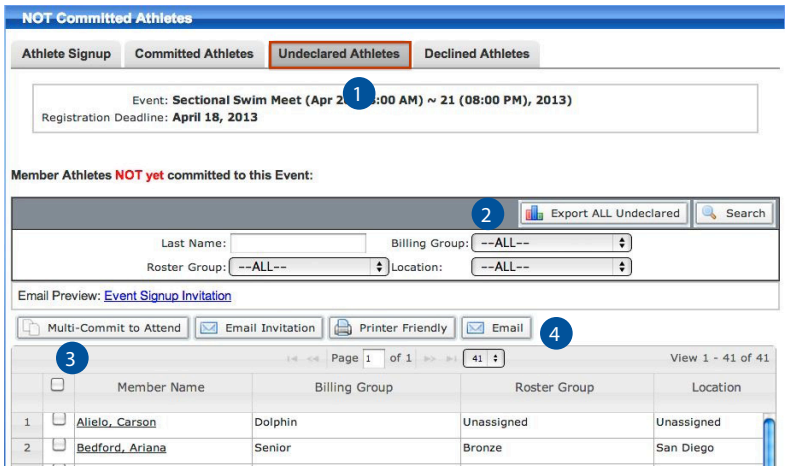


Tips and Tricks

Did you know an extended SD3 file button will appear if you are swimming in a meet that contains number/letter event combinations.

1. **Save Standard or Extended SD3 File** – Select this button to generate your event entry file to be e-mailed to the host of the meet for import into MeetManager.
2. **Meet Entry Fees Report** – Click on this to save the entry fees report.
3. **Meet Entry Fees Report (Details)** – Click on this to save a detailed report of the fees.
4. **Member Meet Entry Fees Invoice** – Right click on the word 'Link' to save the excel spreadsheet to be imported into your invoicing system for billing of meet fees.

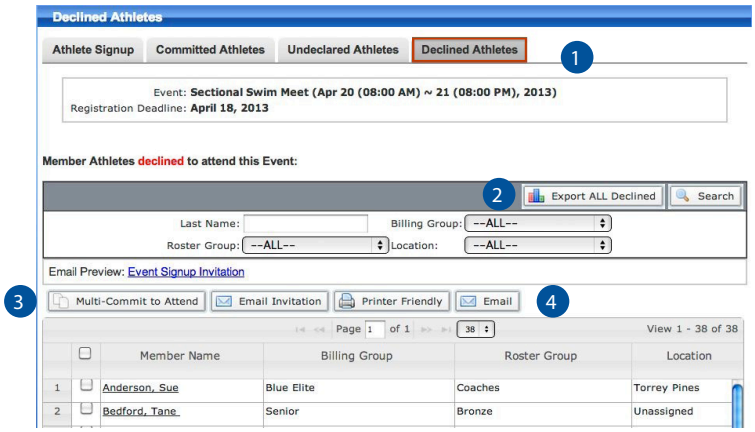
Swim Meet Entries



Tips and Tricks

To send an e-mail invitation to only those athletes that have not committed either as a yes/no, use the filter 'Replied Online' = NO and select Search.

1. **Undeclared Athlete** -All athletes contained within this tab have not declared or declined to this event. No action has been taken.
2. **Export all Not Committed** – Export All Not Committed in Excel Format.
3. **Multi-Commit to Attend** – Select one or many athletes and this button to place the athlete(s) into the committed tab to place into the meet.
4. **E-mail Invitation** – Select your athletes that you need to send an e-mail reminder to. Use the Replied Online Search to send to those athletes that have not yet declared their intention. See tips and tricks.



Tips and Tricks

Don't forget to check the Declined athlete tab and export the 'Export all Declined' Excel spreadsheet to see the reason for declining to the meet.

1. **Declined Athlete** -All athletes contained within this tab have declined to this event.
2. **Export all Declined** – Export All Declined in Excel Format.
3. **Multi-Commit to Attend** – Select one or many athletes and this button to place the athlete(s) into the committed tab to place into the meet.
4. **E-mail Invitation/Email** – Select your athletes that you need to send an e-mail reminder to or just a free-form email.

Swim Meet Entries

Frequently Asked Questions

Q I am using the auto find in the relay section and athletes that I know have committed and should be swimming the legs are not appearing

A Check the max entries for this event. Confirm that the athlete has not already met their max entries or the combined max entries per athlete. You will have to adjust this number to bring in those athletes that have surpassed this number.

Q Why do some of the athletes appear to have the wrong age?

A Check the age up field to ensure it's set to the current month and year.

Q Why is the system allowing athletes to sign up for events they are not qualified for?

A Ensure you have check marked the 'Enforce Qualifying Times' box.

Q We have open events but I don't want any age to be able to swim. How can I enforce this?

A Place an age in the field for enforcing of a minimum age to qualify to open events.

Q I selected an athlete and no times are showing.

A Occasionally an admin sets the event file setup as sign up by day/session or by event after the sign ups have started. When this happens the times do not appear for those athletes that did not have that option to select. To the right of the 'Toggle All Enter Fields' another button will appear, 'Show All events'. Select the down arrow and choose all to show those events and times.

Q Why am I missing some athletes?

A The quick entries only shows those athletes that have committed to swim.

Q Why am I not seeing the latest results?

A If an athlete signs up before the latest results have been posted or you haven't posted those results you need to post results and select the button, 'Update Best Times' from the committed athletes tab.

Other FAQ's that relate to this subject (go to System, Help & Training Tools and launch your Knowledge Center)

1. Generating a Meet Entries Report.
2. Configuring/Editing the Meet File
3. Using the Quickentries system
4. Creating a Relay

Best Practices

Retention & Performance Strategies

- Leverage the meet declaration system and require your swimmers to commit to each event using TU. Make rules that if a swimmer does not commit, they will not be able to deck enter late at the meet. Enforce your rules and stay consistent.

Speed

- Use "Quick Entries" to experience fast entry creation.
- Use OnDeck for swim meet entry management.
- Leverage TeamUnify's online power by requiring your coaches to enter their own swimmers into each meet. This engages your coaches and ensures they are aware of each swimmer committed to each event.

Communication

- E-mail to your families, once entries are completed, to sign into their account and view their approved entries.
- Post the Event Entry Report PDF on your site, under a logged in tab, so your families can see who is swimming what event.
- Add events to Facebook via OnDeck to drive awareness of your team's accomplishments. [Coming soon]

Polish

- E-mail to your families once entries are completed to sign into their account and view the approved entries
- Add events to Facebook via OnDeck to drive awareness

Swim Meet Entries

Notes

Swim Meet Results

What you'll learn in this Section:

- How to change your account identity to see a parent's view of their child's times?
- How to compare standards in My Results/Meet Results/Results by Athlete
- How to manually edit/add/delete times?
- How manually add a meet? Add a time?
- How to Import a Result?
- How to look up the top ten times for your 10-12 Male athletes for LCM/ 50 free?

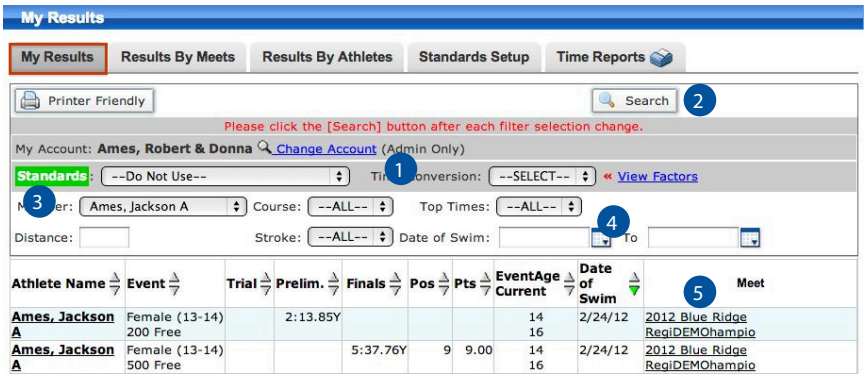
Tutorial Swim Meet Results Overview

Tutorial Creating your Records

Tutorial Adding and Editing Meet Results

OnDeck Timing Meets with OnDeck

Swim Meet Results



Tips and Tricks

Use the change account function to become any account on the team and view their children's times. This is helpful if a parent is questioning times or if you need to walk them through this function.

My Results Tab is for all non admin users to see their children's times

1. **My Account:** change account function to search and select any parent in the database and see their view of their athlete's times.

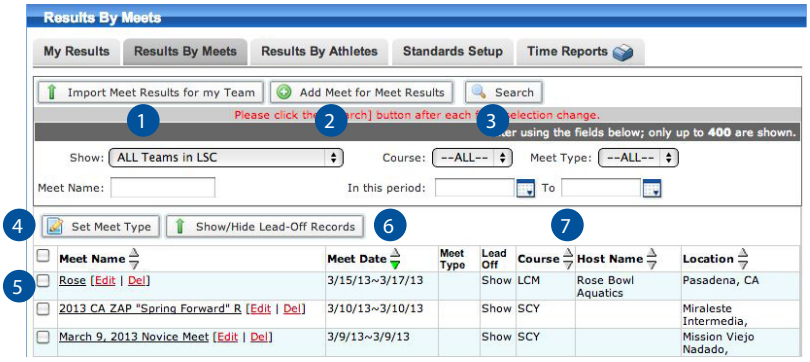
2. **Search:** Ensure you select Search after each selection especially as you select a new athlete.

3. **Standard:** Use the drop down to apply a standard and search. The system will show the athlete's times and how close they are or if they have surpassed a standard.

4. **Use the filters** to search for specific information. Use the Printer Friendly button to print out the screen view.

5. Parents can select the meet on the right using the clickable link. This link will show them the results for that meet. This is the same view an admin sees in the tab, 'Meet Results'.

Swim Meet Results

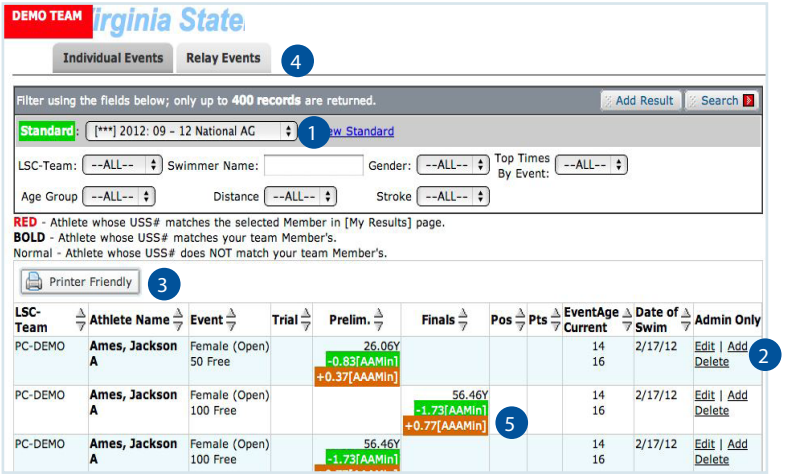


Tips and Tricks

Did you know you can set meet types (for ex: high- school) to separate official USA times from non official times. Put a check mark to the left of the meet and select, 'Set Meet Type'. Fill in the appropriate information. When you enter meets this will ensure those times do not apply.

1. **Import Meet Results for my Team** – Select this button to bring in your results file in either .Zip, SD3 or CL2 format.
2. **Add Meet for Meet Results** – Select this button to manually enter a meet and meet results into the system.
3. **Search** – After you set your filters below ensure you select search to apply.
4. **Set Meet Type** – Use this selection to set a meet as a non official meet. This ensures that those times do not integrate with your official times. Put a check mark to the left of the meet and select set meet type to apply. You can do multi meets at one time.
5. **Select the Meet** (it's a clickable link) to view the results of the meet. You can edit, add, and delete times in this view.
6. **Show/Hide Lead-Off Records** – You can select all meets or individual meets to set this option.
7. **Up/Down Arrows on column headers** – Use the up/down arrows to sort by that particular column in ascending or descending order.

Swim Meet Results



Tips and Tricks

Did you know that all of your current, active athletes show in Bold? If they aren't in bold, but they are part of your team, their USA# is not attaching correctly and needs to be fixed.

Did you know you can use the up/down arrows on the column headers to sort by ascending/ descending.

Meet Results

1. Standard - To see how these times compared to the current standards, set the standard and any additional filter and select Search in the upper right to apply.

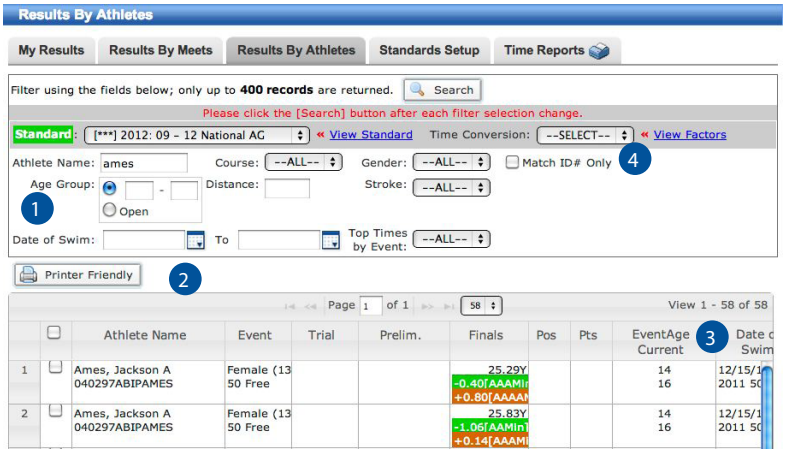
2. Edit/Add/Delete – Use this options carefully. They will edit/add or delete a current time in the system. Ensure you are 100% sure this is the correct function. If you note that when entering a meet a rogue time keeps appearing, this is where you could adjust that time to stop attaching.

3. Printer Friendly – Use the filters to show you a page that has the pertinent data and select the printer friendly button to print or put into a PDF.

4. Relay Event Tab – This tab contains the relays. You can also edit times and athletes attached to relays within this tab. This is helpful if a lead off leg is incorrect. Lead off legs are noted with a blue L in the individual event tab.

5. Standard Designators - The green shows the standard that has been met with the time positive time difference and brown shows how far from the next standard this athlete's time is.

Swim Meet Results



Tips and Tricks

The filter 'Athlete Name:' works using a "fuzzy logic". This means if you put the fist two letters of the last name and select search it will find all related matches.

1. **Filters** – Set your filters accordingly to retrieve the pertinent data. You will only see current athletes on the team.

2. **Printer Friendly** – Use the filters to view the information needed and select the printer friendly button to either print the view or send to PDF.

3. **Up/Down arrows** – use the arrows on the column header to sort your data by that selection.

4. **Match ID# Only** - Use this selection to bring up an athlete's times regardless of which team they swam on or if they were unattached at the time.

Frequently Asked Questions

Q How can a parent view their child's standards?

A Use the Standard pull time and select search. The system will show the parents how close their child is to achieving a standard or how many seconds better than a standard they are.

Q Why does the area below the filters tell me there are no times associated with that USA #?

A There are two reasons you will see this. 1) that athlete has no times and 2) the athlete's USA# is not matching the USA# that is in the database. To confirm this is the case go Results by Athletes Tab and search for this athlete. Take note of the USA# that is in this database and compare to the member profile. If the error is in the profile fix the USA # and the times will automatically attach. If the error is in the times database you will need to tell support@teamunify what the old USA # is and what the new # is and they will merge. Why do I see other team's results?

Q Why do I see other team's results?

A The TeamUnify times database is an integrated online database that allows team's to see other team's results that exist in the same league or LSC. Times are not considered private and may be viewed by other teams. When an athlete transfers to your team, as long as their times exist in the TU database, once you enter them into your database their times will auto attach.

Swim Meet Results

Frequently Asked Questions

Q **If I delete a meet will it delete off all other TU team sites?**

A This will only happen if you were the only team to upload those results. If another team or an LSC/ League site uploaded those results as well, that meet will remain.

Q **I uploaded a meet and it attached itself to another meet so all times are within the same meet. Why did this happen?**

A The TU database looks at the name of the meet and date of the meet. If this criteria is the same, the system believes this to be the same meet. Change the name of the meet in MeetManager to have it upload separately.

Q **I see the time, it's my athlete, they are on my team but I can't edit/add or delete. Why not?**

A This will occur if the meet results were not loaded in by your team. It could be a load from your league/ LSC. Please contact support@teamunify.com to change or you can contact your League/LSC if they are on the TU platform.

Q **Why are some of my athletes missing? I know they swam.**

A Generally there is something wrong with the results file. Let support@teamunify.com know what athletes are missing and attach the results file to the e-mail.

Other FAQ's that relate to this subject (go to FAQ on your site and type in these solution #'s).

1. What order are my Meet Results Sorting in
2. Why do I see other team's results
3. What is the Blue L after my swimmer's time
4. Can I get Live Results from Meet Manger ™ onto my TeamUnify site?
5. How do I create a record for an athlete not in my member database?
6. If the USA # is wrong, how do I merge athlete's times
7. Delete Meet Results and Re-import

Best Practices

Retention & Performance Strategies

- Create buzz around uploading results to the site. This will drive your Families to login. Upload results soon after the meet and create updated records using that fresh data.

- Keep your results current. Make meet entries easier and will keep you parents more engaged with their child's progress.

Speed

- Search filters are key. Use the filters under Results by Athletes to create a lightning fast Top Times Report and use a one button push to update your site.

Communication

- Drive your families to the My Results section and encourage them to view their swimmers' results against Time Standards. This is a great way to let them know their competitive standing on the team.

- Make your parents aware that the results have been updated and where they are available.

Polish

- Hosting a Meet? Contact TeamUnify to help you setup Live Results upload from Hy-Tek Meet Manager software. This will allow anyone involved with the meet to instantly view the latest heat's results, via a web browser.

- Verify the accuracy of the results and easily make the needed edits. This will serve as a critical need when you enter the swimmer in the next meet. Improved best times accuracy improve how you interact and report/review time while using OnDeck Mobile Coach.

Notes

Time Reports

What you'll learn in this Section:

- How to generate your team's records.
- How to easily publish your team records to a records tab.
- How to generate your team's top ten times for your current active roster.
- How to generate your team records to a UserDefined records tab.
- How to generate your current, active athletes top times for each event.
- How to generate your improvement labels.

Tutorial Time Reports and Creating Records

Tutorial Creating Top Times Reports

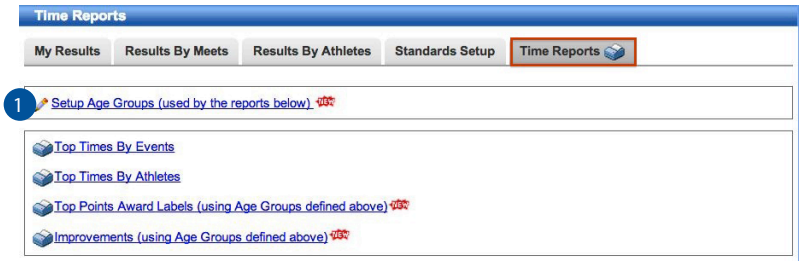
Time Reports

Time reports have many valuable functions, from maintaining historical records, to creating improvement labels for ribbons. These instructions will start by showing how to create your own logic for these reports, and then how to create a tab for your top times.

1. Creating Historical Records
    1. Go to Website Design
    2. Find the Type of Tab called Tab_Records_Swim and click on the Tab label to edit.
    3. Rename it for your needs and ensure it's not hidden and ordered for your view.
    4. In addition, create tabs for other records for example: Top 10 times.
2. Go to the Tab that you just un-hid or renamed and click on it. This is your view:

3. Select the Edit/New/Delete button –TU suggest creating these records for ease of use: SCM, SCY, LCM and that is it. Do not create a record for each group as the system has a good filtering availability to your accounts to find what they need.

4. Once you have created your records go the My Meet Results < Time Reports

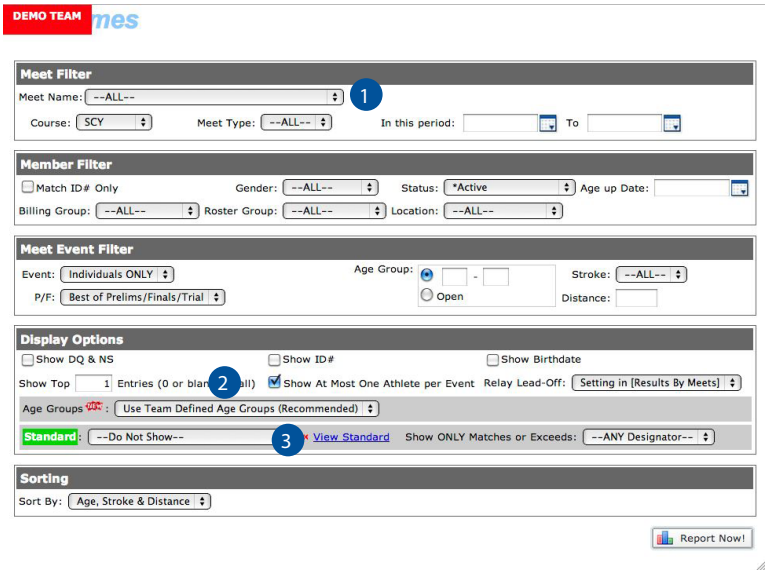


Tips and Tricks

Did you know TeamUnify has a powerful records reporting feature? Ensure your **tab type TAB_Records_Swim** is open for viewing and you have created a record type using the new button within the tab. You can now push your team records to this tab using the top times by events selection.

1 Setup Age Group (used by the reports) – The system will use the age groups defined in the meet results unless you define how your team sees records. Select this link and use the Add Button.

Time Reports



Tips and Tricks

If you set your unattached code under TeamProfile, you will be able to bring these results into your reports.

Use the option, "Match ID# Only" to bring all records in regardless of whether the record was set on another team or while unattached.

Top Times by Events

1. Use the filters to find what you are looking for as far as reports. The status, when set to –ALL- will show all accounts in your database regardless of current status (active, suspended, cancelled). A good option for historical records.

2. In the Fourth Filter set, 'Display Options' use the Show top ___ Entries (0 for blank or all) put in the number for the places. For example 1 for top 1 time, 10 for top 10 times.

3. Select your Standard Drop down if needed and the matches or exceeds. Select Report Now to generate your report.

Time Reports

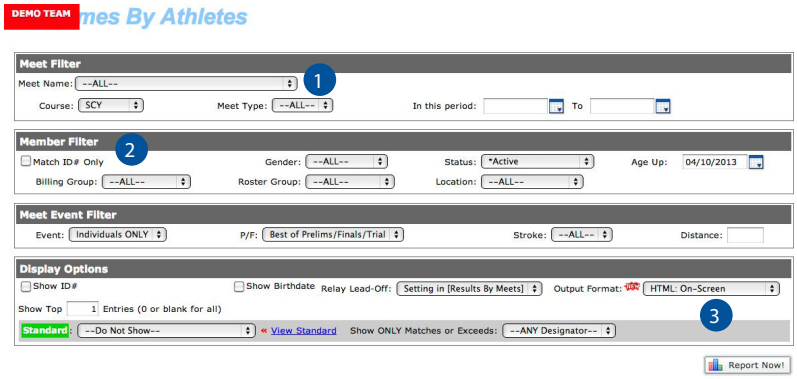
Tips and Tricks

Did you know that your browser has its own powerful search function? Use Ctrl-F to begin this search function allowing you to find specific athletes within a large report.

4 **Save As HTML / Save as XLS** – Use these button to save the document to your computer. The HTML is the format needed to place back into your site if needed.

5 **Snapshot & Overwrite a [User_Defined] Tab** – Use the drop down to select a Tab that was created in web-site design. For instance 'Top Current Times'. Once you select your Tab, Select the button to push the information into that tab.

6 **Snapshot and Overwrite a Record** – From the dropdown select the record you created at the beginning of these instructions. For instance: SCY. Select the button and the records will update.



Tips and Tricks

Did you know that you can print one page off per athlete? If you include the Standard filter, you now have a great way to show your athlete what their times are and what standard they are achieving.

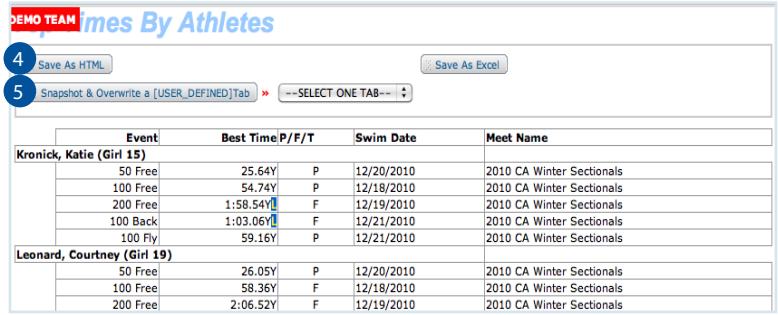
Top Times by Athletes

1 **Meet Name** – This dropdown is used to show best time at this meet and is generally set to –all-.

2 **Filters** – use the rest of the filters to report the necessary information by athlete. Use the Match ID# only to bring in all records regardless of what team that record was set on.

3 **OUTPUT Format** – please note this times report has three different output formats: HTML: On-Screen, PDF:Listing, PDF:One Athlete per page. Select the correct Output and press Report Now.

Time Reports



	Event	Best Time	P/F/T	Swim Date	Meet Name
Kronick, Katie (Girl 15)					
	50 Free	25.64Y	P	12/20/2010	2010 CA Winter Sectionals
	100 Free	54.74Y	P	12/18/2010	2010 CA Winter Sectionals
	200 Free	1:58.54Y	F	12/19/2010	2010 CA Winter Sectionals
	100 Back	1:03.06Y	F	12/21/2010	2010 CA Winter Sectionals
	100 Fly	59.16Y	P	12/21/2010	2010 CA Winter Sectionals
Leonard, Courtney (Girl 19)					
	50 Free	26.05Y	P	12/20/2010	2010 CA Winter Sectionals
	100 Free	58.36Y	F	12/18/2010	2010 CA Winter Sectionals
	200 Free	2:06.52Y	F	12/19/2010	2010 CA Winter Sectionals

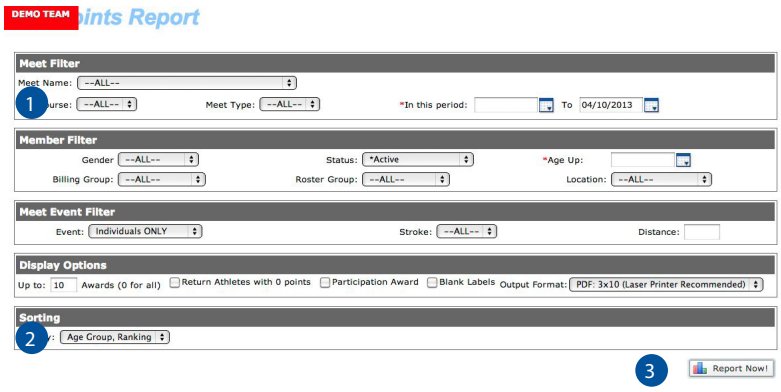
Tips and Tricks

Did you know that you can print this out in an Excel spreadsheet to allow you to manipulate the data or to show only certain aspects of this report? Use the Excel button in the upper right.

Top Times by Events

4 Save As HTML / Save as XLS – Use these button to save the document to your computer. The HTML is the format needed to place back into your site if needed.

5 Snapshot & Overwrite a [User_Defined] Tab – Use the drop down to select a Tab that was created in website design. For instance 'Top Athlete's Times'. Once you select your Tab, Select the button to push the information into that tab for viewing.



Tips and Tricks

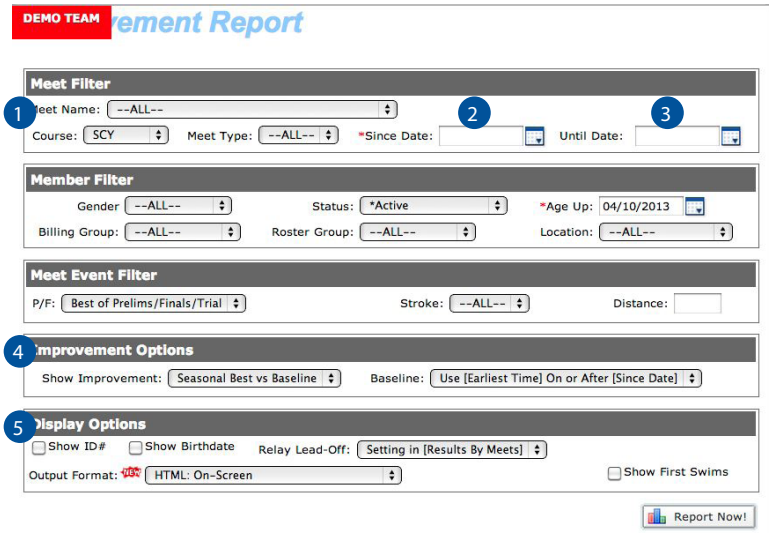
Use your top points report to continually show your swimmers how well their season is progressing. You can use the display options and set it to zero to ensure you are rewarding all of your athletes.

1 Meet Filters - Use the filters to find what you are looking for as far as reports. The status, when set to –ALL- will show all accounts in your database regardless of current status (active, suspended, cancelled).

2 Display Options Filter – This is the option that tells the system how many places to show points for.

3 Select Report now – The report will be a PDF: 3x10 report for label generation.

Time Reports



Improvement Report

Tips and Tricks

Did you know that you can view improvements for a specific meet? Use the meet name drop down selection to choose your meet and the until date as your meet date. Set your baseline to "selected" meet and run your report.

1. **Meet Name** - Use this dropdown if you want to show improvements using a specific meet as a baseline (this can be common for seasonal teams).

2. **Since Date** - This date is when you want the system to begin it's improvement comparison and is required.

3. **Until Date** - This date is when you want the comparison to stop and is not required.

4. **Improvement Options**:
   a. Seasonal Best vs Baseline – This means it will find your best time and compare it to your baseline. Your baseline can be:
      i. Use [Earliest Time] on or After [Since Date]. This means that the system will find the first time you swam an event on or after the since date and compare it to your seasonal best to see if you have improved.
      ii. Selected Meet – This means the system will find the first time you swam an event based on the since date and compare it to the meet you selected in the dropdown to see if you have improved. This is a nice comparison for improvement labels. You can show improvements every meet.
      iii. Use [Best Time] before [Since Date] – the means the system will start with the since date and look backwards for the best time for an event. Once it finds this time it will compare it to all meets swam since then to see if and when they improved.
   b. Every Meet vs Baseline – The system uses the same logic above except it will show every meet and if there was an improvement (or not an improvement) for each meet.
   c. Meet vs Meet – The system will show every meet and compare it to the meet before it for improvements.

5. **Output Format** – Use the dropdown to create the needed output. Use the PDF 3x10 output for labels. For instance: SCY. Select the button and the records will update.

Time Reports

Frequently Asked Questions

Q I generated my top times records report and I did not see all of our athletes that historically hold records. Why is that?

A Did you set your status to –all-? If you are still not seeing these records there is a chance these athletes do not exist in your system or your results do not go far enough back. First go to account member admin < members and search for these athletes using all statuses. If you see them and not their records go to My Meet Results < Results by Meets to ensure you have old enough records. If they aren't in the account database they will need to be added to attach. IF the results aren't there you will need to add them manually or send TeamUnify an updated database with all historical results.

Q How can I generate my improvement labels to place on ribbons?

A Within the improvement label function, there is the option to output by PDF 3x10. This will organize a document in label format. Place your label sheet in your printer (3x10) and print.

Time Reports

Notes

Best Practices

- **Retention & Performance Strategies**

  Update records often. The Top Times reports make it easy to post an updated record after each meet. Make an announcement after posting an updated record, to drive traffic to your site.

- **Speed**

  Use the powerful TeamUnify functionality to easily push your records to your site. Use the logic built record tab to push your team records and create user defined tabs to quickly push your current team records.

- **Communication**

  To err is human. Results can be mis-entered. Your parents are great watchdogs. Enlist their help, and keep open communication lines to help catch result inaccuracies.

- **Polish**

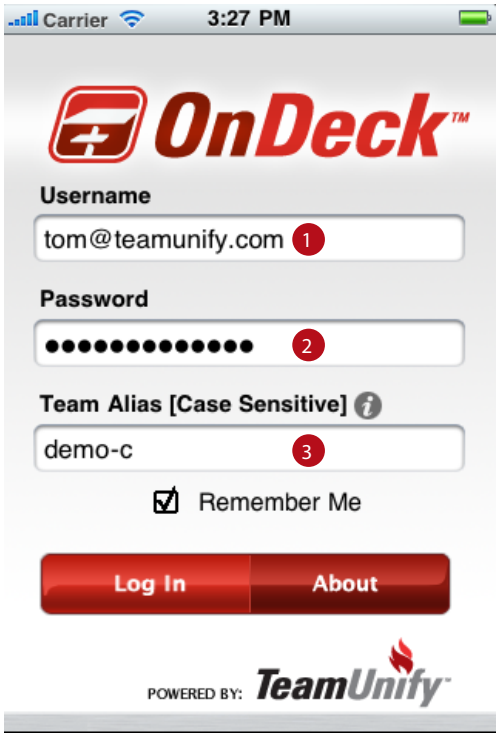
  Maintain a consistent convention on upper/lowercase letters in your Member data (Member/Athlete Profile). Discourage mixing ALL CAPS names with First Letter Capitalized names. This will make your Time Reports and Records look clean.

OnDeck™

Set-up Basics

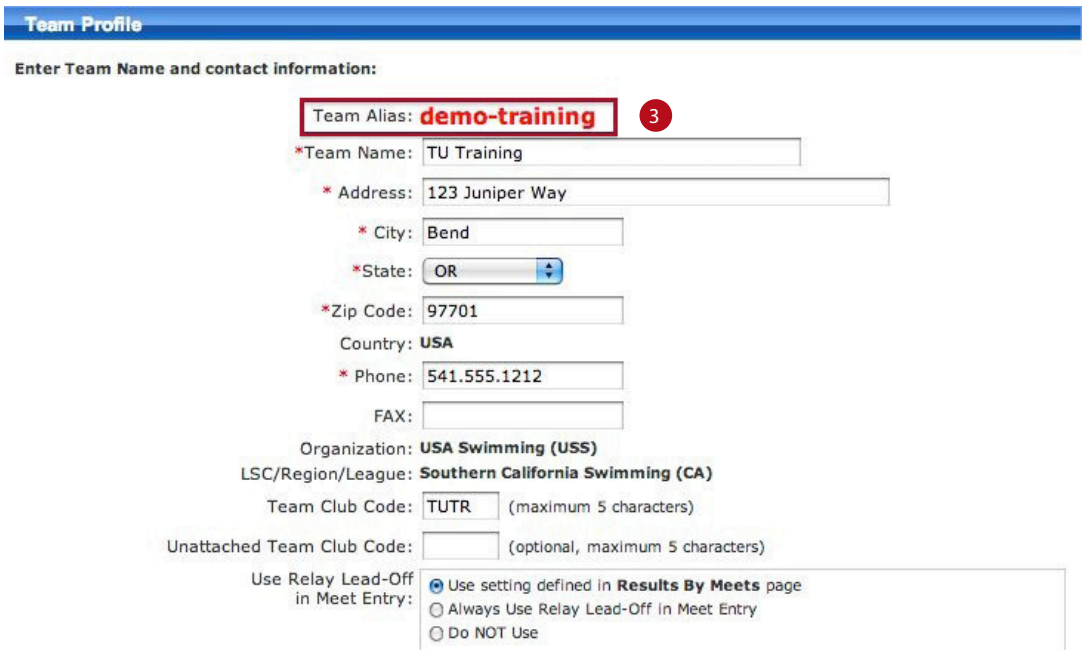
What you'll learn in this Section:

- Setting the General device preferences
- Creating customized views
- Tutorial OnDeck Overview
- Tutorial OnDeck Preferences Management

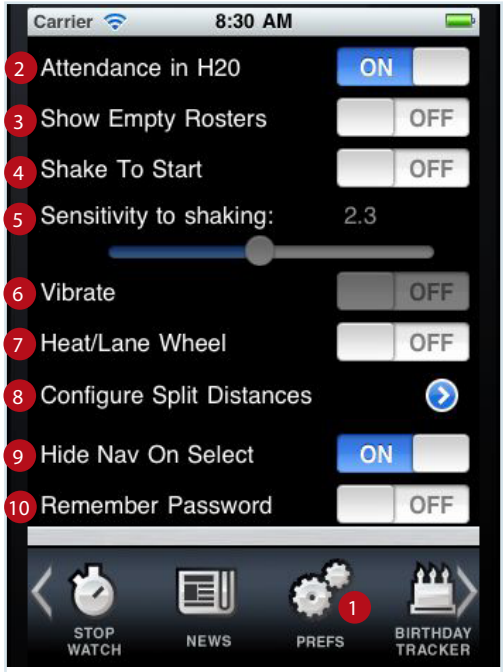


Signing into OnDeck

1. **Username** - This will be the email address you use to sign into your SwimOffice account
2. **Password** - This will be the password you use to sign into you SwimOffice account
3. **Team Alias** - This is your team alias; you can find this by going to the Team Admin menu in SwimOffice and clicking on Team Profile. Your team alias is at the top in red (see screenshot below).



Set-up Basics



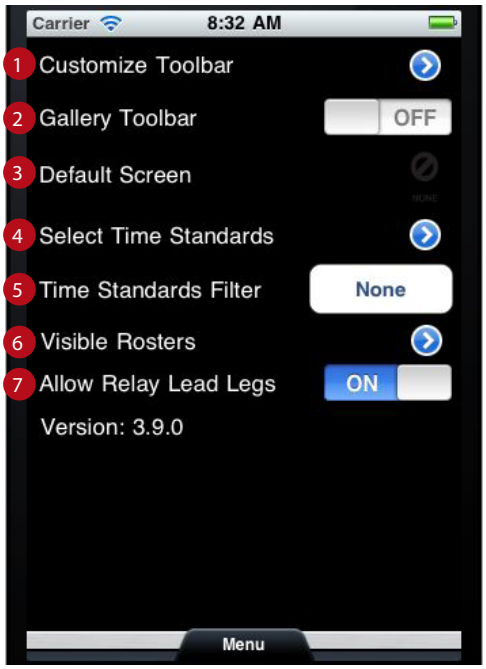
Tips and Tricks

Did you know you can choose to have only your roster groups shown when taking attendance? This cuts down on scrolling and makes for more efficient attendance taking.

If you select remember password be sure to set the password functionality on the device to on. This way you have to put a password in to access the device.

1. **Prefs Icon** - Tap Prefs to access the preferences menu
2. **Attendance in H20** - Turning this feature to ON to default all athletes to be 'IN' the water for attendance. When it is OFF, all athletes will default to being out of the water
3. **Show Empty Rosters**- Show/Hide roster groups that are empty when taking attendance
4. **Shake to Start** - Turn shake to start to ON and shaking the device will start timing a race
5. **Sensitivity to shaking** - When you select "Shake to Start" this sets the amount of force you need to start the stopwatch. TeamUnify suggests between 2.2-2.4 for an optimal setting.
6. **Vibrate** - Set your device to vibrate each time the lap key is tapped.
7. **Heat/Lane Wheel** - This will change back to a wheel selection process instead of buttons when selecting heat and lane for athletes.
8. **Configure Split Distances** - This will allow you change the Distance at which you record a lap for both SCY or LCM. (See Figure A on following page)
9. **Hide Nav on Select** - When turned on this will hide the Nav bar at the bottom after you have selected a function. When OFF the Nav bar will always be visible
10. **Remember Password** - When selected this will remember your login and password information. (Beware if you lose your device your team's information might be compromised).

Set-up Basics



Tips and Tricks

Many admins forget to set their time standard selection which means they aren't using the power of OnDeck. Standards are used throughout OnDeck to help you navigate your athlete's progress.

Customizing your toolbar is a great way to ensure your OnDeck works as efficient as possible for your needs. Take the time to setup your preferences to allow you the best end user results as possible.

1. Customize Toolbar- this allows you to turn on or off different functionality that appears in the Nav bar. (See Figure B on page following page)
2. Gallery Toolbar - This gives you the option of having your toolbar show up along the bottom or as a full menu view.
3. Default Screen - Choose which screen you see by default at Login
4. Select Time Standards - This allows you to choose what time standards you would like to have available to compare against. (See Figure C on following pages)
5. Time Standards Filter - You can limit the athletes that show in the comparison view by None, Age High, or Age High/Low
6. Visible Rosters - Choose what roster groups are visible throughout OnDeck (See Figure D on following pages)
7. Allow Relay Lead Legs - Allows lead off legs of relays to count as individual times

Set-up Basics

Figure A 1

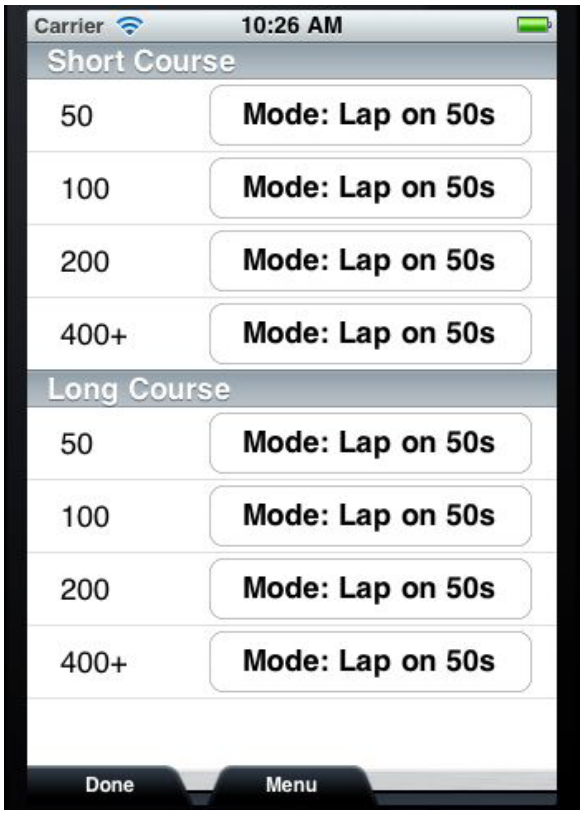


Figure B 2

1 Figure A - Configure Split Distances - from this screen you will be able to set the lap distances for both Short course and Long Course

2 Figure B - Customize Tool Bar - You can turn on/off certain menus and adjust the display order by simply dragging using the triple bar on the right.

