Pickleball Canada National System (PCNS) Guide for Alberta

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Introduction to Guide

This guide contains:

- information helpful to Alberta clubs in adopting and implementing the Pickleball Canada National System (PCNS),
- information needed by Pickleball Alberta (PA) to help PA implement PCNS at a provincial level,
- information needed for PA and Alberta clubs to operate PCNS and maintain PCNS functions post-implementation.

This information will include:

- a FAQ that captures questions and answers asked of PCO and Trackie, by PA and Alberta clubs, during the setup and implementation of PCNS, and
- pointers to other documentation that complements this guide, such as:
    - a PCO-produced PCNS user guide (for both members and administrators),
    - videos on how to use PCNS,
    - links to club PCNS websites, and
    - past communications with Alberta clubs regarding the implementation of PCNS.

Introduction to PCNS

PCNS allows national, provincial and club level pickleball organizations to:
- manage their membership, including receipt of membership fee payments (Membership Management System or MMS),
- establish and maintain web pages targeted to members (Content Management System or CMS),
- email members,
- sell goods such as club T-shirts via a Market Place,
- capture "Places to Play" information

Future phases of PCNS will bring this additional functionality:
- improvements to the Market Place function,
- management of events such as ratings clinics, indoor and outdoor play times,
- competition management
- ratings management
- play/court scheduling

Introductory information about PCNS has been distributed to all affiliated Alberta Clubs, and is available for review here: https://pickleballalberta.org/pcns-documentation/ . This includes:

- 2021-01-13 Update to Clubs 'It's Almost Here - the National System is Coming to Alberta and its' Clubs
- 2021-02-01 PCNS Update to Clubs
- 2021-02-10 PCNS Update to Clubs
- 2021-05- 13 Update to Clubs Using PAWA
- 2021-05- 13 Update to Clubs with own membership systems

An up-to-date copy of this Guide can also be found on that web page, as well as other information intended to help clubs implement and administer their portion of PCNS.

Short video demos of some of the functionality of PCNS are available inside the tutorial section of PCNS and at the links below:

      Managing your Member List: https://vimeo.com/448174148/bd17664046

      Reporting: https://vimeo.com/453044026/7ab7ff0ac3

      Club Admin: https://vimeo.com/458386240/0f08f12af3

      Editing your Club/Province webpage: https://vimeo.com/421937575/fab55fbf63

      Individual Registration: https://vimeo.com/473343266/e3bb407de8

      Places to Play: https://vimeo.com/462621462/cb4913a5e9

A 57-minute video of a Zoom webinar showing how club administrators can use PCNS to select and email members is available here: https://drive.google.com/file/d/1s_-fTw13fvqJBYy0IP3xaZRoo3dCwEHc/view

Getting Started with PCNS

Accessing PCNS

PCNS is found online at: https://pickleballcanada.org/. Administrators with a login ID may prefer to access the site at this point: https://secure.pickleballcanada.org/login/

If you were recently a member of a club affiliated with Pickleball Alberta and Pickleball Canada, then you were also a PCO member. The first time an existing PCO member (non-administrator) wishes to access PCNS, they must set up a new password. Passwords from the former PCO system were not carried over from the PCO's previous system. The steps to set up a new password are as follows:

1. Go to webpage https://secure.pickleballcanada.org/login/
2. Press the "Forgot?" link after the word Password.
3. At the "Forgot your password" screen, enter the email address you use for your club, Pickleball Alberta and Pickleball Canada account. Press Submit.
4. Go to your email account and follow the instructions in the email from Pickleball Canada.

If you have been given administrative access to PCNS, you will automatically get an email from PCNS inviting you to complete the set up of your administrative access. Follow the instructions in that email.

You may use one account for both member and administrator access, but if your club has designated club email addresses, you should use your personal email address for your member account and your club email address for your administrative account.

Club Use of PCNS

Alberta Clubs affiliated with Pickleball Alberta may wish to go through the following process to learn more about PCNS, make decisions about how to implement it for your club, and then implement its use for your members. Clubs wishing to be affiliated are welcome any time and can follow a similar process.

1. Read the introductory information about PCNS described in the previous section and have a look at the demo videos or contact PA and ask for a personalize introduction to PCNS via Zoom.

2. From the January and February updates to clubs (mentioned in the previous section), you will have learned that PCO has had to automate the onerous work associated with membership management. You will also have gained insights into the benefits your volunteers and members gain by using PCNS and by being affiliated with PCO. If you have questions not answered in that material, don't hesitate to:
    a. ask PA for a demonstration of PCNS (given over Zoom these days),
    b. contact PA with any additional questions you have.

3. Make a club decision whether and how to proceed with PCNS. Options are:
    a. use PCNS to collect the national, provincial and club membership fees and to manage your membership information, or
    b. use part of PCNS. Specifically:
        i.   use PCNS to collect the national and provincial membership fees,
        ii. set your club fee in PCNS to zero dollars (or to a nominal $0.01), but list your club in PCNS so members can declare their connection to your club there, and
        iii. use your own current manual methods or system to collect your club membership fees.

    Option 3b (setting your club fee in PCNS to zero) may be warranted if:

    o   your club does not yet have a club bank account (a prerequisite to having your club membership fees transferred to you), or
    o   your club already has a sophisticated membership management system, with advanced functionality not yet available in PCNS, and you need to preserve and use that advanced functionality until PCNS meets your club's needs.

    If you use option 3b, there is an advantage to setting your club fee at a nominal $0.01 rather than zero. By having the member pay at least 1 cent inside PCNS towards a club fee, the club administrator will be able to look up member payment receipts. If there are no fees paid to the club within PCNS, club administrators cannot see the member payments for PA and PCO fees.

4. Send PA a signed copy of an affiliation agreement if you haven't already done so. This agreement is new to Alberta in 2021. It is needed to help PA and Pickleball Canada (PCO) become recognized by the provincial and federal government as official sports organizations, opening the door to additional funding and support. The Affiliate Club Agreement is available from PA or online at https://pickleballalberta.org/pcns-docs-2/.

5. Set up a project team in your club to guide your club's implementation of PCNS. Email Brenda Feser at membership@pickleballalberta.org with the name and email address of:

a. your team leader,
b. team members,
c. head club administrator of PCNS.

Future communications from PA to your club, regarding PCNS, will then be routed to your team leader and head club administrator. The club administrator will be able to add other club volunteers as full or partial administrators for your club.

6. Set up a meeting with the PA PCNS Project Team to:
a. review the PCO and PA plans and timelines for implementation and have input to the provincial plan,
b. help you work out a club plan for PCNS implementation.

7. If necessary, establish a plan to convert to a January 1 to December 31 membership year. (See PCNS Business Rules and Conventions for the rationale for a standardized membership year across Canada.)
a. Most clubs are transitioning by making the 2021 membership year run from May 1, 2021 to December 31, 2021, setting up the 2022 year to start January 1.
b. This change may require your club to amend your bylaws. This, in turn, may require:
i. drafting a bylaw change and having it approved by your membership at your next annual general meeting, and
ii. submitting your membership-approved bylaw change to Service Alberta's Corporate Registry, for their approval, if you are a non-profit organization incorporated in accordance with Alberta's Societies Act.

8. If you have a current membership management system outside of PA's Wild Apricot (PAWA) system, then you may wish to compare the PCO and PA membership data fields with your own system's fields. If there are key membership data fields in your system that are not already in PCO or PA systems, PA may be able to help you have this unique club data loaded into PCNS, on a one-time basis, as part of the implementation plan.

9. Appendix D contains a description of PCNS configuration settings that your club can set for its membership information management. Review this appendix and start planning what your club settings should be. This will help you quickly set up your club's settings in PCNS when you are ready to start using the system. If you'd like your proposed settings reviewed by the PA implementation team, contact them.

10. One option available in PCNS is the set up and use of some webpages dedicated to your club. You can, for example:
a. choose not to use any of this PCNS website functionality,
b. set up a simple single page or set up a simple menu with a few pages for your club (called a Tier 1 website; available at no extra cost),
c. retain Trackie to develop a sophisticated website for you, in future, at additional cost (called a Tier 2 or Tier 3 website),
d. use the PCNS web-functionality to direct your members to another website you may already be using and want to retain.

11. You can explore this functionality of PCNS now, using the PCNS demo site. PA has sent an email providing access to this site to several clubs in Alberta already. If you don't already have access, ask PA to send you the email providing this access.

12. In response to step 5, PA will provide your lead club administrator with access to the production (real) version of PCNS. Then in early March (or as soon as possible, if you are reading this after March), your club administrators can start adding the information you prepared under steps 8 to 10. Again, PA can be engaged for help with this process if needed.

13. In April, your club should be nearly ready for your club's implementation of PCNS, which we are targeting to take place in June, after the traditional start to the May 1 membership year used by most clubs in Alberta.
    a. It is hoped that all clubs currently using PAWA can be aligned for a June cutover process.
    b. The month of April and possibly May can be used for any data upload planning and testing, if that is needed per step 8.
    c. Clubs not using PAWA (i.e. affiliated with PA but not integrated into PAWA) could be brought into PCNS later than June 2021, although as the summer progresses it may be more difficult to engage your volunteers to work on the system. We encourage all clubs to work on their club set up in April and May. The renewal period for 2022 memberships will open on October 1, 2021. Therefore, it is very important for all affiliated Alberta clubs to be set up in PCNS by the end of September.

14. See the Implementation Considerations section for details on the June cutover to PCNS.

How PCNS Works and is Administered

Developer - Trackie

PCNS has been developed by and is maintained by Trackie, a Canadian company, under contract to PCO. In collaboration with provincial pickleball organizations, PCO selected Trackie as the best option for delivering a national system with all the functionality needed. Trackie has a proven track record delivering and supporting similar systems for other multi-level (national, provincial, club and member-level) systems in Canada.

Administration

Scope of Administration

- A national administrator can change some settings at the national level and can see the membership of all provinces and clubs but cannot see or change provincial or club settings unless they make themselves a (temporary) provincial or club administrator.
- A provincial administrator can change some settings for their province, and can see the membership across the province, but cannot see or change settings of other provinces and cannot see the membership of other provinces.
- A provincial administrator cannot see or change the settings of a club unless they are also a (temporary) administrator of the club.
- A club administrator can change some settings for their club and can see their club membership but cannot see or change settings of other clubs and cannot see the membership of other clubs.

Administration Delegation

- Trackie is the master administrator for all of PCNS and gives national full administrator rights to a designated "master administrator" in PCO.
- The PCO master administrator can give admin rights to other (full or partial) national administrators and to the master administrator in each provincial/territorial sports organization (PTSO).
- The provincial master administrator can give full or partial admin rights to other provincial administrators and gives full admin rights to the master administrator in each club organization.
- The master club administrator can give full or partial club admin rights to other club administrators. Keep in mind that when PCNS administrator rights are first granted they default to partial administrator. Be sure to assign the appropriate rights when you set up administrator privileges for your club.

See the PCO PCNS User Guide (on this web page) for instructions on how to set up your own admin access and how to delegate administration to others.

Partial Administration

See the PCO PCNS User Guide for a PCNS screen shot showing the types of rights that can be assigned to partial administrators.

If assigning someone "web only" partial admin access, you will also need to assign them at least viewing level access to club settings and member list. If an admin has no access to club settings and member list, PCNS does not allow them to edit the web page.

Payment Processing

See the PCO PCNS User Guide (on this web page) for an explanation of how membership fees are set, collected and made available for transfer to provinces and clubs.

PCNS Business Rules and Conventions

The following rules and conventions have been established for the reasons provided.

Rule (R) or Convention(C)	Rationale
R: Provinces and clubs affiliated with PCO must use PCNS to collect 2022 PCO and provincial membership fees.	The amount of work required by volunteers, each year, to manually process, reconcile and maintain membership data and payments is overwhelming and unsustainable. Nationally integrated and reliable membership information is required for pickleball sports organizations to be officially recognized by Sport Canada and provincial governments. Official recognition opens the door to further funding, support and development, all of which helps clubs obtain more facilities and deliver better services to members in the future.
R: All club members must also be members of their PTSO and PCO to be an affiliated club.	Helps ensure the viability of PTSOs and PCO, which is essential for the development and recognition of pickleball in Canada. Ensures all members are covered by PCO's sport injury insurance during club events. Ensures clubs have full protection under the Commercial and General Liability insurance program and the Directors and Officers insurance provided under the Pickleball Canada Insurance program.
R: Membership year shall be Jan 1 to Dec 31.	A common membership year allows members to get only one joint renewal notice applicable to the national, provincial and club membership fee. This avoids the confusion and annoyance that would arise if members were to receive multiple notices and have to make multiple payments each year. A common membership year also aligns club memberships with PCO memberships for insurance coverage purposes.
R: Clubs must have a club (non-personal) bank account	PCO cannot accept the liability or risk that would arise if funds could be transferred to personal bank accounts. (Clubs without a bank account can still use PCNS to collect membership fees for PCO and PA, and to collect

Rule (R) or Convention(C)	Rationale
to have funds collected through PCNS.	their club member information, by setting their club fee in PCNS to zero and collecting their club fees outside of PCNS.)
C: A combined PCO and PA Renewal notice will be issued to members 30 days before membership expiry (i.e., on Dec 1.)	As can be seen in Appendix D, clubs have the option of also having their renewal notice issued Dec 1, in which case the renewal notice for all three organizations will be issued in the same email. A common membership renewal notice avoids confusion and annoyance, per the above reason. Clubs also have the option of having their renewal notice issued separately, on a different date. This option is primarily for seasonal clubs. This is the only system automated renewal reminder. To issue a renewal reminder on an alternative data, administrators can create and issue a separate email to members. Your club may want to communicate other renewal reminders to your members as they will be able to renew their 'next year' membership as early as October 1st.
C: New memberships purchased on or after Oct 1 of each year will be in effect until Dec 31 of the next year.	This means that new memberships purchased up to Sept 30 expire on Dec 31 of the current year. The grace period of up to three months, for new memberships, provides a benefit to members who might otherwise be reluctant to pay for a short-term membership in November or December. Keeping members happy minimizes work for volunteers and fulfills our duty to members! (The alternative would be to pro-rate fees throughout the year. The PCO and provincial fees are deemed too small to prorate, however clubs have the option to prorate their fees if they wish.)
R: Memberships that have lapsed more than 2 years will be removed from PCNS[1].	Quebec and most other provinces have privacy legislation that prohibits the retention and use of customers' (members') personal information after a business reason for having that information no longer exists. This protects privacy.

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[1] Discussed by PCNS Key Contacts (PCO and PTSOs) May 6, 2021. Being recommended to PCO Board and likely to be adopted.

Membership Management for Administrators

PCNS allows members to join or renew their membership with multiple affiliated clubs, one or more provincial associations, and Pickleball Canada, all in one place. PCNS collects the fees for each, and automatically splits the fees collected into accounts which each organization (province or club) can access.

Here are some additional features and explanations of PCNS membership management:

- One family member may renew all their family's memberships at once.
- Members may pay by credit card, PayPal or Interac Online. (See the Financial Management section for more cost information.)
- When a member registers, PCNS will have the member fill out all the information needed by PCO and PA. If a club has any additional information needs, it can add questions (fields) to the registration form (membership record).
- PCNS automatically advances the member's membership "paid to" date when they renew and pay for their membership.
- PCNS will automatically set a member's status to inactive if they do not renew by their membership expiry date.
- PCNS automatically attempts to minimize the potential duplication of membership records. As an example, it does so, when a member first registers or renews, by searching for members with a similar name or the same partial name and same birthdate.
- PCNS automatically and immediately assigns a new PCO number to a new member.
- PCNS automatically issues membership renewal notices via email, and automatically issues renewal confirmation emails.

Club administrators can:

- define different membership categories and types, and set the club fees for each;
- create club messages that will be automatically emailed to members in their renewal reminders, along with a message from Pickleball Alberta and Pickleball Canada;
- look up individual members and members meeting certain search (filter) criteria;
- edit member records; and
- export (copy) some or all club member information to a csv file (a format that can be read by Microsoft Excel and other spreadsheet programs).

Filtering Members

On the bottom half of your club administrator's "My Members" page, you will see a list of your club's members. By default, this list includes both active memberships and those who have an expired membership. To quickly see a list of active members only, set the status filter to "Active", and press the blue Search button.

This will result in a member list being displayed below that only contains active members. (Note: This should produce the same result as using a filter and setting the filter to:

- Field = Club Expiry Date
- Contains box = is greater than or equal to
- YYYY MM DD = today's date.)

To clear a filter, click the orange eraser icon to the left of the blue Search button.

To save a search for later re-use, click the disk icon next to the Search button and give your search a name and description.

