

Squash Australia – Saturday Forum



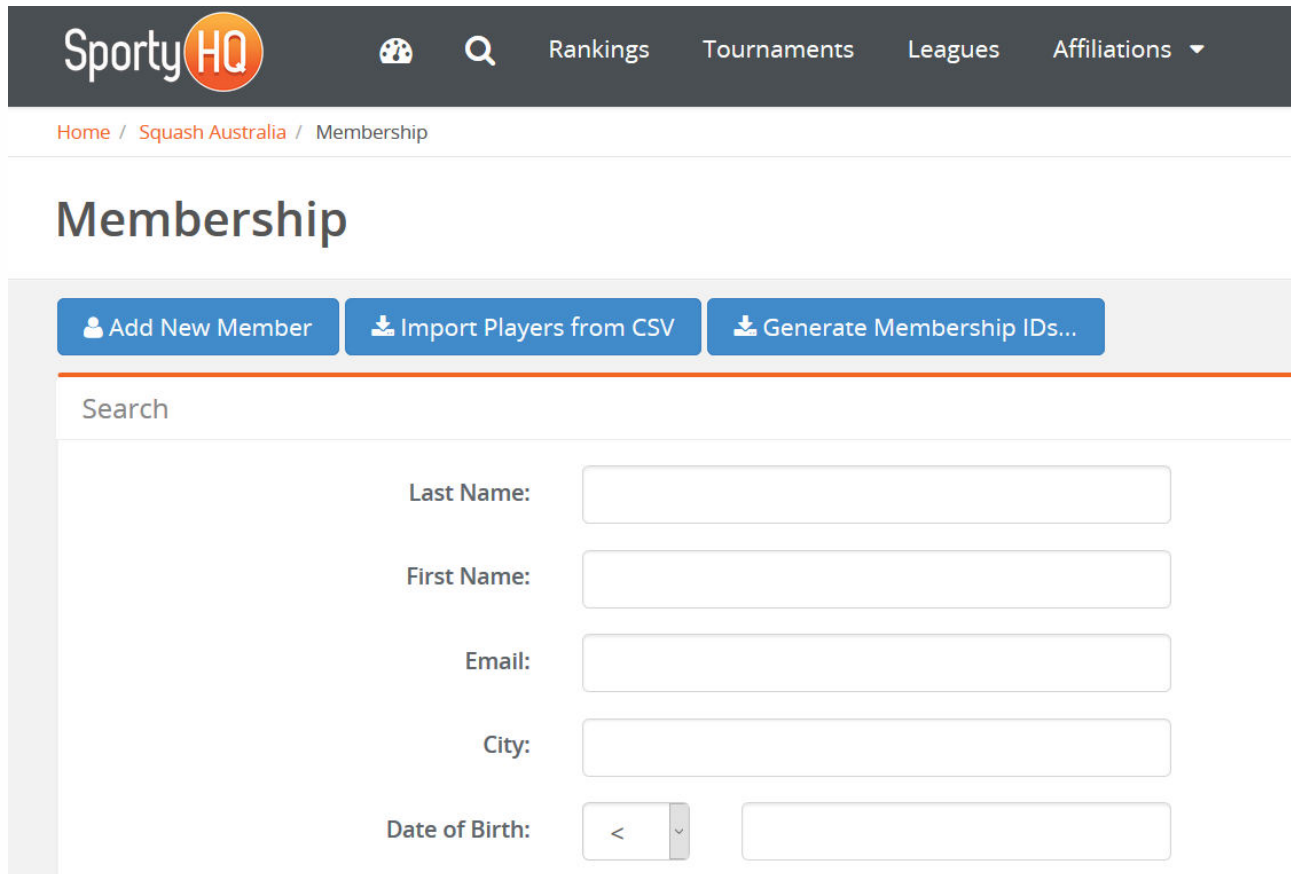
CRM Introduction

CRM Introduction - Index

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1. What is Squash Australia's CRM

Squash Australia has introduced a new CRM system to help identify, collate and report more accurate participation and membership numbers of squash players in the country. It is important to have accurate data for affiliations and reporting for the ASC and AIS.



