spooorts.coach docs

DOCUMENTATION

User Guide

for spooorts.coach

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Overview – spooorts.coach

spooorts.coach is the all-in-one platform for sports coaches, personal trainers, and fitness professionals. Your own website, your own app, online booking, athlete management, and finances — all in one free solution.

What is spooorts.coach?

You reach the main areas via the top navigation: We → Training → Shop → Contacts.

spooorts.coach is a cloud-based platform that gives sports coaches, personal trainers, fitness coaches, and instructors a comprehensive toolkit for their daily coaching business. In just a few minutes you can create your own coach website with an integrated online booking system where athletes book training sessions and pay directly. On top of that you get a free management tool for athletes, schedules, bookings, and finances.

The platform is hosted in German data centres. spooorts.coach integrates seamlessly with spooorts.club and spooorts.events: training sessions you create can automatically appear in your club's calendar and at sports events.

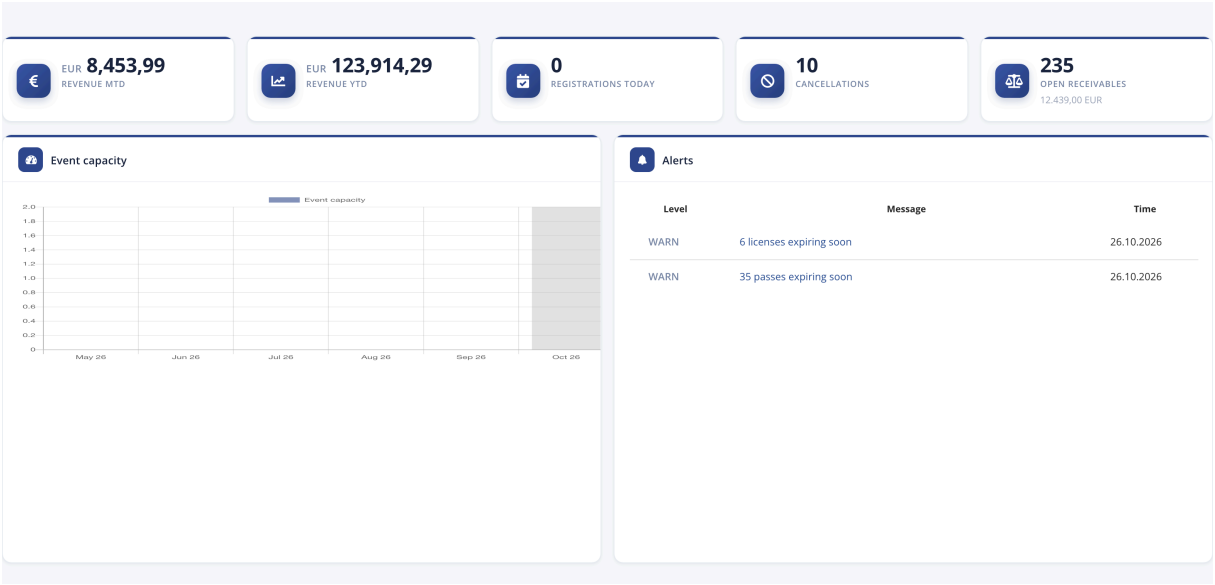


Figure 1: View in the administration area

Who is spooorts.coach for?

- **Personal Trainers** — individual coaches offering 1-on-1 or small-group sessions who need a professional online presence with booking functionality
- **Fitness Coaches** — trainers running group workouts, bootcamps, yoga, Pilates, and similar class formats
- **Club Coaches** — coaches at sports clubs who want to digitally manage their training groups, attendance, and communication
- **Martial Arts Instructors** — coaches for boxing, MMA, judo, karate, and other martial arts with belt gradings and structured courses

- **Dance and Gymnastics Instructors** — choreographers and instructors with recurring course blocks and performance dates
- **Sports Schools and Academies** — facilities with multiple coaches, rooms, and an extensive course catalog

Key Features at a Glance

- **Own Website & App** — create a professional coach website in your own design with a custom URL (e.g. mycoach.spooorts.de) as a Progressive Web App or even as a native iOS and Android app
- **Online Booking System** — athletes book training sessions directly through your website or app, choose date, time, and session type, and pay instantly online
- **Training Planning** — create recurring sessions, one-off lessons, courses, and camps with flexible scheduling and capacity limits
- **Athlete Management** — all athletes, their bookings, attendance records, progress, and contact details at a glance — GDPR-compliant and exportable
- **Communication** — push notifications, emails, and an in-app messaging system for direct and group communication with your athletes
- **Payments & Finance** — online payments, invoice generation, financial overview with revenue, expenses, and DATEV-compatible export
- **QR Code Check-in** — digital attendance tracking at the training venue via QR code scan through the spooorts app
- **GPS Tracker** — in the Max plan: built-in GPS tracker for running, cycling, and outdoor activities directly in the app

Quick Start

1. Sign up for free at spooorts.coach.
2. Choose your sport and upload your logo and banner image.
3. Create your first training session with date, time, and price.
4. Share your personal coach URL — athletes can book immediately.
5. Manage bookings, athletes, and finances through the free dashboard.

> **Tip:** spooorts.coach is completely free on the Start plan — no monthly fees. Only a 5 % service fee applies to online payments.

Integration within the spooorts Ecosystem

spooorts.coach is part of the spooorts ecosystem and works seamlessly with the other platforms:

- **spooorts.club** — training sessions automatically appear in the club calendar; club members can book directly through the club app
- **spooorts.events** — link training events with tournaments and competitions; participants from events can be imported directly as athletes

- **spooorts App** — athletes use a single app for club, event, and coach content; push notifications and calendar integration included

Setup assistant

The assistant gets your website ready in four steps: who you are, offer & price, website & app, ready.

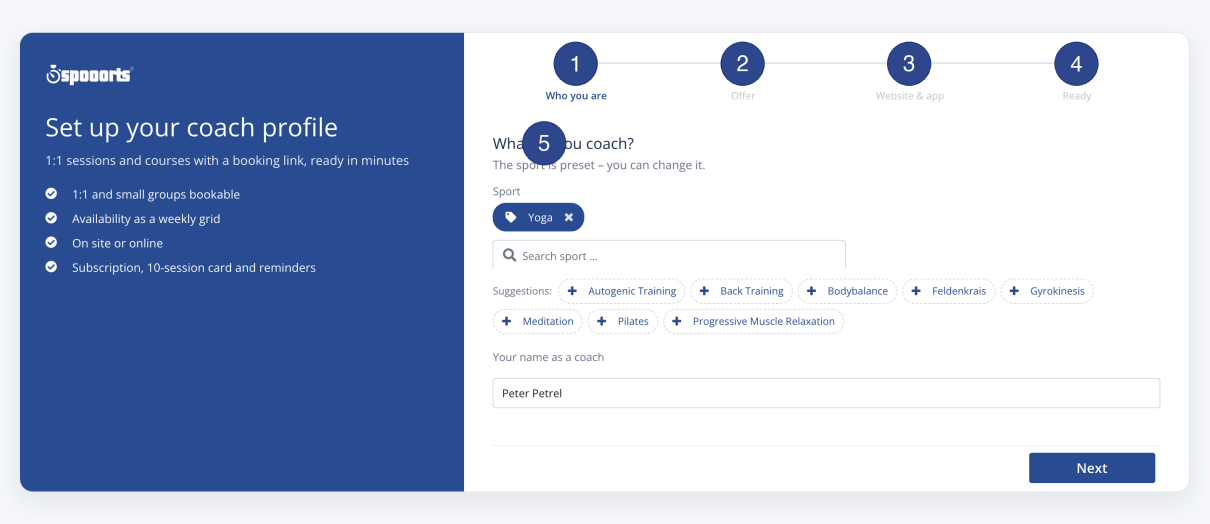
Overview

You can restart the setup assistant any time.

On first start the **setup assistant** guides you through the basic setup in four steps. The four steps appear as a progress bar at the top; the current step is highlighted. **Next** moves to the following step.

The assistant also opens from the "Get started" buttons on the spooorts marketing sites – sport, type and language are then preset.

The four steps



1	Step 1 – Who you are / Your event
2	Step 2 – Offer & price (fees, courses, places or categories, depending on the type)
3	Step 3 – Website & app
4	Step 4 – Ready
5	The current step with its input fields

Figure 2: The setup assistant with the four-step bar

Who you are / Your event	Choose the sport and give a name; for events also date and location.
Offer & price	The first offer and the prices – fees, courses, places or categories depending on the type.

Website & app	Web address (subdomain) and the website package.
Ready	A checklist leads you into the relevant screens to finish the setup.

Ready checklist

The **Ready** step shows this checklist. Completed items are ticked, open ones lead to the relevant screen:

- Profile & location
- Availability
- Session type & price
- Payment method set
- Stripe verification completed (payout active)
- 10-session card
- Subscription & membership
- Sessions & reminders
- Intake form
- Set cancellation terms
- Publish the schedule on website & app (marketplace listing)

Payment method and Stripe verification are set up under Payment methods & payout.

Tip

> **Tip:** You can run the assistant again at any time via **Next** and the progress bar; already saved entries are kept.

Dashboard

The dashboard gives you a quick overview of your sales, registrations and key metrics at a glance.

Overview

You find this page in the menu under **We** > **Analytics**.

The dashboard is the home page of your spooorts Manager. At a glance you can see the most important metrics for your events: revenue from ticket sales, product sales and registrations. The bar chart shows the trend over the last six months.

From the home page you jump into the related detail areas with one click — for example from a revenue figure directly into the financial evaluation or from the registrations into the participant list. The dashboard thus serves both as a situation overview and as a

navigation aid. The displayed figures update automatically, so that when you open it you always see the current status without having to generate reports manually.

Which tiles the dashboard shows depends on your permissions, so each role sees the figures relevant to it.

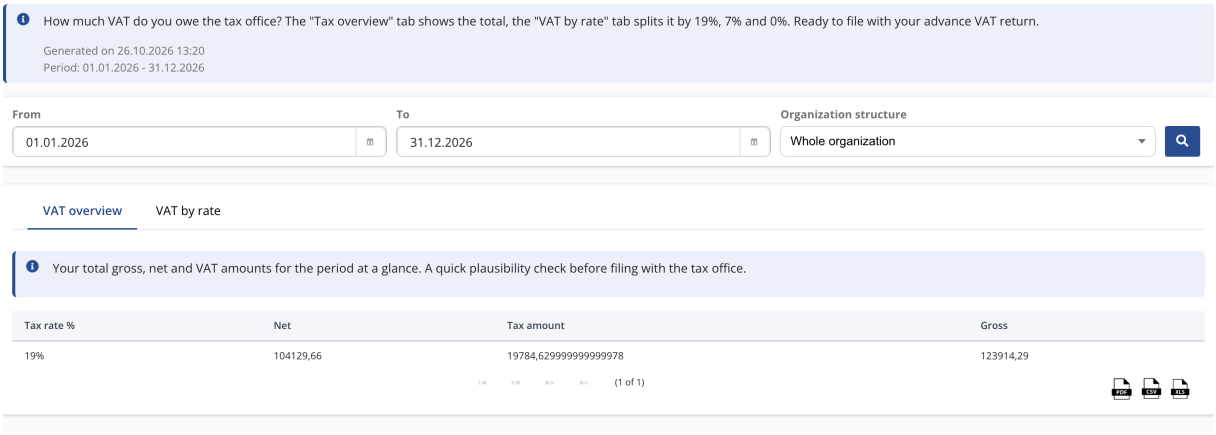


Figure 3: View in the administration area

Sales Chart

The central bar chart displays your monthly revenue graphically. You can switch between three views:

- **Total Revenue** – All income summarised per month.
- **Product Sales** – Only revenue from the shop (merchandise, equipment etc.).
- **Ticket Sales** – Only income from registrations and entry fees.

The default period covers the last six months. You can adjust the period freely using the date filters.

Quick Actions

The toolbar on the dashboard gives you direct access to the most important functions: create a new event, manage contacts or adjust settings. This saves you the detour through the navigation.

Tips

- Check the dashboard regularly to spot trends in registrations and revenue early.
- Use the date filters to evaluate the performance of individual events.
- Note that events in different currencies will show amounts separately.

Website & App

Create your own coach website in minutes with a custom design, your own URL, an integrated booking system, and Progressive Web App support — or go native with your own iOS and Android app on the Max plan.

Your Own Coach Website

You design the website and app under **We** > **Website & App**.

With spooorts.coach you create a professional coach website without any programming skills. The guided setup wizard walks you through the design step by step. Your website is hosted in German data centres and is immediately accessible via your personal URL.

- Custom URL in the format `myname.spooorts.de` or your own subdomain on the Pro plan
- Responsive design — optimised for desktop, tablet, and smartphone
- Upload your own logo, banner image, and color scheme
- Coach profile with description, qualifications, and photos
- Integrated booking page for athletes directly on your website
- News section for current announcements and updates
- Embeddable results and performance overviews
- SEO-optimised with meta tags, structured data, and sitemap
- SSL encryption (HTTPS) included for all pages
- GDPR-compliant cookie management and legal notice integration

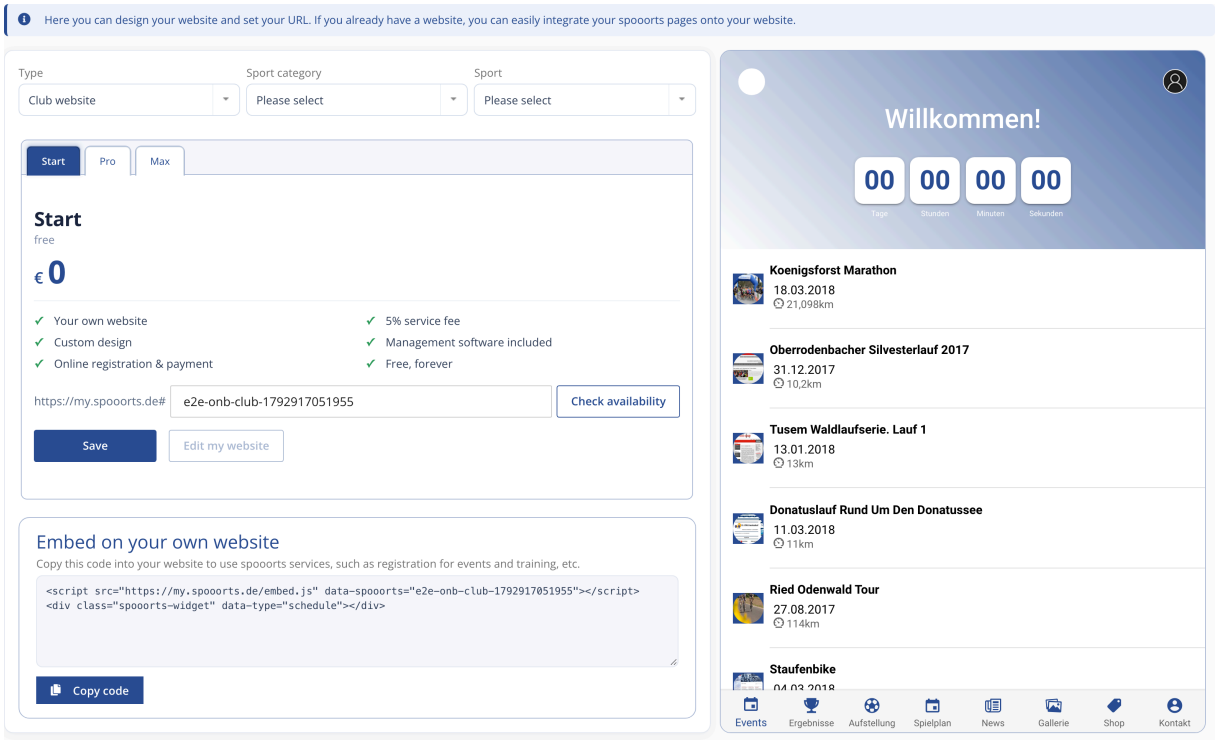


Figure 4: View in the administration area

Website Builder

The built-in website builder enables visual design of your website. All content is managed through a dashboard and changes are visible immediately.

- Drag-and-drop arrangement of page sections
- Pre-defined sections: header banner, about me, training offers, pricing, contact, gallery, testimonials
- Photo gallery with automatic image optimisation
- Embeddable maps for your training location (Google Maps)
- Social media links (Facebook, Instagram, YouTube, TikTok)
- Contact form with email forwarding
- Multi-language content possible (German, English, and more)

Progressive Web App (PWA)

Your coach website automatically works as a Progressive Web App. Athletes can save it to their smartphone home screen and use it like a native app — with full-screen mode, fast loading times, and basic offline capabilities.

- Home screen installation via "Add to Home Screen"
- App-like navigation without the browser toolbar
- Push notifications for booking confirmations and schedule changes
- Offline caching for faster loading of frequently visited pages
- Automatic updates — athletes always get the latest version

Native iOS & Android App (Max)

On the Max plan you get your own app in the Apple and Google app stores under your name and with your branding. The app is developed and maintained by spooorts — all iOS and Android updates are included in the subscription.

- Own listing in the Apple App Store and Google Play Store
- Custom app icon, splash screen, and app name
- Native push notifications for maximum reach
- Built-in GPS tracker for outdoor training (running, cycling, hiking)
- Offline access to training plans and exercise descriptions
- Biometric login (Face ID, Touch ID, fingerprint)
- Calendar sync with the athlete's smartphone calendar
- All iOS and Android updates included — no extra development costs

> **Important:** The native app requires the Max plan (monthly, price based on your size) and a one-time setup fee of €299. Store publication takes 4–6 weeks after design approval.

Custom Domain & Branding

On the Pro and Max plans you can connect your own subdomain or domain to your spooorts.coach website. The Start plan provides a free spooorts.de URL.

- Start: `myname.spooorts.de` (free)
- Pro: custom subdomain (e.g. `training.mydomain.com`)
- Max: fully custom domain possible
- On the Start plan, subtle spooorts logos are displayed; on Pro they are replaced by your own logos

News

The news feature lets you publish updates for athletes and training groups directly on your website and in the app.

Overview

You find this page in the menu under **Contacts** > **Marketing** > **News**.