To recall a saved search, click the folder icon next to the disk icon.

To search for membership records with certain properties, apply additional filters. For example, to search for members who are in Alberta Sport Zone 6 – Edmonton:

- click the green "Add Filter" link

- pick "Alberta Sport Zone" from the fields list box
- pick "is equal" from the contains or operator box
- pick "Zone 6 – Edmonton" from the Keyword box.

Apply to checked: Edit | Remove | Email | Export | Print Report | More Info | Less Info   Visible fields ▾   Sort by ▾

Viewing entries: 1 - 500 of 552   Page size: [500 ▾]

	Check all	PCO #	Gender	Home Club	Expiry Date	Alberta Sports Zone	Address	City	Postal Code	PA Club Rating	Status	Join Dat
☐ ✏✗✉		14967	Female	Edmonton Pickleball Club	2021-12-31	Zone 6 - Edmonton	9740 - 67 Ave NW	Edmonton	T6E 0P2		Active	2018-05

- click the Search button after setting each search criteria.

To combine filter criteria, click the "Add Filter" link again and fill in the details of the additional filter.

Note that filters can be combined with an "And" operator or an "Or" operator.

- If you use "And" members will have to meet both filter criteria to appear in the filtered list.
- If you use "Or" members will appear on your list who fulfill either criterion.

Using a Member List

Between the filter settings and the "Viewing entries…" list of members, you will see the line:

Before picking one of these options, select one or more members from the filtered member list below by checking the check box in front of the members you are selecting. Alternatively, select them all at once by clicking on the first check box. Then pick one of the following:

- Press Edit to edit each checked record, one at a time,
- Press Email to launch an email to all selected (checked) members.
- Press Export to export the membership details to a csv (spreadsheet) file
- Press Print Report to print member details
- Press More Info to see more information (expanded rows) on all selected members, or
- Press Less Info to turn off the "More Info" expansion.

To change the sort order of the Viewing entries, click the "Sort by" link.

Viewing Membership Information

Besides the basic membership information you can see on each member on the "My Members" pages, there are at least four ways to see more membership information on each member.

1. In the previous Using a Member List subsection, you learned how to press "More Info" to see an expanded row (more information) on each selected member.
2. You can see the same expanded row for one member at a time by clicking on that member's name.
3. You can see and edit some member registration information by clicking the blue pencil before a member's name.
4. You can see all of a member's registration information, including all of the member's club memberships, by clicking the head and shoulders icon before the member's name.

Note that information you see in each expanded and contracted membership row can be changed by clicking this Visible Fields link.

Apply to checked: Edit | Remove | Email | Export | Print Report | More Info | Less Info   Visible fields ▾   Sort by ▾

Viewing entries: 1 - 500 of 6036 Page size: 500 ▾

Use this Visible Fields link, for example, to have your club expiry date show up for each member.

Editing Membership Information

1. Locate a particular member record (e.g., by using the Filtering Members process above)
2. Press the blue edit (pencil) icon beside the member record

Apply to checked: Edit | Remove | Email | Export | Print Report | More Info | Less Info

Viewing entries: 1 - 1 of 1 Page size: 100 ▾

☐ Check all	Full Name	PCO #	Gender	Membership Type	Category	Home Club	Registration Date	Da
☐ ✏ ✖ ✉	👤 Keroack, Ray	20965	Male	General	Open	St. Albert Pickleball Club	2021-04-01	19

Editing Home Club

Members and PA administrators can change a member's home club if the member belongs to two or more clubs, including V-Club AB. Club administrators are not able to make this change, and should engage the member or a PA administrator if they have a need for such a change.

The process for a member to make this change is described in Membership Management for Members.

The process for a PA Administrator to make this change is as follows:

1. Locate the specific member record in an administrator's My Members screen at the Pickleball Alberta level. (This will not work if done inside a club's My Members screen.)

2. Click the head and shoulders icon at the beginning of that member record.

Apply to checked: Edit | Remove | Email | Export | Print Report | More Info | Less Info

Viewing entries: 1 - 1 of 1 Page size: 100 ▾

■Check all	Full Name	PCO #	Gender	Membership Type	Category
☐ ✏ ✕ ✉	👤 Keroack,	20965	Male	General	Open

3. Inside the member pop-up, scroll down to the Club Membership Information.
4. If the member belongs to two or more clubs, one will be listed with a green house icon in front of it and the other club memberships will have a grey house icon. The green house icon indicates that member's current home club. Click one of the grey house icons to make that club the home club.

Deleting a Member Record

PCNS allows an administrator to temporarily delete (e.g. suspend) a member or permanently delete a member. Club administrators are asked never to permanently delete a member without engaging Pickleball Alberta.

As described in the Business Rules section, PCO will likely soon adopt a business rule that will result in membership records being automatically and permanently if they have been expired (lapsed) for two years.

To delete or temporarily delete a member from your club only:

- click the red x icon in front of the member record. This brings up a pop-window like this:

REMOVE ENTRY   X

First name	Last name	Home Club	Type	Category	Cost
Ray	Keroack	St. Albert Pickleball Club	2021 Membership	Adult	$0.00

⚠ If you *"REMOVE"* an entry you will still have access to it (will show at the bottom of your list with a ~~line through~~ it and you can re-add the entry if needed). If you *"DELETE FOREVER"* you will completely delete the entry and it cannot be undone.

REMOVE   DELETE FOREVER   CANCEL

- press the blue Remove button. (Do NOT press Delete Forever.)

The member record will no longer show up in a membership list if you set a filter of "Dropped is equal to Not Dropped."

To undelete a deleted member, press the green semi-circle icon to the left of the member record, then press the Reinitialize button.

A member that is deleted forever cannot be reinitialized by a club or PA administrator. The membership information will still reside in PCNS though. Deleting a member temporarily or "forever" does not remove them from any other clubs to which they may belong.

Merging Duplicate Membership Records

Despite system prompts and messaging to members, if it fairly common for members to create a new PCNS membership record when renewing, rather than extending their former membership. PTSOs are working with the PCNS developer to further address this issue, but here's how to handle this when you spot it.

- Send an email to Membership@PickleballAlberta.org asking for the duplicate records to be merged. Include the member's name and their PCO numbers in both their old and new records.
- Inform the member of their duplication, advise them their records will be merged so that their old PCO number is preserved, and provide them with guidance to avoid a recurrence of this in future years.

PA will forward your request to the developer. The developer will preserve and use any new membership information (e.g. changed name, new address, new phone number), the old PCO number, and both old and new payment information. This preserves the complete financial history and membership record of the member. More importantly, this merging fixes the duplication at the club, provincial, and national levels.

Conversely, if a club simply deletes (removes) the member's old (expired) membership record, the duplication will still exist at the PTSO and national levels. For this reason, clubs are asked to request merges of duplicate membership records rather than deleting a membership record.

Exporting and Printing Member Lists

As of June 2021, the Print Report command at the top of a member list does not yet work in PCNS. However, the Export command does work and can be used to produce a spreadsheet of membership records. If desired, the spreadsheet can be further filtered, formatted, and printed using a spreadsheet program.

Apply to checked: Edit | Remove | Email | Export | Print Report | More Info | Less Info   Visible fields ▼   Sort by ▼

Viewing entries: 1 - 1 of 1   Page size: 100 ▼

☐ Check all	Full Name ▲	PCO #	PCO Expiry Date	Club Expiry Date
☐ ✎ ✗ ✉	👤 Keroack, Ray	20965	2021-12-31	2021-12-31

Here are some steps to illustrate this process:

1. If desired, use a filter to find and display certain members of our club on your My Members page. (See the Filtering Members section for an explanation of filtering.)
2. Click the "Check all" box at the top of the filtered member list.
3. Click "Export" in the "Apply to checked:" row.
4. You will next see a panel like the following:

> **EXPORT DATA**
>
> ◉ Spreadsheet   ○ Other
>
> Delimiter: ◉ , (comma) ○ ; (semi-colon) ○ (tab)
>
> Force fields to be quoted: ◉ No ○ Yes [?]
>
> **What would you like to export:**
>
> ☑ Individuals (+) View fields
> ☑ Include removed
>
> **EXPORT**

5. Leave the settings as indicated in the panel above to export all possible membership fields. Alternatively, click the View fields link to select only those fields desired in your export.
6. Unselect the "include removed" if you wish to further filter out any removed members.
7. Click the green "Export" bar at the bottom of the panel.
8. Your computer's "Save as" function window will open. In this window, select the desired file name and location, and click save. While doing this step, ensure you:
   a. leave the file type as "csv" (comma separated values), and
   b. make a note of the location where the file is being stored.
9. Use your computer's spreadsheet program, such as Microsoft Excel or a free Google Sheets program to open that saved file and, if desired, to analyze, filter, sort, format and/or print the file.

Custom Messages

There are four types of custom messages club administrators can compose and pre-set in PCNS. These messages are automatically displayed or emailed to members at various points in the registration or membership renewal process.

The club messages are typically accompanied by similar messages from PA and PCO. To present these messages cleanly and professionally to members, it is recommended that club messages use similar formats (e.g. fonts and font styles) as the PCO and PA messages.

The process of setting or editing of these messages is described in Appendix D, Section 01: General Information.

Messages can contain text, images, links, files (e.g. documents) and videos.

Each message type is described below.

Confirmation/Receipt Message
- This message is displayed to a member on a PCNS screen immediately after joining or renewing.
- If your club is collecting its membership fees through PCNS, your club may wish to use a message such as the following:

    > Your payment has been received by the **Edson Pickleball Club**. We look forward to seeing you on our courts!

- The corresponding PA message is:

    > **Pickleball Alberta** confirms your payment for the current membership year has been received. Thanks for supporting the development of our favourite sport!

Welcome Email
- This message is sent to new members in an email after registering.
- Your club may wish to use a message like this:

    > Welcome to the **Edson Pickleball Club**. Thanks for joining, and don't hesitate to introduce yourself to others when you come out to play -- we're a friendly bunch!

- The corresponding PA message is:

    > **Pickleball Alberta** welcomes you! Your membership supports the growth of pickleball in Alberta and Canada. Check out our website for more information including places to play.

Renewal Email
- This message is sent to members in a renewal reminder email.
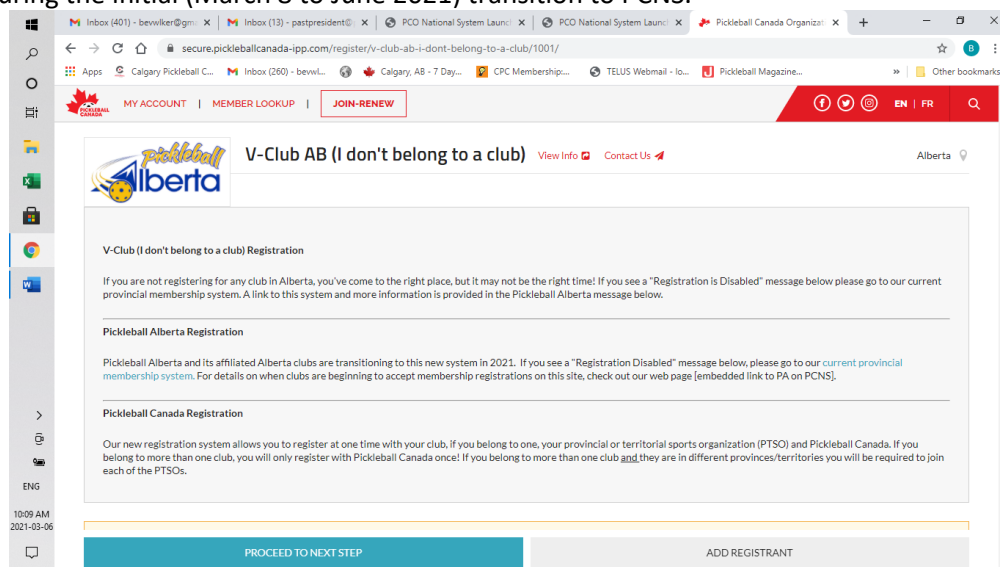- Your club may wish to use a message like this:

Your **Airdrie Pickleball Club** membership is expiring as described below. We hope you plan to stay active and connected with friends by renewing your membership.

- The corresponding PA message is:

    Your **Pickleball Alberta** membership is expiring December 31, like your Pickleball Canada and Alberta club memberships. Your memberships can be renewed as described for the Pickleball Canada renewal. We'd love to see you back with friends on our Alberta courts.

Registration Page

- This message will show up at the top of the club/PA/PCO registration/renewal page.
- In the Registration Page screenshot below you can see how the message for club, province and Pickleball Canada are all displayed. This example is for V-Club AB which is for individuals who join PA and PCO but not an Alberta club. You may wish to use a similar message for your club during the initial (March 8 to June 2021) transition to PCNS.

After the transition and when your club is ready to begin receiving registrations via PCNS, you may wish to use a message like the following:

Fort Saskatchewan Pickleball Association (FSPA) Registration

Please complete the registration pages below, then pay your membership fee for FSPA, Pickleball Alberta and Pickleball Canada. If you've already paid for any of these organizations for the current year, you won't be charged again, PROVIDED you re-use your current PCO membership record. LOOK UP YOUR CURRENT PCO MEMBERSHIP number and re-use it, as cautioned below in the message from Pickleball Alberta.

As in the example above, we suggest you put in a heading with your club's name in bold to follow the format set by Pickleball Canada.

As of January 8, 2022, the corresponding PA message for the Registration Page is as follows:

If you have been a member of Pickleball Alberta (PA) or any affiliated club in the past, or if your club has just become affiliated with PA, you have a PCO membership number. Please look up that number, and do NOT press the "I am a new member" button. If you press "I am a new member" you will create a new PCO membership record, duplicating your membership record and causing other problems for you and administrators.

To join a second or subsequent club, lookup your current PCO number. Do NOT create a new member record to join a second club. Your single membership record can have several clubs tied to it.

To save time renewing, log in first. Then, when you lookup or enter your PCO number, your registration form will be populated with your membership details.

Managing Groups

An administrator can set up a group or multiple groups in PCNS using the method described below. Once a group is established, an administrator can use regular member filtering to produce a list of members in that group and to send an email to group members.

Groups may be used by club administrators to manage different cohort groups, a play captain's group, a board members group, a 3.5 shootout group, and so on.

Note that maintaining a group this way is manual work by the assigned club administrator– there is no automatic registration into the group, for example. (Automatic registrations can be accomplished with member registration processes.)

Note also that all group members must already be members of your club. (PA is asking for additional PCNS functionality, in a future release, that would allow non-members to be part of a group.)
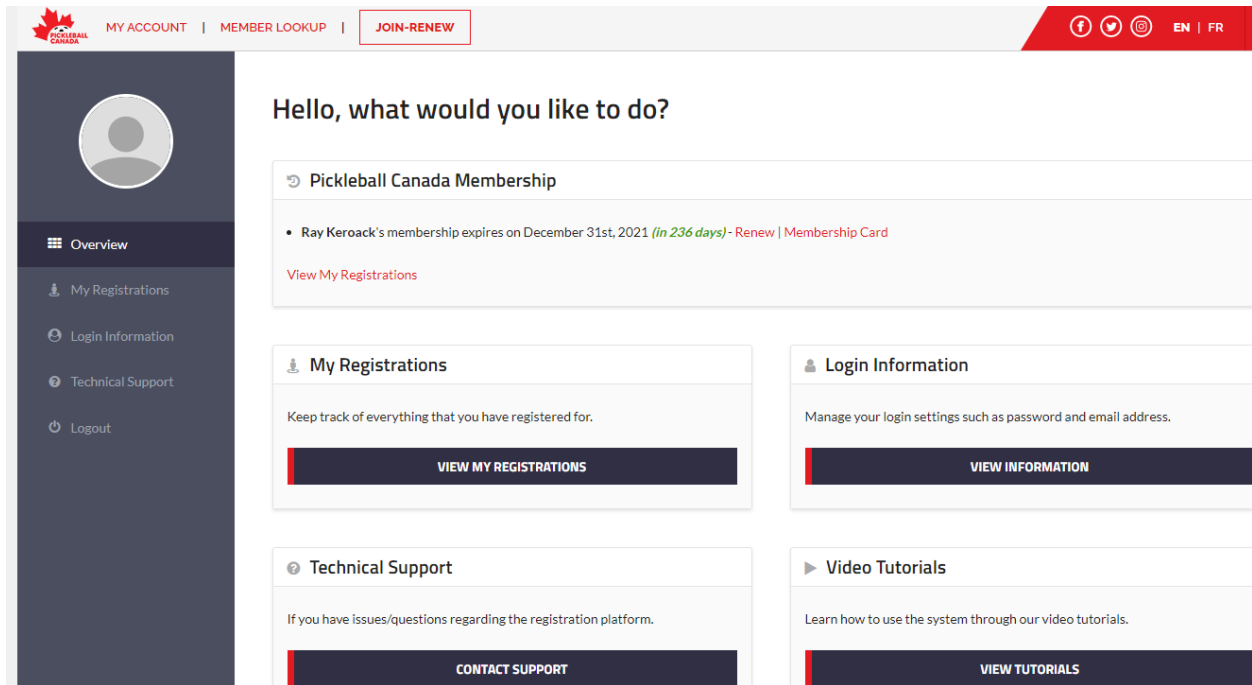
Here's the process:

1. Set up a field in the membership record using the "Manage Questions" settings described in Appendix D, Section 01.
    a. Call this "managed question" (aka field) something like "LPC Groups" or "EPC Groups", using the acronym for your club as the first three or four characters.
    b. Make it a check-box field type
    c. As check-box options, list every group you wish to create and manage for your club, such as Cohort-01-Grp, Cohort-02-Grp, 3.5-Shootout-Grp, Board-Grp, etc.
    d. Set the field to be visible and editable only by administrators
2. In each member record, check off the groups to which that member belongs.

