



**BC SOCCER**

# CRM User Guide - Registration Data Submission

October 2015

## OVERVIEW

This document is designed to assist BC Soccer Youth District and Adult League members in submitting their organization's player and team official registration data using BC Soccer's Customer Relationship Management (CRM) system. The wording has been chosen to reflect terms as defined by [BC Soccer's Rules & Regulations](#) and as they relate to registration practices.

Please be assured that BC Soccer's CRM is a private and secure system. Member organizations can only view their own player and/or team official data while BC Soccer can view all data that is uploaded to the system.

## REGISTRATION TEMPLATES

BC Soccer provides two registration templates:

1. For Player Registration submission:
  - template\_bc\_soccer\_player\_registration
2. For Team Official Registration submission:
  - template\_bc\_soccer\_team\_official\_registration

## PLAYER REGISTRATION TEMPLATE – ACCEPTABLE REGISTRATION TEMPLATE FORMATS

The Headers of the Player Registration Template are:

Player ID	District/League	Club	Team Name	TEAM ID	FIRST NAME	MIDDLE NAME (optional)	LAST NAME	BIRTH DATE	AGE LEVEL/CATEGORY	GENDER (M/F)	HOME PHONE	ADDRESS	POSTAL CODE	CITY	PROVINCE	EMAIL
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- DO NOT change the name of these headers
- DO NOT remove any column
- DO NOT change the order of the columns

The acceptable format for data in each column/header is as follows. ONLY the formats listed below ARE ACCEPTABLE.

Header Name	Acceptable Formats
Player ID	Any combination of numbers, letters (including underscore and hyphen symbols) Examples: 20150918, 2002_BCSA_001, BCSA-1983-04529, BCSA2790
District/League	All upper and lower case letters (including spaces as needed) No acronyms please.
Club	All upper and lower case letters (including spaces as needed) No acronyms please.
Team Name	All upper and lower case letters (including spaces as needed)
Team ID	Any combination of numbers, letters (including underscore and hyphen symbols) Examples: U17Lightning, BombersFC, U14 Metro Girls, Metro FC

FIRST NAME	All upper and lower case letters (including spaces, periods and hyphens as needed)
MIDDLE NAME (optional)	All upper and lower case letters (including spaces, periods and hyphens as needed)
LAST NAME	All upper and lower case letters (including spaces, periods and hyphens as needed)
BIRTH DATE	NOTE: ALL birth dates must be in ONLY ONE of the following formats <ul style="list-style-type: none"> <li>• YYYY/MM/DD</li> <li>• MM/DD/YYYY</li> <li>• MMM DD, YYYY</li> <li>• YYYY/DD/MM</li> <li>• DD/MM/YYYY</li> <li>• DD-MM-YYYY</li> <li>• Alpha Date (27-Sep-14)</li> </ul>
AGE LEVEL/CATEGORY	<p>YOUTH AGE LEVELS:</p> <ul style="list-style-type: none"> <li>• U3, U4, U5, U6</li> <li>• Under 3, Under 4, Under 5, Under 6</li> <li>• Under 03, Under 04, Under 05, Under 06</li> <li>• U03, U04, U05, U06</li> <li>• u3, u4, u5, u6</li> <li>• under 3, under 4, under 5, under 6</li> <li>• under 03, under 04, under 05, under 06</li> <li>• u03, u04, u05, u06</li> <li>• U7, Under 7, U07, u7, under 7, u07, Under 07, under 07</li> <li>• U8, Under 8, U08, u8, under 8, u08, Under 08, under 08</li> <li>• U9, Under 9, U09, u9, under 9, u09, Under 09, under 09</li> <li>• U10, Under 10, u10, under 10</li> <li>• U11, Under 11, u11, under 11</li> <li>• U12, Under 12, u12, under 12</li> <li>• U13, Under 13, u13, under 13</li> <li>• U14, Under 14, u14, under 14</li> <li>• U15, Under 15, u15, under 15</li> <li>• U16, Under 16, u16, under 16</li> <li>• U17, Under 17, u17, under 17</li> <li>• U18, Under 18, u18, under 18</li> </ul> <p>ADULT LEAGUE CATEGORIES:</p> <ul style="list-style-type: none"> <li>• A, a,</li> <li>• B, b, Under 21, under 21, U21, u21</li> <li>• C, c</li> <li>• SEC, sec, S, s, Spring, spring</li> <li>• M, m, masters, master, Masters, Master, Classics, classics, Over 30s, Over 35s, 35+, 30+</li> <li>• O, o, O40, o40, 40, Over 40s, 45+, 50+, 55+</li> </ul>
GENDER (M/F)	M, m F, f
HOME PHONE	All numbers including hyphens and periods Examples: 6042996401, 604-299-6401, 604.299.6401

