JSA PROGRAM DIRECTOR USER GUIDE

May 24, 2018

Overview

This addendum is intended to provide additional information for Junior Sailing Association of Long Island Sound (JSA) administrators and Program Directors to help manage the JSA membership database and registrations as contracted with Regatta Toolbox in December of 2017.

Regatta Toolbox was contracted to build custom code on top of our regular platform to meet JSA's requirements to provide a seamless experience for parents, sailors, administrators, program directors, and regatta organizers.

For a more comprehensive overview of our entire platform, please refer to the Regatta Toolbox User Guide.

Have fun and sail fast!

Regatta Toolbox

Getting Started

To get started, head to www.regattatoolbox.com and click the log in/sign up button in the upper right. If you do not have an account, make sure you are completing the information in the sign-up tab. If you already have an account, please select the log in tab.

Once your account is created, you will be prompted to upload an image. If you are an organizer, we recommend uploading an image or your Club's burgee or other identifying image. If you are a sailor, we recommend uploading a passport style headshot.

JSA Program Directors

Designated Program Directors will be given additional access privileges by the JSA Board. Only the JSA Board has the ability to add or remove Program Directors. This section details the additional options you gain once added as a Program Director for JSA.

Dashboard

After logging in to your Regatta Toolbox account, you will see an additional menu option titled **Clubs**. Clicking on this will take you to your Club(s) to manage members, regattas, entries, payments, and coaches as detailed below. It is possible for a Program Director to have access to more than one Club.

Clubs

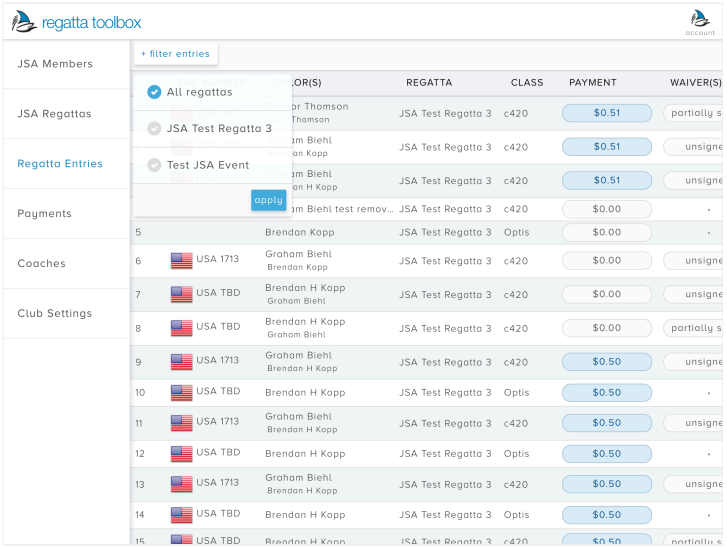
JSA Members
This menu option is the default when accessing the Club section as a Program Director. The list shows details for all associated sailors that joined JSA under the specified Club. Program Directors do not have the ability to make updates to individual memberships or view any additional details other than name, email, phone, JSA member status, and waiver status.

JSA Regattas
The JSA Regattas menu option displays all JSA events that require JSA membership, and have 'Public' access turned on. Essentially if a regatta is viewable here, it is generally available to enter online.

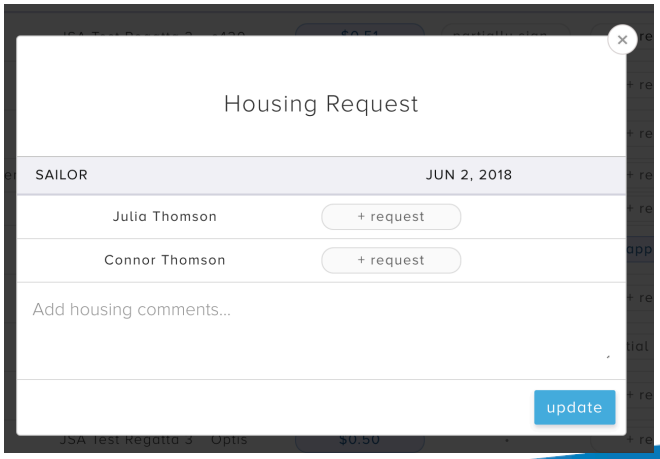
Regatta Entries
This option will show all of your regatta registrations relative to your Club for all past and upcoming events. You may filter the entries by clicking the **+ filter** button located above the first column.

To make any updates including adding a crew, or updating a sail number, you can click on the desired entry row to do so.

To view payment details for a registration, you can click on the column that shows a monetary value.