Set-up Basics

Figure C 1

Figure D 2

1 Figure C Time Standards -Select from available time standards (up to 50). If you see missing regional or outdated national standards e-mail support@teamunify.com to get them added.

2 Figure D Select Rosters - Select the rosters you would like to show in OnDeck by checking or un-checking the associated box

Set-up Basics

Notes

Set-up Basics

Frequently asked questions.

Q Why can't I download OnDeck?

A If you are having problems downloading OnDeck please try upgrading your iPhone or iTouch to the latest version. You can do this by connecting to the iTunes store. It should ask you to update to the latest version; once this is done try downloading Ondeck again. If you continue to encounter problems email support@teamunify.com.

Q Will OnDeck work on the new iPad?

A Yes, it will. Some image distortion may occur due to screen size.

Accounts & Members

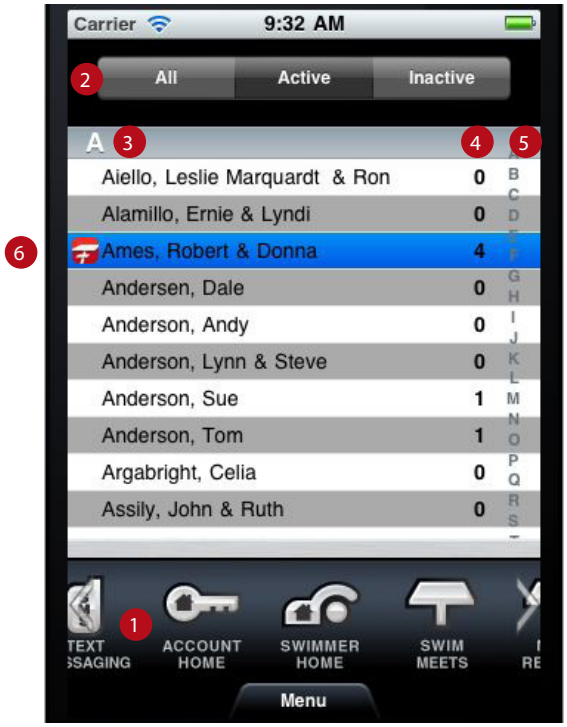
What you'll learn in this Section:

- How to view your active/inactive accounts using OnDeck
- How to view swimmers under those accounts
- How to move up and adjust swimmer's groups
- How to add a photo to a swimmer's profile
- How to view a swimmers Attendance
- How to view a swimmers times history
- How to view upcoming meets for an athlete

Tutorial

Account & Member Management

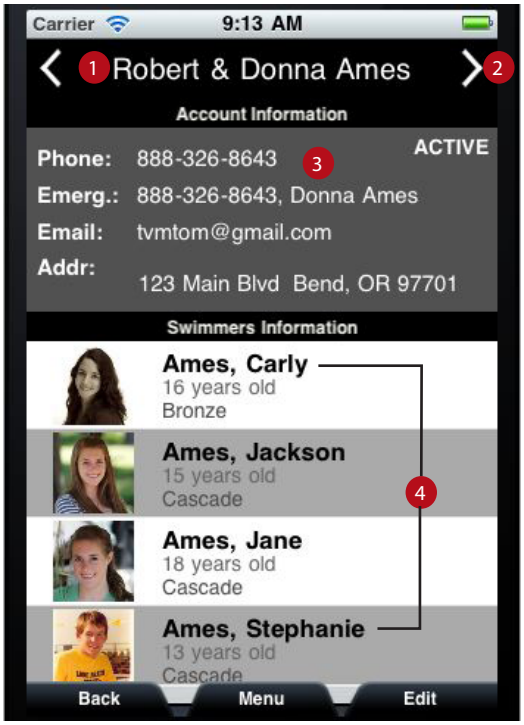
Accounts & Members



Tips and Tricks

Did you know you can quickly move through your account database by clicking the letter on the right of the screen associated with the first letter of the last name you are searching for?

1. **Account Home Tab** - Tap for Accounts & Members info
2. **Filter** - The control bar will allow you to select between views on accounts. All/Active/Inactive.
3. **Account Names** - The accounts will be sorted based on first letter of last name.
4. **Member Count** - This number represent the number of members per account.
5. **Jump to** - You can jump to a specific letter by clicking on the letter in this menu.
6. **Account Information** - Once you have located the desired account, tap on the name to drill into account details. See below

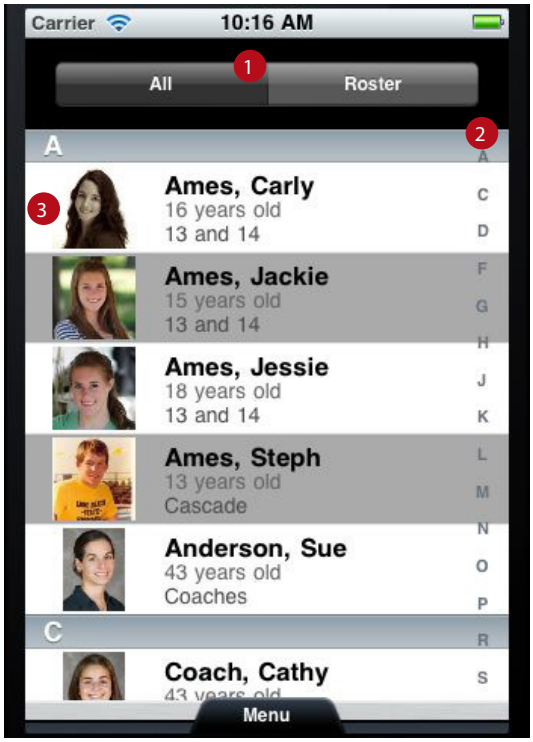


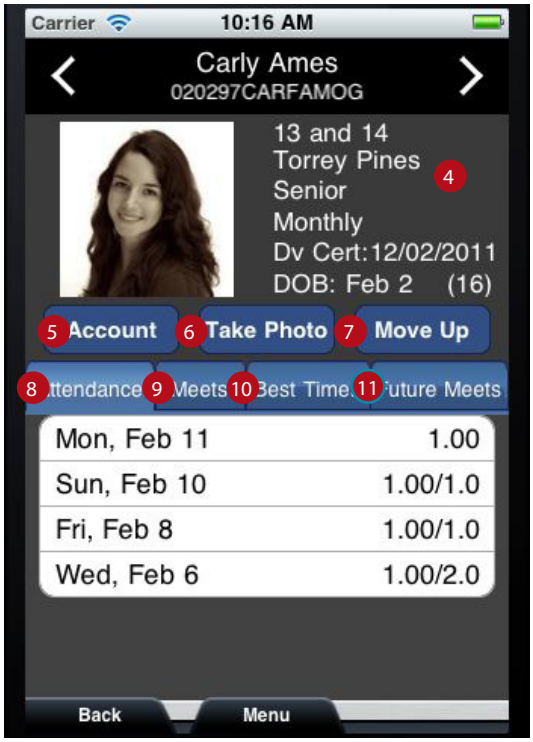
Tips and Tricks

Tap on the phone number to quickly dial this account number. Tap on the email to quickly email this account.

1. **Account Name**
2. **Arrows** - Using the arrows will allow you to scroll between accounts
3. **Account Information** - Contact details associated with an account are located here as well as the account status. Tap a phone number to call this account.
4. **Swimmer Information** - All swimmers associated with this account will be listed here. You can drill into a swimmer's profile by tapping on the name. This will take you the swimmers profile menu (see Swimmers Home for more details on this)

Accounts & Members





1. **Filter Set** - This will allow you to switch between all swimmers sorted alphabetically by last name or by roster group.
2. **Jump to** - Tap on the letter of the athletes' last name to quickly jump to that athlete.
3. **Swimmer Profile** - You can drill into a swimmers profile by clicking on the picture/profile
4. **Athlete Info** - Swimmers name, athlete ID #, and you can tap the key symbol to go back to the account.
5. **Account** - Select to go back to the Account.
6. **Take Photo** - Take or add an existing photo to an athlete profile
7. **Move Up** - Change an athletes Group, Location, Diving cert date, SMS # (See Fig. A on following page for more details)
8. **Attendance** - Show the practices attended for the past 10 days, you can drill into the actual workout by clicking on a specific date (see the Attendance Section for more details)
9. **Meets** - This tab will show you all results swum by meet for a given athlete; if you tap on a result you can compare it to all like results from all meets
10. **Best Times** - This tab will allow you to pull the best times for a given athlete. If you tap on an event you can drill into this event to see details on the meet it was swum at. (See Fig. B on following page for more details.)
11. **Future Meets** - This will show any future meets that are scheduled for a selected athlete. If you tap on the meet it will move you into the meet (see Swim Meets Section for more details)

Accounts & Members

Figure A 1

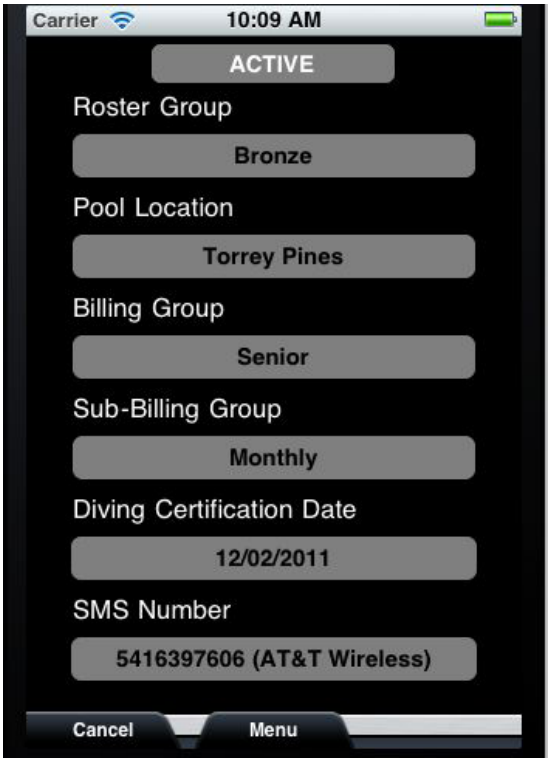
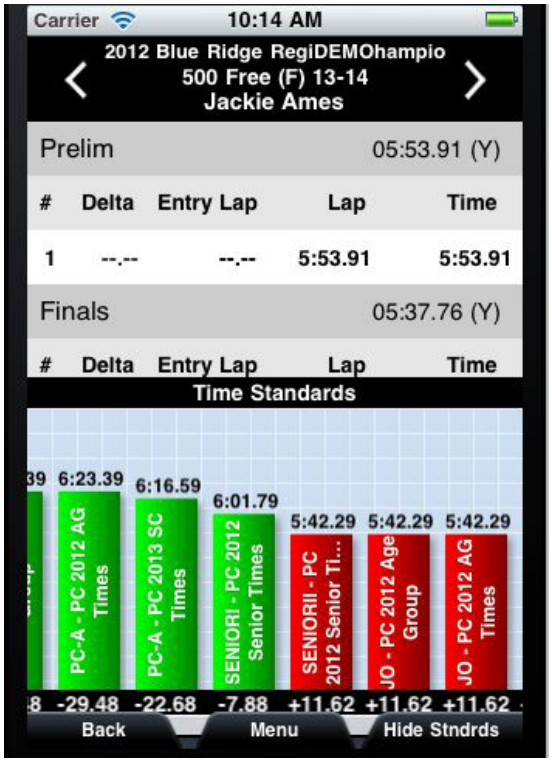


Figure B 2



1 Figure A (SuperUser Only) Move Up - By tapping on any of the buttons you will be able to adjust this parameter. These are Athlete status, Roster Group, Pool Location, Billing Group, Sub-Billing Group, Diving Certification Date, SMS Number. Select SMS to instantly send a code to the athlete's phone for verification.

2 Figure B Best Times - This screen allows you to see and compare the athletes' best time with any standards you have selected. (See Setup Basics for more details.) Those standards in green have been met and those in red have not (flick left or right to scroll). You will see how much deviation between an athlete's time and the standard located at the bottom of the standard bar.

Accounts & Members

Notes

Accounts & Members

Frequently asked questions.

Q How do athletes view OnDeck voice notes and information on the website?

A The family needs to sign in and select “Attend this Event” for the event in question. There will be an OnDeck button next to athlete. The family can click on this for all information including deltas and voice notes.

Q Can you move a swimmer to a new group in OnDeck?

A Yes, by using the Move Up function you can change a swimmers group, this is a Super Users only function

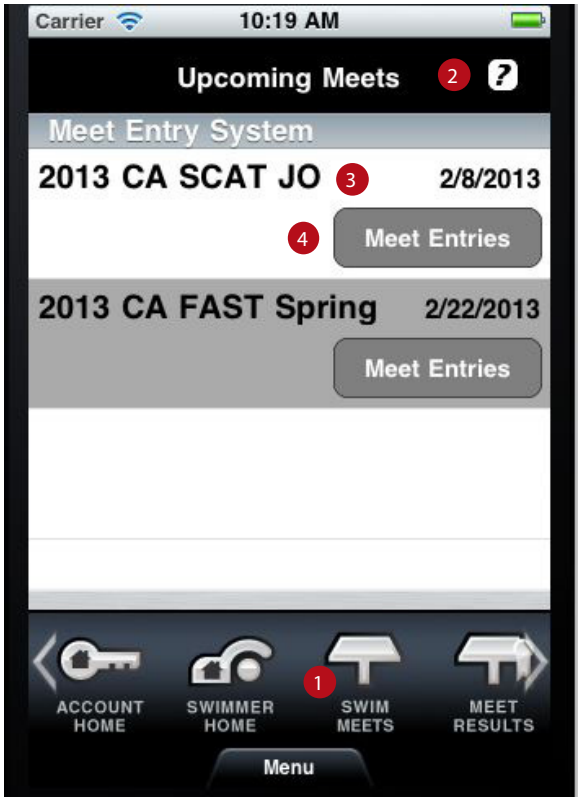
Swim Meet Management

What you'll learn in this Section:

- How to select a meet to view and time
- How to select an event and set heat and lane assignments
- How to time a race
- How to add a voice note so families can review it later
- How to deck enter an athlete or relay

Tutorial Swim Meet Management

Swim Meet Management

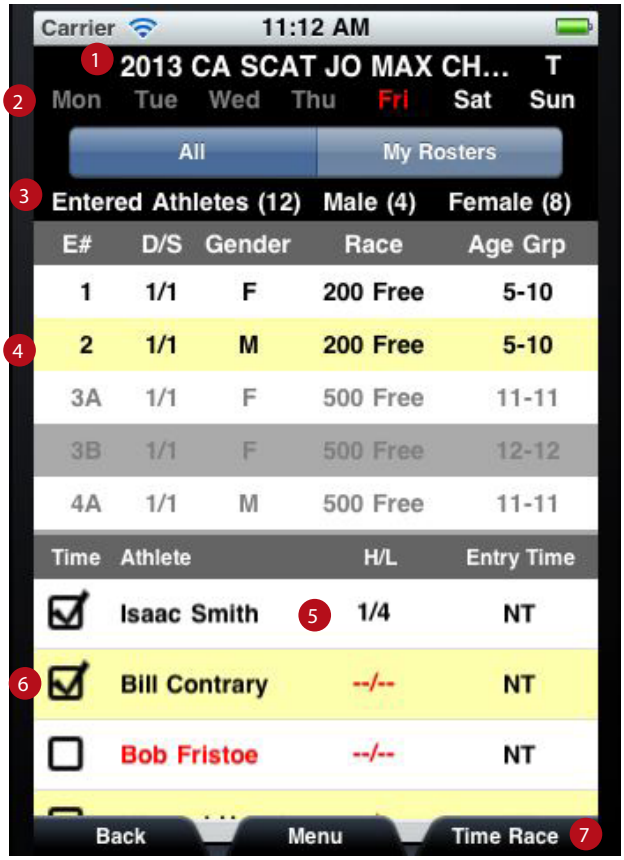


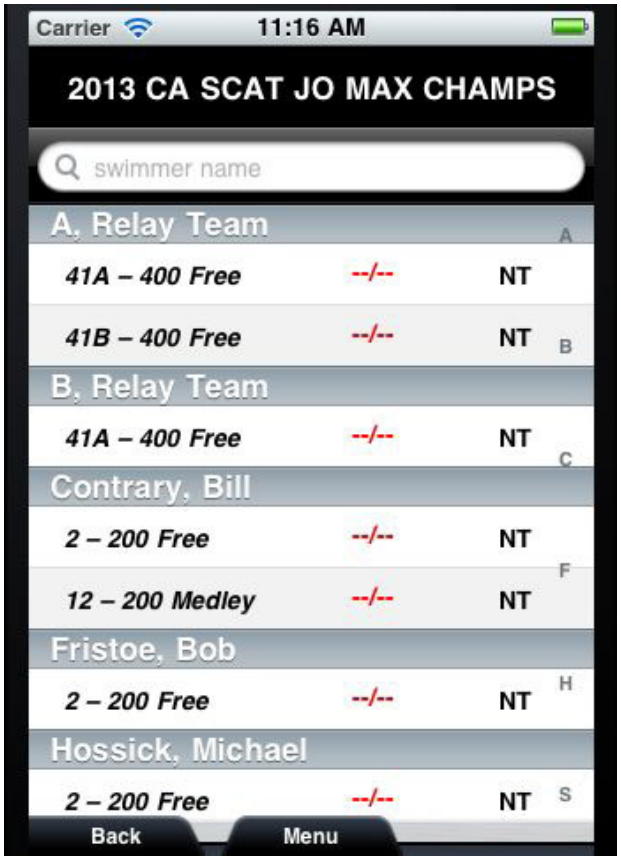
Tips and Tricks

Meet Entries doesn't just do meet entries. You have the ability to record voice notes, take unofficial splits and do deck entries. If you are using TeamUnify's, TouchPad software to run your meets, you will be astounded at how much of the meet can be managed with OnDeck. This is going to change the way you think about meet management..you might even say it's 'FUN'.

1. **Swim Meets Icon** - Tap Swim Meets to access Swim Meet Management
2. **Information** - Tap the ? to access information on how to use this screen and more tips & tricks
3. **Meet Information** - This will show all upcoming meets that have been created in SwimOffice using an event entry file from a meet management program for instance TeamUnify's 'TouchPad', or Hy-Tek's 'MeetManager' (tm)
4. **Meet Entries** - Tap Meet Entries to begin management

Swim Meet Management





1. **Meet Information** - Meet Title and date of meet
2. **Meet Days** - You can tap on a specific day to look at from this menu. If the day is bold there are events scheduled for that day. If day is in red it is the current selection
3. **Entered Athletes** - You can tap on enter athletes to see all athletes entered into this meet. You can also tap on Male or Female to see only gender specific entries. (See Fig A)
4. **Events** - You can see event information from this screen. If you tap on a specific event you will see all athletes entered in that event.
5. **Heat/Lane assignments** - You can see heat and lane assignments from this menu. If you tap on the red --/-- you can assign heat and lane. (See Fig. A on following page for more details)
6. **Committed Athletes** - This will show your entered athletes for the selected event. If you would like to time an athlete(s) simply put a check mark next to their name and tap "Time Race" on the bottom right, you can time up to 3 athletes per race. (See Fig B on following page for more details)
7. **Time Race** - If you tap on the "Time" it will select all the athletes in view for timing

Swim Meet Management

Figure A 1

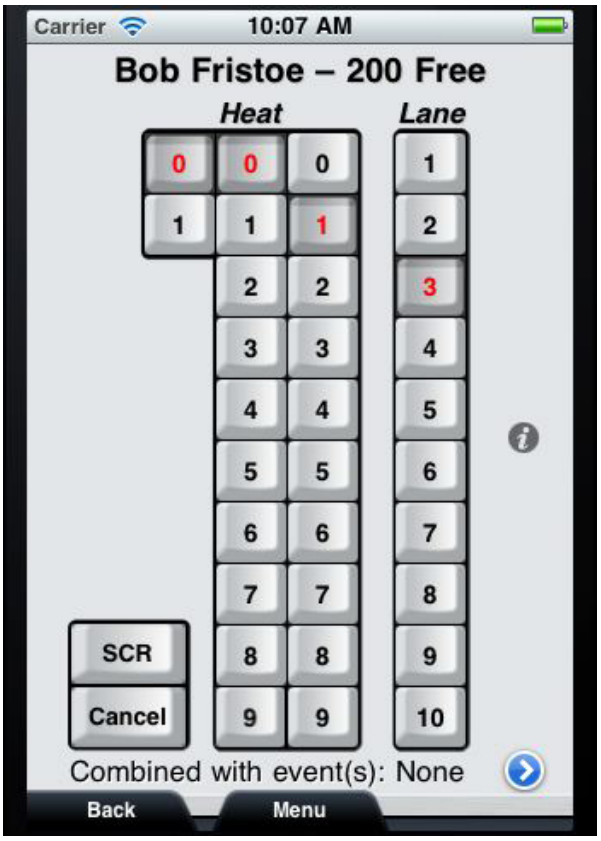
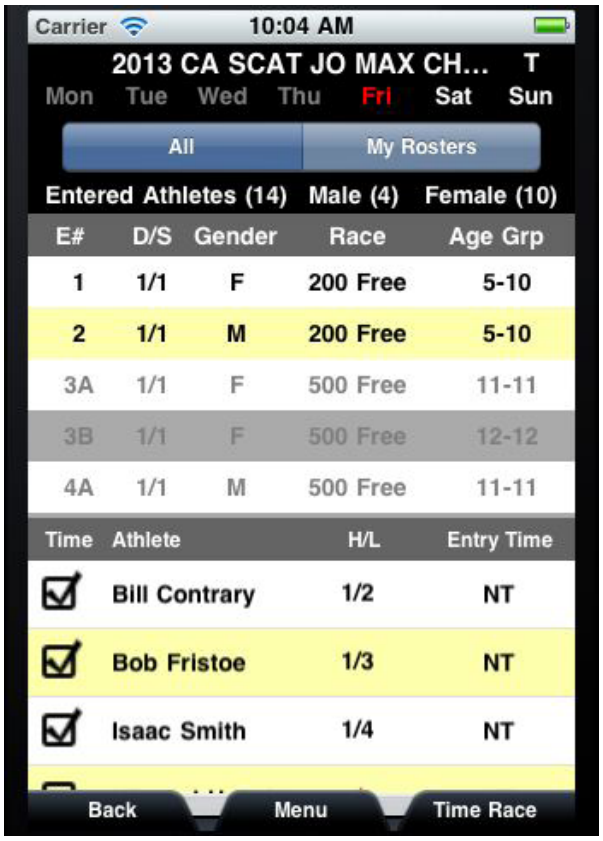


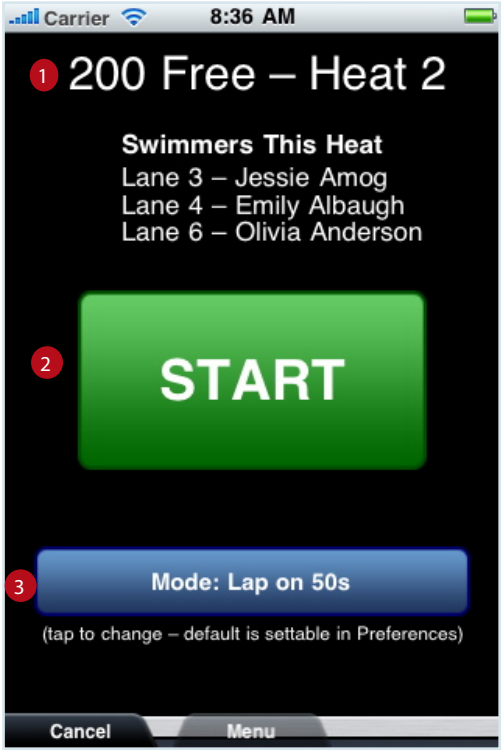
Figure B 2



1 Figure A - Heat and Lane assignment allows you to set heat and lane for each of your swimmers simply by clicking on appropriate buttons. You can scratch a swimmer from the event by clicking the "SCR" button. To combine a swimmer with another event you would click on the Blue arrow and select the event you are combining.

2 Figure B - Allows users the ability to select and time up to three athletes in a single instance (see Fig A on following pages for more details)

Swim Meet Management



Tips and Tricks

Did you know that you can use the shake functionality to start a race. This is great if you hear the starting horn when you are talking to your other swimmers.

If you are timing multiple athletes but different heats, OnDeck has the built in intuition to go in heat order.

1. **Event/Athlete Information** - Shows Heat, Lane, Distance, Stroke as well as swimmers in the event
2. **Start** - Tap to start timing the race. (See following page for timing screen)
3. **Mode** - tap allows you to change lap distance to 25, 50, 100, Free Form. You can change the default by going back to your preferences and setting it.

Swim Meet Management

Figure A

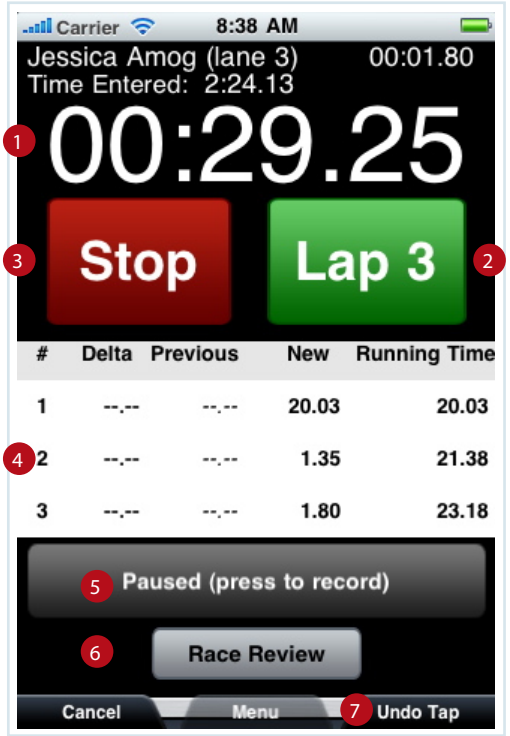


Figure B

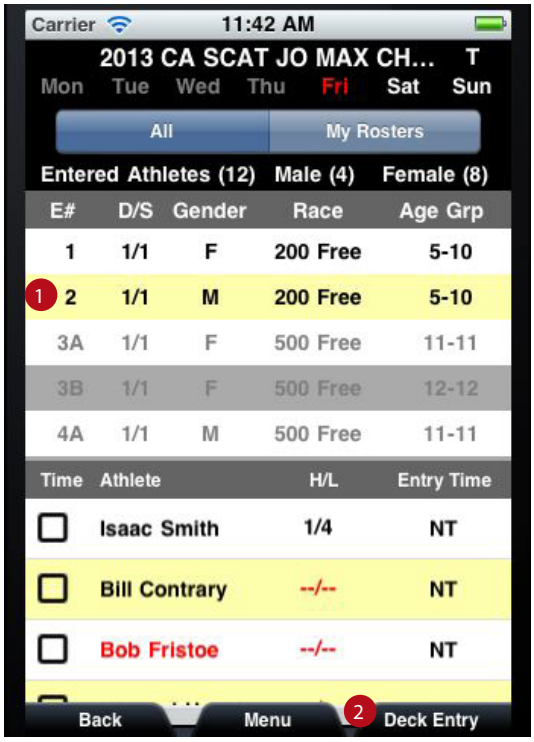
Figure A

1. **Time** - Swimmer(s), Entered Time; Time expired for current lap
2. **Lap Count** - Tap to record lap/split time
3. **Stop** - Tap to stop timing
4. **Dynamic Timing Screen** - Shows recorded lap time, as well as running laps. If the entry time has splits they will be displayed along with the deltas
5. **Voice Note** - This will allow coaches to record voice notes as the race runs. You can pause a recording and start recording again during the race. This is only available when timing a single swimmer. (See Figure A above)
6. **Race Review**- allows a review of already timed races, upcoming races and the ability to delete results. This as well as review/record voice notes on a race
7. **Undo Tap** - Tap to remove the last tap done and continues the timing.

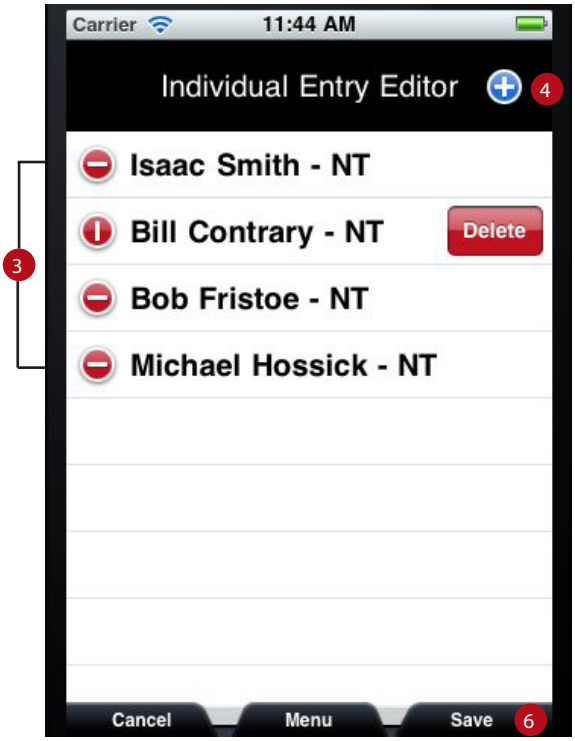
Figure B

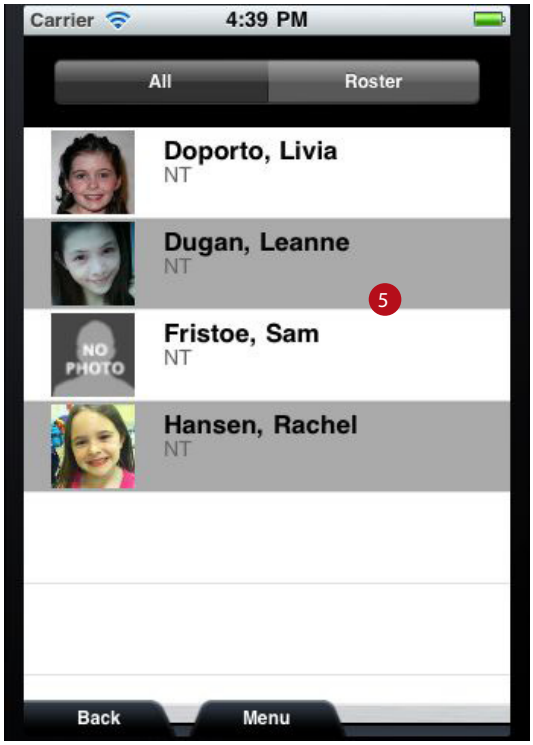
1. **Multiple Athlete Timing** - When you have selected up to three athletes in the same heat, OnDeck will stack them for ease of timing. Each athlete has their own timing/lap functionality. To do a voice note or delete a time, select race review and the athlete.

Swim Meet Management - Deck Entry IE

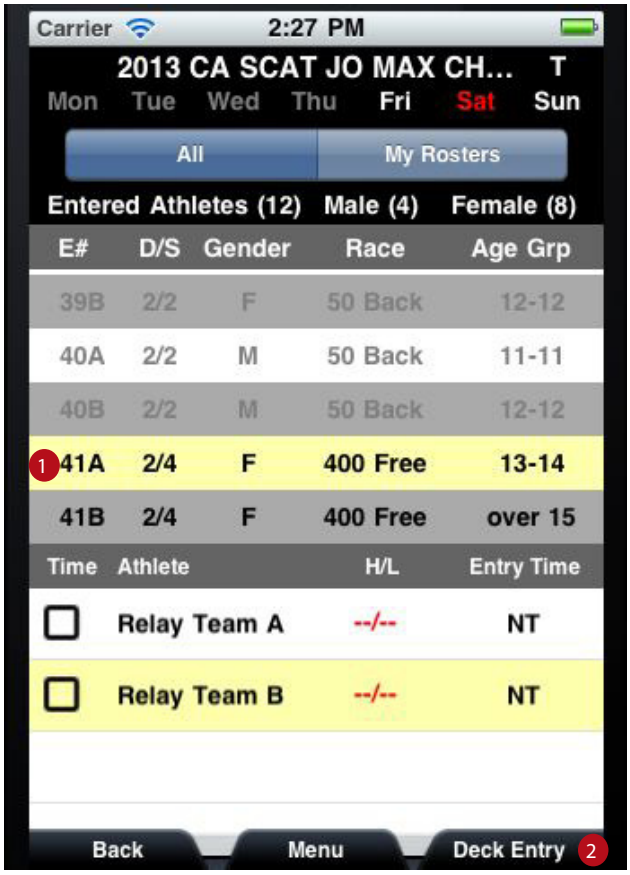


1. Events - Available events to select from, the event that is highlighted in yellow is currently selected
2. Deck Entry - Once the desired event is selected tap on the deck entry button
3. Participants - This will bring up the event with the existing entered athletes appearing. If you wish to remove an athlete from the event you can click on the red bar and click the delete button.
4. Deck Entry - If you wish to add a new athlete to the event click on the Blue plus button.
5. Filter - You can choose from your roster of athletes that are eligible (based on age and gender). Tap on the athlete name to enter them in event
6. Once entered be sure to save

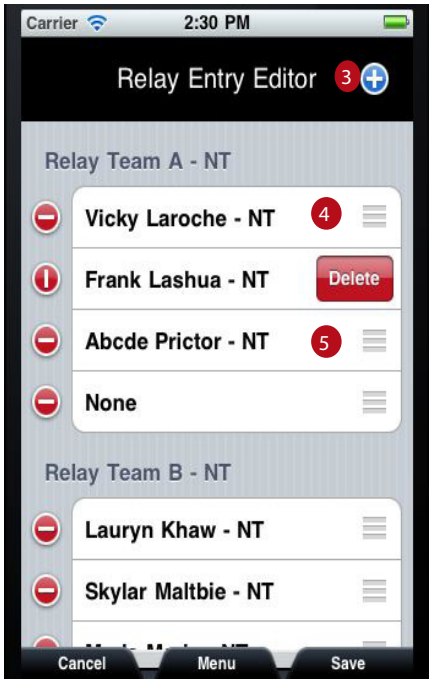


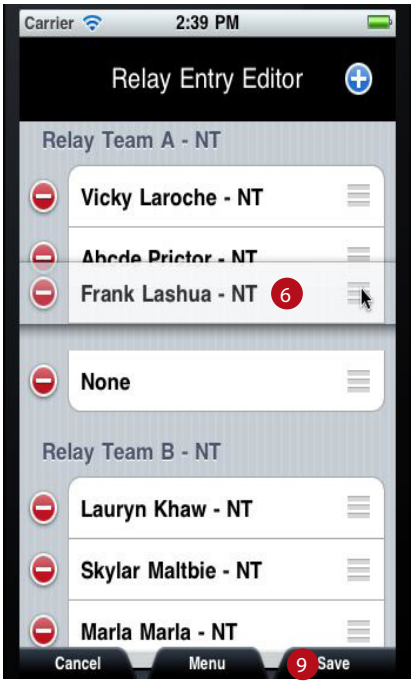


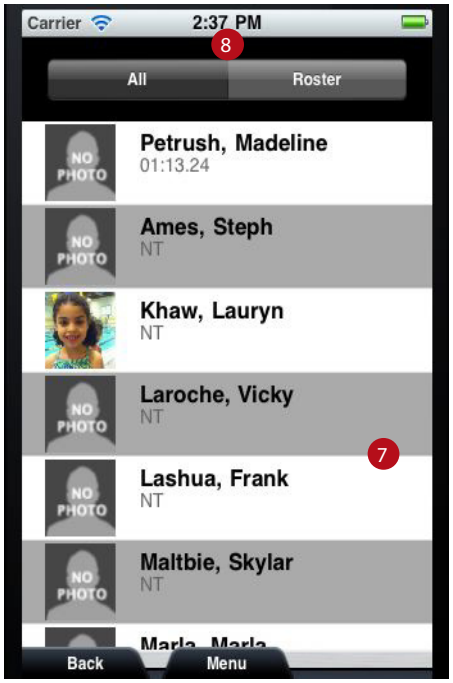
Swim Meet Management - Relay Deck Entry



1. **Events** - Select relay event, the event that is highlighted in low is currently selected
2. **Deck Entry** - Select relay and tap Deck Entry
3. **Add Team** - Tap on the blue plus symbol to add a comple new relay team for this event
4. **Relay Team Information** - Existing relay teams with entry ti based on times for each leg.
5. **Delete Athlete** - You can remove an athlete by tapping on red bar button then the delete button. Alternatively if you want to replace an athlete you can tap on the name you v to replace and be taken to the athlete picker screen. You see all relays entered for this event and even move athl between relay teams
6. **Move Athlete** - To move an athlete within or between relays s ply tap on the triple bar and drag to the desired location.
7. **Qualified Athletes** - You can select an athlete from the pi screen. Only eligible athletes (based on age and gender) be available for selection.
8. **Filter** - You can choose to view athletes in the picker scree either alphabetical order or in their existing roster groups.
9. Remember to save changes







Notes

Swim Meet Management

Frequently asked questions.

Q Can more than one person upload and Download information using OnDeck?

A Yes, if you have more than one admin or coach using OnDeck you will both be able to upload Information to SwimOffice. Beware that if you are both timing the same swimmer both results will appear under that swimmer.

Time Standards

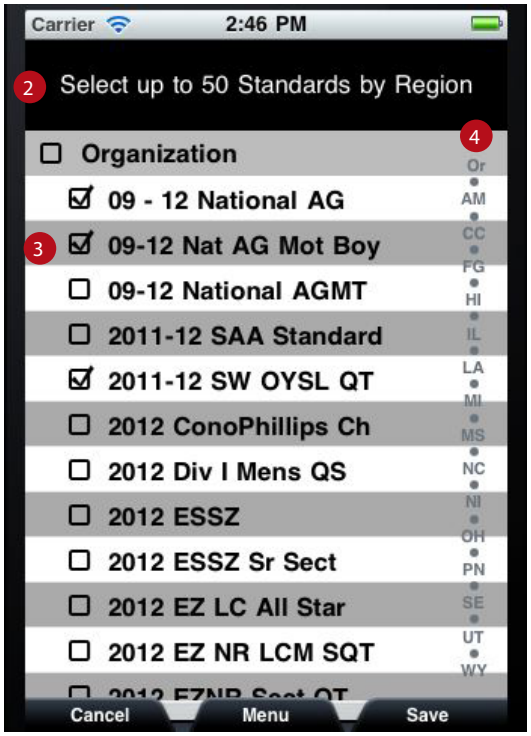
What you'll learn in this Section:

- How to select your desired time standards for comparison
- How to select the gender, course, stroke, and distance to compare against
- How to see who has made the cut and at what meet that cut was made

Tutorial

Time Standards Management

Time Standards



1. **Time Standard Icon** - Tap Time Standards to access the Time standards screen
2. **Information** - You can select up to 50 time standards. To get to the selection go preferences>time standards. (For more details on this see Set-up Basics)
3. **Standards Available** - Select from national or region standards by putting a check mark next to desired standard
4. **Jump To** - You can jump to LSC regional standards by tapping on the LSC code in this bar
5. **Time Standard Selection** - Select gender, course, stroke, and distance by clicking on the appropriate buttons.
6. **Compare** - Find the standard you wish to compare against and click on compare (sorted by age group)
7. **Results** - This will pull all active swimmers who have made the cut and not made the cut.
8. **Deviation** - You will also be able to see the deviation above or below the cut time here, if you tap on the name you will be able to see in which meet this result was swum.

Time Standards

Notes

Time Standards

Frequesntly asked questions.

Q Can I get a new LSC or National Standard added to the time standard list?

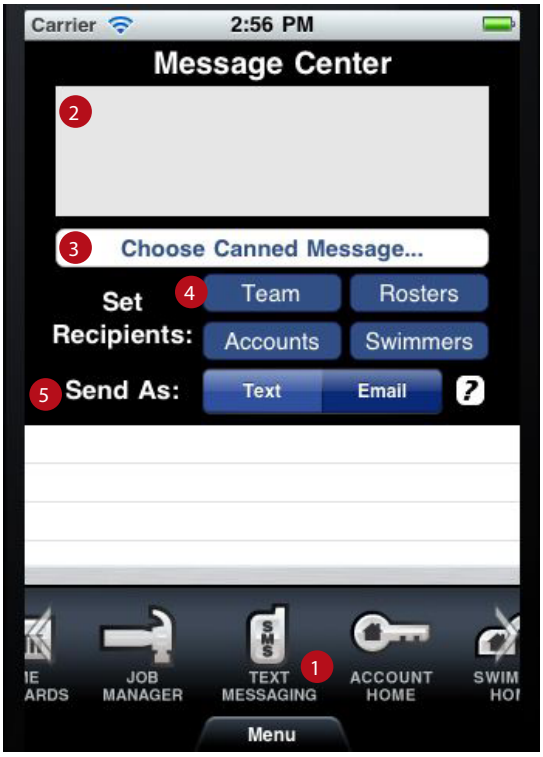
A Yes, please e-mail the regional or national standard in pdf or excel format to support@teamunify.com. You can also manually enter standards using the Times Standard tab in SwimOffice located in My Account>>My Meet Results

E-mail & SMS Communication

What you'll learn in this Section:

- How to create a message for e-mail or SMS
- How to select who you want to receive the message
- How OnDeck integrates with the Communication editor in SwimOffice
- Tutorial: Communication Management

E-mail & SMS Communication



1. **Text Message Icon** - Tap Text Messaging to access the message center
2. **Message Editor** - You can create a custom message here (up to 160 characters). Simply tap on the white area and the keyboard will appear
3. **Canned Message** - You can also use the canned message section to select quick messages using the roller. (see Fig. A)
4. **Set Recipients** - You can also select who you would like to receive this message from these lists: Team, Accounts, Rosters, Swimmers. (see Fig. B)
5. **Send As** - You can choose to either Text or E-mail as the format. Once selected, depending on the verifications status of either the e-mail or cell number, the accounts or member names will be color coded. Red means that this person will definitely not be getting the communication, black means a person may or may not get communication, and green means that this person has a verified e-mail or cell number. (See Comm editor in SwimOffice for more details)(see Figure C)
6. Tap send

Figure A

Figure B

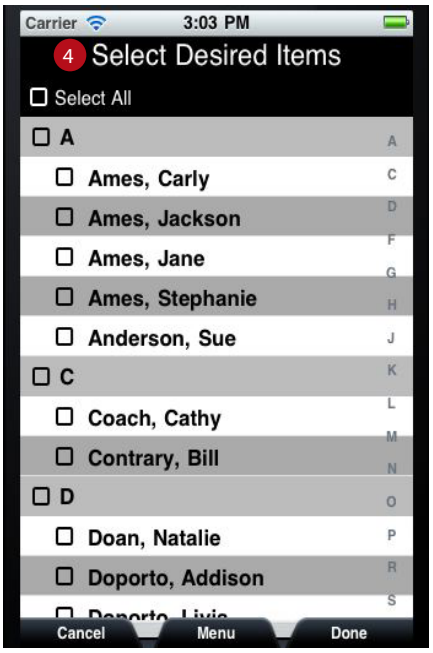
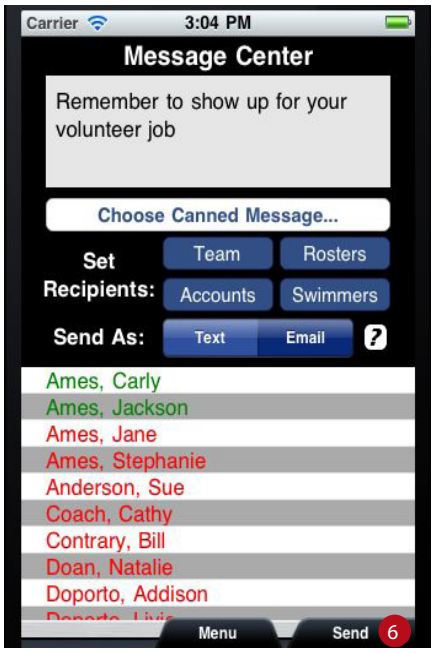


Figure C



E-mail & SMS Communication

Frequently asked questions.