In PCNS, there is currently no club or province-accessible import function, so it is not possible to export a membership list, quickly set memberships using a column of the exported spreadsheet, then import that sheet back into PCNS to update the groups.

Membership Management for Members

Here are some processes and tips members can use to manage their own registrations (memberships) on PCNS. In each of the following steps, it is assumed the member has already logged in and is at their Overview page.

Renew Membership

1. Either:
    a. Use the link in your renewal email, or
    b. Press the Renew link on your Overview page (see image above).
2. Edit any changed information on your registration form, review and accept waivers.
3. Proceed to confirmation and payment page.
4. Fill in the payment details. Billing details such as name, address, etc. should exactly match what is on the credit card and what the credit card company has on file for you.
5. Pay

Access Membership Card

1. Press Membership Card on the Overview page

View All Membership Details

1. On the Overview page, click View My Registrations. Here's what you will see next.

2. Click the head and shoulders icon before your name, in the most recent registration.

Edit Membership / Registration

1. On the Overview page, click View My Registrations
2. Click the blue edit (pencil) icon beside your most recent club/Pickleball Canada registration.

Change Home Club

1. On the Overview page, click View My Registrations.
2. Click the More Info (head and shoulders) icon before your name, in the most recent club/Pickleball Canada registration.
3. In the Membership Registration pop-up window, scroll down to Club Membership Information.
4. Click on the grey house icon in front of the club you wish to change to your home club. This will turn that icon green, indicating it is now the member's home club.

Website Management

Optional Ways to use your PCNS Club Website

Clubs can, optionally, set up and maintain their own web pages on PCNS, for no additional cost. This functionality, which can be used by large and small clubs alike, is called a Tier 1 website.

Large clubs with existing sites and multiple pages accessed through a menu system of two levels or more (e.g. with menus and sub-menus) may prefer to retain their own existing site, but still use the PCNS web functionality to both facilitate membership joins and renewals and to direct members to the club's existing website.

In the future, clubs may discuss with Trackie the cost for development of a more advanced Tier 2 or 3 website that would be integrated in PCNS.

Sample Club and Province PCNS Websites

Here are some examples of Tier 1 PCNS pages set up by some clubs and provincial associations.

Alberta	https://secure.pickleballcanada.org/club/pickleball-alberta/2/?admin=1
Edmonton	https://secure.pickleballcanada.org/club/edmonton-pickleball-club/1008/?admin=1
Lethbridge	https://secure.pickleballcanada.org/club/lethbridge-pickleball-club/1027/?admin=1
Regina	https://secure.pickleballcanada.org/club/pickleball-regina-inc/1211/?admin=1
Winnipeg West	https://secure.pickleballcanada.org/club/winnipeg-west-pickleball/1072/?admin=1
B.C.	https://secure.pickleballcanada.org/club/pickleball-bc/3/?admin=1
Manitoba	https://secure.pickleballcanada-org/club/pickleball-manitoba/4/?admin=1

Other club websites can also be accessed by going to the PCO/PCNS home page and pressing the **Find A Club** button shown in the following screen shot. (While a club is getting set up in PCNS they may decide to not have their club's name shown in this list until they are ready. See Appendix D – Club Configuration Settings and Appendix E – PCNS Settings for Clubs in Transition for more information on this setting.)
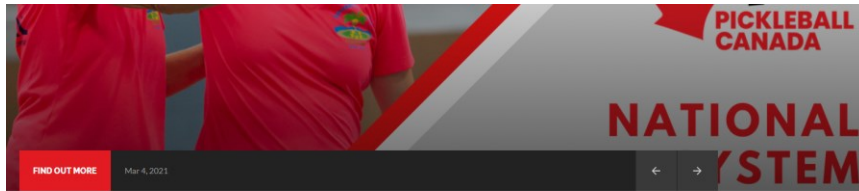
Getting Started with your Website Setup

By default, your initial club website will look something like this, if you look at it as an administrator.

If the public or your members were to look at this webpage, they would see something similar, but they wouldn't see the Admin Options on the left.

You will use these Admin Options to edit page details, add more content to the page, and customize the layout of the page, turning it into the page you want your members and the public to see.

Before getting into these details though, it helps to sketch out a "paper design" of your site. Determine how many pages you want and what type of content you'd like on each page. If you are new to this, you might want to start by designing only one page. On that one page, as a minimum, you may wish to:

- have an opening welcome message inviting members to join or renew their membership with your club, by pressing the Register or Join Now button on the page,

- reminding members that registration via PCNS is mandatory for any registrations or renewals after, say, June 15, 2021. The actual date will be set in collaboration with clubs later this spring.
- give potential members basic information on your club such as where you play during each season, whether this play is by drop-in or via some play registration, and how to register for play if applicable,
- let PCNS automatically display your Prices and Deadlines, per the sample above,
- display the Payment Methods (but we suggest you move this down the page, under Prices and Deadlines),
- add two or three short news articles, and
- tell members where to go for more information (e.g. direct them to your other website or Facebook page, or provide some club contacts and email addresses).

Website management is also referred to as content management. Web pages can contain various types of content such as links to other pages, links to documents, pictures, and videos.

At any point in the future, you can (and should regularly) update the content on your PCNS website. It can become one of the prime means you use to communicate with the public and members.

You do have the option of having some content (e.g. certain webpages) visible only to members. As well, any page or section of a page can be hidden from the public or members. You can, for example, set some content as hidden until you are finished developing it.

Using Web Page Tools (Admin Options)

The use of these tools is introduced in this video https://vimeo.com/421937575/fab55fbf63 and in the User Guide. Each of the tools is also discussed below.
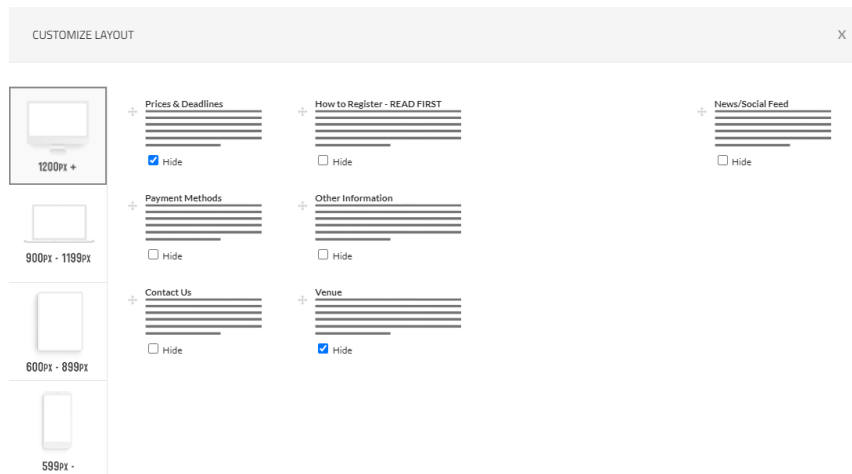
My Members

The *My Members* Admin Options button will take you to your main Members screen.

Edit Settings

Pressing this button will take you back to the settings page for your organization.

Customize Layout

Pressing this button take you to a screen like the following:

Down the left-hand side are different screen sizes. Press each one to see, on the right side, the layout of your articles when viewed on a device corresponding to these screen sizes.

- "1200PX +" refers to a pc monitor with a screen width of at least 1200 pixels
- "900PX – 1199PX" refers to a screen, such an ipad in landscape mode, with a width between 900 and 1199 pixels.
- "600PX – 899PX" refers to a screen, such as an ipad in portrait mode, with the stated width, and
- "599PX -" refers to a screen, such as a smart phone in portrait mode, with the stated width.

Click through each of the four screen size choices and decide the layout of your articles for that particular screen size.

In each layout option, articles can be dragged to a different location using the "+" sign to the left of that article. It is a good idea to place those articles a reader might need or want to see above those that are less critical.

An article can be hidden by selecting the "Hide" option for that article.

Note that in the screen shot above, there are no articles in the third column of the layout. When you pick this layout, PCNS may stretch your second column articles to fill both the second and third column of the layout template. This is a good way to give those articles prominence.

Do not leave the left column empty. In fact, the left-hand column needs to be longer than the right-hand column. If this is not the case, PCNS will add an inordinate amount of white space below your articles and above the top of the web page footer.

Press "Save and Close" before leaving this screen.

This "Customize Layout" feature is only applicable to your club's home page. Other pages you build can only have:

1. A single article spanning nearly the width of the screen, and/or
2. A photo or photo gallery.

The single article can contain text of various formats, tables, links, images, videos, and embedded files. The article can also be as long as needed.

Additional Content

Pressing the "Additional Content" Admin option brings up a panel like the following:
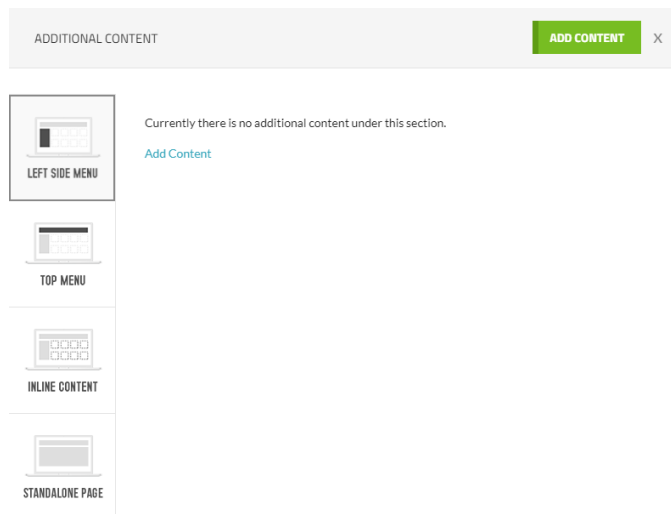
Press "Left Side Menu" to create a menu that will appear on the left-hand side of your club web pages, and to optionally create sub-menus. For each menu or submenu item, separate content articles or pages can be created. Note that for the left side menu, sub-menus items are not collapsed and are always visible

Press "Top Menu" to create a menu that will appear at the top of your club's webpages, along with sub-menus, pages and articles. For top menu items, the sub-menus are collapsed and not visible until the user presses or hovers over the menu item.

Press "Inline Content" to add another article to your club's home page. You may add as many articles as you like on this home page. After you've added as many articles as you'd like, use the previously described "Customize Layout" to position them in the columns and in the order you'd like them to appear on the home page.

Press "Standalone Page" to create a webpage that will not be accessed by selecting a menu item. This may be useful, for example, it you want to provide information that can only be accessed by clicking a link on another page.

The use of the Left Side Menu and Top Menu are further explained below in *Create a Website*.

Create a Website

In this section, it is assumed you have already:

- decided on menu names, submenu names and the content, such as information and images, that you'd like on each page,

- decided to put some menu items on the left side of your club pages, to take advantage of the built-in "Home" button PCNS puts at the top of left-hand menu.
- decided specifically to have a left-side menu and sub-menu like the following:

> Home
> About Us
>> About Us (an introduction)
>> History
>> Mission, Vision, Values
>> Contacts

- decided to have a top menu and submenus like the following

> Explore Joining
>> Explore Joining (an introduction)
>> New Member's FAQ
>> Beginner's Lessons
> Play
>> Play (an introduction)
>> Play and Member FAQ
>> Play Types
>> Reserved Play
>> Member's Handbook
>> Outside Resources
> Development
>> Development (an introduction)
>> Mentoring
>> Skill Levels and Ratings
> Club Mgmt
>> Club Management (an introduction)
>> Captains
>> Plans, Policies and Bylaws
>> Meetings
>> Team Mandates and Job Descriptions
> Members (for content that will be restricted to registrants)
>> Members (an introduction)
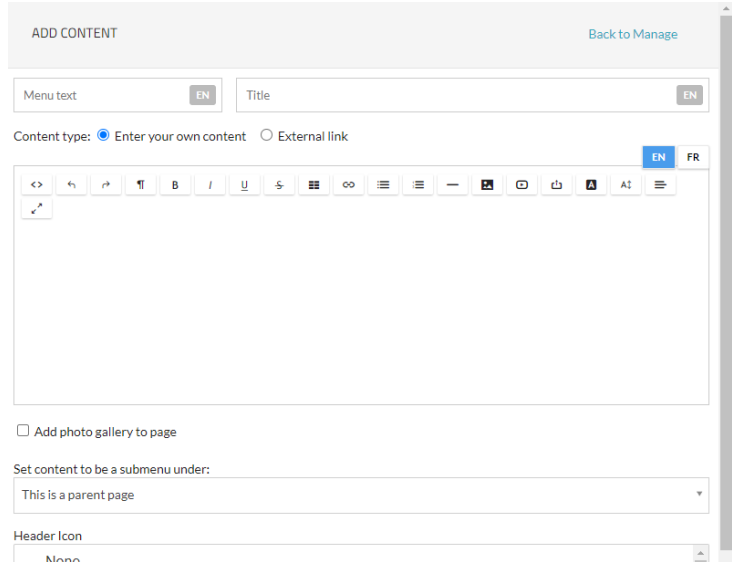>> Teams and Committees
>> Member Survey

The following sections contain the steps to take to start building this menu structure and content. You will notice a pattern in the following sections:

- first, the main[2] menu item and the first page (introduction page) are built together,
- then, each of the additional submenu items and the content for the sub-menu page are built.
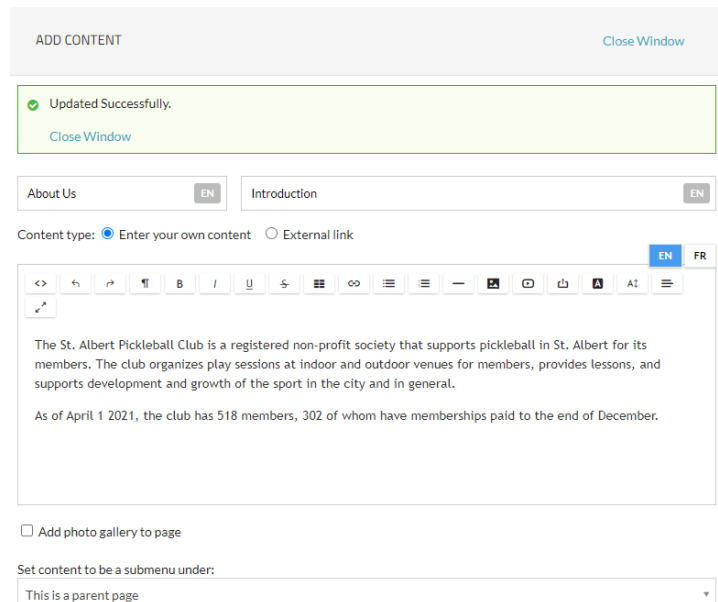
---

[2] This description of the "main menu item" applies to both Top Menu items and Left Side Menu items.