The screenshot shows the 'SportyHQ' website interface for Squash Australia's Membership page. The top navigation bar includes links for Home, Squash Australia, and Membership. Below the navigation bar, the 'Membership' section features three buttons: 'Add New Member', 'Import Players from CSV', and 'Generate Membership IDs...'. A search bar is located below the buttons. The main form area contains input fields for 'Last Name', 'First Name', 'Email', and 'City'. The 'Date of Birth' field is a date picker with a calendar icon and a dropdown arrow.

SportyHQ

Home / Squash Australia / Membership

Membership

[Add New Member](#) [Import Players from CSV](#) [Generate Membership IDs...](#)

Search

Last Name:

First Name:

Email:

City:

Date of Birth:

The system allows clubs and States to keep up to date information on members and has the ability to track referees, coaches and players.

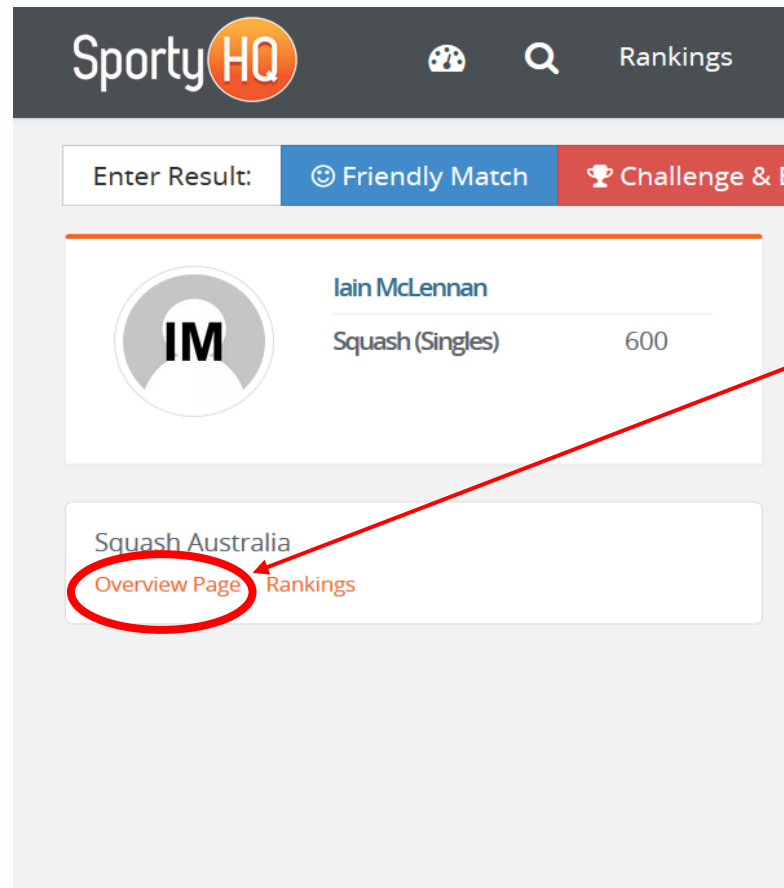
2. Information stored on CRM

The following information is capable of being stored on Squash Australia's new CRM:

- Name
- Gender
- Date of Birth
- Email
- Home and Mobile Phone Number
- Address
- City & State or Territory
- Membership Number
- Membership Expiry
- Club
- Role (Player, Coach, Referee)
- Type (Squash, Racquetball)
- Matrix ID and Rating
- National Grading Level
- Referee Level
- Coach Education Level
- ASADA Level
- Child Protection Card
- First Aid Certificate
- Integrity Level
- Participation Programmes (Oz Squash etc)
- School (if applicable)
- University (if applicable)
- Membership Level

3. Obtain a SportyHQ administration account

- To obtain a SportyHQ administration account please contact Iain at membership@squash.org.au
- Head to sportyhq.com and login.

