

CROQUET NEW ZEALAND DATABASE MANUAL FOR CLUBS

Croquet NZ
VERSION 3: UPDATED JANUARY 2020

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Overview

During 2018, Croquet New Zealand (CNZ) spent considerable time and effort in updating the members database after taking over the hosting of the database from Lateral Solutions.

The changes within the new database were things identified by various members about what the old database could have either done better or should have been able to do. These changes include, a password reset function, player search function for adding existing people to your club and allowing online levy submissions.

CNZ is excited about these changes as they are expected to make our volunteers life much easier and provide a more accurate database of our members.

Below is the menu a club secretary will see when they log in and the functions of each of the headings. As different roles have different permissions, each role will see a different combination of the headings below.



My Details: Everyone will see this when they login. This is your individual data.

Directory: This function now enables you to search for people who hold roles within CNZ, Associations or clubs.

Members: This shows the members who are currently part of your club and where you can add new members. There is also a filter function that enables you to see past members.

Clubs: This tab shows you what clubs you have access to. By editing your club, you can change club details, see who has roles within the club as well as being an alternative way to see your club's membership.

Handicaps: Shows a summary of your clubs' membership with their respective handicaps.

Qualifications: Similar to the handicap tab, this shows a summary of qualifications held by your club's membership.

Returns: This is where you now file your club levy return!

Accessing the Database

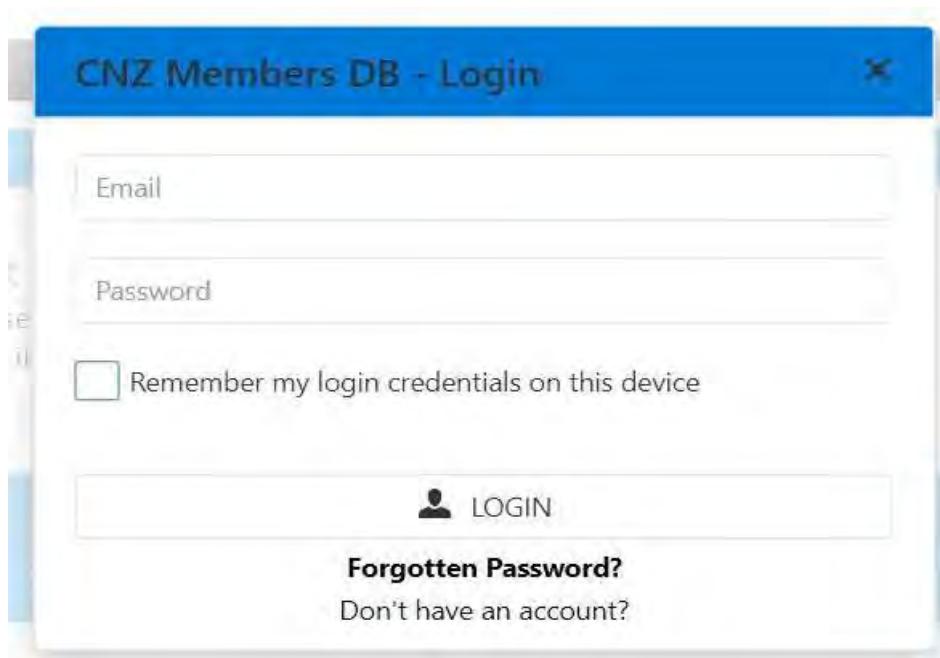
Any member who has a valid email address can have access to the Croquet New Zealand Database. What people see when they log in will be determined by whether they hold any roles within their club or association as each role has different access rights.

To access the database, go to the website: <https://members.croquet.org.nz/>

Once there, the below page will appear. Click the login button on the top right.



When you click "login", you will see the following pop-up:



If you have a password, simply enter your email address and password and click login. You can now remember your login credentials, to do this ensure the check box is ticked before you log in.

If someone needs / wants access to the database and they do not have a password, their Club / Association secretary can give them access. They do this by simply editing a member's details ensuring they have an email address as well as adding a temporary password:

The screenshot shows a member details edit page. At the top, there is a red box labeled 'Email' with a text input field. Below it is a blue header bar with 'Login details' and 'Edit' buttons. Underneath the header, there are two more red boxes: one for 'Password' and one for 'Password again', both with text input fields. At the bottom of the page is a green button labeled 'Save member'.