Q What are the limits on E-mail addresses and SMS numbers for the new Comm editor?

A The Communications Editor will allow each Account can have up to 4 e-mails and 2 SMS/Text capable phone Numbers. Each Member can have 1 e-mail and 1 sms number.

Q How do I update a login E-mail address in the New Comm editor?

A If you would like to update a login e-mail address for an account please follow the steps below.

1. Sign in to the site and go to Account/Member admin located under the Team Admin Menu
2. Find the account you would like to update and click on the underlined account name
3. You will see the login e-mail as the top e-mail in the comm editor, double click on the address and you will be able to update
4. Click save changes and send out the password e-mail

E-mail & SMS Communication

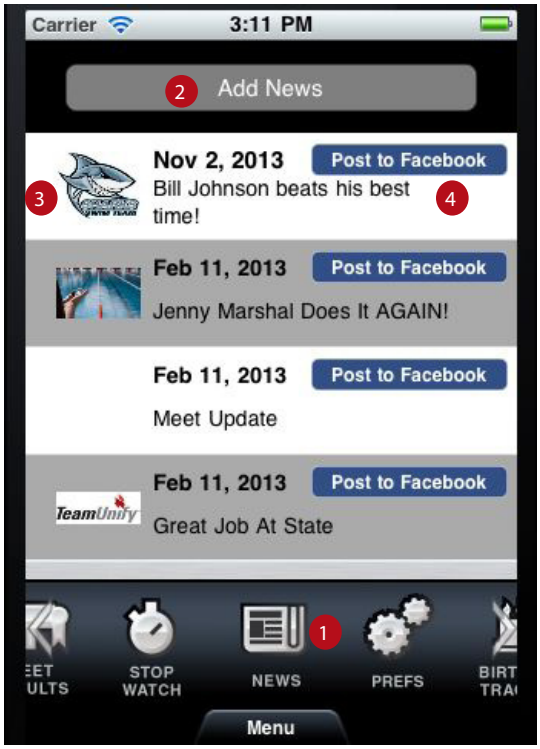
Notes

News Management

What you'll learn in this Section:

- How to create a News item
- How to review/edit an existing news item
- How to post the news item to your team's Facebook Page
- Tutorial: News Management

News Management



Tips and Tricks

Did you know that you can e-mail your whole team a big news item by using the e-mail on synch function. This is a great way to keep your members involved and excited about team news

1. **News Icon** - Tap News to access the News functionality.
2. **Add News** - Add a new News item by tapping here (See below for more details on creating a new item)
3. **News Edit** - To edit an existing item tap on the picture, then tap on the edit on the bottom right (see Fig A. on follow page)
4. **Facebook** - Post this item to your target page on Facebook (see Fig. B on the following page). OnDeck will give you an option of what page to post to. Once you have posted, OnDeck will change the button "Post to Facebook" with the fb icon.

Creating a News Item

1. **Headline Photo** - Tap here to either take a photo if your device has the functionality or choose a photo from your library to be added as the title picture
2. **Title** - Tap here to add a title
3. **Body** - Tap here to add the body/copy of the news item
4. **News Photos** - Tap to add an attached picture to this news item
5. **Send email on sync** - Turn to Yes if you want to send a blast e-mail to your whole team with this news item
6. **Voice Note** - Tap to record a voice note that will be attached to this news item.
7. **Save changes**

News Management

Figure A 1

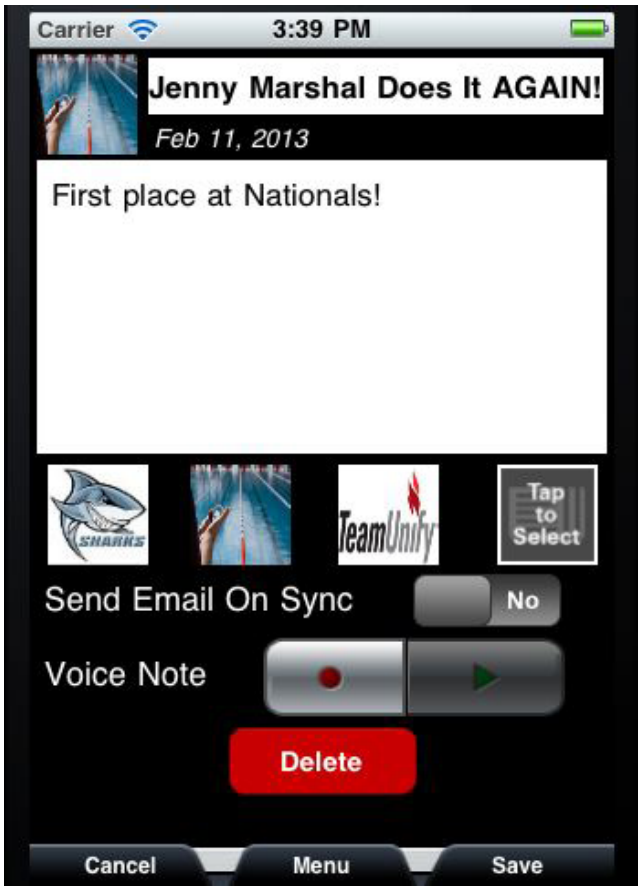
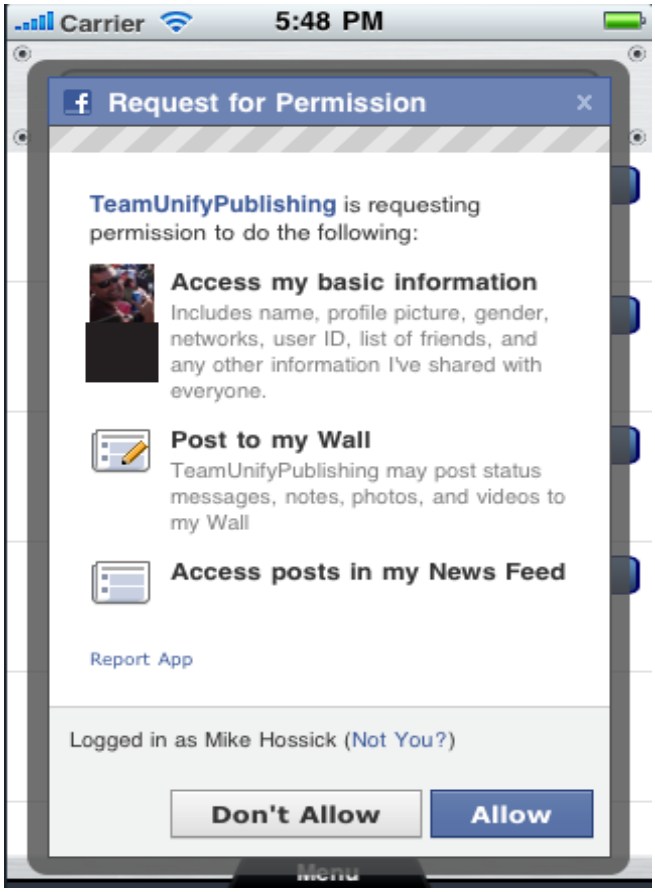


Figure B 2



1 **Figure A** - Review/Edit a news item tap on any of the areas to edit. You can also delete a news item by tapping delete

2 **Figure B** - Enter in the e-mail account and password to your Facebook page then select allow. Once allowed, news items will be posted to your team's Facebook page

News Management

Frequently asked questions.

Q How can I activating the Facebook Icon on my Site?

A
1. Sign in
2. Click on the Website Design located on the left under the Team Admin menu.
3. Click on Website Layout Configuration (Or the Migrate to Chameleon if you have not fully changed over) button
4. Scroll down to the Facebook URL:
5. Enter in the URL address(example http://www.facebook.com) of your Facebook page here and the icon will light up under the sign in area of the site.
6. Always remember to Save Changes

News Management

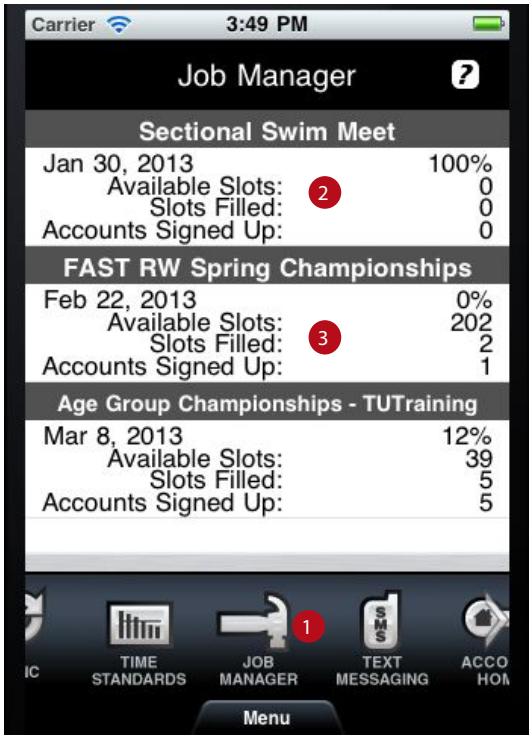
Notes

Volunteer Job Sign-up

What you'll learn in this Section:

- How to select a meet to manage jobs
- How to Add a job
- How to add a job slot
- How to add a volunteer into a job slot
- How to confirm a job done
- How to communicate updates to volunteers
- Tutorial: Jobs Management

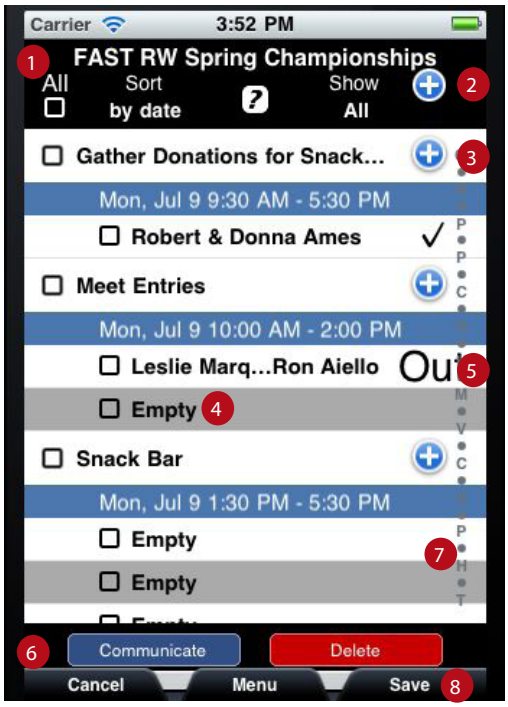
Volunteer Job Sign-up



Tips and Tricks

Did you know that you can quickly add another time slot to a job simply by hitting the plus button. This is very helpful if you have volunteers who are willing to help on meet day.

1. **Job Manager Icon** - Tap Job Manager to access the job functionality
2. **Job List** - After tapping on the job manger icon a list of events will populate this screen.
3. **Job Information** - You can see these items: Name of the event, date of the event, available slots, job slots filled, accounts signed up, and percent of jobs taken. Tap on the event for more detail or to edit.



1. Event Name
2. **Add Job** - Tap the blue plus button to add an entirely new job to this event. (see Fig A on following page)
3. **Add Time Slot** - Tap blue plus button to add a new time slot for this job
4. **Add Account** - Tap empty title to add an existing account to this slot
5. **Job Done** - Tap this field to record if the job was done. Black check mark=done Out=not done
6. **Communication** - Tap the communicate button to e-mail/SMS your volunteers that you have selected with check mark(see Fig B on following page)
7. **Search** - Tap to a time slot, or a job
8. Save Changes

Volunteer Job Sign-up

Figure A

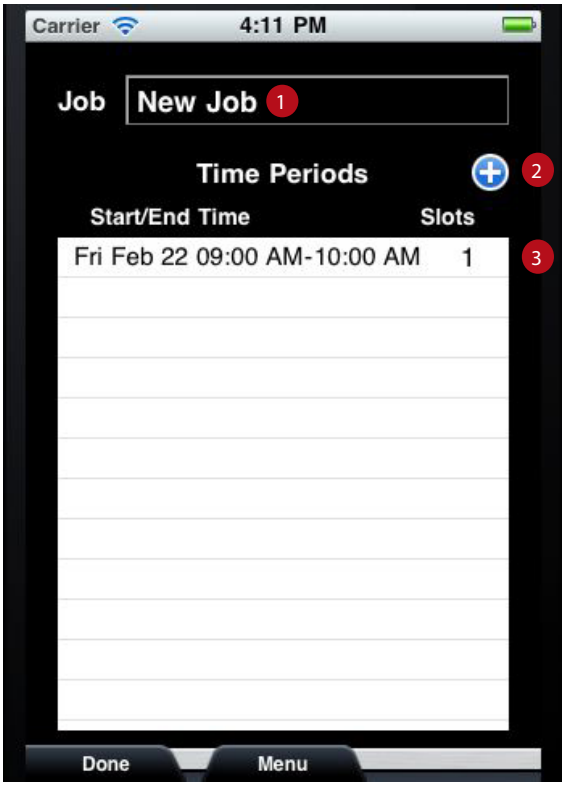


Figure B

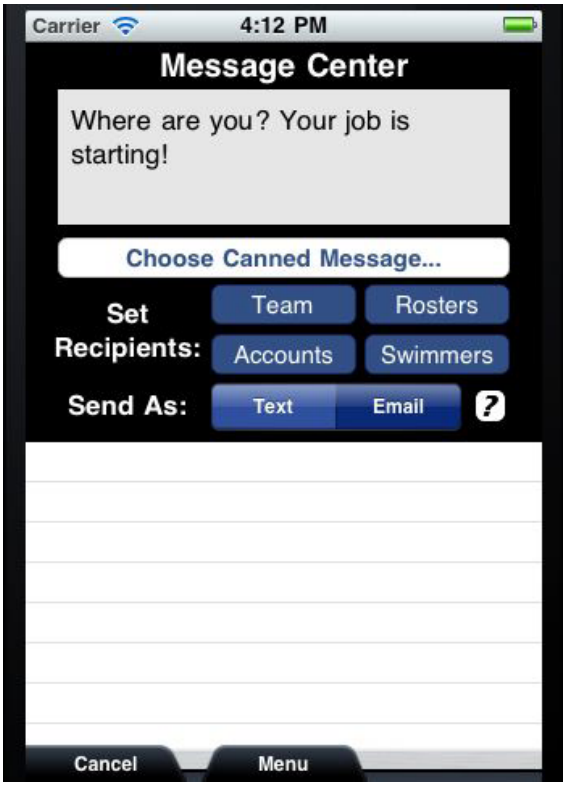


Figure A

1. **Job** - Title of job
2. **Add Time Slot** - Click the blue plus button to add a new time slot for this job.
3. **Time Period Information** - Time date and # of slots will appear here

Figure B

4. **Communication** - Shows the selected accounts in the message center. You can select either e-mail or text to communicate with the these accounts.

Volunteer Job Sign-up

Frequently asked questions.

Q When I synch will my confirmed jobs done in OnDeck update in SwimOffice?

A Yes, once you synch any jobs that have been confirmed in OnDeck it will update the events in SwimOffice. This Synch will also update your Service Hours module if you are using this functionality.

Volunteer Job Sign-up

Notes

Attendance Tracking

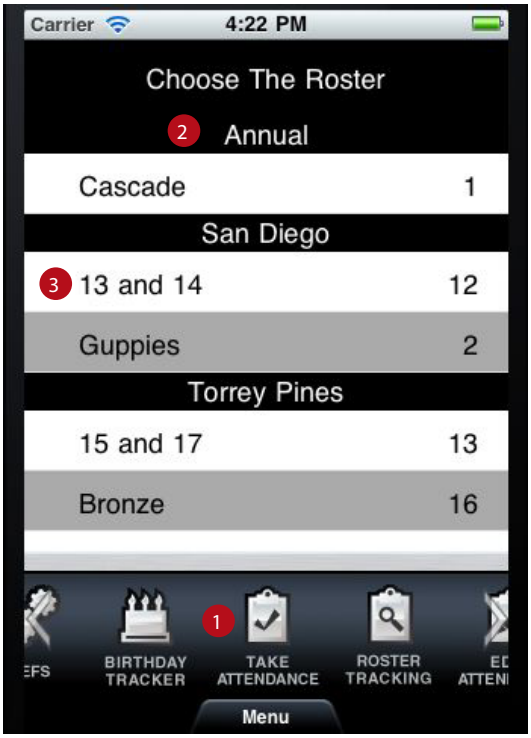
What you'll learn in this Section:

- How to find the roster you are taking attendance for
- How to take and adjust attendance levels
- How to review and modify past attendance
- How to add workout distance to attendance

Tutorial

Attendance Management

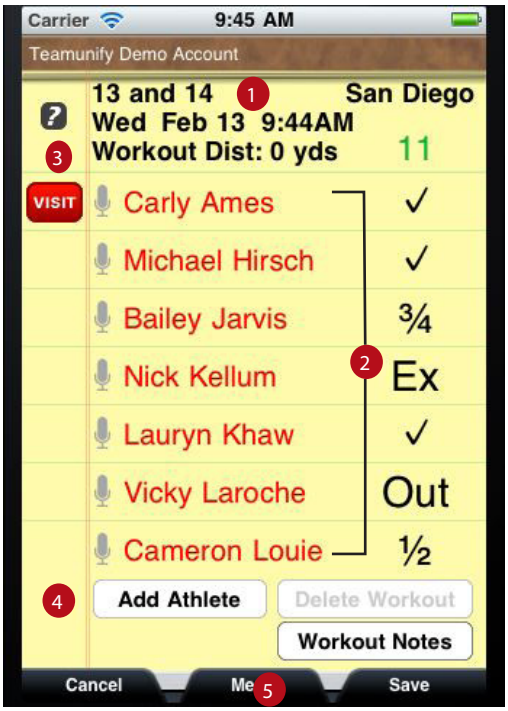
Attendance Tracking



Tips and Tricks

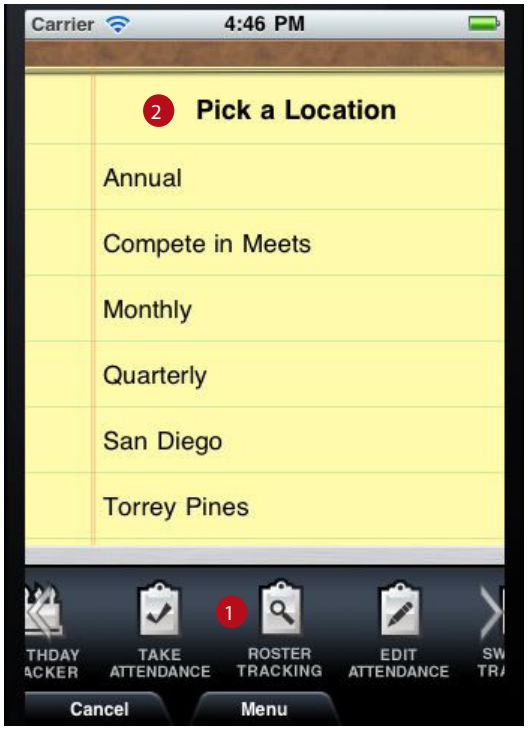
Did you know that can set distances for each workout and then track exactly how far specific groups have swum for any date range.

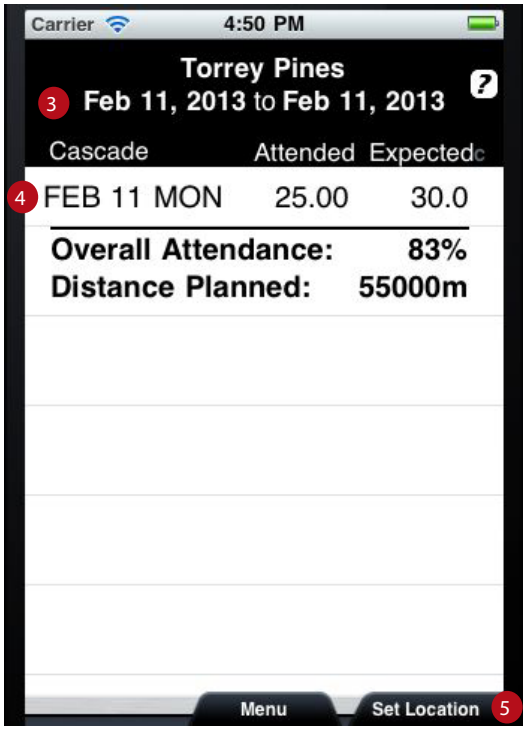
1. Tap on Take Attendance to begin
2. You will see the location here with all roster groups under that location. If you have multiple locations you can scroll down.
3. You will see the roster group name with number of members listed to the right. Tap on the name to take attendance for this group (see below)



1. **Roster Information** - Shows your roster group, location, date, time, workout distance and total athletes attached to this roster. These are tappable and you can update.
2. **Roster Swimmers** - List swimmers in this group. You can select from several states of attendance: full attendance is a green check mark, ¾, ½, ¼, EX (excused), and Out
3. **Edit Information** - You will be able to change date, time, and set distance by tapping on the requisite titles
4. **Add Athlete** - You can add an athlete who is either visiting or making up a workout they will get the red visit tag
5. **Workout Notes** - Select to add a workout or voice note to this athlete. Once you sync, it will go into the attendance records on SwimOffice for admins only, to view.
6. Remember to save

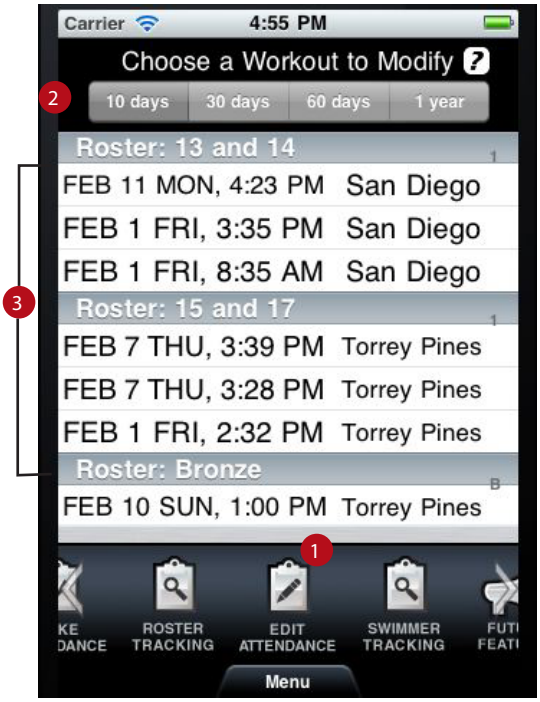
Attendance Tracking



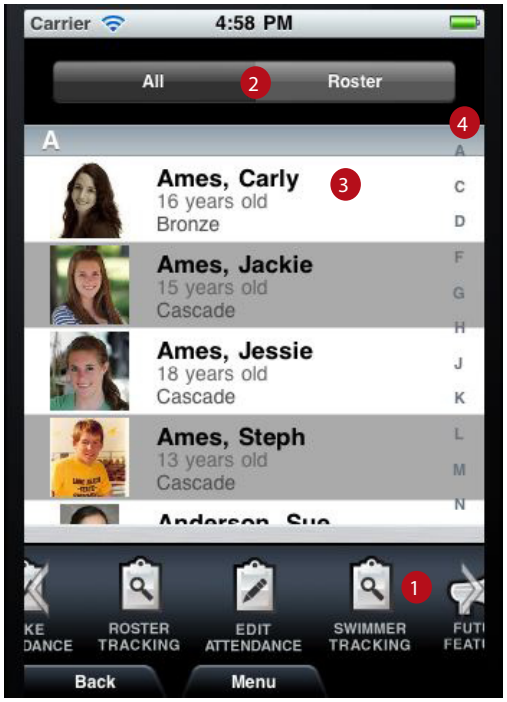


1. **Roster Tracking** - Tap to see an overview of workouts for specific roster group(s)
2. **Pick a Location** - Tap on a location to see attendance for all groups attached to that location
3. **Date Range** - You can adjust the date range to report on desired parameters. This piece defaults to previous day
4. **Date/Attendance Information** - Each date row will indicate overall attendance (actual and expected) for that roster on that day. The summary rows will show overall attendance and distance planned for the selected roster group and date range
5. **Set Location** - You can go back and change locations by tapping here

Attendance Tracking

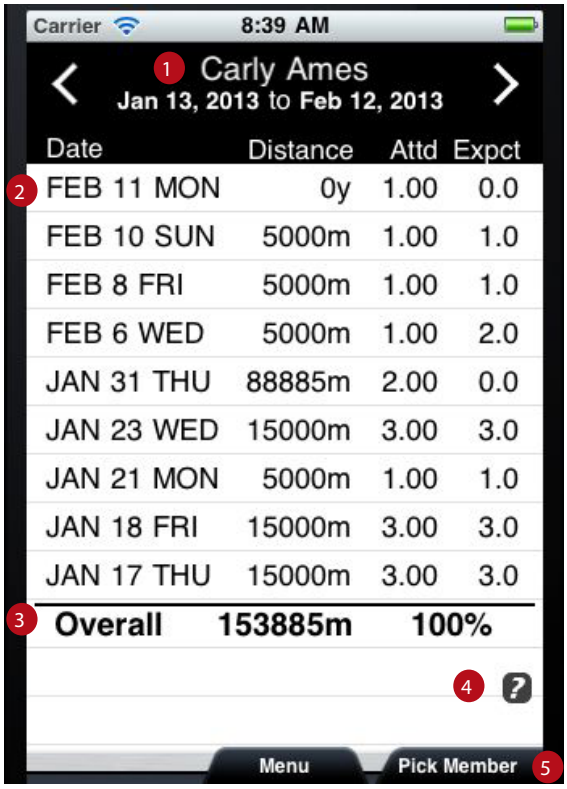


1. **Edit Attendance** - Tap on the Edit Attendance
2. **Date Range** - You can tap on 10, 30, 60, or a year to set how far back you want see recorded workouts
3. **Edit Attendance** - Tap on the desired date under the correct roster name to modify an existing workout



1. **Swimmer Tracking Icon** - Tap on Swimmer Tracking
2. **Filter** - You can view your members by all or by roster group
3. **Swimmer Information** - Tap on the swimmer you would like to review information for (See following page)
4. **Jump to** - You can jump to the last names by clicking on the letter in this column

Attendance Tracking



Tips and Tricks

OnDeck has conversion functionality throughout the application. Make sure you select on any distance function to change the measurement. Select the distance in swimmer tracking to update.

Question marks have been designed to answer many of your questions on usability in OnDeck and offer tips & tricks. Before you contact support, try selecting this tool to find an answer or to give you that trick that makes coaching and administering *FAR* easier.

1. Swimmer Information - You will see a selected swimmer name and the date range (Defaults to 30 days, tap on date to modify the range)
2. Attendance Information - Shows day, distance, attendance, and expected. Tap on any date to modify that workout
3. Total Calculation - This will show total distance swam for the given period and percentage of expected workouts completed. (If expected is equal to 0 it means that you either moved the athlete to a new roster group, or they were counted as a visiting athlete in a different roster group)
4. Question Mark - Always select to find out how to use this menu and for more tips & tricks.
5. Pick Member - You can go back to the member list by tapping here

Frequently Asked Questions

Q Can I add distance to my workouts?

A Yes, simply tap on the workout distance title in the roster attendance screen then adjust the distance accordingly

Attendance Tracking

Notes

More Cool Stuff

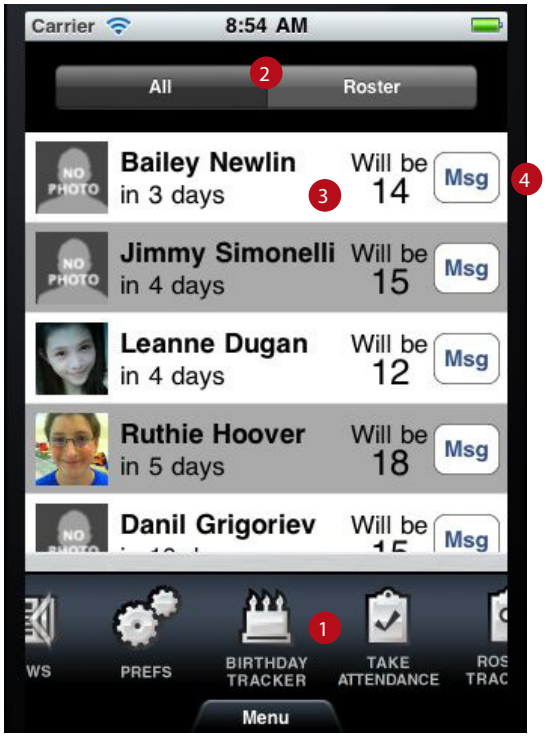
What you'll learn in this Section:

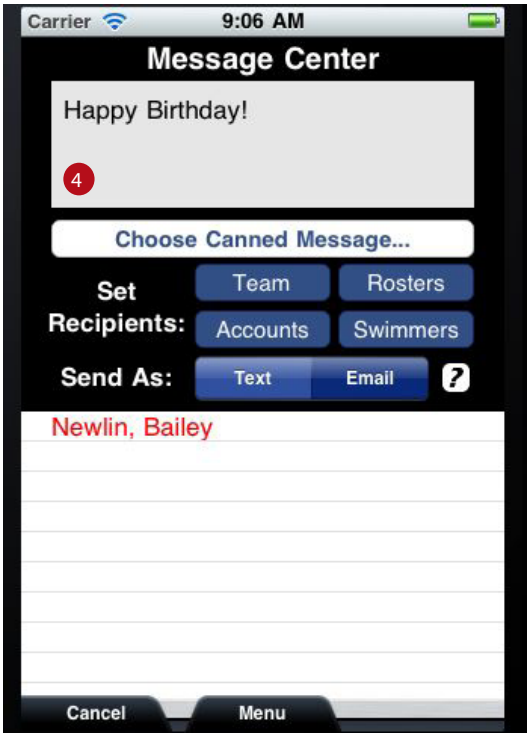
- How to never miss a swimmer's birthday again
- How to use the free form stop watch
- How to use the splits math calculator
- How to view your entire results database

Tutorial

Splits Math Management

More Cool Stuff





1. **Birthday Tracker** - Click on the Birthday tracker to see which swimmer's birthdays are coming up.
2. **Swimmer Filter** - You can choose between all swimmers or view by roster
3. **Swimmer Information** - You will see the swimmer names and they will be arranged by how many days until the swimmer's birthday (those in red are today) and tell you how old the swimmer is going to be
4. **Msg** - Select this to send an instant birthday text provided you have their mobile number in the database and hopefully verified. A great way to let your athletes know you appreciate their commitment to the team!

More Cool Stuff

Tips and Tricks

Use the **stopwatch** and **splits math calculator** to help your athletes's achieve their goals. Use the **birthday tracker** to message your athlete's a 'Happy Birthday'. Use your **attendance** to congratulate athletes that have put in their hard hours. Use your tools to build a team that is excited and motivated to come to each practice every day.

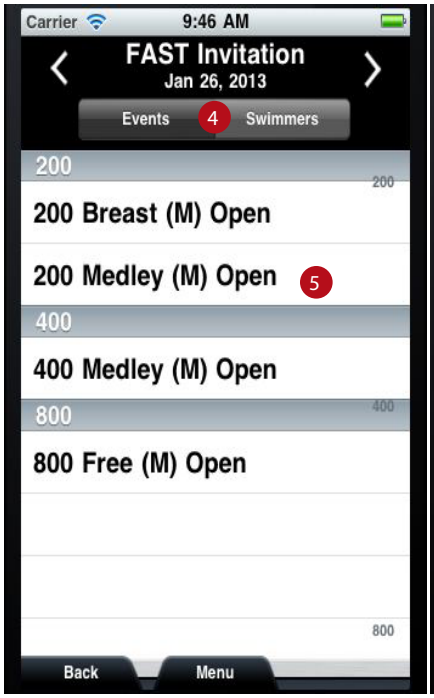
1. Stop Watch - Click on the stopwatch icon to individually time
2. Start/Stop/Lap - You will be able to time one swimmer; the laps will be free form and will not be recorded as official results for any athletes
3. Time Review - Your lap time, deltas, and running time dynamically show in this screen
4. Undo Tap - Select undo tap if you need to return to the previous running lap time

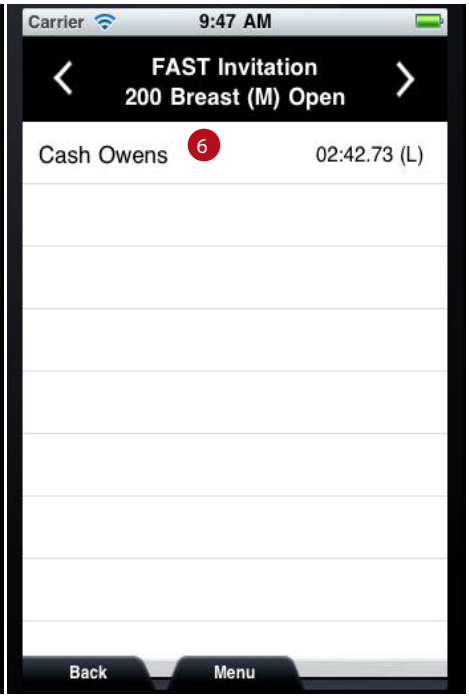
More Cool Stuff

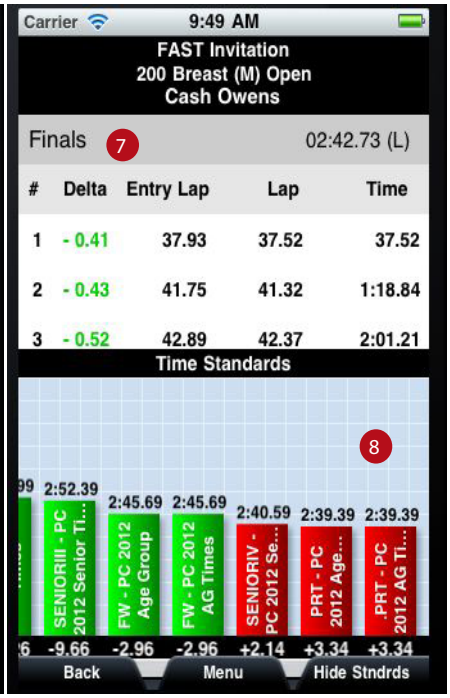
1. **Splits Math icon** - Click on Splits Math to calculate average needed to make a certain time
2. **Distance** - You can select from 25,50,100,200, 400, 500, 800, 1000, 1500, 1650 for distance
3. **Time Wheel** - You will be able to set your desired target time here using the wheels
4. **Target Time** - This will show the average split a swimmer will need to make the desired time selected. It will show split time at 25, 50, and 100 as applicable.

More Cool Stuff

1. **Meet Results Icon** - Click on Meet Results
2. **Meet Information** -Select the desired meet from list
3. **Date Picker** - You can jump to a different year by clicking on the date here
4. **Results Filter** - You can see the result by either event or swimmer
5. **Event Information** - Tap on the desired event you would like to review
6. **Event Participant(s)** - All swimmers that swam in this meet for this event will appear
7. **Swimmer Information** - Tap on the desired swimmer and all of details for this event will appear
8. **Time Standards** - You can compare this swim to select standards (see time standards for more detail)







More Cool Stuff

Frequently Asked Questions

Q Who can access the OnDeck application?

A Only accounts that have email/print/calendar admin level or higher can access the OnDeck application.

More Cool Stuff

Notes

OnDeck Best Practices

- Retention & Performance Strategies

  Using the Birthday Tracker functionality to highlight swimmers big day. This will make swimmers feel appreciated and improve team morale overall.

- Speed

  Setup your Preferences to only include the interface and roster groups that pertain to your needs. This will increase the speed in moving through OnDeck's different functionality.

- Communication

  Use the News and facebook functionality often when you are at meets and swim club events. Highlight personal achievements and team functions. This will keep families and swimmers excited about your team.

- Polish

  Take photos of your swimmers and add them to their profiles. This will not only help you when scrolling through their rosters they will also be able to see this on there swimmer profile in their SwimOffice accounts.

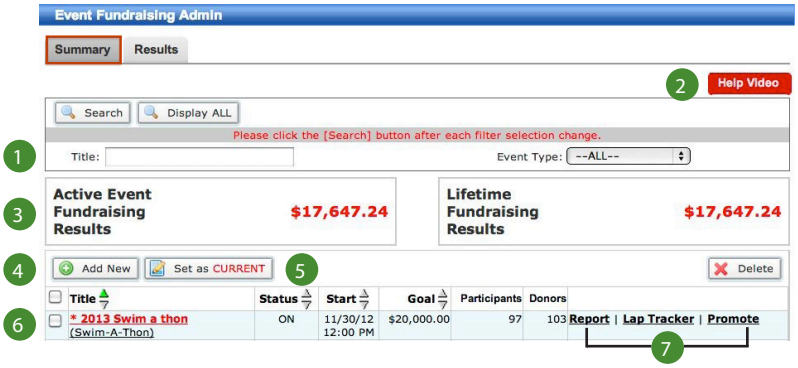
TUMoney™

Event Fundraising Admin

What you'll learn in this Section:

- How to setup your fundraising system
- How do you set up your Incentive Levels

Event Fundraising Admin



Tips and Tricks

Using the **promote** tool is a rich set of email functionality designed to help your team raise money. Use the pretemplated emails to instantly help you to generate excitement for your fundraiser.

1. **Filters -** Set your filters Title and Event type to generate the information below.

2. **Help Video -** The TeamUnify Help videos can be found throughout the fundraising system. Select this button to watch a short tutorial on how to administer this module.

3. **Active & Lifetime Fundraising Results -** Financial information showing the Active event's total fundraising dollars and Lifetime Fundraising results (all dollars generating across all events).

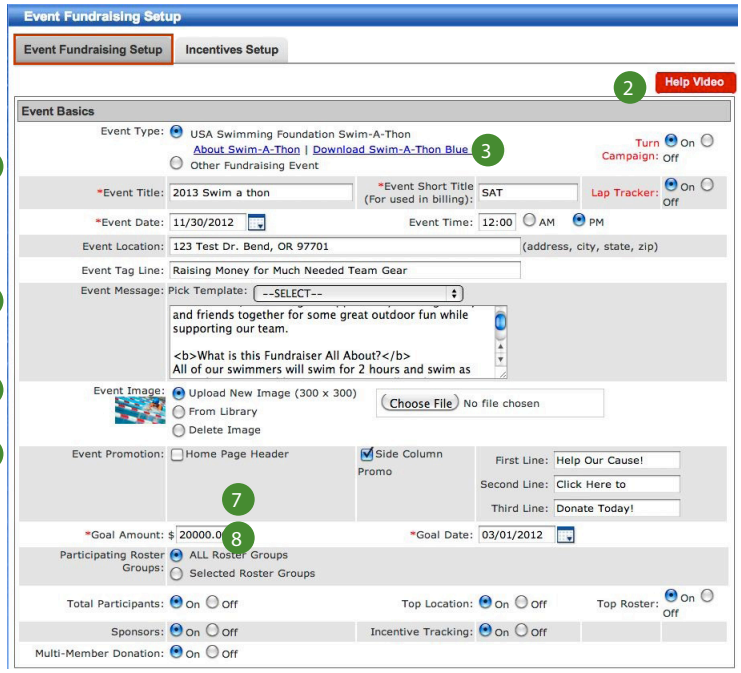
4. **Add New -** Select this button to begin creating your fundraising event.

5. **Set as Current** - Place a check mark to the left of your event that you have setup and select the 'Set as Current' button to ensure that event is the only active fundraising event. Only one fundraising event can be turned on.

6. **Event Information -** Title of all fundraising events with the current one noted in red. Status confirms if your event is currently on or off/start date is the date set by the administer to begin, Goal and participating donors shows the team goal set and how many donors are currently participating in this event.

7. **Report | Lap Tracker | Promote** - Select the Report tool to generate a series of reports including your USA Swim-A-Thon (tm) report for submission. Lap Tracker will allow you to easily update your athletes laps swum. Promote gives you the tools to promote this event fundraiser to your team.

Event Fundraising Admin



Tips and Tricks

It is critical that you spend time to setup this piece accurately. All of the tools are here to implement your TUMoney system quickly and professionally. Use a tag line, decide on a great Event Message or pick a template to help you get your fundraising system up and running. Upload images to help your branding and add your promo lines to build a theme.

