WHOLE GAME SYSTEM

CRM CLUB AFFILIATION

Version 4.8

April 2020

Contents

Overview

Club Affiliation comprises a number of steps, with clubs providing information about their officers, teams and league/cup entries, insurance policies and purchase of affiliation products.

These various aspects will require counties to set up a number of aspects of CRM prior to affiliation, and can be summarised as follows:-

Team Setup – team setup is done automatically by the FA, with teams from the previous season being "projected" into the new season. For each club, any teams at age group U17 and above (as well as teams tagged as "Centre of Excellence) will be replicated into the new season, whilst any teams U16 or below will be migrated to an age group one year higher (note the change made for 2017-18 whereby teams aged U16 are now migrated to be U17).

For each team their default league entry will be assumed to be the same, and so will any county cup entries as long as the team is still eligible for the previous season's cup (so youth teams will generally not be retained in the same cup). Team officials will be moved along with their new team. These projected teams can then be amended/removed/added to by clubs within their affiliation form - it is important to note that this projection of teams is only intended to be a starting point for club affiliation – as far as possible reducing the workload for clubs in confirming their teams.

Calculated Products – these are also automatically set up by the FA, with each team paired up to a "Club Fee" and a "Team Fee". The club affiliation fee is comprised of the highest price "club fee" plus the team fees for all teams. These can be set as zero if required.

Club Affiliation Products – these are any other products which may be offered by counties as part of affiliation – insurances, handbooks and so forth. These products can be set as mandatory (all clubs must purchase them), additional (selected clubs must purchase them) or optional (all clubs may purchase them, but are not required to). Counties will also have to ensure the appropriate products are tagged as Public Liability Insurance Products.

Invoice Due Dates and GL Codes – for all products offered during affiliation, invoice due dates and GL codes should be provided.

Price List Items – for all products offered during affiliation (Calculated and Club Affiliation Products) counties will have to set their prices (known as Price List Items) for the new season. By default, these price list items will be copied from the previous season.

Club Affiliation Dates – counties will be required to set up their affiliation dates – when the county-wide window opens and closes, as well as functionality to open the window early for selected clubs.

Personal Accident Insurance Declarations – counties can configure the reasons shown in the Portal why clubs should or should not be purchasing Personal Accident Insurance.

Required Documents – counties can ask clubs to provide documents during the affiliation process (e.g. accounts) if required. Any documents can be tagged as mandatory or optional.

County Cup Entry Criteria – counties can also set up entry criteria for county cups – e.g. step level, age group, gender, day of play – this ensures that clubs can only see cup competitions in portal for which their teams are eligible to enter.

Team Setup and Club Access to Portal

In Whole Game System all teams are seasonal, so at the start of each affiliation window, the teams for the new season are created from the previous season's teams. Migration is run by the FA in advance of the opening of the Club Affiliation window.

This process is done automatically by the FA, with teams from the previous season being "projected" into the new season. For each club, any teams at age group U17 and above (as well as teams tagged as "Centre of Excellence) will be replicated into the new season, whilst any teams U16 or below will be migrated to an age group one year higher (note the change introduced in 2017-18 whereby teams aged U16 are migrated to be U17).

Each team in CRM has a field called "Team Predecessor" which shows where a team has been created by migration from a previous season – this will enable counties to track the progression of teams from season to season.
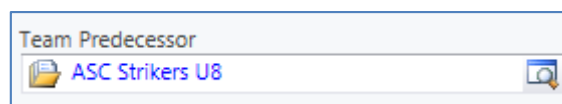
For each team their default league entry will be assumed to be the same, and so will any county cup entries as long as the team is still eligible for the previous season's cup (so youth teams will generally not be retained in the same cup. Team officials will be moved along with their new team.

These projected teams can then be amended/removed/added to by clubs within their affiliation form - it is important to note that this projection of teams is only intended to be a starting point for club affiliation – as far as possible reducing the workload for clubs in confirming their teams.

Club Secretary Access to Portal

To access the Portal, club secretaries will need to have their email address (or FAN) and password (the same password as for Members Services), so an email (or mail merge letter) to club secretaries may be wise in advance of affiliation. Use the shared view of Memberships called "**CFA Club Secretaries – Current Season**" if you need to access a list of all of your Club Secretaries. Clubs may also name assistant secretaries (as many as required) if they wish to spread the load and give access to others to the affiliation form.
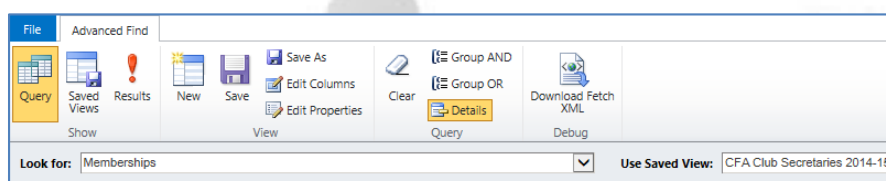
Calculated Products

Each affiliation team in CRM is matched up to a pair of products known as "Calculated Products". These products should not be amended/renamed/deleted in CRM, but counties will be required to set prices for them.

There are a total of 37 pairs of products as follows:-

1. Development
2. U7
3. U8
4. U9
5. U10
6. U11
7. U12
8. U13
9. U14
10. U15
11. U16
12. U17
13. U18
14. U19
15. U21
16. U23
17. Professional (PL)
18. Professional (CH)
19. Professional (LG1)
20. Professional (LG2)
21. NLS (Step 1)
22. NLS (Step 2)
23. NLS (Step 3)
24. NLS (Step 4)
25. NLS (Step 5)
26. NLS (Step 6)
27. NLS (Step 7)
28. Disability
29. Recreational
30. Student
31. Veterans
32. Walking
33. Small-Sided/Futsal
34. Women's
35. Saturday
36. Sunday
37. Midweek

Note the changes to these introduced in 2017-18: addition of Developmental and Walking, and moving Recreational (previously called "Friendly"), Veterans and Student ahead of the Small-Sided/Futsal fees in order of priority.

Each team is automatically matched to the **first** category in the list which provides a match (i. e. an U9, 5v5 team which plays on a Sunday) will be matched to the U9 products, because this is the first one in the list. Once a team is matched to a category, it will be assigned a "Club Affiliation Fee" and a "Team Fee" (new terminology from 2018-19) – these can be found in the "Team Finance" section for the team in CRM.
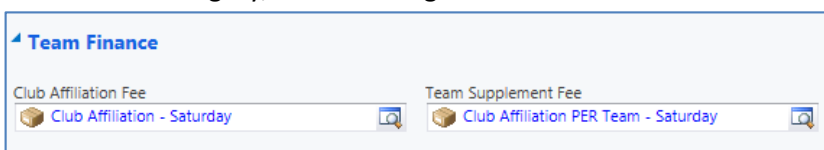
The overall fee for club affiliation will be comprised of the **highest** club affiliation fee, plus **all** team supplement fees. These can be set as zero if required to suit your county pricing model.

The thirty-seven pairs of products have been designed to provide counties with flexibility over affiliation fees whilst providing a consistent model.

It is important that counties do not delete or deactivate these products, even if you think a category may not be used by any of your teams.

These products can all be viewed using the shared view "CFA Calculated Products". There should always be exactly 75 of these products.

Club Affiliation Products

Club Affiliation Products are those products which counties may offer as part of the affiliation process **in addition** to the Calculated Products outlined above.

These products can be found by using the shared view "CFA Affiliation Products"

Products CFA Affiliation Products ▾						Search for r
Product Name	Business Organisation	Mandatory for A...	Optional Club Af...	Additional Affilia...	Is Public Liability.	
Benevolent Fund	The FA	No	Yes	No	No	
County Handbook	The FA	Yes	No	No	No	
Public Liability Insurance for clubs	The FA	No	Yes	No	Yes	
Senior Club	The FA	No	No	Yes	No	

For each county, a number of these products will have been set up by default, including eight "template" products called Product1, Product2 and so forth. These can be renamed if required by opening the product and amending the name, or otherwise should be deleted.

Adding New Products

Should there be a requirement to add a Product that is not provided for you by default, you can do so via **Football Administration** > **Roles and Products** > **New**.

Type and **Sub-Type** are mandatory fields and will populate the remainder of the form when the content is selected depending on your role and access permissions.

NOTE: There are currently three **Sub-Types** that are relevant to Club Affiliation. Each is detailed below, with the process on the next page remaining the same for each.

Type

Type *	Sub Type *	Competition Type
Purchased Product ▾	Product ▾	▾

> **Process (Standard Purchase Product): Football Administration > Roles and Products > New > Type (Purchased Product) > Sub Type (Product) > Competition Type (Blank)**

Product	Any affiliation product should be sub-type = Product. e.g. insurance policies, handbooks, equipment, badges etc.
Competition (Team to Competition)	This is used for the creation of any County Cup or Competition.
Club Affiliation Product	This is only used for "Calculated Affiliation Products" and should not be set by counties.

Merchant ID should be left blank to ensure that payments against Products are allocated to your CFA in SmartPay correctly. This will be allocated as a default for each Product. **GL** (General Ledger (Nominal)) **Code** is necessary if you wish to extract information into your chosen financial package (i.e. Sage). To create either the ID or Code, select the search icon to open **Look Up Record**. The **View** will default to either **Dept. Lookup View** or **GL Code** respectively. The option to create a **New** code is located in the bottom left side of the screen.

Token forms part of the ID and will therefore be visible in the **Product View**, however, is otherwise less relevant from the CRM user perspective. The suggestion therefore to maintain continuity, is to enter Token as Product Name without spaces.

Product Finance Code is a complimentary feature for **General Ledger Code**. If necessary, your CFA can enter an inventory code if you have an inventory item within your finance package/process.

Process: Name (Product Name) > Parent CFA (Default Setting) > GL Code (Search & Select) > Merchant ID (Blank) > Token (Name Without Spaces) > Product Finance Code (If Applicable) > Parent Product (Blank) > Issuing Organisation (Default Setting)

GL Code Process: Search Icon > New > Enter Code > Name (CFA Choice) > Business Organisation (Default) > Save & Close

Core Product: This check box should not be amended.

Price Change Allowed: Only left un-checked for Products that are standardised nationally

Mandatory for Affiliation: Any Product with this checked will default to a quantity of 1 in Affiliation for **all** clubs.

Optional Club Affiliation Product: Product will be available to select but default quantity set to 0

Additional Affiliation Product: This product will default to a quantity of 1 in Affiliation, but will only be made available to selected clubs.

*Note: affiliation products should only be tagged as **one** of mandatory, optional and additional.*

Optional Referee Registration Product: Applicable for Referee Registration module only

Optional League Sanction Product: Applicable for League Sanctioning module only

Public Liability Insurance Product: Required to 'tag' any PL Insurance Products (see note below).

*Important Note – Public Liability Insurance Products – it is important to note the difference between mandatory public liability insurance (which all clubs have to have) and tagging a public liability insurance product as mandatory. If you tag a public liability insurance product as mandatory, that forces **all** clubs to buy **that** product. The CRM affiliation process will ensure that clubs buy at least one product tagged as "Public Liability Insurance" (or provide you with evidence they have their own policy) so Public Liability Insurance products should generally be tagged as optional, not mandatory.*

The **Invoice Due Period** field (if selected) is configured on the current day plus whole number of days required, i.e. 14 for 14 days.