ADDRESS	Any combination of numbers, upper and lower case letters (including underscore, number signs, hyphen symbols and spaces as needed)
POSTAL CODE	All upper and lower case letters and numbers (including spaces as needed)
CITY	All upper and lower case letters (including spaces as needed)
PROVINCE	All upper and lower case letters (including spaces as needed)
EMAIL	Any combination of numbers, upper and lower case letters (including underscore, "@" signs, hyphen symbols and spaces as needed)

## TEAM OFFICIAL REGISTRATION TEMPLATE – ACCEPTABLE REGISTRATION TEMPLATE FORMATS

The Headers of the Team Official Registration Template are:

ROLE	District/League	Club	Team Name	TEAM ID	FIRST NAME	MIDDLE NAME (optional)	LAST NAME	BIRTH DATE	AGE LEVEL/CATEGORY	GENDER (M/F)	HOME PHONE	ADDRESS	POSTAL CODE	CITY	PROVINCE	EMAIL
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- DO NOT change the name of these headers
- DO NOT remove any column
- DO NOT change the order of the columns

The acceptable format for data in each column/header is as follows. ONLY the formats listed below ARE ACCEPTABLE.

Header Name	Acceptable Formats (please note, if the format is not listed below, it is NOT ACCEPTABLE)
ROLE	Any combination of numbers, letters (including underscore and hyphen symbols) Examples: Coach, Assistant Coach, Team Manager, Trainer, Team Official, 2015-U6-010C, 0004589_TO, U16Coach007
District/League	All upper and lower case letters (including spaces as needed) No acronyms please.
Club	All upper and lower case letters (including spaces as needed) No acronyms please.
Team Name	All upper and lower case letters (including spaces as needed)
Team ID	Any combination of numbers, letters (including underscore and hyphen symbols) Examples: U17Lightning, BombersFC, U14 Metro Girls, Metro FC
FIRST NAME	All upper and lower case letters (including spaces, periods and hyphens as needed)
MIDDLE NAME (optional)	All upper and lower case letters (including spaces, periods and hyphens as needed)
LAST NAME	All upper and lower case letters (including spaces, periods and hyphens as needed)
BIRTH DATE	NOTE: This is an optional field for Team Officials ALL birth dates must be in ONLY ONE of the following formats <ul style="list-style-type: none"> <li>• YYYY/MM/DD</li> <li>• MM/DD/YYYY</li> <li>• MMM DD, YYYY</li> <li>• YYYY/DD/MM</li> <li>• DD/MM/YYYY</li> </ul>

	<ul style="list-style-type: none"> <li>• DD-MM-YYYY</li> <li>• Alpha Date (27-Sep-14)</li> </ul>
AGE LEVEL/CATEGORY	<p>(For the Age Level or Category the team official is involved with)</p> <p>YOUTH AGE LEVELS:</p> <ul style="list-style-type: none"> <li>• U3, U4, U5, U6</li> <li>• Under 3, Under 4, Under 5, Under 6</li> <li>• Under 03, Under 04, Under 05, Under 06</li> <li>• U03, U04, U05, U06</li> <li>• u3, u4, u5, u6</li> <li>• under 3, under 4, under 5, under 6</li> <li>• under 03, under 04, under 05, under 06</li> <li>• u03, u04, u05, u06</li> <li>• U7, Under 7, U07, u7, under 7, u07, Under 07, under 07</li> <li>• U8, Under 8, U08, u8, under 8, u08, Under 08, under 08</li> <li>• U9, Under 9, U09, u9, under 9, u09, Under 09, under 09</li> <li>• U10, Under 10, u10, under 10</li> <li>• U11, Under 11, u11, under 11</li> <li>• U12, Under 12, u12, under 12</li> <li>• U13, Under 13, u13, under 13</li> <li>• U14, Under 14, u14, under 14</li> <li>• U15, Under 15, u15, under 15</li> <li>• U16, Under 16, u16, under 16</li> <li>• U17, Under 17, u17, under 17</li> <li>• U18, Under 18, u18, under 18</li> </ul> <p>ADULT LEAGUE CATEGORIES:</p> <ul style="list-style-type: none"> <li>• A, a,</li> <li>• B, b, Under 21, under 21, U21, u21</li> <li>• C, c</li> <li>• SEC, sec, S, s, Spring, spring</li> <li>• M, m, masters, master, Masters, Master, Classics, classics, Over 30s, Over 35s, 35+, 30+</li> <li>• O, o, O40, o40, 40, Over 40s, 45+, 50+, 55+</li> </ul>
GENDER (M/F)	M, m F, f
HOME PHONE	All numbers including hyphens and periods Examples: 6042996401, 604-299-6401, 604.299.6401
ADDRESS	Any combination of numbers, upper and lower case letters (including underscore, number signs, hyphen symbols and spaces as needed)
POSTAL CODE	All upper and lower case letters and numbers (including spaces as needed)
CITY	All upper and lower case letters (including spaces as needed)
PROVINCE	All upper and lower case letters (including spaces as needed)
EMAIL	Any combination of numbers, upper and lower case letters (including underscore, "@" signs, hyphen symbols and spaces as needed)