1. **Event Basics -** Enter in the necessary details to begin your setup. It's critical to select whether this is a USA Swimming Swim-A-Thon or team sponsored. If USA Swim-A-Thon is selected, the fundraising module will have additional functions which include a different waiver/agreement and different USA specific reporting tools and incentive programs.

2. **Help Video -** The TeamUnify Help videos can be found throughout the fundraising system. Select this button to watch a short tutorial on how to administer this module.

3. **Turn Campaign/Lap Tracker -** Ensure you have turned on your current campaign when you are ready to release it to your accounts and potential donors and off when it's complete. The lap tracker is turned on/off depending on how you are running your fundraising event.

4. **Event Information -** This information will appear on the fundraising home page. You have the option of selecting a TeamUnify pretemplated message for the event message that the admin can edit or simply click into the edit box to create your own.

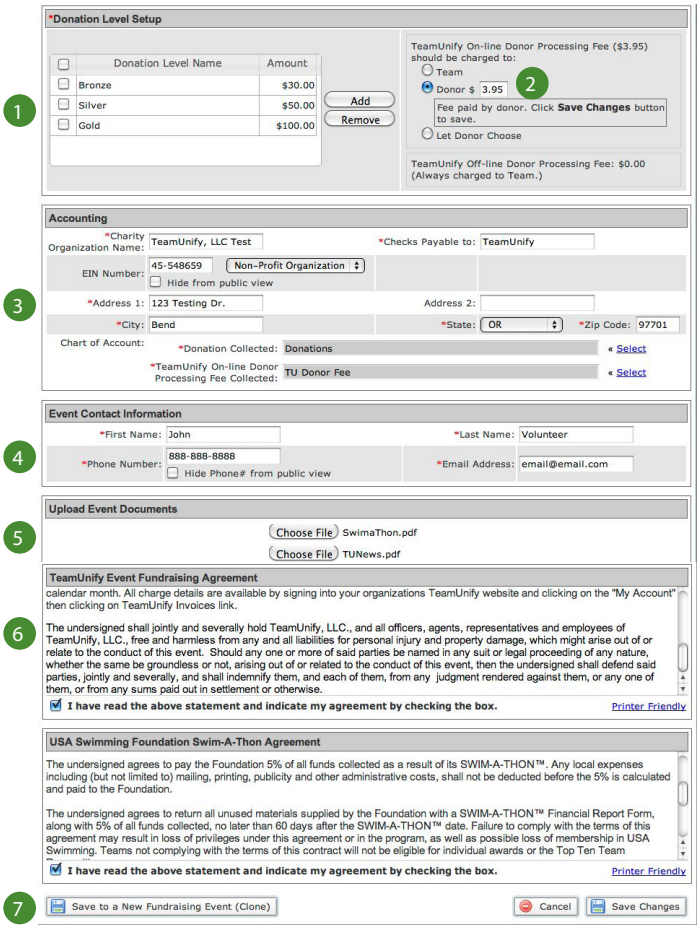
5. **Event Image -** Chose your own 300x300 sized image or from the TeamUnify library. This picture will appear on the fundraising home page when you select the "Click for more information on the Event Title" option.

6. **Event Promotion -** Make your checkbox selections to place your First/Second/Third line information in the designated areas.

7. **Goal Information -** Place your Goal Amount and Goal date into these fields. This information will propagate throughout the system from the lane progression bar to promotional e-mails. Enter in carefully.

8. **Event Additional Information -** Decide what additional information will be publicly viewable. You have the option to show/hide the total participants, sponsors center, Incentive Tracking tab, top location and roster groups as set in your membership database.

Event Fundraising Admin



Tip and Tricks

Don't be shy to add Donation levels! Try using names that represent your team like, "Olympic Level". When donors aren't sure what to donate or what amounts are expected, this helps to provide them with a denomination that fits their budget.

Don't forget to really look at whether you will pay the processing fee, let the donor or let the donor choose. It's important to make this a business decision.

1. **Donation Level Setup -** Use the Add button to add donation levels. Donation level are viewable to donors and offer a predefined dollar amount.

2. **TeamUnify On-Line Donor Processing Fee -** TeamUnify charges a $3.95 online donor processing fee and a $1.00 offline fee if you do not have the gear store on. The team needs to make a business decision whether the team will be responsible for this fee or the donor exclusively or if the donor can make the decision.

3. **Accounting -** Populate the fields with the important accounting information to be viewable to the donor and to propagate through your Chart of Accounts correctly.

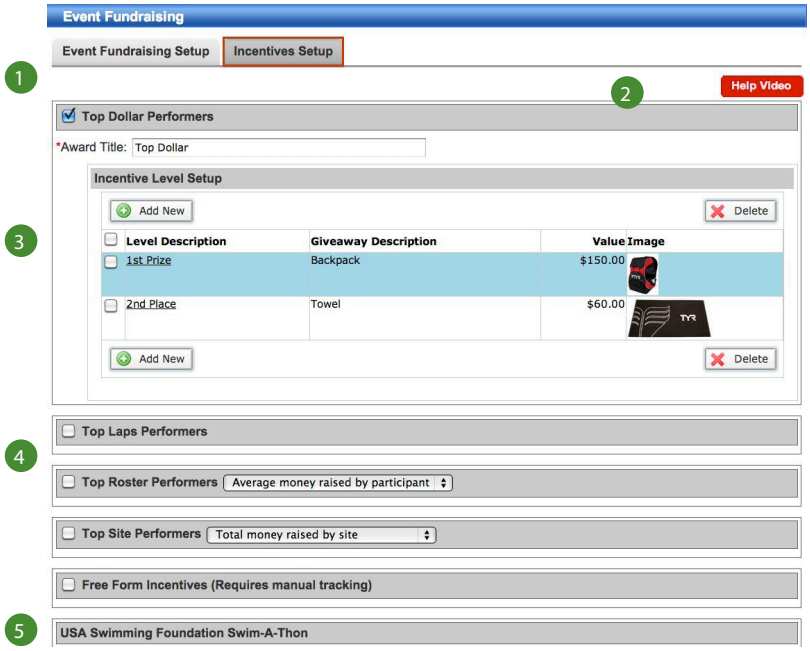
4. **Event Contact Information -** This information will appear to the donor for event contact purposes. Ensure you populate these fields with the necessary information. Check the box, "Hide Phone# from public" view if you do not want to offer this information.

5. **Upload Event Documentation -** Upload any documentation that if important to this event. All documentation will be available to both logged in and not logged in users.

6. **TeamUnify Event Fundraising Agreement -** You must agree by selecting the box to use the TUMoney platform. If this is a certified USA Swim-A-Thon fundraiser you will also be required to electronically sign their agreement.

7. **Save to a New Fundraising Event (clone) -** Make any necessary updates and select this button to clone the current fundraising platform.

Incentive Setup



Tip and Tricks

Incentives are a great way to build excitement and competition within your team. Fundraising can be difficult but offering rewards helps your athletes have a goal to obtain and a tangible object for their hard efforts. Use the different levels to ensure you can give each athlete something to work towards.

1. **Incentive Setup -** Use the Add New within each incentive to add your level description, giveaway description and upload an image if applicable. The incentive levels will appear for your participants showing both what they have achieved and how far away they are from the next level.

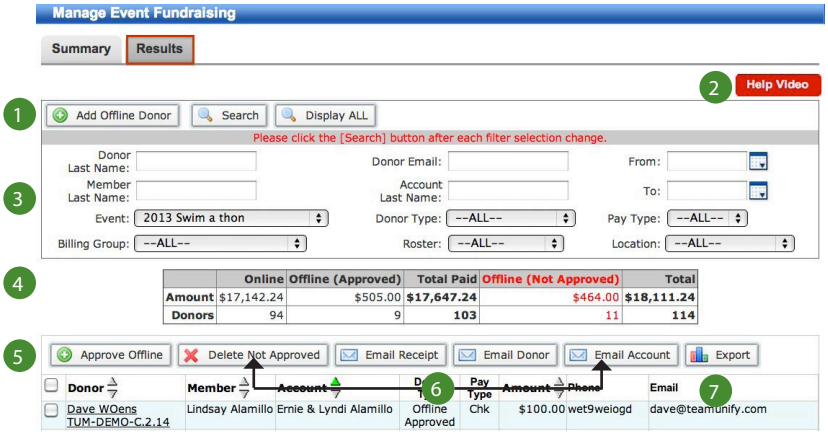
2. **Help Video -** Select the red Help Video to watch a short tutorial on setup of this piece of the TUMoney module.

3. **Summary View -** Viewable breakdown of levels that have been setup.

4. **Incentive Options** - Place a check mark in any incentive level you wish to offer. This will allow you to setup, add images and descriptions.

5. **USA Swimming Foundation Swim-A-Thon** - This will be prefilled with all Swim-a-Thon incentives.

Tracking & Management



Tip and Tricks

Don't forget to thank your donors for their generous donation and let them know how the money has helped your organization. Use the filters, select your donors and press the email button to send a free form thank you email.

1. **Add Offline Donor -** Select this button to add an offline donor.
2. **Help Video -** The TeamUnify Help videos can be found throughout the fundraising system. Select this button to watch a short tutorial on how to administer this module.
3. **Filters -** Use the filters to narrow down your search. Select Search to implement the filter set.
4. **Financial Summary -** Based on your filter set, this summary will show the admin the resulting financials.
5. **Approve Offline -** All offline donations must be approved by the admin before they are calculated towards the participant and applied to the team donor financials.
6. **Selections -** Place a check mark next to one or many donors and select the corresponding button to perform your action. The buttons will no work without first making a selection.
7. **Export -** The Excel Export will generate a spreadsheet with all Donor/Account/Member information.

Notes TUMoney

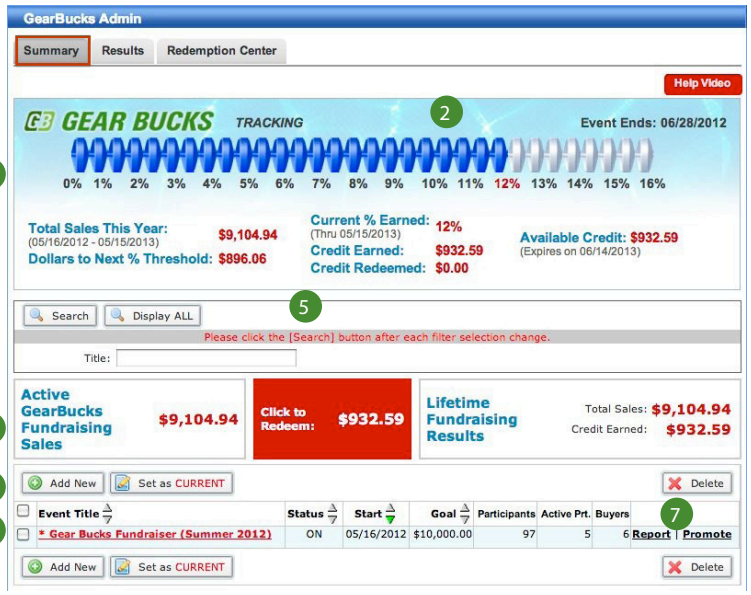
Notes

Gear Bucks Fundraising Admin

What you'll learn in this Section:

- How to setup your fundraising system
- How to set up your Incentive Levels
- Management & Tracking
- Tutorial Gear Bucks Overview
- Tutorial Redemption Center

Gear Bucks Admin



Tips and Tricks

The promote tool contains a rich set of email functionality specifically designed to help your team get your members involved! Use the pre-templated emails to instantly help you to generate excitement for your fundraiser.

1. **Gear Bucks Tracking** - This will give you your summary of your Gear Bucks account including your total sales, what it will take to meet your next threshhold, credits earned and redeemed, etc.

2. **Lane Line Progression Meter -** Your team is initially set at a percentage of Gear Bucks that you will earn on each purchase. This will adjust as you reach your next dollar threshhold. The lane line is your indicator of where you are and where you could be.

3. **Active Gear Bucks Information -** Select the Red "Click to Redeem" to take you to the Gear Bucks gear redemption module. Lifetime Fundraising results keeps you informed of your total lifetime sales and credits earned.

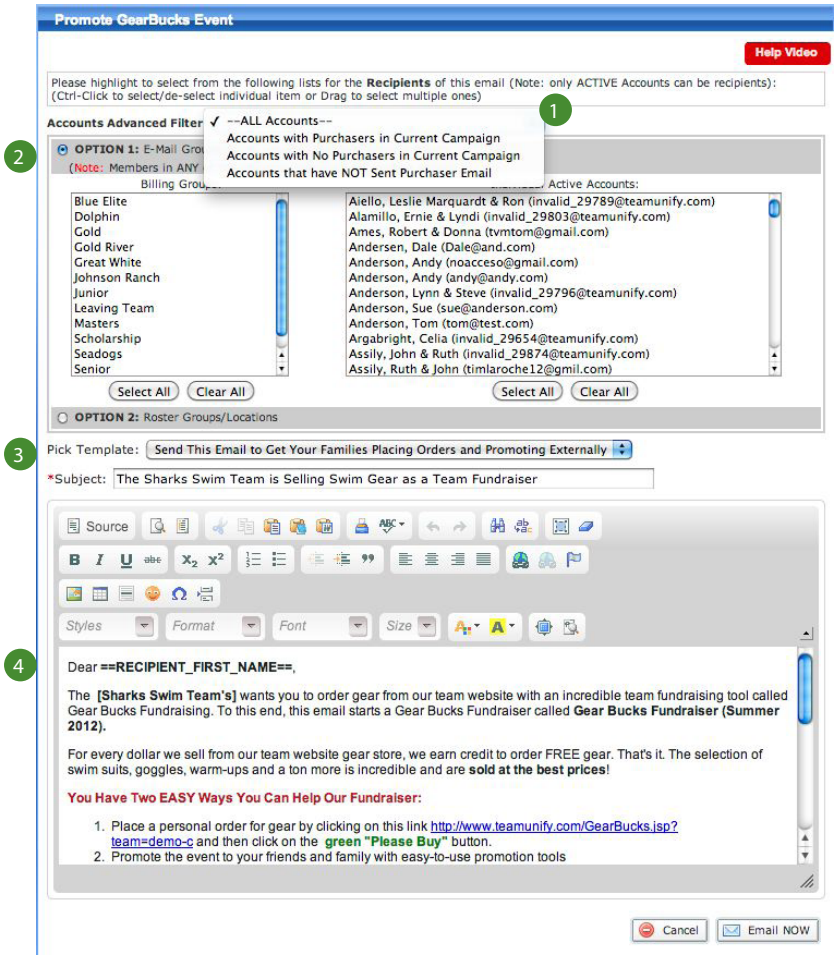
4. **Add New** - Select this button to begin your campaign.

5. **Set as Current** - Place a check mark to the left of your event that you have setup and select the 'Set as Current' button to ensure that event is the only active fundraising event. Only one Gear Bucks fundraising event can be turned on at any given time.

6. **Event Information -** Title of all fundraising events with the current one noted in red. Each column gives you dynamic, viewable reporting functionality on your event and its activity.

7. **Report | Promote** - Select the Report tool to generate a series of reports. Promote gives you the tools to promote this event fundraiser to your team.

Gear Bucks Marketing



Tip and Tricks

Don't forget to use the Advanced filter to help you sort your email list. Wait 15 days from the start date of your campaign and send a freeform email to anyone that has not sent out an invite and remind them how great this fundraiser is!

Remind everyone that Gear Bucks helps everyone on the team and by purchasing through your store, they are making your team stronger.

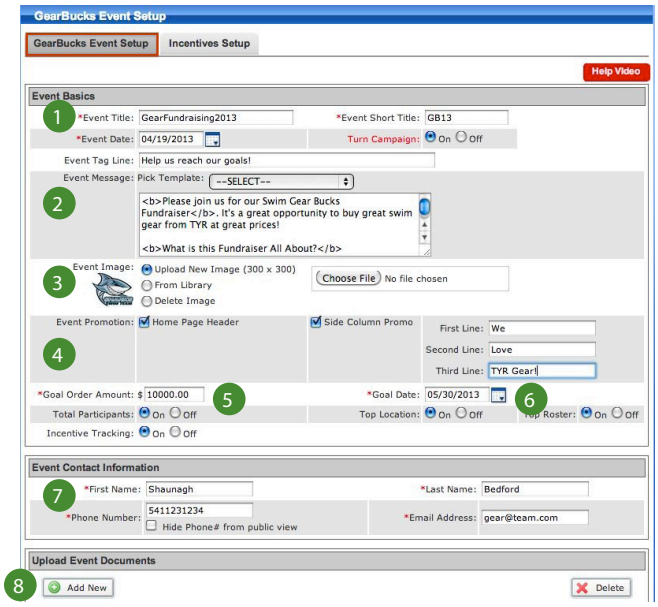
1. **Accounts Advanced Filter** - Use the dropdown to filter your accounts viewable. You can email based on activity in the fundraising campaign.

2. **Option 1/Option 2 -** This piece is built like the standard email center found on TU. Select your accounts by option 1 or 2 depending on how you need to promote this campaign or leave all filters set to all Active Accounts.

3. **Pick Template -** TeamUnify has included pretemplated campaign promotion material that you can edit by selecting the text or simply begin typing into the body of the email to send your own promotional material.

4. **Enter into the body of the Email and select Email Now to begin earning purchases towards your Gear Bucks!**

Gear Bucks Setup



Tips and Tricks

It is critical that you spend time to setup this piece accurately. All of the tools are here to implement your Gear Bucks system quickly and professionally. Use a tag line, decide on a great event message or pick a template to help you get your fundraising system up and running. Upload images to help your branding and add your promo lines to build a theme.

1. **Event Basics -** Enter in the necessary details to begin your setup. All of these options will show to the public view so think about what you would like your Event Title to be and ensure you turn your Campaign ON.

2. **Event Message -** This information will appear on the fundraising home page. You have the option of selecting a TeamUnify pretemplated message for the event message that the admin can edit or simply click into the edit box to create your own.

3. **Event Image -** Chose your own 300x300 sized image or select one from the TeamUnify library. This picture will appear on the fundraising home page when you select the "Click for more information on the Event Title" option.

4. **Event Promotion -** Make your checkbox selections to place your First/Second/Third line information in the designated areas.

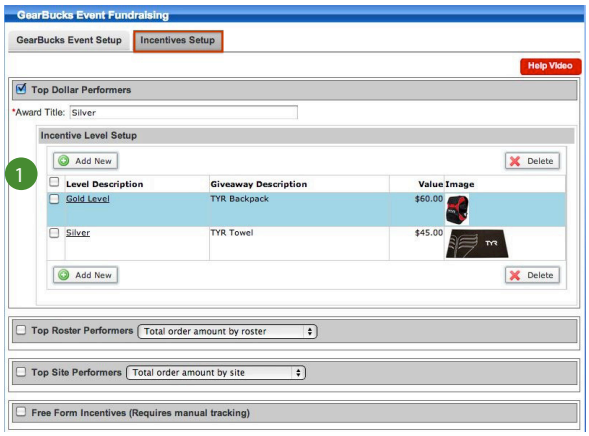
5. **Goal Order Amount-** Place your Goal Amount and Goal date into these fields.

6. **Event Additional Information -** Decide what additional information will be publicly viewable. You have the option to show/hide the total participants, Incentive Tracking tab, top location and roster groups as set in your membership database.

7. **Event Contact Information** - This information will be viewable so ensure it's the person that will be responding to fundraising questions.

8. **Upload Event Documents** - Select 'Add New' if you have documents that your membership needs to download that pertain to this campaign.

Gear Bucks Incentive Setup

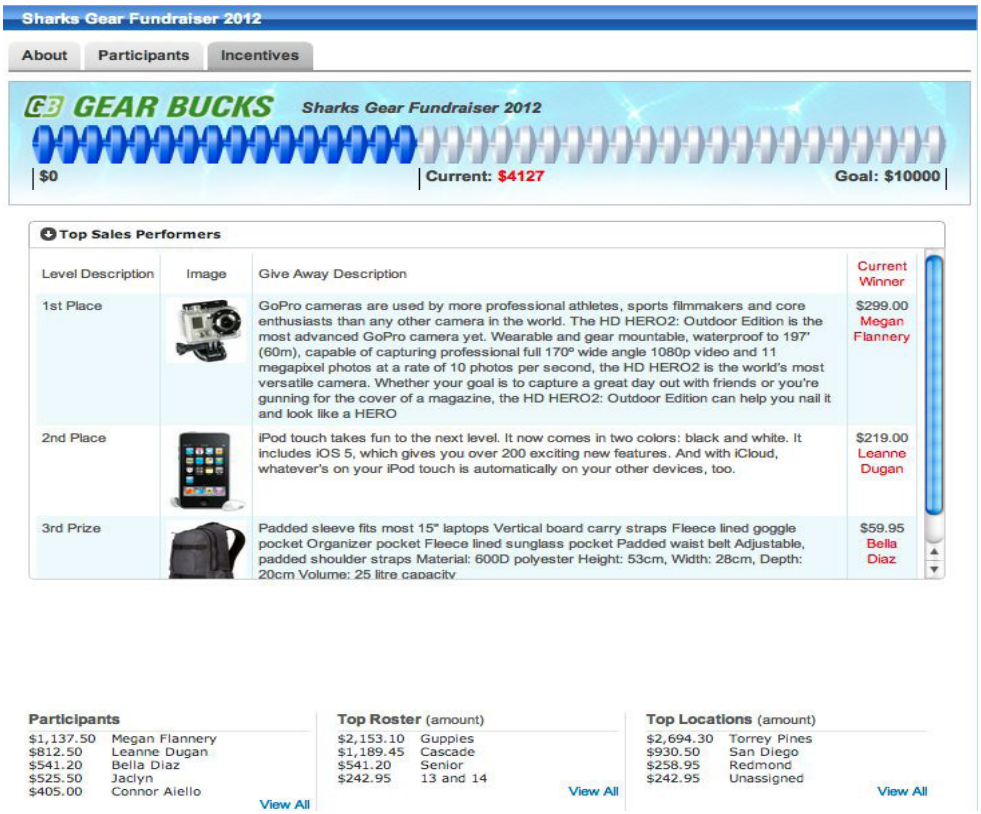


Tips and Tricks

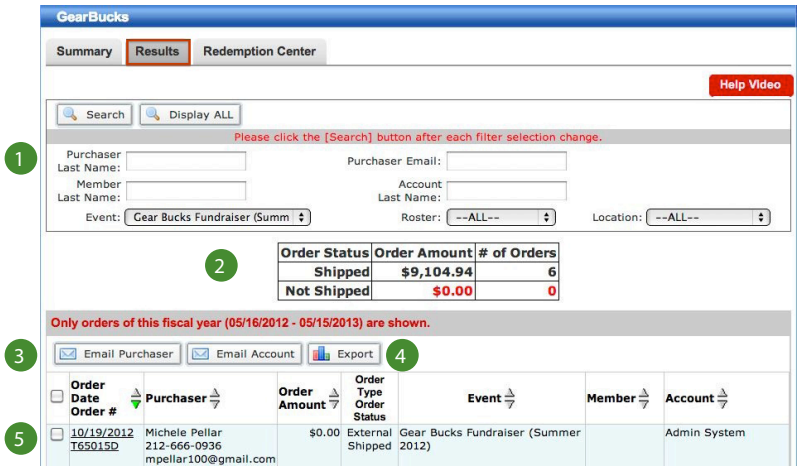
Incentives breed competition so see if you can come up with some great prizes. Kids love to compete for the next level and the sense of accomplishment when it's reached is priceless.

1 **Incentive Setup -** Place a checkmark in the box to the left of the type of incentive level to open up the admin functionality. You have the option of how you wish to track; Total order amount by Roster or Average order amount by participant. Decide on an Award title and then select Add New to setup the different incentives your members can receive.

Below is the Participant View relating to the incentives.



Gear Bucks Tracking & Management



Tips and Tricks

Don't forget to thank your purchasers for helping your team reach its goals. Let them know what the Gear Bucks will help to purchase. Use the filters, select your purchasers and press the email purchasers to send a free form thank you email.

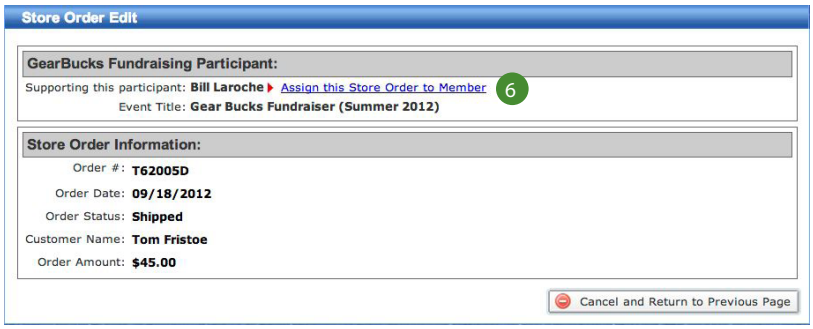
1. **Filter -** Adjust your filters to locate specific purchasers and select 'Search' to apply or Display All to view all.

2. **Order Status Summary -** This order summary will update with Not Shipped upon purchase and update accordingly once they are shipped by the software. This is automatically updated and cannot be adjusted by admin.

3. **Email Functionality -** Place a check mark in the box to the left of the Purchaser/Account line and either select 'Email Purchaser' to email the purchaser of the items or select Email Account to email the account that the fundraising dollars are associated with.

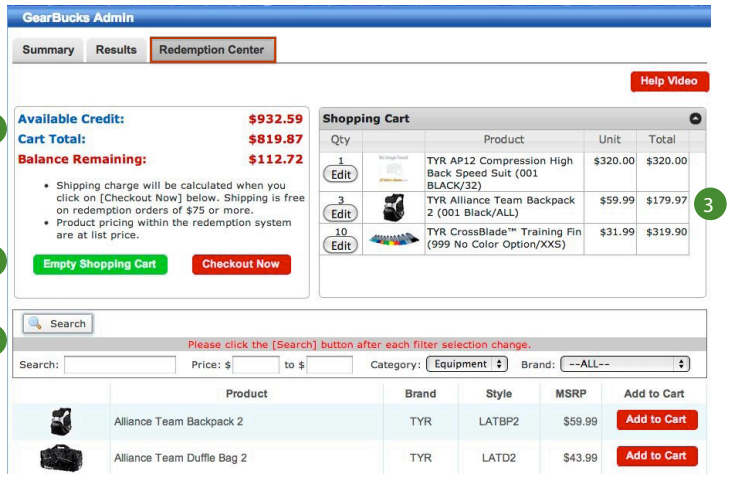
4. **Export -** This Export generates a spreadsheet that will contain Purchaser information, Account/Member Information, Order History, Order Status and Event Information.

5. **Store Order Edit** - Select the Order # to Edit the account that the purchase has been applied to.



6. **Participant Support** - Select 'Assign this Store Order to Member' to re-assign this order if it's incorrect. Use the 'Select' to find your member and place into the field. Select 'Assign Now' to apply. If you have made an error, select 'Cancel and Return to Previous Page' to release assignment.

Gear Bucks Redemption Center



Tips and Tricks

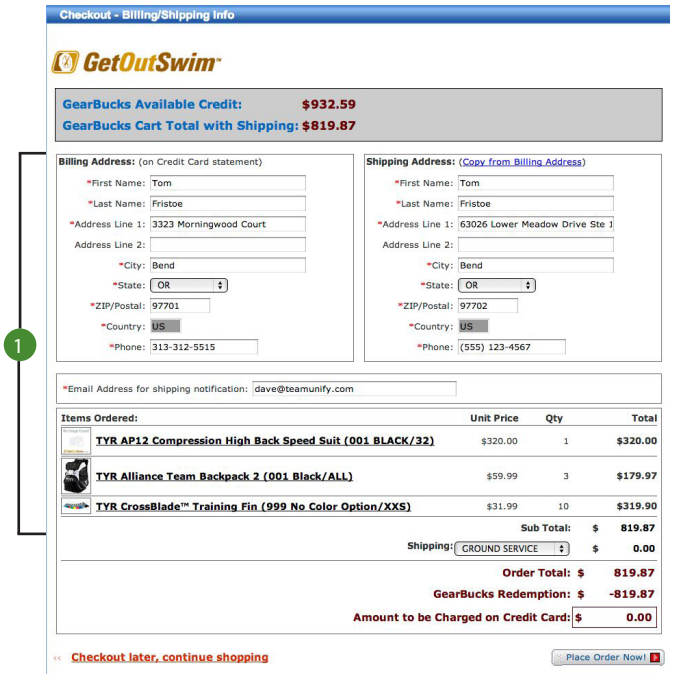
If you aren't too sure what to purchase, think about buying items and selling to your members for real dollars. Real dollars are always needed for swim teams and can be put towards other costs like travel, pool maintenance etc.

1. **Redemption Credit Summary -** This is a summary of your Gear Bucks. Don't forget you are purchasing at MSRP prices and not the discounted cost you may receive if purchasing without Gear Bucks through your store.

2. **Store Filters -** You must set your filter to bring up available products. The products must be in stock to order. Select Add to Cart to update your redemption summary area and place in your shopping cart view.

3. **Shopping Cart** - View of your current selection for purchase with your Gear Bucks. Select Edit under the Qty column to update.

4. **Shopping Cart Edit** - Select 'Empty Shopping Cart' to clear all selections or 'Checkout Now' to apply your redemption Gear Bucks and place your order.



Tips and Tricks

To generate even more money you could use your gear as a raffle option and sell tickets for your redeemed products. There are so many options for using your GearBucks redemption dollars..get CREATIVE!

1. **Checkout** - Confirm your order and select 'Place Order Now' to finalize your Gear Bucks purchase. If you have money owing after you have applied your redemption credits, you will be asked for credit card details within this screen.

Notes TUMoney

Notes

SpiritWear™

What you'll learn in this section

- How to setup your SpiritWear
- How to setup your three different stores; Main, Event, & Registration
- Bulk Ordering and Administration
- Promote! Promote! Promote!
- Order Fulfillment

Tutorial Configuration & Main Store Setup

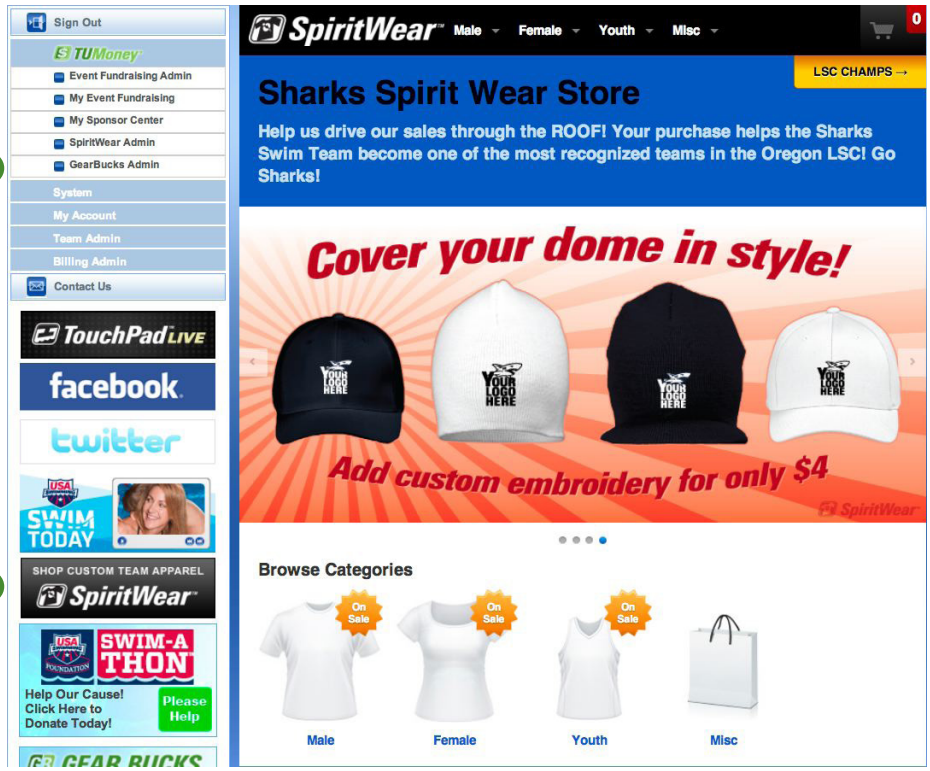
Tutorial Creating your Special Event/Registration Store

Tutorial Store Management & Bulk Order Release

Tutorial Promote! Promote! Promote!

Tutorial Bulk Ordering - Fundraising with Ease

SpiritWear Getting Started



Tips and Tricks

You are going to a Championship Meet? Send TeamUnify the Championship logo or tag line to load into your SpiritWear store. Now create a special events store to sell all of the products to celebrate your team's hard work!

1. **SpiritWear Admin -** You will setup your SpiritWear configuration including banner colors, % commission and product line for the main store.

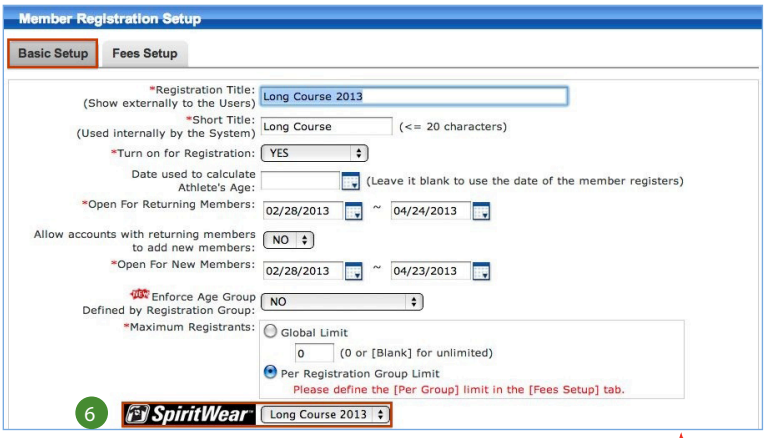
2. **SpiritWear Portal -** This will appear once the store is open and will allow the public to access either your main store or your special event store.

3. **Banner -** Your banner including text, background and font color is controlled by the admin in the setup.

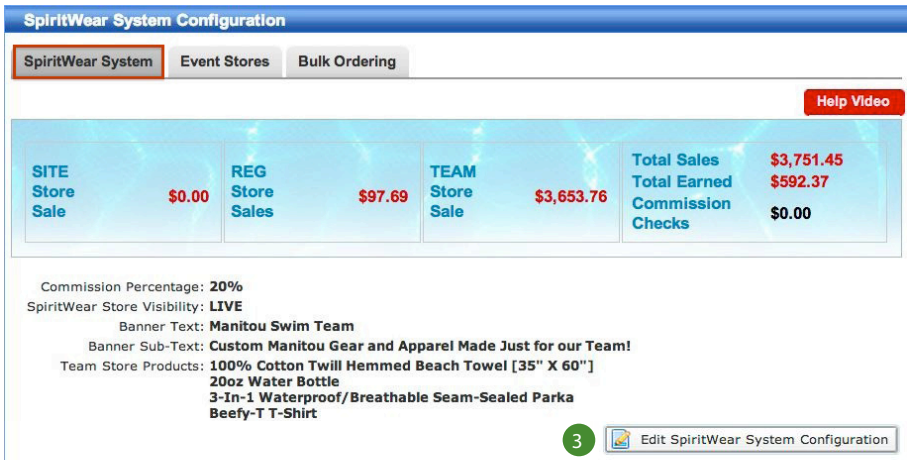
4. **SpiritWear Main Store -** Your main SpiritWear store that will sell all of your SpiritWear gear which you setup in the SpiritWear admin area.

5. **SpiritWear Event Store -** The Event Store can be setup for special inventory events for instance LSC or League Champs.

6. **Event Reg -** Once you create an event for your registration system, you will apply it in the actual registration setup. Simply toggle the SpiritWear option to the correct event registration you created.



SpiritWear Admin



Tips and Tricks

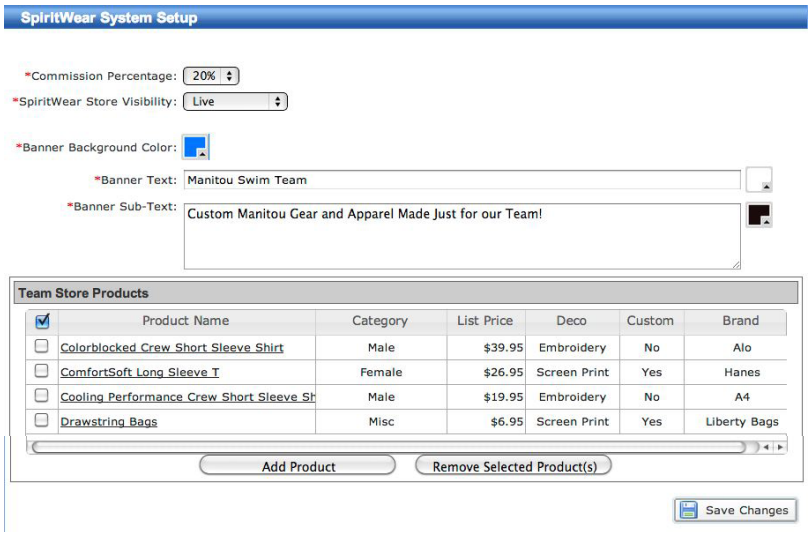
Check this screen frequently to see how well your fundraiser is progressing and watch your commission check grow quickly!

1. SpiritWear System - Your first tab once you select SpiritWear Admin. This is where you will setup your main store and commission information.

2. SpiritWear summary - All store financial information will be viewable in this summary including your total sales, total earned and if you have received any commission checks from TeamUnify.

3. Edit SpiritWear System Configuration - Select this button to setup your main store. See screenshot below for further setup instructions.

4. Setup Summary - The summary will show you what you setup in your system configuration.



Tips and Tricks

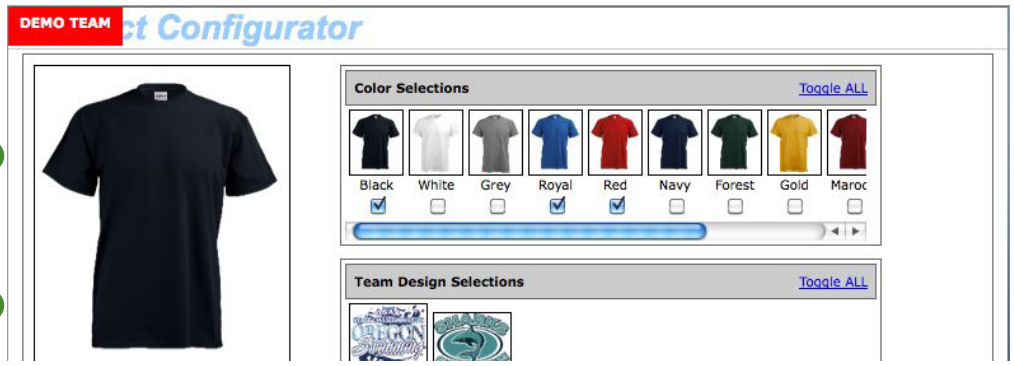
Remember your commission percentage is what drives your rebate check. Discuss with your team where to set the percentage. Every dollar you earn is a great way to fundraise for something specific. Perhaps make a list of what it is that your team requires and then make a business decision as to what will not only drive customers but will also raise the required $ amount.

1. Main Setup -
   - *Commission* - Select the commission percentage you will receive for the team. This will mark the cost up on the products by the same percentage you control. For example the product list price is $15, your commission is set to 20% you resale at $18 and receive $3 back as a rebate check.
   - *Visibility* - SuperUser Admins only until you are ready to make it public
   - *Banner* - Select the store background color, text and sub text for the public view.

2. Team Store Products - **NOTE** All products, colors, and logos will be defaulted ON. Select Add Product (see figure A) to add the products. Use Remove Selected Product(s) to remove from the main store. Select the product to **edit (select/deselect)** product color and logos you will offer.

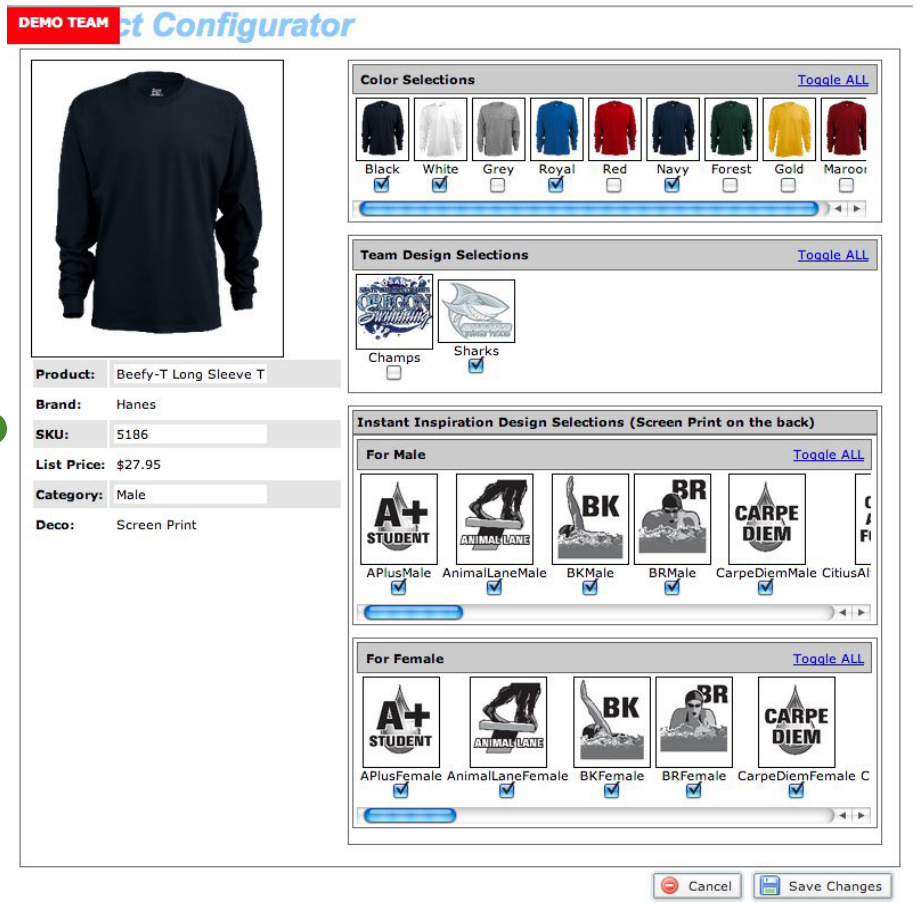
SpiritWear Product Selection

Figure A



1 **Filter -** Use your filters to locate specific merchandise. All merchandise is loaded by TeamUnify. You cannot add your own logo gear. This is SpiritWear specific.