Build the About Us Menu and Introduction Page

1. In the Additional Content panel, select "Left Side Menu"
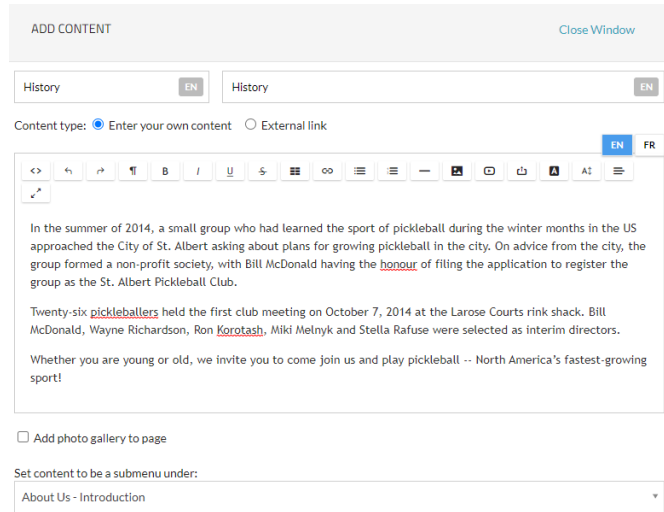2. Click Add Content to get to a panel like this:

3. In the Menu text box, type "About Us"
4. In the Title box, type "Introduction"
5. In the content area, add your content for the Introduction page. Use the format button (the one just before the B (bold) button) to format the text as normal text if needed.
6. Leave the 'Set content…' box to "This is a parent page".

7. Scroll down and click the Update button. Close the Add Content window to see your results.

Build the History Submenu and Page

1. Press "Home" from the left-hand menu, then the Additional Content button from the Admin Options, then the Left Side Menu.
2. Click "(+) Add submenu"
3. Enter content like the following. Note that the "Set content to be a submenu under:" is filled with 'About Us – Introduction'.
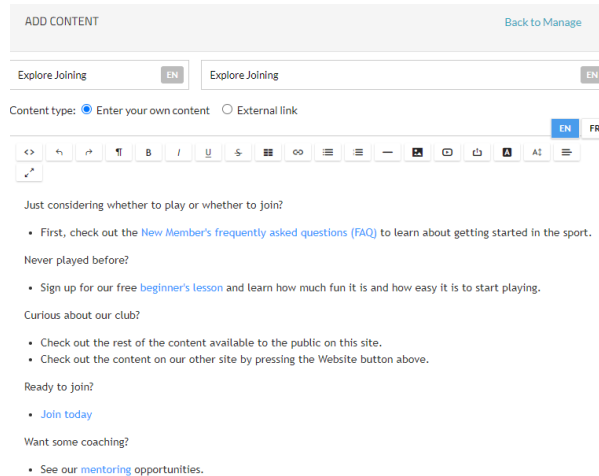

4. Scroll down and click Update to save your content.

You should now have the beginning of a left side menu that looks like this:
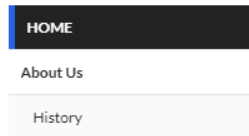
Build Explore Joining Top Menu and Build a Link

1. In the Additional Content panel, select "Top Menu"
2. Click Add Content to get to an Add Content panel.
3. Enter content like this:

4. Note that the blue text in this example are links to pages on another website.
   a. To build links like this to pages within your site or on another site, do this:
      i. open the page you want to the link to go to in another browser page and copy the url (web address) for that webpage to your clip board
      ii. back inside the Add Content panel for your page, select the text that is to be turned into a link,
      iii. press the link icon (looks like an infinity symbol or chain link)
      iv. paste the url into the URL box
      v. if the link is to another site, select the "open link in new tab" option
      vi. click save
   b. To edit a link that is already made
      i. select the entire link in the Add Content panel so it is highlighted
      ii. hover over the link and pick "Edit" from the popup
      iii. make the needed changes and click Save
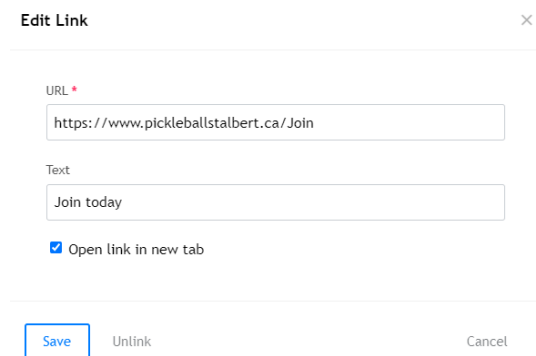
5. In the "Set content to be a submenu under:" box select "This is a parent page."
6. click Update

Build the New Member's FAQ Submenu

1. Press "Home" from the left-hand menu, then the Additional Content button from the Admin Options, then Top Menu.
2. Click "(+) Add submenu"

3. Enter content like the following. Note that the "Set content to be a submenu under:" is filled with 'Explore Joining – Explore Joining'.

4. Press Update to save your changes.

Email Management

PCNS can be used to send club emails to all club members or to some filtered set of members. PCNS also automatically sends emails to members when registrations require renewals, when registrations have been completed, when goods have been ordered, etc.

A 57-minute video of a Zoom webinar showing how club administrators can use PCNS to select and email members is available here: https://drive.google.com/file/d/1s_-fTw13fvqJBYy0IP3xaZRoo3dCwEHc/view

Getting Started with an Email

There are two main ways to trigger mass emails (such as newsletters) to your members or to a selected group of members. One way is to start with a filtered list of members (e.g. all active club members or all members with a specific club rating) and the other is to start with the "Mass Email" button at the top of My Members page. The specific steps for these two alternatives are as follows.

Starting with a Filtered Membership List (Preferred)

1. Log in to PCNS as a club administrator.
2. Go to your club's My Members page.
3. Apply filters to your My Members list to produce the subset of members you wish to email. See Membership Management for Administrators to learn about applying filters. Check off the names of members to be emailed or select "Check All".
4. Press the "Email" link at the top of the filtered members list, as shown in this partial screenshot:
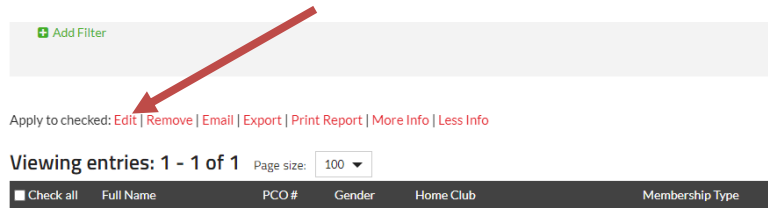
After pressing the Edit link you will see a panel like this (below). All the names you've selected in step 3 will have been added to the "Send to:" box. Note that the "Customized List" option will also be preselected for you.
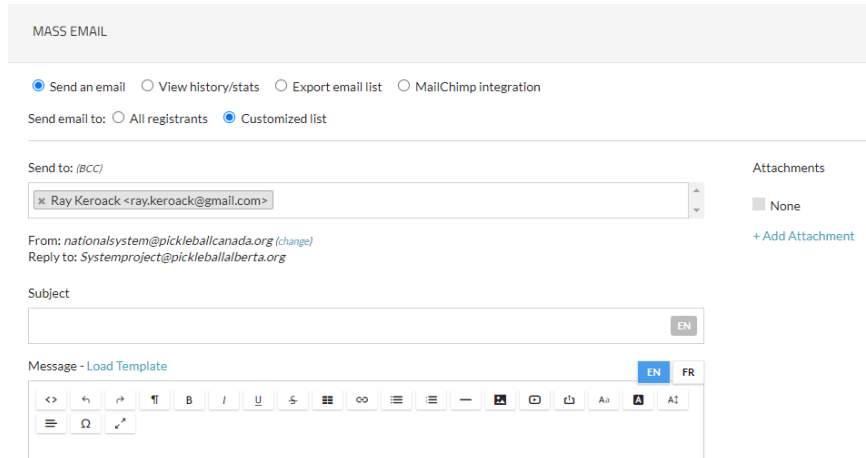
Starting with the Mass Email Button

1. Log in as an Administrator
2. Go to your club's My Members page.
3. Click on the Mass Email button as shown in this partial screenshot:
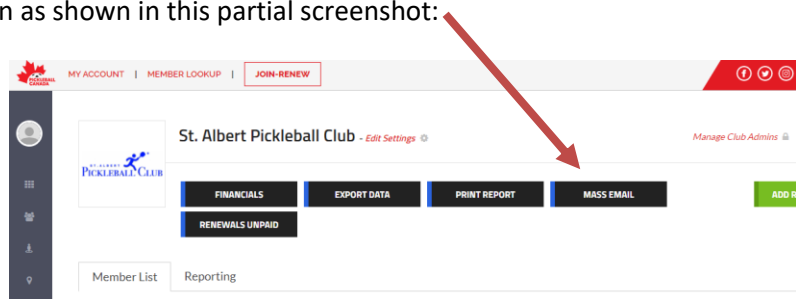
After clicking the Mass Email button, you will see this panel.

Note that the "All Registrants" option is preselected. It is unlikely that you want to email all registrations including lapsed or expired members, so be careful about using this method of starting a mass email.

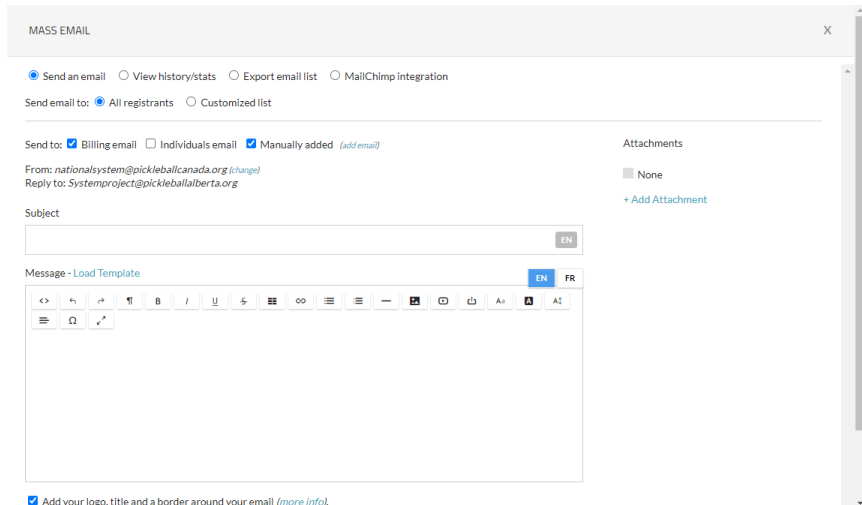4. Choose whether you want to send to registrants Billing email and/or Individuals' email. (If a member had their membership fee paid, say, by someone else in their household, they wouldn't get an email that went only to the Billing email addresses.)
5. If desired, manually add other emails (e.g. for non-registrants).

Creating a Basic Email

1. Use one of the two methods, described above, to get to the Mass Email panel and determine the recipients of the email.
2. Fill in the subject of the email.
3. Type (or paste in) and edit your email message. Format as needed, and insert images, links, videos, or files using the toolbar tools.
4. If desired, add attachments.
5. If desired, check the "Add your logo, title and a border around your email" option.
6. Scroll down the panel to see the bottom buttons.

7. If desired, click "Preview" and/or click "Send a Test Email" and complete the steps to do that.
8. Click Send Email.

Mass Email Panel Options

Reply To

The "Reply To" is automatically set to your administrator's email address.

Changing Sender's Email

1. In the Mass Email panel, click the "Change" link after the "From" email address.
2. Fill in the Change Senders Email panel. This information is needed to comply with Canadian anti-spam laws.


3. After clicking "Submit" you will get an email that will have to be forwarded to Trackie to verify your ownership of that email address.
4. After Trackie's verification, you will be able to use this alternative Sender's email.

Using an Email or Newsletter Template

If desired, <u>before</u> typing your message body, click the Load Template link at the top of the message box, then:

> ➢ select a pre-existing template,
> ➢ select a template you previously saved, or
> ➢ select a message (email) you previously sent.

Here's a partial screen shot showing these options.
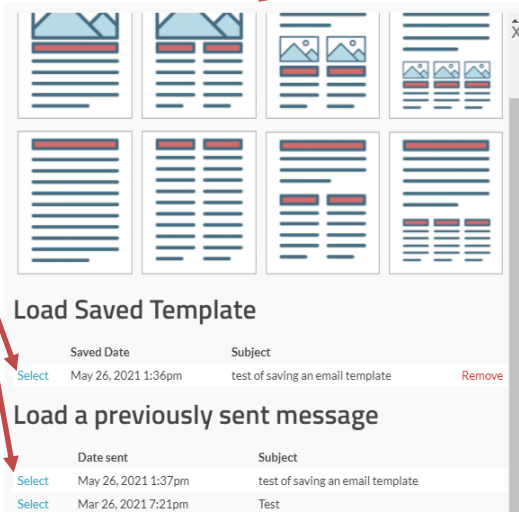
Click on any images in your template to replace them with images you choose.

Continue to edit any text the template added to your message body.
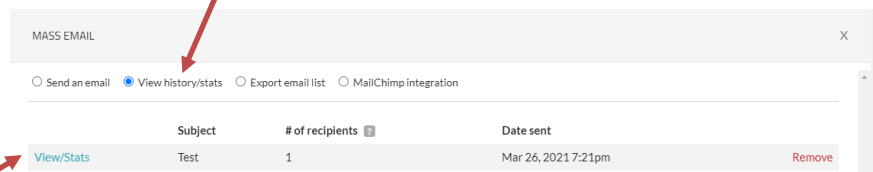
Creating a Template

Click the Save as Template button at the bottom of the Mass Email panel. (After clicking this button, it appears one must also send the email to have it saved as a template.)

Viewing History/Statistics

In the Mass Email panel, click View history/stats.

Click the View/Stats link in front of any email sent to see a panel like this:
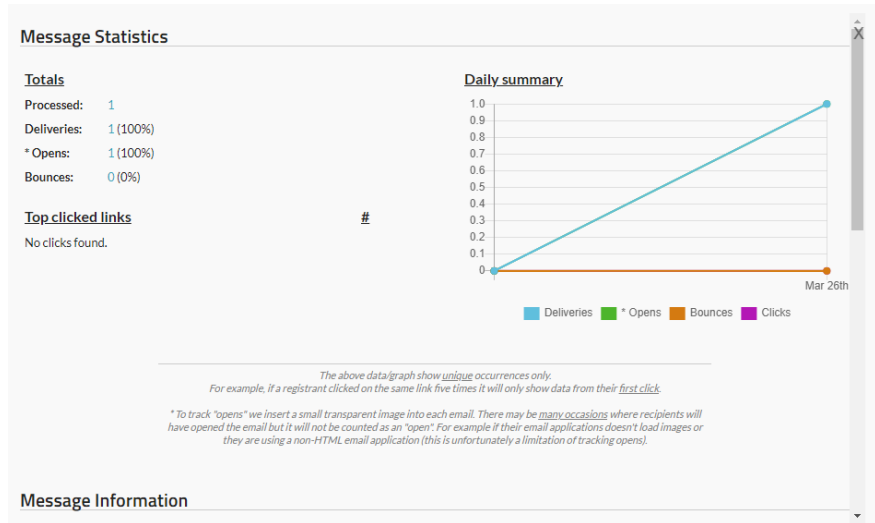
Unsubscribing to Emails

Members and administrators can edit a member's profile to unsubscribe or "opt out" of mass emails, as shown in this partial panel of a member's Edit Information panel.

By default, members are opted in unless they uncheck this option.

A member can also opt out by selecting an unsubscribe option from the bottom of any mass emails they receive. A member will have a choice to:

➢ unsubscribe from club mass emails, at the bottom of a club email,
➢ unsubscribe from Pickleball Alberta emails, at the bottom of a PA email,
➢ unsubscribe from Pickleball Canada emails, at the bottom of a PCO email, or
➢ unsubscribe from all such emails at once.

Members will continue to get membership renewal reminders, receipts and other system-generated emails needed to sustain core membership administration.

Places to Play Management

Administrators may enter and update the PCNS Places to Play. The pubic can use the PCO's website to find these places to play, and this can help direct potential members to your club.

To edit Places to Play, press "Manage Places to Play" on your administrator's overview panel.

Administrators can also delegate responsibility for maintaining the information on a particular place to anyone, even someone who is not a PCNS member or administrator.

To have an obsolete "Places to Play" place removed from PCNS, email a PA Administrator.

Financial Management

Costs

Each payment a member makes via PCNS is assessed a processing fee of 50 cents plus 4.9% of the base fee. GST is then added to the processing fee. This fee covers both the credit card processing fee (charged by the credit card company) and the costs incurred by Trackie to develop and maintain the system.

For examples of the processing fee calculation and display, see the Processing Fee setting of Appendix D – Club Configuration Settings > Section 04: Payment & Deadlines.

If a member pays for multiple family members at once, the 50 cents and 4.9% and GST are applied to each member.

There is also a fee of $1.25 for each withdrawal a club makes to transfer funds to their club bank account.

There is no additional cost to have a Tier 1 website on PCNS.

