

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 of 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.

	SAILOR(S)	REGATTA	CLASS	PAYMENT	WAIVER(S)
JSA Members	+ filter entries				
JSA Regattas	dr Thomson Thomson	JSA Test Regatta 3	c420	\$0.51	partially s
Regatta Entries	Jim Biehl on H Kopp	JSA Test Regatta 3	c420	\$0.51	unsigne
Payments	Jim Biehl on H Kopp	JSA Test Regatta 3	c420	\$0.51	unsigne
	Jim Biehl test remov...	JSA Test Regatta 3	c420	\$0.00	-
	Brendan Kopp	JSA Test Regatta 3	Optis	\$0.00	-
Coaches	USA 1713 Graham Biehl Brendan Kopp	JSA Test Regatta 3	c420	\$0.00	unsigne
	USA TBD Brendan H Kopp Graham Biehl	JSA Test Regatta 3	c420	\$0.00	unsigne
Club Settings	USA TBD Brendan H Kopp Graham Biehl	JSA Test Regatta 3	c420	\$0.00	partially s
	USA 1713 Graham Biehl Brendan H Kopp	JSA Test Regatta 3	c420	\$0.50	unsigne
	USA TBD Brendan H Kopp	JSA Test Regatta 3	Optis	\$0.50	-
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	USA 1713 Graham Biehl Brendan H Kopp	JSA Test Regatta 3	c420	\$0.50	unsigne
	USA TBD Brendan H Kopp	JSA Test Regatta 3	Optis	\$0.50	-
	USA TBD Brendan H Kopp	JSA Test Regatta 3	c420	\$0.50	partially s

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**.

SAILOR	JUN 2, 2018
Julia Thomson	+ request
Connor Thomson	+ request

Add housing comments...

update

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.

	CHARGE ID	REGATTA	STATUS	AMOUNT	REFUNDS	PAYMEI
JSA Members	ch_1CS0eiFvA4FMwSDnCRFFP24k	JSA Test Regatta 3	Paid	\$0.51		card
JSA Regattas	ch_1CRubqFvA4FMwSDnzEofQJt	JSA Test Regatta 3	Paid	\$0.51		card
	ch_1CRtUjFvA4FMwSDnD2AN9iL	JSA Test Regatta 3	Paid	\$0.51		card
Regatta Entries	ch_1CRtsuFvA4FMwSDn9tstJDiX	JSA Test Regatta 3	Refunded	\$1.02	\$1.02	card
Payments	ch_1CRjy6FvA4FMwSDnODDYTD6z	JSA Test Regatta 3	Refunded	\$0.51	\$0.51	card
	ch_1CPYpvFvA4FMwSDnA8BLukbz	JSA Test Regatta 3	Refunded	\$0.51	\$0.51	card
Coaches	ch_1CPCnbFvA4FMwSDnbiU3ReyH	JSA Test Regatta 3	Refunded	\$0.51	\$0.51	card
Club Settings	pg_1CPAv8FvA4FMwSDnkpDWS6Ea	JSA Test Regatta 3	Paid	\$1.00		ach_deb
	pg_1CPAsHFvA4FMwSDnWNUDQMj	JSA Test Regatta 3	Paid	\$1.00		ach_deb
	pg_1TCPap6FvA4FMwSDn1UM72SDx	JSA Test Regatta 3	Paid	\$1.00		ach_deb
	pg_1CNskeFvA4FMwSDnc9MJakzf	JSA Test Regatta 3	Paid	\$0.50		ach_deb
	pg_1CNDfPvFvA4FMwSDn2GYSJTx2	JSA Test Regatta 3	Paid	\$0.50		ach_deb
	pg_1CND4GfVvA4FMwSDnOWCmpIFW	JSA Test Regatta 3	Paid	\$0.50		ach_deb
	ch_1CNCaRFvA4FMwSDnM4oXeQRb	JSA Test Regatta 3	Paid	\$0.51		card
	pg_1CNCQmFvA4FMwSDnSxxLdj7	JSA Test Regatta 3	Paid	\$0.50		ach_deb
	pg_1CNCCKDFvA4FMwSDn95PD1Y5h	JSA Test Regatta 3	Paid	\$0.50		ach_deb

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.

	NAME	EMAIL	MOBILE	CLUB	COACH SINCE	
JSA Members	1	Brendan Kopp	brendan.kopp@gmail.com	123456789	JSA Test Club	May 10, 2018
JSA Regattas	2	Graham Biehl	grahambiehl@gmail.com	123456789	JSA Test Club	May 10, 2018
Regatta Entries	Click here to add a new coach so they can register and represent JSA Test Club at JSA regattas.					
Payments						
Coaches						
Club Settings						