Once entered, scroll to the bottom of the page and save the member by clicking on the green save button.

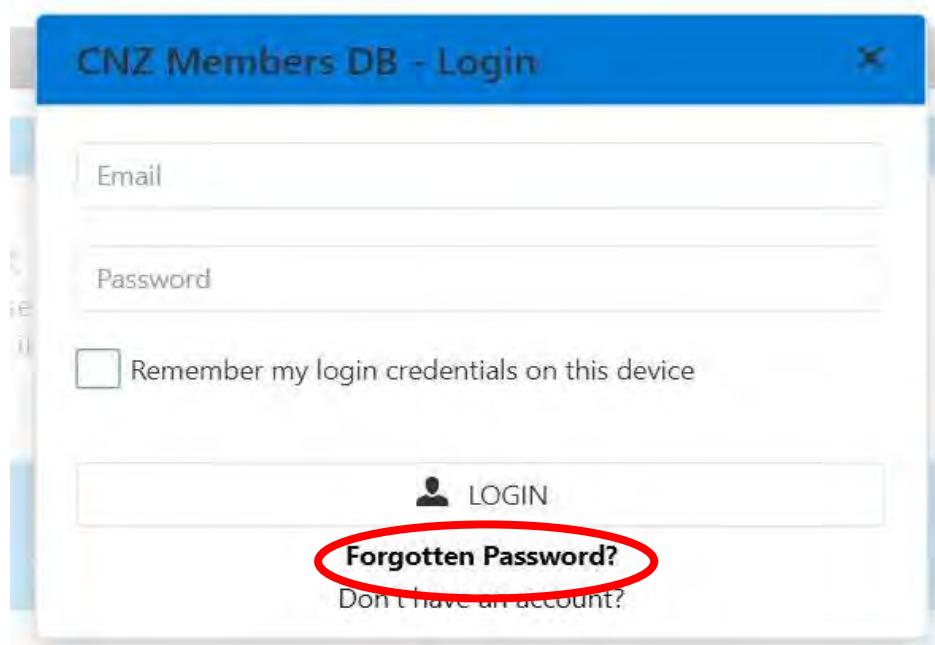
The member will then be able to change their password under "my details".

Resetting Your Password

From time to time, and for a variety of reasons, people can forget their password. Therefore, we endeavour to make resetting the password as simple and stress free as possible. There are two (2) ways that a password can be reset.

Option 1: Member resets their own password

The first option a member should try when they have forgotten their password is to try and reset it themselves. This can be done on the home screen. Once they have clicked login, under where they would normally enter their login credentials is a forgot password button.



This will take the member to a page where you will enter your email address (ensuring this is the email they use to log in with) and it will send a link to reset your password.

CNZ Members DB - Login X

Reset your Password

We will send you an email with a link to change your password.

[Return to Login](#)

If you do not receive an email within 30 minutes, check your spam folder. If there is still no email, please contact croquet@croquet.org.nz.

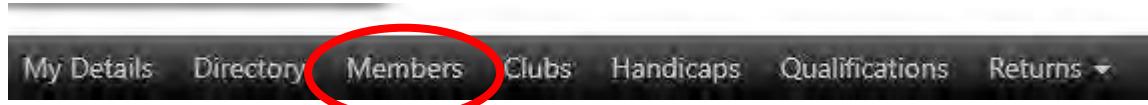
Option 2: Secretary Changes the password

As an alternative option, the club secretary is able to change the members password as required. They can do this by editing the members details similar to giving a new member access to the database as in the previous section.

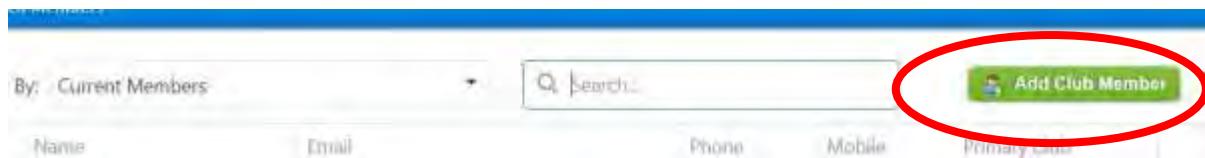
If both of these options do not work, please contact croquet@croquet.org.nz for assistance.