2 **Product Selection -** Place a check mark to the left of an individual product and click select to configure as shown below.



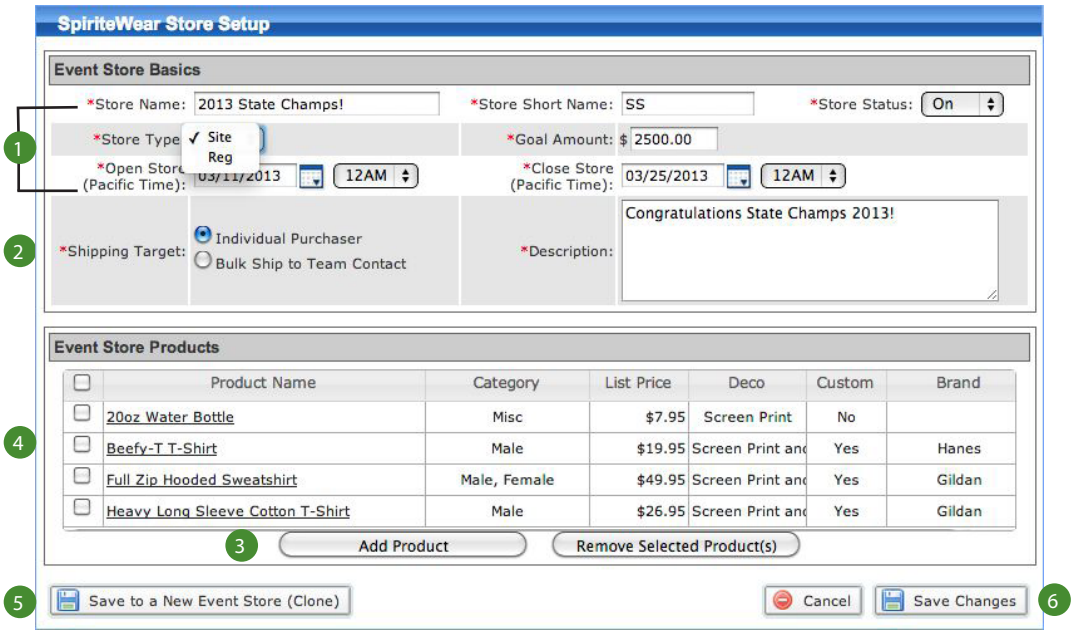
Tips and Tricks

Your team design selection is part of the SpiritWear package. TeamUnify will ensure your logo is of the highest quality and will offer you different options and selections of the same logo. You will find them all here to offer for the product. What a great way to offer gear specific to not only your team but what about special meets or feats that you have achieved! The sky is the limit so let TeamUnify's in house designers make your team stand OUT!

3 **SpiritWear Product Configuration -** What you select in this area will result in the product selection on the public side. Chose only the colors you would like to be made available. Next select the logo(s) which TeamUnify has loaded for selection. We also offer an inspiration logo collection that can be placed on the back of the product. Toggle all or just specific selections to be available

Save Changes - Once you have saved changes make another product selection until they are all loaded.

Event Store Creation (Reg/Event)



1. Event Store Basics - **The event store is for logged in users only!**
   - Store Name - This is what your logged in team members will see within your SpiritWear Store if it's store type 'Site' or they will see this name in the registration system if type, 'Reg'.
   - Store Short Name - This will appear to the admin
   - Store Status - On/Off or Stage. Stage will allow you to view it before making it live to your members.
   - Store Type - Site/Reg. Site means it will appear in your SpiritWear store (a store within a store) and Reg means you will attach it to your registration module to be implemented during registration.
   - Goal Amount - The fundraising dollar amount you would like to reach for this event.
   - Open Store/Close Store - This event store will not open or close until the dates/times you set. NOTE this is Pacific Time. User your filters to show your stores based on this parameter.

2. Shipping Target - **NOTE** once you have made this selection and saved changes, it cannot be updated - Individual Purchaser means all orders are sent to the purchaser. Bulk Ship to Team Contact means that all orders will be bulk shipped to the team for distribution to the individual purchaser on store close date. Admin must release this bulk order (see page 8 on releasing bulk orders.)

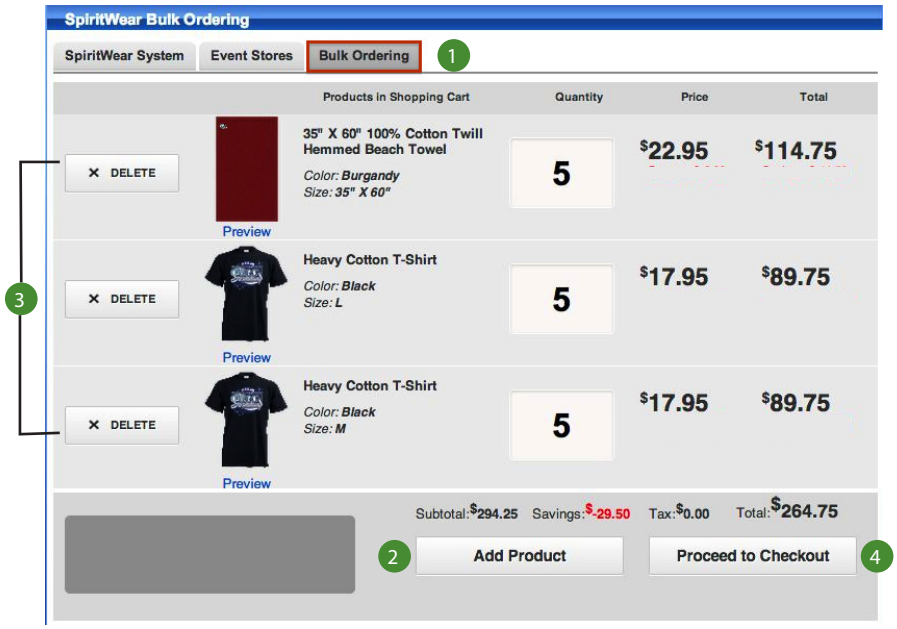
3. Add Product - Select this to add your product into this event. See previous setup instructions.

4. Event Store Products - Select product name to **EDIT** or view summary detail of product.

5. Save to a New Event Store (Clone) - **MAKE ANY CHANGES FIRST** and then select Clone to create an identical event with current loaded products and new updated information.

6. Save Changes - Don't forget to select Save Changes or your event will not be created or updated.

Bulk Ordering



Tips and Tricks

The bulk order tab is a great way to sell SpiritWear gear at a meet for instance. Order it online, have it ready for the meet and watch as you generate more fundraising dollars for your club.

The bulk order functionality has no limit to how you can use it. Be creative!

1. **Bulk Ordering**** - You can easily add bulk order gear from this module. This works well for manual order forms that you might have distributed. Remember you will pay for the entire order including shipping at time of checkout. It will be up to your team's process to invoice, collect monies and distribute the gear ordered.

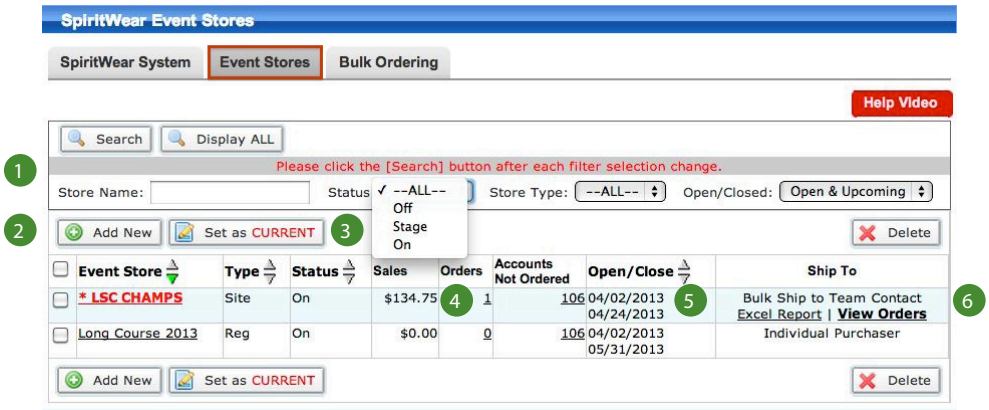
2. **Add Product** - Select Add Product to select the product to place in your shopping cart. Once you select the product from the product selector area, you will be able to select color, size etc.

3. **Product Detail** - Once you add a bulk order into this module, you will be able to update the quantity and view all other details including price, discounts and total cost of item.

4. **Proceed to Checkout** - When you bulk order is complete, select proceed to checkout to enter payment details and send to the SpiritWear distribution center.

** Bulk ordering is not part of the commission functionality. You will receive the lowest price available on all bulk orders.

Event Stores Admin



1. **Filter -** Use your filters to locate specific event systems. Make your selections and search for results.

2. **Add New -** Select Add New to create your event store or your store to connect to online registration.

3. **Set as CURRENT -** Place a check mark to the left of the **Event** store you want to be set as current in your SpiritWear store. This does not pertain to a **Reg** SpiritWear store. You will connect your individual reg stores to your registration system within the online registration module on the setup screen.

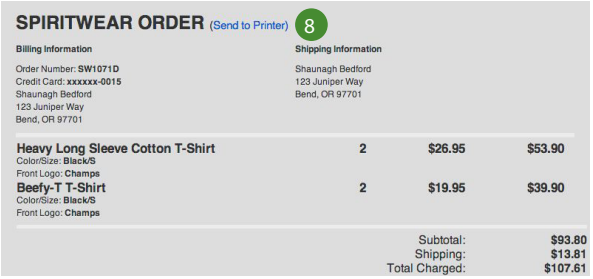
4. **Orders/Accounts Not Ordered -** For orders select the number to open up the orders screen (see figure A below). For Not Ordered select the number (which denotes how many accounts have not ordered) to open up the **Promotion and Marketing Tools!** See page 9 for instructions on how to get started.

5. **Open/Close -** Within the setup of each store you can denote when it will open and close

6. **Ship To -** (See Page 8 on releasing your bulk order) **-** You need to setup each event store to either have the gear mailed directly to the individual purchaser or Bulk Ship to single address. If you select individual purchaser the shipping will be charged directly to the individual at checkout. If you select Bulk ship then the shipping will be charged to your team Credit Card at checkout. Bulk Ship Details - When you use bulk ship the system will give you an Excel report from this screen and a View Orders function. Simply select the link to give you details.

Figure A

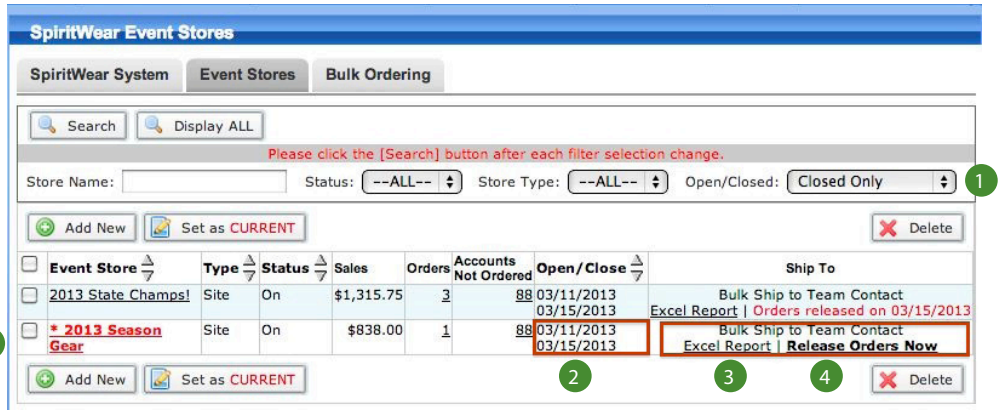
Figure B



7. **Order#** - When you select the number under the Orders column you will receive a summary. Select the order# to be shown the invoice (printer friendly) as in Figure B.

8. **SpiritWear Order** - This is the breakdown, by account, for all products ordered. You can reprint this invoice by selecting, 'Send to Printer'.

Event Bulk Order Release

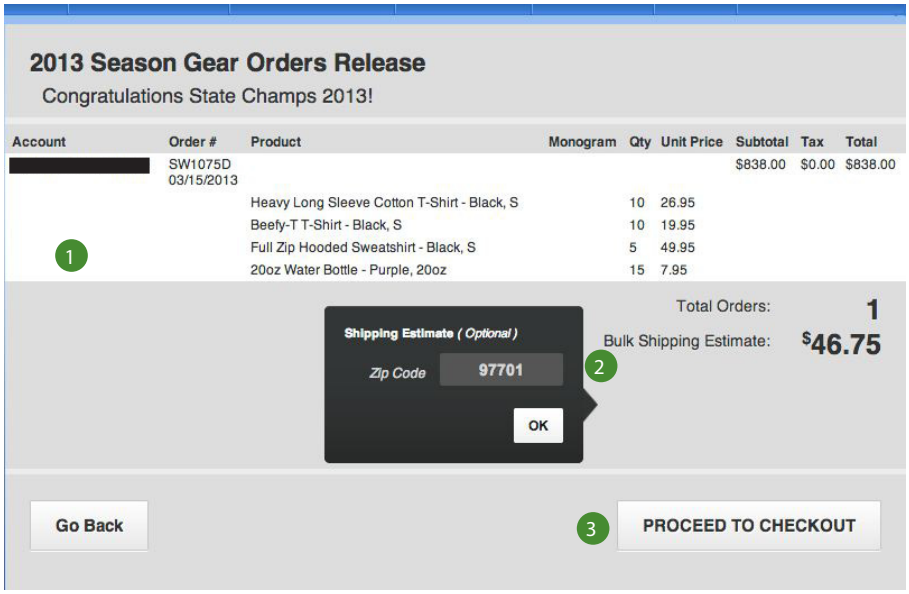


1. **Open Closed Filter -** Set your filter to **Closed Only or All** to see your Bulk Shipment Event which is now ready to be released.

2. **Open/Closed DATE -** Once your event reaches the close date it will be ready to have the bulk order shipped.

3. **Excel Report** - The Excel report contains the individual orders and the details by line item.

4. **Release Orders Now** - When you are ready to send the bulk order to the SpiritWear distributor select this option. You will be required to pay the shipping costs when you go through the process below.

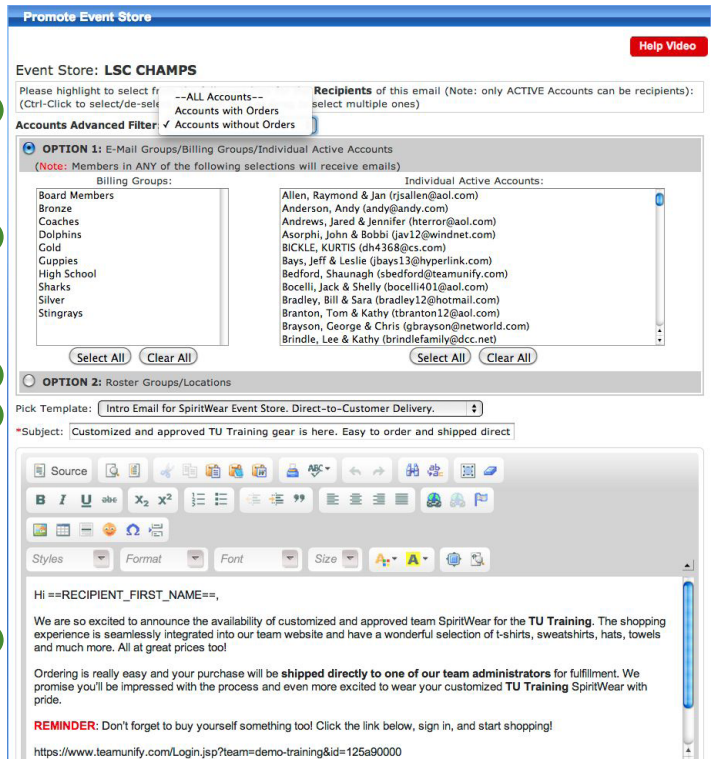


1. **Order Release -** Breakdown of the bulk order by account.

2. **Bulk Shipping Estimate -** Enter in your zip code for your gear delivery and the system will generate a bulk shipping estimate.

3. **Proceed to Checkout** - Once you proceed to checkout you will be required to pick a shipping option and pay using your CC for the shipping fee generated. Once you have paid, the order will be sent to the distributor for fulfillment.

Promote! Promote! Promote!



Tips and Tricks

Promote! Promote! Promote!
TeamUnify has given you direct marketing tools right at your fingertips! Before you do anything, you need to promote your fundraising event to your team! This email will let you select all of your accounts without orders, select the launch email that contains all of your fundraising event information and by simply selecting the button, Email NOW! you are quickly on your way to a successful campaign! IT'S THAT EASY!

1. Accounts Not Ordered - All accounts that have not made a purchase through this event store.

2. Option 1 - This is the default selected by Email Groups/Billing Groups/Individual Accounts - Use the Select All or Ctrl-Click/Command Click to select/deselect individual accounts to send either a free from email or pretemplated email as shown in step 4.

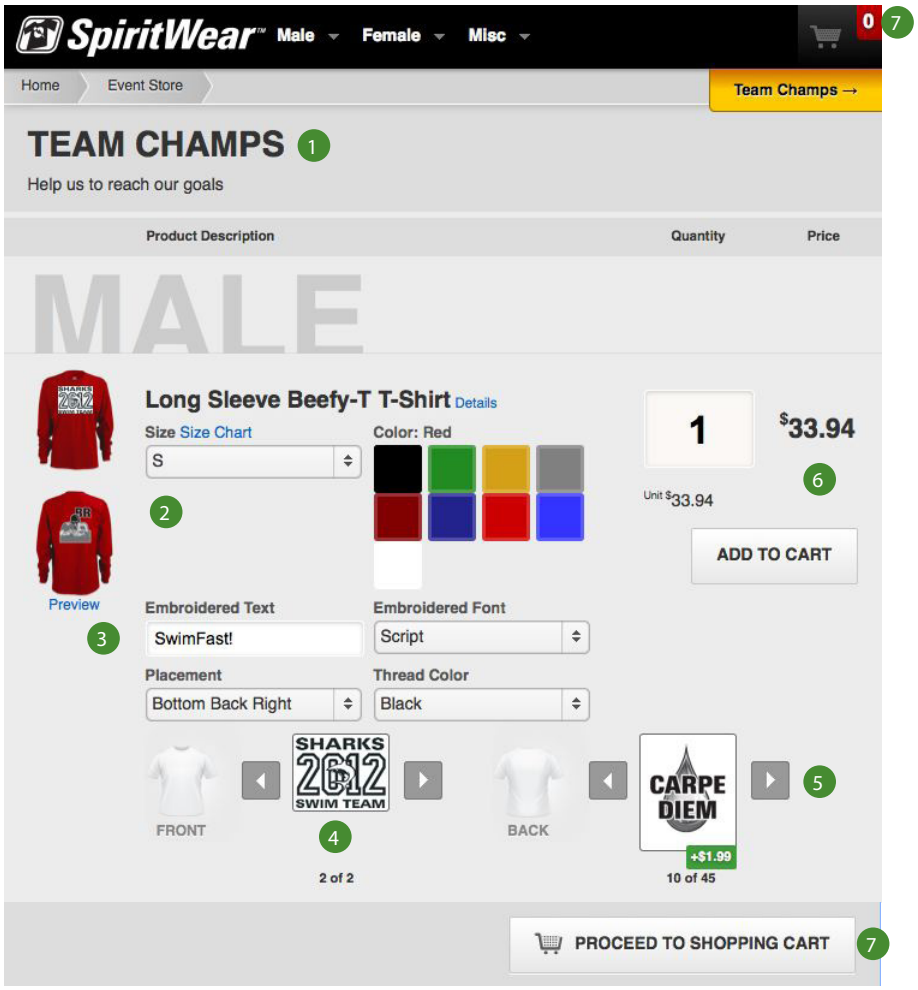
3. Option 2 - This will allow you to select by Roster Group/Location.

4. Pick a Template - Select SpiritWear Launch e-mail to have the e-mail contents pre filled with all of the event information. Simply hit send to market to all of your accounts that have not ordered gear from your SpiritWear event store.

5. Email Body - This will be pre filled with your template if selected in step 4 but you can select and edit or add any content as you deem necessary. If you don't use the template simply type directly into the body.

   Email Now! - Select the Email Now button in the bottom right to quickly get your team involved in your SpiritWear event fundraiser!

Public View of SpiritWear Store



1. **Store Name -** When you select the main store, event store, or reg store this will denote which store you're in.

2. **Product Information -** This area includes a detail and size chart link, your color & size options as well as a preview of what your product will look like based on your selections.

3. **Upsale Options** - Optional items will be listed here. These can include embroidery text/font/thread color, different logo options and inspirational logos to be placed on the back of the product.

4. **Logo Options -** Front of product logo. Use the right/left arrows to view other logo options. Select to preview.

5. **Logo Options (Inspirational) -** Back of product logo. Use the right/left arrows to view other logo options. Select to preview.

6. **Add to Cart** - Enter in your Quantity (cost will update) and Add to Cart.

7. **Proceed to Shopping Cart** - Once all products have been selected proceed to your shopping cart and checkout! EASY!

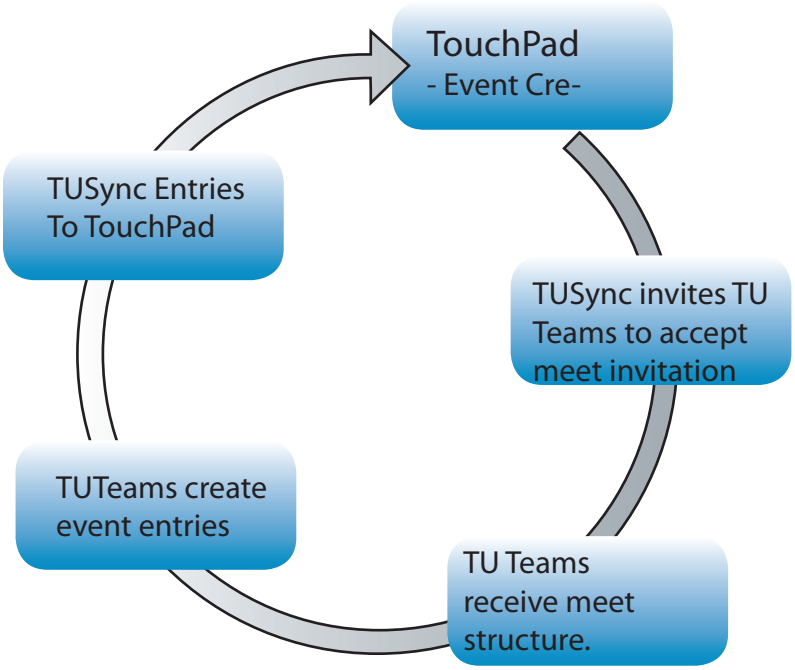
Notes

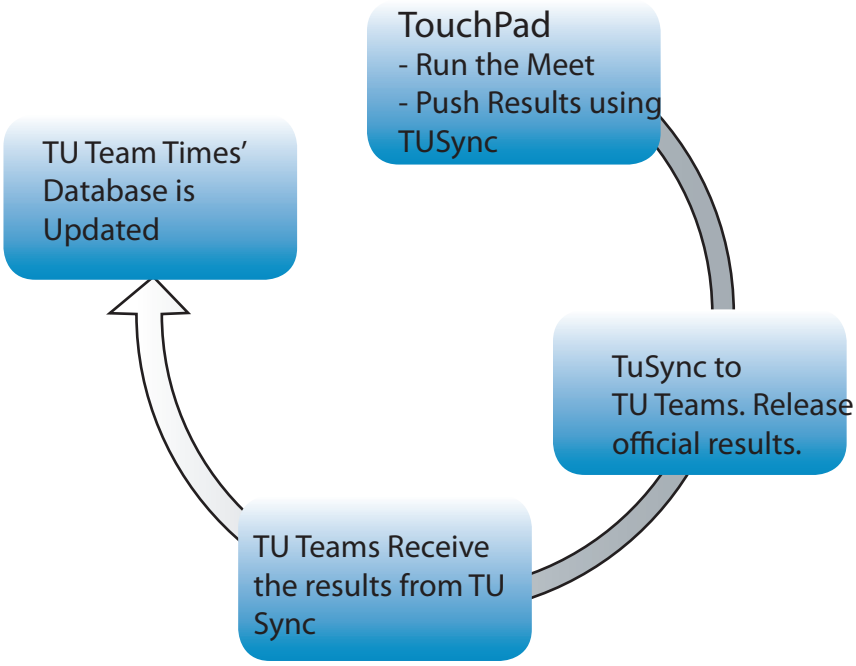
TouchPad - Quick Start Guide

TouchPad Create Your Meet Create Your Events Setup Your Sequences (sessions) Setup Your Time Standards (if applicable) Setup Your Records (if applicable) Setup Your Event Cut Off Times (if applicable)	**Navigation** File > Start New Meet File > Events File > Events/Sequence File > Events/Event Time Standard File > Events/Event Cutoff Times
MeetManagement Software (if you have non TU teams) Create Duplicate Meet (match all parameters) Export Event Entry File Send to Competing Teams	
TeamUnify/Event Entry Software Create Meet TUSync TU Teams Enter Athletes TUSync TouchPad/Meet Host/TUSync	
TouchPad/OnDeck Sync/Import Entries Files Make Entries Adjustments Seed Meet Create Reports Enter Scratches (if applicable) Manage Check-ins with OnDeck Re-Seed	**Navigation** File > TUSync or Import/Preview SD3 Meet Entries File < Athlete Entries Seed Meet Reports & Heat Sheets Seed > Scratch pad File > Manage Check-ins & OnDeck Check-in Seed
TouchPad Setup Timing System (if applicable) Run Meet Generate Reports/Scoring During Meet	**Navigation** Electronic Timer Enter Results Enter Results > Score or Score
TouchPad Create Results Reports Sync Results to TU teams Generate Results File Distribute Results File to non TU Teams	**Navigation** Meet Results File > SYNC NOW File > Export SD3 Meet Results/Entries/SWIMS Email zipped results folder

TouchPad - Lifecycle of a Meet

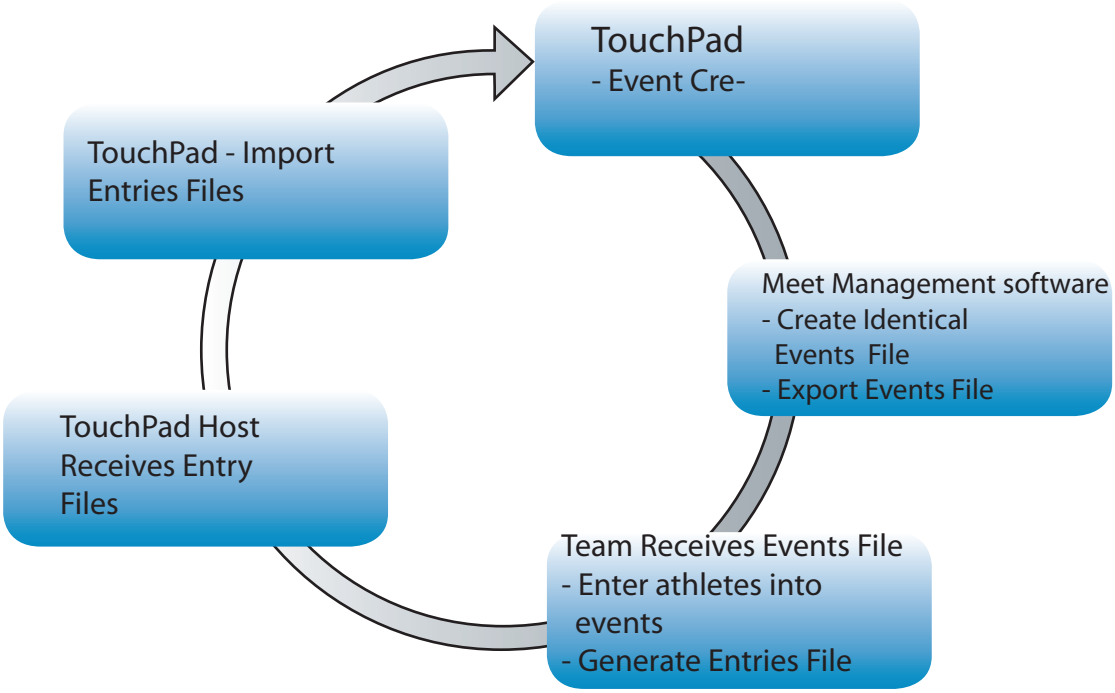
TouchPad - Lifecycle of a Meet for TUTeams

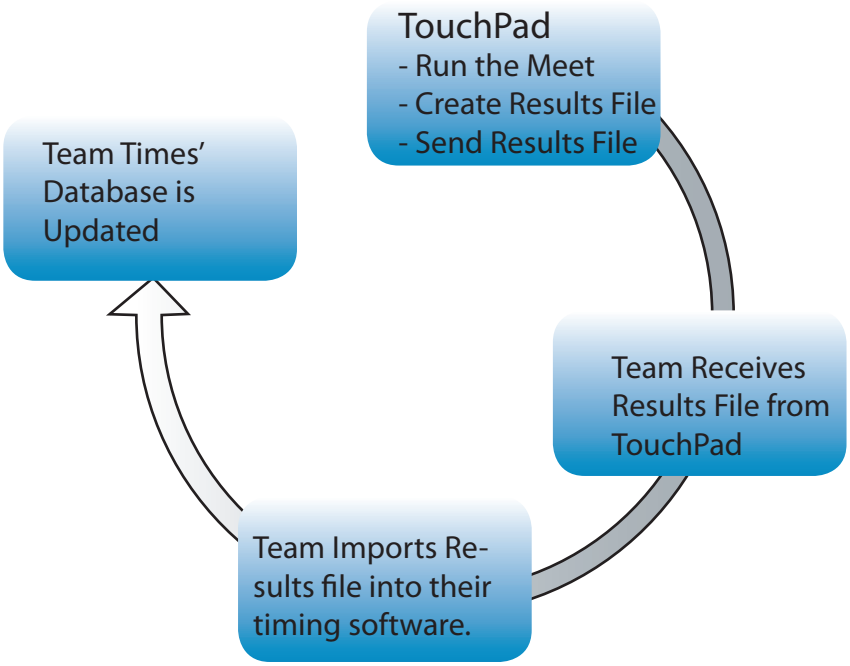




TouchPad - Lifecycle of a Meet

TouchPad - Lifecycle of a Meet (teams not on the TU Platform)





TouchPad - Getting Started

Tips and Tricks

TouchPad runs left to right in its setup. If you follow this direction you will find that the meet setup will be simple and efficient. In addition, many of the options you will find in multiple places so you don't have to go back and forth between screens during setup, event entry, timing and reports.

F1 will bring up Help when you are in a screen.

1. **Ribbon** - TouchPad is built from left to right. Keep that in mind when you are building, running and finalizing your meet. Start with File to create your meet, move to Events to setup parameters, Meet Entries will follow etc. Your last option, Meet Results, will finalize the process.

2. **Turn Syncing ON/OFF** - Select on/off for TUSync. To sync you must have this on and your meet ready to send or receive information. When you are ready to sync you will also need to go to File > Sync NOW or Ctrl+Y.

3. **Meet Information** – Meet name and date that you are currently working on.

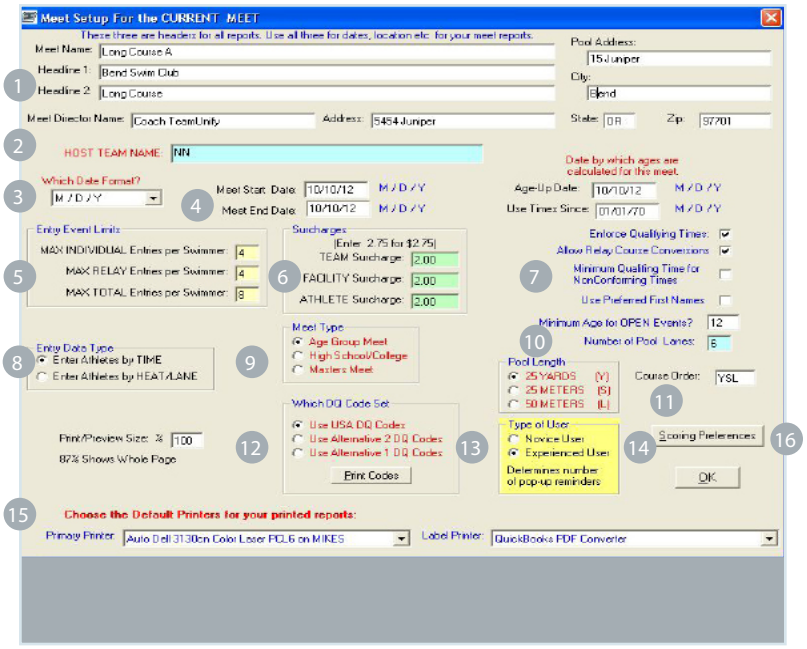
4. **Check for Latest Free Upgrade** - Select this button to ensure you have the latest upgrade to TouchPad. The download utility will walk you through the installation of your upgrade file.

5. **Backup Active Meet** - Backing up your meet is the process of compressing the entire meet into one file. You may backup your meet for safety purposes, to move it to another computer or to email to someone else that has TouchPad. **BACKUP** always backs up the current active meet which is shown on the top of the main screen of TouchPad. If you are running several meets using the same events, creating a backup allows you to use it as a template for future meets. Simply restore the backup when you are ready for the next meet and all of the events, records etc. will restore. It will be **CRITICAL** that you change the meet name and date and your new meet will be ready to accept entry files.

6. **News, Information, Reminders** - TouchPad generated information to help you understand specific features. This is not editable.

7. **Meet Information**- Meet information will include Total Athletes entered, Athletes in events, Individual Entries, Relay Entries, and the Number of Teams.

Meet Setup



Tips and Tricks

You can backup a meet and re-use it each time you need to create a new meet.

Select Restore from your File drop down list, select your meet you backed up and Restore. All events, records, sequences, etc. will be restored. Update any information necessary; for instance your meet name and dates.

1. Meet Setup Information - Enter in your Meet Name, Headlines, and Pool Information. These fields are headers for reports and create a Google map for within the SwimOffice event.

2. Host Team Name – Type in your team name if you are hosting this meet.

3. Which Date Format - Chose the correct date format to ensure the date formats are read correctly by the meet entry software.

4. Meet Date Information - Select your start date, end date, and age-up date for the meet. Ensure these are correct as they will enforce the event age during event entry. If they are incorrect, all teams will not be able to enter the events with correctly aged athletes. Double check this entry.

5. Entry Limits - Your entry limits will be enforced during event entry. You have the option of enforcing both individual event, relays or both. Include your total entries.

6. Surcharges- Meet surcharges are dollars paid to the hosting team to host the meet. Enter in the necessary charges and leave fields blank that do not apply.

7. Additional Enforcement- Checking these options will enforce this on the SwimOffice side during syncing.
   - **Enforce Qualifying Times** - Once you create qualifying times for each event located in Event Entries > Event Time Standards, your athletes will only be able to swim the event if they meet these qualifying times. SwimOffic will allow admins to override the standard but families will not have this functionality.
   - **Allow Relay Course Conversions** - If your meet allows converted times for relays select this option.
   - **Minimum Qualifying Time for Non Conforming Times** - Meet entry times that do not correspond to the course type for the meet. For example; yard entry times for a long course meters.

Meet Setup

8. **Entry Data Type** - Enter Athletes by Time or by Heat/Lane. Entering times is for meets that will seed the swimmers by time to determine the heats and lanes. Entering heat and lane is for meets (like dual meets) where you want an athlete assigned to a particular heat and lane regardless of their time, for each event entered. ONCE THIS CHOICE HAS BEEN MADE AND ATHLETES ENTERED, DO NOT CHANGE IT OR DATA WILL BE LOST.

9. **Meet Type** - Choose Age Group Meet, High School/College or Masters Meet. Meet definitions are: Masters Meets are those meets for 19 and over swimmers that are broken down by 5 year age groups. The standard age groups are 19-24, 25-29, 30-34,35-39 etc. Swimmers typically all swim in the same event (men and women of all ages) and then the results are broken out by age and gender showing the places that each athlete attained in each age group and gender.

   Age Group Meet- Age Group meets apply to any swimmer under the age of 19, no matter what their skill level. Most age group meets are grouped by gender, age and ability. Some meets are referred to as mini meets and allow only swimmers who are 10 and under. Most meets use the age groups of 10 and under, 11-12, 13-14, and Open. Open at an age group meet, usually applies to any swimmer over the age of 15. Most often, meets have qualifying times that a swimmer must have attained in order to swim in that particular meet. Some meets, particularly at the beginning of the swim season are called "no time" meets – meaning that anyone can swim in the meet and there are no qualifying times.

   High School Meet – High School swim meets can either be sanctioned (governed by USA rules and the times are considered legal times) or un-sanctioned meaning they are only valid in the school district. The are usually run much like a Age Group meet but the athletes and meets are not governed by USA swimming, have no identifying numbers and their times are not legal qualifying times outside of HS swimming.

10. **Number of Pool Lanes** - Enter in the number of pool lanes.

11. **Pool Length/Course Order** - This is critical to set the length which will enforce on the entries side. If this is a multi cut meet ensure you place your course order appropriately. Remember that a multi cut meet either YSL (Y- Short Course Yards, S-Short Course Meters, and L-Long Course Meters) YLS, SLY or LSY will enforce this order on the entries. For a YSL it means if the athlete has a Y time which qualifies it will be used, if not the system will look for an S time and if this can't be found it will look for an L time.

12. **Print Preview Size** - Allows you a bigger page view if you chose more than 87%.

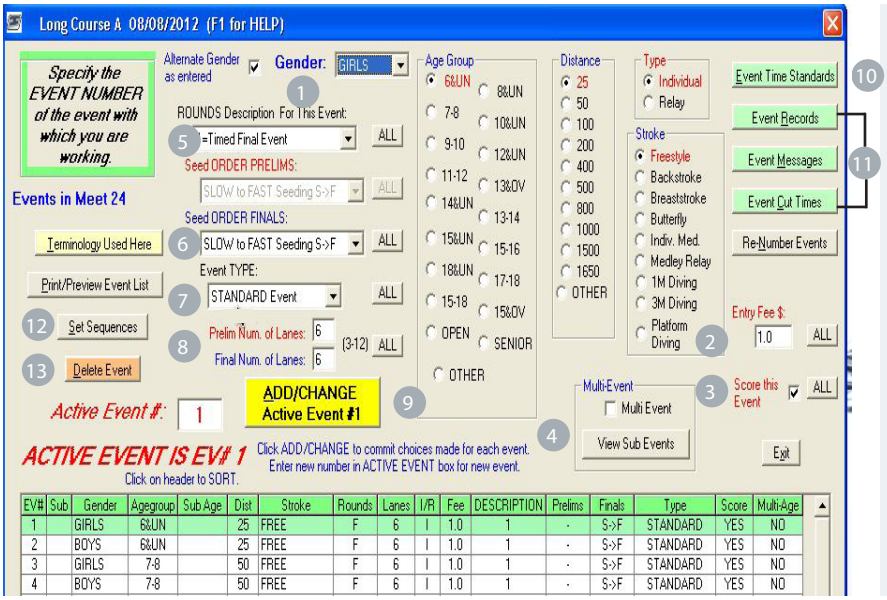
13. **Which DQ Code Set** - DQ codes are the disqualification codes that you will attach to an athlete that DQs during an event for instance, "didn't touch". You have the option of using the standard USA DQ codes or use the alternate DQ codes supplied.

14. **Type of User** - Select Novice when you first use TouchPad and it will provide many additional help pop up screens to give you direction through the process. Use the Expert option to stop the help pop ups.

15. **Default Printer** - Set your primary printer for all reports and your label printer for labels only. If you don't see your printer you will need to ensure it's setup in your computer's control panel.

16. **Scoring Preference** - Although it's not required to set your scoring up before syncing your entries file, you can implement your scoring amounts for event placement during meet setup. This can be updated at any time during the running of the meet to generate scores based on your needs of the specific meet. See page 13 for more detailed information.

Event Setup



Tips and Tricks

Try and setup your preferences, sequences and event fees in this screen. This will save you time later when you are entering athletes or seeding the meet.

1. **Create Events**- Make your selections to create your events. You must select Gender/Age Group/Distance/Type and Stroke. Simply select the Add/Change button to create the duplicate event but for the alternate gender.

2. **Entry Fee** - Type in the amount for the entry fee of this event. Leave this amount if all events have the same charge. Don't forget to update as event amounts change.

3. **Score this event** - Place a check mark in this box if it's a scored event.

4. **Multi Event** - Multi Events are events in which multiple age groups compete in the same event but results, awards, and scores are needed for each age group within the single event. Select this option to create multi events and to learn more about this feature. Use the 'Make these sub age groups the same as those used in Event #' to clone the multi event template you have already created for a previous event.

5. **Rounds** - Select the type of round this will be in the drop down. Only update as needed if your event rounds change. For instance if the events change from Timed Final Event to Prelim/Final.

6. **Seed Order Prelims/Finals** - If your event(s) are set to prelims/finals you need to select the seed order for the Prelims and also for Finals.

7. **Event Type** - Standard/Time Trial or Swim off event are your choices.

8. **Prelim Num of Lanes/Final Num. of Lanes** - populate accordingly.

9. **Add/Change** - You must make your selection first and use this button to implement your add or change of event(s)

Event Setup

11 **Time Standards/Event Records/Event Messages/Event Cut Times-** See page 11,12 for more detailed information.

12 **Set Sequence** - Use the set sequence, a required module, to implement a list of events in a particular order with certain properties. You can create as many sequences as necessary for each meet.