Commencing in 2022, PCO will start building a small financial reserve to cover future systems developments (such as the development of a system interface between a rating system and PCNS) and unforeseen systems-related costs. PCO will establish an annual contribution for PTSOs and Clubs based on their membership size. This contribution is being finalized in consultation with PTSOs. The annual contribution for 2022 is proposed as follows:

PTSO Systems Development Contributions

PTSO Size	Contribution	Note
> 4000 Members	$3000/year (this applies to PA)	currently 3 provinces (including Alberta)
2,001 to 4,000 Members	$1500/year	currently 2 provinces
0 to 2,000 Members	$0 (free)	currently 7 PTSOs

Club Systems Development Contributions

Club Size	Contribution	Note -- based on 2020 data
> 500 Members	$200/year	approx 10% of clubs
201-500 Members	$100/year	approx 10% of clubs
0 to 200 Members	$0 (free)	approx 80% of clubs

Viewing and Exporting Payment Information

To get to the Financials screen:
- Log in. Go to Overview > click on View My Members
- click on the Financials button, as shown in the next screenshot.
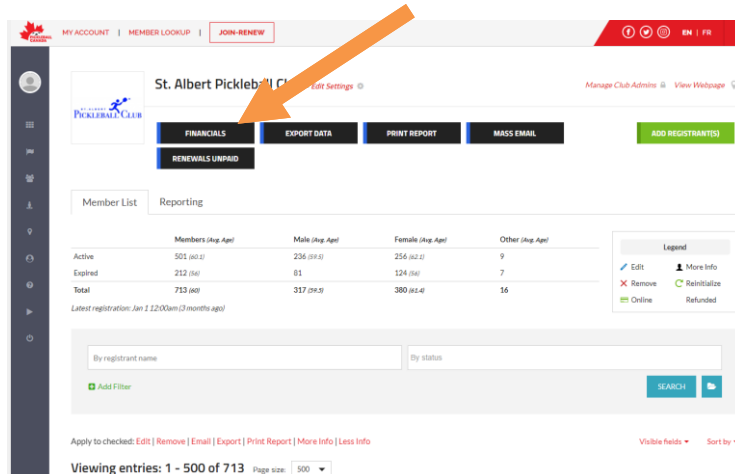
On the Reporting tab you will see the financial graph of revenues. To the right of the graph, you will see a Date Range box.

- Click the down arrow in the Date Range box and pick the range, year or month of the financial information you'd like to see or report.
- Click the green "Go" button.
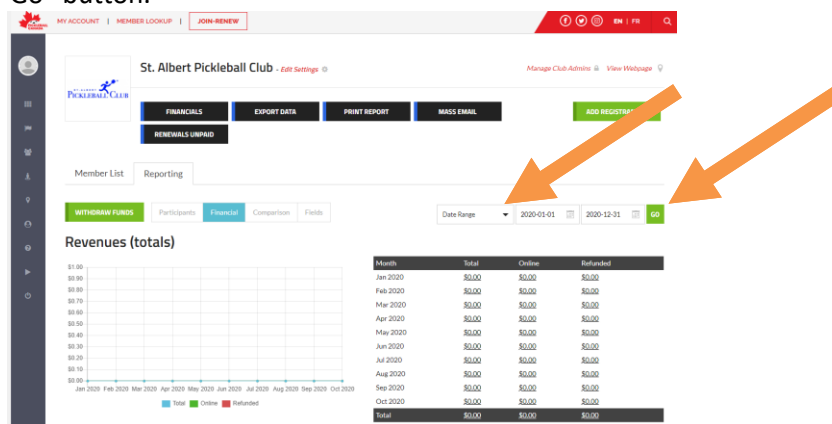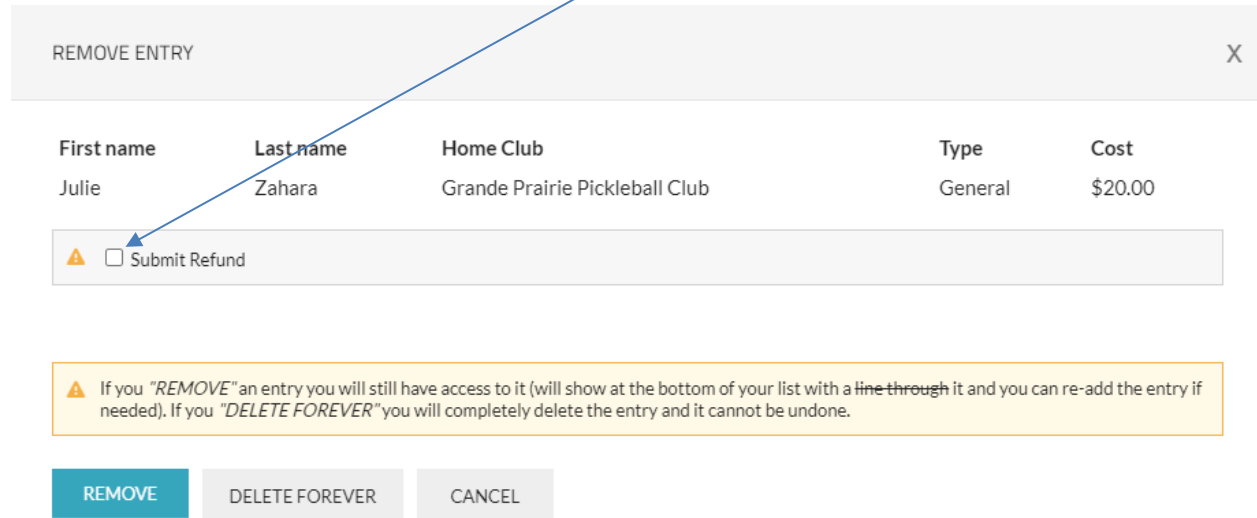
- Below the date range selection, click an underlined value in the Total, Online or Refunded column. This is a link that will take you to the underlying transactions for the month.
  - You can alternatively click on an amount in the total row.
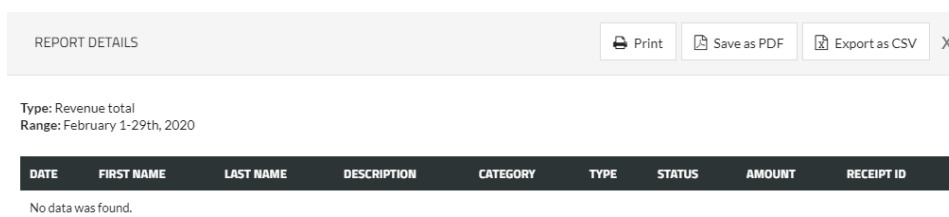
- You will then see the above Report Details panel listing the transactions for the period. View the transactions or click the Print, Save as PDF, or Export as CSV option.
  - The latter option, Export as CSV, will produce a file that can be imported into Microsoft Excel, and that can then be further formatted, filtered, analyzed and printed.

Refunding Payments

To post a refund, click the red X icon to the left of a member's name and then, within the popup window (shown below), click the "Submit Refund" checkbox.

Clubs can only refund the club portion of a member's membership payment. Refunds are not available for Pickleball Canada or Pickleball Alberta membership fees.

PCNS will credit the same credit card used during the purchase.

Only full refunds are available initially. Partial refund functionality will be added later.

Funds Transfers

The Withdraw function enables clubs to transfer their available funds, collected via PCNS, to their club bank account.

- Administrators with access to Reports can initiate a withdrawal.
- Administrators with "Club Settings" access can the bank account details.

To withdraw funds:
- proceed to the Financials screen
- press Reporting tab if it is not already selected
- press the green "Withdraw Funds" button.
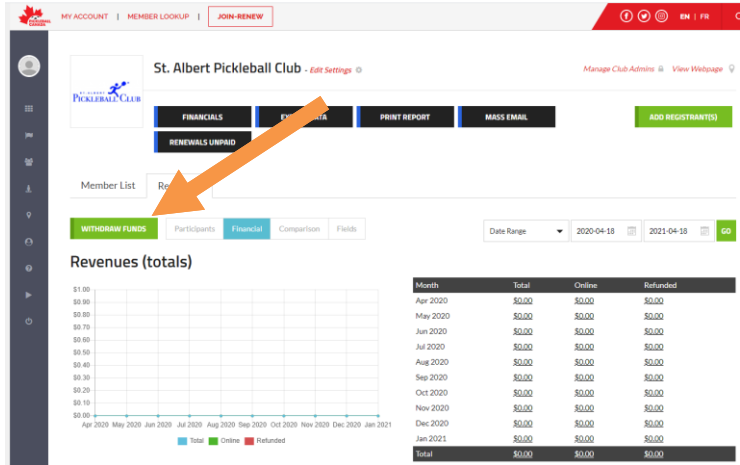
- click the Transfer button on the next screen.

If you wish to automate these transfers, click the Settings button, select the "Trigger withdraws automatically" option, pick Monthly, Bi-weekly or Weekly, and press Update. Weekly withdrawals take place on Mondays. Monthly withdrawals take place at the end of the month after the last receipt for the month.

Implementation Considerations

Communication to Members

As part of the implementation, clubs can email members advising them how to initially get to the PCNS site and set up a new password. Below is sample communication for club consideration.

Hello Pickleballers

Your _____ Pickleball Club is very excited to now be accepting renewals and new member registrations using the new Pickleball Canada National System (PCNS).

With this one system, you can pay club, Pickleball Alberta and Pickleball Canada (PCO) fees at once, and you can then join additional clubs in Alberta without again paying your provincial and national association fees.

Note that your club fees previously included your membership fees for Pickleball Alberta and Pickleball Canada. These fees are now shown separately in PCNS.

This system will save many hours of membership administration at all levels, and it will be further developed in the months ahead to provide event booking and to sell club goods and services.

Membership Registration Instructions

Existing Members
1. Go to www.pickleballcanada.org

2. Click on "Login" at the top of the page, enter your email address, and click on "Forgot Password". You will then get a password reset email. Check your spam folder if this email does not arrive within ten minutes. Reset your password as directed in the email and login.

3. If your membership has lapsed or will lapse within 90 days, renew your membership. On your PCNS Overview page, press the Renew link to initiate this process.
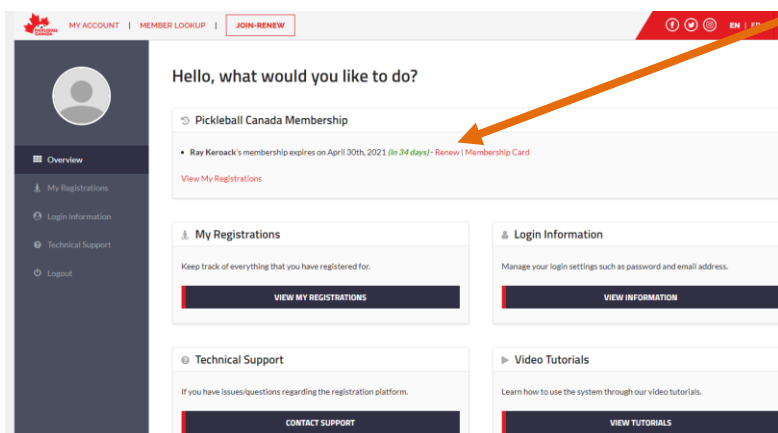
New Prospective Members

1. Go to www.pickleballcanada.org and click the JOIN-RENEW button, and on the next webpage click the JOIN button.

2. Choose Alberta and then _____ Pickleball Club.

(If your club has an enabled website on PCNS, prospective members are directed to that site by the above step. In this case, add this step 3 and renumber the following steps. If your club doesn't have an enabled website on PCNS, delete this step: "3. Note any critical messages on our club webpage on PCNS, then press the JOIN CLUB button in the menu near the top of the page.")

3. On the left, halfway down the page it says 'Are you a new or renewing member?

    a. If you have never been a PCO member, or were last a member prior to 2019, pick the "I am new to Pickleball Canada" option.

    b. If you have previously been a PCO member, click the "I am renewing…" option and then pick LOOKUP MEMBERSHIP. The system should find your membership if that membership was in 2019 or later. (This is important if you or your club need you to retain and re-use your previous PCO membership number.)

4. Fill in or update the required information and proceed to the payment step.

Thank you
The _____ Pickleball Club

PCNC Implementation History

PCNS was implemented in Alberta in 2021. Pickleball Alberta, in collaboration with Alberta affiliated clubs, Pickleball Canada and the PCNS developer, Trackie Inc., worked over several months to convert and import membership data, train club administrators and get clubs setup on PCNS, communicate with members, and build on-going support services and resources.

Ongoing Administration

Club and Pickleball Alberta Administration

When	What	Why
Before Oct 1 each year	Set new club/PA memberships price for next calendar year	Memberships for the new year can be purchased as early as Oct 1 the prior year
As often as desired	Withdraw funds (transferring them to club/PA bank account) and download monthly revenue report	To receive and record membership revenue
As needed	Maintain / train administrators	
As needed	Maintain club/PA PCNS webpages (including V-Club page for PA)	
As needed	Adjust other settings	

Other Pickleball Alberta Administration

When	What	Why
Sep 1 each year	Remind clubs to set new membership price by Oct 1	Memberships for the new year can be purchased as early as Oct 1 the prior year
Feb 1 and Nov 1 each year	Review members of V-Club AB. If anyone is also a member of another club, remove their V-Club membership and set their Home Club to the other club.	Members may intentionally or inadvertently join V-Club, then later join a specific club. V-Club members will get a renewal notice Dec 1, but there is no need for them to get a V-Club notice or to renew their V-Club membership if they have become a member of another club in the province. (Note: PCNS may do this automatically in future, eliminating the need to do this manually.)
After consulting with clubs mentioned	Eliminate the PA Club Rating field	This field was temporarily established to allow Calgary, Red Deer, Barrhead and Parkland to carry over the club ratings they formerly stored in PAWA. These clubs should soon move this information to their own club rating fields before PA removes the PA Club Rating field.

Appendix A – FAQ

Plans and Timing

Question	Response
1. When was PCNS launched and ready for implementation by the first set of provinces and clubs?	March 8, 2021.
2. When did Alberta implement PCNS?	Affiliated clubs were asked to work with PA to get ready for implementation from February through April, in preparation for a June, 2021 launch. Integrated clubs in particular were asked to work with PA on this as PAWA was taken out of service as of the June launch.

PCNS Setup and Configuration

Question	Response
1. If some Alberta clubs are ready to collect fees through PCNS but others are not, how do we inactivate or remove the option to join these clubs not yet ready for PCNS use?	Clubs can be removed from the "Join Now" pop-up club list by setting "Hide on Pickleball Canada" to "Yes". This setting is described in Appendix D, Section 01: General Information > Advanced Options. This step must be done by a PA provincial administrator or club administrator.

PCNS General Use

Question	Response
1. How do I return to the Overview dashboard (Home button takes one to the PCO home page, not Overview).	Click "MY ACCOUNT" in the top left of the event page. Must log in first.
2. Is there a smart phone app for PCNS, and is it mobile friendly?	No app, but PCNS can be accessed on a phone via internet browser and is mobile friendly.