Invoice Due Date is included to allow a selection to accurately match your submission deadlines.

NOTE: All Products available within the Affiliation form must contain the same **Invoice Due Period**. If Products contain different lengths of time, they will generate dual or multiple invoices for the same Affiliation.

Hover Tips: Products which will appear in the Portal for clubs to select (e.g. Club Affiliation Products) can also have some text entered into the Hover Tips section – this text will then be made visible to the club user when they hover over the product in the portal, allowing counties to give fuller guidance to clubs.
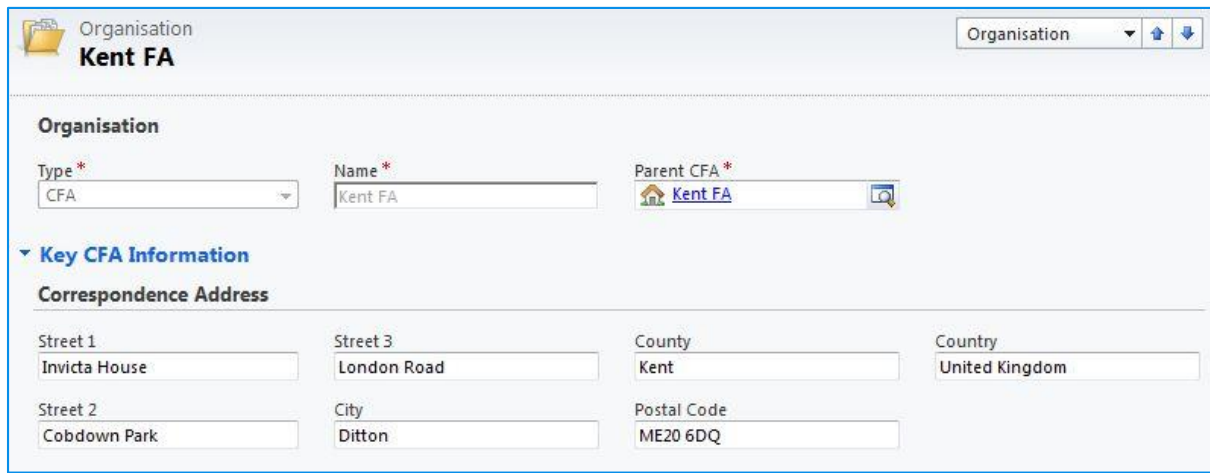
Once the Product details have been entered, you will be required to **Save** before you can **Add Price List Item**.

To access this, you will need to locate your CFA from the Organisation Views, choose your CFA link from **Parent CFA**, then change **Default Invoice Days** from **Invoicing Details**.

Additional Affiliation Products

Additional Affiliation Products are Club Affiliation Products which can be assigned to selected clubs. They are initially added to the Club, and then when the Club Affiliation Form is created, the products are included. The Club are then required to purchase the additional product.

For example, your County FA may set 'Full-Member Club' as an additional affiliation product and assign it to selected Clubs.

To set up and assign an Additional Affiliation Product, first find the product in CRM and ensure that it is tagged as **Additional Affiliation Product** and then select **Save**.

On the **Common** menu for the product, click on the **Organisations Using Additional Affiliation Products** link. This will bring up an **Account Associated View** which shows all of the clubs to which the product has currently been associated.

To add any new Club(s), click on **Add Existing Organisation.** This will launch the **Look Up Records** dialogue box. Here, you can search for and select the new clubs you wish to add the product to.

Look Up Records

Select the type of record you want to find and enter your search criteria. Filter your results and view different columns of data by using the View options. Repeat this process for different types of records.

Look for: Organisation

☐ Show Only My Records

View: Account Lookup View

Search: Canter ✕

☐	Organisation Name ▲	Membership Status	Account Number	↻
☐ 📁	Canterbury City U16			▲
☐ 📁	Canterbury City U21			
☐ 📁	Canterbury City U21			
☐ 📁	Canterbury City U8			
☐ 📁	Canterbury City U9			
☑ 📁	Canterbury College			
☐ 📁	Canterbury College First			▼

◄ ►

1 - 50 of 112 (3 selected)   I◄ ◄ Page 1 ►

Selected records:

📁 Canterbury Celtic 📁 Canterbury City 📁 Canterbury College

[Add]

[Remove]

[Properties] [New]

[OK] [Cancel]

Product
Full Member Club

📁 Clubs: **Account Associated View ▾**

☐	Organisation Name ▲	
☐ 📁	Canterbury Celtic	
☐ 📁	Canterbury City	
☐ 📁	Canterbury College	

Once you have selected the clubs required, select **OK**.

The list of clubs associated with the product will be updated accordingly. Note that clubs can always be removed from this list if required by checking their name and clicking on **Remove**.
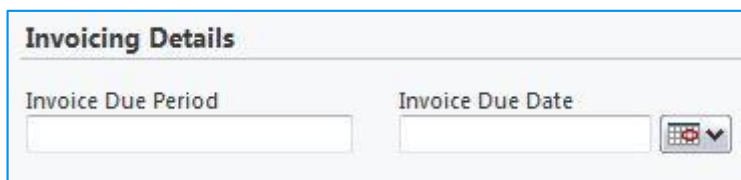
Process: Product (If Existing) > Properties > (Select Additional Affiliation Product) > Save > Common > Clubs > Add Existing Organisation > (Select Relevant Clubs) > OK > Save & Close

Invoice Due Periods/Dates and GL Codes

For all of the products you use during affiliation (Calculated Products, Club Affiliation Products and County Cup Products) you will need to ensure they have set invoice due periods or dates and also (optionally) GL Codes. These may already be set up, but should be reviewed prior to the start of each affiliation window.

Invoice Due Periods/Dates

Each product that is sold can be configured with either an Invoice Due Period (e.g. this is payable within 14 days) or an Invoice Due Date (e.g. this is payable on 30th June 2020). Only one or other should be populated.
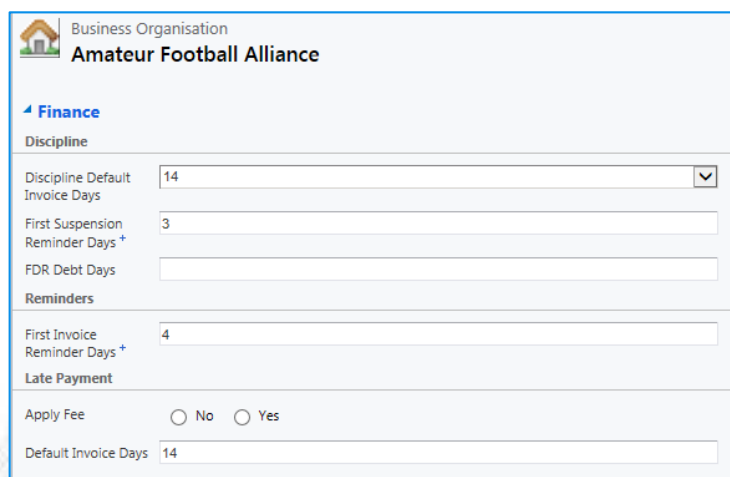
The **Invoice Due Period** field (if selected) is configured on the current day plus whole number of days required, i.e. 14 for 14 days.

Invoice Due Date is included to allow a selection to accurately match your submission deadlines.

IMPORTANT NOTE: All Products which are made available with the Affiliation form should be set with the same **Invoice Due Period/Invoice Due Date**. If you have Products which contain different lengths of time/dates, then this will cause multiple invoices to be generated for the club.

If you do not set a product with an invoice due date/period, then it will default to the "Default Invoice Days" setting which can be found within the Finance section of your Business Organisation record.
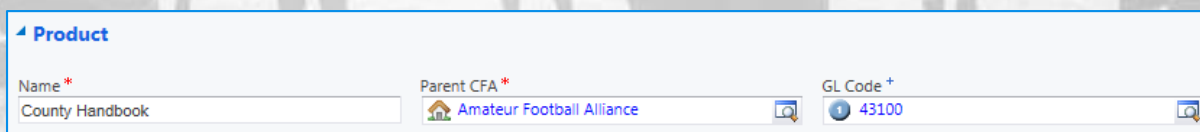

General Ledger Codes

Each product can also be set up with a GL Code (this stands for General Ledger Code, or commonly referred to as "Nominal Codes" in counties. This code is included with reports from CRM as well as any extracts you may wish to use to compare with your finance package.

Note: GL codes can be added to products after affiliation has commenced.

Price Lists and Price List Items

Counties will have a number of "Price Lists" in CRM (e.g. 2014-15, 2015-16). Each Price List contains a number of "Price List Items" which link the Price List to the various Products sold by the County. The Price List Item is the price for that product for the price list concerned.

Price List items should be set for all Products "sold" during affiliation – calculated products, affiliation products and county cup entries. Note that from season 2017-18 two new pairs of products for Development Groups and Walking Football were added and require price list items for both.

When a new season is created in CRM, we will automatically copy last season's price lists and price list items to the new season, creating a new price list and set of price list items.

Example:- A county charges £5 for a handbook during the 2019-20 season, so it has a price list item at £5. To increase the price to £6 for season 2020-21, the price list item for that season is set as £6.

Checking and Amending Price List Items from Products

To see whether a price list item has already been set for a product, simply open up the Product and under the "Common" section   on the left, click on "Price List Items".
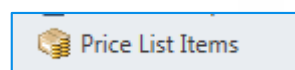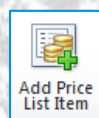
This will display all current price list items.

To edit a price list item, simply click on the line and you will be taken to the Price List Item which you can amend as required.

Adding a Price List Item from a Product

To **Add** (a) **Price List** Item from a Product, you will only need to select **Price List** and enter an amount. As you are generating from a **Product**, the other fields along with **Unit** will be populated by default.

NOTE: **Discount List** and **Rounding** are not relevant to the Club Affiliation Product model. **Pricing Method** should therefore always remain as **Currency Amount**.

Process: Add Price List Item > Price List (Search Icon) > Select Season > Product/Unit/Currency (Default Complete) > Discount List (Leave Blank) > Quantity Selling Option (Leave Default) > Pricing Method (Leave Default) > Amount (Enter Numerical Amount) > Save & Close > Refresh

Amending Price List Items via Price Lists

You can also view and amend Price List Items by going directly to the Price List. This can either be done via WGS Settings and clicking on Product Catalo, and the Price Lists, which will provide a view of all Price Lists, allowing you to select the Price List required, or you can use Advanced Find.

Once you have found the Price List required, you can open it and then click on Price List Items.

This will display all Price List Items in the selected price list, which can be amended as required, including the addition of new Price List Items.