An example would be to create a sequence for your distance event and another for your other events. This works well for doing positive check ins for you OnDeck application as it will allow you to separate the check in based on sequence for ease of use. See more on OnDeck's manage check ins functionality on page 35.

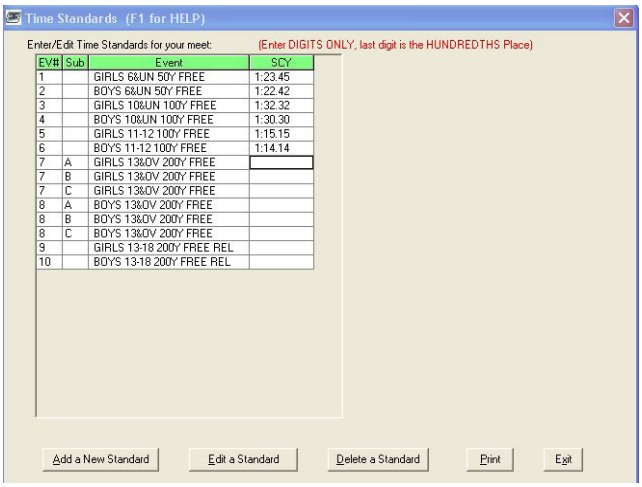
Sequences can be used to specify the printing order of events for your heat sheets and results and can be used for the result processing order and meet time line generation. For instance you would set a sequence up for a time line that would include 90 seconds in between each heat. This will then produce a time line for the meet showing when each event/heat will begin.

The sequence specifications will over-ride any other choices that you might make. For instance in the Heat Sheets you can chose different options but the sequence will over-ride any competing information.

13 **Delete Event** - Select your event and chose 'Delete Event' to remove it from the event setup.

NOTE - once you have completed your event setup, you will be ready to sync to your TeamUnify SwimOffice site. Please see page 31 for more information on TUSync.

10



Tips and Tricks

Time standards will enforce all athletes on the SwimOffice side so ensure you have implemented these accurately.

Don't forget, in TouchPad, you do not need to add in your designators. Simply select Enter or Tab to apply these automatically. Don't forget to enforce your standards in File > Edit Meet

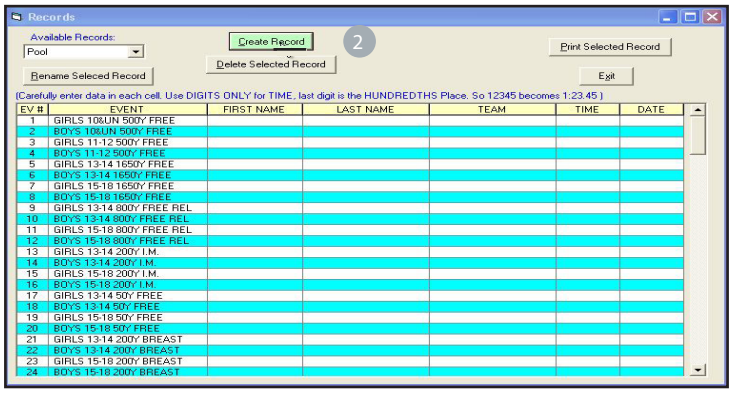
10 **Event Time Standards** - Select this option to implement time standards. Once you make this choice, select Add a New Standard/Edit a Standard/Delete a Standard. Standards are used to ensure athletes meet a certain time before they are qualified to swim an event. This time can be faster than, slower than or equal to a specific time designator.

Event Information

Tips and Tricks

Messages are a great way to fun-draise. Sell message space to sponsors and the message will appear in the Heat Sheet that is part of your meet package.

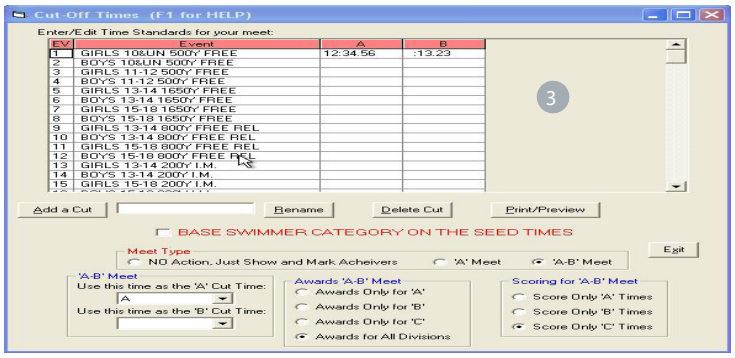
1 **Event Messages** - You can add up to three messages per event. These messages will appear on your Heat sheets and Results.



Tips and Tricks

Records are an important aspect of motivation. Create your records so athletes have something to strive towards. Remember, backup your meet to preserve this information and restore for your next meet.

2 **Select Create a Record** - Enter your record name in the field and select Create Record. Once your record is created add in the correct information for each cell name. When a record is broken for this meet it will be denoted next to the athlete in times entry.

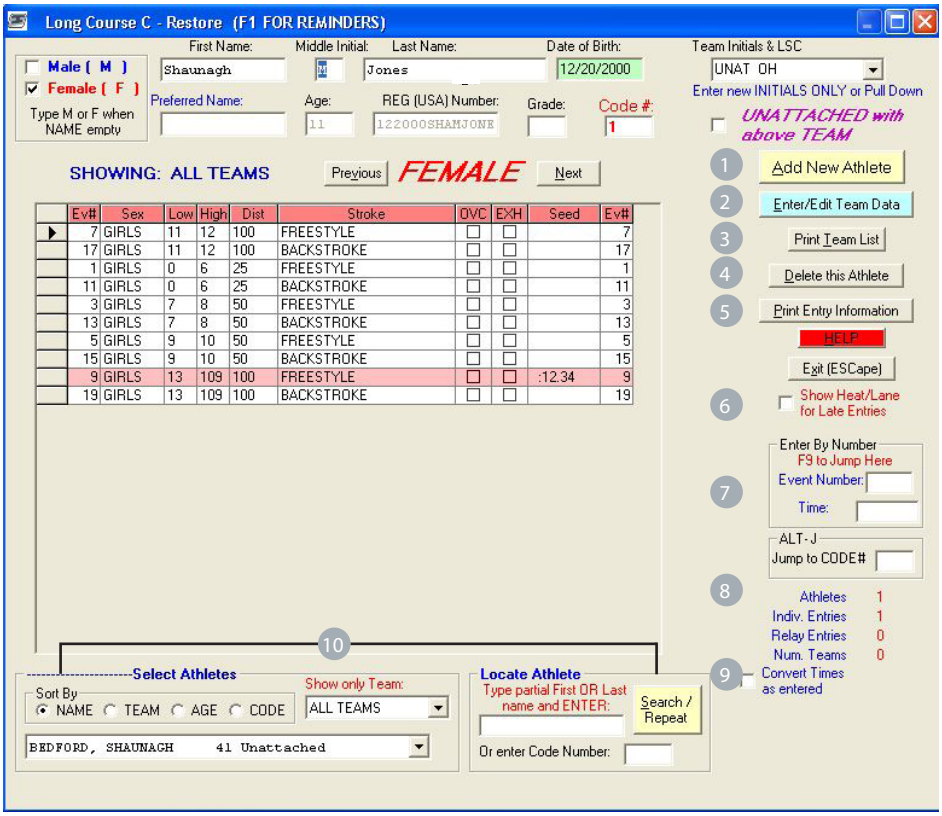


Tips and Tricks

Meets with cutoff times help athletes reach important goals during the season. Remember you don't have to take action on these times but awards can be an important result.

3 **Create Cutoff Times** - These cuts are used for action during the meet and not as entry standards. You do not have to take action on cut times. For example choosing an A meet specifies a cut time as an A cut and those faster than the time will be an A swimmer and those slower will be B. It's up to your team to handle scoring and awards for such a meet.

Create/Edit Entries



Tips and Tricks

Do you need to find a specific athlete fast? Use the 'Locate Athlete' filter and fuzzy search logic on either the first or last name to quickly bring up your athlete.

Don't forget TouchPad gives every athlete a code that you can place into the Code Number field to also search quickly.

Athlete Entry - If you have entry files (not TUSync) go to File < Preview/Import < Import CL2, SD3, HY3 Meet Entries/Results/ENTRIES PROGRAM DATA. Below you will find manual athlete entry instructions.

1 **Add New Athlete** - Select this button to clear all fields out in the athlete information area. Enter in all information beginning with Gender, First Name, Middle Name, Last Name, Team Initials (pull from drop-down), Age, Reg number, and Birthdate. Once you have entered in this information, all corresponding gender specific events that they are able to swim will show. Fill in the necessary information including whether this is an exhibition swim and if they have entry seed times.

2 **Enter/Edit Team Data** - Select this button to enter or edit team information.

3 **Print Team List** - Select this to print a list of all competing teams.

4 **Delete This Athlete** - This will delete the athlete that is currently viewable.

5 **Print Entry Information** - Use this selection to open up the Meet Reports screen. This will give you all administrative reports, fees report and exception reports.

6 **Show Heat/Lane for late entries** - When checked on, this option will show all assigned heat and lanes for each entry. Use this option when making late entries only. Events are re-seeded, all heats and lanes will be re-assigned. Be careful to not make any changes to current Heat/Lane assignments.

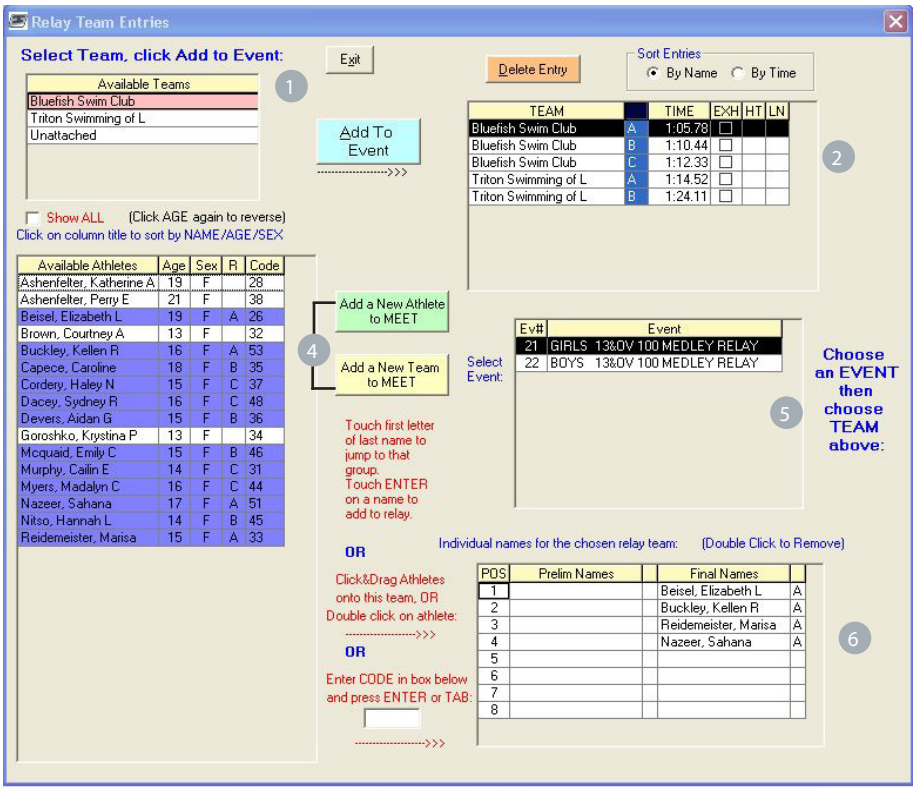
7 **Enter by Number** - Type in your event number and F9 or enter to highlight that event on the left panel.

8 **Jump to Code (AltJ)** - Type in the athlete code that TouchPad assigns to each athlete. Select AltJ to

Relay Entries

9 **Convert Times as Entered** - You may convert times as you enter them. You will specify the multiplier by which you multiply each time. For instance you might use 1.1 to convert yard times to meter times or you might use .9 to convert meters to yards. Once you enter in your pre-converted time and select either Tab or Enter, the time will convert.

10 **Filter Options** - Use the radio button selection to help you search for specific athletes.



Tips and Tricks

TouchPad makes it so easy to administer relays. Dragging and dropping your athletes or double clicking them pushes them directly into the event.

Did you know that OnDeck has the same functionality. Check out the Meet Entry > Meet > Relays to quickly add your athletes into their event.

1 **Select Team/Available Teams** - Current teams in the meet. You can select a team and add to an event using the "Add to Event" Button.

2 **Add To Event** - Select a team and click 'Add to Event' to place into an event on the right. Once you place a team in an event, all qualifying athletes will show below for selection.

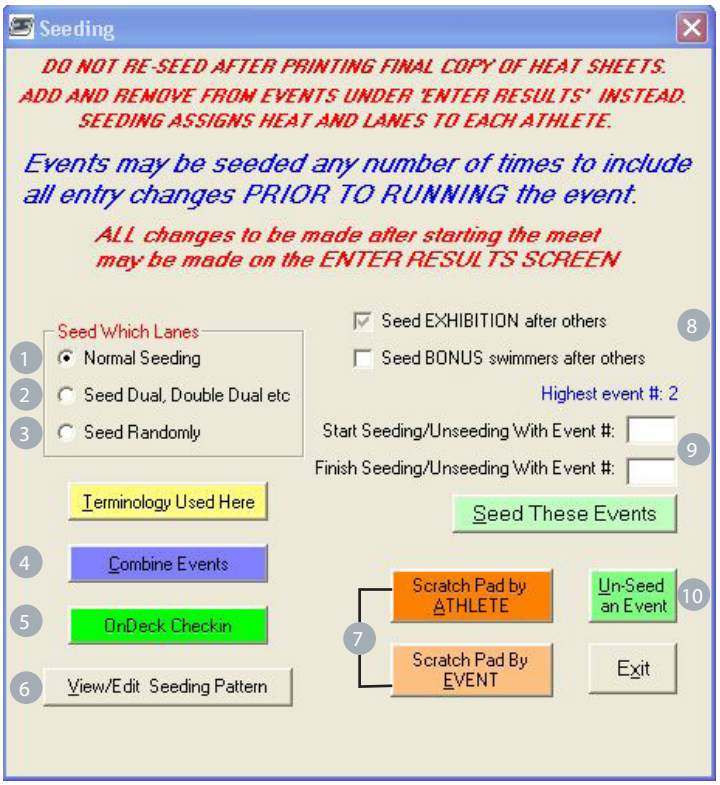
3 **Available Athletes** - All qualifying athletes will show. All athletes in purple are already in this event. Only athletes not highlighted can be added. You can select the column header to sort and select again to reverse the sort order.

4 **Add a New Athlete/Add a New Team to MEET** - Select either option to deck enter an athlete and add to a relay or to add a new team into this meet.

5 **Choose an EVENT then choose TEAM above** - Once you select an event and then select a team you will be given all entered athletes and all qualifying athletes. This will give you the option to edit the athletes in the relay.

6 **Athlete Edit/Add/Delete** - Drag and drop athletes from the left into the event to add to the relay. Double click an athlete to remove them. You can also enter in their code found in the code column in the qualifying athlete area and press enter or tab to add.

Seeding



DO NOT re-seed after printing final copies of the heat sheets. Use Enter Results screen instead.

Tips and Tricks

The scratch pad is an easy way to scratch and reseed athletes before the meet begins. Remember once the meet starts, you have to scratch athletes from the results entry screen.

If you want to scratch all events associated with an athlete use the 'Scratch Pad by ATHLETE' feature.

Don't forget the OnDeck checkin feature will revolutionize how you run your meet and the app is free! Click HERE to learn more.

1. **Normal Seeding** - Choose Normal seeding to have the system seed based on the standard seeding parameters. Standard seeding parameters will place your fastest swimmers in the middle lanes and seed out to the last lanes on the outside for slower swimmers.

2. **Seed Dual, Double Dual etc.** - Select this option to open up a screen to allow you to place individual teams in specific lanes. You can double click the team to move them into their corresponding lane or drag and drop.

3. **Seed Randomly** - This option allows the system to seed athletes randomly. This is useful if athletes have no seed times for example.

4. **Combine Events** - Select to take you to the combine event screen (see page 21). This will allow you to combine two events and run them as one event but scoring and results will be separated back out.

5. **OnDeck Checkin** - Select to take you to the OnDeck checkin functionality (see page 286).

6. **View/Edit Seeding Pattern** - Select this to update how you would like to seed your athletes. It's currently defaulted to the standard pattern; for instance a 6 lane pool would seed 3,4,2,5,1,6.

7. **Scratch Pad by Athlete/Event** - This selection will allow you to view by that option.

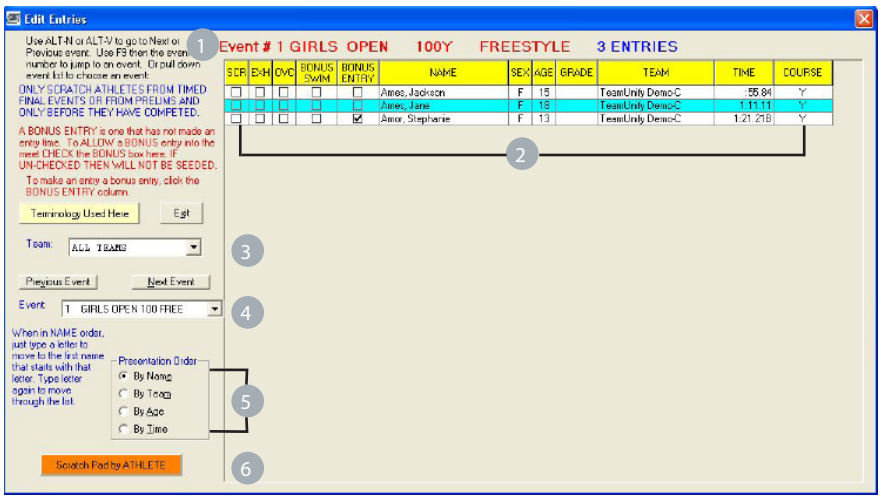
8. **Seed Exhibition after others/Seed Bonus swimmers after others**- Select these options if you are seeding the bonus and exhibition swimmers (selected in the scratch pad) of their respective events last.

9. **Seeding Now** - Enter in your start/end event # to seed. Do not reseed after printing the final heat sheets.

10. **Un-Seed an event** - This selection will un-seed an event to allow changes before final heat sheet printing.

Seeding

Scratch Pad - **Only** scratch athletes using Scratch Pad if it's before the event has started. Select this button, check mark the athlete to scratch and exit. Once you have done this you need to reseed the events in order for all heats to be correct. **IF** the meet has already started, you must use the Enter Results screen to scratch athletes. Use the SCR notation and do not reseed the meet.



Tips and Tricks

You can use the button, 'Terminology Used Here' to help with this feature.

Don't forget, even though an athlete is designated with a check mark in the 'Bonus Entry' box, you must select 'Bonus Swim' to confirm.

1. Event # information- Confirm you are working with the correct event information. Event #/Gender/Stroke/Distance and # of entries is noted on this line.

2. Event/Athlete Information- Place a check mark in the SCR/EXH/OVC or BONUS SWIMS check box next to the athlete you are applying it against. An athlete will have a check mark in the **Bonus Entry** box if designated in SwimOffice. You MUST select the Bonus Swim box to confirm. Remember if you are tagging this athlete as a bonus swimmer you have the option of seeding them last on the previous seeding screen.

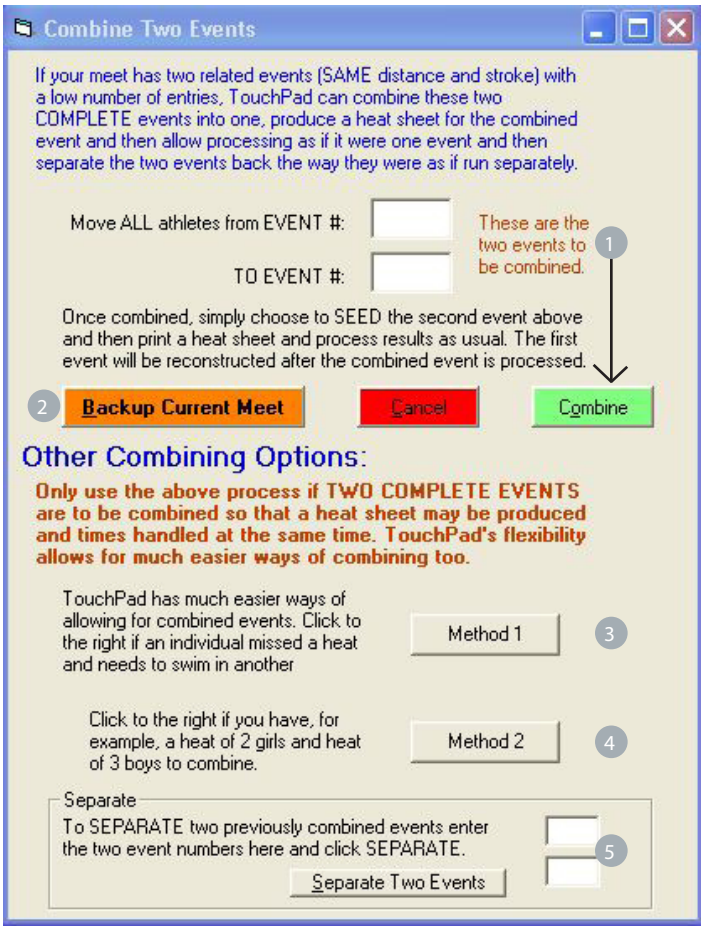
3. Team Selection- Use the dropdown to narrow your athlete search.

4. Event Selection- Use the dropdown to make your event selection or use the previous/next event button.

5. Presentation Order- Select the radio button that presents the information in a view that is most efficient.

6. Scratch Pad by ATHLETE- This selection will bring you back to the main seeding screen to allow you to select Scratch Pad by ATHLETE if you would like to scratch by athlete instead of event.

Combine Events



Tips and Tricks

Combining is so simple and easy to do on TouchPad and the only thing that has to be identical is the stroke and distance.

Put your two event numbers into the fields, select combine and presto! When you enter in your results and move to the next event, TouchPad automatically splits the combined event back into two allowing for normal results and scoring. You don't even have to lift a finger.

Do you love watching the tutorials as well? Here is the tutorial on combining events, Combine Events.

1. **Event #** - Enter in your two event numbers to and select 'Combine'. All athletes in the first event # field will be moved into the event # placed in the second field.

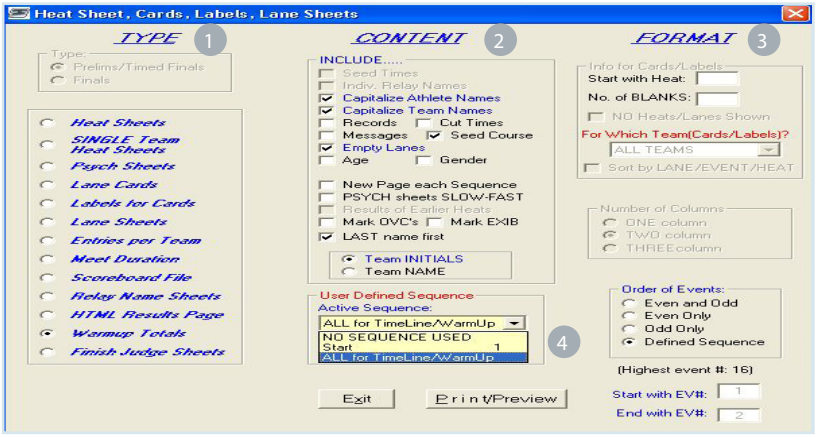
2. **Backup Current Meet** - TeamUnify suggests you backup your meet before you combine or seed as a good rule of thumb.

3. **Method 1** - If and athlete misses a heat use this method (instructional only). Have athlete swim in ANY other event and then in the Enter Results area put the athlete's time in their correct event and they will instantly score with all other swimmers.

4. **Method 2** - Used for electric timing when you need to combine events or heats. Assign the athletes into their respective lanes within the event/heat and time the race. Go to the event with the first set of athletes and place them into their assigned lanes (leaving other athletes out that are not in this event #) and import times (the system will ignore the other empty lanes). Now go to the other event and place your next set of athletes into their assigned lanes and import times again.

5. **Separate Two Events** - Place your previously combined event #s into fields and select separate.

Heat Sheets/Pre-Meet Reports



Tips and Tricks

Although this is titled Heat Sheet, you are able to print virtually any/all reports out of this module including Psych Sheets, Labels for Cards, HTML results page and Finish Judge Sheets.

Select a sequence to help define your report.

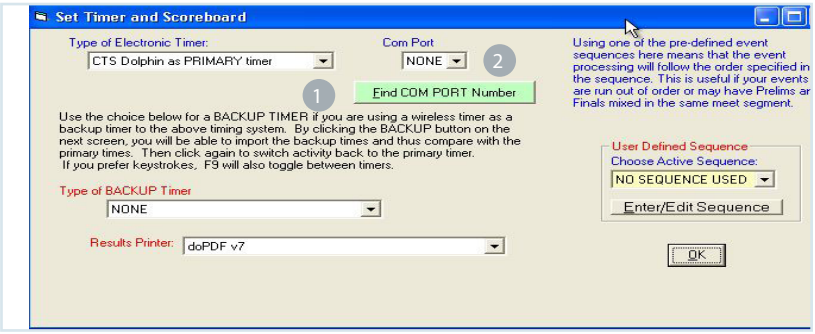
1. **Type**- Make your type selection, Content and Format that you wish to generate on your report. Once you have made your selection, move to the content and then format column.

2. **Content** - After you make your 'Type' selection, make your 'Content' selection which includes what content will or will not appear on your report you're generating.

3. **Format** - Format will allow you to decide how your report will look for example number of columns or order of events. You can also select which event #s to generate or which sequence.

4. **User Defined Sequence** - Select a sequence to filter your information. When using WARMUP TOTALS use the sequence dropdown to select 'All for Timeline/Warmup" to ensure all sequences are used.

Scoreboard Setup/Event Upload



Tips and Tricks

Always ensure your timing systems are working as expected well in advance of your meet.

1. **Set Timer and Scoreboard**- Select your Timer (none if manual timing), select your Com Port number, Back-up Timing system if using and your output printer. Once these selections have been made select OK.

2. **Electronic Timer**-TouchPad communicates with a large number of timers that permit you to import the times and splits with the click of a button.

   The Colorado Timer and the Daktronics 6000 and 2000 also sends the backup button times and the admin can correct any invalid times easily.

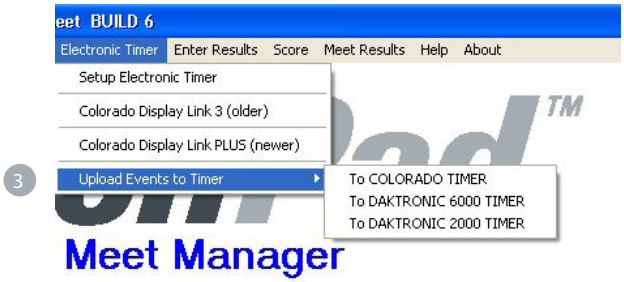
   These two timers also permit you to configure all the times for a failed heat "the timer did not start from the beginning of the race" from the watch times.

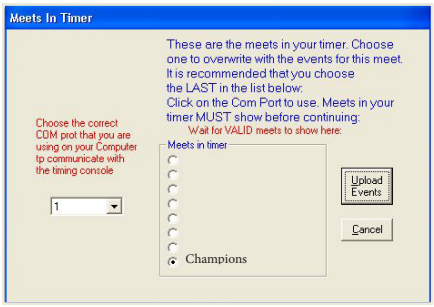
   TouchPad also communicates with the Colorado and Daktronic scoreboard. The athletes in each heat are delivered to the scoreboard software which then displays them on the scoreboard

   When scoreboard interfaces are used data is auto requested and sent by TouchPad without operator intervention.

   Finding My COM port - If you are using a USB to COM (serial port connector) you will need to know the COM port number that Windows has assigned to that comport. This number may be different each time you plug into the USB port or any time you restart your computer

   After plugging the USB cable into your USB connector you may right click onto MY Computer, chose the properties item on the menu, chose the hardware tab and then chose device manager. Open the ports item by clicking the plus button to ports and the USB to COM cable should show along with the COM port number that has been assigned. This number is the number you must chose in any dialog box that asks for the proper COM port number.





3. **Upload Events to Timer** - Select the Set Timer and Scoreboard option, Scroll down and select, "Upload Events to timer". This will push the event setup file to your timing system. You will receive an additional screen. If you are running multiple meets on the same date, ensure you use the Choose Meet Button to correctly select the current meet. Enter in your COM port Number and select TEST to ensure you have a connection. Select Upload Events to push the data. For Colorado and Daktronic Timers only.

Timing

1. **Event Information** - This will give you a quick view of the event #, description, and number of athletes swimming in the event.

2. **Round** - This will designate what type of round this is; Prelims/Timed Final or Finals. This is designated in the meet setup.

3. **Prev. Event/Event/Next Event** - Move in between events and view the current event in the dropdown.

4. **Set Timer** - Allows you to set the electronic timer if you haven't already done so.

5. **Entry Screen** - Manually enter in times or select the correct DQ code and R (record) will show an asterix if a record has been broken. If you accidentally begin to overwrite a good time, type 'x' and move into the correct field the correct time will hold.

6. **Insert1(In meet already)** - Select this button to insert a swimmer into the meet if they already exist in the meet database. You can drag and drop into the heat/lane or drag them into another swimmers' position to switch them.

7. **Insert2(not in the meet)** - Select the event/heat/lane first and then Select Insert2(not in meet) to manually add a swimmer.

8. **New Heat** - Select this button to add a blank heat

9. **Clear All Times** - This will clear all times from this event only.

10. **ReMove** - This will remove an athlete from the event. Select the athlete, select ReMove button.

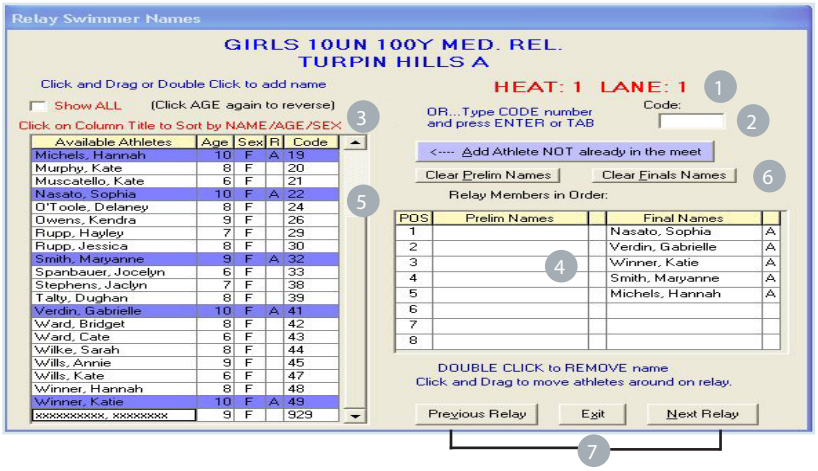
    ---**note** - you can right click on an athlete to update information.

11. **Relay Names** - Select this button to open up your relay editing functionality. See complete description on next page.

12. **Edit Splits** - This will bring up the splits screen to manually edit.

13. **Score** - Select Score to immediately score this meet using the options available.

Timing/Relay



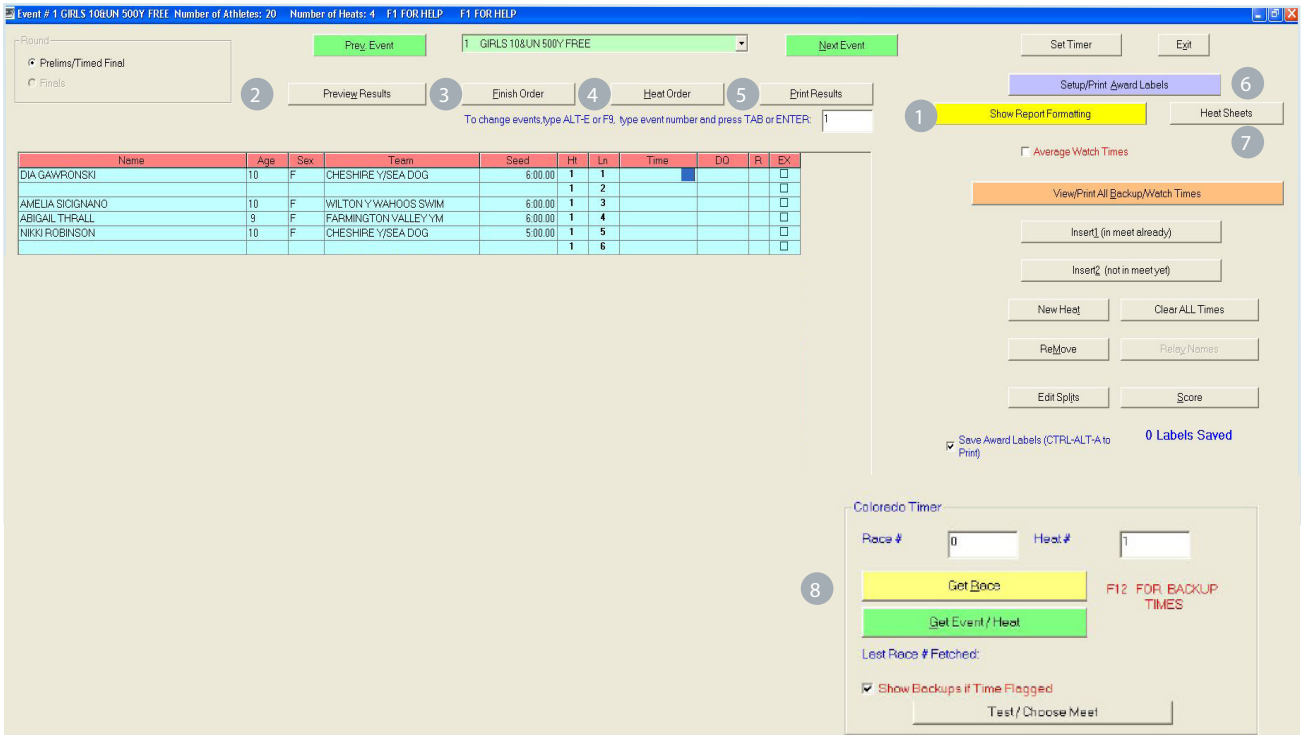
Tips and Tricks

TouchPad is focused on ease of use and relay entries are no exception. Use the drag and drop feature to easily move your athletes in and out of relays for this meet. All relay information can be found in this screen saving the

Relay Names- Relay names allows you to see the relays, add, replace and delete athletes during the event.

1. **H/L**: Lets you know what heat and lane the relay team below belongs to.
2. **Code** - Type in the TouchPad code of the athlete to place them into the relay. The code will show to the right of the athlete box for ease adding.
3. **Sort** - Click on a column header to sort your athletes
4. **Relay Athletes** - This shows you all of the athletes entered in the current relay. If there are prelims it will show on the left and finals on the right. Drag an drop and athlete into this area to add or drag them over another athlete to replace. Double click and athlete to remove them.
5. **Athlete List** - This area shows you the list of athletes available to swim this relay. You can drag and drop or double click to add them into the relay.
6. **Clear Prelim/Finals Names** - Select the appropriate button to clear all athletes from the current relay.
7. **Previous Relay/Next Relay** - Select this option to move between relays.

Timing



1. **Show/Hide Report Formatting** - Select Show Report Formatting and make your report selections. Select the corresponding button to create your results.

2. **Preview Results** - Once you have selected your formatting options select preview results to show you the results for the event/h/l showing.

3. **Finish Order** - This will show you, on screen, the finish order by time ignoring h/l. If there are multiple heats the system will order based on fastest to slowest.

4. **Heat Order** - This will show you the finish time for each heat.

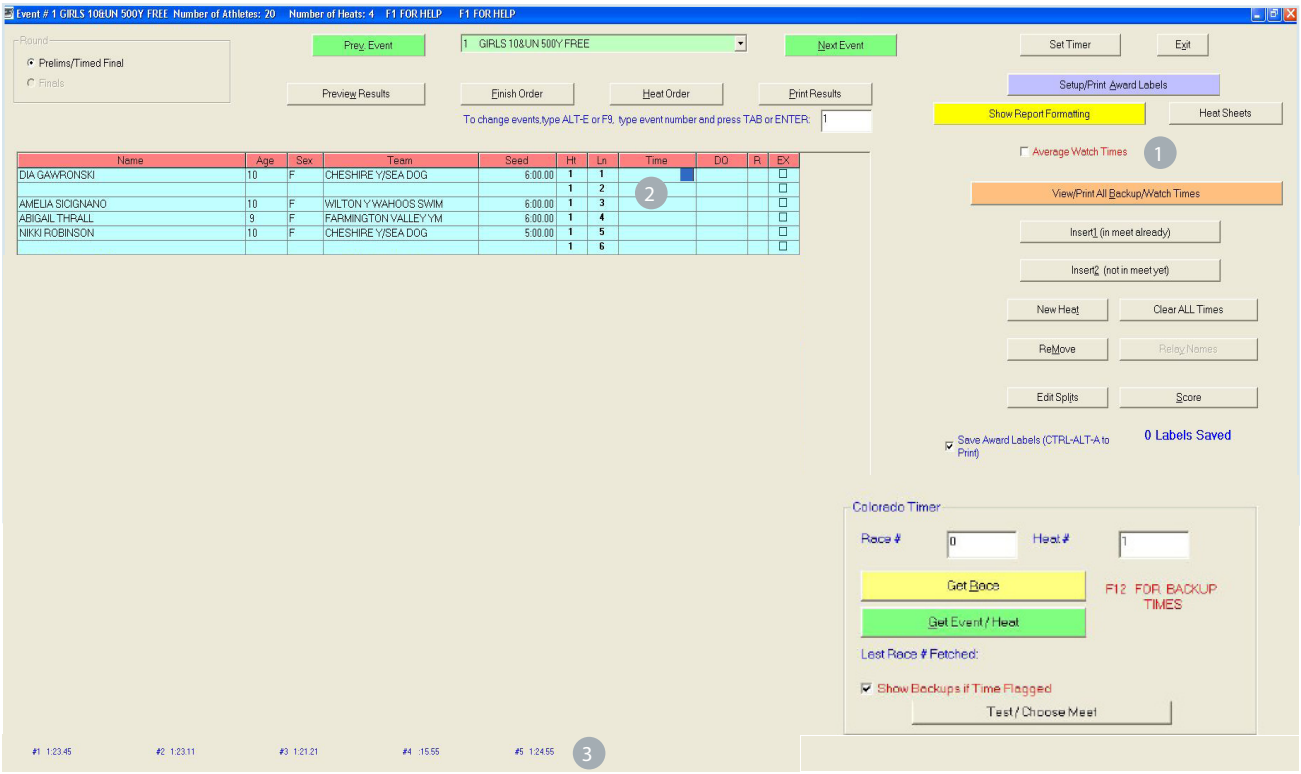
5. **Print Results** - Select your options in the formatting area and select print results to print the results for the current event that is being viewed.

6. **Setup/Print Award Labels** - Select this option to print your Award Labels. Setup options include start/finish event #, number of places to award and what sheet label (row) to start with. You can also select EXH, DQ, personal bests, prelims and other options for printing.

7. **Heat Sheets** - Select Heat Sheets to bring up your heat sheet, cards, labels, and lane sheets screen. See section on Heat Sheets to understand your options or in addition please see Appendix B.

8. **Timer/Get Race** - Depending on your timing equipment being used, this area will be denoting what your Race# and Heat# currently is. To pull in the times from your timing equipment select, 'Get Race'.

Time Adjustment



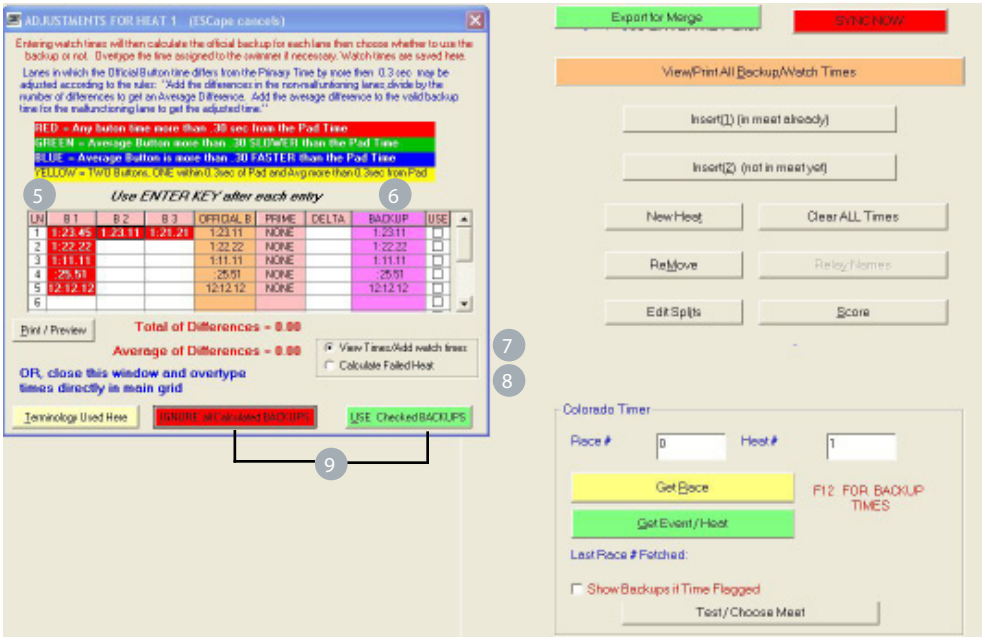
1 **Average Watch Times** - Select Average watch times and place up to five watch times in the times column. Type in the first time and select enter, place your second time and press enter again. Do this up to five times and the system will automatically calculate the average watch time after the final enter and list it in the times column.

2 **Times list** - Enter your times in this column selecting enter after each entry.

3 **Watch times** - As you enter your times into the above column, they will show in the bottom left of your screen.

Time Adjustments

Electronic Timer Adjustment (Colorado and Daktronics 2000)



Tips and Tricks

TIPS and Tricks (Be careful about the case where the backup time is SLOWER than the pad time since this could be due to a simple late push of the button(s) on that lane.