Adding a Member

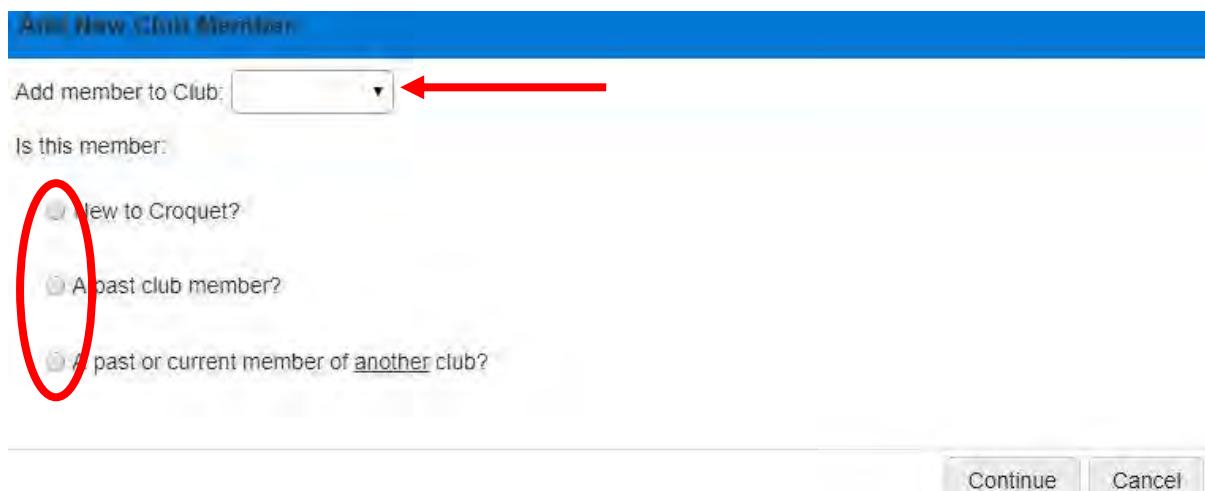
To add a new member, click on “members” on the navigation menu.



Once in this section, click on the green “Add Club Member” button.



On the next page, you will need to select your club and what type of member they are: New to Croquet, Past Club Member or a Past or Current Member of another Club.



New to Croquet:

If you select new to croquet, it will take you to the page to fill in the new members details similar to the old system. To be able to save a new member, you will need to include their first name, surname, gender and club (the club should auto fill from the previous step). In addition to this mandatory information, it would be beneficial to CNZ for reporting purposes to include their date of birth. The levy type is now automatically generated, if the new to croquet member is a youth member, you will need to include their birth date to ensure their levy class is 0-18yrs.

Add new member

| | | | | | |
|---|-------------|--------|--------|------------------|--|
| Name: | First | Middle | FAMILY | Gender: | <input checked="" type="radio"/> Male <input type="radio"/> Female |
| Address: | | | | Date of Birth: | |
| Country: | New Zealand | | | Membership date: | 14/09/2018 |
| Home Phone: | | | | Deceased: | |
| Mobile Phone: | | | | CNZ Life Member: | |
| Non-Playing Member: | | | | | |
| Levy type for 2018/19 season: New to Croquet | | | | | |

Once you have entered all the necessary information, you will need to scroll to the bottom of the screen and click on the green save button. If you haven't completed all of the required fields, an error message will pop up.



Past Club Member:

If you select a past club member, select your club from the drop-down option and tick add a past member. After you have done this, a new drop-down menu for past members of your club will appear. Go through this list to find the member you wish to add.

| | | |
|--|-----------------------|---|
| Add member to Club: | Akaroa | ← |
| Is this member: | | |
| <input type="radio"/> New to Croquet? | | |
| <input checked="" type="radio"/> A past member of the Akaroa Club? | Select Past Member .. | → |

Once you have selected the member you are trying to add back to your club, click continue.

A past or current member of another club:

If you select a past or current member of another club, please refer to [transferring members](#) for more details.

Removing a Member

There are two ways to remove members from your club.

Option 1:

Under the “members” tab, click the blue pencil on the left-hand side of the screen to edit the member you wish to remove. Once in this screen, you can scroll down and remove your club by clicking the red delete button as you have previously done in the old database.