## PREPARING REGISTRATION TEMPLATES FOR SUBMISSION

To prepare each registration template for submission:

1. Collect all registration data from member clubs/teams as appropriate
2. Ensure **ALL** data is provided and in an acceptable format as noted above  
**\*\*\*IMPORTANT** – While all data is mandatory for compliance, please note that if some critical data is missing or not provided in an acceptable format the file will not upload**\*\*\***
3. **DOUBLE CHECK!** All birth dates within the data being uploaded are in the same format (which is one of those provided above)
4. Ensure the file is saved in **CSV format**

Has Your Registration Template Been Saved in Excel Format? Change to CSV by:

1. Open the Excel File
2. Go to File > Save As
3. From the "Save as type:" dropdown menu, select **CSV (Comma Delimited)**
4. Follow the prompts/questions to ensure the file is saved and the formatting correctly.

## FEATURES TO NOTE

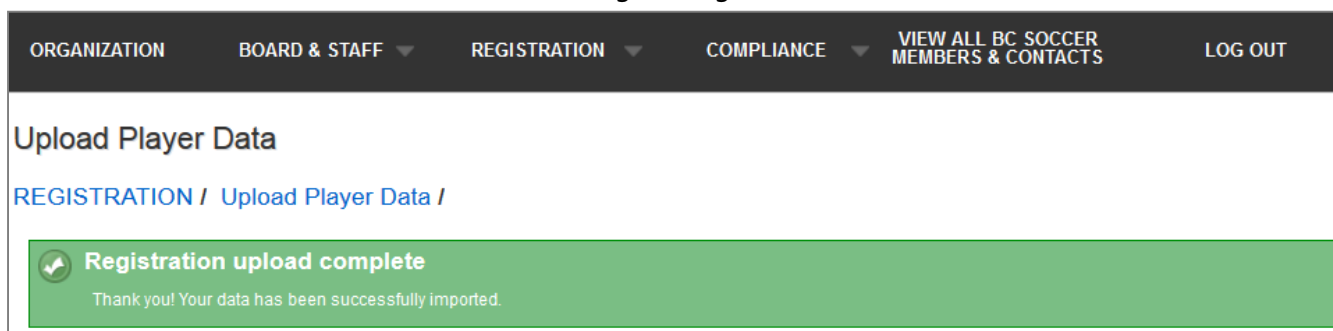
- Data CANNOT be deleted from the CRM
- There is no limit to the number of registration uploads made. This means Youth Districts/Adult Leagues have the ability to:
  - Submit registration data received from affiliated clubs/teams as they receive it prior to and/or after the submission deadline (per the [BC Soccer Registration Policy Manual](#))
  - Ability to submit data by affiliated club/team (as a Summary Form is generated for each successful upload)