The news feature in the coach management allows you to keep athletes and training groups informed about updates regarding your coaching service. Published news items appear on both your website and in the app, and can include a photo, a title and a detailed text.

Typical use cases include new training plans, class changes, competition dates or training tips.

Creating and Managing News

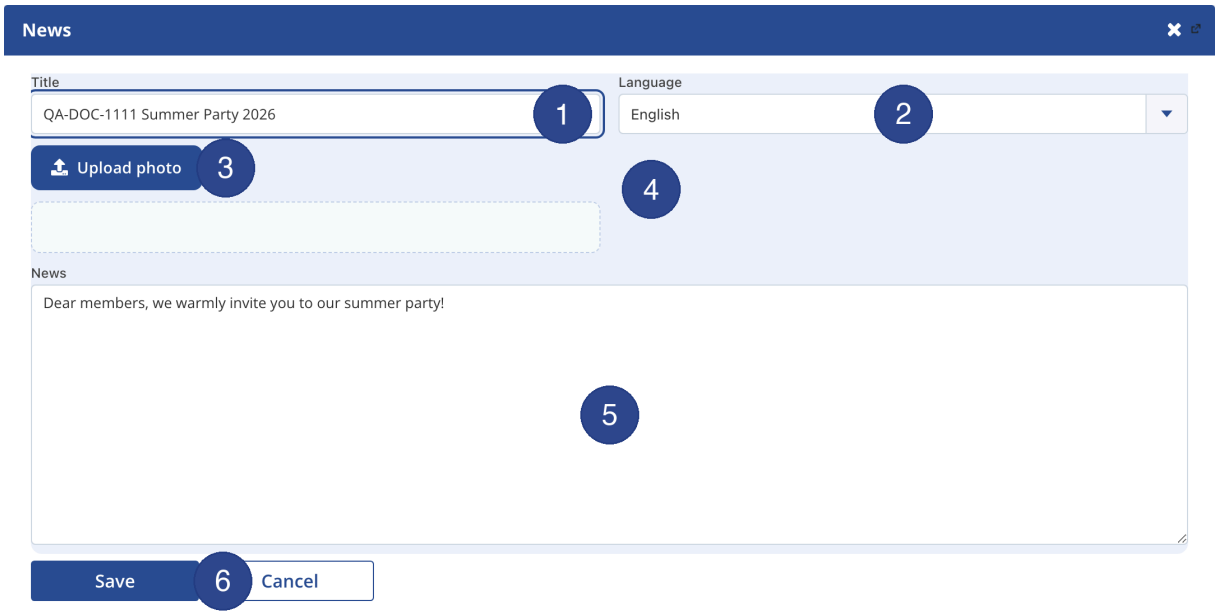


Figure 5: Creating and editing news in the spooorts Manager

① Title	Give the news a short, meaningful headline; it appears on the website and in the app.
② Language	Choose the language of the post; each language version is managed separately.
③ Upload photo	Adds an image (JPG, PNG); news with a photo gets more attention.
④ News image	Shows the uploaded photo as a preview; it appears next to the news text.
⑤ News text	Write the full text here; you can insert links.
⑥ Save	Publishes the news immediately on the website and in the app.

Tips for Great News

To make your news resonate with athletes and training groups, keep these tips in mind:

- Use descriptive titles that spark curiosity.
- Always include a photo – news with images receives significantly more attention.
- Keep the text concise and informative. Link to additional pages when needed.
- Publish news regularly to keep athletes and training groups up to date.
- Use the multilingual feature if you have an international audience.

Booking & Scheduling

Online booking system for training sessions — athletes book conveniently through your website or app, choose date, time, and session type, pay directly, and receive an automatic confirmation.

Online Booking for Athletes

You can find this page in the menu under **Training** > **Calendar**.

Your coach website includes an integrated booking page. Athletes see all available training sessions in a clear calendar view, select their preferred slot, enter their contact details, and pay directly online. The booking is confirmed instantly — no manual effort required on your part.

- Calendar view with all available slots (week and month view)
- Filtering by session type, location, and time of day
- Registered athletes see their booking history and can save favourites
- Waitlist for fully booked sessions with automatic notification
- Embeddable booking widget for external websites and social media profiles

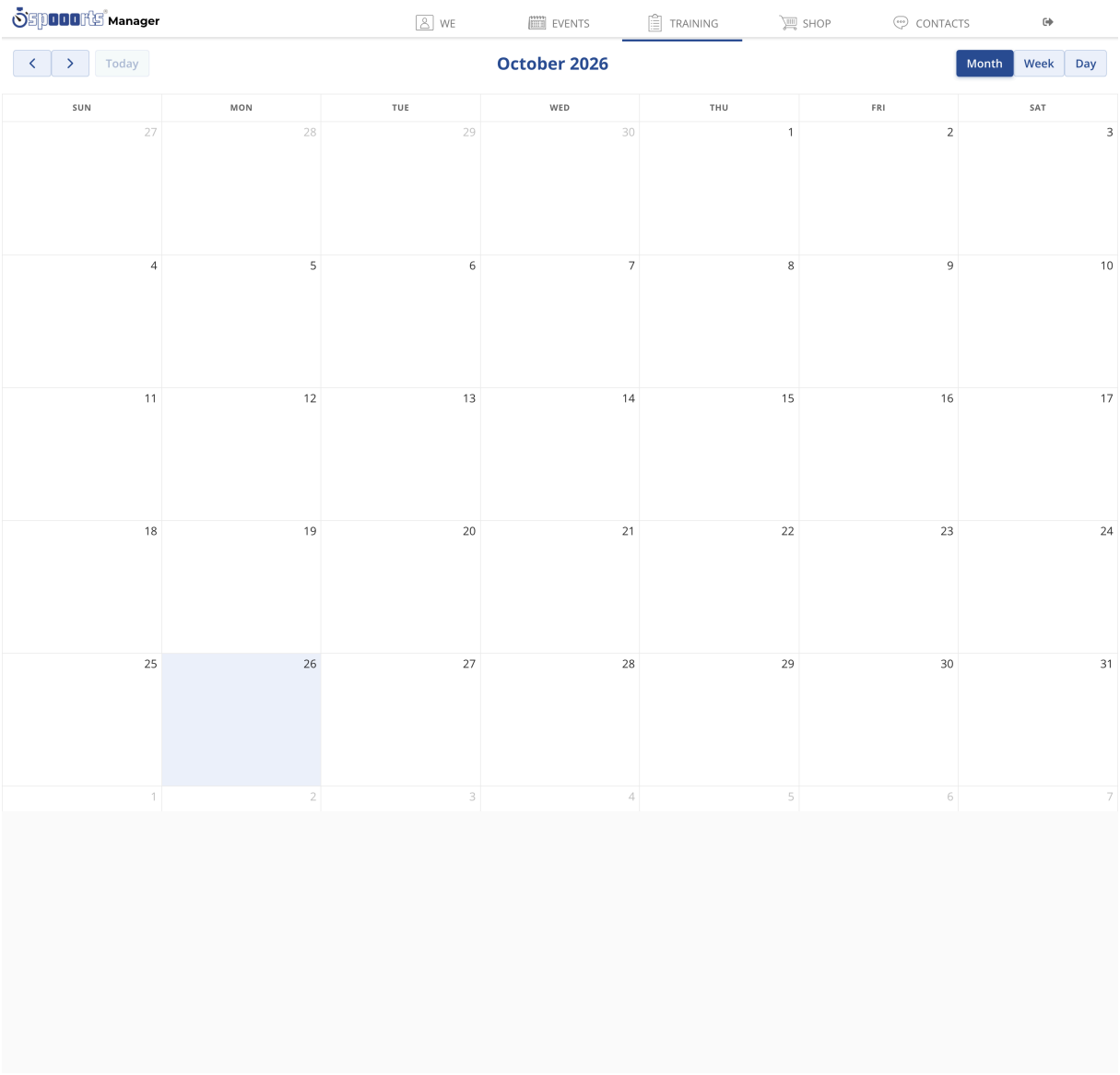


Figure 6: View in the administration area

Bookable Session Types

Define different session types with individual settings for duration, price, capacity, and description. Each type is displayed as its own tile or category on your booking page.

- **One-on-One Training** — personal session with one athlete; tailored to the individual's goals and fitness level
- **Small Group** — training with 2–6 participants; ideal for semi-personal training
- **Group Class** — open classes with larger capacity (e.g. bootcamp, yoga class)
- **Course Block** — a linked series of sessions (e.g. 10-session beginner course); athletes book the entire block at once
- **Trial Session** — free or discounted taster session for new athletes
- **Online Training** — virtual session via video link (Zoom, Teams, Google Meet); the link is automatically included in the booking confirmation

Availability & Calendar

Set your weekly availability. The calendar automatically accounts for buffer times between appointments and blocks out times when you are unavailable.

- Recurring availability per weekday
- One-off special availability and blocks (e.g. holidays, vacations)
- Configurable buffer time between consecutive appointments (e.g. 15 min)
- Maximum advance booking window (e.g. up to 30 days ahead)
- Minimum lead time (e.g. at least 24 hours before the session)
- Sync with external calendar (Google Calendar, Apple Calendar, Outlook) to avoid double bookings
- Automatic timezone adjustment for international athletes

Booking Confirmation & Reminders

After every booking the athlete receives an automatic confirmation by email and push notification. In addition, configurable reminders are sent before the session.

- Instant booking confirmation email with session details, location, and payment receipt
- Push notification in the spooorts app
- ICS calendar file (.ics) for adding to the personal calendar
- Reminders 24 hours and 1 hour before the session (configurable)
- QR code for check-in at the training venue included in the confirmation email

Cancellation & Rescheduling

Define your own cancellation policy. Athletes can cancel or reschedule bookings within the deadline themselves — automatically and without your manual intervention.

- Configurable free cancellation window (e.g. 24 hours before)
- Partial refund or no refund after the deadline
- Rescheduling to a different slot within the deadline
- Automatic notification on cancellation to coach and athlete
- Backfill of canceled spots from the waitlist
- No-show marking with optional fee

Recurring Bookings & Subscriptions

Athletes can book a recurring session — e.g. every Tuesday at 6:00 PM. The booking is automatically created and charged every week.

- Weekly, biweekly, or monthly recurrence
- Auto-renewal until canceled by the athlete
- Automatic payment on each recurrence
- Athletes can skip individual dates within the subscription
- Subscriber discount configurable (e.g. 10 % off the single-session price)

Calendar

Manage your training and event calendar with drag-and-drop scheduling and ICS import/export.

Overview

You find this page in the menu under **Training** > **Calendar**.

The calendar gives you a visual overview of all scheduled training sessions and events. You can create appointments directly in the calendar by clicking, move them by drag and drop, or resize them by dragging the edges.

Via filters you show and hide individual training groups, trainers or appointment types and can switch between day, week and month views. You create recurring appointments as a series, so a regular training only has to be entered once. Because the calendar builds on the same data set as registrations and participant lists, every appointment is directly linked to its participants.

Changes to an appointment automatically trigger the appropriate notifications to the affected participants, so that nobody misses a rescheduling or cancellation.

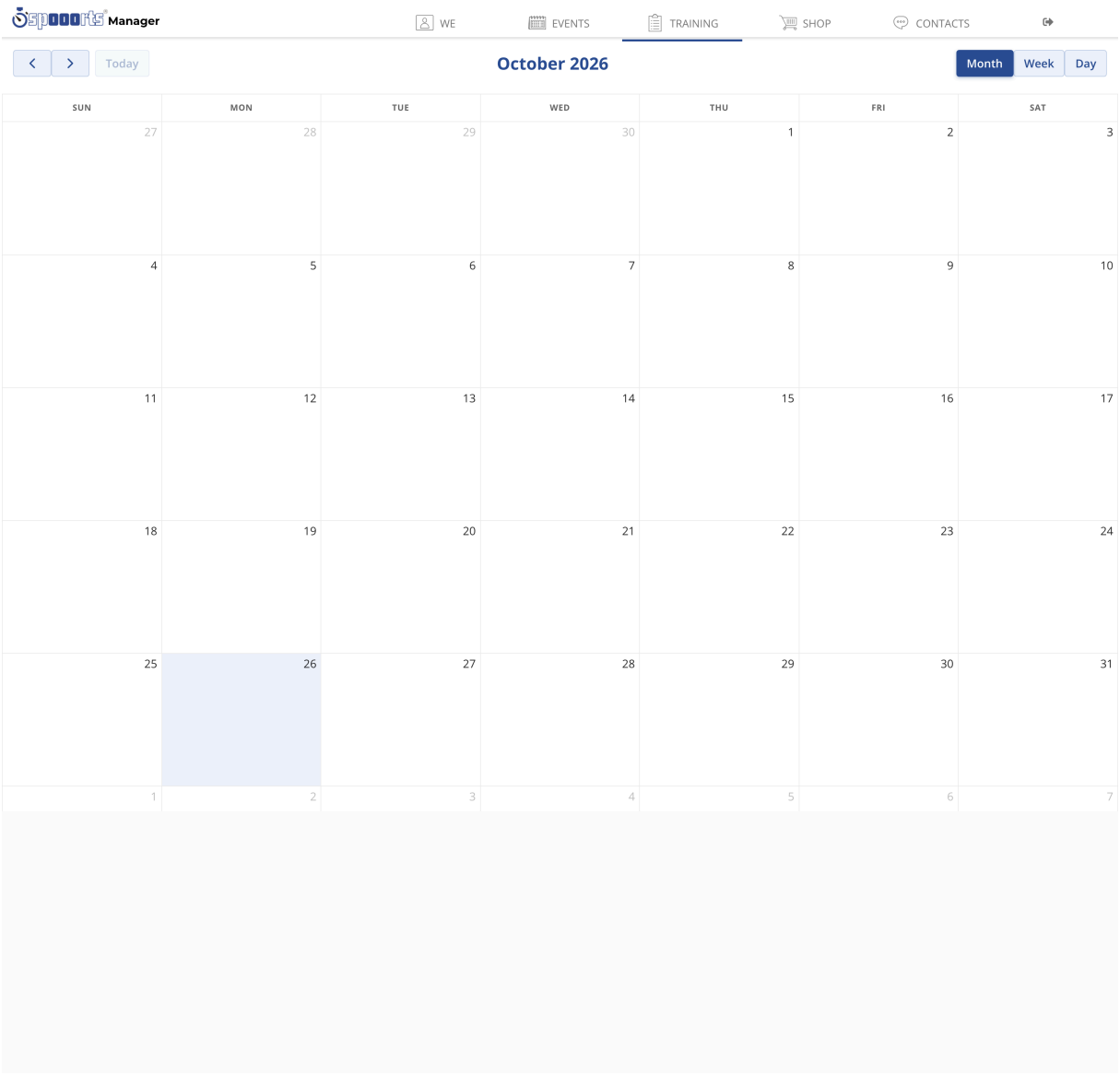


Figure 7: View in the administration area

Creating an Appointment

Click on a day or time range in the calendar to create a new appointment. In the dialog you enter the following information:

- **Title** – Name of the training session or event.
- **Start & End** – Date and time for the start and end.
- **Category** – Assign the appointment to a category (e.g. Training, Competition, Meeting).
- **Sport Category** – Select the sport if applicable.
- **Description** – Add details about the appointment.

ICS Import and Export

The calendar supports import and export in ICS format (iCalendar). This lets you import appointments from other calendar applications (Google Calendar, Apple Calendar, Outlook) or subscribe to your spooorts calendar from there.

- **Import** – Upload an ICS file to bring external appointments into your calendar.
- **Export** – Download the entire calendar as an ICS file.

Athlete Management

Centrally manage all athletes, their bookings, attendance records, progress, and contact details — GDPR-compliant, searchable, and exportable as CSV or Excel.

Athlete Database

You find this page in the menu under **Contacts** > **Our contacts**.

The athlete management module is the central CRM for your coaching business. Every athlete who signs up through your website or whom you add manually gets a complete profile with contact details, booking history, payment status, and personal notes.

- Automatic profile creation on online sign-up or manual entry
- Contact details: name, email, phone, address, date of birth
- Profile photo (uploadable by athlete or coach)
- Free-text notes per athlete (e.g. injuries, goals, special requirements)
- Tags and categories for grouping (e.g. "beginner", "competition", "rehab")
- Search and filter by name, tag, registration date, or status
- Bulk actions: send messages to multiple athletes at once

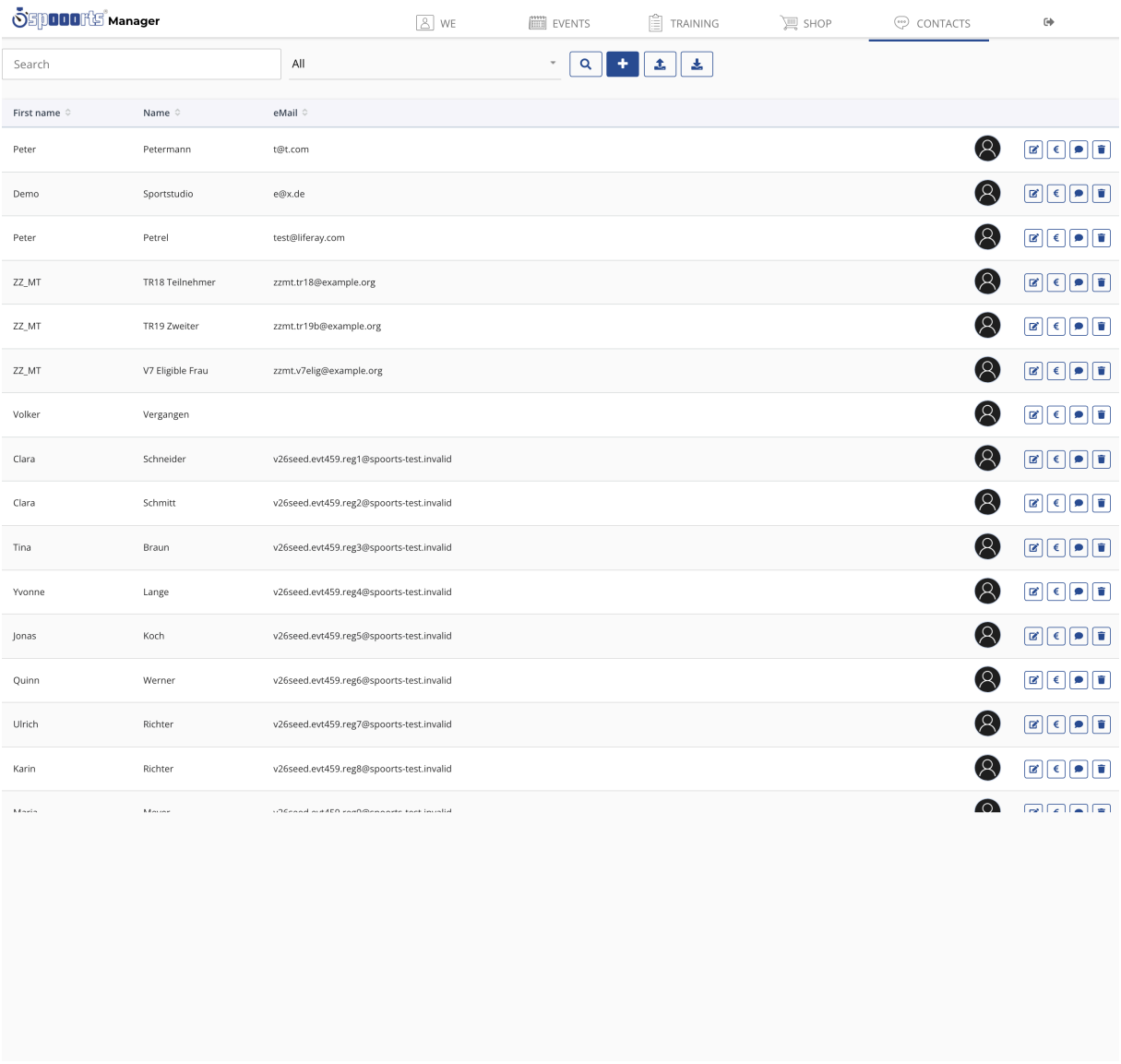


Figure 8: View in the administration area

Attendance Tracking

Track your athletes' attendance digitally — at the training venue via QR code scan or manually through the dashboard. The attendance history is viewable at any time and exportable.