If you wish to obtain an overview of your Price Lists, you can do so using the **Run Report** facility. Select your CFA from the **Active CFAs** View using the checkbox provided. Then select **Run Report** and choose **County Products Price List** from the dropdown for the season required.
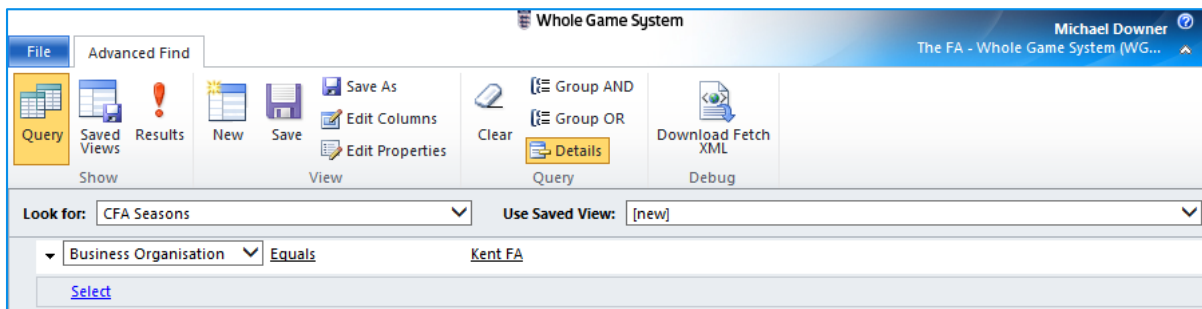

Process: Organisation > Active CFA's (View Dropdown) > (County FA Name) Checkbox > Run Report > County Products Price List > The Selected Records > Run Report > Season (Dropdown) > View Report

Club Affiliation Dates and Early Dates

Prior to the start of each Club Affiliation season, you will need to set up the dates for your Club Affiliation window. You may also set up individual club affiliation windows for selected clubs to whom you may wish to open affiliation early.

Setting your Club Affiliation Dates

Within **Advanced Find**, search for **CFA Seasons**. You may also wish to specify the **Business Organisation** (CFA) within the search criteria to ensure you retrieve the most relevant results.

Previewing the results will then provide you with the links to all season information.

NOTE: New seasons will be created for you by The FA, and once created you can then configure the dates for these seasons.

At the start of Club Affiliation, the new season will have been created for you, with the standard **Season Start** and **Season End Date**(s) entered. **League Sanction**, **Club Affiliation** and **Referee Registration Dates** will all need to be amended to mirror the criteria set by your organisation.

Club Affiliation Start Date – The first date on which clubs can affiliate

Club Affiliation End Date – The final date on which clubs can affiliate for the season

Final Submission Date – The date on which the late affiliation fee will be added – this does not prevent them submitting their affiliation fee, but does automatically add the late fee.

Process: Advanced Find > Look for: (CFA Seasons) > Select (Business Organisation) > Equals > CFA Name > Results > Select Season > Club Affiliation Dates > Save & Close

Setting your Club Season Dates

Club Season dates are optional, and give each county the option to set up selected clubs to commence affiliation in advance of the main county window. This is strongly recommended when counties are new to the CRM affiliation, as it allows them to run their first affiliations with selected clubs, rather than the full set of clubs within the county.

Within **Advanced Find**, search for **Club Seasons** and select the shared view "**CFA Club Seasons**". This will configure the view of club seasons to show only those for your County FA. You can also access Club Seasons via WGS Settings.
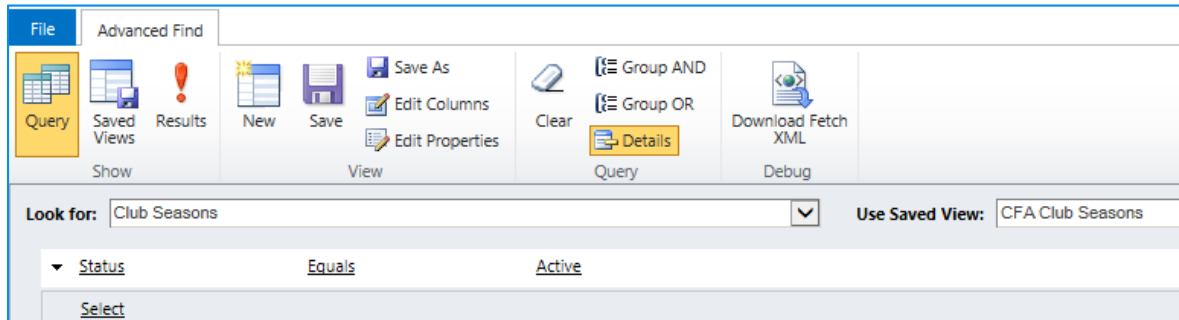
Once you have selected the view, click on Results and you can see any existing club seasons which have been set up for your County.

Any club seasons from previous years should be deactivated.

To add a new Club Season, click on the "New Club Season" button on the top left of the ribbon.
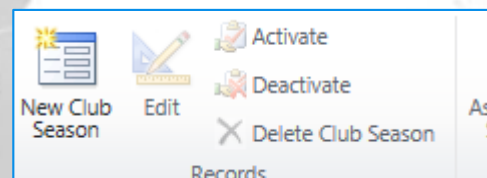
Search for the club required, set the season and set the affiliation date required for this club. Once you have completed these details, click Save.

The club selected will now have their affiliation window opened on the date selected.

Setting Your Personal Accident Insurance Declarations

The CRM affiliation process allows counties to configure the reasons why clubs may declare that they do not currently have Personal Accident Insurance, and whether they will be purchasing it at a later date.

Two options are available – an option for clubs to confirm that they do not have Personal Accident Insurance, but will be purchasing it at a later date, and an option for clubs to confirm that they do not have Personal Accident Insurance, and do not need to purchase it. One or both of these options must be set as Yes (i.e. you cannot set both to no).

Note that Personal Accident Insurance is mandatory for Adult and Youth teams playing under SCOR and SCORY, so you will need to amend the messages you have set explaining when insurance is required. Unless you have some clubs affiliating who are not required to have Personal Accident Insurance, the "Display Does Not Require Insurance" should be set to No.

Once an option has been set as Yes, then the wording provided will be displayed on the Portal Affiliation form in Step 5.

To configure these in CRM, open up the Business Organisation for your County FA and navigate to the section concerned. You may amend the wording for each section to suit your local County regulations, and can choose to hide one of the two options if required (e.g. if all clubs were required to have Personal Accident Insurance) and this wording will then appear in the Portal.

This option has been included to allow counties to configure these declarations according to their own wishes and local regulations.

Setting Your Required Documents

The CRM affiliation process allows counties to set up particular "Documents" which clubs may be required to submit as part of the affiliation process (e.g. insurance documents or club accounts). These documents may be configured as Mandatory (the club will have to upload them) or Optional (the club can optionally upload them).

Once the club have provided them, the county can then review and approve the documents as appropriate within CRM.

Prior to starting affiliation, you should review and set your Required Document Settings.

Within **Advanced Find**, search for **Required Document Settings** and select the shared view "**CFA Required Document Settings**". This will show your current required document settings.

Any Required Document Settings not required can be set as Inactive by selecting the Required Document Setting and clicking on Deactivate.

	Name ▲	Business Organisation	Document Type	Mandatory	Created On	Application Type...	Status
☐	Amateur Football Alliance - Balance Sheet and P&L - Club...	Amateur Football Alliance	Balance Sheet and P&L	No	26/02/2014 14:31	Club Affiliation	Active
☐	Amateur Football Alliance - Personal Accident Insurance...	Amateur Football Alliance	Personal Accident Insurance Certificate	Yes	26/02/2014 14:31	Club Affiliation	Active
☐	Amateur Football Alliance - Public Liability Insurance Certi...	Amateur Football Alliance	Public Liability Insurance Certificate	No	26/02/2014 14:31	Club Affiliation	Active

To add a new Required Document Setting, click on "New Required Document Setting" at the top left of the ribbon.

This will open a new window which allows you to configure the document.
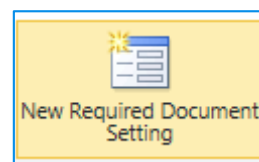
The settings you will be required to provide are as follows:-

Name – the name you wish this document to appear as (e.g. Balance Sheet and P&L).

Owner – should be amended to your CFA Club Team (e.g. Cornwall FA Club Team).

Business Organisation – select your County FA.

Application Type – should be set as Club Affiliation

Document Type – should be set as "Public Liability Insurance Certificate", "Personal Accident Insurance Certificate" or "Balance Sheet and P&L". The other options provided are for league sanctioning.

Mandatory – you only select Mandatory if you intend that clubs **must** provide this document as part of the affiliation process. Normally all of these documents will be set as optional (the insurance policies they may well be purchasing as part of the affiliation process from you).

County Cup Entry Criteria

For each of your county cups, you should configure and set up the entry criteria for the competition. These criteria settings determine which teams can see the county cups for entry in the Portal.

You should also note that all migrated teams will automatically carry over their County Cup entries from the previous season into the new season (unless their eligibility criteria – see below – are such that they cannot play in the cup competition).

To view your County Cups, go to **Football Administration** and **Roles and Products** and select the view "**CFA County Cups**".
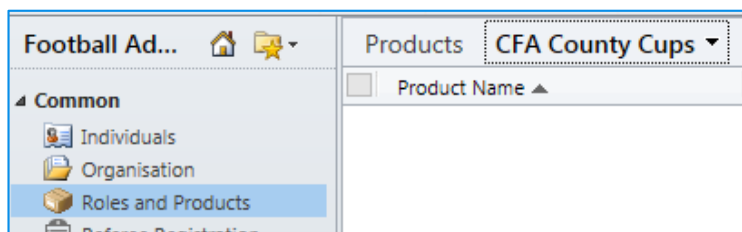
This will then produce a list of all County Cups set up for your County.

To configure, a County Cup, click on the cup concerned to open up the Product which is the County Cup (note that as it is a product, it can have an associated Price List Item, which is the entry fee for the cup competition).

Once the cup product has been opened, you will see a number of sections:-

Type (Purchased Product), Sub-Type (Competition – Team to Competition), Competition Type (County Cup) and Is Template Product should **not** be amended – these define the product as being a County Cup.

The **Name** can be amended as required, as can the **GL Code** (see previous section on GL Codes). **Issued By** and **Parent CFA** should be set as your County, and **Parent Product** and **Merchant ID** should be left blank. **Token** can be anything – we'd suggest the same name as the County Cup. If shown, **Season** can be ignored (do not worry if it is a previous season).

Is Secondary Affiliation Required should only be set as Yes if you allow entry to the cup for teams from other counties, and you require them to purchase your Secondary Affiliation Product as part of their cup entry. There is no requirement in CRM that teams from outside counties have to have secondary affiliation to enter your cups.

Price Change Allowed should be ticked, and **VAT Rate, Invoice Due Period** or **Invoice Due Date** should be configured as outlined earlier in this guide.

Start Date and **End Date** are optional, but may be populated with the starting and ending dates of the current season competition.

Is Senior County Cup – should be checked if the competition is the most senior county cup you run.

Regionalised – should only be ticked if you run a regionalised county cup, and this will require further configuration to specify which clubs can enter the competition.

Qualifying Fixtures – should be ticked if the county cup fixtures are used for serving disciplinary suspensions.

Sponsor and **Appointed to by MOAS** – are internal flags which you can set if required.

Not-Active Next Season – flags that the cup will not run for the new season, and will not appear in the Portal.

Eligibility

The second section of the County Cup is the eligibility section, which is where you can restrict which teams will be able to see the cup within the Portal.

Lower Age Group and Upper Age Group – is used to specify the ages which can enter a cup competition. Lower and Upper may be the same, or may be different to cater for two-year band youth cups, or adult cups (e.g. these may span U19 to Veterans).

Lower Team Rank and Upper Team Rank – these may be left blank (in which case all teams can enter) but if populated can be used to specify First team only (rank = 1), or Reserve Teams (rank =2).

