FAQ | *Cheat sheet for QRL Club Rollout conducted by Tidy Champions*

Prepared by Nat Ng, TidyConnect Onboarding Specialist

ACCOUNT QUESTIONS

What can the League and/or QRL see from within my tidy HQ license?

The only things that the league can see are:
- The name and email address of people you have allocated to a role within your TidyHQ account
- The answers to project tasks that you submit to them
- Comments within the Discussions tab of a Project Task that you have selected to send to "project organisers and my club"

The QRL State level licence cannot see anything at all of your account, with the exception of Referee's Associations which are also connected to the QRL State licence - in which case, the above applies.

What exactly is my club entitled to as part of what's been paid for by QRL?

QRL has paid the set up and connection fees for each account and for a basic TidyHQ licence for 3 years. This gives your club:
- Automatic access to the basic apps of TidyHQ (Contacts, Communicate, Finances, Tasks, Web Pages)
- Access to the Projects app to allow you to communicate with your League
- 200 emails per month able to be sent via the Communicate app (if you choose to use it)
- Ability to restrict permissions for administrators to various parts of the platform - this feature is typically only available on the full Pro plan
- Access to any TWO of the additional apps listed in the "Apps" section of TidyHQ (eg Shop, Meetings, Events, Storage)

What if my club wants to use more than 2 extra TidyHQ apps or needs more emails etc?

You will need to contact Nat from TidyHQ to discuss upgrading your plan at the club's cost. The current cost of the full licence is $890 per year.

I've got some 'technophobes' on my committee that might struggle with all the things TidyHQ can do. Any advice?

We know that part of the beauty of Tidy is that it can do everything! But that can be a little intimidating at first. We recommend using permission settings to restrict what these committee members can see when they login. When you set them up as an administrator, just tick the box next to "Tasks" so they can see the "All Projects" and "Tasks" apps and that's all. This will stop their view from being overwhelming at first, and you can slowly increase their permissions as they get more familiar with the system. For more information on permissions, check out this article:
https://support.tidyhq.com/en/articles/76497-what-are-admin-permissions-how-do-i-change-them

ADMINS & ROLES QUESTIONS

I haven't received my login to TidyHQ.

1. Please double check your junk mail folder as sometimes the invitation gets directed there if it's your first communication from TidyHQ.
2. If you know someone else from your club with access, please ask them to either resend your administrator invitation or use the "+Invite Admin" button to add you if you've not been sent an invitation previously.
3. If steps 1 & 2 don't work, contact your Region's TidyHQ Champions for further assistance.

This is what the email will look like for reference:
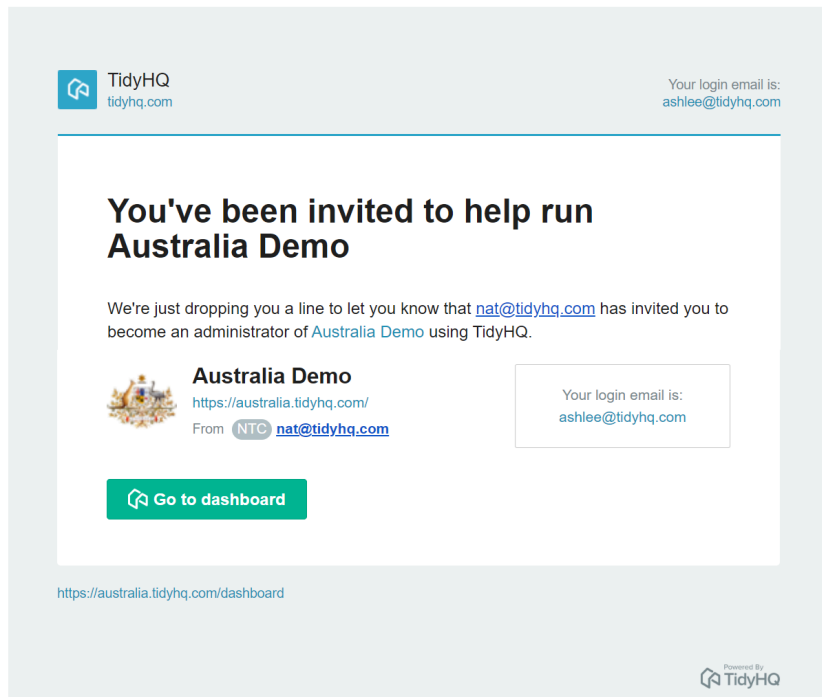
I need to remove an administrator who shouldn't have access to my account.