It is important to remember to save the member after doing this by clicking the save member button at the bottom right of the screen.



Option 2:

Click on “club” tab on the navigation menu.



This will take you through to a page with a list of your clubs, click on the blue pencil on the left to edit your club. This page will show you three sections, club information, club roles and your members.



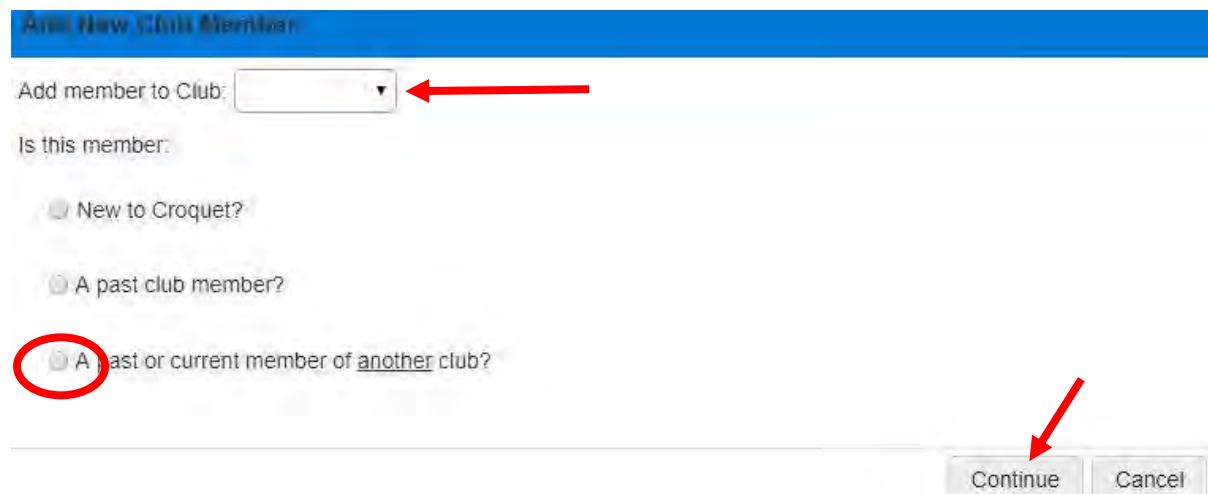
Under the members section, there will be two options to the left of the members names (as seen to the left). A pencil, which will allow you to edit that member or a bin, which will allow you to remove a member from your club.

To remove a member, click on the bin.

Transferring a Member

The first step when transferring a member, whether they are a current or past member, from another club is exactly the same as adding a new member.

However, when you get to the screen shown below, select “a past or current member of another club” and click continue.



Add New Club Member

Add member to Club:

Is this member:

New to Croquet?

A past club member?

A past or current member of another club?

Continue Cancel

This will take you through to the following screen:

approved. If you have any questions about this process or if you would like to follow up on the status of a transfer, please contact the CNZ Office: (04) 916 0258.

 Step 2: Select member's current or previous club: Step 3: Select CNZ Member: No members found that match criteria (note you need to provide a member's name and club) Add selected member to club: Whakatane Club (as a current member) Step 4: Submit request for selected CNZ Member to be added to Club" data-bbox="154 582 660 754"/>

Step 1: Enter past or current CNZ member's name:

Step 2: Select member's current or previous club:

Step 3: Select CNZ Member

No members found that match criteria
(note you need to provide a member's name and club)

Add selected member to club: Whakatane Club
(as a current member)

Step 4: Submit request for selected CNZ Member to be added to Club

Once you have entered a member's name (this can be first, last or both) and selected their previous club, any members that fit that description will appear automatically.

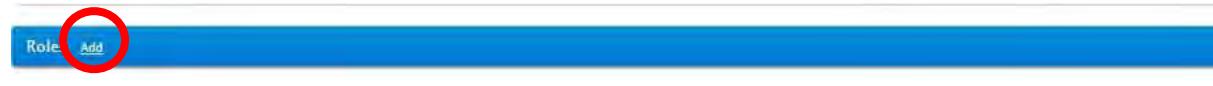
NB: you must enter both the name (first, last or both) and club for a member to appear.

Once you select a member, click the green submit button and a request will be sent to the Executive Director to transfer that member.