- QR code check-in via the spooorts app — one scan per athlete
- QR scan via smartphone camera, no extra hardware
- Manual attendance marking via the coach dashboard
- Real-time counter: checked in / expected / missing
- Attendance history per athlete and per session
- Automatic no-show detection after session ends
- Export attendance lists as CSV or Excel

> **Tip:** Print the session QR code on a poster — athletes can check themselves in when they arrive at the training venue.

Progress Tracking

Document your athletes' training progress with individual performance data. Data can be entered by the coach or by the athlete themselves through the app.

- Freely definable performance parameters (e.g. weight, reps, time, distance)
- Trend charts for each parameter over a selectable period
- Comparison with previous periods and personal bests
- Milestones and goals (e.g. "10 km under 50 minutes")
- Athletes can view their own progress through the app
- Coach comments and feedback per training session

Groups & Training Groups

Organise your athletes into groups — e.g. by skill level, age group, or session type. Groups simplify communication, planning, and reporting.

- Unlimited number of groups
- Athletes can belong to multiple groups
- Group messages via push and email
- Group-specific sessions and booking links
- Group statistics: average attendance, active members, revenue

Privacy & GDPR

All athlete data is stored GDPR-compliantly in German data centres. You have full control over your athletes' data and can process access, deletion, and export requests at any time.

- Data processing in accordance with GDPR including Data Processing Agreement (DPA)
- Consent management: athletes agree to privacy terms at sign-up
- Right of access: full data export per athlete as JSON or CSV
- Right to erasure: athlete profile and associated data deletable with one click
- Automatic deletion of inactive profiles after a configurable period
- Audit log of all data changes for accountability

Import Contacts

Quickly and easily transfer existing contacts from other systems into the spooorts Manager – via file upload, drag & drop or using the CSV and vCard formats.

Why Import Contacts?

You find this page in the menu under **Contacts** > **Our contacts**.

If you already have contact data stored in another application – for example in a spreadsheet, in your email program or in another club management tool – you do not need to re-enter them one by one. The import function lets you transfer all contacts into the spooorts Manager at once. This saves time and avoids typing errors.

Step 1 – Open the Import Dialog

Navigate in the spooorts Manager to the **Contacts** section. In the toolbar above the contact list you will see several small buttons. Click the **Import icon** (an upward-pointing arrow – see **callout** ① in the image). The **"Import Data"** dialog opens.

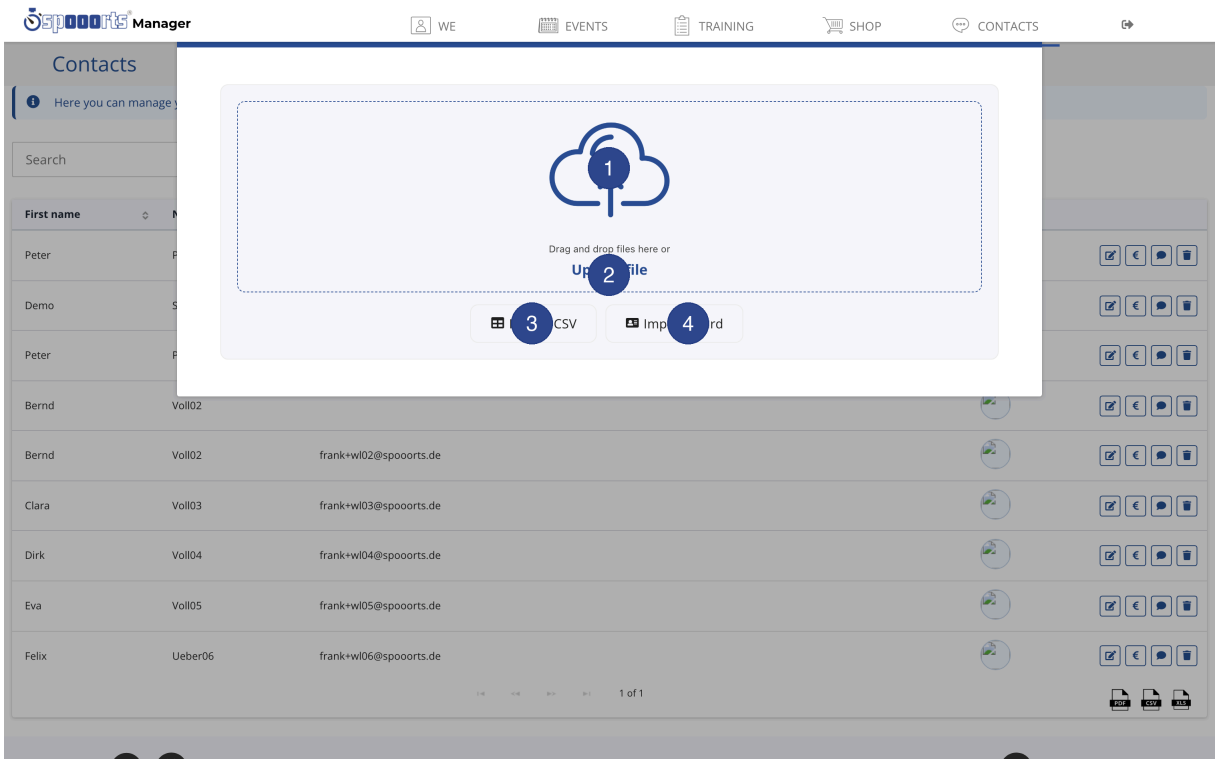


Figure 9: Import dialog in the Contacts section

Step 2 – Select a File

In the opened dialog there are two ways to provide your file:

Option A – Drag & Drop: The large dashed area in the center of the dialog is the **drag-and-drop zone**. Open the folder on your computer where the import file is located. Click the file, hold the mouse button and drag it directly into this dashed area. Then release the mouse button. The file is recognized automatically and the import begins.

Option B – Select a file via the file browser: If you prefer to search for the file using a standard selection window, click the blue link **"Upload file"** (see **callout ②**). The familiar file selection dialog of your operating system (Windows, macOS or Linux) opens. Navigate to the desired file, select it and confirm with **"Open"**.

> **Tip:** Both options lead to the same result. Drag & drop is slightly faster if you already have the folder open. The file browser is more convenient when you need to search for the file first.

Import via CSV File

Click the **"Import CSV"** button (see **callout ③**) to import a file in CSV format.

What is a CSV file? CSV stands for *Comma-Separated Values*. It is a simple text file in which the contact data is organised in a tabular layout – similar to a spreadsheet but without formatting. Each line corresponds to one contact, and the individual fields (e.g. first name, last name, email) are separated by a delimiter – usually a comma or semicolon.

When to use CSV? The CSV format is particularly well suited when your contacts are stored in a spreadsheet application such as Microsoft Excel, Google Sheets or LibreOffice Calc. Most programs offer an **"Export as CSV"** or **"Save as → CSV"** function.

How to create a CSV file from Excel:

1. Open your contact list in Excel (or another spreadsheet application).
2. Make sure the **first row** contains the column headings, e.g. `First Name`, `Last Name`, `Email`.
3. Click **File → Save As** and choose **CSV (Comma delimited)** as the file type.
4. Save the file and then use it for the import.

> **Important:** The exact order and naming of columns for the CSV import will be documented shortly. Make sure each column heading is spelled exactly as the system expects.

Import via vCard File

Click the **"Import vCard"** button (see **callout ④**) to import contacts in vCard format.

What is a vCard? A vCard (file extension `.vcf`) is an internationally standardised exchange format for electronic business cards. Virtually all contact and address book applications support this format – including Apple Contacts (iPhone, Mac), Google Contacts, Microsoft Outlook and Thunderbird.

When to use vCard? Use the vCard format when you want to transfer contacts from an email program or a smartphone address book. A single `.vcf` file can contain one or even several hundred contacts at once.

How to export contacts as vCard:

- **Apple Contacts (iPhone / Mac):** Open the Contacts app, select the desired contacts, click **File → Export → vCard** and save the `.vcf` file.
- **Google Contacts:** Open `contacts.google.com`, select the contacts, click **Export** and choose the **vCard** format.
- **Microsoft Outlook:** Go to **File → Open & Export → Import/Export → Export to a file** and choose **vCard file (.vcf)** as the target format.

> **Tip:** A vCard file automatically includes all important contact fields such as name, email address, phone number and postal address. Unlike CSV, you do not need to worry about the column order – the format handles the field mapping automatically.

Overview of Controls

Here is a summary of all elements in the import dialog:

1. ① **Import Button** – Opens the import dialog. Found in the toolbar in the Contacts section (upward-arrow icon).
2. ② **"Upload file"** – A clickable link that opens your operating system's file selection dialog.
3. ③ **Import CSV** – Starts the import process for a CSV file (tabular data).
4. ④ **Import vCard** – Starts the import process for a vCard file (electronic business cards).

Contact Categories

Create custom categories and group your contacts purposefully – for example by customer, supplier, athlete or coach. This way you always maintain a clear overview even with a large contact list.

What Are Contact Categories For?

You find this page in the menu under **Contacts** › **Our contacts**.

Contact categories help you organise your contacts in a meaningful way. Instead of managing all people and companies in one long, unsorted list, you can assign one or more categories to each contact – similar to labels on a filing folder. This makes searching and filtering much easier later on.

Examples of useful categories: **Customer**, **Supplier**, **Athlete**, **Coach**, **Company**, **Member** or **Sponsor**. You can add new categories, rename existing ones or delete those no longer needed at any time.

The Overview – All Categories at a Glance

Navigate in the spooorts Manager to **Contacts** and select the sub-item **Contact Categories**. You will see a table with two columns: **Category** (the name) and **Description** (an optional explanatory text). Each row represents an existing category.

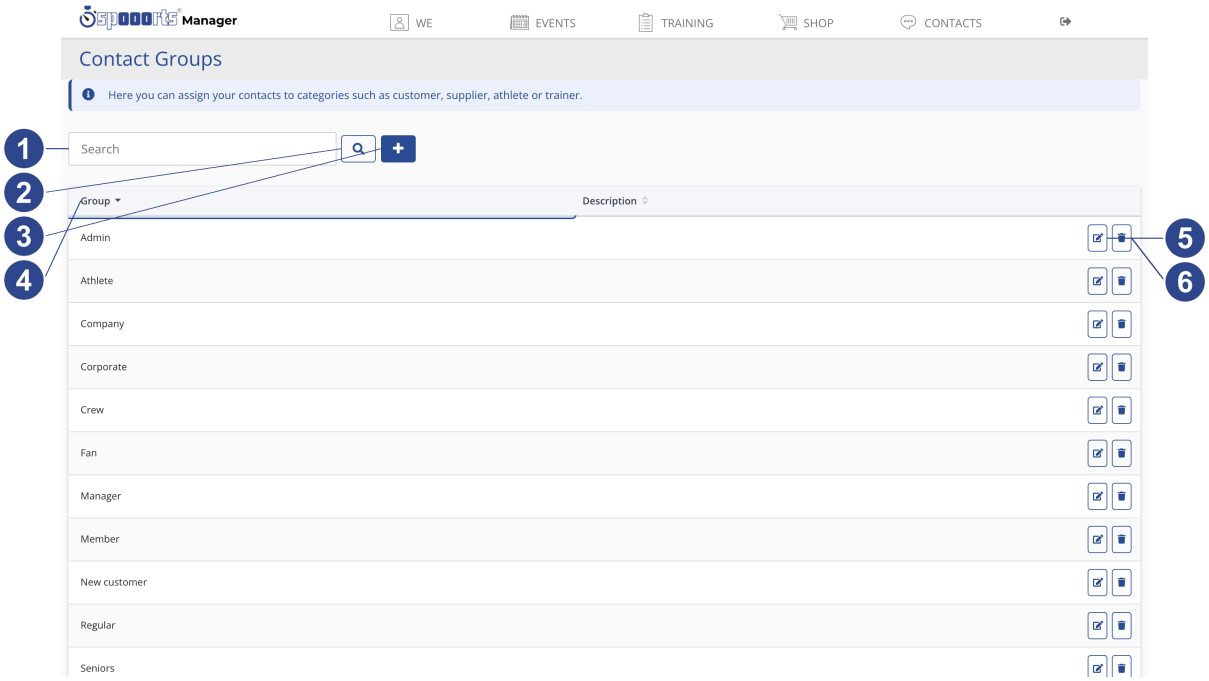


Figure 10: Overview of Contact Categories

All Controls in Detail

① **Search**	Filters the category list by the text you type.
② **Search**	Runs the search for the entered term.
③ **New**	Opens the form to create a new category.
④ **Group**	Sorts the list in ascending or descending order by this column.
⑤ **Edit**	Opens the category to change its name and description.
⑥ **Delete**	Permanently removes the category after a confirmation prompt.

Step by Step: Create a New Category

Here is how to create a new contact category:

1. Click the **plus icon** (callout ③) in the top right above the table.
2. A form opens. Enter a descriptive name in the **Category** field, e.g. *Sponsor* or *Club Member*.
3. Optional: Enter a short explanation in the **Description** field so that everyone on the team knows when this category should be used.
4. Click **Save**. The new category immediately appears in the list and is available for selection on all contacts.

> **Tip:** Create categories before you import or manually enter large numbers of contacts. This way you can assign categories directly when creating a contact and save yourself extra work later.

Assign a Category to a Contact

A category is not assigned directly in this overview but in the **detail view of the respective contact**. Open the desired contact, find the **Category** field and select one or more of the categories you have created. Confirm with **Save**.

> **Important:** A category only appears in the contact detail view for selection once it has been created here in the overview. Therefore, create all required categories first before editing contacts.

Training Groups

Organise participants into training groups, assign contacts and manage training plans.

Overview

You find this page in the menu under **Training** > **Groups**.

Training groups let you organise participants and contacts into groups. Each group can have its own training plan and an assigned coach. This helps you keep track of who is training in which group.

To a group you assign contacts, one or more trainers and a training plan. This cleanly separates, for example, performance levels, age groups or course formats, and each trainer sees exactly the participants of their group. You can send notifications and schedule changes specifically to a single group instead of contacting all contacts.

Participants can be in several groups at the same time, for example in a performance group and an age group. Via the group assignment you also control which content and appointments a participant sees in their app, so that everyone only receives the information relevant to them.

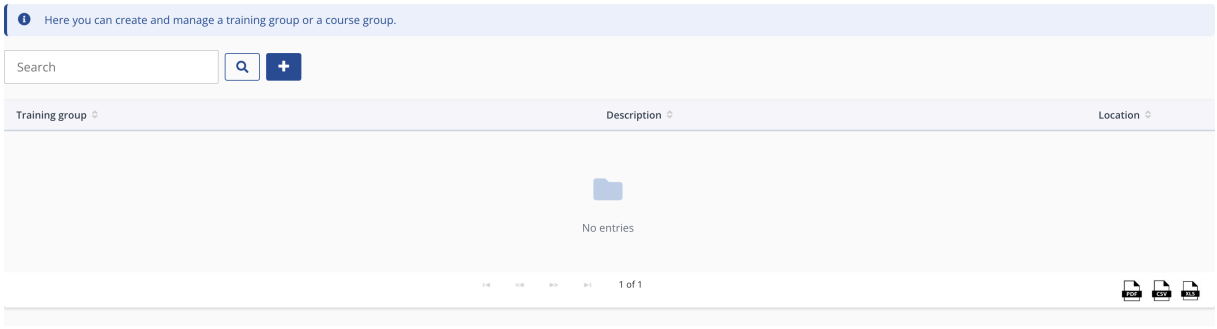


Figure 11: View in the administration area

Creating and Managing Groups

Navigate to the **Training Groups** section and click **+**:

- **Group Name** – Enter a name for the group (e.g. "Beginners Monday" or "Competition Team").
- **Description** – Add a description for the group.
- **Assign Participants** – Switch to the "Participants" tab and add contacts from your contact list. You can also create new contacts directly.

Training Plans

In the "Training Plans" tab you can assign a training plan to the group. Enter the plan name and the coach's name. Optionally you can add an image to the training plan.

