Trackchat

USER GUIDE - CLUBS

Introduction

This User Guide will serve to explain Trackchat, taking you through joining and creating a club, to membership management and safeguarding, as well as the social media and communication features.

Contents

How to Join

Creating a Club

1. Go to https://trackchat.io and click 'sign up'.
2. Click 'Club', then select the appropriate plan for you.
3. Follow the steps and input the information, making sure to put the correct 'club type' in the dropdown. Please note, for the basic club pack, it is free with the exception of transaction fees (if you are managing memberships within the TC platform). This is why it will ask you to input card information, it will not, however charge you. This is also done as a security measure to stop spam accounts.
4. Input a password and be sure to make a note of it. You can always change this later if you ever forget it.
5. Once you have completed all the steps, you will get a welcome email. This will contain your clubs handle; this is a unique ID that is automatically created for each club.

Note: *If you are the individual that has created a club, you do not need to then 'join' that club, you join automatically when you create the club.*

Joining a Club

1. Go to the associated club's 'join' page following this URL format https://trackchat.io/@Handle/join
2. Scroll down, and click on the membership option you would like (these are set by the specific club).
3. Follow the steps, inputting the necessary information. Boxes with required information are marked.
4. Click 'Apply'. This will then send your membership request to the club, you will automatically go into a 'trial' status, from here the club can approve or deny and set your permissions.
5. You will receive a welcome email; this will contain your handle and your temporary password. You are advised to change this password upon logging in for the first time.

My Club

Members

Manage

This lets you search an individual member within your club, from here you can change their details, personal record, or their contact information. Useful if you need to look up or change information relating to a member of your club.

Contact

This is where you can access the contact information of anyone within your club. You can search by a specific role, such as membership secretary. Or you can go to the drop down for each group and search within those.

List

This is your standard and probably best used information point for all your club members. It will give you a list (categorised) of every member of your club and all the information from the above two sections. Here you can see their permissions, access their emergency information and medical record, as well as make any changes.

Status

This is very similar to 'List', except it will give you the current status of the individual, whether they are marked as active or inactive.

Groups

Manage

This is where you can create/edit new or current groups and create sessions associated with these groups. To do this, follow the below steps:

Creating a New Group

1. Select 'New Group' on the drop-down menu, it should be automatically selected as standard.
2. Fillin in the information below, making sure to fill in the required fields.
3. When you are happy, click 'add this group'.

Editing a Group

1. To edit a group, select that group from the drop down.
2. Change/edit the required field in the boxes below.
3. Click 'save', and the changes will be updated.

Creating Sessions

1. A 'Session' typically in Trackchat would be a training session and are linked to a group.
2. Find the group you want to create a session for in the drop-down menu.
3. Scroll to the bottom and click the + icon next to where is says 'session'.
4. Fil in the information and click save. When each group is selected, you will be able to see all the sessions created for that group.

Assign

This is where you can assign members to groups, to do this, we will follow the steps below:

1. Make sure your group or groups are already created. You should be able to see them on this page, listed below.
2. To select and individual you want to add to a group, go to the dropdown menu where it says 'find', and scroll down to find said individual.
3. Once the name if the individual you want is selected, click on the + icon next to the group you want to add them too. This will add them to that group.
4. You can double check this has worked as their name should then appear on tat page, under the specific group you ticked.
5. You can add one member to multiple groups at a time.

Contact

This allows you to send emails to specific groups within your club.

1. Select the who you would like the email to come from in the drop down menu.
2. On the groups below, select which group or groups you would like to email by clicking on the email icon on the left of each banner. You can email multiple groups at a time.
3. Once successfully clicked, the icon will turn green.
4. Now click 'compose email', a small window will open allowing you to compose your email.
5. Once you have finished composing your email, click 'send' and the email will be sent to all individuals in the selected groups.

List

This section displays a list of all the groups you have within your club, and each member assigned to each group. This gives you oversight on exactly how many groups you have, and how many users you have in each group.

Track & Trace

Track Direct

This section allows you to manually sign in/out of a session. This would typically be done by the coach.

1. To do this, select the group from the drop down, you can also search by the specific member, but searching by group is quicker and easier.
2. Now click the action icon, this will sign them in or out, depending on what the previous action was. There is a key that shows you what each variation of the icon means.