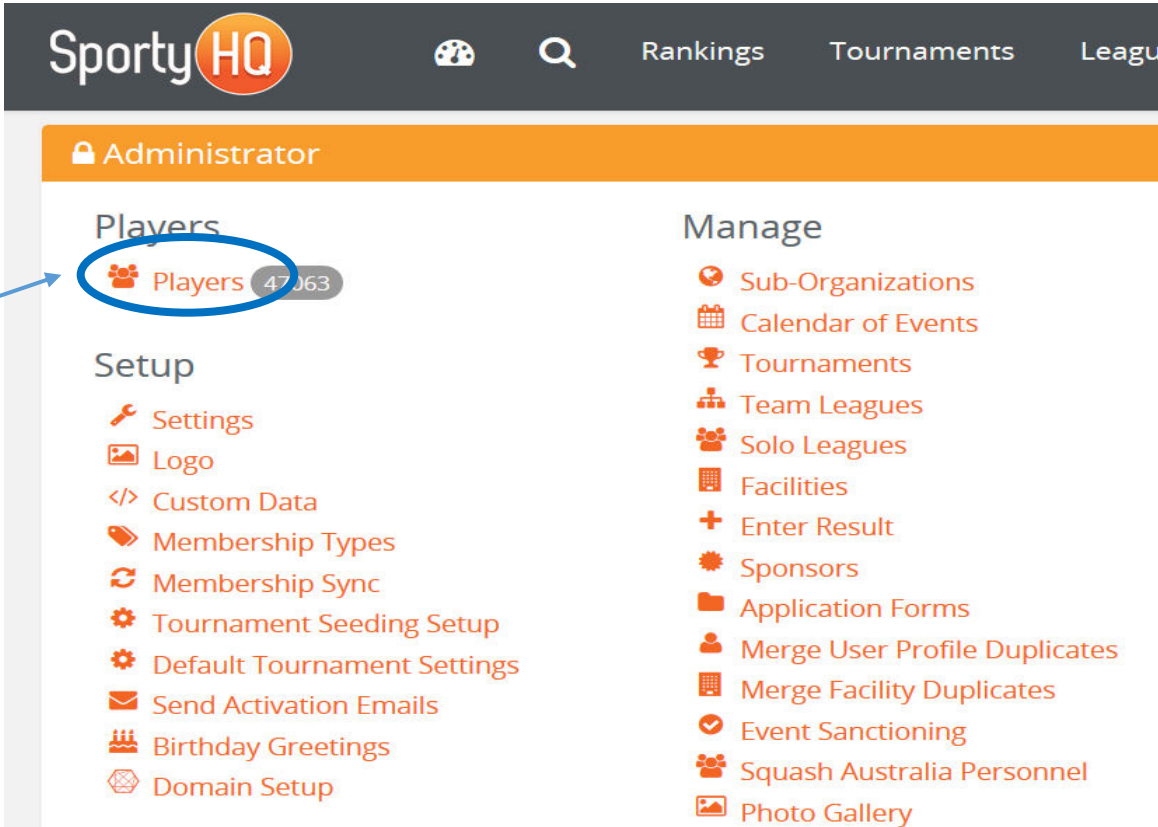


On the
SportyHQ
Home
Page
select
Overview
Page

4. Where is the CRM?

The CRM is located under the Administrator Box – Players.




On the Admin box select Players to access CRM



The screenshot displays the SportyHQ Administrator interface. At the top, there is a dark navigation bar with the SportyHQ logo and links for Rankings, Tournaments, and Leagues. Below this is an orange 'Administrator' header. The main content area is divided into two columns. The left column contains a 'Players' section with a blue circle around the 'Players' link (which has a count of 47,063) and a 'Setup' section with various configuration options. The right column contains a 'Manage' section with various management tasks. A blue arrow points from the text box on the left to the circled 'Players' link.