Tips

- Use descriptive group names so participants immediately know which group is right for them.
- Do not use the group name "All" as it is reserved for internal purposes.
- Keep group sizes manageable for effective training supervision.

Courses

In the course catalog you create the courses of your organization — with name, description, capacity, duration, level and price. Room, trainer and group are assigned only when you create a calendar event.

Overview

You find this page in the menu under **Training** > **Courses**.

The **course catalog** describes the "what" of your offering: a course defines **name**, **description**, **capacity**, **duration**, **level** and **price**. The "when" and "who" — that is **room**, **trainer** and **group** — is assigned only when you create a specific event in the calendar. This way you describe a course once and schedule it as often as you like.

Viewing and managing courses



Figure 12: Course catalog in the spooorts Manager

① New course	Opens the form to create a new course. A course describes the "what" – name, capacity, duration, level and price; room, trainer and group are set later when scheduling in the calendar.
② Name	The course name. Click the column to sort the catalog alphabetically.
③ Level	The level of the course, e.g. beginner or advanced. This helps participants find the right course.
④ Price	The price to take part in the course; if empty, the course is free or covered by a pass.
⑤ Edit	Opens the course to change its name, description, capacity, duration, level and price.
⑥ Delete	Permanently removes the course from the catalog after a confirmation prompt. Remove any scheduled dates from the calendar first.

Courses and the calendar

A course in the catalog is initially a template. To actually run it, you create an event for the course in the **calendar** and assign **room**, **trainer** and **group**. This lets you offer the same course on different days, in different rooms and with different trainers.

Tips

- Describe each course the way your members should see it — name and description also appear during booking.
- Set the capacity to match the room so that booking is limited automatically.
- Use the level (e.g. beginner, advanced) so members can find the right course.
- Create a course only once and schedule it as often as you like via the calendar.

Trainer Management

In trainer management you maintain your roster of trainers and coaches with employment type, status and license link. The roster can be derived from existing sources.

Overview

You find this page in the menu under **Training** > **Trainers**.

In **trainer management** you keep all trainers and coaches of your organization. For each person you store the **employment type**, the **status** and the **license link**. You can derive the roster automatically from existing sources — such as section coaches or event instructors. On this basis you plan availability, compensation and substitutions.

Viewing and managing trainers



Figure 13: Trainer management in the spooorts Manager

① **Note**	The note explains that here you manage trainers and coaches (roster, employment type, status, license link) and can derive the roster from existing sources.
② **Import from sources**	Use this button to import trainers automatically from existing sources (section coaches, event instructors). The operation is **idempotent** — running it multiple times creates no duplicates.
③ **Add trainer**	Use the plus button to create a **new trainer** manually.
④ **Sortable columns**	The table shows **First name Last name**, **eMail**, **Employment type** and **Status**.

More trainer functions

Around trainer management, further areas are available:

- **Availability** — record when a trainer is available for events.
- **Qualifications** — document training and further education.
- **Licenses** — manage trainer licenses and their validity.

- **Compensation** and **trainer rates** — define honoraria and hourly rates (see also Expenses & Compensation).
- **Substitutions** — plan cover when a trainer is unavailable.

Connecting external calendars

Availability knows weekly times, absences, preferences and external busy times. You link external calendars (iCal, Apple, Google, Outlook) via the calendar settings: spooorts subscribes to the public calendars (.ics) read-only and enters them as busy times, so the trainer schedule produces no double bookings. You switch each feed on or off individually.

Tips

- Use "Import from sources" to keep the roster up to date without duplicate maintenance.
- Link licenses so you detect expired qualifications in time.
- Maintain availability so that scheduling and substitution planning run smoothly.

Passes & Punch Cards

Via Passes you define the different pass types — drop-in, visit pack, unlimited, trial and family. These are sold in the shop as a product of type "Pass".

Overview

You find this page in the menu under **We** > **Settings** > **Passes**.

With **passes** you offer flexible access models to your courses and training. A pass defines how many visits (credits) are included, how long it is valid and whether it is a subscription. Typical pass types are **drop-in**, **visit pack** (e.g. a 10-visit pack), **unlimited**, **trial** and **family**. Passes are sold in the shop as a product of type "Pass".

Viewing and managing passes

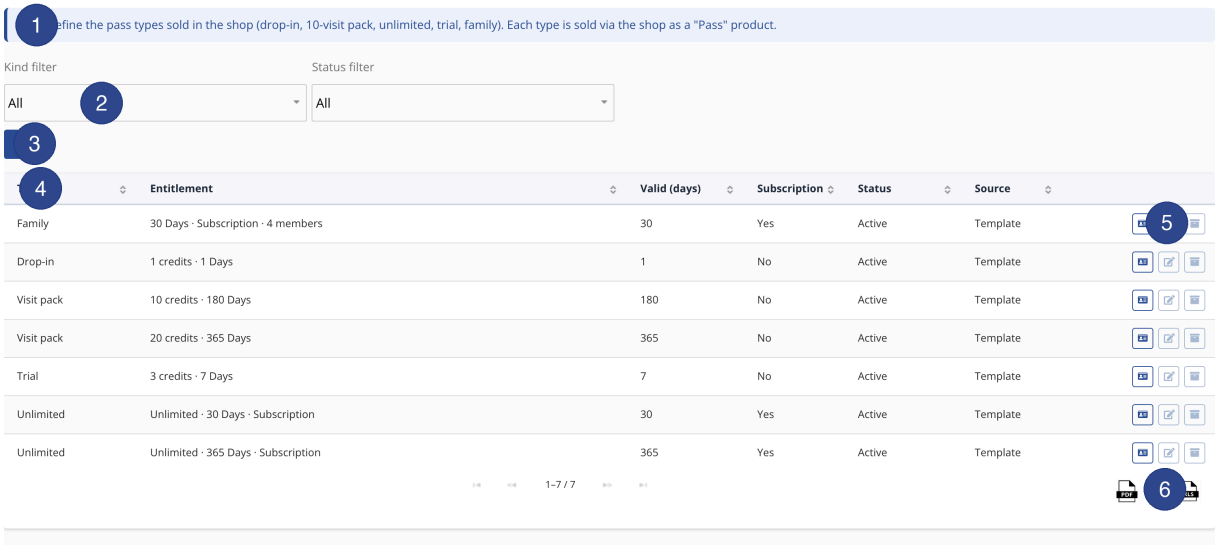


Figure 14: Pass types in the spooorts Manager

① **Pass type filter**	Shows only passes of a certain type, e.g. only subscriptions or multi-cards. A second field next to it filters by status (active or archived).
② **Add new pass type**	Opens the form for a new pass type, e.g. drop-in, 10-visit card, unlimited, trial or family. It is then sold in the shop as a product.
③ **Origin**	Shows whether the pass type comes from a template or was created by you. Templates cannot be edited or archived, your own types can.
④ **Issue pass**	Issues a pass of this type directly to a member, without going through the shop.
⑤ **Edit**	Opens the pass type to change its benefit, validity, price and subscription setting.
⑥ **Archive**	Archives the pass type so it is no longer sold, while already issued passes stay valid.

Pass types

- **Drop-in** — a single visit (1 credit).
- **Visit pack** — a balance of several visits (e.g. 10 or 20 credits) with a validity period.
- **Unlimited** — unlimited visits within a period, usually as a subscription.
- **Trial** — a discounted taster offer with a few visits.
- **Family** — a pass for several members of a household.

Tips

- Offer a mix of drop-in, visit pack and subscription to cover different usage habits.
- Use a trial pass to encourage new participants to make their first visit.
- Set up subscription passes (unlimited) if you want to generate recurring revenue.
- Since passes are sold in the shop, also check the product and price settings in the shop.

Training Planning

Create and manage recurring sessions, one-off lessons, courses, training camps, and online sessions with flexible scheduling, capacity controls, and automatic publication on your booking page.

Creating Training Sessions

You find this page in the menu under **Training** > **Training plans**.

Create new training sessions through the dashboard or the spooorts app. The wizard guides you through all settings: type, date, time, duration, location, capacity, and price. Published sessions appear immediately on your booking page.

- Session name, description, and category (e.g. strength, endurance, technique)
- Start and end date/time with configurable duration (30 min to all-day)
- One-off session or recurring series (weekly, biweekly, monthly)
- Maximum participant count per session
- Minimum participant count — session auto-cancels if not reached
- Draft mode — prepare a session without publishing it
- Difficulty level (beginner, intermediate, advanced)
- Required equipment as a checklist

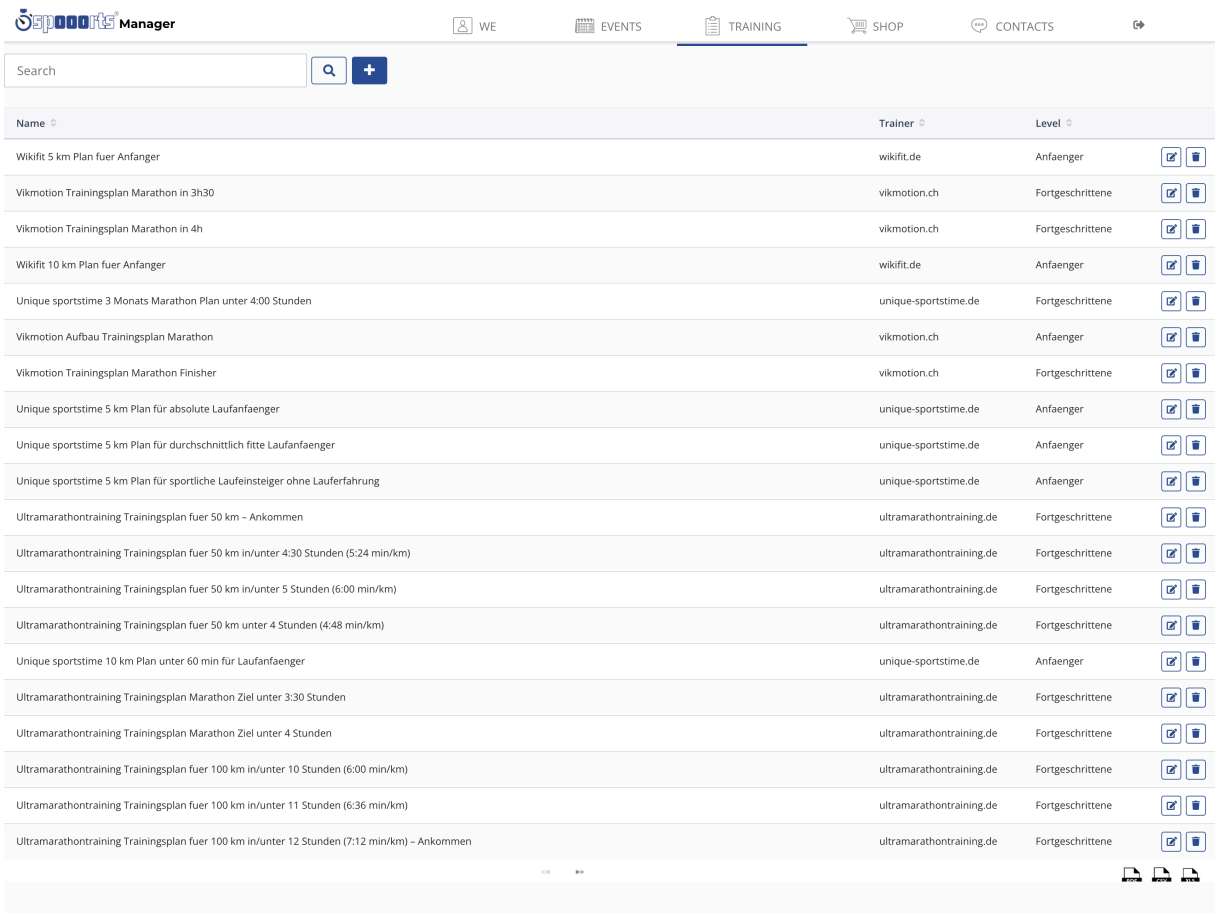


Figure 15: View in the administration area

Recurring Training Series

Define your training series once and spooorts.coach automatically creates all future sessions. Individual dates within the series can be adjusted or canceled independently without affecting the rest of the series.

- Weekly, biweekly, or monthly recurrence
- Series end by date, by count, or open-ended
- Automatic holiday and vacation exclusions
- Edit individual dates within the series (change time, location, capacity)
- Cancel individual dates with automatic notification to booked athletes
- Add additional dates to an existing series retroactively

Training Venues & Rooms

Manage multiple training venues with individual capacities and equipment details. Each venue can be assigned to a session; the booking page displays the venue with address and map view.

- Unlimited number of saved training venues
- Address, GPS coordinates, and embeddable map
- Room management within a venue (e.g. Hall A, Hall B, Outdoor Court)
- Per-room capacity
- Automatic conflict detection — no double-booking of the same room
- Directions and parking notes for athletes
- Indoor/outdoor flag with weather advisory for outdoor sessions

Individual Training Plans

Create personalized training plans for individual athletes or groups. Plans contain exercises, sets, reps, rest periods, and notes — athletes see the plan directly in the app.

- Exercise library with pre-defined and custom exercises
- Exercises with description, image, or video link
- Training plan as weekly or daily view
- Parameters per exercise: sets, reps, weight, duration, rest time
- Assign a plan to an athlete or a group
- Athletes can log completion and results in the app
- Coach sees compliance rate: how much of the plan was completed
- Duplicate a plan and adapt it for new athletes

Training Camps & Workshops

For multi-day events such as training camps, intensive workshops, or holiday camps spooorts.coach offers a dedicated planning mode with daily schedules, accommodation details, and lump-sum pricing.

- Multi-day events with a daily timetable per day
- Multiple sessions per day
- Optional accommodation and catering details
- Lump-sum fee with optional instalment payments
- Packing list and preparation notes for participants
- Automatic integration with spooorts.events for publicly advertised camps

Schedule Overview

The coach dashboard shows your complete weekly schedule at a glance — with all sessions, booking status, and daily revenue summary.

- Day, week, and month view
- Color coding by session type or occupancy

- Booking status per session (available, fully booked, waitlist)
- Quick access to participant list and check-in per session
- Drag-and-drop to reschedule sessions
- Daily revenue and projected weekly earnings

Communication

Communicate directly with your athletes — via push notifications, emails, in-app messages, and automated notifications for bookings, schedule changes, and news.

Messages & Chat

You find this page in the menu under **Contacts** > **Messages**.

The built-in messaging system enables direct communication between coach and athlete. Messages are delivered as both push notification and email so that no athlete misses an important update.

- Direct 1-on-1 messages to individual athletes
- Group messages to all athletes, a training group, or participants of a specific session
- Delivery as push notification and email simultaneously
- Read receipts — see whether the athlete has opened the message
- Attachments: images, PDFs, and links embeddable in messages
- Message templates for frequently used notifications
- Message archive — searchable by athlete, date, or keyword

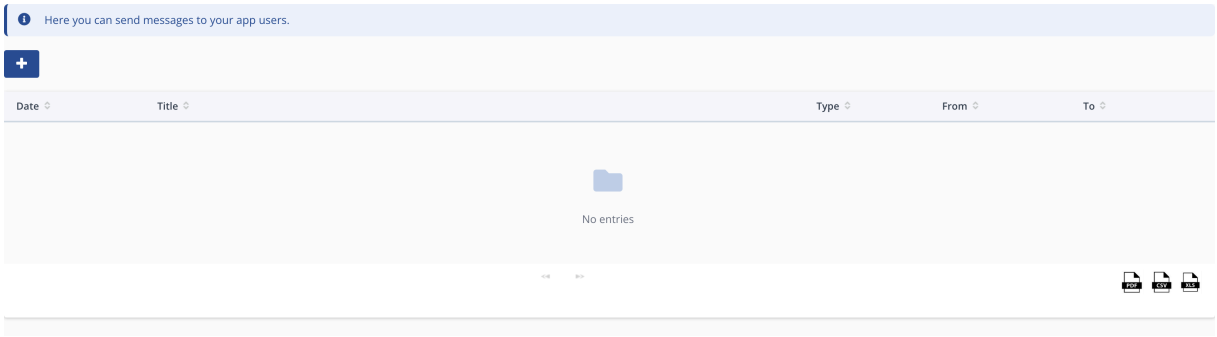


Figure 16: View in the administration area

Automated Notifications

spooorts.coach sends automatic messages to athletes at key moments. Every automated message can be customized, previewed, or disabled in the dashboard.

- **Booking confirmation** — instant confirmation with session details, payment receipt, and QR code for check-in
- **Training reminder** — configurable: 24 hours and/or 1 hour before the session with location, time, and coach info

- **Session change** — athlete is notified immediately when time, location, or cancellation changes
- **Cancellation confirmation** — with refund status information
- **Waitlist notification** — when a spot opens, the next athlete on the waitlist receives a booking invitation
- **Welcome message** — on first sign-up of a new athlete
- **Inactivity reminder** — optional message to athletes who have not booked a session for a configurable number of weeks
- **Birthday message** — optional automatic birthday greeting

News Feed & Announcements

Publish news, training tips, photos, and updates in the news feed of your coach website and app. The feed is visible to all visitors and serves as a central information hub for your athletes.

- Text posts, image posts, and video links
- Pinned posts stay at the top
- Scheduled publishing — write now, post later
- Post categorisation (e.g. training tip, announcement, result)
- Social media sharing: posts can be shared directly to WhatsApp, Facebook, and Instagram

Email Campaigns

Send targeted email campaigns to your athletes — e.g. to announce new courses, promotions, or training camp invitations.

- Email editor with templates and your own branding
- Recipient selection: all athletes, a group, or individual
- Delivery report: sent, delivered, opened, link clicks
- Unsubscribe link in every email (GDPR-compliant)
- Scheduled sending available

Reviews & Feedback

Athletes can leave a rating and short feedback after each session. The results help you improve your offering and can optionally be displayed on your website as testimonials.

- Star category (1–5) after the session via app or email
- Optional free-text feedback
- Average category per session type and overall
- Publish selected reviews as testimonials on your website
- Notification to the coach on new reviews

Newsletter

Create newsletter campaigns with a rich text editor and send them to all registered contacts.