Club Finder

Question: How can I get my club to show up in Club Finder, or My Club shows up – why doesn't it have a link to a webpage?
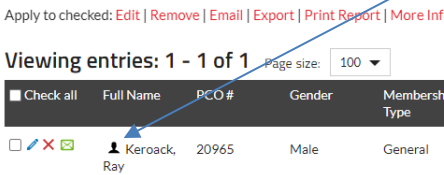
Answer: Appendix D of this guide describes different settings a club administrator can control. The table after this next PCNS Home Page screen shot shows which settings affect the appearance of a club in the Club Finder.
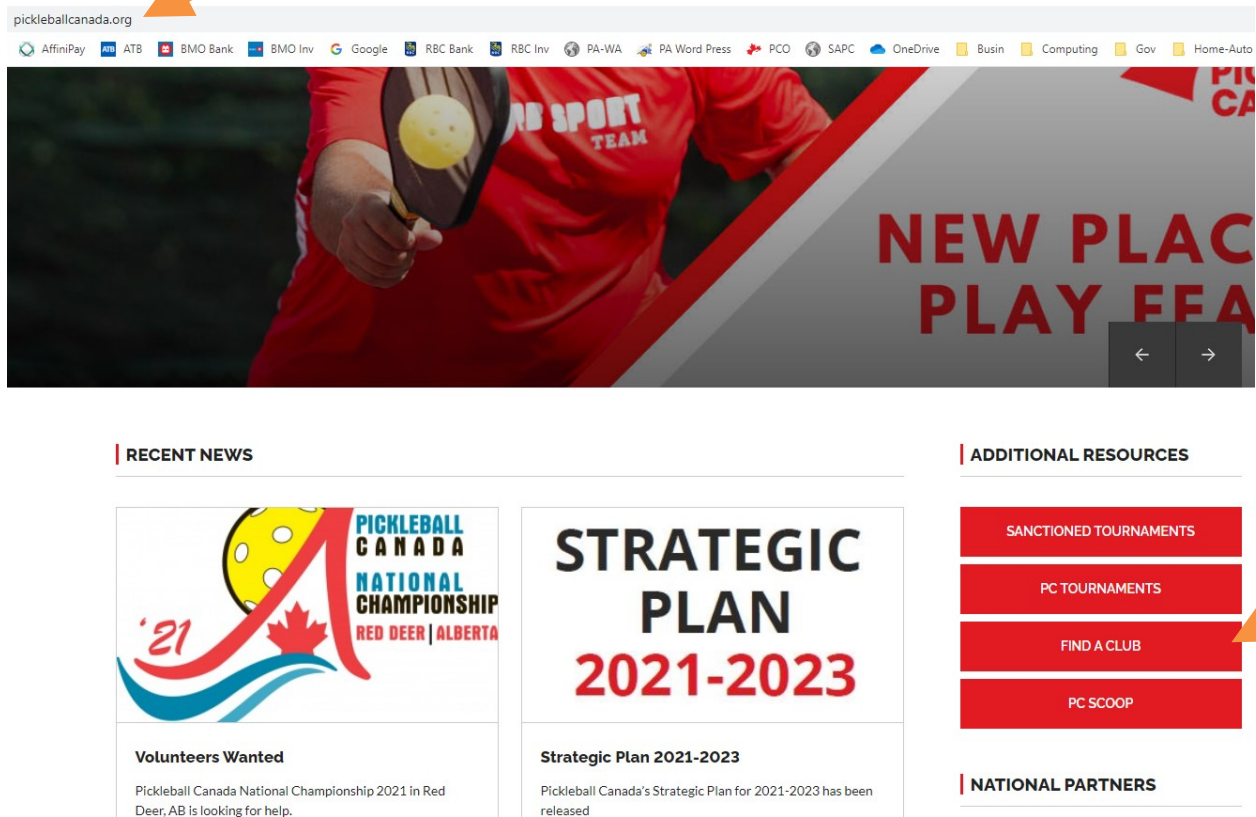
"Hide on Pickleball Canada" Setting	"Disable Public Webpage" Setting	External Website Setting	Result
Yes	n/a	n/a	Club will not show up in "Find A Club"
No	Yes	blank	Club shows up, but without a link to anything.
No	Yes	has a URL to Club's other website	Club shows up with a link to External Website
No	No	n/a (blank or URL)	Club shows up in "Find A Club" with link to Club's PCNS web page.

PCNS Membership Management

Question	Response
1. Is there an ability to restrict membership	Not automatically, but it is possible to limit memberships in two ways:

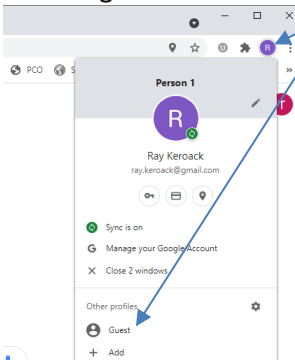| Question	Response
based on city or province?	1. Set up an access code using the Section 01: General Information > Advanced Options settings, and only provide that access code to members who meet your club's membership criteria. 2. In Section 01: General Information > Advanced Settings, set "Manually Approve Entries" to Yes. (We understand this requires an administrator to monitor their email and manually approve (or reject) each registration request that comes in, however Pickleball Alberta has not tested this feature and cannot yet confirm how it works.)
3. Is there an import capability for selected fields such as club rating	No. (If Alberta clubs see this as an impediment to using PCNS, please let PA know so PA can re-raise this issue with PCO and Trackie. We could have this matter escalated so it becomes a priority for future system enhancements.) Note that Trackie is doing one-time imports from club data into PCNS as part of the initial implementation (and all existing club ratings in PAWA are being added that way, for example), but future editing of club ratings would have to be done by editing each member record one at a time.
4. Is there a way to capture prospective member information, before and without them yet becoming full (paid) members?	Yes, a club admin can set up an "event" that could collect information such as this, when the event management module is implemented.
5. How does a member change their personal information?	Member logs in, then goes to "my Registrations" page > click "More Info" button > click Edit icon to the left of one of their registrations.
6. Does PCNS track "last export" by administrator?	Yes. If using this export option, the "since last export" will give you membership records added or updated since your personal Admin ID performed an export.

7. If a member is a member of two clubs:
  a. Will both clubs be able to see that member's record?
  b. Will both clubs be able to edit that record?
  c. Will one club be able to see the other clubs to which a member belongs?
	a) Yes
	b) Yes (Trackie can look into changing this if directed)
	c) Yes. Click the head and shoulders icon within the membership record and scroll down in the popup window.
	
	Apply to checked: Edit | Remove | Email | Export | Print Report | More Inf
	
	Viewing entries: 1 - 1 of 1 Page size: 100
	
	☐ Check all Full Name PCO # Gender Membership Type
	
	☐ ✏ ✕ ✉ 👤 Keroack, Ray 20965 Male General

Question	Response
8. Can clubs have their membership fees prorated, based on the number of months or weeks left in the year?	Yes. See 6.2.4.1 of the User Guide (draft 3).
9. Will membership records be kept indefinitely, even though memberships have expired?	PCO is considering a business rule which would delete expired membership records two years after expiry to comply with protection of privacy legislation.

PCNS Website Management

Question	Response
1. Please describe the different types of web site functionality offered by Trackie, such as Tier 2 and Tier 3 levels of website support and creation.	Trackie is happy to discuss this with a PTSO or club, on an individual basis. Costs will depend on what a PTSO/club wants. Trackie cannot start working on this until after the launch of PCNS.
2. Does the layout of a PCNS club webpage auto format for the mobile phone screen?	Yes, Tier 1 web pages are web friendly. Log in as an administrator and go to your club webpage. One the left side under Admin Options you can click "Customize Layout". On the left side of the popup there are buttons for different display resolutions which can be used to customize the layout for certain resolutions. See the Website Management > Using Web Page Tools > Customize Layout section of this guide for further details.

Question	Response

3. How can I be editing my club's PCNS web page in one window and quickly see the results, as a non-administrator would see them, in another window on my computer?	Use Google Chrome as your web browser.
	1. Open and log into PCNS in one window.
	2. Open a second Google Chrome window (not tab), then:
	   a. click on your ID icon in the top right
	   b. Select "Guest" profile
	   c. go to PCNS website https://pickleballcanada.org/
	
	Note: if you'd like to see your club's website as a regular club member (non-administrator) would see it, log into the Guest window's PCNS site with a regular member's ID. (This is one reason to have a separate administrator email address and ID from your regular member email address and ID.)

PCNS Email Functionality

Question	Response
1. Is there a cc or bcc function?	No, but all recipients are effectively bcc'd as they cannot see other recipient's email addresses.
2. Is there a limit on the number of emails that can be issued, or the speed of email issuance, to avoid mail being designated as spam by servers like gmail.com?	No, but the volume of email may be monitored, and steps taken if this risk becomes evident.
3. In the creation of emails, can we have member names or membership expiry date added automatically to outgoing	The plan is to eventually add custom variables that can be used via the email system, but this is a lower priority at this time.

Question	Response
emails, by setting up variables for these fields?	
4. IF a member opts out of receiving emails, will they still get a renewal notice and receipts?	Yes. The opt out only pertains to mass emails.
5. When PCNS sends out an email from a club to its members, what is the sender's email address, as viewed by the member?	For emails from a club, the default is "noreply@pickleballcanada.org", but the "reply to" email is set to the person who actually sent the email. When PCNS sends out automated emails, they may appear to come from Sendgrid.com or @trackie.com. https://Sendgrid.com is the email provider used by Trackie, the PCNS developer.
6. Do email recipients see other recipient's information?	No. Basically all recipients are bcc'd.
7. Automated emails from PCNS are not getting to their intended recipients. E.g. some administrators are not getting an email from PCNS when they are first set up as administrators. What might be causing this?	The first thing to check is whether the missing mail is in the recipient's junk mail folder or trash/deleted mail folder. If not, it is possible that some intermediary mail handler, such as the recipient's internet or email provider, is considering the messages as spam and is blocking the messages. We have found, for example, that the path being taken for email from PCNS to @calgarypickleballclub.ca was as follows: - PCNS issues automated email via SendGrid (Trackie's emailing platform) - Sendgrid (wrqvxtbn.outbound-mail.sendgrid.net) forwards the email to Stormweb Canadian web hosting, the company hosting the @calgarypickleballclub.ca domain. - Stormweb uses SpamCop to filter spam email. - SpamCop's automated program determined the SendGrid's emails were spam and "blacklisted" them, so Stormweb didn't pass the email on to @calgarypickleballclub.ca The remedy required that a request be sent by Trackie, via SendGrid, to https://www.spamcop.net/bl.shtml?149.72.167.178, asking SpamCop to delist the email-issuing server (sendgrid.net) from SpamCop's blacklist. If you have a problem similar to this, we do not expect Alberta clubs to solve it directly. Please engage Pickleball Alberta's technology team to coordinate the resolution of such problems for you.

Current and Future PCNS Functionality

Question	Response
1. Besides membership management and website management, what additional functionality is now available in PCNS?	As of May 2021, PCNS can also ● process full refunds of club fees (partial refunds to come in future) ● manages Canada-wide Places to Play ● produces membership cards
2. What functionality will be added in future releases of PCNS?	● Market place for goods sales (to be made available through main menu, not just with membership sales) ● Event management should be available late in 2021. ● Partial refunds ● Ability for PTSOs/ clubs to use a batch upload to update a PTSO or club field (e.g. a club rating field). In the meantime (until this feature is available to administrators,) Trackie can help with these batch uploads. ● More refined administrator rights so that particular people can be given the right to transfer funds but not change the (club) bank account to which funds will be transferred. ● Archiving/preservation of club newsletters (key emails) for club member reference purposes) ● Separate "opt out of emails" settings for PCO, PTSO and club mass emails. Currently, there is only one setting applicable to all levels. ● Competition management (e.g. tournament management via interface (API) to Pickleball Brackets) ● Canadian Rating management.
3. What functionality is possible but not yet committed or determined?	● Recording and using a member credit (e.g. an alternative to giving a refund.) ● Automated email to be sent shortly after the expiry of a membership (complementing the existing "renewal is coming due" email).
4. Will the Canadian Rating system interface with and be comparable to the USAPA tournament player rating?	● A common world-level rating system has long been a pursuit of PCO. PCO will address this specific question in the future. For the moment, other PCO developments, including PCNS functions, are taking priority and all available volunteer resources.

Appendix B – Membership Data Fields

The table below is a partial list of the membership fields in PCNS. Clubs may also add additional membership fields.

In this table:

- Level column:
  - ○ "Can" indicates field created in the membership record at the Canada/national level
  - ○ "P" indicates a field added by Pickleball Alberta
  - ○ "Club" indicates field optionally added by Clubs
  - ○ "S" indicates a field controlled by PCNS

- Required column: "Y" indicates it is a required field in PCNS

Field	Level	Required	Explanation and Comments
Member-Entered or Member-Selected Fields			
Membership (Age) Category	P		Used at the PA level to designate Youth and Adult memberships. Clubs may also have different age categories.
Membership Type	P/ Club		PA only has one membership type. Clubs may set more than one membership type (e.g. Edmonton Pickleball Club has a temporary type for Edmonton Club Founders). Most clubs only have one membership type.
Picture	Can		
First name	Can	Y	
Last name	Can	Y	
Email Address	Can	Y	
Email Opt in (Yes/No)	Can	Y	The default for new members is Yes (members receive mass emails). Members can reset this themselves in their profile if/when they wish.
Phone	Can	Y	
Alternate Phone Number	Can		
Full Mailing Address - Street Address	Can	Y	Member's residential address
Address 2	Can		
City	Can	Y	
Province/State	Can	Y	
Postal Code	Can	Y	
Country	Can	Y	
Date of Birth	Can	Y	Used to help uniquely identify members. Format YYYY-MM-DD.

Field	Level	Required	Explanation and Comments
Gender	Can	Y	Male, Female, Gender Diverse
Emergency Contact Name	Can	Y	
Emergency Contact Phone	Can	Y	
Preferred Language	Can		English or French.
Alberta Sports Zone	P	Y	This field has been added in PCNS at the provincial level. Member picks from Zone 1 to 8 or "Non Alberta Resident".
Waiver of Liability	Can*	Y	
PA Code of Conduct	P	Y	Added by PA.
PCO or Club Admin Fields (Member can see but not enter)			
Officials Certification (several fields)	Can		Controlled and administered by PCO; includes Level 1 Official, Level 2 Official, Level 3 PCO Certified Referee and dates associated with the attainment of each level.
Club Rating (several fields)	PA / club		A PA-Club-Rating field was added (imported to PCNS) by PA, as a transition step to help some clubs carry over the club rating data they had posted to PAWA. Each club who wants such a field in future, must set up their own club rating field, as the PA-Club-Rating field will be deleted soon. PA had some club rating fields also populated as part of the conversion to PCNS. These were for Parkland, Calgary, and Red Deer (Club-Rating-PPPH, Club-Rating-Calg and Club-Rating-RD)
System / Management Fields			
PCO #	S		PCNS assigns a PCO membership number to a new member
Club / Home Club (one or more fields)	S		A member may belong to more than one club, so this represents each connection between a club and a member. From the perspective of a membership record, there are one or more club names associated with that member. One of these clubs is designated the home club. (PA Admins and members can change a member's home club if they belong to more than one; club admins are not able to change a member's home club, but can advise a member how to do so themselves.)
PCO-Expiry Date, PTSO-Expiry Date, Club Expiry Date (several fields)	S		PCNS has an expiry date for each type of membership (and each PTSO and club membership) the member has. (Note: a field simply labelled as "Expiry Date" is misleading; the PCNS developer has been asked to properly label all these fields in PCNS.) PCNS also has a start date for each membership.

Field	Level	Required	Explanation and Comments
Status	S		PCNS values are Active or Expired. • When viewing a club's membership, the status indicates whether the member's membership is current (active) for that club. This meaning applies regardless of whether the admin is a PTSO-level admin or a club-level admin. • When viewing the entire Pickleball Alberta membership, the status indicates whether that membership is current (active) at the PA level.
Season Year	S		
Registration Date	S		This is the latest PCNS registration or renewal date.
Payment Date	S		The latest membership registration payment date. It is usually the same as "Registration Date" but may be different if, for example, the members were imported and did not pay through PCNS.
Billing Email	S		The address a receipt is sent to. May be different than a member's email, as one member may pay for another if registered or renewed together.
Price	S		The PA or club membership fee paid.
Other Billing fields, Payment Type, Payment status	S		There are many such fields in PCNS. See the filter on a member list page.
Edited Date	S		
PCO Join Date	S		
PCO Days to Expiry	S		
Club Days to Expiry	S		

Appendix C – PA Configuration Settings

The following tables show the location and value of settings in PCNS that are being set up at the provincial level by Pickleball Alberta. These settings drive automated membership renewals, issue automated emails, set prices of membership, <u>at the provincial level</u>. These settings also build the Pickleball Alberta PCNS web pages.

Clubs may find Appendix D more useful to them than this appendix. Appendix D is similar information, described in more detail, targeted to club administrators.

Section 01: General Information

Setting Name	Setting (Value)
Organization Name	Pickleball Alberta
Page URL	https://pickleballcanada.org/org/PickleballAlberta
Logo	Logo uploaded
Banner Image	none
Page Colour	@0033a0
External Website	https://pickleballalberta.org
Twitter	@PickleballAB
Facebook URL	https://www.facebook.com/PickleballAlberta/
Instagram URL	https://instagram.com/pickleballalberta
Contact Info	Blair Morton – Technology Director info@pickleballalberta.org Brenda Feser – Membership Manager membership@pickleballalberta.org
Manage Questions	1. Alberta Sports Zone: Required. Option 1: Zone 1 – Sunny South ... Option 8: Zone 8 – Peace Country, Option 9: Non Alberta Resident. More Settings > Tooltip text = "To locate your Sport Zone, click HERE" 2. PA Club Rating. (This field should be eliminated after Calgary, Red Deer, Parkland and Barrhead have populated their individual club player rating fields with the same info.) Radio Buttons: Options: 2.5, 3.0, 3.5, 4.0, 4.5, 5.0. More settings > Tooltip text = "Club admins will be able to read this field and use it to populate club-specific rating." Accessible to admins only: Y.
Waiver Forms	Pickleball Alberta Code of Conduct, Textual Waiver, Required, More settings > Apply to All registrants, Digital Signature required, Parent signature required if under age of majority
Custom Messages	<u>Confirmation/Receipt:</u> (PA logo) **Message From Pickleball Alberta** **Pickleball Alberta** confirms your payment for the current membership year has been received. Thanks for supporting our favourite sport!