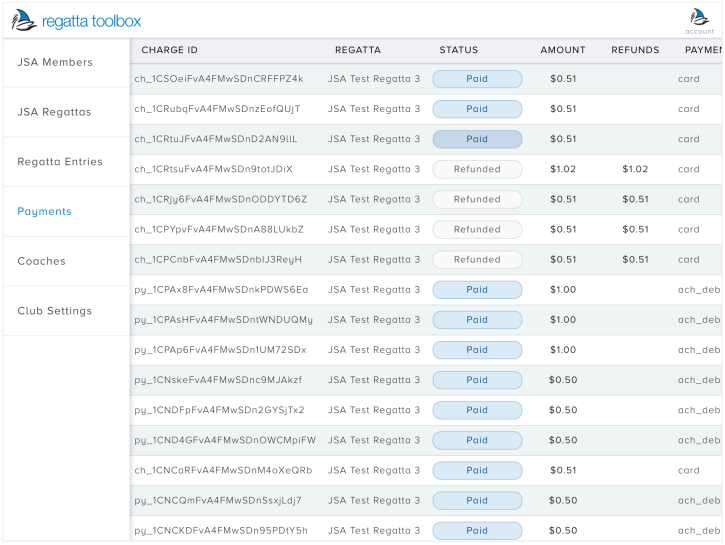


If you need to request housing for an individual entry or a team, you can click on **+ request** in the housing column. Click on the dates in which the individual(s) will need housing, and the request will be made to the organizer. You may add additional comments in the section below for the OA to consider. Be sure to click **update** in order for the request to be saved and submitted. When a housing request is approved, you will see the status changed automatically which will read **approved**. In the instance when only part of the request is approved, you will see a status of **partially approved**.



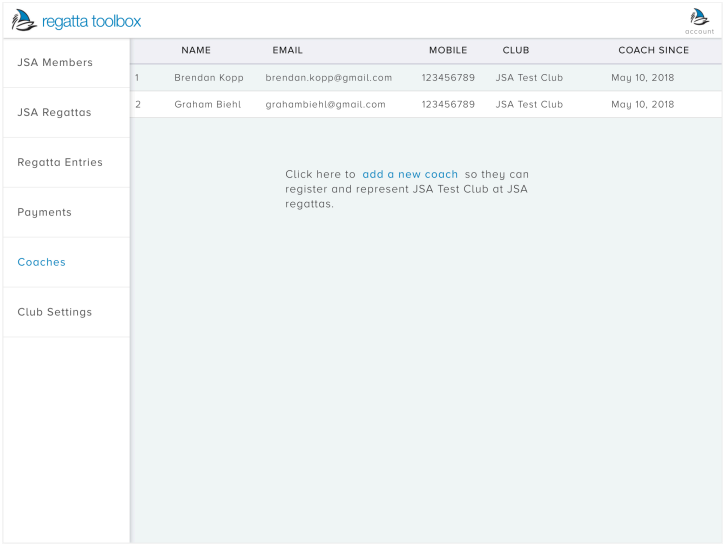
Payments

This option shows all of your registration payments, and their associated status. Status' include pending, paid, and refunding. A pending status will only display when and ACH Debit transaction is used as the payment method. The pending status may take several days and will be updated automatically upon approval. The **CHARGE ID** should be used whenever referencing a transaction to the OA to locate the payment quicker.



Coaches

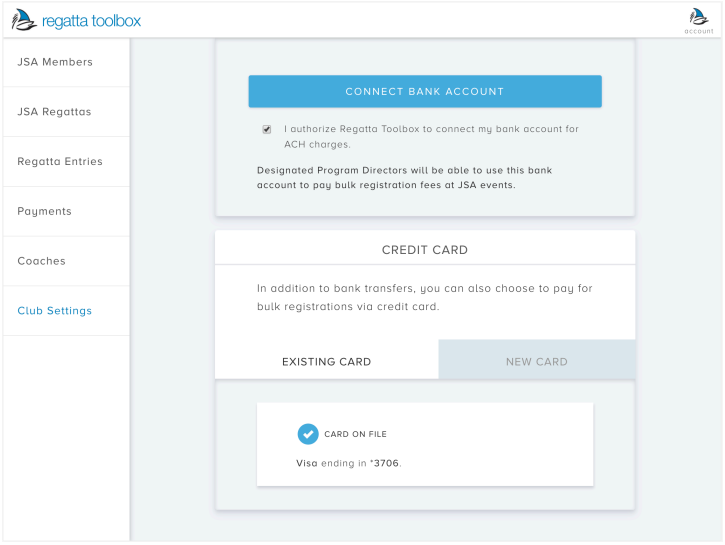
Use the Coaches tab to manage your coaches for JSA events. To add a coach, click **add a new coach** and complete all input fields accurately.