Overview

You find this page in the menu under **Contacts** > **Marketing** > **Newsletter**.

The newsletter feature lets you reach all your registered contacts by email. Whether event announcements, season reviews or special offers – you write your newsletter with the built-in rich text editor and send it to all recipients with a single click.

Before sending you can send a test email to yourself and check the layout. spooorts manages unsubscribes automatically, so that unsubscribed recipients are not contacted again and your mailings remain legally compliant.

Sent newsletters remain stored in the history and can be duplicated as a template for the next mailing.

Creating and Sending a Newsletter

Navigate to the **Newsletter** section and click **+** to create a new newsletter:

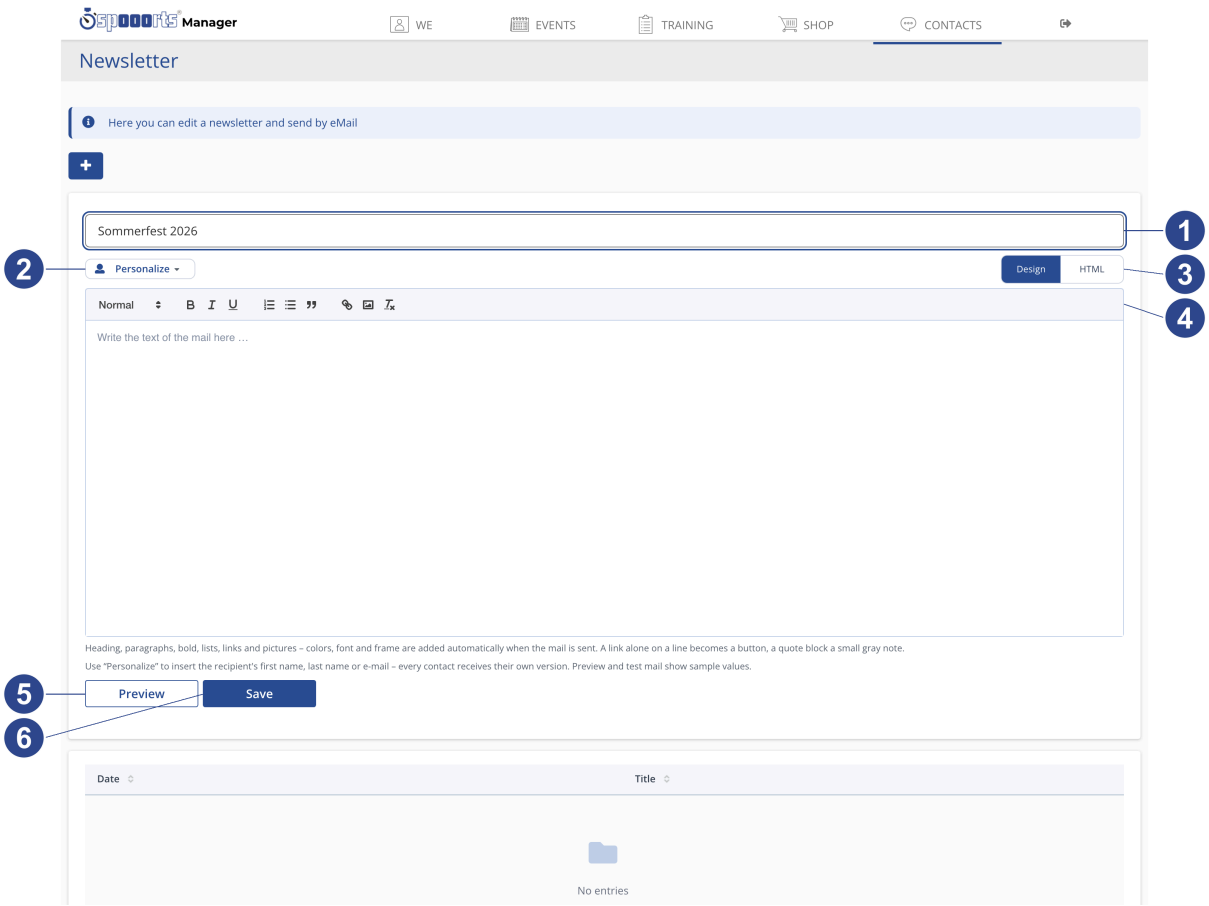


Figure 17: Creating a Newsletter

① **Subject**	Enter the subject line shown in recipients' inboxes.
② **Personalize**	Inserts placeholders such as first or last name so each contact gets their own version.
③ **Design / HTML**	Switches between the visual editor and direct HTML editing.
④ **Text editor**	Formats the content: headings, bold, lists, links and images.
⑤ **Preview**	Shows how the newsletter looks to recipients, using sample values.
⑥ **Save**	Saves the newsletter; it can then be sent via the envelope icon.

The newsletter list shows all created newsletters with date and title. Already sent newsletters can still be viewed and edited.

Tips

- Use a concise subject line – it determines whether the newsletter gets opened.
- Keep the text focused and use paragraphs for better readability.
- Don't send newsletters too frequently to avoid overwhelming recipients.

Voting & Surveys

With the voting engine you create lightweight surveys, event live polls and legally-binding club votes — with configurable scope and anonymity.

Overview

You find this page in the menu under **Contacts** › **Voting**.

The **voting engine** covers three use cases: **lightweight surveys** (e.g. quick opinion polls), **event live polls** (voting during an event) and **legally-binding club votes** (e.g. resolutions of a general meeting). For each vote you define the **scope** and the **anonymity**.

After a vote ends, the results are immediately available as an evaluation and, for legally binding decisions, can be documented in an audit-proof way so they hold up, for example, in the minutes of a general meeting.

Viewing and managing votes

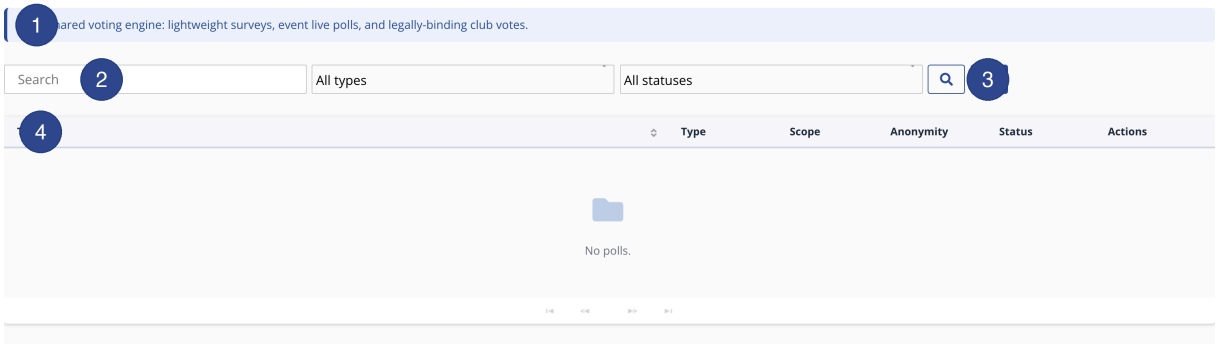


Figure 18: Voting & surveys in the spooorts Manager

① **Note**	The note describes the shared voting engine for surveys, event live polls and legally-binding club votes.
② **Search & filter**	Use the **search field** and the **All types** and **All statuses** filters to quickly find a specific vote. The magnifier starts the search.
③ **Create vote**	Use the plus button to create a **new vote or survey**, choosing type, scope and anonymity.
④ **Sortable columns**	The table shows **Title**, **Type**, **Scope**, **Anonymity**, **Status** and **Actions**.

General meeting & results

For formal resolutions you use the **general meeting**, in which several votes are bundled and minuted. You see the **results** of all votes in a dedicated report — for anonymous votes without any link to the individual person.

Tips

- For formal club resolutions, choose the "legally-binding vote" type and set the scope accordingly.
- Use anonymous votes when a secret ballot is required.
- Use event live polls to involve participants during an event.
- Bundle a meeting's resolutions via the general meeting.

Notifications

Send targeted email and push notifications to individual contacts or selected groups.

Overview

You find this page in the menu under **Contacts** > **Messages**.

Unlike the newsletter which goes to all contacts, notifications allow you to send targeted messages to individual people or selected contact groups. You can send both email notifications and native push notifications to the spooorts app.

Notifications are therefore ideal for time-critical or audience-specific information — such as a short-notice training cancellation for a particular group, a payment reminder to members in arrears or an individual appointment note. Because you select the recipients specifically, the message reaches exactly those affected without burdening all contacts. Push notifications appear directly on the lock screen of the spooorts app and are therefore usually noticed much faster than an email.

You can track the delivery status of each notification, so it remains traceable who received a piece of information.

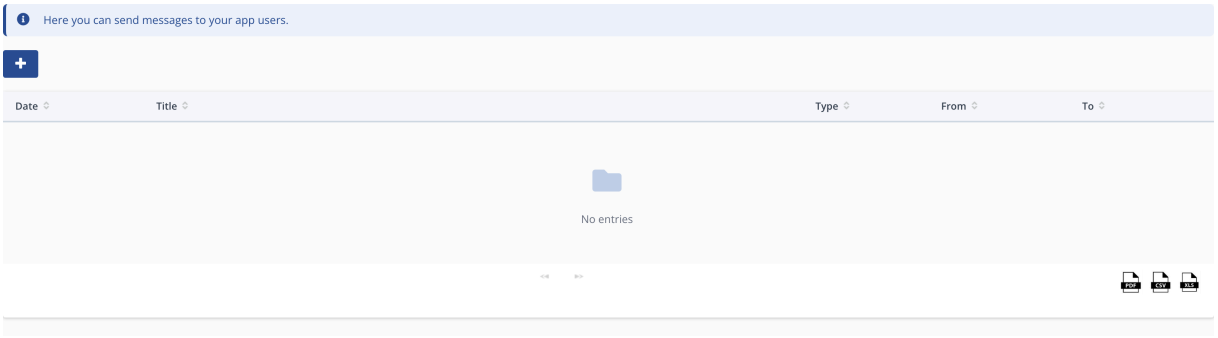


Figure 19: View in the administration area

Creating and Sending Notifications

Navigate to the **Notifications** section and click **+**:

- **Subject** – Enter the message subject.
- **Message** – Write the message text.
- **Select Recipients** – Switch to the "Contacts" tab and select the desired recipients using the checkboxes.
- **Send by Email** – Click the "Send Email" button to send the message by email.
- **Send by Push** – Click "Send Native" to send a push notification to the app.

Delivery Channels

Notifications support two channels that can be used independently:

- **Email** – The message is sent as an email to the stored address of the selected contacts.
- **Push Notification** – The message appears as a native notification on the recipients' smartphone (via Firebase). Prerequisite: the recipient must have the spooorts app installed.

System Emails

System emails are the automatic emails spooorts sends for you — such as registration confirmations, consent requests or receipts. Text, subject and design can be adjusted per mail.

Overview

You find this page in the menu under **We** > **Settings** > **Templates**.

System emails are sent automatically by spooorts for you — for example registration confirmations, consent requests or receipts. For each mail you can adjust the **text**, **subject** and **design**. Using the **preview** and the **test mail** you see the result with sample data before the mail goes to real recipients.

Viewing and adjusting system emails

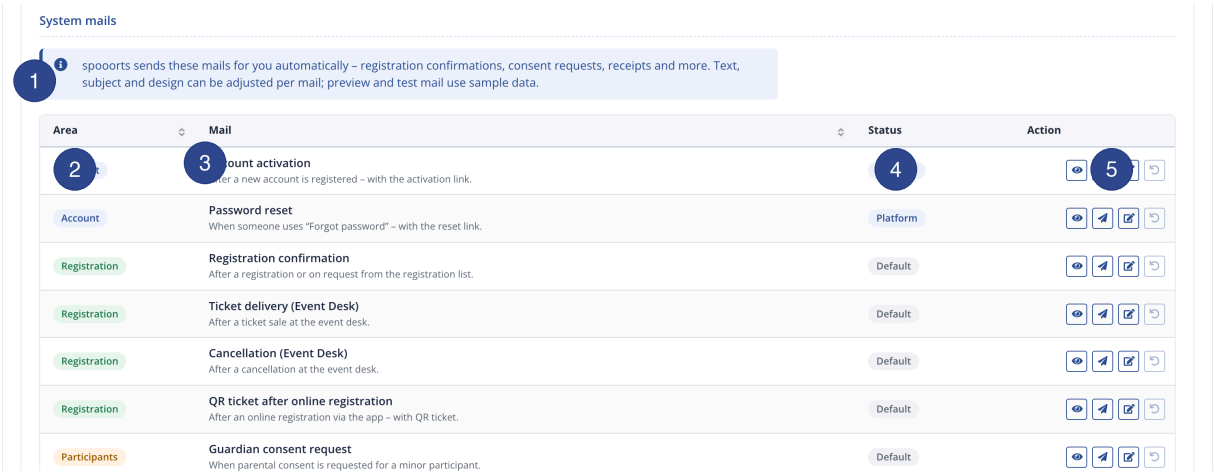


Figure 20: System emails in the spooorts Manager

① Note	The note explains that these mails are sent automatically and that text, subject and design can be adjusted per mail; preview and test mail use sample data.
② Area	The coloured category assigns each mail to an **area** — e.g. Account, Registration or Participants.
③ Mail	The name and short description explain **when** the mail is triggered (e.g. "After a registration" or "QR ticket after online registration").
④ Status	The status shows whether the mail runs on the **Default** or is centrally managed as a **Platform** mail.
⑤ Action	For each mail four actions are available: **preview** (eye), **send test mail** (paper plane), **edit** (pencil) and **reset** to the default template (arrow).

Tips

- At least adjust the tone and design to your organization — these mails are an important touchpoint with your members.
- Send yourself a **test mail** before activating, to check text and layout.
- With **reset** you can restore the default template at any time.
- Newsletters and email campaigns (marketing) are separate — system emails are purely transactional.

Mail Merge

With mail merge you create personalized letters or emails from a template for a recipient group. You select a template and group, mark the recipients and generate the mail merge.

Overview

You find this page in the menu under **Contacts** › **Marketing** › **Mail merge**.

Mail merge generates personalized letters or emails based on a **template** for a selected **recipient group**. Placeholders in the template (e.g. name, address) are filled in automatically per recipient. This lets you send, for example, invitations, dues notices or information letters to many contacts at once.

Finished mail merges can be generated and printed as a PDF or sent directly by email; this way you serve both recipients with a postal address and those with an email address from the same process.

Creating a mail merge

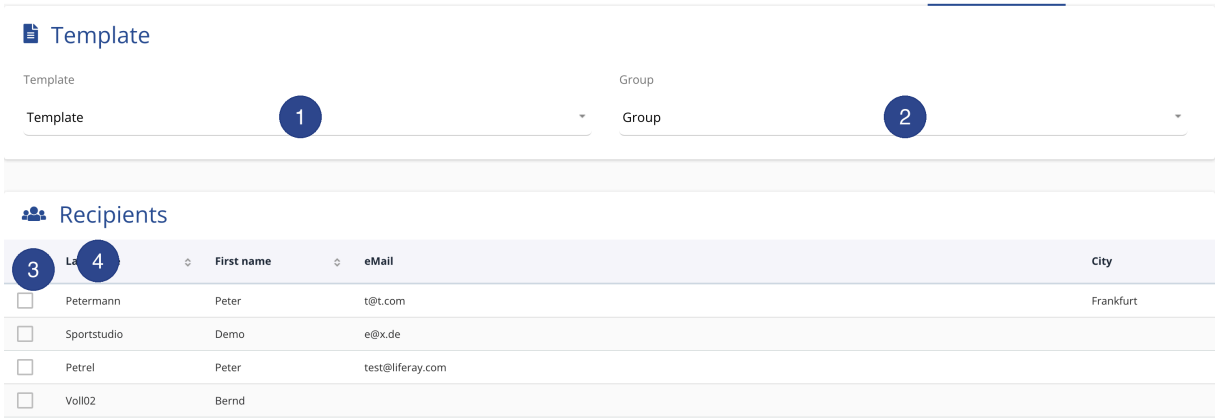


Figure 21: Mail merge in the spooorts Manager

① Template	Use the **Template** selector to choose the letter or email template that serves as the basis for the mail merge.
② Group	Use the **Group** selector to narrow the recipients to a contact group — the list below is filled accordingly.

③ **Select recipients**	Use the **checkboxes** to mark the specific recipients. The checkbox in the table header selects all at once.
④ **Recipient columns**	The list shows **Last name**, **First name**, **eMail** and **City** of each recipient. You can sort via the column headers.

After the selection you generate the mail merge — depending on the template as a print PDF or as a personalized email to all marked recipients.

Tips

- Maintain the templates centrally (see Templates) so that layout and placeholders are correct.
- Use contact groups to quickly narrow recurring recipient circles.
- Check a sample output before sending, to verify the placeholders.

Shop & Products

Manage your online shop with products, categories, images and prices – and offer participants merchandise, equipment or add-ons directly during registration.

Overview

The built-in shop lets you sell products directly through your event page and the app. Whether jerseys, medals, catering packages or add-on services – you create products with images, descriptions and prices and organise them into categories.

Products can be offered both in the standalone shop and directly during the registration process for an event (see Registration Products).

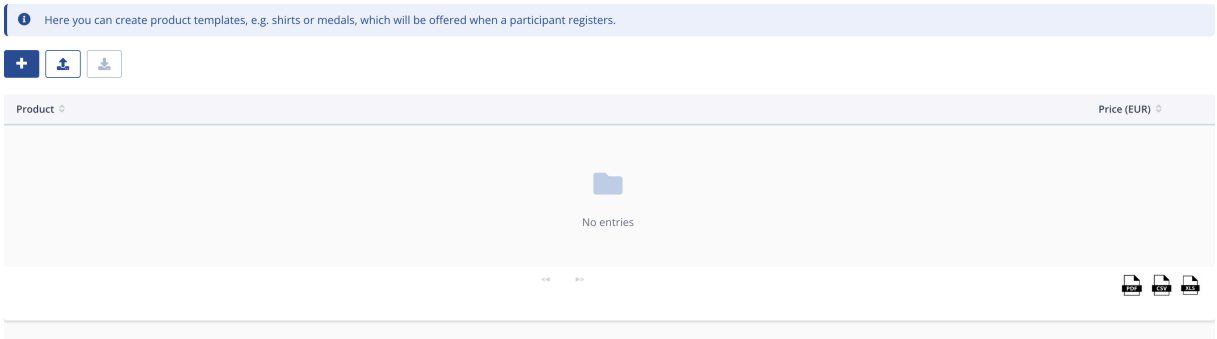


Figure 22: View in the administration area

Creating and Editing Products

Navigate to the **Shop** section in the sidebar. The product list shows all existing products with title, price, currency and language.