Team Category, Team Gender, Team Disability – should be set as required. If you want a cup to be open to Mixed teams, leave the Team Gender blank.

Day of Play – this is important to note – the day of play settings are the day on which teams normally play to be eligible for the cup competition – i.e. if the cup is open to Saturday and Sunday teams both should be ticked. It is **NOT** the day on which the cup is played (so if you run a midweek cup competition for Saturday sides, you should be ensuring Saturday is ticked).

Competition Football Levels – each cup must have at least one competition football level. This is used to configure which levels of the football pyramid(s) can enter the competitions. Although most cups will be set as Non-NLS, if you wish to set a cup as Step 4 to Step 6 for example you can do so.

Only One Team Can Enter Per Club – if this is ticked, then once one team from a club has entered the cup competition, it will be closed to others.

Teams Meeting Criteria Must Enter Competition – if this is ticked, entry to the competition is mandatory, and teams cannot remove themselves from the cup in the Portal.

One Team Per Cup – if this is ticked, then once a team has entered this cup competition, they will be prevented in the Portal from entering any other County Cups (from the same County FA) regardless of any other eligibility criteria (this option allows counties to ensure that a team will only enter one competition, even if they may be eligible for different cups).

Entry By Division – if this is ticked, then only teams (remember these are the teams for the new season, so this will be dependent on their division being correct within the relevant League Sanction form) which are in specified divisions will be able to enter the cup competition (subject to any other entry criteria which may also be applied to the cup).

Once a cup has been set with "Entry by Division", navigate under "Common" to "Eligible League Divisions" – this will list any divisions whose teams will be eligible to enter this cup competition.
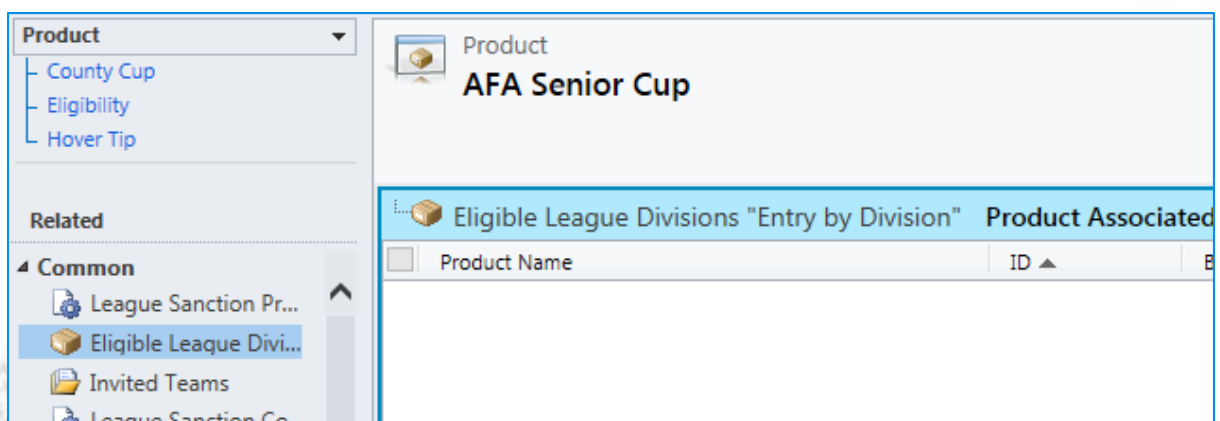
To add a new division to this list of eligible divisions, first make sure that the "Eligible League Divisions" box has been highlighted, and then click on the Add Existing Product link at the top left of the County Cup. Once the lookup appears, select "League Divisions" as the view and you can then search for the divisions required for the cup competition.
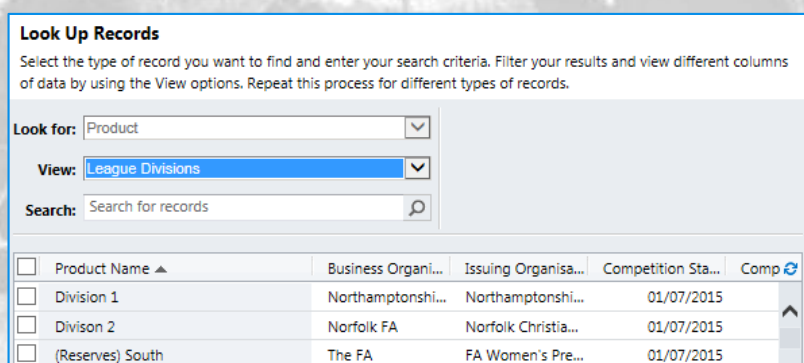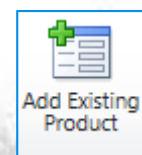
Once the divisions have been added for the cup, they will appear in the grid of "Eligible League Divisions".
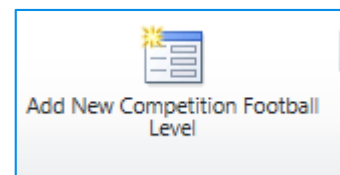
Competition Football Levels

Each cup competition will also need to be configured to define which Competition Football Levels are eligible to enter the competition. At least one level should be entered for each competition. Note that if a competition spans a number of Competition Football Levels, all of these should be input (e.g. if a cup is open for teams from Steps 3 through to Step 6, then you need to add Step 3, Step 4, Step 5 and Step 6).

The current Competition Football Levels are shown in a grid. To add a new Competition Football Level, click on the grid and check that it has been highlighted in blue.

On the top left of the ribbon the button marked "Add New Competition Football Level" will be activated.

Click on this to launch the New Competition Football Level screen.

Add the level of football which is to be added for this cup competition
(the name will be automatically populated when you save), and click Save (or Save and New if you need to add further levels).

The new Competition Football Level will be added to the cup competition.

To remove a Competition Football Level simply check the level to be removed and click on "Delete Competition Football Level".
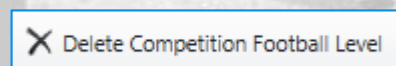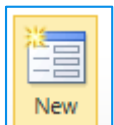

The level(s) selected will be removed from the cup competition.

Regionalised Cups in Whole Game

Whole Game includes optional functionality for counties to define "regions", to which clubs can then be assigned. These regions can also then be assigned to cups, and this will mean that only teams from clubs within those regions will see these cups in the Portal. This functionality will only be used if a cup has been tagged as "Regionalised".

To add a new region to Whole Game System, navigate to WGS Settings and under Extensions, go to Regions (alternatively this can be found using Advanced Find).

This view will list all regions which have currently been set up within Whole Game System.

If you need to add a new region, click on the New button.

When you add the new region, name it and also make sure you add your County and then click Save (or Save and New) if you wish to add another.

Once the region has been created, clubs (not teams) can be assigned to the region. From the club record, navigate to Key Club Information and use the lookup to assign a region to the club.

To view all clubs assigned to a region, open up the region concerned.

To assign a cup to a region (or regions) navigate to the cup product, and click on Competition Regions under the Common tab.
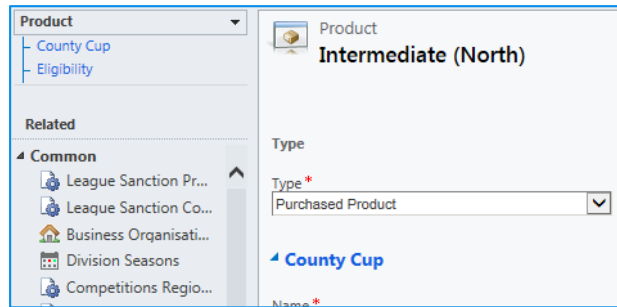
This will bring up the view of Competition Regions currently associated with the Cup Competition.
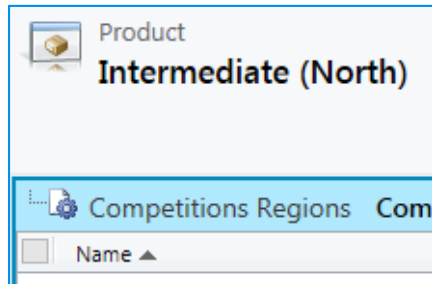
To add a new Region to the Cup Competition, click on the "Add New Competition Region" button
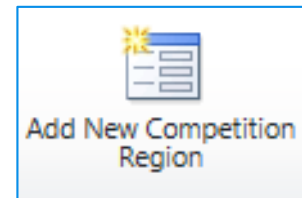
Once added, the cup will only be visible in the Portal to clubs that are set within that region.

Note that if no regions have been set for a cup, then it will be made available to all clubs throughout the county.

Late Entries

Cups can be set with entry dates (opening dates and closing dates on which entries can be made in Portal). This allows counties to close entry to teams after a set date, whilst still keeping the affiliation window open.

Open up the cup concerned and then from the Common section click on "Competition Seasons". Select the "Competition Season" required and the "Application Start Date" and "Application End Date" fields can be used to limit when the cup will appear to clubs
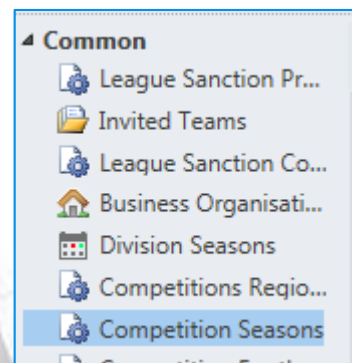
 If these dates are left bl ank, the cup will be displayed in the Portal regardless of the date.

If you wish to override these dates and allow late entries into the cup, then open up the cup product (not the competition season) and check "Yes" for "Allow Late Entry".

Opening Cups to Teams from Other Counties

Whole Game System also allows functionality for counties to open up their cup competitions to teams from other County FA's, and to specify which counties' clubs can enter these cups. This includes an option to require the clubs concerned to take secondary affiliation from the county who are running the cup (it is not a requirement for entry of the county cup).

To open up a cup to teams from other Counties, open up the Cup Competition Product and navigate to the Common tab and select Competition Eligible Counties.

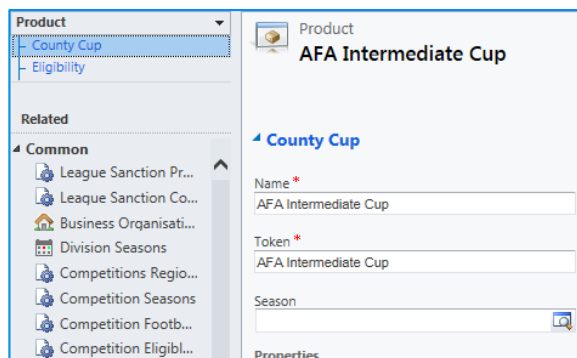This will bring up a view which will show all counties which have currently been enabled to have their teams enter the cup.

To add a new county to the list of those whose clubs are eligible to enter the cup competition click on Add New Competition Eligible County and you can select the county whose clubs you wish to add to the cup.
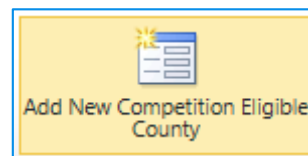
If you do open your cups to teams from other counties, then you should note that you will need to configure a separate price list and price list items – this will be called Out of County Price List for your County FA.

Additionally, you will need to decide whether secondary affiliation is required for clubs whose teams enter your county cups. If the cup is tagged as "Requires Secondary Affiliation" then in addition to paying the cup entry fee, the club will also be charged a fee for your Secondary Affiliation product, so ensure that the Price List Item for that has been set.