The adjustment grid may be printed so that officials can look at the raw data that came in from the timer in order to make a final decision.

4 **Time Adjustment** - Adjusting An Electronic Time **USE F12** to open up this function.

5 **Grid** - LN will be your lane #, B1, B2, B3 will be your button times, Official B is the average of your button times, Prime is touchpad time, Delta is your adjustment according to the rules of prime and official times having more than.3sec difference and your Backup is your watch times. Place a check mark to the right of any backup times to use those as your official tie.

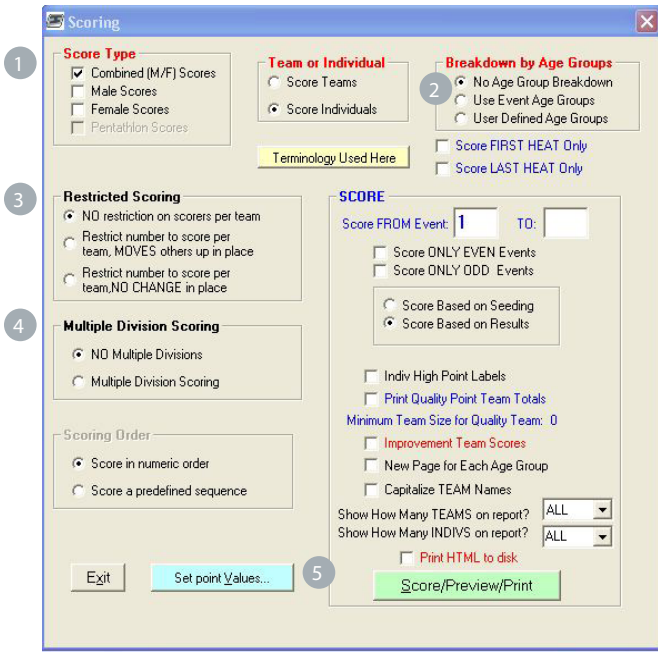
6 **Backup** - Entering watch times will from the times entry screen will calculate the official backup for each lane. Choose whether to use the backup or not. Overtype the time assigned to the swimmer if necessary.

7 **View Times/Add watch times** - This selection will show button times/pad times and watch times to calculate official results.

8 **Calculate Failed Heat** - This selection is used when one of the automatic timing did not start and was manually started late. In this case the pad times will show the correct order but the absolute times are not correct. Enter in the watch times and TouchPad will calculate the Official Watch Time.

9 **Ignore all calculated backups/Use checked backups** - If you select 'Ignore' TouchPad will place the official time based on Prime and 'Use Checked' will place any selected backup times into the times entry field.

Scoring



Tips and Tricks

Make your selections and press the Score/Preview/Print button to generate your results. You can update the parameters at any time and generate new information.

The Score/Preview/Print button can also be located within the timing event module.

1 **Score Type** - Make your selection to decide how to combine your scoring. You can either combine M/F, Male or Female only, or do it by Pentathlon score. Pentathlon meets are meets in which it is assumed that all athletes will compete in all events and their TIMES will be added rather than their points to determine the winner in each group. Athletes who do not compete in all the events offered are NOT included in the scoring.

Pentathlon meets work well as an early season meet with all swimmers swimming each stroke plus an IM to get a base time in each event. Pentathlon meets may in fact have any number of events and team scoring is done in the usual way using points (including relays). The times are added for each individual and relays are not considered for time addition.

Scoring

2. Breakdown by Age Groups – You can score based on Age Groups, Event Age or User Defined Ages. When you select User Defined Ages you will be given a pop out box to specify what these age groups will be.

3. Restricted Scoring - Select No restriction on scores per team which means that scoring will happen as per normal. First place, regardless of what team will receive first place, second will receive second and so on. If you select **Restrict Number to score per team**, **Moves others up in place** will results in allowing the host to define how many places a team may receive and if they receive more, the next team will move up into that place. For instance, if the host selects 3 for IE events and a team gets 1st-4th place then the 4th place finisher will move out of scoring and the 5th place finisher (if on another team) will move into 4th place. If the host selects **Restrict Number to score per team, NO CHANGE in place** then if the above scenario happens, there is no move up by the other team they will remain in 5th place and no one will receive points for 4th place.

4. Multiple Division Scoring - Use this function for dual meets for instance or if you to want have three teams score as follows 1vs2, 2vs3, and 1vs3. You can not specify this scoring pattern until you have loaded the event entry files from all teams in the meet. See multiple division scoring on page 15 for more detailed instructions.

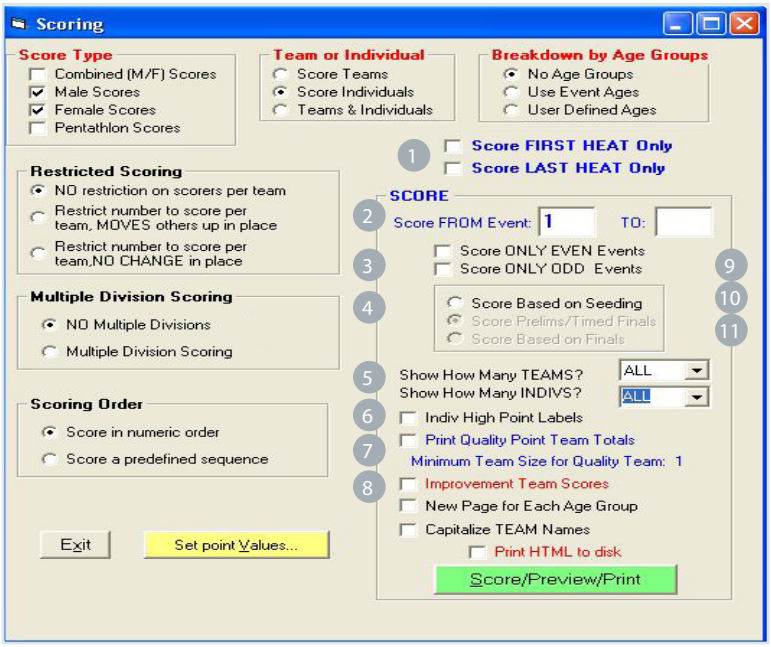
4. Scoring Order- If this is set to No Sequence Used, the system will score event 1, 2, 3 etc. in numerical order. If you set a sequence see next page for setup instructions.

5. Set Point Values - Select this option to set how many points will be awarded for each place in both Individual events and Relays.

Scoring

5 **Scoring Order** - Score in numeric order tells the event to be scored from event 1-X. If you select to score in a predefined sequence this will open up a window to define the sequence. A sequence is a list of your events in a particular order and with certain properties. These can be used to specify the printing order of events for your heat sheets and results and can be used for the results processing order and meet time line generation. You can modify the FMT (format to of heat sheets) the BREAK (breaks taken in the meet after this event has been completed) and the ORDER (the order of the events in a sequence) The sequence specifications will override choices made elsewhere; for instance Heat Sheets.

6 **Set Point Value** - This allows you to add value to the scoring ie: 10 points for 1st place, 5 for 2nd etc. Set these before you enter results. Scoring is dynamic and will score while the meet is occurring. If you set your points after the meet, you need to go to enter results and scroll through all events to apply scoring.



Tips and Tricks

Restricted scoring is a great way to ensure larger teams competing against smaller teams don't take away all of the awards. You can implement several ways to ensure the meet is scored fair from limiting places to having move up functionality.

Scoring dialogue can be found in almost all screens and is not critical to the entry files.

1 **Score First/Last Heat Only** - In some instances you will score only the first heat of swimmers and other times it may be the last heat. If you are running meets (typically duals) where there is one official heat that scores points and all other heats are not to count for points, then you may choose HEAT 1 SCORING or LAST HEAT SCORING. Only the athletes in HEAT 1 or in the LAST heat will score points towards the team totals.

2 **Score FROM event** – Type in the event numbers you would like to score.

3 **Score ONLY EVEN/ODD Events** - Occasionally you may use even events to have specific swimmers and odd will have other swimmers. For instance you may have slow swimmers or new swimmers in all odd events that you don't wish to score.

4 **Score based on Seeding/Results** - You may score your meet based on the seed times that have been entered. Multiple division scoring is NOT supported in the mode, nor are individual scores. This choice will produce overall team scores based on the order of the seed times.

Scoring - Multiple Divisions

1. **Setup Scoring Division** - Select this option to run meets that have scoring divisions within the meet for instance Division #1 might be team A vs B, Division #2 might be A vs C and Division #3 is B vs C.

2. **Teams in the Meet** – Once you load your teams into this meet they will populate this area for selection into your divisions. You CANNOT set up scoring divisions without first loading your teams entry files or adding your teams into the meet manually (done in the Edit Entries module).

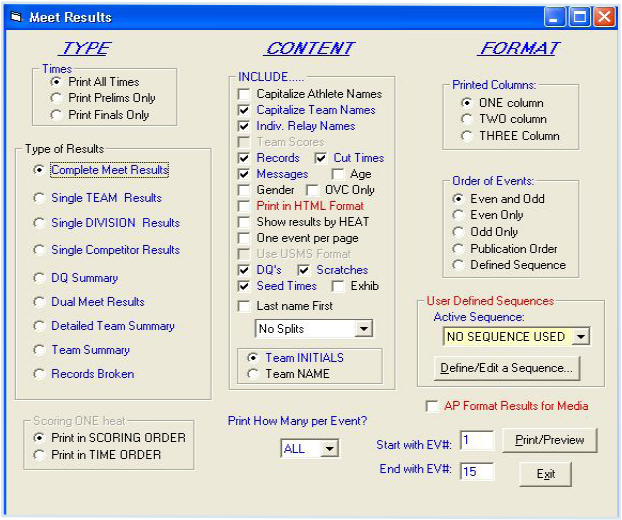
3. **Division** - Select the 'Active Division' radio button to begin adding your teams to each division. Once you have the radio button selected you can double click your teams on the left to add them in. Use your drop down arrow to view those teams selected.

4. **Name of Division** - Enter in the name for this division. This name will appear on reports.

5. **Clear** - In order to clear a division be sure to select the 'Active Division' radio button to the right of the division you need to clear and select Clear.

Meet Results

1. When using the Colorado Timer or the Daktronics 2000 timer you have the capability of adjusting times in which there is more than 0.3 seconds between the primary (pad) time and the backup (buttons) time.
2. USA rules call for calculating the official button time (if there is more than one), finding the difference between the official button time and the primary time for each lane in which there was less than 0.3 second of difference and then calculating the average of these differences. This average is then applied to the offending lane(s) in order to come up with their official time.
3. When times are imported and at least one lane has 0.3 seconds difference or more, that lane is high lighted in a different color.
4. A check box on the left allows you to specify which lanes to include in the calculation.
5. A check box on the right allows you to choose which adjusted times to use.
   *Be careful about the case where the backup time is SLOWER than the pad time since this could be due to a simple late push of the button(s) on that lane.



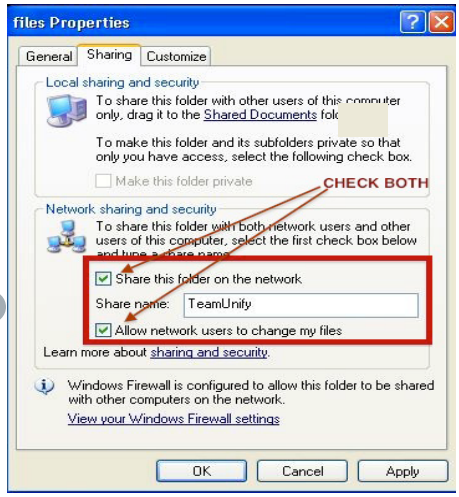
Tips and Tricks

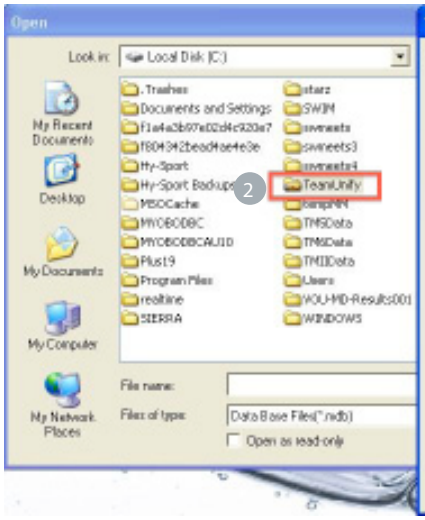
Don't forget to use TUSync to seamlessly sync your results back to your TeamUnify teams. Once synced, go to your SwimOffice website and release the official results. If you need to update the results at any time, adjust in TouchPad and sync again. This will adjust all teams that competed in the meet.

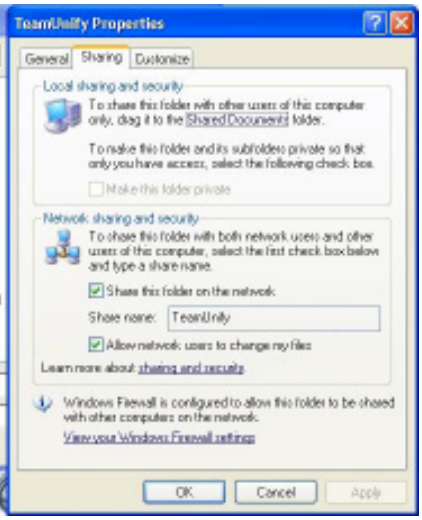
1 **Meet Results** - Once you have completed the meet, select meet results from the ribbon. This option has many selections for printing the results necessary upon meet completion. Each column provides options for the overall printout. Select first from column TYPE then column CONTENT and last column FORMAT. Once you have your selection chose the correct range of event numbers and then select Print/Preview.

To export your results please go to File > Export SD3 Meet Results/Entries/SWIMS. Send this results file to all Non TeamUnify teams or if you are not using TUSync to push your results.

Networking







1 **Network Management** - Network management allows other computer users to connect to the main meet located on the primary computer. Each user will select the level of access that they will need in order to complete their meet functions.

2 **TeamUnify/TouchPad Folder** - In order for your others computer operators to access your meet, you must allow sharing of your file called TeamUnify located under your C: Drive. In order to do this, right click on your folder and find the Sharing and Security Option.

3 **Sharing and Security** - Select the Sharing Tab and the module called, "Network Sharing and Security". This will vary by operating system. Ensure you select both the share files and allow network users to change this file. Select Ok to save changes.

4

Tips and Tricks

It's critical that you are not on the same event with another operator at the same time as one will overwrite the other. Remember to write your changes to the meet you must move to the next selection you are working on. This pushes the update to the other operators.

4 **Meet # for Networking** - When your other computer operators are networking they will be required to pick a folder that is numbered. The main computer with the hosted meet will give them the number of the meet located on the top blue bar to the left of the meet name as shown above.

Appendix A - Meet Reports

```
3/19/2012                                                                                Page 1 of 51
                                          age group
                                Headline 2 Used at the head of most reports
Starting Date:2012/01/01                                   MAX INDIVS- 2  MAX RELAYS- 2  MAX TOTAL- 4
FOREST HILLS
ARBINO, JOEY                M     12        FOREST HILLS                3          2          5
        36 11-12 50 BACK
        46 11-12 50 FREE
        56 11-12 50 BREAST
        RELAY EVENT NUMBER(S) 6   74
BANKS, KATELYN              F     17        FOREST HILLS                3          0          3
        29 15-18 50 FLY
        49 15-18 100 FREE
        69 15-18 100 I.M.
```

Event Limit Verification Report - This will match all entered athletes against the Max number allowed and will report on those that exceed this number.

```
3/19/2012                                                                                Page 1 of 19
                                          age group
                                Headline 2 Used at the head of most reports
Starting Date:2012/01/01                                   Incorrect USA Registration Numbers
FOREST HILLS                                                          CORRECT USA #     ENTERED USA #
Abineri, David              M     8         FOREST HILLS                03/06/97DAV*ABIN
ARBINO, JOEY                M     12        FOREST HILLS                04/25/96JOE*ARBI
BANKS, KATELYN              F     17        FOREST HILLS                01/28/91KAT*BANK
BANKS, SHELBY               F     14        FOREST HILLS                09/29/93SHE*BANK
BERNASCO, ABBY              F     10        FOREST HILLS                09/07/97ABB*BERN
```

USA Registration Number Verification Report- This will check through all athletes and report those that do not have a correct USA #.

```
3/19/2012                                                                                Page 1 of 1
                                          age group
                                Headline 2 Used at the head of most reports
Starting Date:1/1/2012  12:                                Check entered age against Date of Birth
FOREST HILLS                                                                  CORRECT AGE   ENTERED AGE
Abineri, David              M     FOREST HILLS          03/06/1997            11            8
TURPIN HILLS                                                                  CORRECT AGE   ENTERED AGE
Atkins, Payton              F     TURPIN HILLS          02/28/1997            11            9
Kautz, Annie                F     TURPIN HILLS          06/06/1998            9             8
```

Athlete Ages - Checks for Age Exceptions. Checks against the age entered and uses the age up if denoted in the setup. Any that do NOT agree will be reported.

```
3/19/2012                                                                                Page 1 of 1
                                          age group
                                Headline 2 Used at the head of most reports
Starting Date:1/1/2012  12:                                Check Ages of RELAY ATHLETES
INDIAN HILL
EV# 9  15-18 200 MED.REL.   F     INDIAN HILL 'A'
  1] Smith,Delaney F11      2] Klee,Victoria F12      3] Fritz,Natalie F18      4] Meier,Audrey F14
EV# 77  15-18 200 FREE REL  F     INDIAN HILL 'A'
  1] Fry,Samantha F12       2] Smith,Delaney F11      3] Meier,Audrey F14       4] Fritz,Natalie F18
```

Relay Verification Report - Checks for age exceptions of relay athletes.

```
3/19/2012                                                                                Page 1 of 1
                                          age group
                                Headline 2 Used at the head of most reports
Starting Date:1/1/2012  12:                                Check EVENT age/gender vs ATHLETE age/gender
TURPIN HILLS
Atkins, Payton              TURPIN HILLS          F     9
        25 GIRLS 11-12 50 FLY
        55 GIRLS 11-12 50 BREAST
        65 GIRLS 11-12 100 I.M.
```

Event-Athlete Gender/Age - Check for any mismatches between the age and gender of the event.

Appendix A - Meet Reports

3/19/2012 Page 1 of 39

age group

Headline 2 Used at the head of most reports

Starting Date:1/1/2012 12: Meet Entries

FOREST HILLS

Abineri, David FOREST HILLS M 8 03/06/1997
22 BOYS 8&UN 25 FLY NT H1L4

ARBINO, JOEY FOREST HILLS M 12 04/25/1996
6 BOYS 11-12 200 MED.REL A[2] 2:40.05 H1L4
46 BOYS 11-12 50 FREE :42.06 H5L6
74 BOYS 11-12 200 FREE RE A[2] 2:17.65 H1L3
36 BOYS 11-12 50 BACK :58.13 H4L6
56 BOYS 11-12 50 BREAST :44.86 H2L4

Meet Entries Report- This report will show all entries based on your selections. This report will include all athletes, seed times, relay entries and the relay position.

3/19/2012 Page 1 of 11

age group

Headline 2 Used at the head of most reports

Starting Date: 1/1/2012 12: Sequence: SAT AM CHECK-IN / CIRCLE EVENT NUMBERS

EV# 11 GIRLS 8&UN 25 FREE PRELIMS [88 Entrants] EV# 21 GIRLS 8&UN 25 FLY FINALS [12 Entrants]

GIRLS 8&UN		EVENTS>>>	11	21		
1 ALBERT, ERIN	7	NOR	11			
2 ALSPAUGH, WESLEY	7	IH		21		
3 BAILEY, CLAIRE	7	THSC	11			

Athlete Check-in Sheet - You must select your sequence before you can generate this report. This produces a positive check in sheet for each athlete and each event they are entered in. Use the TouchPad to OnDeck Manage Check-in functionality for teams using the OnDeck application. See more on page 37.

3/19/2012 Page 1 of 1

age group

Headline 2 Used at the head of most reports

Starting Date:1/1/2012 12: Check entered age against Date of Birth

FOREST HILLS

				CORRECT AGE	ENTERED AGE
Abineri, David	M	FOREST HILLS	03/06/1997	11	8

TURPIN HILLS

				CORRECT AGE	ENTERED AGE
Atkins, Payton	F	TURPIN HILLS	02/28/1997	11	9
Kautz, Annie	F	TURPIN HILLS	06/06/1998	9	8

Athlete Age Verification Report- Checks for Age Exceptions. Checks against the age entered and uses the age up if denoted in the setup. Any that do NOT agree will be reported.

3/19/2012 Page 1 of 1

age group

Headline 2 Used at the head of most reports

Starting Date:1/1/2012 12: Check Ages of RELAY ATHLETES

INDIAN HILL

EV# 9 15-18 200 MED.REL F INDIAN HILL 'A'
1] Smith,Delaney F11 2] Klee,Victoria F12 3] Fritz,Natalie F18 4] Meier,Audrey F14
EV# 77 15-18 200 FREE REL F INDIAN HILL 'A'
1] Fry,Samantha F12 2] Smith,Delaney F11 3] Meier,Audrey F14 4] Fritz,Natalie F18

Relay Verification Report - Checks for age exceptions of relay athletes.

3/19/2012 Page 1 of 1

age group

Headline 2 Used at the head of most reports

Starting Date:1/1/2012 12: Check EVENT age/gender vs ATHLETE age/gender

TURPIN HILLS

Atkins, Payton TURPIN HILLS F 9
25 GIRLS 11-12 50 FLY
55 GIRLS 11-12 50 BREAST
65 GIRLS 11-12 100 I.M.

Event-Athlete Gender/Age - Check for any mismatches between the age and gender of the event and the athletes.

Appendix B - Heat Sheets, Cards, Labels, Lane Sheets

3/19/2012 Page 1 of 18

age group
Headline 2 Used at the head of most reports

SC Yards
2012/01/01 - 2012/01/01

Event # 3 GIRLS 10&UN 100Y MED. REL.

Heat 1 of 1

1 TURPIN HILLS A	TURPIN HILLS	1:28.18	_____
2 INDIAN HILL A	INDIAN HILL	1:20.89	_____
3 TERRACE PARK A	TERRACE PARK	1:18.09	_____
4 FOREST HILLS A	FOREST HILLS	1:18.38	_____
5 NORMANDY A	NORMANDY	1:27.79	_____
6 MIAMI HILLS A	MIAMI HILLS	1:30.16	_____

Event # 8 BOYS 13-14 200Y MED. REL.

Heat 1 of 1

1 TERRACE PARK A	TERRACE PARK	2:28.74	_____
2 INDIAN HILL A	INDIAN HILL	2:26.93	_____
3 FOREST HILLS A	FOREST HILLS	2:09.66	_____
4 MIAMI HILLS A	MIAMI HILLS	2:25.87	_____
5 TURPIN HILLS A	TURPIN HILLS	2:27.99	_____
6 NORMANDY A	NORMANDY	NT	_____

Heat Sheet- This report will show all entries by event and Heat/Lane.

3/19/2012 Page 1

age group
Headline 2 Used at the head of most reports

2012/01/01 - 2012/01/01

TIMES ARE ONLY APPROXIMATE.
EVENTS MAY START EARLIER THAN SHOWN HERE!
Time between heats = 30 seconds Time between events = 60 seconds

EVENT	HEAT	NUMBER IN HEAT	START	FINISH
Ev 9 GIRLS 15-18 200Y MED.REL.	1	6	8:00	8:03
Ev 10 BOYS 15-18 200Y MED.REL.	1	6	8:04	8:07
Ev 11 GIRLS 8&UN 25Y FREE	1	4	8:08	8:09

Meet Duration - You **must** select your sequence before you can generate this report. This produces a report showing the Event, Heat, Number in Heat and Start & Finish time based on your sequence setup.

3/19/2012 Page 1 of 6

age group
Headline 2 Used at the head of most reports

1/1/2012 - 1/1/2012

RELAY SHEET FOR: FOREST HILLS

Event # 3 3 GIRLS 10&UN 100Y MED. REL.

TEAM A HEAT 1 LANE 4

	Name	Code	Stroke
1	ALLISON REARDON	860	
2	SAMME POLANCO	859	
3	KILEY PIPPENGER	857	
4	KELLY GRIMES	833	

Relay Name Sheet- Report showing all relays, Heat/Lane and athletes swimming.

3/19/2012 Page 1 of 1

age group
Headline 2 Used at the head of most reports

2012/01/01 - 2012/01/01

SAT AM

FOREST HILLS		NORMANDY		Unattached	
Girls 8 & Under	9	Girls 8 & Under	31	Girls 8 & Under	0
Girls 10 & Under	21	Girls 10 & Under	41	Girls 10 & Under	0
Girls 9 - 10	12	Girls 9 - 10	10	Girls 9 - 10	0
Girls 11 - 12	0	Girls 11 - 12	0	Girls 11 - 12	0
Girls 13 - 14	0	Girls 13 - 14	0	Girls 13 - 14	0
Girls 15 - 18	0	Girls 15 - 18	0	Girls 15 - 18	0

Warmup Totals - You must first select a sequence before generation. This report shows the total athletes by age group,team and sequence.

3/19/2012 Page 1 of 1

age group
Headline 2 Used at the head of most reports

SC Yards
2012/01/01 - 2012/01/01

Event # 9 GIRLS 15-18 200Y MED. REL.

FILL IN LANES IN ORDER OF FINISH

Heat 1 of 1

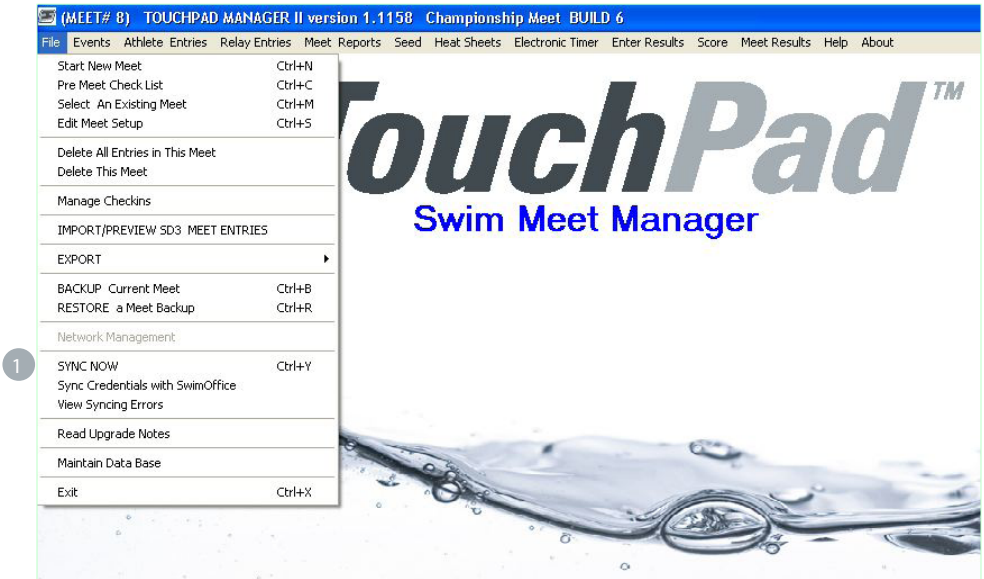
1 TERRACE PARK A	*PLACE 1* _____
2 NORMANDY A	*PLACE 2* _____
3 FOREST HILLS A	*PLACE 3* _____
4 MIAMI HILLS A	*PLACE 4* _____
5 TURPIN HILLS A	*PLACE 5* _____
6 INDIAN HILL A	*PLACE 6* _____

Finish Judge Sheets - Finishing sheet for placement of athletes. Used when you are manual timing or to overwrite a time entered into the system by the timing console.

What you'll learn in this Section:

- Syncing your meet
- Inviting Teams
- Understanding the invite interface/SYNC Dashboard
- Syncing meet entries back to TouchPad
- How to update results
- OnDeck Manage Check-ins
- Tutorial Step 2 Syncing Events & Entries
- Tutorial Accepting TouchPad Invitation
- Tutorial SwimOffice/TUSync Dashboard

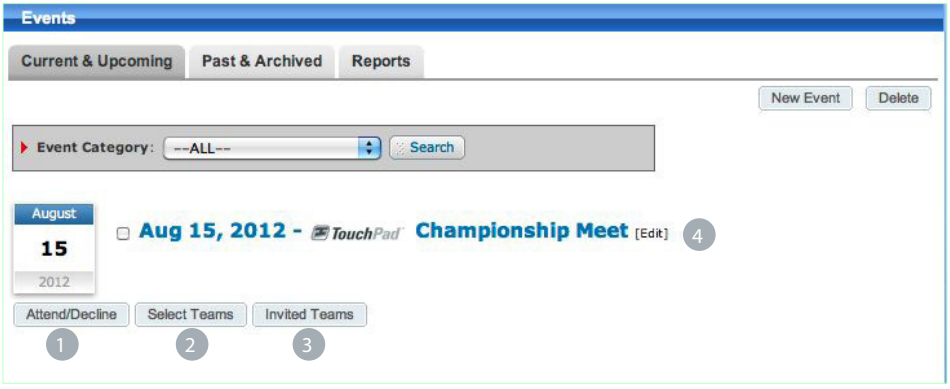
TUSync - Getting Started



Tips and Tricks

Before you sync we suggest you double check all of your information contained in the meet setup portion. Many of these preferences will enforce what and how times are used. It's easier to fix now instead of your visiting teams being confused.

1 **TUSync-** Once you have completed creating your events, select SYNC NOW or Ctrl + Y to sync to your TeamUnify site and invite teams to compete. If you have teams not on the TU platform you will need to duplicate the meet structure in meet management software that creates an EV3 or CL2 file and send the entries file.



Tips and Tricks

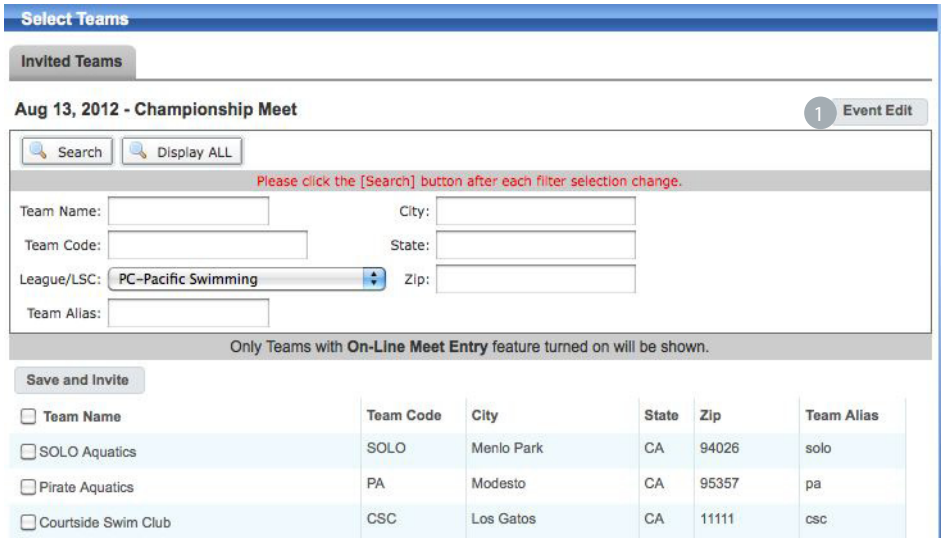
Before you invite teams, click on your meet title to ensure this information is correct. Check all dates, course type and information for accuracy.

1 **Attend/Decline-** Once you have synced the meet go to your site > events tab > and select the Attend/Decline button to begin your online entries process. It will immediately bring you into your edit screen to make any adjustments or additions to the event information.

2 **Select Teams-** Select teams will give you a list of teams to send the meet structure and meet invitation. The selected teams will then have the option to Attend/Decline within their SwimOffice site.

3 **Invited Teams-** Invited Teams allows access to the syncing dashboard. This dashboard allows you to communicate, monitor and control syncing and entries for your invited teams.

Meet Invite



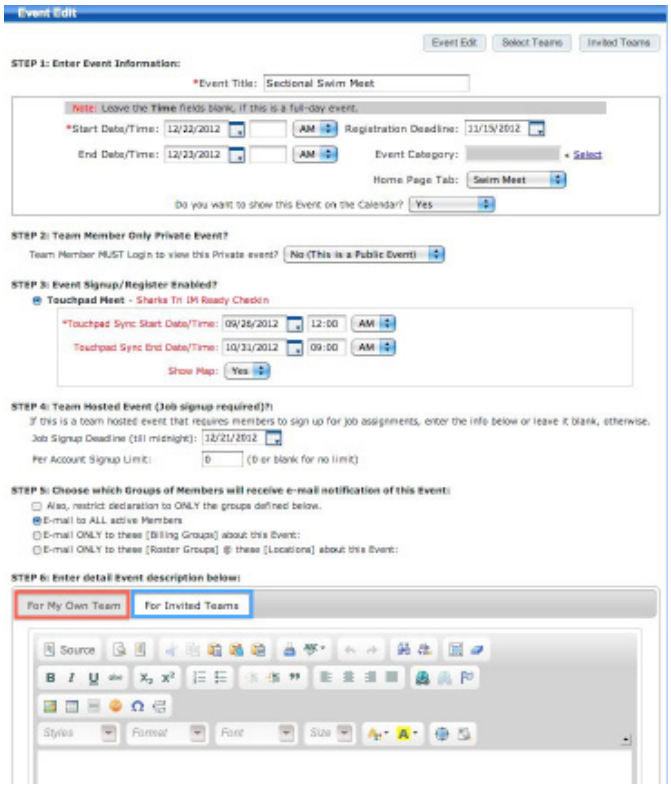
Tips and Tricks

Use your filters to ensure you are inviting the correct teams. Remember many teams share the same team name and you don't want mass confusion to ensue by inviting the incorrect Sharks Swim team.

1 **Event Edit-** Select the event edit to make any updates to the public facing event information. This will NOT be reflected on the other team sites that you invite. See more information below.

2 **Filters-** Either type in the team name to invite or use your filters to bring up those corresponding teams that are currently on the TeamUnify platform.

3 **Save and Invite-** Make your selection by placing a check mark in the box to the left of all invited teams and select the Save and Invite. This will place them into the Invited Teams tab where you can send them a pretemplated email, Un-invite a team and see an entries count once the invited team has synced their entries file.



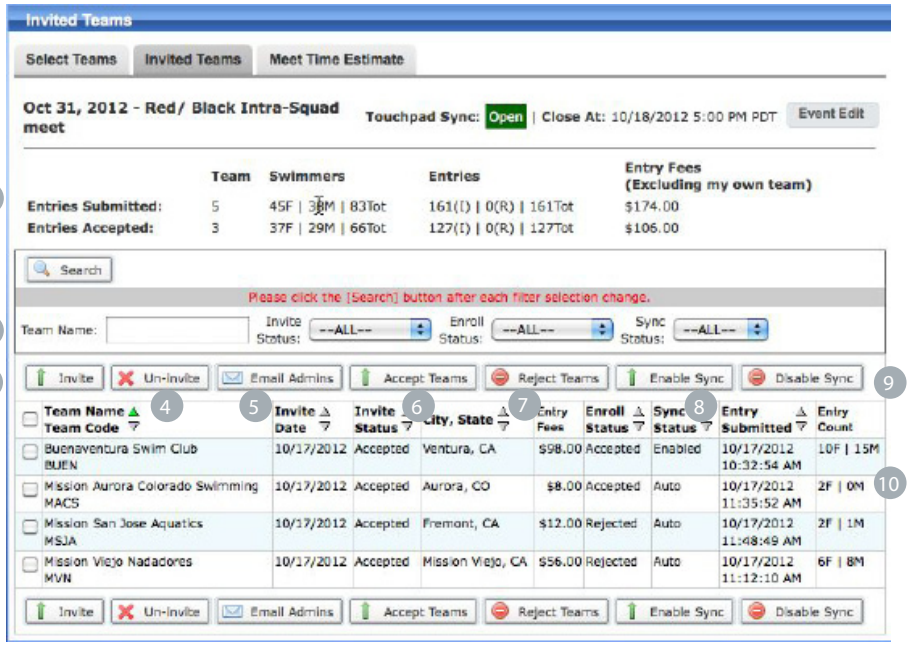
4 **Event Edit-** Update the Event title and dates if appropriate.

5 **TouchPad Meet Options -** Set the sync start and end date. This will cause an error message on your visiting teams if they are not within these parameters. Set your Google Map to show/ hide on your site and visiting teams. This information is pulled from your TouchPad Meet Setup.

6 Editor Options

1. **For My own team** will contain all meet information that is relevant to your team only.
2. **For Invited teams** will contain all of the meet information that you want released to your invited teams when they accept your meet invitation. Once they accept, any information located in this tab will appear in their event information. Invited teams will be able to edit this event and update any of this information.

Sync Dashboard



Tips and Tricks

Do you need to email your visiting teams? Select all, select Email Team Admins, delete all or some of the templated email and add your own information. Easy!

To ensure the meet will not go over your time-line, keep all teams set to 'Not Accepted' and use the Meet Time Estimate function to track. Accept the teams as appropriate.

1. Submitted Entries Dashboard - When a team syncs their entries to SwimOffice, this dashboard will show you the total count including the total entry fees (excluding your own team). Don't forget to accept the entries if you want them to sync to TouchPad

2. Filter - Use your filters to quickly view teams with those certain properties.

3. Invite - If a team declines your invitation but decides to accept it after the fact, you will need to place a check mark to the left of this team and invite again. This will light the event back up on their site.

4. Un-invite- If a team that has been invited decides to not swim or you need to un-invite a team, place a check mark to the left of the team name and select Un-invite. This will **REMOVE** the event from their SwimOffice site.

5. Email Team Admins- Make your selection by placing a check mark in the box to the left of all invited teams and select Email Team Admins. This will send them a pretemplated, editable email. See page 35 for an example.

6. Accept Teams - **CRITICAL -** Teams are defaulted to '**Not Accept'** and entries will be held in SwimOffice until you accept their entries to be synced with TouchPad. Place a check mark to the left of the team name and select Accept Teams.

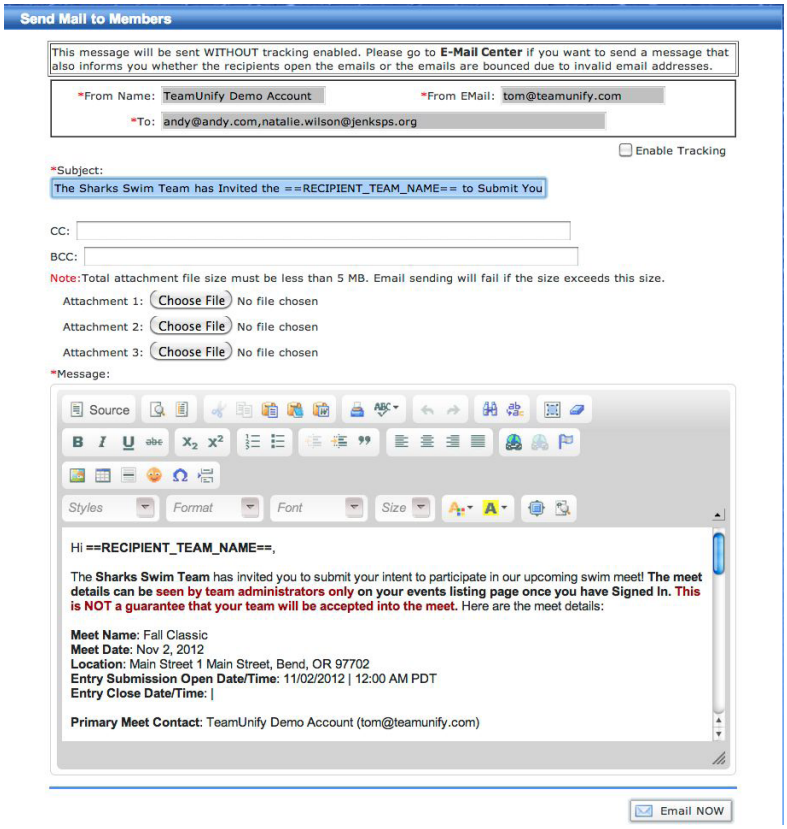
7. Reject Teams - To ensure a team will not have their entries synced to TouchPad, place a check mark to the left of the team name and select Reject Teams.

8. Enable Sync - Teams are defaulted to Auto sync entries to TouchPad. If you have disabled sync for a team you will need to enable that team in order for TouchPad to receive those entries.

9. Disable Sync - If you need to save entries for a team in SwimOffice, but not allow them to be synced to TouchPad, place a check mark to the left and Disable Sync.

10. Entry Information- When teams sync their entries this count will adjust to reflect a date stamp and entry numbers.

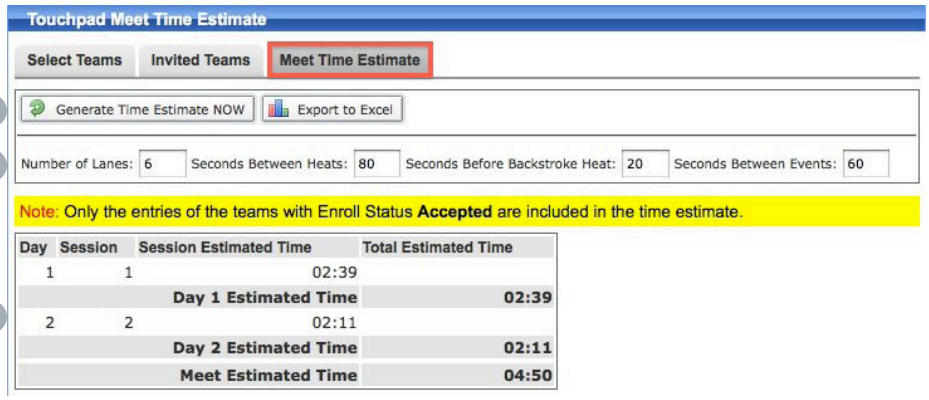
Sync Dashboard



Tips and Tricks

Do you need to send this email to several others on your team? An easy way to propagate the CC or BCC area is to go to Account Member Admin, place a check mark to the left of those accounts you wish to email, select the email button and copy those addresses. Go to your invite email and paste into the BCC line. Alternately you can copy the invite and paste into the Email Center.