## SUBMITTING PLAYER REGISTRATION DATA

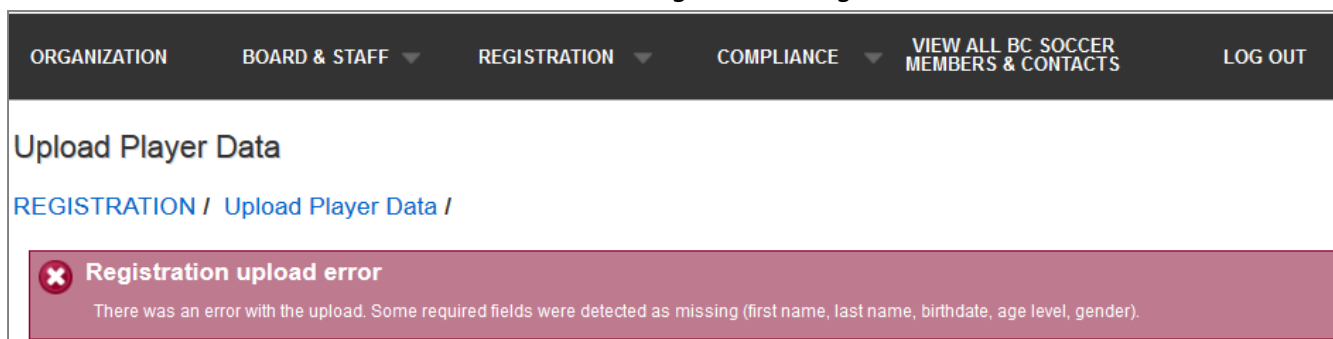
1. Log in to the BC Soccer CRM  
<https://crm.bcsoccer.net/admin/auth/login>
2. On the **REGISTRATION** tab select **Upload Player Data**
3. Make the appropriate selections from the dropdown lists labeled:
  - a. **Select Registration Submission**
  - b. **Please select the format birth dates are provided in**
4. Click **Browse** and select the CSV file for upload  
(Note: It may take a few minutes to upload, DO NOT close the browser or select the back button)

5. At the bottom right of the screen click on the **SUBMIT** button
6. Review the entries to be imported
  - a. As applicable, make selections to remove or import duplicate data the system has identified. (The CRM is set up to automatically remove duplicates within the same upload; as well as, against previous uploads for a given playing season).
7. Make the appropriate selection from the dropdown list labeled “**Select Action**” and click the **Upload** button (Note: It may take a few minutes to upload, DO NOT close the browser)

A **SUCCESSFUL** Submission will show the following message:



An **UNSUCCESSFUL** Submission will show the following error message:



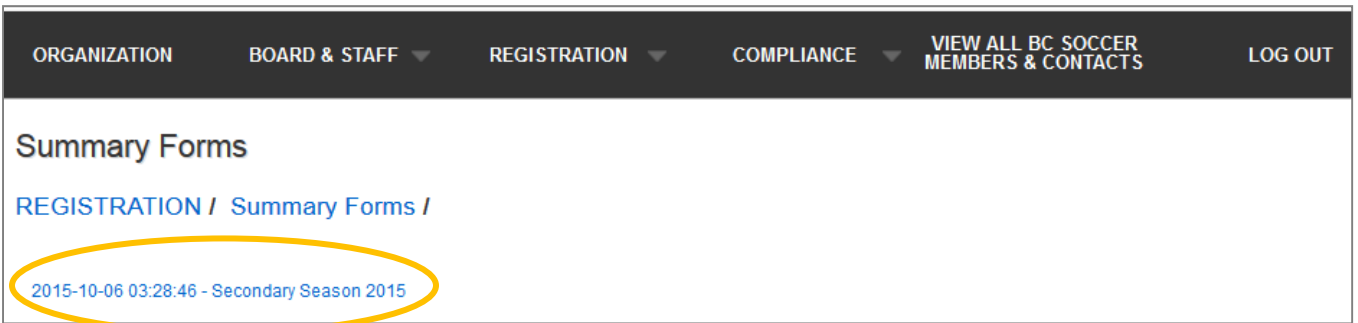
If this message appears, re-check the CSV file for completeness and acceptable data formats

## VIEWING SUMMARY FORMS

The CRM generates a Summary Form for each successful Player Registration Upload made. To view Summary Forms for each upload:

1. On the **REGISTRATION** tab select **Summary Forms**
2. A list of all successful submissions will appear, noting the date and time the data was submitted and for what submission deadline. Each submission is a link.

Example:



3. Click on the link to view the Summary Form
4. In the top left of the screen there are options to Print or export the Summary form to PDF. Click on these links and follow the prompts as desired.

## PAYMENT TO BC SOCCER

The Summary Form(s) provides the total amount owed to BC Soccer (not including any installment payments made accordingly). Please make payment for the amount shown and submit via cheque payable to BC Soccer Association.

**NOTE:** If multiple submissions have been made prior to a registration submission deadline, please submit ONE cheque for the total sum of the submissions made.