Club Settings

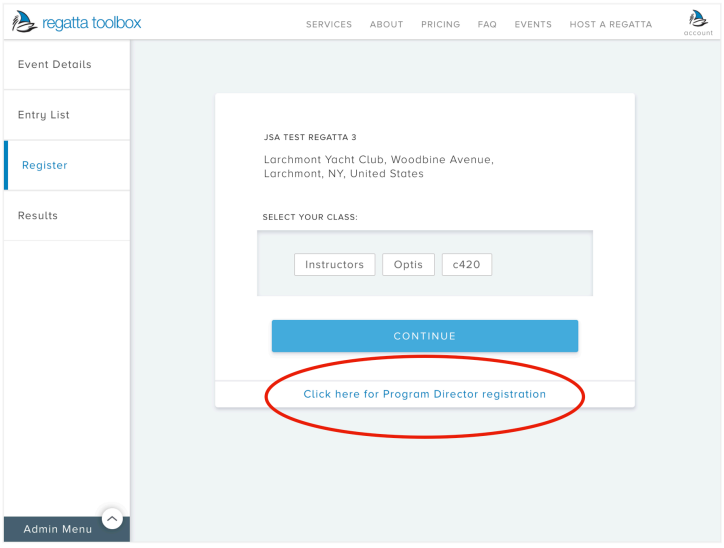
The Club Settings tab is where you can add your preferred payment method for event entries.

The recommended method is via bank account (ACH Debit). **IMPORTANT:** please double check with your Club Controller or Accountant to make sure you are using the correct banking details. Only in serious situations will Regatta Toolbox allow a bank account to be changed. If you prefer paying via credit card, you may add one on file as well below the bank account area. You will be able to choose which payment method you prefer during the online entry payment process.

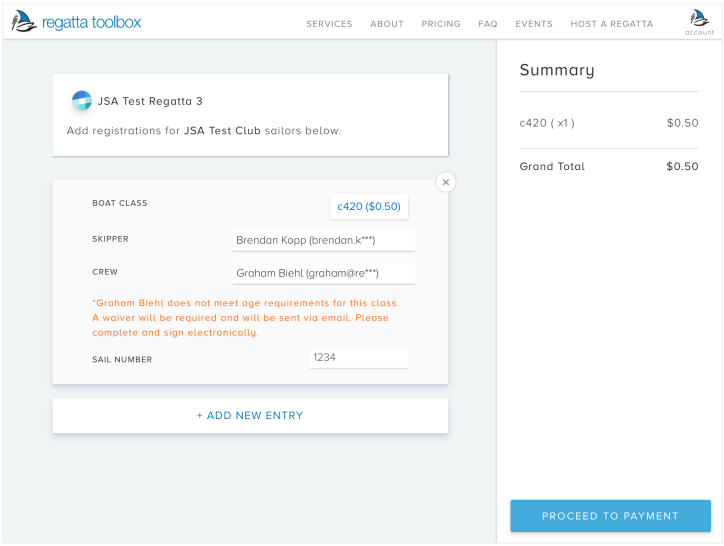
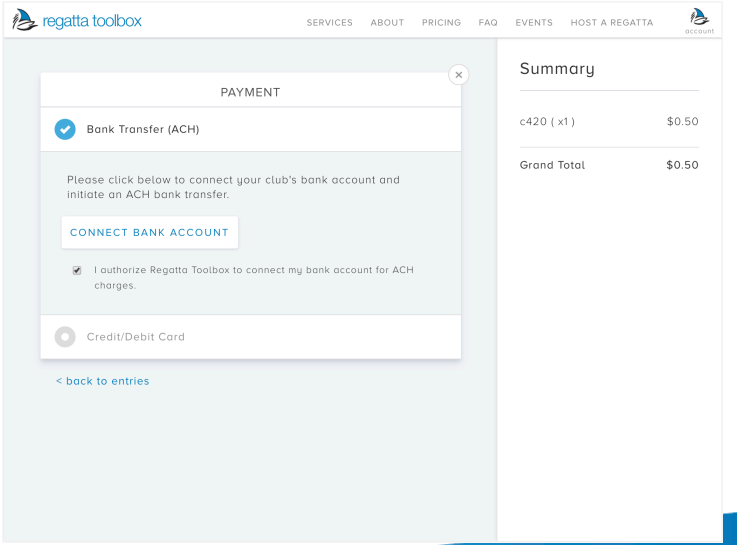


Bulk Regatta Registration

As a designated JSA Program Director, you have the ability to perform bulk registrations for any JSA sanctioned events. To access the bulk registration, you need to be logged in as a Program Director, and then navigate to the registration page for the specific event. Under the normal boat class options, you will see a new option that reads **Click here for Program Director Registration**. Click the box and then proceed by clicking **+ ADD NEW ENTRY**.



To add entries, click on the boat class name which also displays the entry fee. In the SKIPPER section, start typing the sailor's name, then select from the list. If the entry is double-handed you should add a crew in the same manner. Lastly, enter a sail number. If you do not know it, you can enter TBD. Once you have finished an entry, you can click **+ ADD NEW ENTRY** to add any subsequent entries. If you do not know who the crew is at the time, you may skip adding a crew and add at a later date.



When you are ready to complete registration and make a payment, you can click **PROCEED TO PAYMENT**. On the checkout page, you will see options to complete payment via an ACH Direct Deposit (preferred) or via credit card.