	Welcome Email. (PA Logo) **Message From Pickleball Alberta** **Pickleball Alberta** welcomes you! Your membership supports the growth of pickleball in Alberta and Canada. Check out our website for more information including places to play. Renewal Email. (PA Logo) **Message From Pickleball Alberta** **Your Pickleball Alberta membership** is expiring December 31, like your Pickleball Canada and Alberta club memberships. Your memberships can be renewed as described for the Pickleball Canada renewal. We'd love to see you back with friends on our Alberta courts. Registration Page. (PA Logo) **Message From Pickleball Alberta** Pickleball Alberta and its affiliated Alberta clubs are transitioning to this new system in 2021. If you see a "Registration is Disabled" message below, please go to our current provincial membership system. For details on when clubs are beginning to accept membership registrations on this site, check out our web page.
Advanced Options	Disable Public Webpage: No Hide social media sharing: No Require billing phone: No Enable entry notification: No Manage Address > Enable editing: Yes, Enable scratches: No, Manually approve: No

Section 02: Age Categories

Setting Name	Setting (Value)
	Category Specific Club
Category 1	Youth – Under 18 years old, type: by Age, 2 – 17 as of Dec 31, no other settings on
Category 2	Adult, type: by Age, 18 – 99 as of Dec 31, no other settings on
Advanced Options	All No, except Hide categories that registrant cannot register: Yes. Rename dropdown to: Pickleball Alberta Category

Section 03: Membership Types

Setting Name	Setting (Value)
	Multiple Memberships
Type 1	Name: PA Membership (renamed on May 26, 2021 from "2021 Membership"); Male categories: All categories, Female Categories: All categories
Advanced Options	Maximum individual types per registrant: 1, Location of membership types: After the question Profile Photo, Display after age category, Limit registration form to one registrant at a time: No, Allow duplicate registrations: No, Limit # of registrants: No.

Section 04: Payments & Deadlines

Setting Name	Setting (Value)
	No entry deadline: checked
Regular Deadline	$5.00 per registrant
	Charge each registrant
	Manually submit refunds
	Bank account info entered.
Advanced Options	Mountain Time Zone; Edit entry deadline: same as registration deadline (checked); add extra fees: No, Charge Tax: No

Appendix D – Club Configuration Settings

Below are some settings that clubs may wish to use to drive automated membership renewals, issue automated emails, set prices of membership, and more. Clubs should review these settings in detail, and determine what they want their values to be, at least initially, in PCNS. PA can provide additional assistance and guidance upon request. Completing the values in advance will speed up PCNS set up.

The following settings are accessed by:

1. logging in as a club administrator
2. clicking "My Members" in the top "My Account" menu or on the Overview page, taking you to the Current Memberships page,
3. clicking the name of your club, taking you to another page that looks like this:

4. clicking "Edit Settings" after the name of your club.

On the Edit Settings page, click the red "Edit Information" button to make changes to each section.

After settings are changed, **click the "Update Information" button on the bottom to save your changes**. (You will be amazed at first how often you lose work because you forgot to do this, but it will soon become a habit.)

Many of the settings you add here will result in content being added to your club webpage. Each piece or block of information added can be called a content block or article. These content blocks can be moved around on your webpage so they appear in the order you would like.

While editing any section described below, a "Preview Page" link will be displayed in the top right corner of your screen. Click this link to see the effect of your changes on your club's webpage. To get back to settings, either:

- click the Edit button displayed in the top right of any content block, or

● click the "Edit Settings" button in the Admin Options menu on the left.

First Setting

Before getting to Section 01, you will see a screen like this:

Most clubs should leave this setting as is: December 1. With this setting, your club's membership renewal message will be combined with messages from PCO and PA and will go out in one automated email to members who haven't already renewed on December 1.

If you pick another date, your automated email renewal notice will go out separately from the combined PCO and PA notice.

You can access your renewal message using the Customize renewal message link here, or you can do so as described in the Custom Messages of Section 01: General Information.

Section 01: General Information

Setting Name	Advice or Setting
Club Name	Enter your official club name. Must be a unique club name matching the name used when becoming affiliated with Pickleball Alberta. Your club name will be displayed at the top of your web page.
Your Page URL	DO NOT CHANGE the initial text in this box (which reads https://pickleballcanada.org/club/) but do add some unique club name or club acronym after these characters. Do not use spaces or slashes in these added characters. This URL (web address) is for your club's webpage on PCNS. You may use this address in other web pages, emails, posters or other communications to advertise your club information and web presence. This URL is also a bit shorter than the alternative of something like: https://secure.pickleballcanada.org/club/clubname/31882/ The above is also explained at this video: https://vimeo.com/519586955/ddf861562b Set a value here, even if you don't plan to use the PCNS web page. This reserves the URL for your club in case you want to use this PCNS webpage in future. If your club has its own domain and you'd like that domain name used in future for your club webpages on PCNS, please email your request to PA. It will be passed on to Trackie who will process each of these requests individually.

Setting Name	Advice or Setting
City	Enter your principal city or town. If you would also like your venue location(s) listed in a "Venue Locations" block on your webpage, click the adjacent "Add Venue Location" button and fill in the pop up box.
Province / State	Alberta
Country	Canada
Logo	You can have your club logo displayed on your web page. Your logo needs to be available as a jpg, gif, or png file. Click "Upload File'' then navigate to the folder on your computer containing the logo image. You are not required to have a club logo to add to this page.
Banner Image	Optional long narrow image that can appear on the top of your webpage. Click "Upload File" to begin. ● If you already have a distinct club banner you want to use, select the "Upload" radio button, then press the "Upload File" button, navigate to your banner image file on your computer and upload it. Select the "I confirm…" check box after uploading the file. ● To select a stock banner provided by PCNS, select the "Choose an Image" radio button, then choose an available image. ● Click "Submit" to save your change.
Page Colour	Click the default colour to bring up a colour wheel. click a spot on the wheel to set the accent colour of your web page.
Website	Insert the URL (web address) of your other club website, if you have one. This will result in a "Website" button appearing on your PCNS webpage, near the top of the page, next to the "Register" button. When a member or visitor to your PCNS web page clicks this "Website" button, it will take the member or visitor to your other website.
Twitter	Insert the handle or hashtag of your club twitter account, if you have one.
Facebook	Insert the URL (web address) of your club Facebook page, if you have one. E.g. https://www.facebook.com/groups/862471180475350. An image and text from your Facebook group will be displayed on your webpage, in a News/Social Feed box, along with a button that allows someone to jump to your Facebook group.
Contact Information	Enter the name and email address of your prime club contact, such as your membership director. Phone and fax are optional. Use "Add Another Contact" to add as many other club contacts as you wish. All contacts will show up in a "Contact Us" section of your web page. Contacts entered here will also be displayed to a user who encounters a "Registration is Disabled" warning message on PCNS and then presses a link to club contacts.
Additional Information	Optional. If you have one or more key documents you would like to be accessible via your website, upload it or link to it using this setting. Enter the document name and then press the "Link to File/URL" button to start uploading or linking. Information entered here will show up on your club webpage in an 'Additional Documents' content block.

Setting Name	Advice or Setting
Other Information	Optional. Enter text into this box to have it displayed as an "Other Information" content block on your webpage. For example, here is where you might add a welcome message or a message that play is suspended due to Covid, or that new memberships for the 2022 year will be available for purchase October 1 2021. (An even better option for this type of webpage content is to use other web tools, described in the Web Management section of this guide.)

Manage Questions	If you wish to add questions to the PCNS member registration form, click this button, then click the "Add Question" button in the top right corner of the pop-up box.
	● Enter the question, e.g. "EPC Club Rating" or "CPC Volunteer Interests"
	● Click the down arrow in the box below that says "Textual" and enter the data format. Options include Textual, Numeric, Date Picker, Radio buttons, Checkbox, & File Upload. Depending on the format option selected you will have other options, such as the ability to enter the checkbox values.
	● If desired, select or set a default value and check "Make required" to force the member to make a selection or enter a value.
	● If desired, click "More settings" to do any of the following
	    ○ make the field accessible (editable) by admins only
	    ○ input a tooltip that will show up as a message to a member and help them answer the question
	● If you want to ask a checkbox-type question, such as "Volunteer Interests":
	    ○ Set up a "Label" format question, called "Volunteer Interests"
	    ○ Add checkbox questions under this, one for each of your checkbox options, such as:
	        ▪ Play Captain/Court Monitor
	        ▪ Serve on Board of Directors
	        ▪ Tournament Committee
	Hit Save when done. Questions added will become fields in the PCNS membership record.
	
	See also the *Managing Groups* section of this guide to learn how to use this "Manage Questions" function to establish groups of members you can administer and use for email distributions.

Waiver Forms	You may upload club terms and conditions, privacy policies/codes, or other club documents that members will have to acknowledge as part of their membership application and renewal. Gather an electronic copy of each of these documents to prepare for uploading them into PCNS. ● Click the Waiver Forms button ● On the popup panel, click the "Add Waiver Item" ● If the code or waiver is a short piece of text, pick the "Textual Waiver" option and enter the waiver text. ● If the code or waiver is a separate document, pick the "Uploaded Waiver" option, then the "Upload File" button, then navigate to the file, etc. ● If applicable, click the Digital Signature Required checkbox. This helps encourage or verify that members have read or acknowledge the form. ● Click Save, then Close Window.

Setting Name	Advice or Setting
	Note that members are required to accept the Pickleball Canada Waiver of Liability form which is already loaded by PCNS. Most clubs find this waiver is suited to and sufficient for their club purposes. PCO and PA strongly recommend that clubs not add waivers that cover the same liabilities already covered by the PCO waiver. This PCO waiver is fully compliant and consistent with PCO's insurance and has been reviewed by a lawyer. Other waivers of liability may inadvertently contradict or dilute the provision of the PCO waiver. The PCO waiver is the same waiver adopted by PA in collaboration with the integrated clubs using PAWA. The PA Code of Conduct is also preloaded into PCNS and will have to be accepted by club members. PA has standardized this code with clubs who previously used the PA membership system. PA is recommending this code become a standard for all clubs in Alberta.
Additional Purchases	This feature may be used to set up goods for sale. At present, PCNS only allows the sale of goods at the same time as a membership is purchased or renewed. In a future release, PCNS will have a more robust store features which allows the sale of goods to members at any time. PA recommends delaying your use of this feature until it is enhanced.
Custom Messages	Pick this option and enter your own club's messages for each of the following. ● Confirmation/Receipt – a message that shows above the confirmation details or receipt details each registrant receives after registering. ● Welcome Email – a message sent to new members. ● Renewal Email – a reminder message sent to members before their membership expires. ● Registration Page – text that will show up at the top of the registration page. In the case of the Confirmation/Receipt, Welcome Email and Renewal Email, members will receive similar messages from Pickleball Canada and Pickleball Alberta. These messages will be contained within the same email in most cases. See the Custom Messages section of this guide for samples.
Manage Sponsors	This feature allows you to add sponsor names, logos, messages and links to sponsor sites to your PCNS webpage.
Manage News	To add news items to your web page, click this button then click Add News. For each news item, add a title, date, and news content. The news content can include text, links, videos, files, and images. Click Update when done each news item. Articles with the most recent date will appear at the top of the News content block on your web page.
Advanced Options	● Disable public webpage – set to Yes to temporarily hide your page, for example, while you are working on it. It may also be set to Yes if you do not want to have a PCNS public webpage. (See also the Club Finder FAQ here.)

Setting Name	Advice or Setting
	- Hide social media sharing – If set to no, and if you enter a Facebook, Twitter or Instagram address in a field described above, the corresponding social media feed will be shown on your PCNS webpage. - Enable entry notification – set to yes if you want to receive a notification each time someone successfully registers. - Enable scratches – default and recommended setting is no. If set to yes, members may cancel their membership (and some may then expect a refund). PA has not tested this function. - Manually approve entries – default and recommended setting is no. If set to yes, someone will have to approve each membership registration. PA has not tested this function. - Hide on Pickleball Canada – this controls whether a club name appears on the list of club choices when a member is registering via the PCO "Join" button. This should be set to No if you are an affiliated club, even if your club is not yet accepting registrations via PCNS you're your club is not yet affiliated with PA, a PA administrator has set this to Y, pending receipt of your affiliation agreement and pending your club's establishment of a PCNS project lead or administrator. (See also the <u>Club Finder FAQ here</u>.) - Disable registration – set this to Yes if your club is <u>not</u> ready to accept registrations via PCNS. A club is generally ready when they have decided to use PCNS, filled in all key club settings, built at least an initial PCNS webpage, and coordinated their club's implementation of PCNS with PA. When your club is ready to accept registrations via PCNS, set this to No. - Other settings – please leave as is.

Section 02: Age Categories

Setting Name	Advice or Setting
Open Club or Category Specific Club	As stated on the PCNS settings page: - select "Open Club" if your club has no distinct age categories, - select "Category Specific Club" if your club has (or wishes to now set up) two or more age categories. Consider whether you really need separate age categories: - Do you have tournaments or types of play that are limited by age? - Do you have another need to charge a different membership fee based on age alone? - Are there different registration requirements (questions) that depend upon a member's age? - Do you wish to use the age category functionality to limit membership to those of a certain age? If not, pick Open Club. It is easier and simpler to manage. You can also use the "Category Specific Club" setting to categorize members by criteria other than age. To do this, pick "By Grade" rather than "By Age" in your custom categories defined below.

Setting Name	Advice or Setting
	We recommend clubs **not** use the "by Age" or "by Grade" categorization for membership distinctions that are better defined and managed as described in the following Section 03: Membership Information.
Custom Categories	This set of options only shows up if you pick "Category Specific Club". Fill in the description, type, min, max and "Age calculated on" boxes. For example: Description Type Min Max Age calculated on Regular Adult By Age 18 100 Registration Date Youth By Age 12 17 Registration Date Click the "+ Add Custom Category" button to add a third or subsequent category row. Click the settings icon (gear icon) at the end of a category row to temporarily disable a category. Click the red X icon at the end of a category row to delete it. The "Age calculated on" options most applicable to pickleball are "registration date" and "December 31 of current year." The latter option may be preferred to align with requirements for sanctioned tournaments in Canada.
Advanced Options	Click the red plus icon beside Advanced Options and change any "No" selections to "Yes" if they apply. Most advanced options will not apply to regular annual membership registrations but may apply later when similar registration functionality is used for tournaments or other event registrations.

Section 03: Membership Types

Setting Name	Advice or Setting
Single Membership or Multiple Memberships	As stated on the section 03 PCNS settings page, there are two main options, "Single Membership" and "Multiple Memberships." Most clubs will only have one initial membership type, as the previous Section 02 will have already handled the different membership categories such as age brackets. Even if your club has only one membership type, you should select "Multiple Memberships" so you and future administrators can see and be reminded of the following pre-set membership type.

Setting Name	Advice or Setting
	Clicking multiple memberships shows the "General" membership type set for all clubs by PCO. Click the gear (settings) icon in this General row to see the following.

Note the message in the yellow box, as well as the Early Renewal date, the From Date, the To Date, the Season and the checked "Automatically create new season after last season ends." These settings are dimmed, meaning they are pre-set at the PCO level.

The Early Renewal means a member can renew next year's membership up to three months before the start of that year. More significantly though, it also means that a <u>new</u> member who joins in the October to December period has a membership until December 31 of the <u>following</u> calendar year (not just to the end of the current calendar year.) Membership managers in most clubs favor this approach for at least two reasons:

1. It avoids new member complaints and request for refunds from members who might otherwise inadvertently join just before year end, only to find their membership expiring soon.
2. It is a simpler approach that the alternative of dealing with pro-rated membership fees -- fees that decline based on months remaining in the membership year.

A fixed year of January 1 to December 31 also helps with common (national, provincial and club) membership management and is also a condition of the insurance PCO has obtained for PCO members.

In future, your club may add other optional membership types that can be purchased on top in addition to the pre-set general membership. Examples of additional memberships include:
- Regular play, fun play, and/or competitive play options packages.
- Regular membership and an optional lessons package.
- Seasonal membership packages.