- **New Product** – Click **+** to create a product. Enter title, description, price and language.

- **Upload Image** – Upload a product image (JPG or PNG). The image is automatically scaled to the optimal size.
- **Assign Category** – Select a product category from the dropdown or create a new one.
- **Stock** – Optionally enter the available quantity so stock is managed automatically.

Product Categories

Product categories help you keep the shop well-organised. You can create up to five hierarchy levels to structure your products precisely – e.g. Apparel > Men > Running Shirts.

Categories are managed per language. A category can only be deleted when no products are assigned to it.

CSV Import and Export

For efficient management of large product ranges the shop supports import and export via CSV files. This lets you prepare products in a spreadsheet and upload them in one step.

- **Export** – Click the export icon to download all products as CSV.
- **Import** – Click the import icon and upload your CSV file. Duplicate entries are detected automatically.

Tips

- Use compelling product images – they significantly increase purchase intent.
- Use categories so buyers can quickly find what they are looking for.
- Enable stock management to avoid overselling.
- Offer popular products directly during registration to boost revenue.

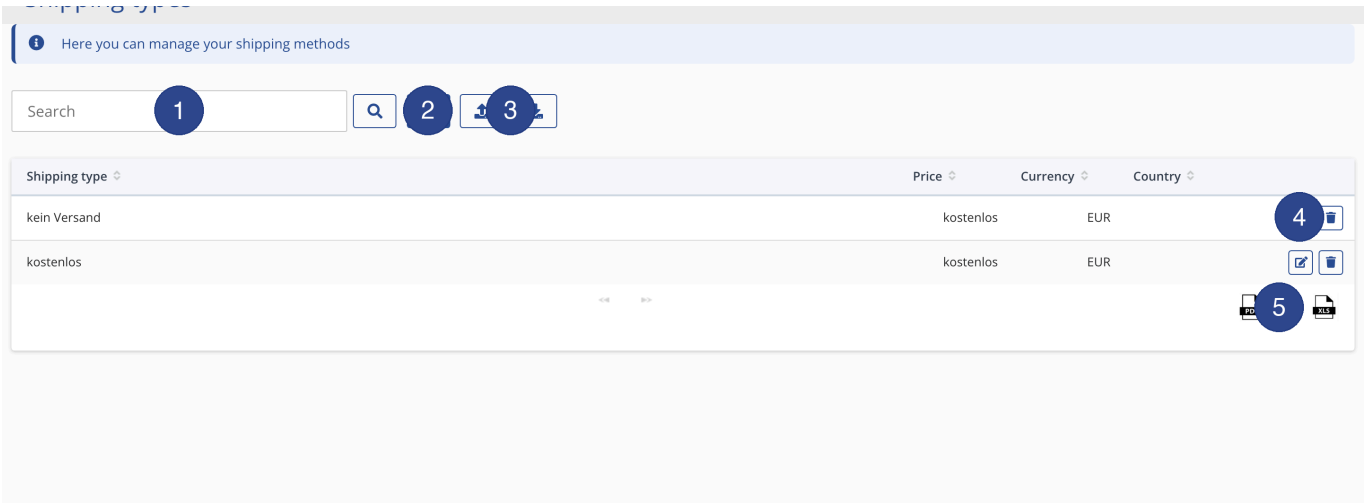
Shipping

Configure shipping methods with prices, delivery times and country-specific options for your shop.

Overview

You find this page in the menu under **Shop** > **Shipping**.

Shipping methods define how ordered products reach your customers. Each method has a name, a price, a currency and an optional destination country. At shop checkout the buyer picks the matching method and its price is added to the cart. The list can be searched, imported and exported as PDF, CSV or XLS.



1 – Search	Search shipping methods by name.
2 – New	Create a new shipping method via the plus.
3 – Import/Export	Import shipping methods from a file or back them up.
4 – Table	Per row, edit (pencil) or delete (bin) the shipping method.
5 – Export	Export the list as PDF, CSV or XLS.

Figure 23: Managing shipping methods

In the Shipping section you define which shipping options are available to your buyers. Each shipping method can be configured per country with its own prices, delivery times and logistics parameters.

You can offer several shipping methods in parallel — such as standard shipping, express shipping or pickup — and store different prices depending on the destination country, so that shipping costs are calculated correctly in the cart automatically.

Creating a Shipping Method

Click **+** to create a new shipping method. The dialog lets you configure details across several areas:

- **General** – Title, country (ISO code), price, currency, delivery days and description.
- **Carrier** – Carrier name, service level, zone, product ID and insurance option.
- **Dimensions & Weight** – Minimum/maximum weight plus package length, width and height.
- **Options** – Tracking, pickup option, cash on delivery, signature required and active status.

CSV Import and Export

Shipping methods can be imported and exported via CSV files. This is especially useful when you want to create many country-specific shipping options at once.

Point of Sale (POS)

With the point of sale you sell at the counter: search passes and products, add them to the cart and check out. The receipt is a QR receipt or an invoice.

Overview

You find this page in the menu under **Shop** > **POS**.

The **point of sale** (POS) is designed for **counter sales**. You search passes and products, add them to the cart, optionally assign a customer and check out. The receipt is issued as a **QR receipt** or an **invoice**.

Operating the point of sale

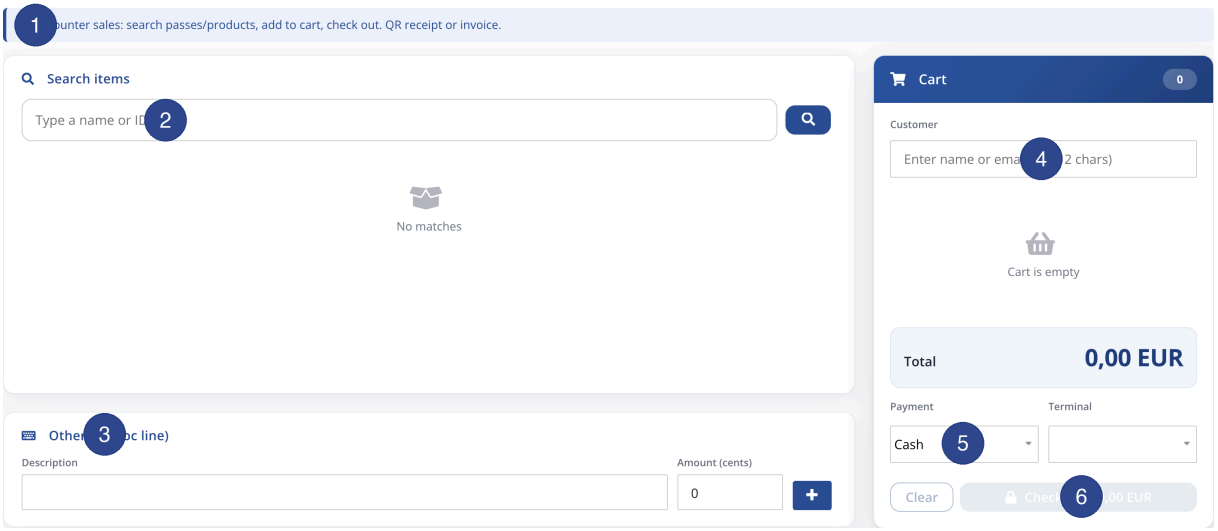


Figure 24: Point of sale (POS) in the spooorts Manager

① Note	The note describes the flow: search passes and products, add to cart, check out — with QR receipt or invoice.
② Search items	Enter a **name or ID** to find a pass or product and add the match to the cart.
③ Other (ad-hoc line)	For items not in the catalog, enter an **ad-hoc line** with description and amount and add it using the plus button.
④ Customer	Use the **Customer** field to optionally assign the sale to a person (name or email) — for example for an invoice in the customer's name.
⑤ Payment & terminal	Choose the **payment** method (e.g. cash) and, for card payment, the **terminal**. You configure the available payment methods and terminals in the POS settings.
⑥ Check out	The **total** is calculated continuously. Use **Check out** to complete the sale; use **Clear** to discard the cart.

POS settings

In the **POS settings** you define which **payment methods** (cash, card, …) are available and which **terminals** are connected. This way the point of sale is set up to match your counter.

Tips

- Assign a customer when an invoice should be issued in their name — otherwise the QR receipt is enough.
- Use ad-hoc lines sparingly; for recurring items a real product in the shop is worthwhile.
- Before first use, check the payment methods and terminals in the POS settings.

Discounts & Promotions

Create discounts as percentage or fixed amount and apply them to products, registrations or tickets.

Overview

The discount feature lets you set up price reductions for your products and events. Discounts can be defined as a fixed amount or a percentage and applied to different areas: all products, all registrations or individual tickets.

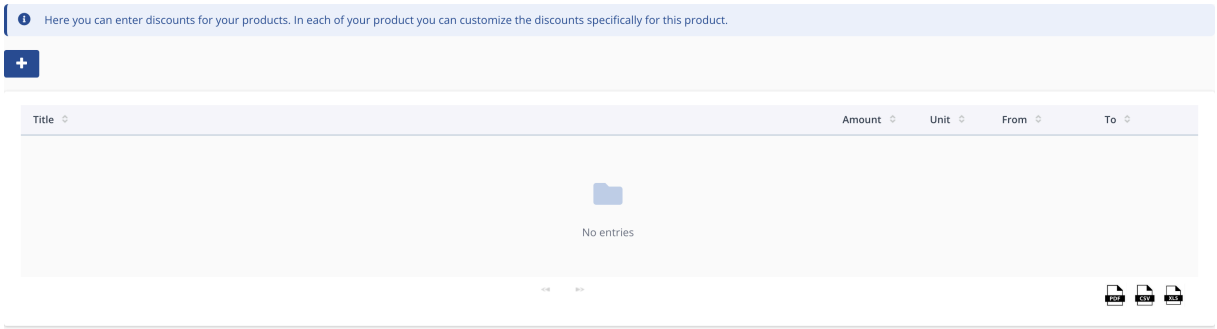


Figure 25: View in the administration area

Product Discounts

Product discounts are managed under **Shop > Discounts**. Each discount has a name, an amount (or percentage), a validity period and can optionally be applied to all products.

- **Name** – A descriptive name for the promotion (e.g. "Early Bird 10%").
- **Amount & Unit** – Fixed amount in the currency or percentage discount.
- **Validity Period** – Start and end date of the promotion.
- **All Products** – When enabled the discount applies automatically to the entire range.

Event Discounts (Early Bird)

Event discounts encourage participants to register early. The discount is defined as a number of days before the event – e.g. "30 days before: 15% discount".

- **Days Value** – Number of days before the event start until which the discount applies.

- **All Registrations** – When enabled the discount applies to all categories and routes.

Registration Discounts

Registration discounts can be configured individually per event, route and category. In addition to early-bird logic you can also set fixed validity periods. Global discounts are available as reusable templates that you create once and apply across events.

Price tiers by quota

Course places can be sold in tiers by count, e.g. “first 8 places 89 €, then 99 €” – combinable with date tiers. Tiers and counting live on the course series; exhausted tiers disappear from the price table. As soon as a price ladder exists, early-bird discounts no longer stack. See also Courses.

Vouchers

Create gift vouchers with a custom value, generate printable PDF certificates and send them to recipients by email.

Overview

You find this page in the menu under **We** > **Finance** > **Income & invoicing** > **Vouchers**.

The voucher feature lets you create gift vouchers with a freely chosen monetary value. Each voucher receives a unique code and can be downloaded as a PDF certificate or sent directly to the recipient by email.

When redeeming, the customer enters the code at checkout; the credit is offset against the invoice amount, and any remaining value is retained for later purchases. Each voucher has a status (open, partially redeemed, fully redeemed), so you keep track of outstanding obligations at all times.

Vouchers are suitable both as a gift for third parties and as credit that you issue, for example, in the event of a cancellation. Because each code is unique and carries its status, misuse through multiple redemption is ruled out, and the voucher value is always correctly reflected in your finances.

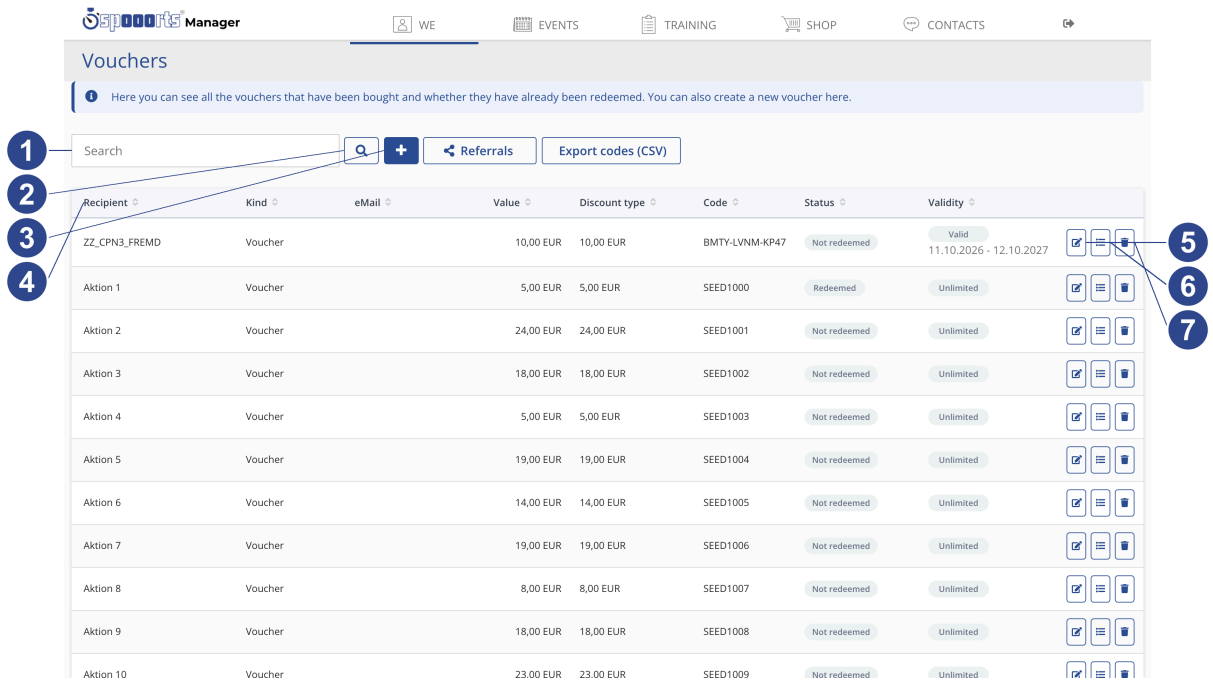


Figure 26: View in the administration area

① **Search**	Filters the voucher list by the text you type.
② **Search**	Runs the search for the entered term.
③ **Create new voucher**	Opens the form to create a new voucher.
④ **Sort columns**	Sorts the list in ascending or descending order by this column.
⑤ **Edit voucher**	Opens the voucher to change its value, code and validity.
⑥ **View voucher**	Shows the voucher as a PDF to view or print.
⑦ **Delete voucher**	Permanently removes the voucher after a confirmation prompt.

Creating a Voucher

Navigate to the **Vouchers** section and click **+** to create a new voucher:

- **Name** – Give the voucher a label (e.g. "Birthday Gift" or "Early Bird Reward").
- **Value & Currency** – Set the voucher value and currency.
- **Email** – Enter the recipient's email address to send the voucher to.

After saving, a unique voucher code is generated automatically and a printable PDF certificate is created.

Managing Vouchers

The voucher list shows all created vouchers with code, value and recipient email. Use the search function to filter by voucher code or email address to quickly check the status of individual vouchers.

Templates

Manage templates for bib numbers, awards, invoices, delivery notes and vouchers with your own branding.

Overview

You find this page in the menu under **We** > **Settings** > **Templates**.

In the Templates section you define the visual appearance of your documents. Templates are used as background images and are automatically filled with the respective data (participant name, placement, invoice amount etc.).

Typical templates are certificates, start numbers, invoices and participation confirmations. You upload a background design and define at which position which data appears; when generating a document, spooorts fills the placeholders automatically with the appropriate values. This way a template designed once produces any number of personalised documents without you having to edit each one individually.

Per document type you can store several templates and select the appropriate one depending on the occasion — such as a festive certificate for a tournament and a plain layout for a participation confirmation. The stored templates apply organisation-wide, so that all documents carry a consistent appearance.