Track by Kiosk

This allows users to sign in and out by a localised device, or by themselves. It's like signing in at the doctors, the users just needs to follow the instructions on the screen. This will log them in to each session.

Once the user has finished the session, they just need to follow the same process to log out, the system knows whether they are logging in or out.

Trace Today

This view gives a coach or admin a real-time view of who has logged in or out of a session. This acts like a register, except you also have quick access to each users medical information and emergency contact information.

All you need to do is simply select the group, and it will show a live register of who is currently logged in, and when they log out.

Trace History

This lets you see the history of when a specific user has been to a session. This uses the log in/out feature to track each session they are in, and it logs it by date and month.

Analytics

Analytics allows you to see and track the data captured in the above Track & Trace section. You can see attendance across an individual, or as a whole, or across a number of different fields.

Reports

Renewals

In renewals, under reports, you can see all the individuals who are coming up for renewal within your club. Using the buttons on the right of each name, you have a number of different actions available to you:

Nudge: This will send an email reminder to the individual that their renewal is coming up.

Payment Link: This send them the payment link, all they need to do is click the link and it will allow them to pay their membership safely and securely.

End: This allows you to end a membership, this will terminate the auto renew, so they no longer get charged.

Add: Allows you to add a manual payment, this could be an extra charge.

Transactions

Transactions allows the viewer to see all of the current and past transactions made to your club, by your members. You can select by year and month.

Receipts

Receipts are very similar to transactions, in that it shows the transaction data to your club, by your members. However, the difference here is that Receipts is designed more for the treasurer, and depending on permissions, may only be viewable to select individuals.

The key difference is the level of detail, you get more information on each transaction, including the amount taken by Trackchat, and the amount taken by stripe.

Trials (New Members)

The trials option under reports, allows for a read-only overview of new memberships and members currently on trial. From this, you do have the option to edit their information or send out a payment link. However, this is predominantly a read-only, informative view.

Workflow

Workflow in Trackchat is where you will find your tickets (action items) as an admin, or member of staff with admin authority. For example, new member tickets will go through this process.

Upon, opening the workflow screen, you will each ticket, marked by a number. The ticket will say what it is for, for example if it's a 'new member' ticket. You will also notice a colour coding system on the left-hand side of each ticket. Green = In Process (There are actions for you to do), and Blue = Completed.

To open up a ticket, click on the icon to the right of the ticket, and it will open. To complete the ticket, simply follow the steps, filling out the drop-down menus. The process and steps are explained on the screen.

Configure

This allows you to make changes to any of your club's key information, such as sport, financial year, age range and even name. Simply follow the instructions, making sure the boxes are filled.

Dashboard

This is an overview page of different graphs and charts reflecting your club. You can see information such as the ages of all your athletes, attendance records, finances and income.

This is helpful for admin to be able to have a quick overview of what's going on within your club, without having to drill down further into the different sections.

Magazines & Posting

In Trackchat, magazines allow you to collate and share a collection of posts to a group or to the whole club. For example, this could be in the form of a weekly newsletter, which then then be published on the website, or sent to members individually.

Creating a Magazine

Creating magazine is simple:

1. Click on the pen icon on the top right of the screen, then click the magazine feature.
2. This will open up a small editing window below. Fill in the information, you can select the audience, change the styling or add a cover photo.
3. This will create your magazine, but you still need to add content to it. This will be outlined below.

Adding Content to a Magazine

You can add content to a magazine one of two ways, you can either go through your clubs' posts, click edit, then add it to the magazine of choice.

Or, you can add a post to a magazine when you create that posts, by choosing the 'magazine button in the post editor screen and selecting which magazine you want it added too.

Posting

Creating a Post

In Trackchat, you can post, just like you can on many social media platforms.

1. Go to the pen icon on the top right hand side of the screen.
2. Here you will see a number of different options, including article, quip, card and photo. Each of these represent a different media format you can post.
3. To create a post, whether it be a card, article of photo, the process is the same for all. Click on the option you want to select, and an editor screen will open below.
4. Here you can build your post, the options will be different depending on what post type you selected.
5. Note how you can post to different groups. This could be solely within your club, within groups or to wider audiences.
6. Once you have built out your post, click save. Your media will now be posted to the 'Feed', where you and whichever audience you chose, will be able to see it.