- Players** (47,063)
- Setup**
 - Settings
 - Logo
 - Custom Data
 - Membership Types
 - Membership Sync
 - Tournament Seeding Setup
 - Default Tournament Settings
 - Send Activation Emails
 - Birthday Greetings
 - Domain Setup
- Manage**
 - Sub-Organizations
 - Calendar of Events
 - Tournaments
 - Team Leagues
 - Solo Leagues
 - Facilities
 - Enter Result
 - Sponsors
 - Application Forms
 - Merge User Profile Duplicates
 - Merge Facility Duplicates
 - Event Sanctioning
 - Squash Australia Personnel
 - Photo Gallery

5. Search for a Player on the CRM

[Rankings](#)[Tournaments](#)[Leagues](#)[Affiliations](#) ▾

[Home](#) / [Squash Australia](#) / [Membership](#)

Membership

[Add New Member](#)[Import Players from CSV](#)[Generate Membership IDs...](#)

Search

Last Name:

First Name:

Email:

City:

Date of Birth:

< ▾

Format:

On screen ▾



On screen

Excel (.xlsx)

CSV (Excel)

Search

6. Search for Multiple Players on the CRM

SportyHQ   [Rankings](#) [Tournaments](#) [Leagues](#) [A](#)


Participation Programmes:

- ☐ Oz Squash
- ☐ Pop-Up Squash
- ☐ Hits & Giggles
- ☐ Cardio Squash
- ☐ Social Squash
- ☐ Outdoor Squash

Format:

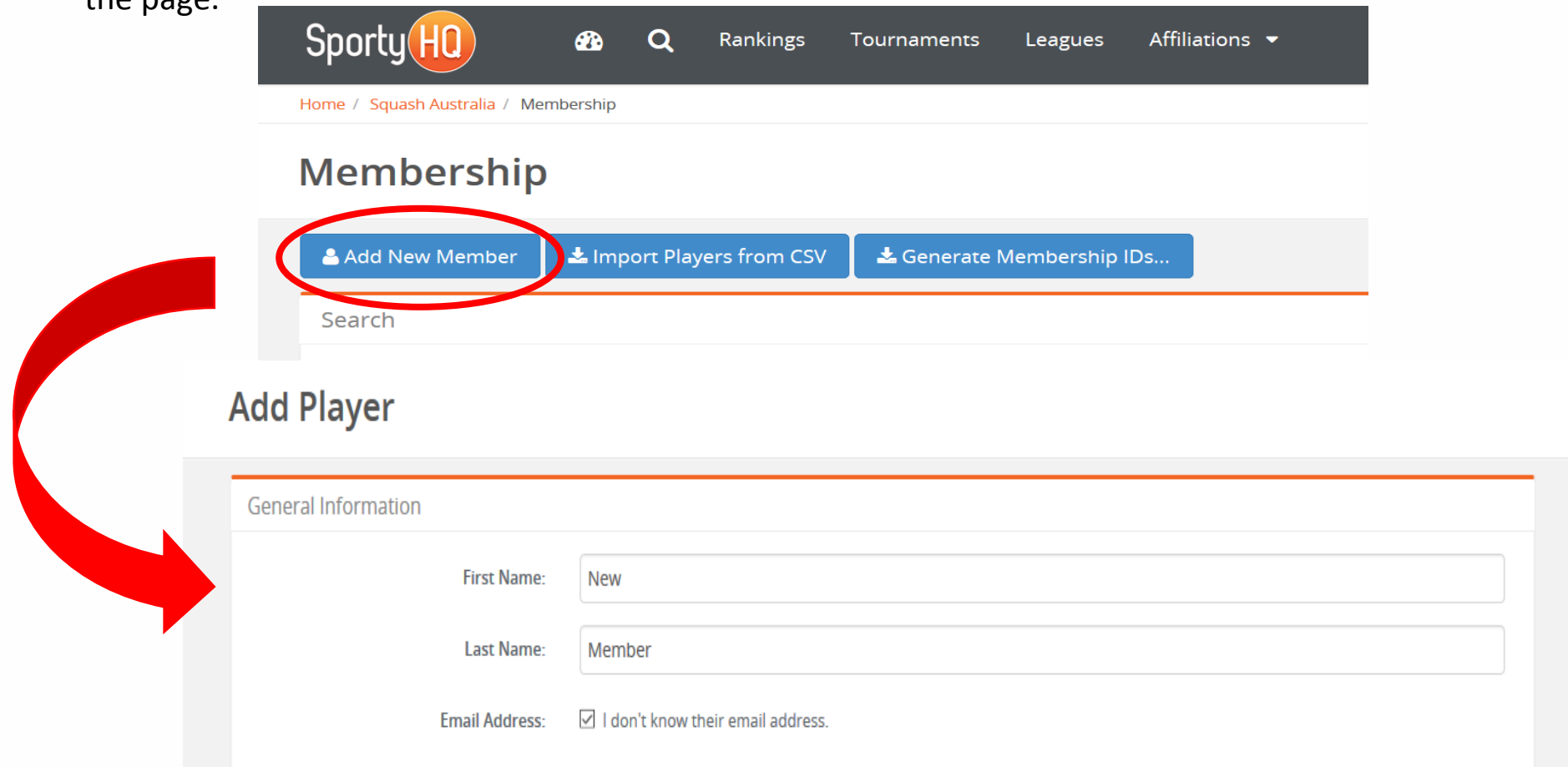
Format:

- On screen
- Excel (.xlsx)
- CSV (Excel)



7. Add an Individual on the CRM

You can add a new person on the CRM by clicking on the blue tab “Add New Member” at the top of the page.



The screenshot displays the SportyHQ website interface. At the top, a dark navigation bar contains the SportyHQ logo and links for Rankings, Tournaments, Leagues, and Affiliations. Below this, a breadcrumb trail shows 'Home / Squash Australia / Membership'. The main heading is 'Membership'. A horizontal bar contains three buttons: 'Add New Member' (circled in red), 'Import Players from CSV', and 'Generate Membership IDs...'. A red arrow originates from the 'Add New Member' button and points to the 'Add Player' form below. The form has a 'Search' input field and a section titled 'General Information' with fields for 'First Name' (containing 'New'), 'Last Name' (containing 'Member'), and 'Email Address' (with a checked checkbox for 'I don't know their email address').

Membership

[Add New Member](#) [Import Players from CSV](#) [Generate Membership IDs...](#)

Search

Add Player

General Information

First Name:

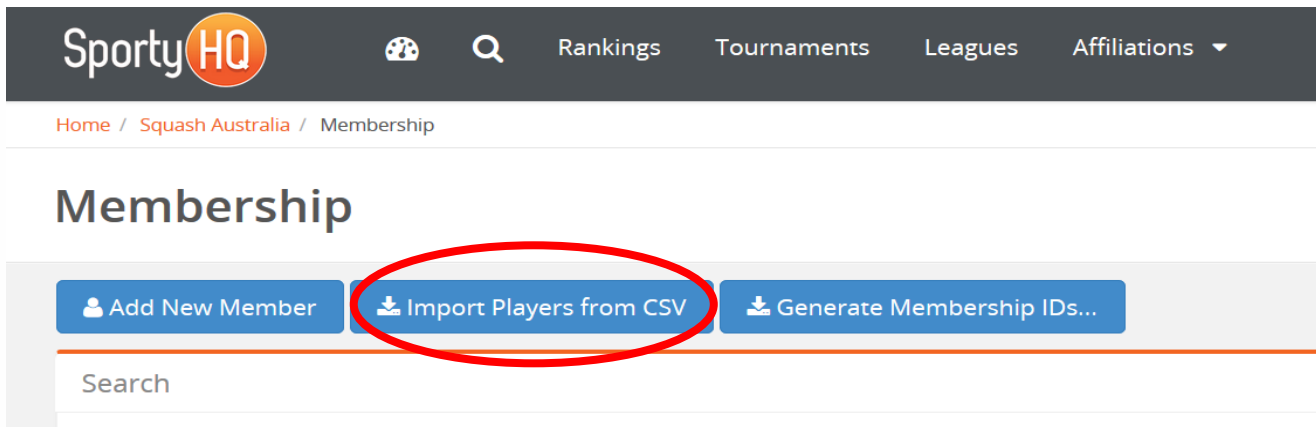
Last Name:

Email Address: ☒ I don't know their email address.

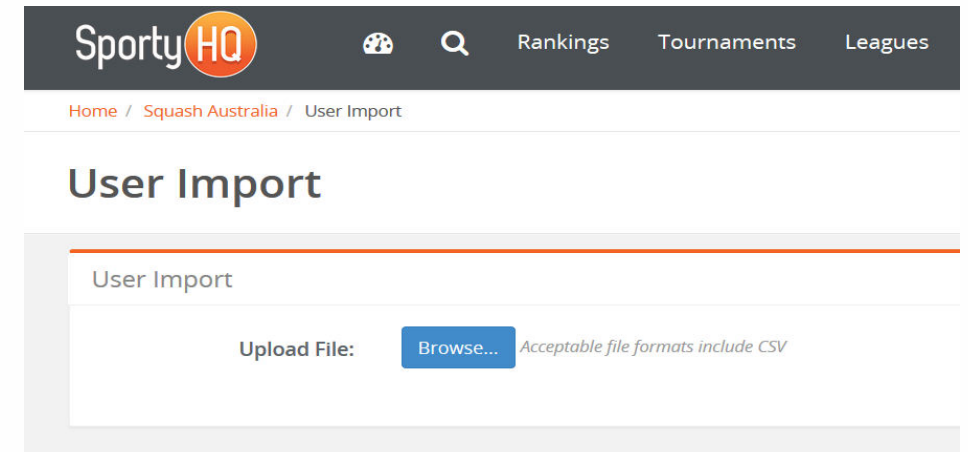
8. Add Multiple Players on the CRM

You can import multiple players on the CRM by adding information to a CSV template file. Click on Import Players from CSV to download the file.

Step 1



Step 2






Please contact me at membership@squash.org.au to obtain a blank CSV template

8. Add Multiple Players on the CRM cont.

An example of a CSV template file

	A	B	C	D	E	F	G	H	I	J	K
1	Membership Number	First Name	Middle Name	Last Name	Gender	Email	Home Phone	Work Phone	Cell Phone	Date of Birth	
2	10121	John	Kevin	Smith	Male	jks@gmail.com	07 3214 2422	07 3323 2152	0423 315 455	14/02/1968	
3											
4											
5											
6											

Sporty HQ    Rankings Bookings ▾ Tournaments Leagues Affiliations ▾

Match Fields

The following columns must exist:

- First Name
- Last Name
- Date of Birth
- Membership ID

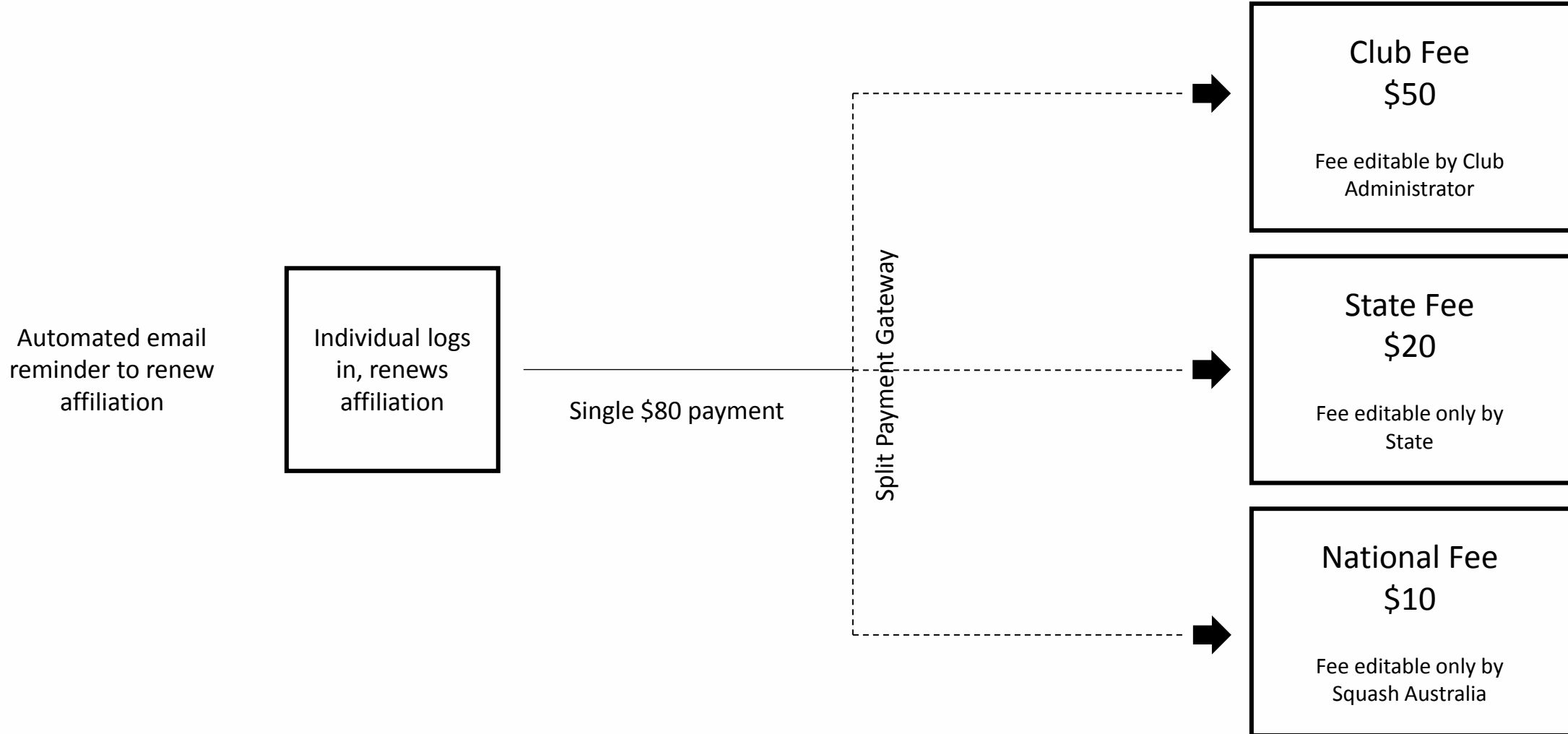
Whenever possible, we try to match existing users in the system. We use this process to try and identify someone:

1. See if we can match the membership number you provide with an existing entry in our system.
2. See if we can match the first and last name and date of birth with someone in our database.

If all of the above fail to match, we'll assume that the person is a new entrant.

Column Name	Field Name	Sample Data 1
Membership Number	--Skip--	10121
First Name	--Skip--	John
Middle Name	--Skip--	Kevin
Last Name	--Skip--	Smith
Gender	--Skip--	Male
Email	--Skip--	jks@gmail.com
Home Phone	--Skip--	07 3214 2422
Work Phone	--Skip--	07 3323 2152
Cell Phone	--Skip--	0423 315 455

9. Affiliation Payment Gateway - Individuals



10. Affiliation Payment Gateway - Clubs