NB: National Office will attempt to process any transfer requests within 24-48 hours.

Adding a Role

Adding a role is exactly the same as with the previous database. Once you click into edit a member, scroll down to the Roles section, click add role and select from the drop-down menu.



Club Roles

| Role | Add |
|-------------|--|
| President | Once you have selected the role, you will need to select the club and add a date that the role was obtained to enable the member to have that roles permissions. |
| Secretary | If you want the member to have access for a limited time, include an expiry date at which point the member will no longer have that roles permissions available to them. |
| Treasurer | |
| Captain | |
| Referee | |
| Handicapper | |
| Coach | |

President Once you have selected the role, you will need to select the club and add a date that the role was obtained to enable the member to have that roles permissions.

Secretary If you want the member to have access for a limited time, include an expiry date at which point the member will no longer have that roles permissions available to them.

Treasurer

Captain

Referee

Handicapper

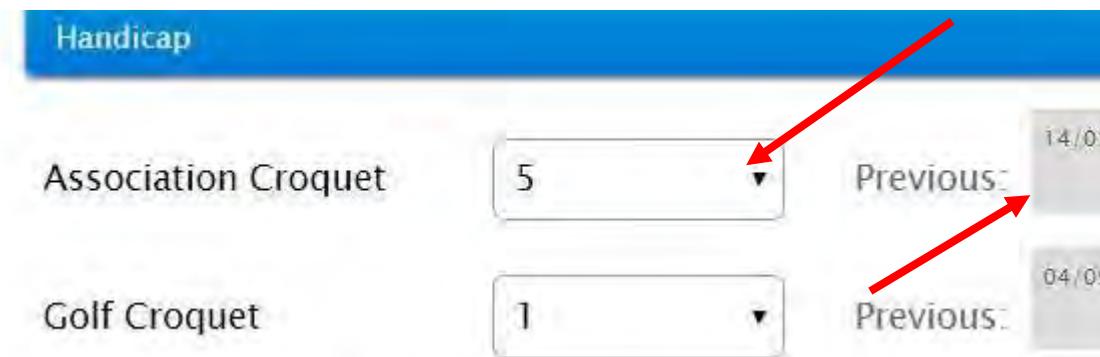
Coach



Changing a Handicap

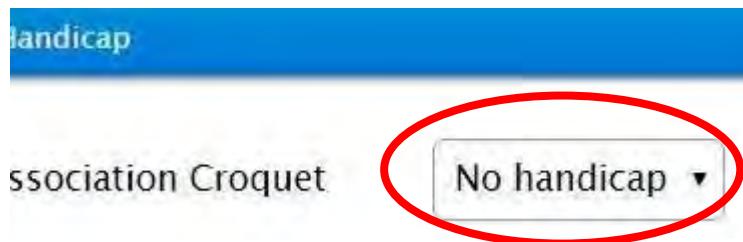
Changing a member's handicap has not changed. When a member's handicap changes (either positively or negatively), find the member within your club and edit their record.

Once you are in the member's profile, simply choose the relevant drop-down menu (AC or GC) and select the new handicap.



It is important to keep a member's handicap up to date as the database maintains a record of all previous handicaps and date stamps when they were updated. Giving a clear picture of a member's improvement.

If a member does not have a handicap, please ensure you select "no handicap" as illustrated below.



Once you have done this, remember to save the members profile by clicking the green save button at the bottom of the page.

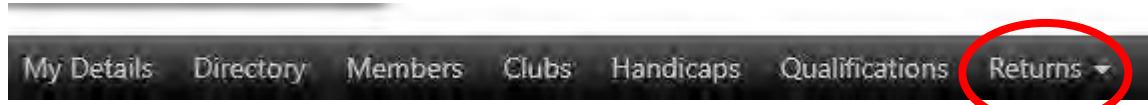
Levy Returns

To improve data accuracy and hopefully make our volunteers jobs a little bit easier, the levy returns are now completed through the database. To make the levy return as simple as possible, we recommend that you update the database regularly.

Below are the steps required to complete the levy return.

