

Groundwork Process- July 2021

Starting a New Season and Player Movement

As of May 2021, Groundwork (GW) now has the ability to create new seasons. This is helpful when you want to have a new Payment Schedule that only pertains to your new roster- vs adding to the old Payment schedule and then having to delete invoices for the new players. Real must set up the New Season but you can change the 'nickname' and also the date range- which are irrelevant to anything except clear identification.

The most important thing is to select the new Season when you are ready to Add new players and create a new Payment Schedule for your new roster. You will see a box with a pull-down arrow at the top of your main GW screen next to your team's name. You can choose the old season Nov 1 2020-May 31, 2021 or Fall 2021. Real plans to set up new seasons each Spring.

Things to Know with the New Season-This will start you off with a clean slate. When you add new players, your old payment schedule will not exist for them. You won't have to manually delete those invoices from the past!

- You must create a Published Payment Schedule before you can Invite parents to the new season.
- You will need to use the Add Invoice at the Player Level for the Min Balance deposit for any new player coming on from either another Real team or out of Club.
 - If you don't have any other expenses to create a Payment Schedule, you will not be able to do the Add Invoice. You could create a Payment Schedule for the \$50/\$100 min balance but then will need to delete it from anyone from your former roster. Or, just wait to do the Add Invoice for the Min bal after you have a new expense for the team and are able to do that in the Payment schedule.
- You will need to remember that you are holding the \$50/\$100 from all of your other players in the old season- it will not be visible in the New season- we have asked for this enhancement for future releases.
- You can still collect from last season and at the same time Invoice/ collect for the new season.
- For teams that have not wrapped up their season yet, just continue to work in the Old/current season until you are ready to use the new season.
- You DO need to Invite Parents again for them to accept the new season. This involves you clicking the Send Invite Button. The parent just needs to accept the invite by logging in and clicking one button and choosing the payment option. Their payment information is retained from the previous season.

FAQ's on Season Wrap Up

Q: How do I add a Player coming from another Real team?

A: Go to Collections, click the blue Add Player at the Bottom. Use the + Select from Existing Players. This allows the parent to retain their login/pswd and payment information from their previous team.

Q: How do I know how much \$ a player has in their account for refunding?

A: The way to look at things in GW is what is Paid or Unpaid vs how much money is in the account. Everyone should have the \$50/\$100 min balance which is refundable and then if you had Carry Over Funds from KeyBank or new fundraising then that is extra that would be added to the \$50/\$100 amount for a refund. If there are monies owed (Past Due RED amounts) then you would deduct that from the Min Bal before refunding. You do not need to unreconcile/reconcile anything at the player level. Just refund the appropriate amount- enter good notes in the BillPay and remove the player roster from your roster. They can stay on the old roster if you want that history, and it will also allow another team to Select them as a player if they still exist out there. Do know that the Memo line is what the parent receives on the check. The Note section is for you internally.

Q: How do I refund players going to another Real team?

A: Do a Team-to-Team transfer to move the funds. Go to Team Banking and click the Green Transfer button at the bottom. Select the new team and enter the amount to be transferred. Use the notes to put in the Player Name and identify if any funds are from Fundraising.

Best Practice- Create a separate Transfer for each Player vs bundling multiple players/\$ together. This allows the new treasurer to easily reconcile each deposit with a player and keeps things clean in the event that funds need to be unreconciled etc.

Q: How do I refund players leaving the Club?

A: Calculate the amount owed based on the Min Bal and any applicable Carry Over Funds. Deduct any past due amounts and refund (or partial refund if you deduct unpaid invoices) from the Min Balance invoice. Go to Collections, click on the Player's name and find the Min Bal Invoice- you may need to go back to a previous Season to find it. If the Min Bal wasn't paid by the parent card/bank or if there are other funds beyond the Min Bal then you can do a BillPay for the amount to be refunded. Go to Team Banking and click on the Green BillPay at the bottom.

Remove the player from your roster. In the future, when you are adding new Players and collecting funds directly via the parent ACH, you will be able to simply do a Refund Invoice for that Min Balance directly back to the parent's ACH (or card-however they originally paid). This would eliminate the need to do a BillPay if/when a player leaves the club and you have just that Min Balance to refund.

Q: I'm a Treasurer and the Slush/Team player is connected to my email. My player moved to another team and the system won't let me 'de-couple' my email to allow the Slush/Team player to stay with the team.

A: We instructed folks to set up the Slush/Team players and simply use their (the treasurer) email address since it wasn't going to any parents and didn't matter. However, this becomes an issue if you sent an Invite and accepted that invite and are now leaving the team. In the future, or now if you haven't sent an Invite or that Slush/Team account, we recommend that you use your realcolorado.net email address that is used for King Sooper statements. This will then allow that 'Slush Player' to always be connected to the team and not a treasurer.

Below is a link to the GW help center for creating a New Season. Note the first 2 steps, we have done on our end- creating that New Season. However, the screen shots of what the multiple seasons looks like is helpful and the other notes with it.

<https://help.ground.work/support/solutions/articles/60000660851-guide-to-closing-out-your-season>

Guide to closing out your season : Groundwork Help

In Groundwork, there are two ways that you can close out the season for your teams. You can either add a new season - which means you will be using the same team account, and rolling it over into the next season, or you can archive the team and create new ones - so you'll be starting fresh! It's up to you as the club to decide what is best for your organization and teams.

help.ground.work