Invitation Cups

County Cups can be tagged as "Invitation Cups" in CRM. If a cup is an Invitation Cup, then it will not appear to teams in Portal unless they have been specifically invited to enter the cup competition. Using the Invited Teams link in the Common section on the Cup, you can see which teams have currently

been invited into the Cup and new teams can be added by using the Add Existing Organisation button available once the view of "Invited Teams" has been selected.
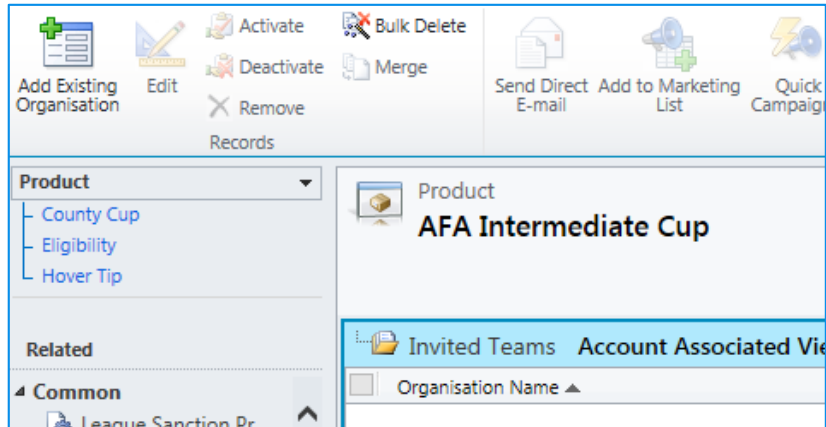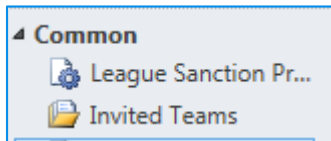
New Cups

If you need to create a new county cup go to a view of "Roles and Products" and click on "Add New". The Product Type should be "Purchased Product", the Sub-Type is "Competition (Team to Competition)" and the Competition Type is "County Cup". Ensure you also name it, and record your County FA as the Parent CFA.
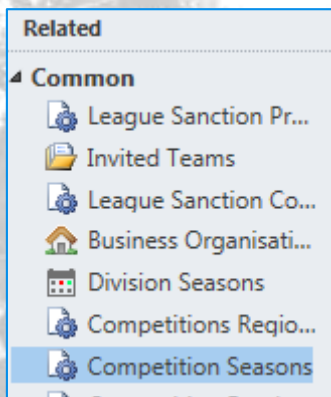
Once you have created the cup, you will also need to ensure that it has a "Competition Season" (e.g. 2020-21 season).

From the Common menu on the left, click on "Competition Seasons" and if there is not already a competition season for the current season, use the "Add Competition Season" button to add the new season for the cup.
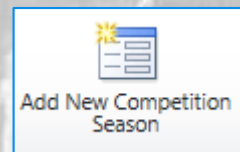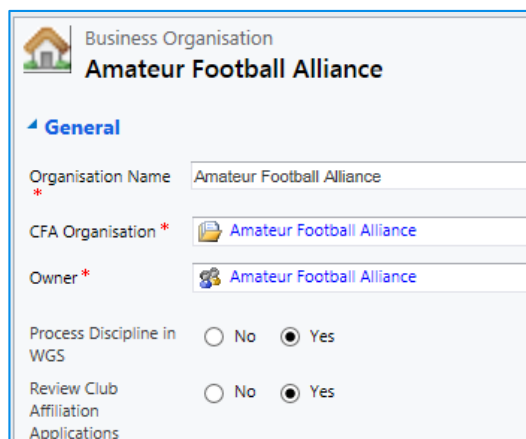
Club Affiliation – Invoicing on CFA Approval

Counties have the option of specifying that clubs will not be invoiced immediately when they submit their club affiliation applications. This option has been included, because a number of counties felt that they wished to review applications before clubs were invoiced and made payments.

This option is controlled by opening up the County FA Business Organisation record and setting the "Review Club Affiliation Applications" option to "Yes".

If this option is selected then when the Club submits their affiliation form to the County FA, the "Affiliation Status" of the form will be set to "Ready for Review" and invoices will not be generated for the club (if the option is not selected, then the Affiliation Status will be set to "Submitted and Invoiced" with invoices automatically generated.

Once the County have reviewed the Affiliation Form, and set the Affiliation Status to "Submitted & Invoiced" then the invoice will be generated for the club, and can be paid within the Portal. The County can then set the Affiliation Status to "Approved" once they are ready to do so.

Club Affiliation Links, Creating and Printing Club Affiliation Applications

This section details how to create a club affiliation form in CRM and takes you through the format of club affiliation applications in CRM.

You do not need to create affiliation applications for every single club – if the affiliation window is open for a club (see previous section) then they can create their own affiliation form via the Portal. However, you will need to create the affiliation form in CRM if you wish to enter affiliation data direct into CRM, or generate a printed affiliation form.

Note that since season 2019-20, any club affiliation forms which have not been created by early June will be automatically created, to reduce any load on the system during July and August. Clubs will not be impacted, and will simply see their form has been pre-created.

Once the affiliation application has been generated, you can also access it by clicking on the affiliation button – this will not create a duplicate affiliation application.

Club Affiliation links for both the Current and Next Season are located on the top navigation ribbon within each Club record.

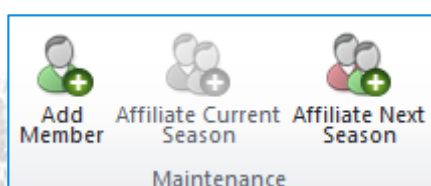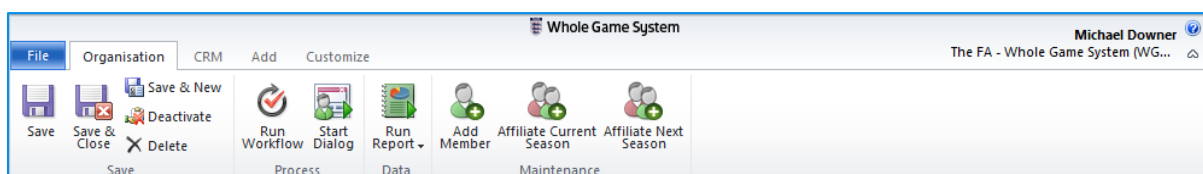 If the option to Affiliate for either season is unavailable, this will be because the current date is outside of the start/end dates you have set. To amend this information, you must update the affiliation window as detailed in the previous section.

The Affiliation application will be created if it doesn't exist already and will automatically open.

If you wish to print the affiliation form off (e.g. to send to a club by post) then select "Run Report" from the club affiliation form and select "Club Affiliation Form".
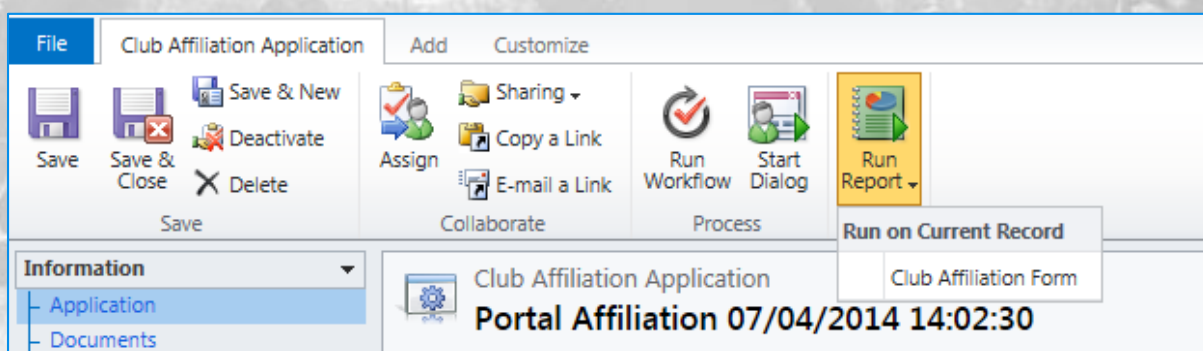
This will generate a PDF document which you can then print off.

Club Affiliation Application Form in CRM

When a club affiliation form is created, CFA, Club, Season, Affiliation Status and Payment Deadline will automatically be set to the default values.

Application Form Received allows you to register the receipt of a completed form and pause the timer against the late fee date. e.g. if you should receive a completed form on the final day before the late fee is applied but are unable to complete the process within CRM on the same date, using this will allow you to log that the form is received without the Club incurring any additional fee.

At the top of the screen, there are fields called "Accept Suspended Officials", "Allow CRC in Progress" and "Accept Club Debts". You should leave these set as "No" until approving the affiliation form, at which point backgrounds checks are made as follows:-
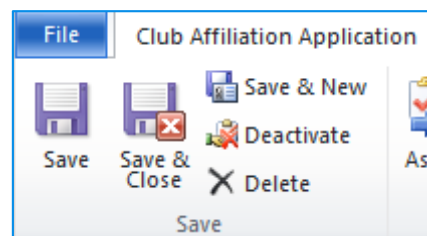
If you try and save the Club Affiliation Application with one of the named officials having a current suspension (of any type) you will be alerted that this is the case. You should then check the individual and their suspensions to see whether this prevents them from being named as an official – assuming it does not, check the box marked "Accept Suspended Officials" and the affiliation form can be progressed.

If you try and save the Club Affiliation Application with one or more youth team officials (Manager, Coach, Assistant Manager, Assistant Coach, Goalkeeping Coach, First Aider or Physiotherapist) without a current DBS (CRC within CRM), i.e. CRC Expiry Date in the future, and the CRC Status being "Accepted" or "Pending", then you have the option to approve the affiliation form if these individuals have a DBS Check in progress, and the status of this is currently "Submitted to DBS", "DBS Acknowledged", "Disclosure Complete" or "Dispute". To do so, check the flag marked "Allow CRC In Progress" and the validation will be extended accordingly.

If you try and save the Club Affiliation Application as "Approved" with the club having outstanding invoices (not including affiliation or county cup entry invoices) you will be alerted that this is the case. You should then check the club's outstanding invoices to see whether you wish to proceed – if you wish to proceed check the box marked "Accept Club Debts" and the affiliation form can be progressed.

Once a form has been saved, it will continue to be available each time that the link is selected. To create a new form, you must first **delete** any existing one within Club Affiliation Application. The system will then remove any existing Affiliation data and prevent the action being undone. Newly created Products will only appear in newly generated forms.

Club Details will contain mandatory roles and **Club Sponsor** details if applicable. Each role field is linked to a search facility to replace if required. For each named individual, you can also record whether this role is voluntary (defaulted to Yes). You can also record the number of volunteers who are involved in the running of the club (this is expected to be an approximate value).

Note that for the nominated Club Officials, if a club has been marked as "Professional DSO Required" (this is set by the FA), then the club will have to nominate a Club Welfare Officer (even if the club concerned does not have any teams U18), and that individual does not have to have attended the FA Welfare Officer Workshop.

For Youth clubs (i.e. running one or more team aged U18 or below) validation will also ensure that the Secretary, Chairman, Treasurer and Welfare Officer have completed the **Safeguarding for Committee Members** online course (a club affiliation form cannot be set as Approved without all these officials having had the course recorded on their individual record – note that Treasurers also have to complete this course for season 2018-19).