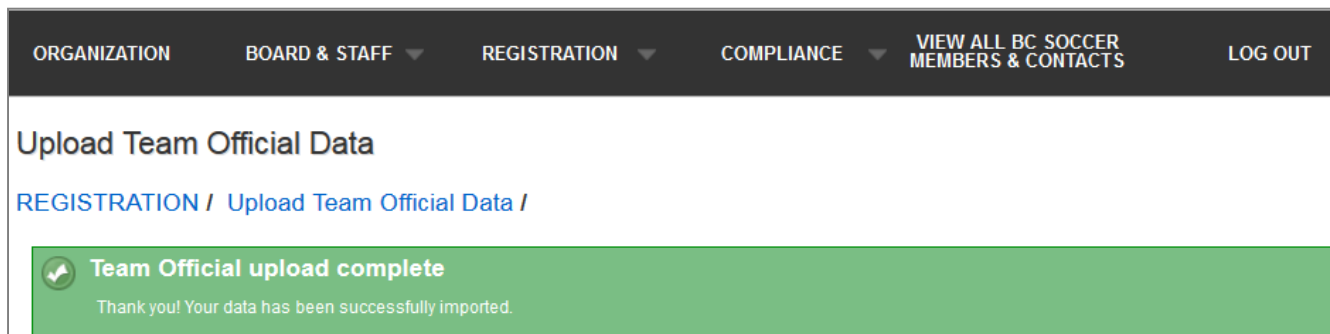
## SUBMITTING TEAM OFFICIAL REGISTRATION DATA

1. Log in to the BC Soccer CRM  
<https://crm.bcsoccer.net/admin/auth/login>
2. On the **REGISTRATION** tab select **Upload Team Official Data**
3. Make the appropriate selections from the dropdown lists labeled:
  - a. **Select Registration Submission**
  - b. **Please select the format birth dates are provided in**
4. Click **Browse** and select the CSV file for upload  
(Note: It may take a few minutes to upload, DO NOT close the browser or select the back button)
5. At the bottom right of the screen click on the **SUBMIT** button
6. Review the entries to be imported  
**NOTE:** The CRM does not check for duplicates for Team Official data



7. Make the appropriate selection from the dropdown list labeled **“Select Action”** and click the **Upload** button (Note: It may take a few minutes to upload, DO NOT close the browser or select the back button)

The following message will appear:



## VIEWING DATA & CREATING ID CARDS

The CRM has the ability to export all player and/or team official data submitted to excel format; as well as, create BC Soccer ID cards (without a picture) for players and team officials.

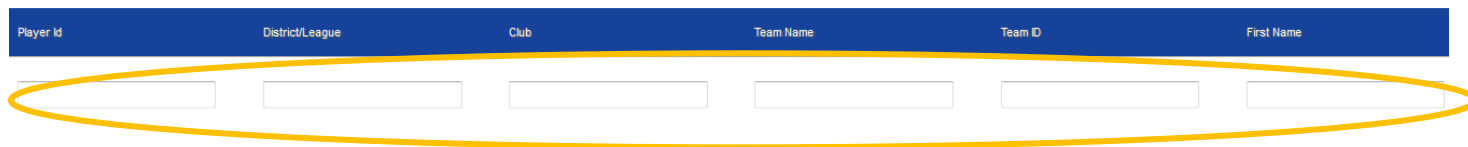
To access these features, on the **REGISTRATION** tab select **View Player Data** or **View Team Official Data**.

Using **View Player Data** as an example:

1. To export all player data to excel, click on the blue button that reads **“Click here to export all players.”**

**OR**

2. To generate Player ID cards, click on the blue button that reads **“Click here to export player cards.”**  
Please note that all of the empty boxes above each column can be used to search and/or filter the data:



Therefore, using the filters the data can be narrowed down to a particular age group, team, or individual player or team official.

If the data is filtered prior to clicking **“Click here to export player cards”** the ID cards will only be generated for the filtered data.

