



ICEREG: REGISTRATION PATHWAY 1

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ABOUT THIS DOCUMENT

Content

This document outlines key configuration information and instructions relative to Registration Pathway 1 in IceReg.

Definitions

The following terms are applicable to this document:

- **SSC:** [Speed Skating Canada](#)
- **PTSO:** Provincial or Territorial Sport Organization. As an example, British Columbia's provincial sport organization is Speed Skating BC (SSBC).

SNAPSHOT

IceReg is a three-tier platform consisting of SSC memberships (top tier), PTSO memberships (middle tier), and club programs (bottom tier). Below is a snapshot of a standard purchase when a club uses Registration Pathway 1:



SSC Membership Fee (Top Tier)

SSC's membership categories, membership fees, waivers, etc. are configured within the **top tier** of the IceReg platform. All online and offline payment processing fees generated by a SSC membership fee in IceReg is absorbed by SSC.

PTSO Membership Fee (Middle Tier)

A PTSO's membership categories, membership fees, waivers, etc. are configured in the **middle tier** of the IceReg platform. Within the middle tier, each PTSO membership category is "linked" to a corresponding SSC membership category.

Clubs can contact their PTSO for information on the administration of the online and offline payment processing fees generated by a PTSO membership fee in IceReg.

Club Fee (Bottom Tier)

A club's settings are configured in their [club dashboard](#) (bottom tier) and must be reviewed and updated annually.

CLUB DASHBOARD

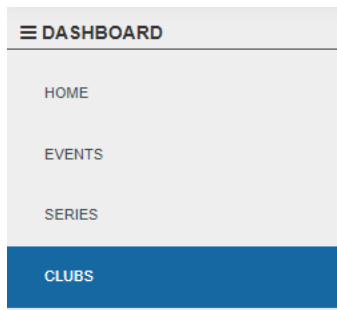
IMPORTANT

IceReg must be configured anew each season, and this involves three (3) separate onboarding phases which must be executed in order: the SSC dashboard is configured first, followed by a PTSO dashboard, and then a club dashboard.

Note the onboarding timeline may vary by PTSO / region and clubs can contact their PTSO for more information. Once a PTSO's dashboard is approved, the PTSO shall provide their clubs with a separate how-to guide outlining set-up steps to create a new club dashboard for the coming season. These set-up steps **MUST** be followed for a club dashboard to be approved in IceReg.

How do I access my club dashboard?

Go to the **Clubs** tab and select the relevant season.



The following tabs are available within each club dashboard:



If the tabs are not immediately visible, click on the three (3) horizontal bars:



Mandatory Settings

The mandatory settings outlined in the table below must be reviewed and updated each season:

Tab	Sub-tab / Section	Details
Club Listing	Club Name	
Club Listing	Listing Details	
Configuration	Overview	
Configuration	Content	Registration page description, email header, registration confirmation email, transaction successful message
Configuration	Contact	Club contact information
Configuration	Registration Categories and Registration Rules	Click here for detailed instructions on adding registration categories and applying registration rules. Note all registration rules must be added anew each season!

Optional Settings

The optional settings outlined in the table below can be reviewed and updated each season at a club's discretion:

Tab	Sub-tab / Section	Details
Club Listing	Social Media Links	
Configuration	Styling	
Configuration	Registration Forms	Club-level questions to ask registrants. Click here for more information on registration forms.
Configuration	MailChimp Setup	Click here for more information on adding a MailChimp account.
Configuration	Advanced Config	
Configuration	Agreements (Waiver / Policy)	Club-level documents for electronic signing (ex., waivers). Note documents shall be programmed per the age of

majority law of your province or territory. [Click here](#) for more information on agreements.

Configuration Stores

Configuration Email Notifications Configure email notifications for the club.

Configuration Waitlist [Click here](#) for more information on waitlists.

How do I validate my club dashboard settings?

All clubs are strongly advised to validate their settings and payment method(s) by executing test registrations. Click the **View Registration Page** button to execute a test registration.

