



spordle

HCR 3.0 - Newsletter

November 1, 2021



"Lead, Develop and Promote Positive Hockey Experiences."

HCR 3.0 Update

Key Topics

Improvements



Key Topics in this Newsletter

- MEMBERS – Void a Transaction
- MEMBER – Refund a Credit
- CLINICS – Attendee Information
- REPORTS – New Reports Available
- TEAMS – Criminal Records Check
- SETTINGS – Team Restrictions & Rostering

Key Links and Contacts

- [HCR 3.0 User Guide](#)
- [HCR 3.0 Support](#)
- [New Frequently Asked Questions](#)
- [Roles and Permissions](#)

MEMBERS – Void a Transaction

There is now an option to void an invoice. Any invoice that was not paid and you want to remove from the book, you can now use the Void invoice feature.

Note: Currently, you can void a transaction that has no payment applied. Next week a tool that will allow you to void the balance of an invoice will be released.

The screenshot shows a 'Member' page with a table of transactions and a sidebar for invoice details. The table lists various transactions including initial credits, credit card payments, and registrations. The invoice sidebar shows details for invoice #2021200103254, including a total of \$500.00 and a 'Void invoice' option highlighted with a red arrow.

Date	Type	Description	Amount	Balance	Other
2021-10-05	Initial Credit	Credit	-	-	-\$11.00
2021-09-13	Credit card	Official - *Official - Level 3 - Clinic (OFF-3C)	-	-	-
2021-09-13	Credit card	Official - *Official - Level 3 - Clinic (OFF-3C)	-	-	-
2021-08-24	Initial Credit	Credit	-	-	-\$20.00
2021-08-17	Credit card	1 Registration(s)	\$100.00	\$100.00	-
2021-08-13	Cash	1 Registration(s)	-	-	-
2021-08-06	Cheque	1 Registration(s)	-	-	-
2021-08-06	Cheque	1 Registration(s)	\$500.00	-	\$500.00
2021-07-28	Initial Credit	Credit	-	-	-\$5.00
2021-05-01	Raymi Gelineau Cheque	1 Registration(s) 1 Item(s)	\$600.04	\$200.00	\$400.04

Invoice #2021200103254
Manual Transaction
Initial payment date

\$500.00
Total

Registration(s)
The manual transactions have to be fully paid to be refunded

JOHN AC
JA
Go to profile

Payments: PZ t

2021-08-06
Pending

Actions

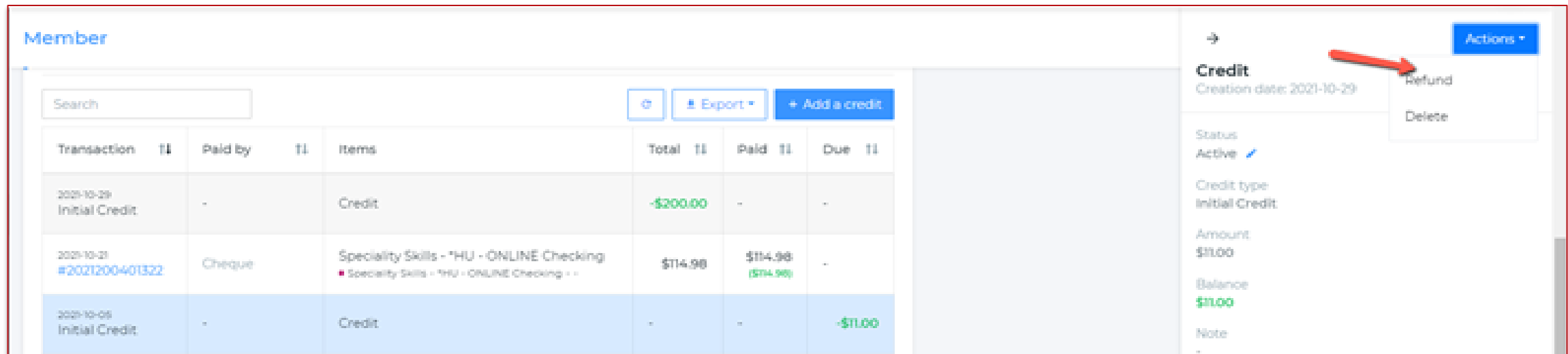
- View Invoice
- Apply Payment
- Cancel items
- Exchange items
- Refund
- Convert to transactional
- Void invoice**
- Resend Invoice
- Resend Invoice With Receipt



MEMBER – Refund a Credit

The option to refund a credit is now available. To refund a credit, open the side panel and click the blue Action button, and select Refund.

Note: All credits that have a balance, even if the credit was partially used can be refunded.