Go to Admins & Roles, find the administrator's name and click "Delete Admin". The only administrators you won't be able to remove are yourself, and those delegated as the Organisation Account Owner. If the account owner needs to be removed, please contact support@tidyhq.com for further assistance.

Do I have to use my personal email address as my administration login? Or can I use a generic club email address?

It is strongly recommended to use your personal email address as your login because it is much easier to remove your level of access when it is no longer required. If a generic club email address is used, you will need to change the name associated with the account every time the role experiences turnover, as well as change the login password etc.
Using your personal email address also allows you to be across several different TidyHQ accounts at once, should you play or volunteer for more than one club or sport that uses TidyHQ.

There are lots of Roles pre-loaded into our account that we don't use, what should I do?

Click the name of the Role and then click 'delete'. The name of each Role is completely at your club's discretion, so you can add, edit or delete as much as you like.

Can our club have more than one person allocated to a Role?

Technically the answer is yes, you just type multiple names into the "pick an admin" field when you're editing the role.

HOWEVER, we strongly caution AGAINST this because it goes against the principle of accountability for making sure action items etc get done. If two people share a role within Tidy, it becomes difficult for them to know which one of them needs to complete allocated tasks, which one might be chairing a meeting or responsible for one of it's agenda items etc. If you DO have two people sharing a role on your committee, we recommend creating two roles for them instead (eg Vice-President #1, Vice-President #2) so it's very clear who is responsible for what.

PROJECTS/TASKS QUESTIONS

What happens if I click "ignore" to a project our club has been sent?

The project invitation will pop up again the next time an administrator from your account logs in. Keep in mind, the project organiser at your League can see which clubs have accepted the invitation, which clubs still have it as 'pending' (meaning they haven't responded at all), and which clubs have hit the 'ignore' button, so do so at your peril!

Why do I have to click into each project task to be able to see its due date and who has been assigned to it?

The Projects App within Tidy is constantly improving based on customer feedback. The ability to see this information within the Tasks tab of a Project has already been requested and is in their pipeline for development.

For now, we recommend you go to the Tasks App and look at the "All Tasks" tab as it will show you (in due date order) which Tasks are required and who has been assigned to them.

Why can't I allocate someone to a project task?

Tasks are allocated to Roles rather than people. So if you're typing in someone's name in the "Assign To" field and they don't appear, chances are they have not been allocated to a Role in TidyHQ. You will need to go to "Admins & Roles" and allocate them to a Role before trying to assign the task to them.

CONTACTS APP QUESTIONS

Does TidyHQ integrate with MySideline?

There is an integration built and being tested right now, we are in the process of getting final sign off. Once this happens, we will connect up each account and all of your players registered in MySideline will automatically be created as a Contact in your TidyHQ account.

What's the difference between a Contact and an Admin?

Think of your Contacts App like the club's address book. It should contain records for each individual or organisation you want to make sure you have details for, such as suppliers, sponsors etc. These individuals will NOT have access to the Admin Dashboard or any of your TidyHQ features. To enable them to use your TidyHQ licence, you need to add them as an Administrator using the "Admins & Roles" button. More information on how to add administrators can be found here:

https://support.tidyhq.com/en/articles/76542-step-3-add-administrators-to-your-organisation

COMMUNICATE APP QUESTIONS

What is the cost to send an SMS through TidyHQ?

The cost per SMS is $0.061 per message. You can find out more by reading the support article on this topic:

https://support.tidyhq.com/en/articles/5521658-send-an-sms-text-message

FINANCE APP QUESTIONS

Does TidyHQ integrate with Xero or MYOB?

There is an integration with Xero in beta-testing at the moment, so we can turn it on for selected customers. However, this would count as one of the 2 additional Apps (aside from the standard apps) for your TidyHQ account, so please keep that in mind when requesting this integration be added to your account. For assistance with this, please contact support@tidyhq.com

How are payments processed in TidyHQ?

TidyHQ uses Stripe as our payment gateway. Your organisation will need to have a Stripe account, then go to the Finance Settings section in TidyHQ and follow the prompts to connect your Stripe account to your TidyHQ account. [This article](#) can help with how to do that.

What are the transaction fees associated with payments through TidyHQ?

For clubs on our TidyConnect basic plan, the transaction fees are 4.75%+50c per transaction (this includes both the fees paid to Stripe and to TidyHQ). For clubs who choose to upgrade to the full Pro Plan, transaction fees drop to 2.75%+50c per transaction.