When executing test registrations:

- **Do not** click the **Submit and Complete** button. If you accidentally click the **Submit and Complete** button, ensure the test registration(s) is cancelled.
- **Empty** the cart after each test registration

REGISTRATION CATEGORIES AND REGISTRATION RULES

Things to know

Before configuring registration categories and applying registration rules, clubs are strongly encouraged to review the key terms and considerations below:

Key Terms

- A **registration category** is the club level program being sold in IceReg.
- A **registration rule** dictates which PTSO membership (and corresponding SSC membership) must be purchased with the registration category. When a registration rule is added, the corresponding SSC membership is automatically added to the registration category as well. A registration category must have at least one (1) registration rule; a registration category without a registration rule cannot be sold in IceReg.
- **Single mapping** is when a registration category has only one (1) registration rule. When a single mapped registration category is purchased, the PTSO membership (and corresponding SSC membership) is automatically added to a purchaser's cart.
- **Multi-mapping** is when a registration category has multiple registration rules. When a multi-mapped registration category is purchased, the PTSO membership options (per the registration rules) will be displayed, and a purchaser must select their desired PTSO membership(s). Then the selected PTSO membership(s), and the corresponding SSC membership(s), are added to the purchaser's cart.

Key Considerations for Payment Groups

Some common operational needs surrounding payment groups and their suggested registration category configuration are outlined in the table below:

Operational Need	Suggested Registration Category Configuration
Club wishes to pay the SSC membership fee and PTSO membership fee on behalf of select groups (ex., coaches or officials).	<p>Create a single registration category with a \$0.00 fee. Then, contact info@icereg.ca and request that only the payment group option be presented to purchasers of that registration category.</p> <p>Note that the option to present purchasers with only the payment group option during the registration process is possible only once per registration rule. Where a single registration rule is used across multiple registration categories, the purchaser is presented with both the credit card payment option and the payment group option simultaneously.</p>

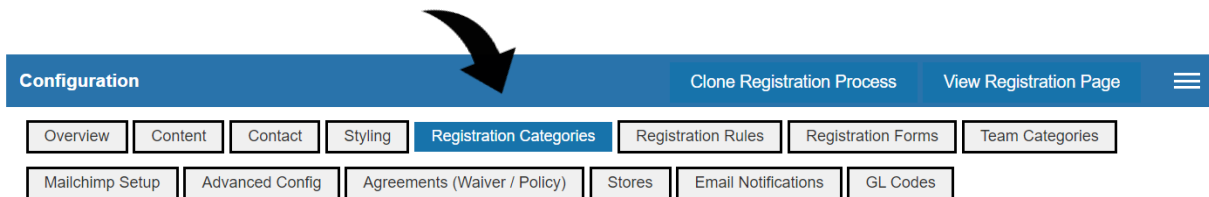
Club wishes to offer both credit card payments and offline payment for a single program.	<p>Since club level fees cannot be tracked in a payment group, clubs offering both credit card payments and offline payment for a single program can either:</p> <ul style="list-style-type: none"> ▪ Create a registration category for credit card payments (with the club fee) and a separate registration category (with a \$0.00 fee) for payment group registrations. Remember to name each registration category accordingly. ▪ Create a single registration category and provide a coupon code for the club level fees for payment group registrations, as needed.
Club wishes to limit access to the payment group.	A passphrase can be configured in the Payment Groups tab (main menu).

How do I create a registration category and apply a registration rule?

To create a registration category, go to the **Clubs** tab, select the relevant season, and follow the steps below:

1. Go to the **Configuration** tab and then the **Registration Categories** sub-tab. Create a registration category (club program) and enter the relevant program information (name, description, fee*, etc.).

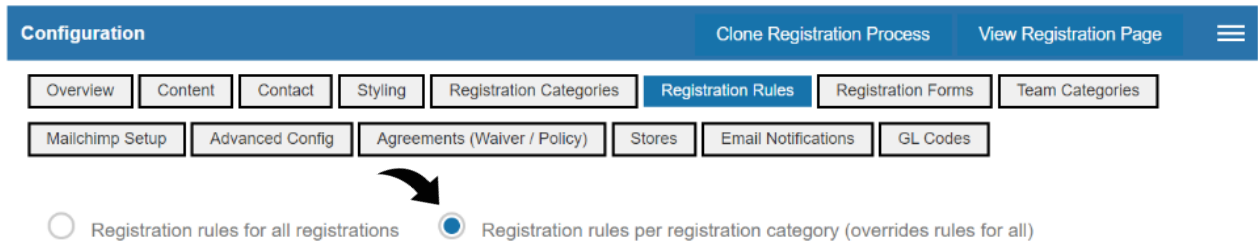
**Do not include a SSC membership fee or PTSO membership fee, as they are pre-configured in the top tier and middle tier, respectively.*