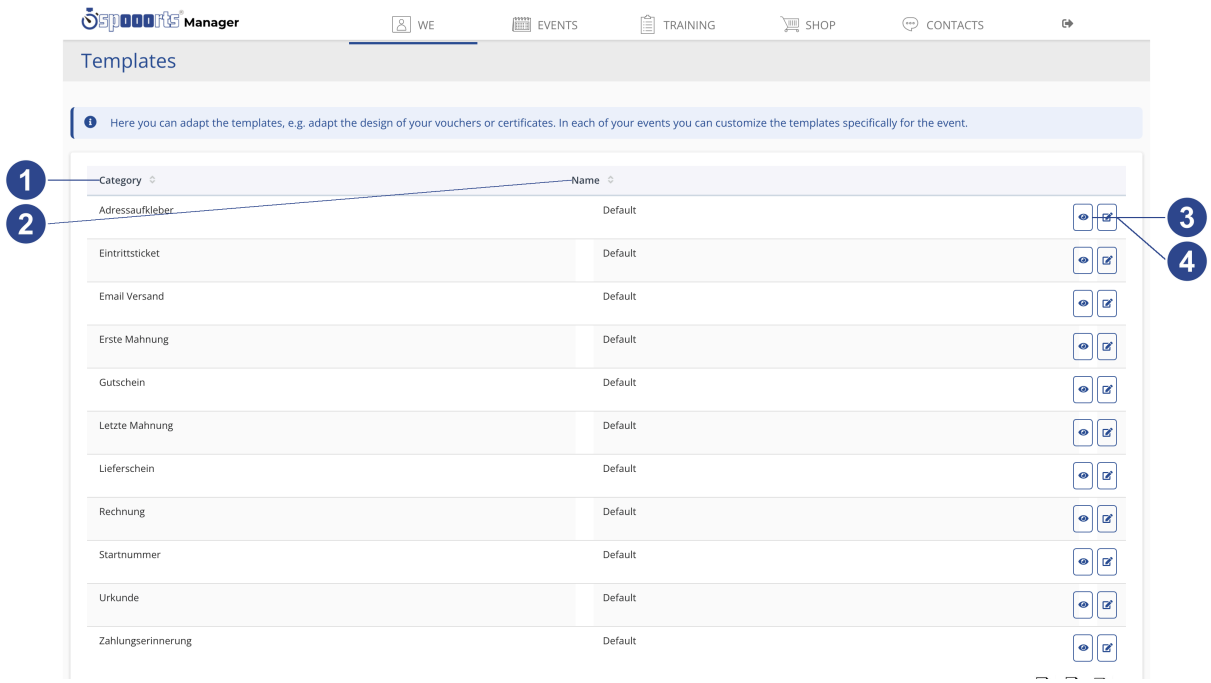


Figure 27: View in the administration area

① **Category**	Shows the kind of template, e.g. certificate, voucher, invoice or dunning notice. Click the column to sort the list alphabetically.

② **Name**	The name of the template version; "Default" is the standard version used everywhere until you create your own.
③ **Preview**	Opens a preview of the template so you can see how the finished document looks. This lets you check the design before using it.
④ **Edit template**	Opens the template editor where you adapt logo, colors, texts and layout to your design. The changes then apply to all documents of this category.

Template Types

Five template types are available:

- **Bib Number** – Template for printed bib numbers. Recommended resolution: 2160 × 1515 pixels.
- **Award** – Template for participant and winner certificates. Recommended resolution: 4088 × 6320 pixels.
- **Invoice** – Template for automatically generated invoices.
- **Delivery Note** – Template for shipping documents.
- **Voucher** – Template for the PDF certificate of gift vouchers.

Customizing Templates

Select a template type from the list and click Edit. In the dialog you see a selection of predefined templates as preview images. You can choose a default template or upload your own template as a PNG file.

Custom templates should adhere to the recommended resolution for optimal display. The system automatically generates a preview of your uploaded template.

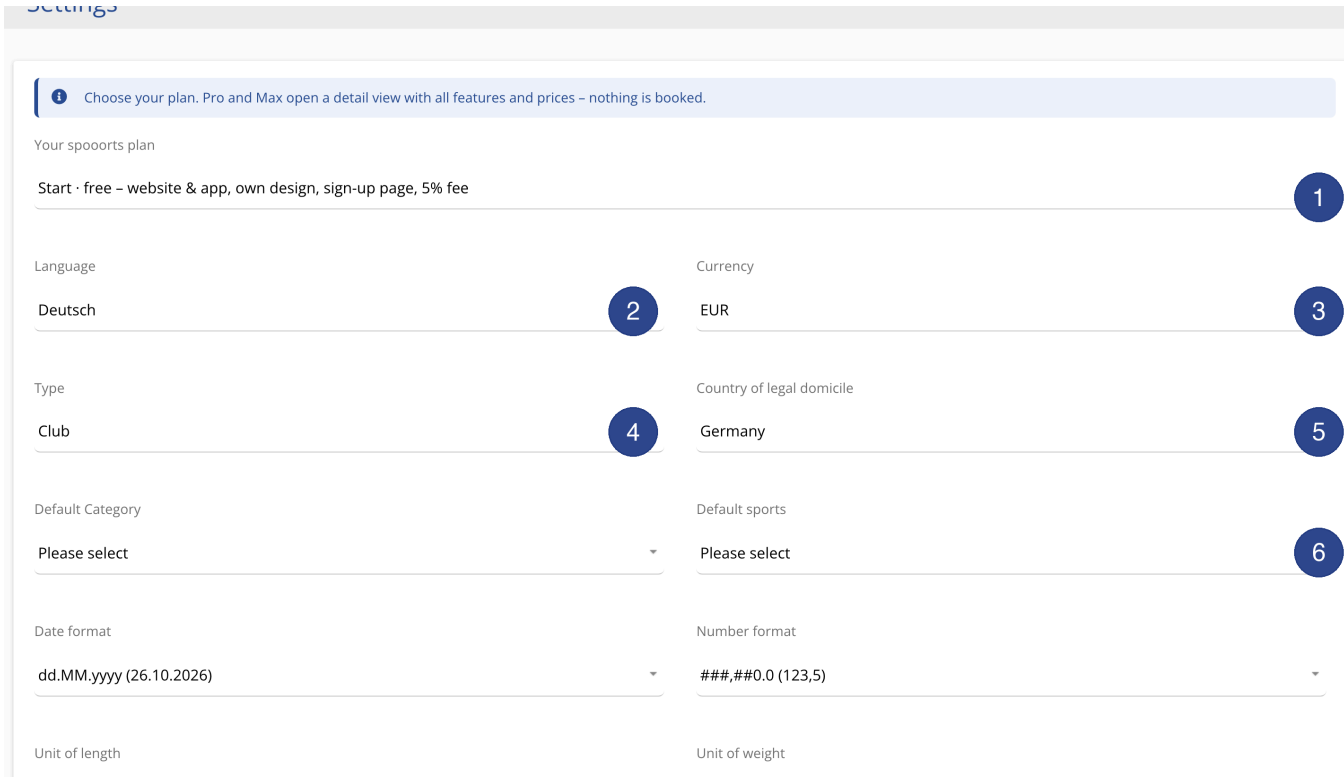
Settings

Configure global settings for language, currency, units of measurement, payment and social media links.

Overview

You find this page in the menu under **We** > **Settings**.

The global settings hold your organisation's core data – from the booked spooorts package through language, currency and legal form to the default values for category, sport and display formats. These defaults apply to new events, invoices and your website and can be changed at any time.



1 – Package	The booked spooorts package (Start, Pro or Max) with its scope and fee.
2 – Language	Default language of the interface and the automated e-mails.
3 – Currency	Currency for prices, invoices and payouts.
4 – Type	Legal form of your organisation (club, studio, organiser …).
5 – Country	Country of legal domicile – drives the tax and compliance features.
6 – Defaults	Default category and sport pre-selected for new events.

Figure 28: General settings

In the Settings section you define the basic parameters for your spooorts Manager. These settings apply globally to all your events and the shop.

General Settings

- **Language** – Select the default language for your event pages and the management interface.
- **Currency** – Set the default currency for prices, fees and invoices.
- **Sport Category** – Choose your main sport and optionally a sub-category.
- **Time Format** – Set whether times are displayed in 24-hour or 12-hour format.
- **Number Format** – Determine the format for decimal numbers (comma or dot as separator).
- **Length Unit** – Choose between kilometers and miles for distance values.
- **Weight Unit** – Choose the unit for weight values in the shipping section.

Social Media Links

Connect your social media profiles to your event page. The following platforms are supported:

- Instagram, Facebook, WhatsApp, YouTube
- Xing, LinkedIn, Twitter/X
- One freely configurable additional link

The links are displayed as icons on your public event page and in the app.

Logo & Sponsors

In the **Logo** section you upload your organization's logo. It appears on your website, in the app and on documents such as invoices and certificates. You can upload multiple logos and select the active one by clicking it.

In the **Sponsors** section you upload your sponsors' logos. These are prominently displayed on your event page. You can add as many sponsor logos as you like.

Website & App

Under **App** you configure your public website and app integration. You can open the website directly in the browser, launch the website designer or use integration options such as embedding on external pages.

Cancellation policies

Reusable rules for cancellation, transfer, distance switch and deferral – with deadlines, fees and staggered refunds. They apply to events, trainings, shop products and memberships.

What are cancellation policies?

You find this page in the menu under **We** > **Settings** > **Cancellation Policies**.

A cancellation policy bundles the rules for what participants may change about their booking and what it costs – cancel, transfer the place, switch distance or move the date.

You create the policy once and assign it to many offers: events, trainings (courses, slots, rentals), shop products and memberships. Two tabs separate the **Rules** (cancellation) and the **Memberships** (termination).

Creating a policy

Open the **cancellation policies** in the spooorts Manager, stay on the **Rules** tab and click **+** (new policy). The policy editor opens.



Figure 29: The editor for a cancellation policy

① – Name, template and deadlines

Give the policy a **Name** and choose a **Template** (e.g. Standard) as a starting point. **Changes until days before start** is the overall deadline, **Max. changes per booking** limits how many changes are allowed.

② – Action matrix

For each action (Cancel, Transfer place, Switch distance, Defer to next edition, Move date) you decide whether it is **Allowed** and whether participants may trigger it **themselves** (self-service).

③ – Approval, fee and condition

For each action you choose the **Approval** (Instant or Review) and the **Fee**. The **Condition** column on the right handles special cases (per tiers, fee paid by the

	new person, cheaper distance, credit and validity).
④ – Staggered rules	The refund by **days before event**: **Refund %** plus **Flat fee** and **Fee %** per tier. **Add tier** adds another (e.g. 30 days 100 %, 7 days 50 %, 0 days 0 %).
⑤ – Default for	Mark which offer kinds (Events, Courses, Slots/training sessions, Rentals, Passes/memberships) the policy applies to automatically. Below, **What participants see** shows the text from the participant's view.

The actions

Each row of the matrix stands for a change participants can make:

Cancel	Participants cancel; the refund amount follows the staggered rules below.
Transfer place	The place passes to another person. The transfer fee is paid by the new person.
Switch distance	Switch to another rating or distance. With a cheaper distance the difference is forfeited (or credited, depending on the setting).
Defer to next edition	The booking moves to the next edition – with a **credit in %** and a **validity in months**. Usually set to *Review*.
Move date (course, slot, rental)	Only for courses, slots and rentals: the booked date is moved.

Allowed enables the action at all, **Self-service** lets participants do it themselves, and **Approval** decides whether it takes effect instantly or you review it first.

Staggered refund

The staggered rules decide how much comes back on a cancellation – the closer to the event, the less:

Days before event	From how many days before the event the tier applies.
Refund %	How much of the price is refunded.
Flat fee / Fee %	A fixed or percentage cancellation fee that is kept.

Add tier adds more tiers, the trash icon removes one. Example: 30 days 100 %, 7 days 50 %, after that 0 %.

Defaults and memberships

Via **Default for** the policy applies automatically to all offers of the marked kind that have no policy of their own. **What participants see** sums up the rules automatically from the participant's view, and **Used in** counts the offers that use it.

The second tab **Memberships** manages separate termination policies for memberships (notice period, minimum term, automatic renewal and more).

> **Tip:** Create a default policy per offer kind. New events, courses or memberships then adopt it automatically – you never have to assign it one by one.

Locations

Under Locations you manage your venues such as stadiums, sports halls, training grounds and course and fitness rooms. Additional tabs cover maps and access control.

Overview

You find this page in the menu under **We** > **Locations**.

Under **Locations** you maintain all the places where your operation takes place — **stadiums**, **sports halls**, **training grounds**, **course and fitness rooms** or other event locations. These locations are used in many places, such as course events, events and ticket plans.

Viewing and managing locations

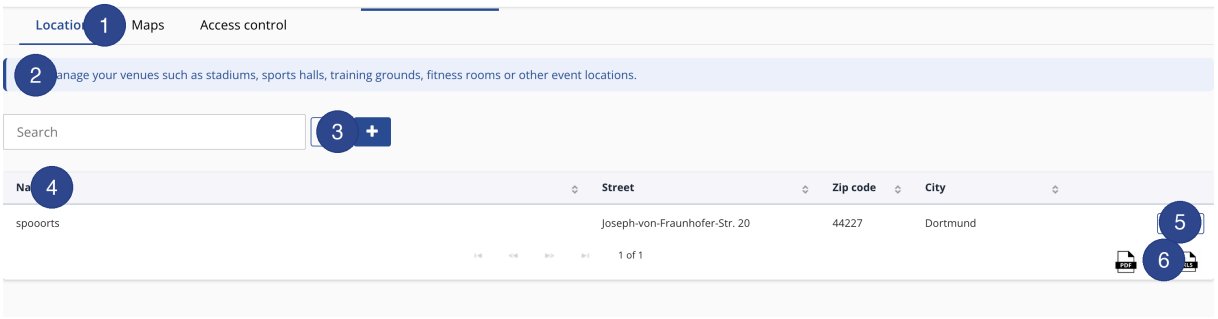


Figure 30: Locations in the spooorts Manager

① Search	Filters the location list by the text you type. The list narrows as you type, so you quickly find the right one even with many locations.
② Search	Runs the search for the entered term. Useful when you want to type the full term first and then confirm.
③ New	Opens the form to create a new location. There you enter the name, address and further details of the venue.
④ Sort columns	Sorts the list in ascending or descending order by this column. Clicking again reverses the order, keeping even long lists manageable.

⑤ **Edit**	Opens the location to change its details. Changes take effect immediately everywhere the location is used.
⑥ **Delete**	Permanently removes the location after a confirmation prompt. Remove a location from events and courses first if it is still in use.

Maps & access control

Via the **Maps** tab you place locations on a map. Under **Access control** you manage the access points of a location — for example for admission by QR code or ticket.

Tips

- Create each place once as a location — it can then be reused in events, sessions and ticket plans.
- Keep the address up to date so maps and directions are correct.
- Use access control when you want to manage admission to a location.

Weather cancellation

Outdoor dates are automatically checked against a weather rule before the start. Early checkpoints warn participants; at the decision point the date is canceled automatically or the organizer gets a cancellation proposal – every check is traceable with forecast and reason.

Overview

You find this page in the menu under **Events** › **Weather & cancellations**.

Outdoor dates are automatically checked against a **weather rule** before the start – events, course and training dates in a series, and court bookings. Early checkpoints warn participants; at the decision point the date is either **canceled automatically** or the organizer receives a **cancellation proposal**. You reach the **Weather** page from the Events, Training and Locations menus. It has two areas: **Upcoming dates** and **Weather rules**.

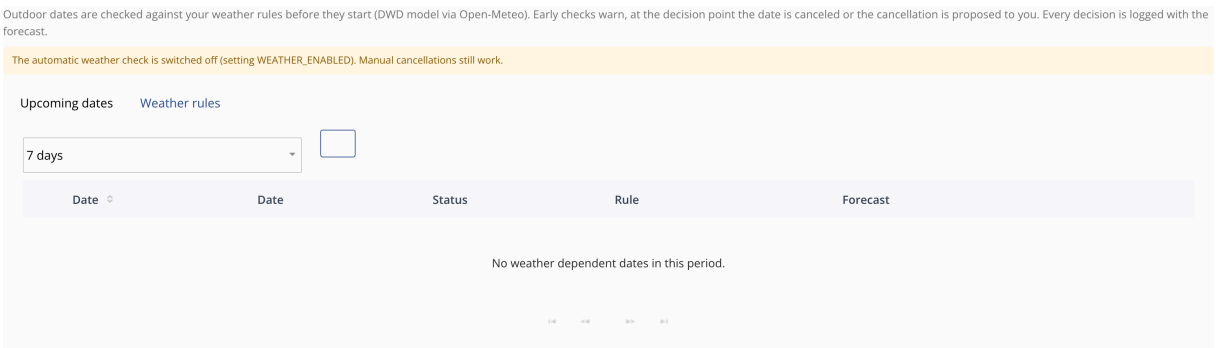


Figure 31: View in the administration area

Requirements

- The location needs an address or a map pin so coordinates are available.
- The **Outdoor** checkbox is set on the location. Rules only apply to outdoor locations – an indoor event never triggers.
- Without coordinates or without a forecast nothing happens; this is recorded as **no data**.

Creating a rule & inheritance

A rule applies to a scope and is inherited – from most specific to most general: **single date → series/event → court/resource → course → location → offer type → default**. On a tie the newest rule wins. The overview shows per date whether an **own rule** applies or it is **inherited from …**

Presets per sport

A preset only fills the thresholds and checkpoints; the rest of the rule stays. Presets exist for running/triathlon, cycling, tennis/padel, beach, sailing, kite, windsurf, surfing, SUP/kayak/rowing, diving, riding, climbing park, ski/cross-country and outdoor course/camp. Wind is also shown in knots.

Thresholds

Per rule you set thresholds: **rain** (mm and probability), **wind** and **gusts max.**, **wind min.** (sailing/kite), **temperature min./max.**, **thunderstorm**, **snow/ice**, **waves max./min.**, **visibility min.** (fog) and **snow depth min.** Waves only apply on coasts and large bodies of water. Missing values never trigger.

Checkpoints and decision point

The check runs at several times before the start, e.g. 24 h and 3 h before. Early checkpoints are **warnings**; the late one is the **decision point** where the cancellation or the proposal is triggered.

Action

At the decision point there are two actions: **cancel automatically** or **propose to the organizer**. With a proposal an email with a link is sent; you then confirm or reject the cancellation on the **Weather** page.

Consequences of a cancellation

Money	Refund, voucher (valid one year) or keep.
Replacement	Rain date (N days later, not across the year change), next series date, alternate location (indoor) or none.
Resources	Horses, boats, rooms, coaches and rental items are freed. Rental items and deposits are refunded.

Tickets	Spectator tickets become invalid and are refunded.
Single distance	The whole event only counts as canceled once all distances are canceled.
Series	The first date never cancels the whole course.
Courts	Optionally the court stays blocked.

Deciding manually

Independent of the automation there are **Cancel due to weather now** and **Hold anyway**. The **Decide / History** dialog shows the history with forecast and who decided.

Status

The status labels are: **Planned**, **At risk**, **Decision open**, **Canceled**, **Rescheduled** and **Takes place**. A weather cancellation is the same cancellation as the event status **canceled**, just with the reason **weather** – there is no second status.