Club Sponsor is a free text field.

Premier League CRC Check – this section will also include two fields under the heading of Premier League CRC Check. This section can be ignored for any club outside of the Premier League. However, the clubs in the Premier League (whose CRC checks are processed separately from the Football Association) will be required to fill this in as they will make a declaration that they will ensure that all their relevant club and team officials have valid CRC's.

Portal gives the club a checkbox to complete, and this will populate the two fields below with the name of the person completing the affiliation form and the date they made the declaration.

Club Grounds can also be added to the affiliation form. Under "Common" and "Grounds", general club grounds can be added to the club record…

…and then from the list of club grounds the Main Ground (Club Ground 1) and Training Ground (Club Ground 2) can be populated via the Club Grounds section.
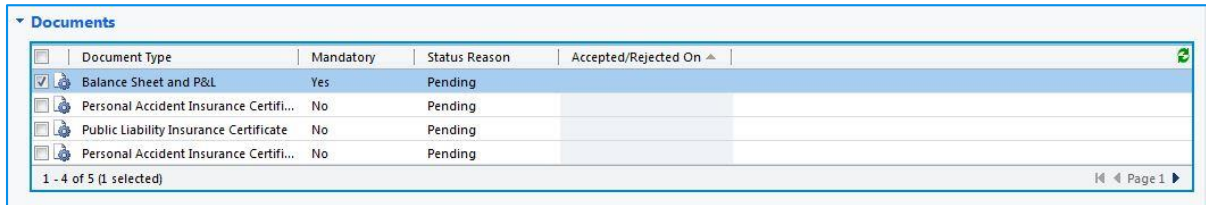

The insurance section will detail whether the Club has their own Public Liability and Personal Accident insurance. If the Club do not have their own Personal Accident Insurance, you must additionally check to confirm that they will be covered for the season stated.

Club Affiliation Application – Documents
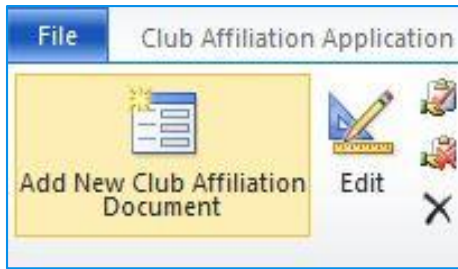
To add any Public Liability or Personal Accident Insurance documentation/certification, you will need to highlight the Documents section before then selecting an item and choosing **Edit**.

NOTE: If you choose to Add New Club Affiliation Document, this will be applicable only to the individual Affiliation.

▼ **Documents**

	Document Type	Mandatory	Status Reason	Accepted/Rejected On ▲	
☑	Balance Sheet and P&L	Yes	Pending		
☐	Personal Accident Insurance Certifi...	No	Pending		
☐	Public Liability Insurance Certificate	No	Pending		
☐	Personal Accident Insurance Certifi...	No	Pending		

1 - 4 of 5 (1 selected)   ⏮ ◄ Page 1 ▶

You must the click into **Notes** and '**Add a new note**' before selecting **Save**. Once you have saved the note, you will be able to double click on the yellow pad icon to open in a new dialogue box. Here you will be able to browse to the file from either your machine or a shared folder.
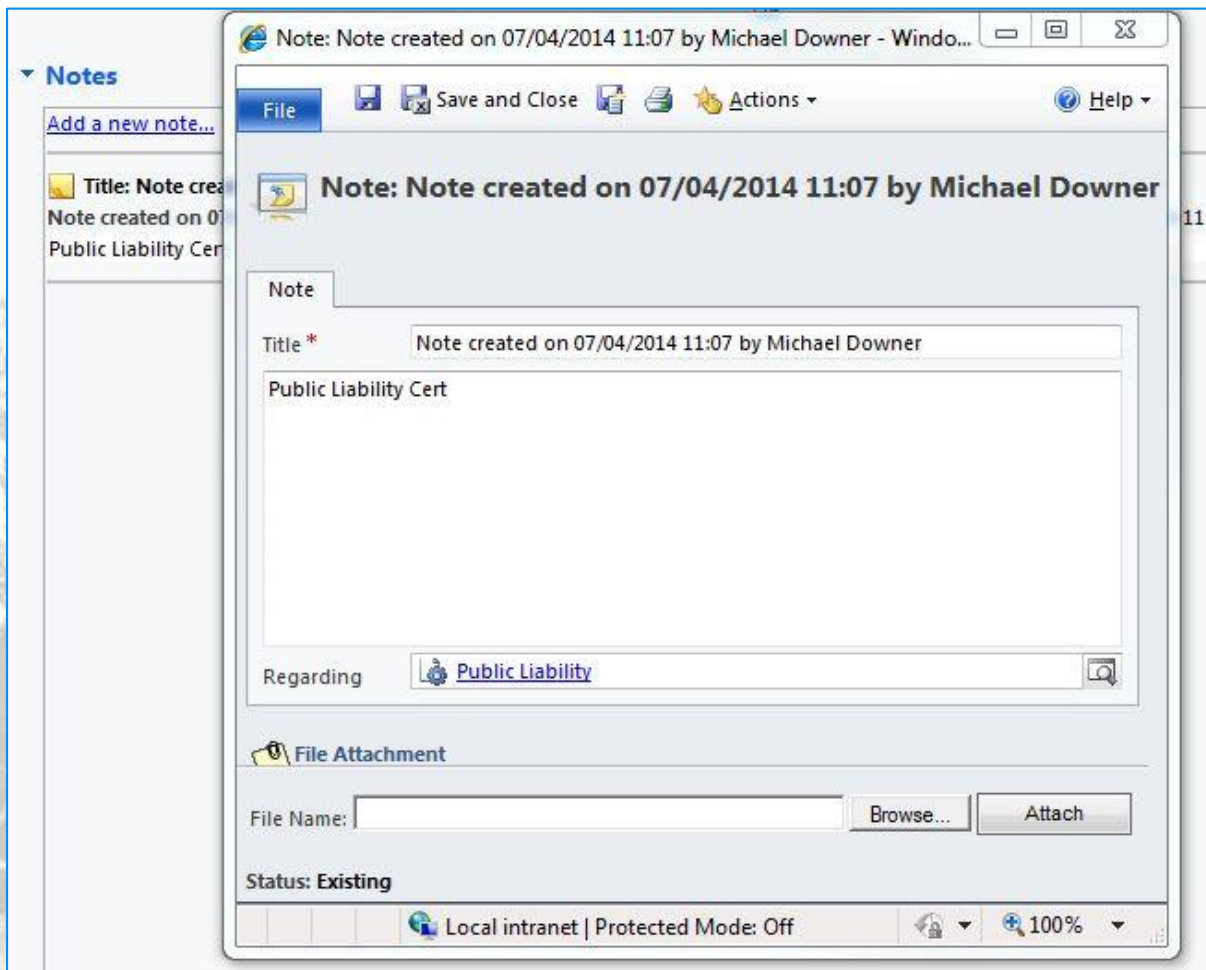
You must then set the **Status Reason** of the document to **Accepted** before selecting **Save & Close.** If you do not set the document as **Accepted** at this stage, the system will not allow you to **Approve** the Affiliation process.

| Status Reason | Accepted ▼ | Accepted/Rejected On | 01/04/2014 | ▦ ▼ |

NOTE: The standard upload file type that we will be using is PDF. PDF files are condensed, thus reducing the amount of data on the system and assisting long term performance and reliability.

> **Process: Documents > Choose Line > Edit > Notes > Add a new note... > (Enter Note Description) > Save > Double Click Yellow Note Icon > File Attachment > Browse > Attach > Status Reason (Accepted) > Accepted On (Enter Date) > Save & Close > Repeat As Necessary**

If you wish to add, edit or remove an item from all Affiliation forms (such as Balance Sheet and P&L) you can do so using the **Advance Find** feature and '**Look for:**' Required Document Settings.

After selecting Results, you can add a **New Required Document Setting**, or **Edit/Delete** an existing one by selecting the box aligned to each team and activating the **List Tools** ribbon options.

Club Affiliation Application – Adding Teams

To include any team, either New or Existing, you must ensure that you select the **Team Details** section by clicking within the box to highlight as below. The **List Tools** ribbon will then become available and allow additions, filtering and export options.

Opting to **Add New Club Affiliation Team** will provide a blank form to complete. It will also present the option **Save & New** to allow multiple Teams to be entered. Once completed, you will need to refresh the **Team Details** section in order to see the most up-to-date content.

Since season 2017-18, "age groups" of U5 and U6 were added. This is to allow counties to capture details of U5 and U6 Development Groups within affiliation. The reasons being:

- Many clubs organise development groups to support their recruitment of U7 teams for the following seasons
- Previously these were either not included them in the affiliation, which bypassed any safeguarding processes or
- They were named in the affiliation form and incorrectly placed in to typically the U7 age group. (397 teams had U5 or U6 in their title in 2016/17)

Clubs should be clear that these age groups cannot play fixtures and cannot be placed in leagues.

Since season 2017-18 teams may also be categorised with age group = "Walking Football". These teams will pick up the new pair of products for Walking Football.

Folding Teams – Also introduced in 2017-18, where a team is marked as "Active Next Season = No" (in Portal the club which check a box called "Team Folding") at least one of the reasons provided must be checked to confirm the reason why the team is folding (more than one reason may be provided).

NOTE: Each Season the CRM system will automatically amend age groups and Suffix (Red, Blue, Green etc.) from the previous year. Thus, an U13 Team in 2019-20 will become U14 in 2020-21.