Step 1:

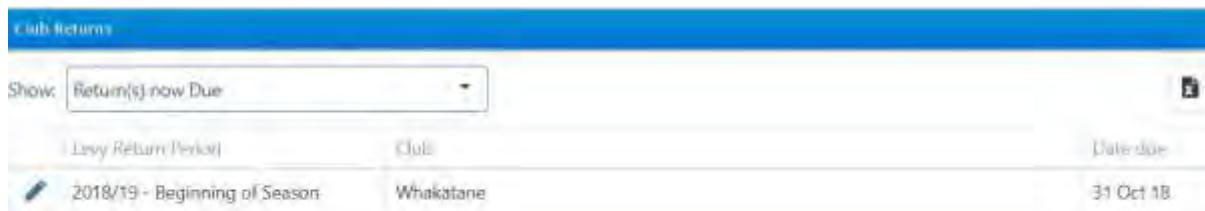
Select “Returns” on the navigation menu.



Once you click on this, a drop-down menu will appear. Click on “File Club Return”.

Step 2:

The “File Club Return” option will take you to the below page.



This page will show you what returns are currently due, as well as the due date on the righthand side of the screen.

You can review past returns by selecting this option in the drop-down menu for “show”.

When you are ready to submit the return, click on the blue pencil.

Step 3:

After selecting to edit the current return, the next page will have three sections.

1. Return summary

Levy Return Summary

| CNZ Levy Class | Levy Rate | # of Players | Levies |
|----------------|-----------|--------------|---------------|
| Full Member | @ 46.00 | 64 | 2,944.00 |
| Totals | | 0 | \$0.00 |

Date Due: 31-Oct-2018

Submit Club Levy Return

This summary is automatically calculated based on your club's membership.

2. Role summary

Club Roles

President

Secretary

Treasurer

Captain

Referee

Handicapper

Coach

This summary will provide you an opportunity to review who currently holds the specified roles for your club within the database.

Having this review will enable you to manage who is being able to see specific information by adding people who are missing or removing people who no longer hold that role.

3. Membership list

Club Members included in this Return

Name

Levy Class

All members who are included in your return will be listed in this third section. As well as their name, it will also include the levy type.

New to Croquet: Automatically assigned to new members who were added to the database during the current levy period. This will be automatically updating in the system on 1 July of the year following the levy return the member was included as a New to Croquet member.

Full Member: Once the original return is filed for a new member, their details will be updated to full membership.

U19 Member: To have a member with the U19 Levy Class you will need to enter their birth date. The birth date automatically calculates if a member is entitled to the youth rate. To qualify for this levy type, the member must be under the age of 19 as at 1 July in season of that levy return (i.e. 18 or younger as at 1 July 2019 for the 2019-20 levy return).

If a member is not on the list, you will need to go back to the members page and add them before submitting the return. See [adding a member](#) for these details.

If a member is on the list and is no longer a member of the club, you will need to remove them before submitting the return. See [removing a member](#) for these details.

Step 4:

Once you are happy that the database is correct, submit the return by clicking “submit club levy return” button under the Levy Return summary.

[Levy Return Summary](#)

| CNZ Levy Class | Levy Rate | # of Players | Levies |
|----------------|-----------|--------------|---------------|
| Full Member | @ 46.00 | 64 | 2,944.00 |
| Totals | | 0 | \$0.00 |

Date Due

31-Oct-2018

[Submit Club Levy Return](#)

If you believe the return is wrong for any reason and you are unsure how to correct it, please call the office on (04) 916 0258.

NB: Once the Association submit their return, you will no longer be able to cancel your club return.

NB: You will still be asked to complete a form at the end of the season to collect non-member participation and membership age bands to help with CNZ reporting.

Frequently asked Questions

Q: Who can have access to the database?

A: Anyone can have access to the database. What people can access in the database will depend on their “permissions” as defined by the roles they hold.

Q: How do I get access to the database?

A: Your club secretary can create log in credentials for their club’s members.

Q: I am not sure if a player is returning this season, if they are included in the beginning of season levy return, can I remove them later if they don’t?

A: No, once the levy return is completed those members are confirmed. If your club is unsure if a member is returning, we recommend removing that player and adding them back in if they return (they will then be picked up in the end of season levy return).

Q: We don’t have any new members for the end of season return, do we need to do anything?

A: Simply put, yes. But your job is really simple! Go to the levy return, ensure it is showing no new members and click the “submit club levy return” button.

Q: When does someone’s levy type change.

A: Levy types that need to be amended will automatically update on 1 July.