Club Settings

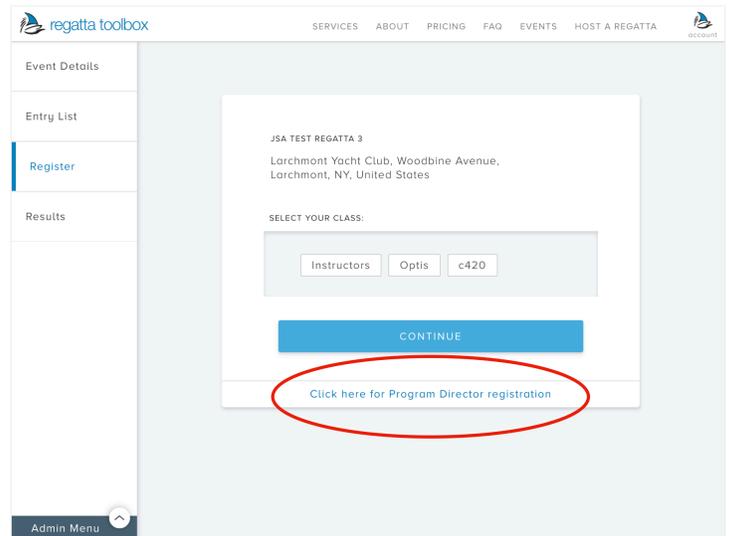
The Club Settings tab is where you can add your preferred payment method for event entries.

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.

	CONNECT BANK ACCOUNT
JSA Members	<input checked="" type="checkbox"/> I authorize Regatta Toolbox to connect my bank account for ACH charges. Designated Program Directors will be able to use this bank account to pay bulk registration fees at JSA events.
JSA Regattas	
Regatta Entries	
Payments	
Coaches	
Club Settings	<p>CREDIT CARD</p> <p>In addition to bank transfers, you can also choose to pay for bulk registrations via credit card.</p> <p>EXISTING CARD NEW CARD</p> <p><input checked="" type="checkbox"/> CARD ON FILE Visa ending in *3706.</p>

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**.



Event Details

Entry List

Register

Results

Admin Menu

JSA TEST REGATTA 3
Larchmont Yacht Club, Woodbine Avenue,
Larchmont, NY, United States

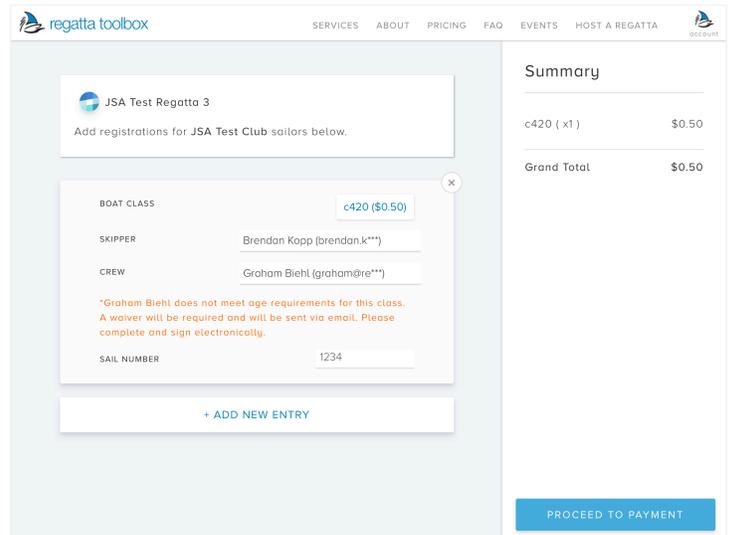
SELECT YOUR CLASS:

Instructors Optis c420

CONTINUE

Click here for Program Director registration

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.



JSA Test Regatta 3

Add registrations for JSA Test Club sailors below.

BOAT CLASS c420 (\$0.50)

SKIPPER Brendan Kopp (brendan.k**)

CREW Graham Biehl (graham@re**)

*Graham Biehl does not meet age requirements for this class. A waiver will be required and will be sent via email. Please complete and sign electronically.

SAIL NUMBER 1234

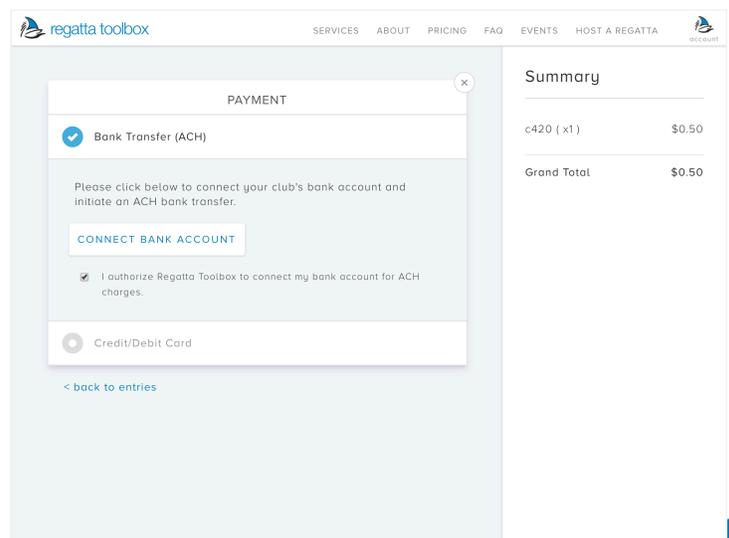
+ ADD NEW ENTRY

Summary

c420 (x1)	\$0.50
Grand Total	\$0.50

PROCEED TO PAYMENT

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.



PAYMENT

Bank Transfer (ACH)

Please click below to connect your club's bank account and initiate an ACH bank transfer.

CONNECT BANK ACCOUNT

I authorize Regatta Toolbox to connect my bank account for ACH charges.

Credit/Debit Card

< back to entries

Summary

c420 (x1)	\$0.50
Grand Total	\$0.50