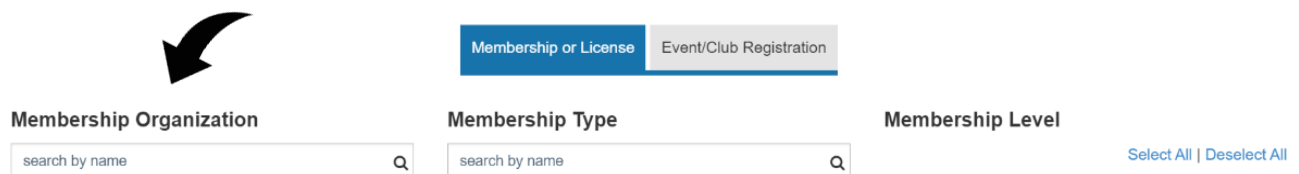
2. Go to the **Registration Rules** sub-tab.



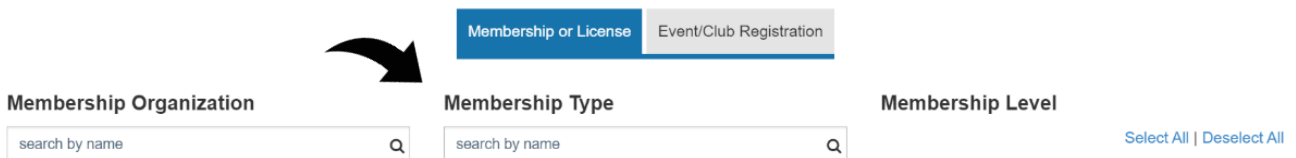
3. Check the **Registration rules per registration category (overrides rules for all)** circle, which allows you to apply the relevant registration rule(s) to each individual registration category.



4. Click the green **Add Rule** button next to the registration category to add a registration rule. Click **Membership or Licence**. Under the **Membership Organization** options, **select your PTSO**.



5. Under **Membership Type**, select the PTSO membership (registration rule) that must be purchased by the registrant. Please deselect, as needed.



6. Click **Save**. Add another registration rule, as needed. Note the **Actions** button allows you to edit an existing registration rule.

PAYMENTS BY INSTALLMENT

How it works

To configure installments for club fees, send a request to info@icereg.ca with the following information for each registration category requiring installments:

- Name of the registration category.
- Number of installments.
- Type of installment; there are two (2) options:

Option 1 - Based on the initial purchase date: if the initial purchase date is September 20, the second installment is due 30 days later, and then the third installment is due 60 days later, etc.

Option 2 - On a specific date: the club determines which days the installments are charged regardless of the initial purchase date. For example, if the initial purchase date is September 20, then the second installment can be due on October 1.

To keep in mind

- Installments can **only** be configured for club level fees, which are split equally amongst the installments. The first installment is due at the initial purchase.
- The SSC membership fees and the PTSO membership fees are due at the initial purchase.
- Registration categories with installments should be labeled accordingly. If a club wants to offer the option to pay in full **or** pay by installment for a single program, create a registration category with no installments (ex., Learn to Skate 2x Week – Full, One-Time Payment) **and** create a separate registration category with installments (ex., Learn to Skate 2x Week – 4 Installments).
- Each installment will generate a separate registration within a club's dashboard and registration reports. Note this will impact the maximum capacity function.
- Any waiver signatures (club waivers) only appear with the initial registration.

Configuration fees

As noted above, installments are currently configured by the IceReg support team (info@icereg.ca). One (1) hour of configuration time is allotted to each club, per season, at no additional cost for the purposes of configuring installments. Note one (1) hour of configuration time yields a minimum of twelve (12) registration categories with installments. Additional configuration is \$60.00 +tx per hour, charged to the club; the IceReg support team shall advise clubs in advance if additional configuration is required. **Clubs are therefore strongly advised to**



be clear and concise with their installment requests to maximize their allotted configuration time.



COUPONS

[Click here](#) for instructions on creating coupon codes. Note that coupon codes **only** apply to club level fees and **cannot** be configured for family discounts.