Setting Name	Advice or Setting
	• Membership options/packages that have capacity limits. • Platinum, gold, silver, bronze memberships that offer higher levels of service or have built in donation levels perhaps. • Grandfathered/Founders (reduced rate) memberships. These multiple membership options/packages can be combined with the age categories defined in Section 2 to limit certain packages by member category. For example, some lessons package or series play could be limited to youth or adult categories.
Membership Types	These settings only show up if "Multiple Memberships" is selected for the setting above. This setting group is used to: • set a name of each additional membership type, and • allow or restrict access to a particular membership type to certain age (or grade) categories defined in Section 02. Examples: Name Male Categories Female Categories General All Categories All categories Women's 3.0-3.5 Ladder (blank) Regular Adult Spring Youth Training Youth Youth 3.5-4.0 Shootout League Regular Adult Regular Adult Intro Package for Non-members All Categories All Categories 3.0 Mentoring Package All Categories All Categories Click the "+ Add Membership Type" button to add a second or subsequent membership row. Click the settings icon (gear icon) at the end of a category row to: • temporarily disable a category • allow non-members to register for that particular membership type • enter a code which members will have to know (be secretly told) to indicate their qualification for that membership (e.g. for grandfathered or founder members) • enable and define seasonal types of memberships • set capacity limits • enable waitlist for types with capacity limits Click the red X icon at the end of a category row to delete it.
Advanced Options	Click the red plus icon beside Advanced Options and change any selections if needed. Advanced options allow: • control over the number of membership types per registrant (Set this to Unlimited unless you have a reason for picking a specific number.) • hiding of membership types not available to registrants (e.g. because of age or gender) on their registration form • control over the placement of Membership Type options in the applicant's registration form (We suggest picking Top of registration form)

Setting Name	Advice or Setting
	- control over duplicate registrations (We suggest No to prevent duplicates) - setting club capacity limits on membership categories - setting up waitlists for categories with capacity limits (We suggest No.)

Section 04: Payments & Deadlines

Setting Name	Advice or Setting
(initial check boxes)	The initial settings in this section are check boxes (yes or no) for each of the following: - No entry deadline (registration always open) - No charges for registration (free membership) - Open registration on a specific date Most clubs should accept the default of having only the first of these three settings checked.
Early Bird Deadline	This setting is currently dimmed and unavailable.
Regular Deadline	Option 1: If you only have one membership category (one age bracket), or if you charge the same membership price for two or more categories (say Adult and Youth), then for your annual membership regular deadline: - enter the club membership fee (This can be set to $0.00 if you have no fee or if you are collecting club fees outside PCNS. It can also be set to $0.01 if you only want a nominal fee collected by PCNS. This allows club administrators to view member payment receipts.) - choose "Per registrant" Option 2: If you have a base price for all member categories, and an add-on price for one or more member categories or types (say for the type "Competition League") AND if the deadline for enrolling in this member category or type is the same as your regular membership deadline, then: - set your base price per Option 1 - click "+Add Custom Price", and in the Custom Price pop-up window: - select "Type/Age Specific - enter the Price for the add-on category or type - in the next two text boxes enter the Membership Type or Category of this add-on - pick "Members Only" if this add-on is only available to members. - click Submit Option 3: If you have no base price applicable to all member categories, but you have different prices for each member category (e.g. different prices for Adult and Youth), then: - set your date per Option 1, and set a base price of $0.00 - for each member category: - click "+Add Custom Price" button, and in the Custom Price pop-up window: - select "Type/Age Specific"

Setting Name	Advice or Setting
	▪ enter the Price for that category or type ▪ in the next two text boxes select the Membership Type or Category ▪ pick "All Registrants" if this membership is available to the public (new members) and to renewals for existing members. ▪ click submit. Do not choose "+ Add Custom Price" in this section unless you have other membership types <u>with the same deadline.</u> For membership types, such as add-on packages, that have different deadlines, see the next row below.

+ Add Another Deadline	If you have packages (e.g. a package of play times for a "3.5-4.0 Shootout League" membership type), other membership types, or membership categories, any of which have <u>different deadlines</u> than your regular deadline above, this group of settings applies to you.
	
	● Click "+ Add Another Deadline"
	● Click the pencil icon next to the "Additional Deadline 1" title, and change the title as needed (e.g. to "Competition Deadline 1")
	● Enter the closing date and time for registrations, the price and choose "per registrant." (The price here can be zero as there is also a price setting below)
	● Click "+Add Custom Price", and in the Custom Price pop-up window:
	   ○ select "Type/Age Specific"
	   ○ enter the Price,
	   ○ choose "One-time cost"
	   ○ select the Type(s) (e.g. "3.5-4.0 Shootout League")
	   ○ in the "Applies to:" box select the applicable categories (e.g. "Regular Adult")
	   ○ set last choice to "Members only"
	   ○ click Submit
	● repeat the "+Add Custom Price" steps for each additional package, other membership type, or other category with the same deadline.
	● To edit or delete one of the above custom prices, click the pencil or red X icon to the left of each custom price row.

	<mark>IMPORTANT:</mark>
	If you have more than one membership type or category:
	  a. Ensure that each combination of membership category and type is covered by a Custom Price row in the Regular Deadline subsection or in an Added Deadline subsection.
	  b. While creating each Custom Price row, select one or more Membership Types. If you leave this field blank, this price will be applied to All Membership Types, and that is probably not what you want.

Manage Discounts for Specific Registrants	The following may not work as described or at all. PA has not tested it, and Trackie advises it not be used at this time. PA is seeking a full answer from PCO regarding the handling of "grandfathered" memberships. These are memberships that have been prepared for several years into the future.

Setting Name	Advice or Setting

	When this is setting becomes usable, we believe it could be used if one of the following applies to your club:
	
	    o your club has founding members or others who have been granted discounted membership prices, or
	    o your club has grandfathered members who have prepaid memberships for several years, and so get a "free" membership this year.
	
	To use this setting:
	● Click "+ Manage discounts for specific registrants"
	● In the Setup Discounts pop-up window, select "Enable discounts for specific registrants"
	● Click the "Download our template file (IMPORTANT)" link
	● Save the "MembershipUploadTemplateRegistrantDiscount.csv" file to your computer.
	● Open that file in Microsoft Excel and enter the information on members qualifying for the discount. The information needed is Last Name, First Name and DOB (date of birth in yyyy-mm-dd format). These must exactly match the last name, first name and DOB of members in PCNS. Save the file.
	● In the Setup Discounts popup window, click the Upload File button, and navigate to your saved file and upload it.
	● Select "Single Discount" discount type.
	● Enter the discounted price (which may be $0.00)
	● Click Save, then Close Window.

Payment Method	PCNS only allows one method: Payment online.

Processing Fee	There are two choices: Charge each registrant or Absorb processing fee.
	
	As described in the Costs section of this Guide, the processing fee is 50 cents plus 4.9% of the base charge, then GST (5% for Alberta) is added onto the processing fee. For an annual membership payment, the base charge is the PCO fee plus the PA fee plus the club fee.
	
	To understand the explanation below, it helps to think of the processing fee in three parts: one part is based on the PCO membership fee, a second part is based on the PA membership fee and a third part is based on the club membership fee.
	
	Each organization (PCO, PA and the club) have a choice whether to charge each registration or absorb their part of the processing fee.
	
	    ● If the organization chooses to charge each registrant, then:
	        o their portion of the processing fee will be visibly displayed as an extra charge on the screen that members see just before proceeding to the payment page, and
	        o the organization's full membership fee will be credited by PCNS.
	    ● If an organization chooses to absorb the processing fee, then:
	        o the processing fee the member sees on the screen will exclude the portion that pertains to that organization, and

Setting Name	Advice or Setting
	o that organization will receive proceeds equal to their membership fee less the processing fee applied to their portion of the combined membership fees. PCO and PA are choosing "Charge each registrant" so a processing fee will definitely appear on each member`s charge screen. The choice that clubs make, to either charge or absorb, will affect the amount of that total processing fee that is visible to a member. Two examples of membership fee charges follow. A. Club chooses to charge each registrant. Organization　　　　　Base Fee($)　　Processing Fee($) Club　　　　　　　　　　50.00　　　　　　　3.87 Pickleball Alberta　　　5.00 Pickleball Canada　　 10.00 Total Charge　　　　　　　　　　　　　　　68.87 B. Club chooses to absorb the processing fee. Organization　　　　　Base Fee($)　　Processing Fee($) Club　　　　　　　　　　50.00　　　　　　　0.77 Pickleball Alberta　　　5.00 Pickleball Canada　　 10.00 Total Charge　　　　　　　　　　　　　　　65.77 In example B, the portion that the club is absorbing is $3.10. This amount will be deducted from the club fee, so a net payment of $50.00 - $3.10 = $46.90 will be available to the club. Note that the processing fee shown above is the combined processing fee for all organizations who choose to charge each registrant. This fee appears on the club charge line whether or not the club chooses to absorb their portion of the fee. (PA is seeking to have PCNS modified so this charge is NOT on the same line as the club charge fee.) Collected club fees are transferred to the club's bank account when a transfer is initiated by a club administrator.
Refunds	For membership fees, select either "Manually submit refunds" or "No refunds". You may wish to select the "Manually submit refunds" even if you currently have a "no refund" policy on membership fees, in case your club runs into some unique circumstance in future which requires a refund. (Refund processing to be further explained by Trackie and described in this manual.)
Bank Account	● Select "Canadian Bank Account." ● Enter the club name used on your club bank account. ● Enter the transit #, Institution # and account #.

Setting Name	Advice or Setting
	PCO Business Rules require that clubs have a club organization bank account to collect club fees through PCNS. PCO cannot accept the liability of having funds transferred to personal bank accounts.
Advanced Options	- Click the red plus icon to open the advanced options. - Set the time zone to Mountain Time Zone. - Set the "Allow extra registration time after deadline" to No (recommended) or to a few minutes later if desired. - Check the Edit Entry Deadline box so it is the same as the registration deadline. - Select "No" for Add extra fees (or select Yes and fill in the extra fees details) - Charge tax: - If your club is registered to collect and remit GST to the Canada Revenue Agency, select "Yes", enter "GST" as Tax 1, 5%, apply to all registrants. - Otherwise select "No"

IMPORTANT:

After setting up your membership categories and types and establishing prices and deadlines for each, it is very important that you test your settings, or ask someone else to test your settings. One of the best tests is to actually try to buy each type and category of membership you have for sale. You can, for example pretend you are a new member by logging out, then press the Join/Renew button, and fill in the information needed to purchase a membership, up to the point where you see the list of charges, then cancel the registration before entering a credit card payment. This testing will also help you learn the system and see the effects of some of your settings.

Repeat your testing every time you change your settings, and particularly when you add a new membership type or category in future.

Appendix E - Acronyms, Names and Key Terms

Term	Meaning
Affiliated clubs	Clubs who have signed an affiliation agreement with their provincial association, who administer membership in collaboration with their provincial association, and whose members all belong to PA and PCO. (PA has signed an affiliation agreement with PCO.)
CMS	Content Management System – the part of PCNS used to manage web pages
Integrated clubs	Alberta clubs using PAWA for membership management.
ML	MemberLeap -the membership management system being phased out by PCO
MMS	Membership Management System – a part of PCNS used to manage memberships
PA	Pickleball Alberta
PAWA	Pickleball Alberta's Wild Apricot system for membership management – now phased out
PCNS	Pickleball Canada National System – new system replacing ML and PAWA
PCO	Pickleball Canada (O = organization)
PTSO	provincial/territorial sports organization. In Alberta, the PTSO is PA.

Appendix F - Administrators Conduct and Protection of Privacy

If you are a partial administrator (not a full administrator), your ability to change certain membership data in PCNS may be limited. This means it is unlikely you will be able to change information you shouldn't be changing. Nevertheless, some roles may not align exactly with categories of PCNS administrators, so you may have access to some system settings or information beyond your level of training. As well, you may have the ability to read membership and other sensitive information.

It is important for your club and for all our members that the integrity of our shared membership data be protected, and that confidentiality and privacy of members be respected. To do so, we ask all administrators to adopt the following code of conduct.

Your use of your administrative rights signifies your acceptance of this code. If you have any concerns with this code, or any suggestions to further improve it, don't hesitate to contact the lead administrator for your club or Pickleball Alberta.

 PCNS Administrators commit to:
1. reading and adhering to national and Pickleball Alberta policies related to privacy and codes of conduct
2. never sharing or using PCNS membership, event or other information for purposes other than managing pickleball memberships and events
3. taking PCNS training, tailored to your role, that is available from full administrators and from your administrative predecessors
4. as a membership administrator, only modifying a member's information when members are unable to do so themselves
5. recognizing that only the membership administrator should modify a member's club rating (members are not allowed to change their own club rating)
6. never adding, activating, or inactivating a member directly, as PCNS processes handle these automatically
7. never modifying system fields or adding or deleting fields (registration questions) unless you are the membership administrator or a full administrator and have a full understanding of the implications of these actions
8. consulting with a full administrator if there is a need to make unique, unusual or unpredictable changes to any membership or system content or settings
9. not sharing their PCNS access (password) with anyone, not even someone temporarily taking over your job or serving as a backup resource; all cover-off and backup resources must have their own access, known to the PCNS full administrators
10. changing their password annually
11. informing PCNS lead administrators when they leave their role in their club or no longer require PCNS Admin rights
12. only creating a maximum of five email templates
    a. Note that this does not limit emails, only the number of templates. Only one template is needed for a club newsletter, for example, and that template should be edited when needed, not abandoned and replaced with another template. Advise a PCNS full administrator which of your templates are no longer used and can be deleted, if lacking the admin privileges to delete these directly.

Appendix G – Guide Updates

This table summarizes updates to this guide.

Date	Content Changes
Jan 25, 2022	• Removed obsolete implementation plan; added PCNS picture to first page.
Jan 8, 2022	• Updated Custom Message for the Registration Page
Nov 9, 2021	• minor updates
Jun 27-29	• Added Merging Duplicate Membership Records • Added Exporting and Printing Member Lists • Explained automated fund withdrawals in Funds Transfers • Removed data conversion information and PAWA and MemberLeap references from Appendix B. PCNS field definitions updated. • Deleted Appendix E – PCNS Settings for Clubs in Transition and re-numbered subsequent appendices
May 17-26	• Updated Introduction to PCNS • Updated Club Use of PCNS • Modified Editing Home Club • Completed Email Management • Completed Appendix C – PA Configuration Settings • Minor edits to other sections
May 5-9	• Added several sections to Membership Management for Administrators • Added Membership Management for Members • Added Ongoing Administration • Added expected PCNS Business Rule • Deleted the obsolete "Key Decisions Needed" section from end of Appendix B, as decisions on field changes and grandfathering have already been made.
May 4	• Added FAQ 3 to PCNS Website Management; modified FAQ 1 and 6 in PCNS Membership Management
Apr 26	• Updated Custom Messages
Apr 18	• Updated some sections in Financial Management
Apr 14	• Tweaked June Cutover Plan
Apr 4-5	• Added content to Website Management. Accepted all of Bev & Blair's edits.
Mar 30	• Added step to June Cutover Plan

Date	Content Changes
Mar 24-27, 2021	• Updated *Appendix A - FAQ > PCNS Email Functionality*. • Added Implementation Considerations > [Communication to Members](#)
Mar 22-23, 2021	• Added content to *Web Management > Using the Web Page Tools (Admin Options)*. • Incorporated Blair's fixes; updated *Table of Contents*
Mar 13, 2021	• Added *Places to Play Management*. • Added to section *Accessing PCNS*. • Added step to *June Cutover Plan*. • Added *Club Finder* section to *Appendix A*.
Mar 7-10, 2021	• *Website Management* section, Sample Club and Province PCNS Websites – url addresses all changed to new domain (pickleballcanada.org); Lethbridge and Alberta added to table • *Implementation Considerations* – substantially updated. • *Appendix B – Membership Data Fields* – some updates made, but not indicated. Several questions for Trackie removed (now in separate document). • *Appendix D – Club Configuration Settings* – several updates, all indicated with Mar 7-9 dates. • *Appendix E – PCNS Settings for Clubs in Transition* PCNS has been activated as of March 8, 2021. Along with this change, all of the development and demonstration web-page addresses (URLs) that previously had a prefix of https://secure.pickleballcanada-ipp.com/ have now been changed to https://secure.pickleballcanada.org/
Feb 27-28, 2021	• Appendix B extensively updated. • Updated Membership Management chapter and added "Managing Groups" section. • Added Appendix E – PCNS Settings for Clubs in Transition
Feb 25-26	• Minor updates to various sections.
Feb 22, 2021	• Filled in the rest of the table in Appendix B and added more explanation and comments to the table.
Feb 20, 2021	• Appendix B - Membership Data Fields - 65% done • Processing Fee, Section 04, Appendix D – rewritten (Processing fee section only)

==Do you have updates, comments or suggestions to improve this guide? Email Ray at== membership@pickleballalberta.org