For Example:

### No filtering

<b>BC Soccer ID Card</b> Surname: <b>Smigh</b> Given Name(s): <b>John</b> Birthdate (dd-mm-yyyy): <b>2002-07-23</b> Player ID #: <b>2015</b> <b>14</b> Club: <b>Club A</b> Team: <b>Gunners</b>	<b>BC Soccer ID Card</b> Surname: <b>Sahota</b> Given Name(s): <b>Ampritpal</b> Birthdate (dd-mm-yyyy): <b>2002-12-02</b> Player ID #: <b>2015</b> <b>14</b> Club: <b>Club A</b> Team: <b>Gunners</b>
<b>BC Soccer ID Card</b> Surname: <b>White</b> Given Name(s): <b>Peter</b> Birthdate (dd-mm-yyyy): <b>2002-01-16</b> Player ID #: <b>2015</b> <b>14</b> Club: <b>Club A</b> Team: <b>Gunners</b>	<b>BC Soccer ID Card</b> Surname: <b>Polisky</b> Given Name(s): <b>Sara</b> Birthdate (dd-mm-yyyy): <b>2002-10-01</b> Player ID #: <b>2015</b> <b>14</b> Club: <b>Club B</b> Team: <b>Strikers</b>
<b>BC Soccer ID Card</b> Surname: <b>Chang</b> Given Name(s): <b>Fiona</b> Birthdate (dd-mm-yyyy): <b>2002-09-19</b> Player ID #: <b>2015</b> <b>14</b> Club: <b>Club B</b> Team: <b>Strikers</b>	<b>BC Soccer ID Card</b> Surname: <b>Rollings</b> Given Name(s): <b>Jessica</b> Birthdate (dd-mm-yyyy): <b>2002-08-02</b> Player ID #: <b>2015</b> <b>14</b> Club: <b>Club B</b> Team: <b>Strikers</b>
<b>BC Soccer ID Card</b> Surname: <b>Xu</b> Given Name(s): <b>Zi Yao</b> Birthdate (dd-mm-yyyy): <b>1999-04-13</b> Player ID #: <b>2015</b> <b>14</b> Club: <b>Club C</b> Team: <b>Earthquakes</b>	<b>BC Soccer ID Card</b> Surname: <b>Jackson</b> Given Name(s): <b>Jared</b> Birthdate (dd-mm-yyyy): <b>1999-03-10</b> Player ID #: <b>2015</b> <b>14</b> Club: <b>Club C</b> Team: <b>Earthquakes</b>
<b>BC Soccer ID Card</b> Surname: <b>Sidhu</b> Given Name(s): <b>Randeep</b> Birthdate (dd-mm-yyyy): <b>2001-11-11</b> Player ID #: <b>2015</b> <b>14</b> Club: <b>Club C</b> Team: <b>Earthquakes</b>	<b>BC Soccer ID Card</b> Surname: <b>Chu</b> Given Name(s): <b>Kelley</b> Birthdate (dd-mm-yyyy): <b>2001-12-29</b> Player ID #: <b>2015</b> <b>14</b> Club: <b>Club D</b> Team: <b>Attack</b>

### Filtered for Age Level and Team Name

<b>BC Soccer ID Card</b> Surname: <b>Smigh</b> Given Name(s): <b>John</b> Birthdate (dd-mm-yyyy): <b>2002-07-23</b> Player ID #: <b>2015</b> <b>14</b> Club: <b>Club A</b> Team: <b>Gunners</b>	<b>BC Soccer ID Card</b> Surname: <b>Sahota</b> Given Name(s): <b>Ampritpal</b> Birthdate (dd-mm-yyyy): <b>2002-12-02</b> Player ID #: <b>2015</b> <b>14</b> Club: <b>Club A</b> Team: <b>Gunners</b>
<b>BC Soccer ID Card</b> Surname: <b>White</b> Given Name(s): <b>Peter</b> Birthdate (dd-mm-yyyy): <b>2002-01-16</b> Player ID #: <b>2015</b> <b>14</b> Club: <b>Club A</b> Team: <b>Gunners</b>	<b>BC Soccer ID Card</b> Surname: <b>White</b> Given Name(s): <b>Peter</b> Birthdate (dd-mm-yyyy): <b>2002-01-16</b> Player ID #: <b>2015</b> <b>14</b> Club: <b>Club A</b> Team: <b>Gunners</b>
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## REGISTRATION UPLOAD HISTORY

To simply view player and/or team official submissions on the **REGISTRATION** tab select **Registration Upload History**.

From here, use the buttons and links to view previous registration submissions or all data submitted.

## ADDITIONAL ASSISTANCE

BC Soccer has implemented the CRM to further improve the operational efficiency of member registration submission. If additional assistance is needed, please contact Lori D'Andrea, Director of Community Development via email at [loridandrea@bcsoccer.net](mailto:loridandrea@bcsoccer.net).