The screenshot displays a software interface for managing member credits. On the left, a table lists transactions. The selected row is highlighted in blue. On the right, a side panel shows the details of the selected credit, including its creation date, status, type, amount, and current balance. An 'Actions' dropdown menu is open, with a red arrow pointing to the 'Refund' option.

Transaction	Paid by	Items	Total	Paid	Due
2021-10-29 Initial Credit	-	Credit	-\$200.00	-	-
2021-10-28 #2021200401322	Cheque	Speciality Skills - *HU - ONLINE Checking Speciality Skills - *HU - ONLINE Checking	\$114.98	\$114.98 (204.98)	-
2021-10-08 Initial Credit	-	Credit	-	-	-\$1.00

Credit
Creation date: 2021-10-29

Status: Active ✓

Credit type: Initial Credit

Amount: \$11.00

Balance: \$11.00

Note: -

Actions: Refund, Delete

CLINICS – Attendee Information

When you manage the attendees in a clinic you can now use the side panel to see information from the member and view the answers of a questionnaire related to a clinic.

→ Go to profile > Actions ▾

RHEA DEL VECCHIO
#1500000172539 >

Details **Member** Questionnaire

Profile Info

Gender	Date of birth
Female	1976-12-11 (45 years old)
Primary Language	Secondary Language
English	None
Organization	
TRI-CITIES FEMALE ICE HOCKEY ASSOCIATION	↔
Branch	
-	

Contact

Primary

RD RHEA DEL VECCHIO
rheadv@gmail.com

Emergency Contact

-

→ Go to profile > Actions ▾

RHEA DEL VECCHIO
#1500000172539 >

Details Member **Questionnaire**

Questionnaire

We Are Coaches - Female Coaches

Is this your first time coaching?
Yes ✓

What MHA are you a part of? (Please spell out, do not use acronyms)
Port Moody Amateur Hockey Association ✓

Would you be interested in a mentorship opportunity?
Yes ✓

What size of tracksuit do you wear
Women's XL ✓

REPORTS – New Reports Available

Injury: Allow you to get the information about the injuries and insurance claims in the system.

Deficiencies: is now added. This report will allow you to generate a report of anyone missing a qualification. A filter will allow you to select members with or without a registration for the current season.

Team List: is now available. This will allow you to generate a list of teams per season and by status. The report include a player count and a bench staff count.

TEAMS – Criminal Records Check

CRC validation on the roster is now enabled.

The setting will now allow you to enforce that a CRC needs to be valid until the end of the season.

An error will occur if you are trying to add a bench staff that does not have a valid CRC or if it is expired/set to expire.

An icon of expired CRC will be showing when you are searching for a bench staff.

The screenshot shows a dialog box titled "Add players to TEST" with a close button (x) in the top right corner. It contains two player entries, each with a circular icon, name, ID, age, position, and a "Remove" button.

Player	ID	Age	Position	Action
IURI CUOTO	#2021100000003	18 years old	Apprentice Coach	Remove
JEAN-PHILIPPE MICHAUD	#2021100000004	18 years old	Apprentice Coach	Remove

Below the player list is a red "Errors" section with the following messages:

- Member is missing a valid CRC (members[0])
- One or more of these members is already added to this team.

At the bottom of the dialog are three buttons: "Previous", "Add", and "Cancel".

SETTINGS – Team Restrictions & Rostering

A complete guide for Team Restrictions, including definitions for each settings, and a set by step user guide for creating teams, and rostering will be sent out on Thursday.

IMPROVEMENTS

MEMBER - The list of the documents in a member profile is now sorted by the most recent document at first.

MEMBER – Deleting a suspension is now an option in the member profile. This will depend on your permissions.

MEMBER - Navigating from team to member profile and vice-versa has been improved. Within tab team in the member profile, clicking Go to profile link will bring you to the team (if the team belong to your organization).

TEAMS - The search result in the roster module as been improved to split the first name and last name and allowing you to sort each column.

IMPROVEMENTS

Team - The display of the qualification on the side panel for staff and player as been improved. The sorting is now from the most recent to the oldest.

TEAM RESTRICTIONS – Release date setting was not enabled. This is now fixed.

TEAM RESTRICTIONS – There is a new setting to validate the Jersey numbers. This setting, when enable, will make sure there are no duplicate jersey numbers on the roster. This setting can be set as a warning only or enforced.

REPORTS - The registration report was generating a timeout for MHA and branches that have a large number of records. Improved have been made to the report to ensure there is no longer a timeout error.

CLINIC REPORT - Attendee report allow you now to extract the data for all the clinics. The limited is no long set to 50.



HCR 3.0 - Newsletter