Grounds: Each team may also have a Playing Ground (Primary) and Training Ground (Other) select. You must always **Save** once you have completed **Grounds**, otherwise you will not be able to apply any **Team Officials** or **Competitions**.
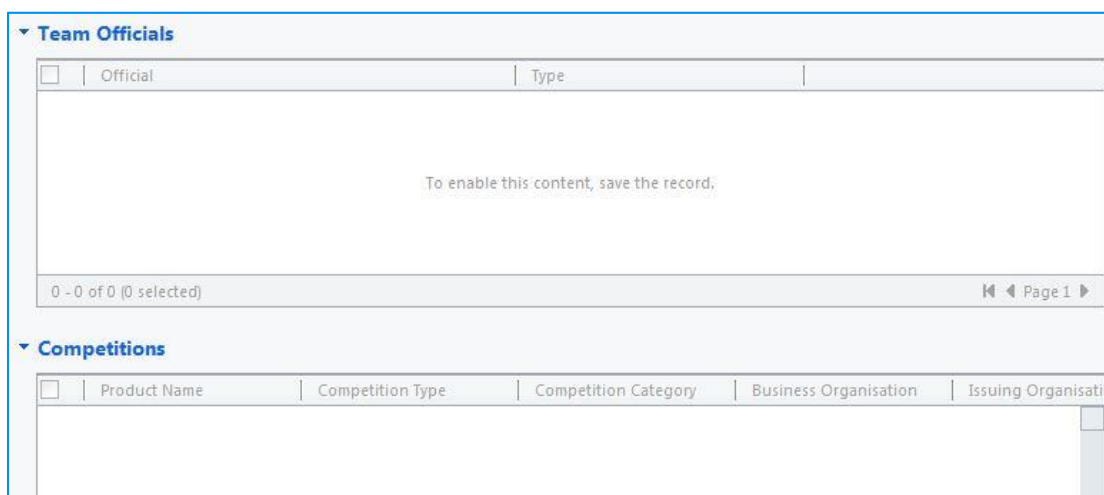
The reason for this is that until you save the Team record, there is nothing existing to allocate any individual or competition against. Once you select to **Save**, the **Club Affiliation Team** name will be present, and you will be able to access **Team Officials** and **Competitions**.
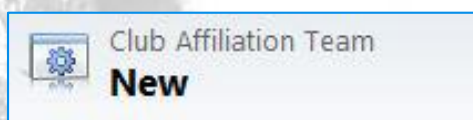
Selecting the **Team Officials** section will provide the option to **Add New** or **Add Existing Club Affiliation Team Official**. Here you simply select the FAN record for the individual and enter the role **Type** from the dropdown menu. Any team officials added will be checked for suspensions in the same way as for club officials.
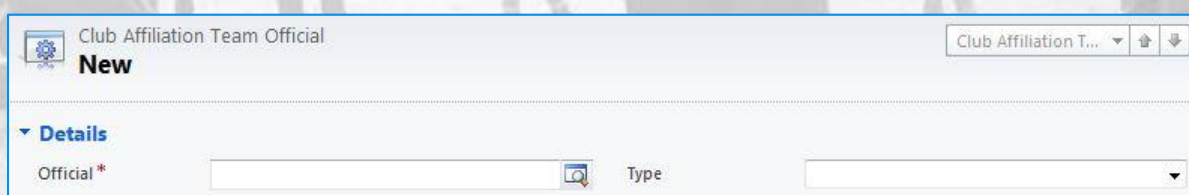
Youth Team Official Validation

There are a number of validations checks in CRM which reflect The FA's Safeguarding requirements for team officials in youth football.

If the team is aged U5 to U18 or is categorised as being a Wheelchair team CRM will validate that a **Manager OR Coach** has been named for the team (one or other or both must be named). Note also that no individual can be named as manager or coach (including assistants) for more than four youth teams across all clubs   this has been extended to cover roles across all clubs with which the individual may be associated, and also to include the assistant roles).

As a response to the unprecedented impact of the Coronavirus on football operations we have made the following temporary changes to support the administration of club affiliation for the 2020/21 season*:

1. We have lifted the requirements within CRM to enable CFA to affiliate Teams where:
   a. A Coach / Manager and / or assistant does not hold an in-date accepted DBS *(designated CRC within CRM)*
   b. A CWO does not hold an in-date accepted DBS
   c. A CWO has not completed the relevant safeguarding training (SCW, WOW and online SCM).

NB. For the avoidance of doubt, these requirements are being lifted purely so that clubs can affiliate and coaches and CWOs must have an accepted DBS prior to carrying out their roles.

2. Extended the requirements for renewals of DBS certificates that expire between 1 March and 1 October 2020, by 12 months. This will affect approximately 40,000 renewal checks, if all these individuals re-engage with football when it restarts.

These arrangements will remain under review throughout the 2020 /21 affiliation period and are subject to change once football restarts. Any changes will be communicated through The FA's normal channels with Counties.

The validations covered above do not apply if the team has been marked as being "Is School". This may be set in CRM, but cannot be set by the club in Portal. Any teams marked as being a School Team will not be covered by FA DBS Checks and should be covered by the School's own Safeguarding Policy.

This section will also allow you to record other team roles such as Full-Time Email and Full-Time SMS Contact, but these roles are not subject to the DBS checks.

Remember that in CRM you can only have one **Manager** per Team. Any form submissions with more than one **Manager** will require additional individuals to be set as **Assistant Manager**. This will not impact on your KPI figures. The same validation occurs with **Coach** and **Assistant Coach** - only one main coach is permitted per team.

Finally note that all of the team roles captured may also have the "Is Volunteer" flag set, to record that the role is being fulfilled on a voluntary basis.

Note also that validation will be performed to check that the Club Secretary, Chair, Treasurer and Welfare Officer have completed the online Safeguarding Committee Members workshop.

County Cups

To add a team to a County Cup, you should use the **Add** an **Existing Product**. From here you will be able to choose both Cups parented to your County FA and those made available by others.

Club Affiliation Application – Product Quantity

If you wish to change the quantity of a Product, you must again ensure that you select the section to highlight. Then either double click the Product Name/Line or tick the box next to the Product name and select **Edit**.

NOTE: Like any hyperlinked element within Whole Game System CRM selecting the name of the Product with a single click will open the parent record and configuration for that item.

Once in the **Club Affiliation Product**, the **Unit Price** cannot be changed as this is set by the parent record (Product (as above)). **Quantity** may be amended by simply changing the number present in this field and choosing **Save & Close.** You must then refresh **All other products** for **Sub-Total** to display accurately.

NOTE: Benevolent Fund amount should set at £0.01 which will allow you to enter bespoke amounts.

Process: All Other Products (Select Area) > Double Click Product Text/Line > Quantity (Change Number) > Save & Close > Refresh All Other Products Box

NOTE: For mandatory items, the quantity cannot be amended to zero. Attempting to change this will result in a system error.

Club Affiliation Application – Cups - Parent and Non-Parent

Parent County Cups and **Non-Parent County Cups** (those not owned by your CFA) are generated by Competition selection when adding and confirming Teams above. Thus, the only key element here is to set the **Cup Entries Status** as these are invoiced separately from the main Club Affiliation and as such have their own status dropdown.

NOTE: Whilst Eligibility is locked in the WGS Portal (i.e. for the end user), it is not in CRM. It is therefore possible for a male team to be put into a female cup for example. It is therefore worth using this section to validate during the Affiliation process.

Club Affiliation Application – Status

The final step of the manual Affiliation process is to set the Status Reason to Submitted & Invoiced. There are separate statuses for the Club Affiliation and County Cup sections, so you have the option of invoicing these at separate times. You must then save for the changes to take effect. Navigating away from the page without saving will not implement your changes.

Club Affiliation Application – Late Affiliation Fee
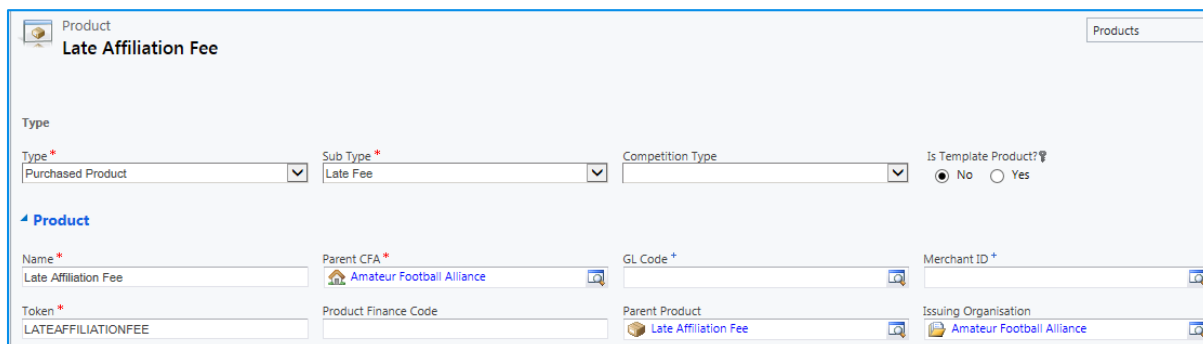
Each county also has a Late Affiliation Fee product automatically set up for them in CRM. You can find it using Advanced Find and searching on Product Name. The product should not be amended, except to configure the invoicing details, GL Code and VAT Rate if required.
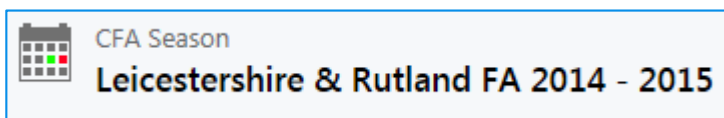

The late affiliation fee is added as a separate invoice to any Club Affiliation Application if the affiliation has not been invoiced **and** paid after the deadline you have set in your Club Affiliation Dates window.
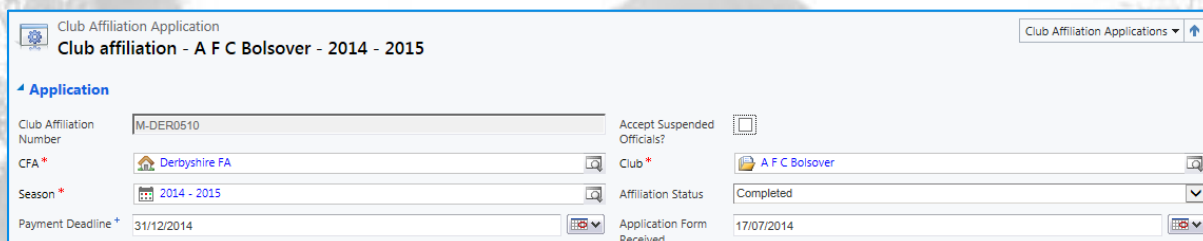
If you have clubs who submit their affiliation form prior to the late fee deadline, but you will not be able to approve their affiliation form until after the deadline has passed, then ensure the "Affiliation Form Received" field is populated with the date you received the form – if this is before the Final Submission Date, the late fee will not be added for the club.

If you do not wish to apply any Late Affiliation Fees on a county wide basis, simply set the Final Submission Date to the same date as your Club Affiliation End Date.

Reminder - If you do use the Late Affiliation Fee, make sure you have set it up within your Price List in the usual way.

Club Affiliation Application – Finance

Once an Invoice has been raised (either through the Portal or CRM it will be available in two places within the Affiliation model. It will be navigable in the main form body, but also in the Common menu. Either will enact the Invoices menu, but the primary menu item will allow more lines.

There are separate invoices generated for Club Affiliation and County Cup entries, so that counties have the flexibility to invoice these (or require payment) at different times.

To make a payment of an invoice from CRM, select the invoice concerned as above and click on "**Make Payment**" (you can also multiple select invoices to make payments in one go).

Select the relevant Invoice line followed by Make Payment. You will be shown the Total Amount and a breakdown of each Product being purchased. You will then be given a number of options for payment method.

#		Title	Invoice No	Total Amount	Outstanding Balance
0		Club Affiliation per Team - Sunday Football...	INV-KEN000072	£246	£246

Created On	Line Item #	Status	Payment Value
15 Jan 2014		Pending	15.00
15 Jan 2014		Pending	74.00
15 Jan 2014		Pending	0.00
15 Jan 2014		Pending	117.00

Total £ 157.00

Process: Invoices > (Select Invoice) > Make Payment > (Select Payment Items/Values) > How would you like to Pay (Choose) > (If Card) Enter Card Details > Pay

Selecting Card will present the Barclays SmartPay platform branded with your CFA logo and headline. The Total payment amount will be primary and once the details are entered the interface will automatically identify card type.

Club Affiliation Application – Payment Confirmation

Once the payment has been taken, you will be able to check the Outstanding Balance on the Invoice as below. If the Outstanding Balance is zero/null, the Invoice will be locked, and no amendments will be available to you.

Once the balance is cleared, you must then remember to alter the **Affiliation Status** of the form to **Approved**.