1. **Pretemplated Email**- When you select Email Admins you will be taken to this screen above which allows you to add additional email addresses, attach any necessary meet files, and edit any content in the email. The email will pull information from your meet and include a link to easily allow those teams to either accept or decline their invitation.



Tips and Tricks

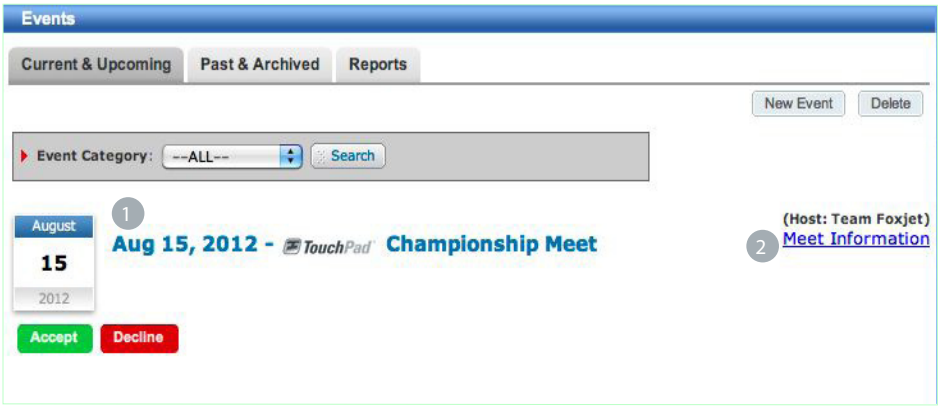
Accept teams based on the time stamp and run this report to see how many more teams can compete within the time limits.

1. **Generate Time Line Estimates** - Once you have accepted your selected teams and entered in your time between specific event parameters, generate these options to give you an estimated time line.

2. **Time Line Parameters**- This is **NOT** based on your event setup in TouchPad. You must manually enter in your selections based on your meet process.

3. **Time Line Estimate** - SwimOffice will generate a time line based on parameters that were set above and entries accepted. You can accept additional teams and regenerate to see if the team can compete.

Syncing Entries

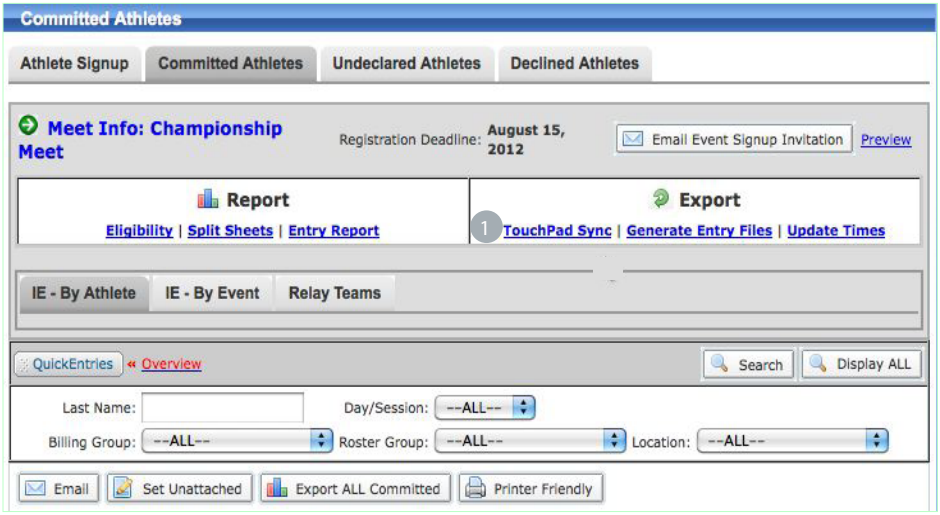


Tips and Tricks

Event categories are a great way to keep your events organized. Within your meet edit, select or create event categories to apply to each event.

1 TouchPad Sync Meet Information- Once you have invited a team to your event, the team will see the above on their admin side. Once the team accepts the invitation they will be able to edit the meet information and the meet will become publicly available for online entry.

2 Meet Information- This will show you the host name and meet information created by the host that will be publicly viewable and can be editable by the admin once they accept their invitation.

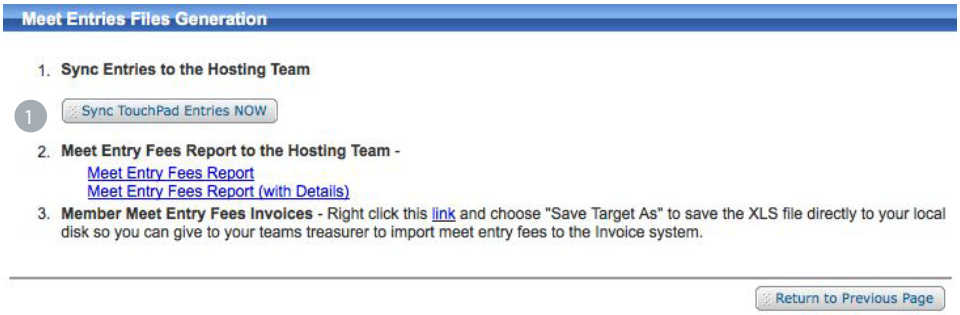


Tips and Tricks

Select the green arrow to the left of Meet Info. This information is from the TouchPad meet setup. Double check your dates, age up date and your use date since to ensure you haven't made errors

1 TouchPad Sync Export- When you have completed your event entries on TeamUnify you are ready to select the TouchPad Sync option to send your entries back to the host team. The host team will simply sync their TouchPad, File > SYNC NOW, which will pull in all entries.

Syncing Entries



Tips and Tricks

Did you know you can bill your meet fees using the results file? Check out the FAQ or tutorial.

1 Sync TouchPad Entries Now- Select this button when you are ready to push your entries file to the host.

Tips and Tricks

If your count is incorrect, adjust and sync again.

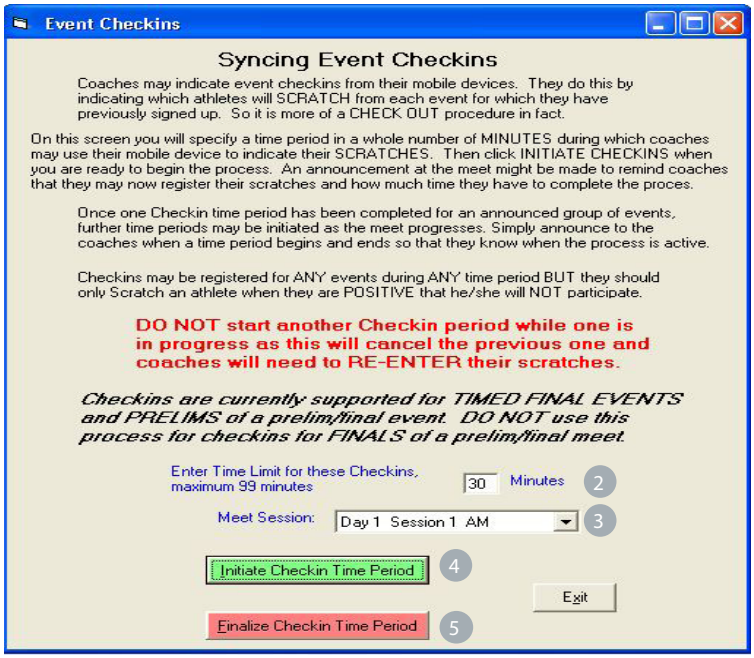
1 Syncing Success- If your entries have successfully synced to the host, SwimOffice will let you know the exact entry count that was sent otherwise it will message with any errors that may have occurred.

Manage Check-ins

Tips and Tricks

Don't forget OnDeck is a free app for both the iPhone/iTouch and Android phones. With TouchPad and OnDeck your job of administering a meet has never been easier. Look for continual enhancements. We love mobile!

1 **Manage Check-ins-** Manage Check-ins is the syncing functionality between TouchPad and OnDeck, TeamUnify's mobile application. Managing check-ins allows those teams that use OnDeck the ability to do positive check-ins, pushing the scratches directly to TouchPad.



Tips and Tricks

TouchPad, TeamUnify's Swim Office, TouchPad, and TUSync will revolutionize the way you run your team and your meets. Remind your visiting teams how easy check-ins are with the correct tools to make coaching *FAR* easier.

2 **Enter Time Limit-** Decide on the amount of time you are going to give the check-in admins to use their OnDeck mobile application to do a positive check-in for the meet. Maximum of 99 minutes.

3 **Meet Session-** Meet Session or Sequence is setup in your Event Setup. Select the sequence that you are doing check ins for.

4 **Initiate Check-in Time Period-** Once you select this button, a check-in button will appear in OnDeck > Swim Meets > Check-Ins. Deselect all events/athletes that will not be swimming ie: scratching.

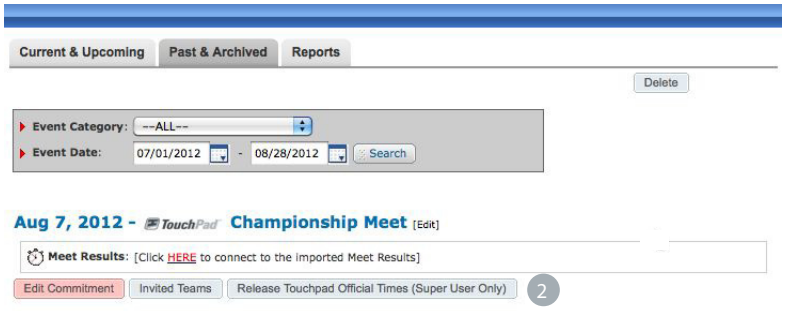
5 **Finalize Check-in Period -** Once the time has expired, select this option to push all scratch athletes to your scratch pad found under Seed > Scratch Pad. Confirm the sync and reseed your meet.

Syncing Results

Tips and Tricks

Don't forget, even if you have synced the results back to the visiting teams, you can adjust and resync to push the new data. Although your visiting teams can make changes, the host is the only one that can update all results using TUSync technology.

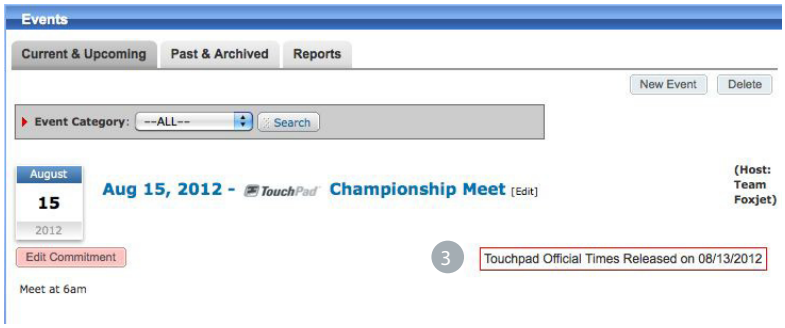
1 **Export Results**- Once the meet has been completed, select File > SYNC NOW and/or select File > Export to send non-TeamUnify teams the SD3 export file for results.



Tips and Tricks

Remember to send the zipped results file from TouchPad if you have non TeamUnify teams. TUSync will not update any other software but TeamUnify's SwimOffice.

2 **Release Touchpad Official Times (Super User Only)** - Once you have synced your results from TouchPad, the SuperUser will be given the ability to release the official results to all teams on the TeamUnify platform that competed in the meet.

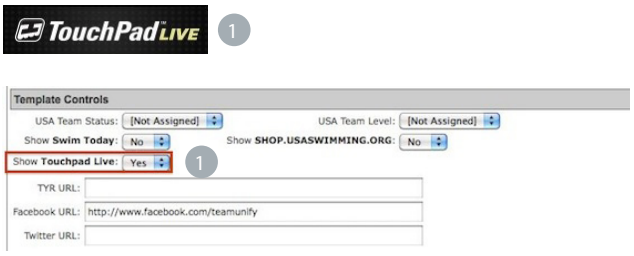


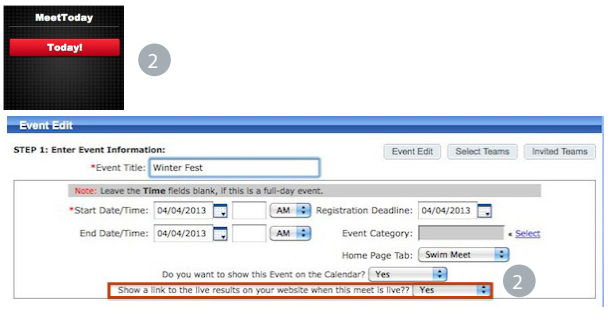
Tips and Tricks

TUSync was so easy even the tips and tricks are hard to develop. You almost don't need any help with TouchPad and TUSync!

3 **Competing Team Message**- Once you have released the official results, the visiting teams will be notified that the official results have been posted to their site. If the host makes time adjustments in **TouchPad** and syncs, all times on all visiting team sites will be updated. If a visiting team makes adjustments on their SwimOffice site it will not be reflected in other team site results.

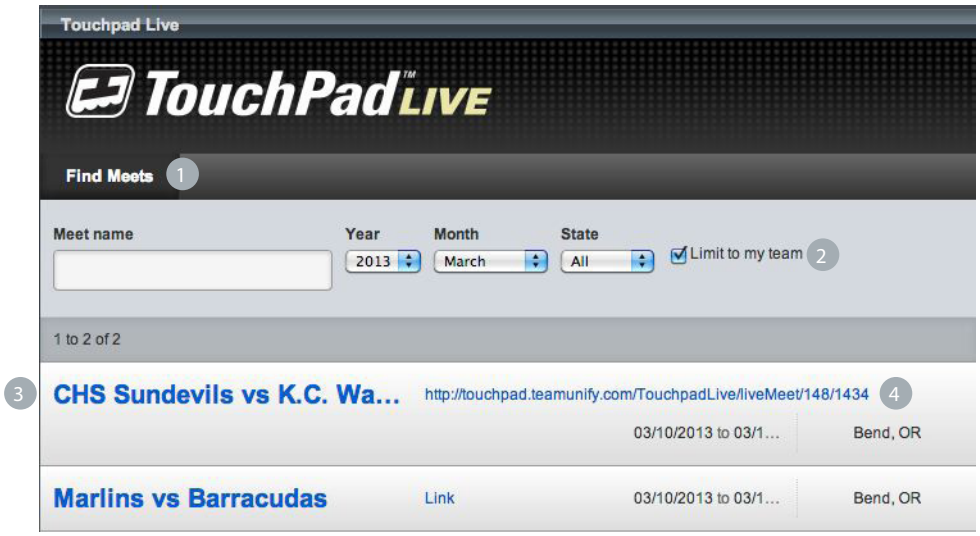
TouchPad *LIVE*





1 **Global Turn On/Icon** - Turn on your TouchPad Live portal. Go to Website Design > Website Layout Configuration and scroll down to template controls. This will show your TouchPad Live portal which will include all TouchPad meets on the TeamUnify system in addition to your own.

2 **Selective Turn On/Icon** - Turn on your TouchPad Live portal on a meet by meet basis. It will not show until the day of the meet and will shut off at completion of the day based on your settings in event setup.



Tips and Tricks

Use the 'link' to help your team and competing teams easily navigate to the live results for this meet. Simply copy and make one of your command buttons connect directly. Read this FAQ for details.

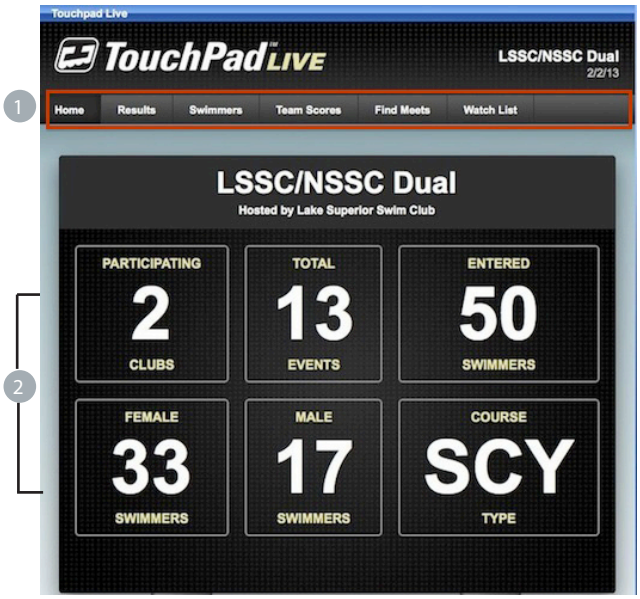
1 **Find Meets** - The first tab you'll be brought to. Locate your meet using the filters and select to bring up all additional detailed information.

2 **Filters** - Filters will help you narrow down the search. Ensure you select 'Limit to my team' to only bring up meets you have competed in. If not, all TouchPad meets from all TeamUnify teams will be viewable.

3 **Meets** - Select the meet you would like to see results for

4 **Link** - Click link to copy the URL and use this to attach to a command button, page, email etc.

TouchPad *LIVE*



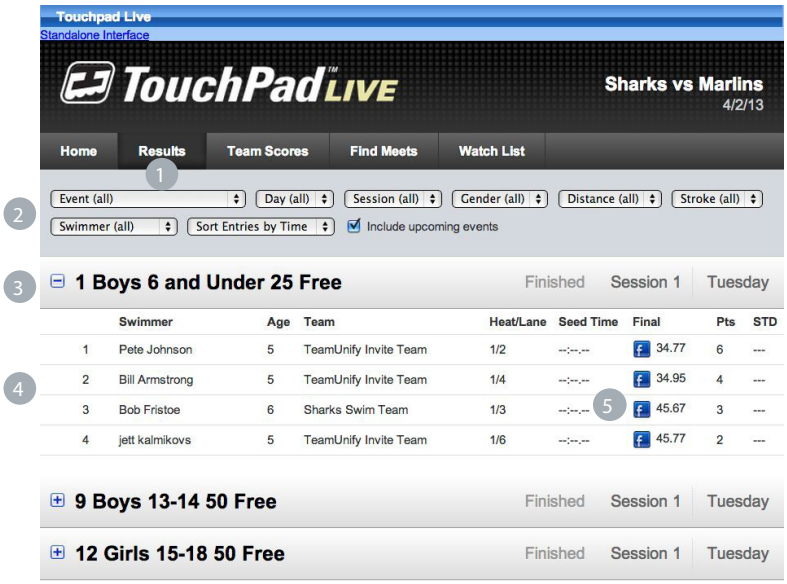
Tips and Tricks

Use the summary tab to quickly get an overview of the entire meet. It will include the meet name, date and all necessary counts for meet.

Take a screenshot and copy it onto your event page for a fun way to show the public the size and summary details of the meet.

1 **Ribbon Bar (meet specific)** - Once the meet has been selected, the ribbon bar becomes meet specific and all tabs will refer to this selected meet.

2 **Summary Information** - Meet specific information (summary of all tabs).



Tips and Tricks

Kids love to see their results instantly posted on Fb. Use the Facebook push to quickly update your site! Show your team how proud you are of them; instantly!

Don't forget, see into the future by selecting the option, 'Include upcoming events'.

1 **Results Tab**- Results related to the selected meet.

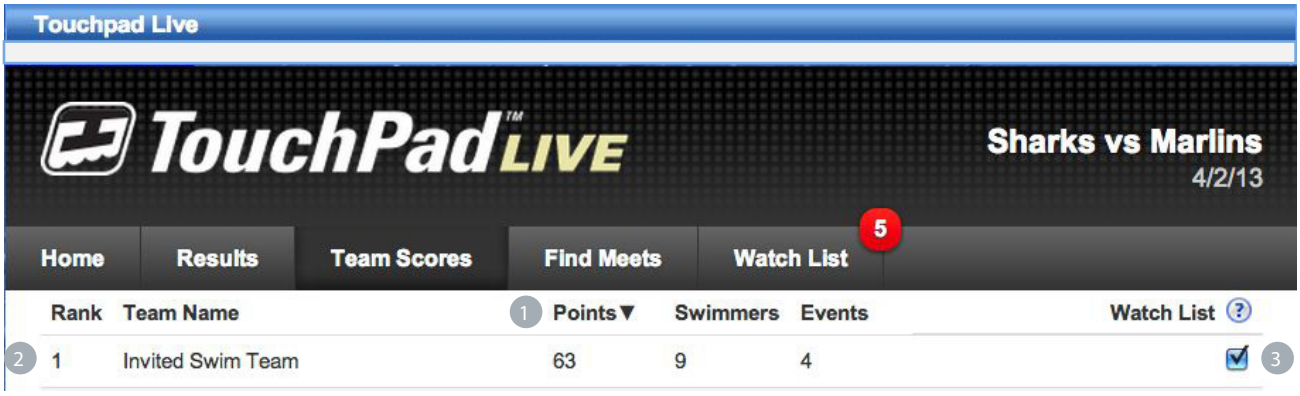
2 **Filters** - Applying any filters will automatically update details below

3 **Event Summary** - Summary information of event. Select + to expand.

4 **Event Detail** - Event detailed information once the + has been selected.

5 **Facebook notification** - Select the blue Facebook icon to push this result to your Fb account.

TouchPad *LIVE*

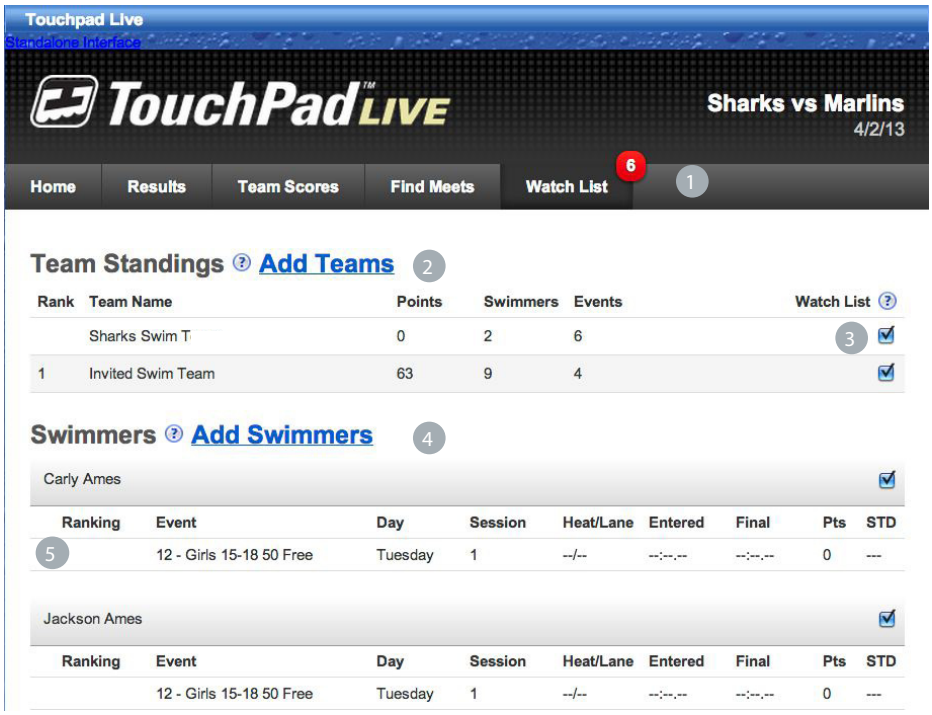


1 Team Scores- All teams competing in the meet and their summary information.

2 Summary Information- Summary of teams, points, number of swimmers and total events they're competing in.

3 Watch List- Place a check mark to the right of one or many teams to place into your Watch List tab.

TouchPad *LIVE*



Tips and Tricks

TouchPad Live, SwimOffice and On-Deck all work seamlessly to bring you the most advanced way to enter a meet, run a meet, time a meet, watch a meet and be truly part of a meet!

Events can start and end in a blink of an eye and now you can be sure to never miss another event! We love how interactive and dynamic TouchPad Live is!

1. **Watch List Tab** - The Watch List and Watch List number is based on selections from your Swimmer and Team Scores tab.
2. **Team Standings**- Summary information of how your team is doing in the meet compared to other teams.
3. **Watch List Checkmark**- De-select to take this team/swimmer out of your watch list.
4. **Swimmers** - Swimmer's name and detailed information based on your selection from the swimmer tab.
5. **Detailed Information** - Swimmer's detailed information by event #.

Notes

Notes

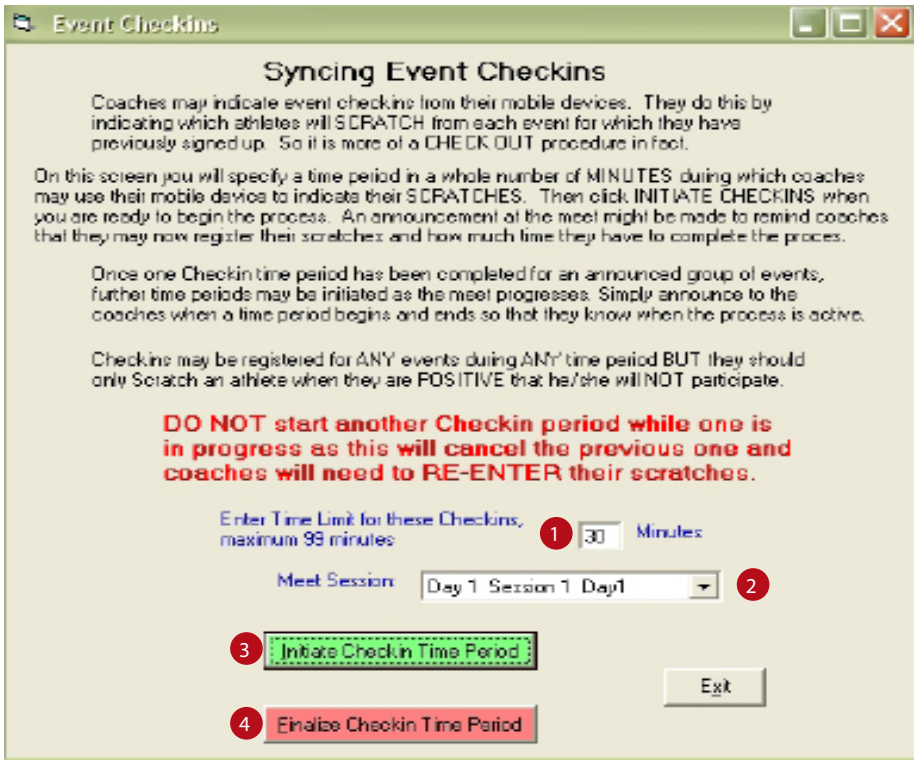
OnDeck™

Managing Check-ins

What you'll learn in this Section:

- Activating a Check-in with TouchPad
- Adding a Volunteer Administrator for Check-ins
- Checking Athletes in using OnDeck
- Tutorial: OnDeck Check Ins
- Tutorial: Sequence Creation for Check Ins

Activating Check-Ins in TouchPad



Tips and Tricks

Allow your parent volunteers the ability to help with athlete check-ins. This will greatly improve the speed and remove the cumbersome pen and paper processing normally done for meets

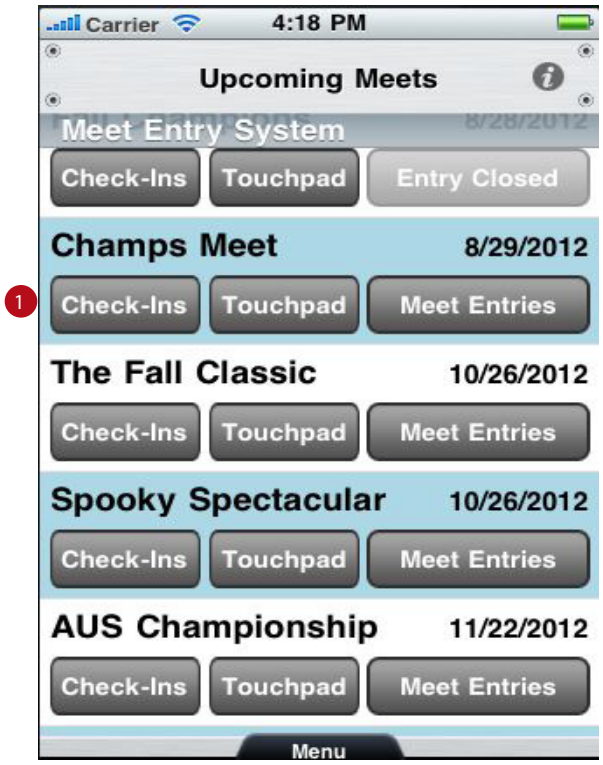
1. **Time Limit**- This allows administrators the ability to set the time period that check-ins can happen; up to 99 mins. Once set, a check-in button will appear on their OnDeck.

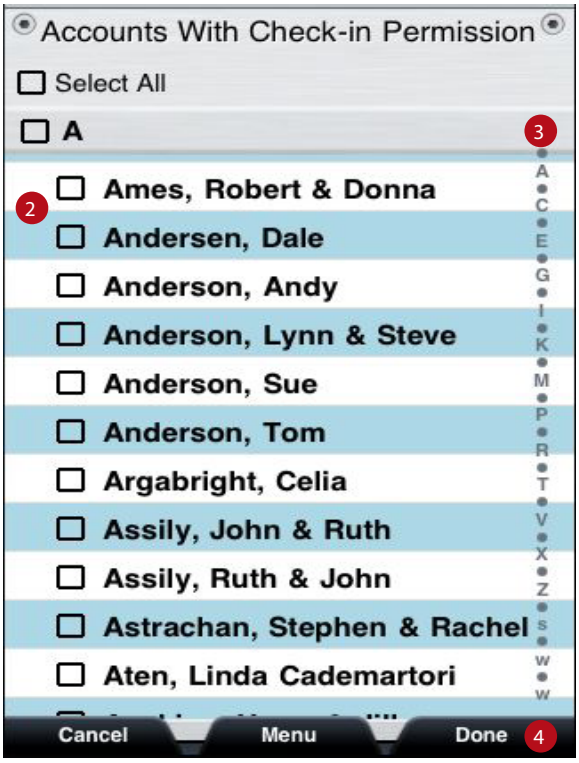
2. **Meet Session**- This allows you to select the Day and Session that you want the check-in period active for. This is pulled from the event setup.

3. **Initiate Check-in Time Period**- This will begin the defined check-in period and activate the check-in button in the upcoming meets screen (see page 42).

4. **Finalize Check-in Time Period**- This will close the defined check-in period and synch the check-ins with TouchPad.

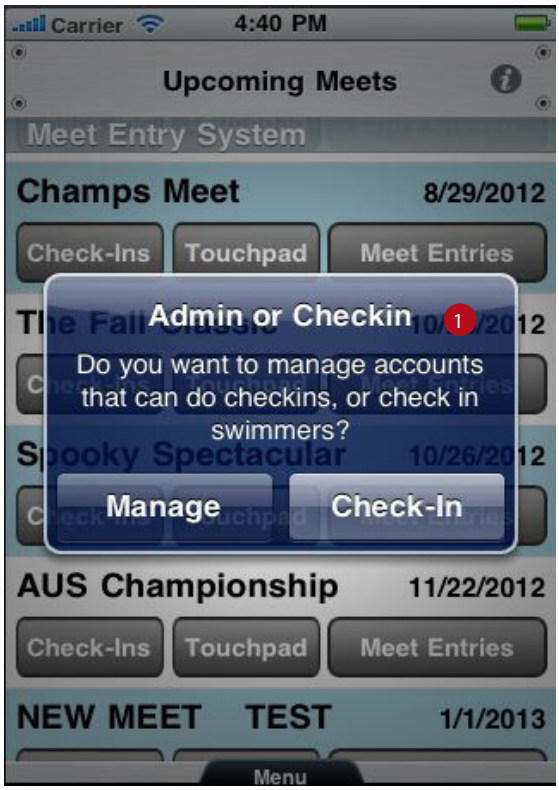
Adding a Volunteer Administrator for Check-ins

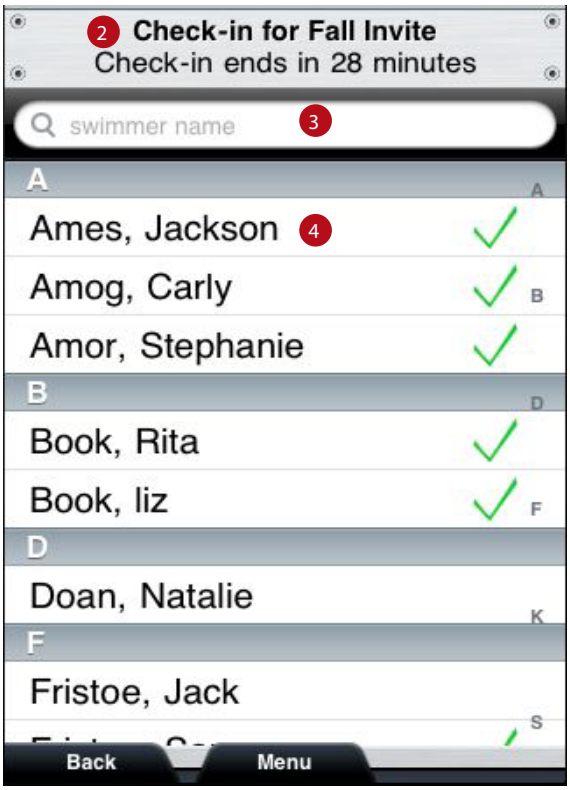




1. Check-Ins - This allows administrators access to both Check-in permissions and athlete check-ins.
2. Account Selection - This allows admins to select family accounts that they would like to give admin access to. This access is only for the check-in module. This module can be accessed through OnDeck Parent.
3. Jump To - Allows you to jump to an account based on the first letter of their last name.
4. Done - Once you have selected the desired accounts to administer the athlete check-in, they will added to the next scheduled synch. This will update their Parent OnDeck permission level for the selected meet only.

Checking Athletes in Using OnDeck





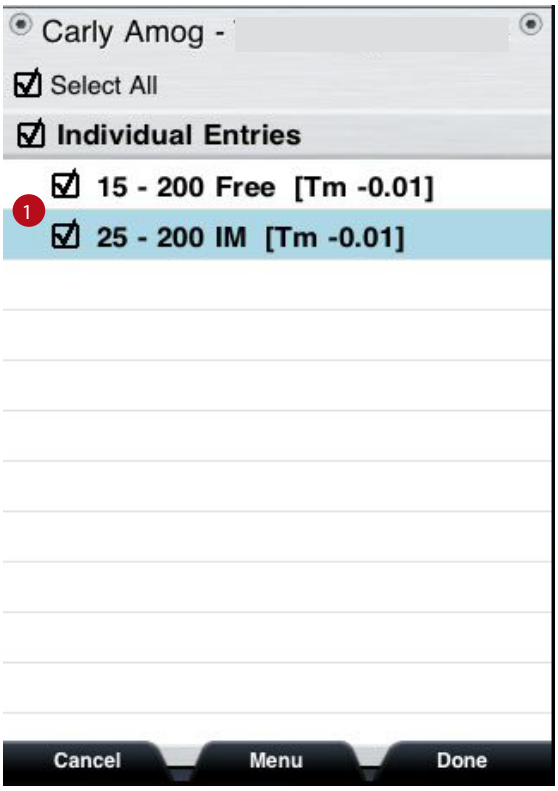
1. Admin or Check-ins - This allows administrators to choose between managing non admin access to check-in athletes and actually checking athletes into the meet. This is available when a Check-in session has been initiated from TouchPad.

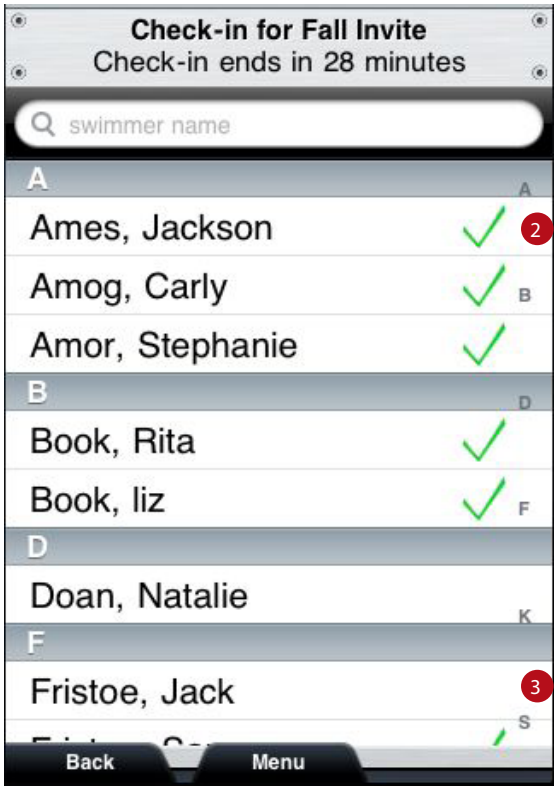
2. Check-In Meet Detail - This shows the meet name and time remaining before the check-in closes

3. Name Search - Allows admins to do a fuzzy word search on a specific swimmer's name.

4. Athlete Selection - Tapping on an athlete's name will bring up the events they have committed to for the selected day and session.

Checking Athletes in Using OnDeck



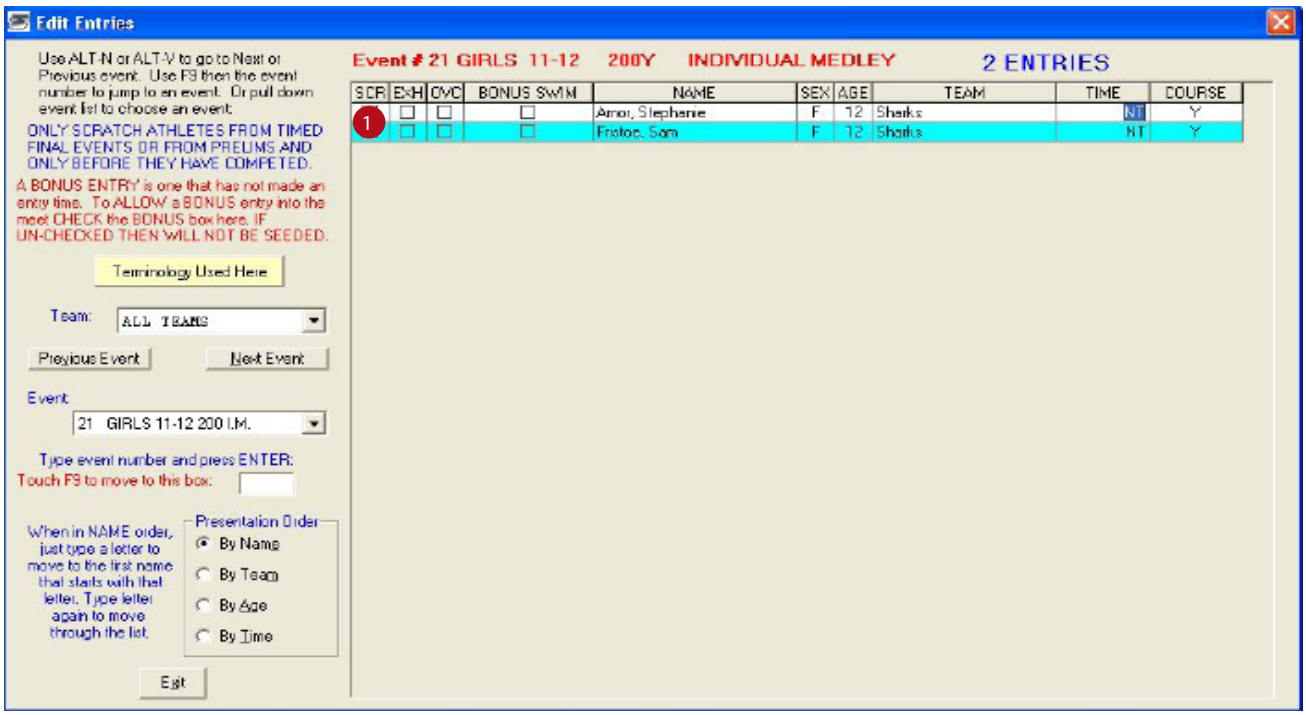


1. Athlete Event Selection Screen- tapping done with the events selected will check those athletes in, unchecked events will be recorded as a scratch.

2. Verified Check-ins - Once you have completed a check-in a green check mark will appear by that name. These selections will automatically be synched at the end of the check-in period as long as the mobile device is connected to the internet.

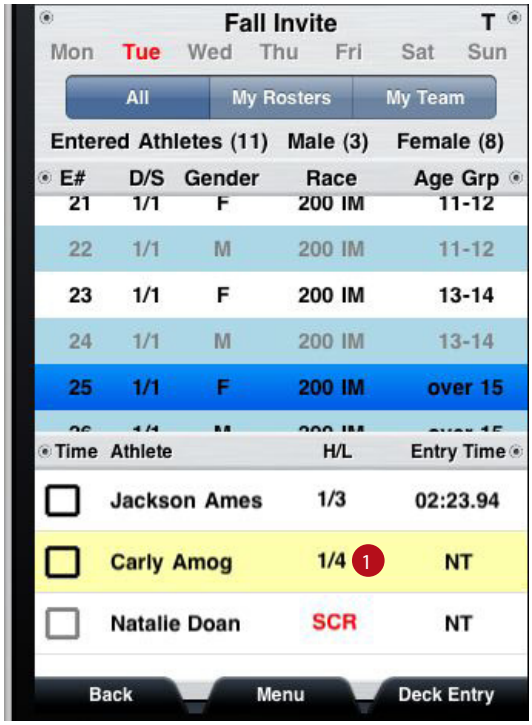
3. Scratched Athlete - Those athletes without any events selected will appear without a green check mark. At the end of the check-in period they will be recorded as a scratch. (Note: An athlete that is checked in for some events but not others will receive a green check mark but will scratch the unselected events).

Checking Athletes in Using OnDeck



1 **Scratch Pad** - When you return to TouchPad's scratch pad you will see that the checked out athletes are scratched. You will want to re-seed the meet and sync.

Checking Athletes in Using OnDeck



1 Heat and Lane- Once you have synced again your athletes will automatically be assigned to the correct heat and lane in OnDeck and if they were scratched it will be notated.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SwimOffice™
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GetOutSwim™
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TUMoney™
TouchPad™
TU University
www.teamunify.com
888.326.8643
info@teamunify.com