IceReg: Registration Pathway 2

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ABOUT THIS DOCUMENT

Content

This document outlines key configuration information and instructions relative to Registration Pathway 2 in IceReg.

Definitions

The following terms are applicable within 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 2:

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.

$0.00 Club Fee
(Bottom Tier)

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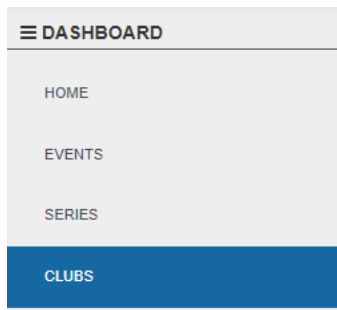(bottom tier) and must be reviewed and updated annually.

Club Dashboard

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 (at $0.00) 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 typically the club level program sold in IceReg. However, in the context of Registration Pathway 2, a registration category represents a PTSO membership (and corresponding SSC membership) and must have a $0.00 fee.
- 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 without a registration rule cannot be sold in IceReg.

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).	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. 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.
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 separate **registration category** for each separate PTSO membership (and corresponding SSC membership) your club wishes to sell in IceReg. The name assigned to each registration category can either reflect the club's terminology (club program names) or the PTSO's terminology (PTSO membership categories). **Ensure the registration category has a $0.00 fee, as the SSC membership fee and PTSO membership fee are pre-configured in the top tier and middle tier, respectively.**
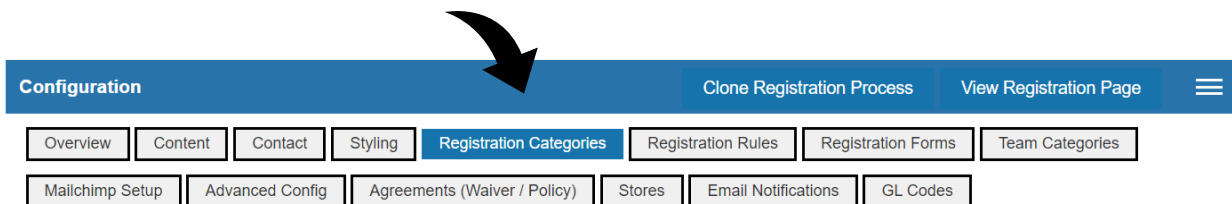

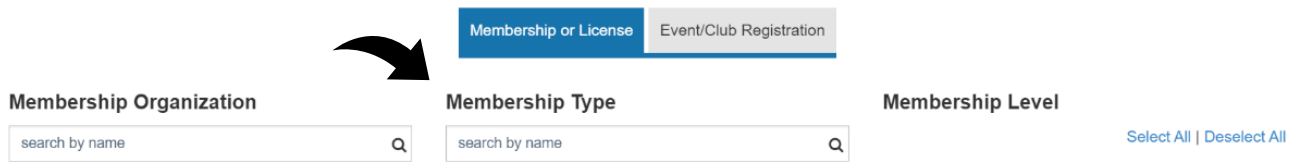2. Go to the **Registration Rules** sub-tab.
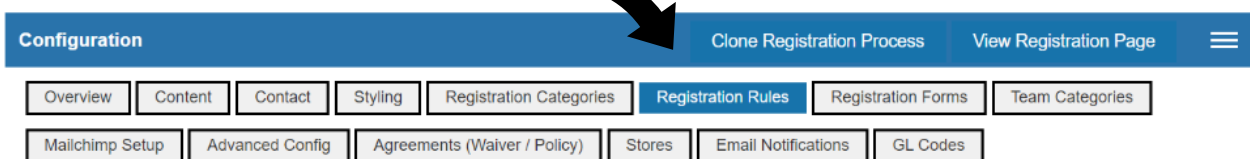
3. Check the **Registration rules per registration category (overrides rules for all)** circle to add a **single** registration rule to each registration category.
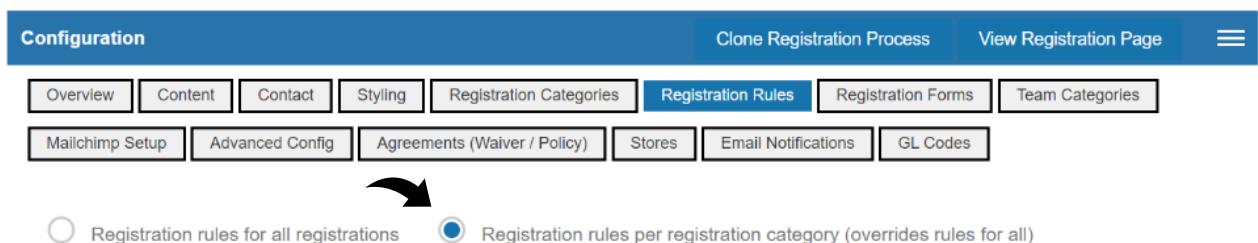
4. Click the green **Add Rule** button next to the registration category to add the PTSO membership (registration rule). Click **Membership or Licence**. Under the **Membership Organization** options, **select your PTSO**.
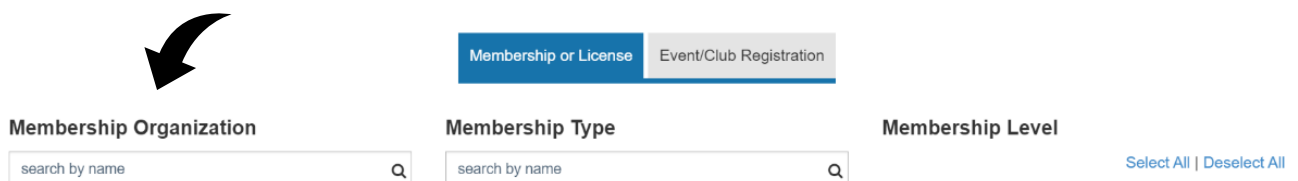
5. Under **Membership Type**, select the PTSO membership (registration rule) that must be purchased by the registrant. Please deselect, as needed. Note the corresponding SSC membership will be automatically added.

6. Click **Save**. Note the **Actions** button allows you to edit an existing registration rule.