Club Affiliation Application – Post Invoicing Amendments

From season 2018-19 onwards, new functionality was added to the CRM affiliation form to allow counties to make changes to affiliation forms after they had been invoiced, which is designed to cater for the addition of new teams during the affiliation window, but also after the affiliation form has been completed where a club may wish to add additional teams during the season.

Counties should use this new functionality for the addition of new teams, as the Club Affiliation form processing will include all of the functionality around validation of teams and team officials for Safeguarding in Youth Football. This replaces the previous methods of either adding new teams and creating separate invoices through Product Manager, or having to re-invoice the whole affiliation form and then issue credit notes against selected items.
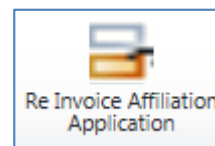
This functionality allows a county to make the changes required, and then generate a new invoice for the club, which will only include any affiliation fees which have not already been invoiced for the club. This button can only be used for an affiliation form which has the status of "Submitted and Invoiced", "Approved" or "Completed". If the affiliation form does not have this status the Re Invoice Affiliation Application button will be greyed out.

Once the process has completed (note that this may take a few minutes) a pop-up will appear confirming that this has been done. Do not refresh the screen whilst waiting for this to complete.
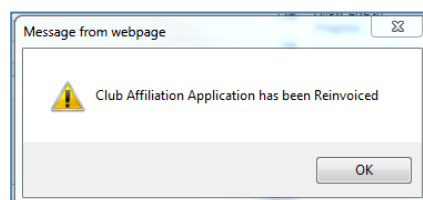
On re-invoicing, the following processes will be carried out:-

- Validation will be performed of "Accept Club Debts" (note that this is more likely to be triggered during the season, so be prepared to mark this check box and save the affiliation form before running the re-invoicing).
- Validation of club officials, other teams, club affiliation documents will not be performed on using the re-invoicing functionality - this is only done when the affiliation form is "approved" by the County user.
- The affiliation form will temporarily be set back to Ready for Review, then to Submitted and Invoiced and (if appropriate, Approved). None of this will be visible to the user, but this can be seen via audit history.
- If the affiliation form had been "Completed", then it will be updated to "Approved", but then from "Approved" to "Completed" automatically overnight, making the relevant teams, team officials and competition entries Active (any existing teams will be unchanged).
- The same process will be performed for any County Cup entries, allowing for addition of these after the affiliation process has been completed.

Note that you should not use the affiliation form for the following:-

- Changes to team officials for "active" teams (use the dialogue "Add Official" from the Organisation Record)".
- Changes to club officials for "Approved" or "Completed" affiliation forms (use the dialogue "Add Official" from the Organisation Record)"
- Changes to leagues for "active" teams (use the dialogue "Add Team to New League" from the Organisation Record).

Club Affiliation Application – Validation

If you are creating a manual Affiliation via CRM, you will validate the form as you update the Club record and progress through the Affiliation form. If the Affiliation has been completed via the Portal, the status will be changed to Submitted & Invoiced, thus waiting for validation and Approval.

To locate **Submitted & Invoiced** records, you should select **Football Administration** followed by **Club Affiliation Applications** as below, using the View most applicable to you, likely **My CFA Club Affiliation.** This also highlights the importance of accurately setting the **Affiliation Status**.
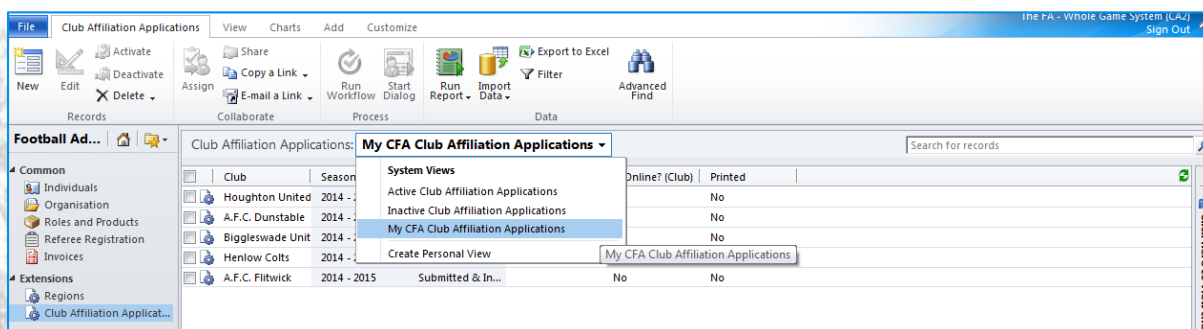
NOTE: As previously documented, to access the Affiliation, you must either double click the name or select the area to the right. Selecting the linked text will take you to the Club record.

As Portal payment is not compulsory, all completed forms will be marked as Submitted & Invoiced. Once the form has been checked, including the balance due, Approved can be selected.

In Progress: Form created and saved but not yet Submitted

Submitted & Invoiced: Either completed via Portal or CRM and awaiting validation/payment

Approved: Manually set by CFA.

NOTE: Approved items will automatically change to Completed once the Season is in progress (this normally occurs on 1st July). You can run the Advanced Find as above to confirm this once the season start date has passed.

Club Affiliation Application – Generation of Affiliation Number

A club affiliation number will be generated for a club when the Club Affiliation Application has been set to "**Approved**" (this may then automatically be set to Completed, if the date is after 1st July) and the flag **"Affiliation Paid"** has been set as Yes.

This flag, "Affiliation Paid" is automatically set to "Yes" when all club affiliation invoices have been set as Paid, but it can also be set to "Yes" manually by the County FA in CRM, in which case the Club Affiliation Number would be generated automatically, assuming the affiliation application has been approved (this option gives counties the discretion to generate affiliation numbers even if invoices are outstanding, and the invoices for the club's affiliation will remain unpaid, and can be separately tracked by the County.
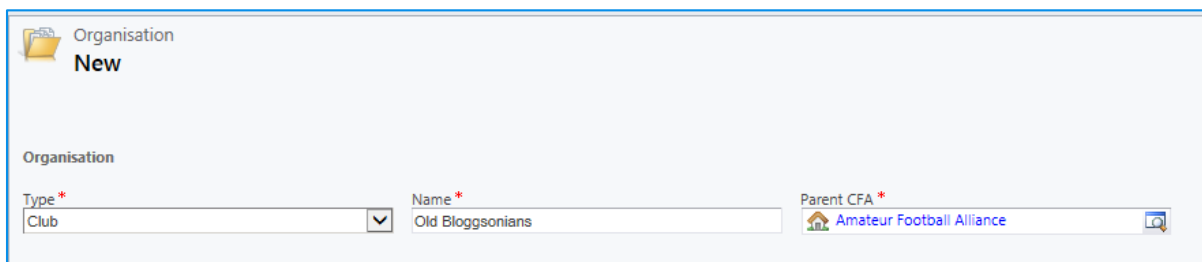
Note: it is important to note that no affiliation number is generated until the County FA have set the affiliation status to "**Approved**" in CRM – clubs cannot get an affiliation number without County approval first.

This process will also mark the "Last Season Affiliated" field on the club record, which allows a county to easily monitor whether a club has affiliated for the new season.

New Clubs

If you need to add a new club to Whole Game System, simply go to a view of Organisations, and click New. Then create an Organisation with Type = Club, the name of the new club and select your County FA as the Parent CFA, and then Save.

Once the club record has been created, you will need to use the Add Member button to give the club a Secretary, Chairman and Treasurer (all three roles must be assigned, but they can be the same person).
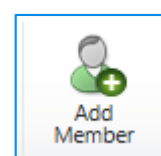
Once the club has been created, the Affiliation Form can then be used (either in CRM or in the Portal) to allow the club to add their teams, managers and all other details.

Marking Teams who also Play Futsal

From season 2018-19, functionality was also added to mark a team which plays Futsal during a part of the season. This should not be used for teams which are "Futsal only" (these should be categorised as Futsal) but where a team plays it part of the season (for example during the winter months, or periodically during the season).

To mark a team as "also plays Futsal" navigate to the Organisation Record for the team, and the Type of Team section.

The flag "Also Plays Futsal" should be checked accordingly.

Appendix A – Preparation for Affiliation Checklist

1. **Calculated Products (page 5)** – check all are present – do not delete or deactivate. Do not change fields other than the GL Code and invoicing fields.
2. **Club Affiliation Products (page 6)** – configure any products you offer in Club Affiliation additional to the Calculated Products – set each one as optional, mandatory or additional. Remember to set Hover Tips for these products.
3. **Public Liability Insurance Products (page 8)** – ensure these have been correctly tagged as Public Liability Insurance Products, and as Optional for Club Affiliation
4. **Additional Affiliation Products (page 10)** – if used, ensure these are set up and matched to appropriate clubs as required.
5. **GL Codes (page p12)** – create any new GL Codes required for Affiliation and County Cups
6. **Products - Invoice Due Periods/Dates and GL Codes (page 12)** – set invoice due periods/dates for Calculated Products, Club Affiliation Products and County Cups. Ensure the invoicing periods/dates are consistent.
7. **Price Lists and Price List Items (page 13)** – set all price list items for Calculated Products, County Cups and any other products offered during affiliation.
8. **CFA Season Setup (page 16)** – check that the dates set up for Club Affiliation in CRM are correct (we recommend you don't set the "Opening Date" until the day you start affiliation, so you open the window whilst staff are in the office.
9. **Club Affiliation Early Dates (page 18)** – set the dates for any clubs to whom affiliation is opened before the main Affiliation window.
10. **Personal Accident Insurance Notes (page 19)** – make sure the required wording has been set for when clubs may or may not require Personal Accident Insurance (**note that all youth teams have required to have Personal Accident Insurance since 2017-18**).
11. **Setting Required Documents (page 20)** – ensure any documents set for clubs to upload as part of affiliation are correctly configured
12. **County Cup Eligibility (page 21)** – set up eligibility criteria for County Cups in CRM
13. **Secondary Affiliation and County Cups for outside teams (page 28)** – set due dates and price list items for secondary affiliation and cup entries for teams from other counties (if required).
14. **Option to set Club Affiliation Invoicing on CFA Approval (page 30)** – decide whether you want to have club affiliation invoices generated immediately on submission by clubs, or delayed until counties have reviewed affiliation forms.

Appendix B – Price List Items for Calculated Products

Remember to check the Club Affiliation Fee price **AND** the Team Supplement Fee price.

Make sure all prices have been set (even if zero).

Product	Club Fee	Team Supp.	Product	Club Fee	Team Supp.
Development	£	£	U7	£	£
U8	£	£	U9	£	£
U10	£	£	U11	£	£
U12	£	£	U13	£	£
U14	£	£	U15	£	£
U16	£	£	U17	£	£
U18	£	£	U19	£	£
U21	£	£	U23	£	£
Premier League	£	£	EFL (Championship)	£	£
EFL (League One)	£	£	EFL (League Two)	£	£
NLS (Step 1)	£	£	NLS (Step 2)	£	£
NLS (Step 3)	£	£	NLS (Step 4)	£	£
NLS (Step 5)	£	£	NLS (Step 6)	£	£
NLS (Step 7)	£	£	Disability	£	£
Recreational	£	£	Student	£	£
Veterans	£	£	Walking	£	£
Small-Sided/Futsal	£	£	Women's	£	£
Saturday	£	£	Sunday	£	£
Midweek	£	£			