Emails to participants

There are emails for **warning**, **cancellation** and **replacement**, plus the **proposal to the organizer**. They can be adjusted in five languages under **Marketing → Email campaigns → System emails**, area **Weather**.

What the app shows

The app shows the **weather-dependent** note, the rule as a sentence, the status and the decision time.

Limits

- Currently email only, no push and no SMS.
- No replacement-date choice by link.
- For an indoor replacement the room is not yet rebooked.
- The automation must be switched on by the operator; manual cancellations always work.

Related topics

- Locations
- Courses

Equipment

In the equipment area you manage club-owned gear, jerseys and material as fixed assets — including check-out, return, location, section, vendor and condition.

Overview

You find this page in the menu under **We** > **Equipment**.

In the **equipment** area you keep your organization's inventory — **gear**, **jerseys** and **material** as fixed assets. For each item you store **location**, **section**, **vendor**, **condition** and current value. Using **check-out** and **return** you keep track of who is currently using which material.

Via the lending and return function you see at any time which equipment is currently in use and who is using it; due returns and the condition of the equipment can thus be tracked seamlessly.

Viewing and managing inventory

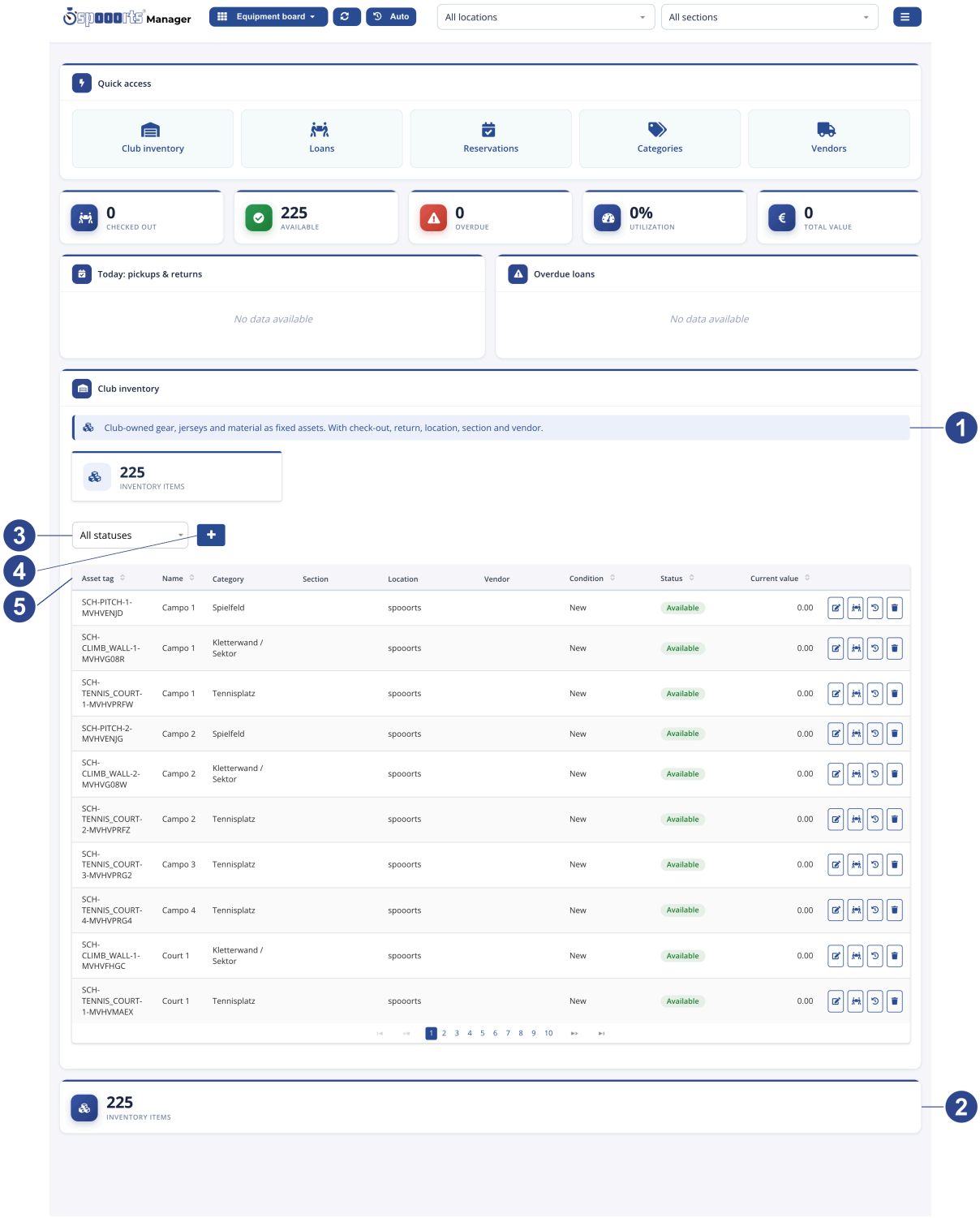


Figure 32: Equipment board in the spooorts Manager

① Note

The note explains that here you manage club-owned gear, jerseys and material as fixed assets — with check-out, return, location, section and vendor.

② Metric

The tile shows the total number of **inventory items** at a glance.

③ Status filter	Use the **All statuses** selector to narrow the list, for example to checked-out or available items.
④ Add item	Use the plus button to create a **new inventory item** with all details.
⑤ Sortable columns	The table shows **Asset no.**, **Name**, **Category**, **Section**, **Location**, **Vendor**, **Condition**, **Status** and **Current value**.

Tips

- Record valuable purchases with vendor and current value — this documents your fixed assets.
- Use check-out and return so it stays traceable who has borrowed material.
- Assign items to a section and a location to find them quickly.

Documents

The document store is your central place for bylaws, minutes, contracts, legal texts and forms — with versioning, access tiers and an optional public link.

Overview

You find this page in the menu under **We** > **Documents**.

Documents is your organization's central store for **bylaws**, **minutes**, **contracts**, **legal texts** and **forms**. Each document has a **version** and an **access tier** (visibility) — from internal to public. Public documents can be embedded via a fixed **link** (e.g. `/doc/terms`), for example on your website.

Because every document carries a version and an access level, it is always clear which version currently applies and who may see it — from the internal draft to the publicly linked form.

Viewing and managing documents

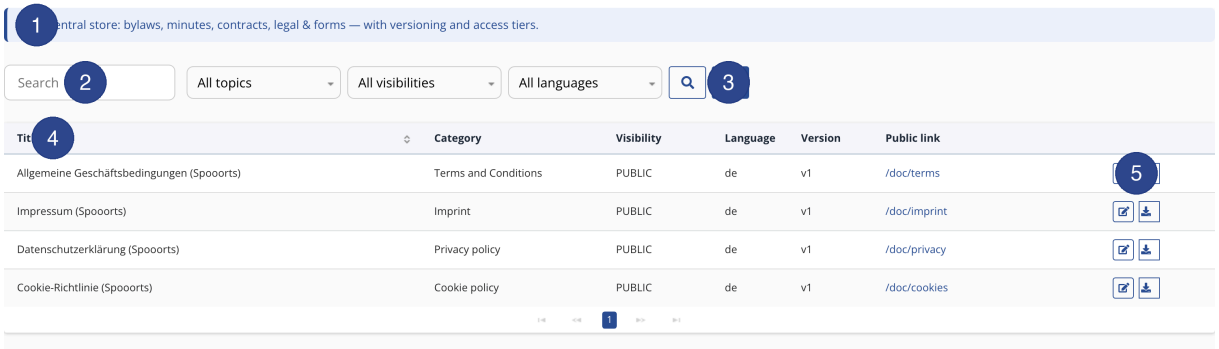


Figure 33: Document store in the spooorts Manager

① Search	Filters the document list by the text you type, e.g. by title. This helps you find

	the right one quickly even with many documents.
② **Search**	Runs the search for the entered term.
③ **New document**	Opens the form to upload or link a new document, e.g. bylaws, a form or house rules.
④ **Title**	The document's name. Click the column to sort the list alphabetically by title.
⑤ **Visibility**	Sets who may see the document, e.g. internal only or public on your website. This controls which files are visible to members or guests.
⑥ **Edit**	Opens the document to change its title, category, visibility or the stored file.

Tips

- Choose the visibility deliberately — only truly public documents should get the "PUBLIC" tier.
- Use versioning: when editing, the history is preserved.
- Link public documents (e.g. terms, privacy) via the fixed link on your website.
- File documents in suitable categories so they are quickly findable via the filters.

Receivables

In the open receivables overview you can see all payments that are authorized or in processing but have not yet been received. You can download invoices and dunning letters or send them directly by email.

Overview

You find this page in the menu under **We** › **Finance** › **Income & invoicing** › **Receivables**.

Open receivables are payments that have been initiated by your members or customers but have not yet been completed. Typical reasons include pending bank transfers, ongoing direct debit processes, or unconfirmed credit card payments. In the receivables overview you can check the status of all open payments, download invoices and dunning letters, and send them directly by email.

View and manage receivables

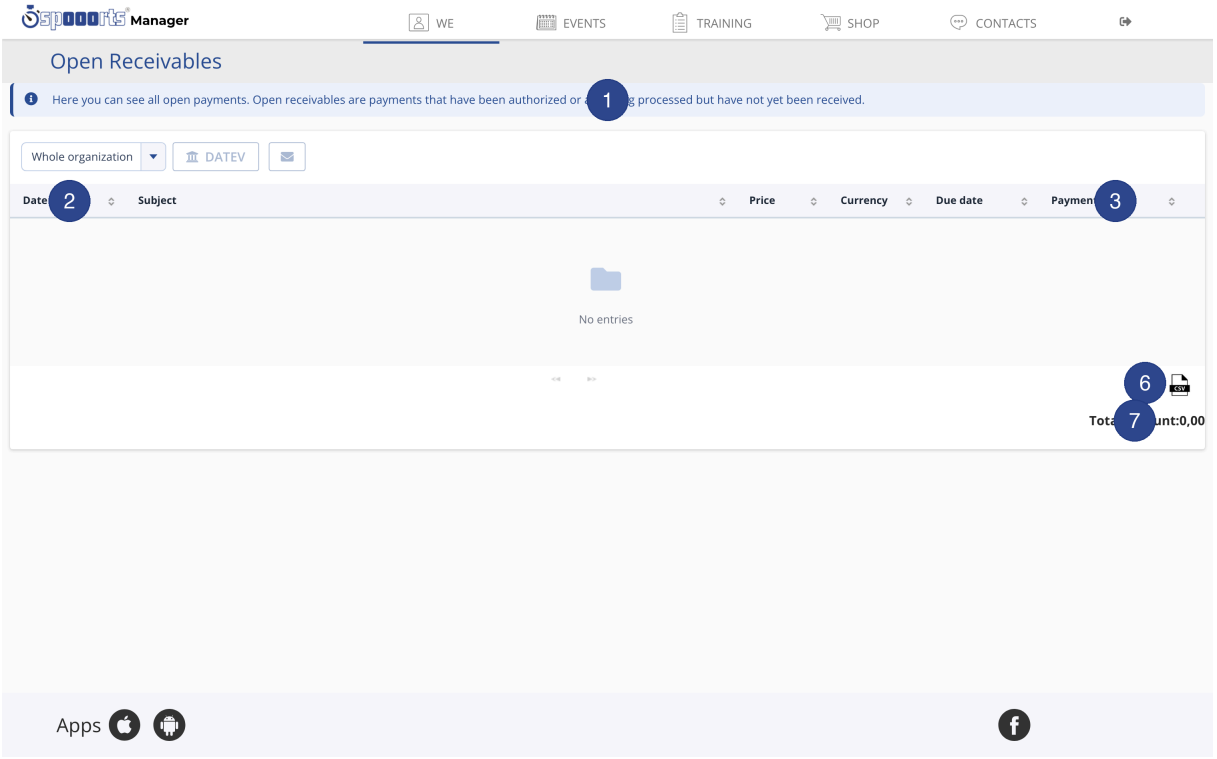


Figure 34: Overview of open receivables in the spooorts Manager

① **Filter**	Shows only the receivables of the selected unit.
② **Payment status**	Shows whether a payment is authorized, processing or overdue.
③ **Record incoming payment**	Records a manual incoming payment for this receivable.
④ **Send invoice**	Sends the invoice to the contact by e-mail.
⑤ **Send e-invoice**	Sends the electronic invoice (e-invoice) by e-mail.
⑥ **Payment reminder**	Sends a friendly payment reminder by e-mail.
⑦ **First dunning notice**	Sends the first dunning notice by e-mail.
⑧ **Final dunning notice**	Sends the final dunning notice by e-mail.

Sending emails

When you click one of the email buttons ⑤, a send dialog opens. The dialog shows the recipient name, an input field for the email address with auto-completion from your contact list, the automatically generated subject line, and the PDF attachment (invoice or dunning letter). After clicking **Send**, the email with the corresponding document as attachment is sent.

Dunning stop for fees

In the fee management you can activate a **dunning stop** for individual fees. When the dunning stop is set, no dunning letters are generated for open receivables of this fee. You can find this option in the fee settings as a checkbox.

Tips for receivables management

- Regularly check the payment status of your open receivables to detect payment defaults early.
- Use the sorting function to sort by date or amount and quickly find older receivables.
- Start with the 1st dunning and escalate to the 2nd and 3rd dunning level if needed.
- Send dunning letters directly via the email function — the recipient and attachment are filled in automatically.
- Export the receivables list regularly as CSV or Excel for your accounting.
- Use the dunning stop in the fee settings when no dunning letters should be sent for certain fees.

Invoices

The Invoices page shows all customer invoices you issued from registrations, memberships and the shop. You can download invoice PDFs or e-invoices (XML), send them by email, and export the DATEV booking batch.

Overview

You find this page in the menu under **We** > **Finance** > **Income & invoicing** > **Invoices**.

Under **Invoices** you will find every customer invoice created in the spooorts Manager — whether it originated from a registration, a membership or a sale in the shop. For each invoice you can download the invoice PDF or the electronic invoice (e-invoice in XML format), send the document directly to the recipient by email, and create dunning letters when needed. For your accounting, the entire booking batch can be exported as a DATEV file.

Views

The page is divided into two tabs. Under **Customer invoices** you see the invoices you issued to your members and customers. Under **Platform invoices** you find the invoices spooorts issues to you for using the platform.

Viewing and managing invoices

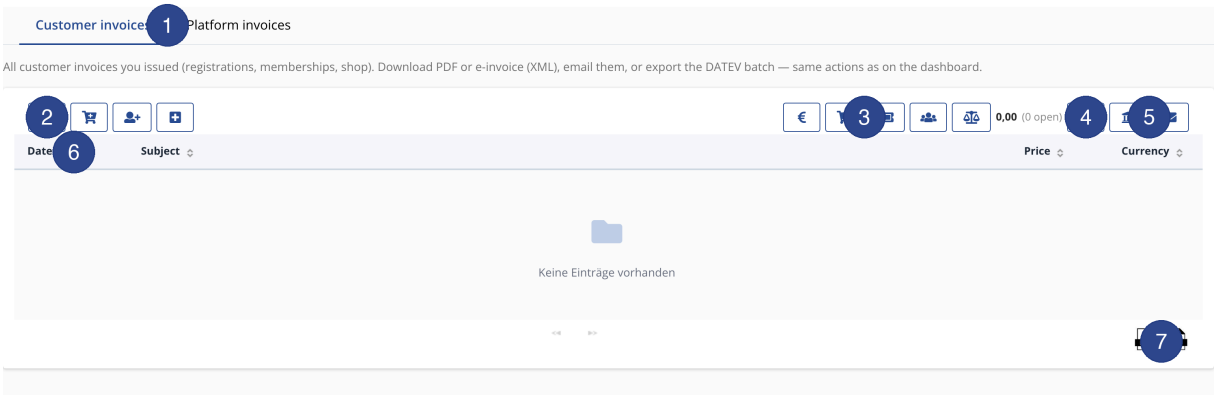


Figure 35: Customer invoices overview in the spooorts Manager

① Views	Use the two tabs to switch between **Customer invoices** (from registrations, memberships and shop) and **Platform invoices** (your invoices from spooorts).
② Create invoice	The four buttons on the left let you create a new invoice manually: **Enter registration** (calendar icon), **Enter sale** (shopping cart), **Add contact** (person) and **Enter event** (plus).
③ Sales & open receivables	This group of icons shows your revenue at a glance: **Total sales** (€), **Product sales** (cart), **Registration sales** (ticket) and **Membership sales** (people). The scales icon shows your **Total Receivables** together with the number of items still open.
④ Filter table	The filter icon (funnel) reveals filter options to narrow down the invoice list — for example by period or status.
⑤ DATEV export & send	Use the bank icon to download the **DATEV booking batch (EXTF)** for your accounting. The envelope icon next to it sends the same booking batch directly by email, for example to your tax advisor.
⑥ Sortable columns	The columns **Date**, **Remark**, **Price** and **Currency** can be sorted. Click a column header to sort the list in ascending or descending order.
⑦ Table export	Use the icons at the bottom right to export the entire invoice list as a **PDF** or **CSV** file.

Creating an invoice manually

In addition to the automatically generated invoices, you can create an invoice by hand at any time using the four buttons ②:

- **Enter registration** — creates an invoice for an event registration.
- **Enter sale** — creates an invoice for a sale from the shop.
- **Add contact** — creates an invoice assigned directly to a contact.

- **Enter event** — creates an invoice related to an event.

Downloading and sending per invoice

As soon as invoices appear in the list, each row offers several buttons. Use them to download the **invoice** as a PDF or as an **e-invoice (XML)**, create a **delivery note** when needed, and access the three **dunning levels**. Each of these documents can also be sent directly by email — the recipient and attachment are filled in automatically.

Tips for managing invoices

- Use the e-invoice (XML) when you issue invoices to customers who require an electronic invoice format.
- Export the DATEV booking batch regularly or send it directly to your tax advisor.
- Sort by date or price to quickly find specific invoices.
- Check the platform invoices to keep track of your costs for using spooorts.

SEPA Direct Debit

With SEPA you manage your members' direct-debit mandates and create SEPA runs to collect dues and receivables. The pain.008 files can be exported for your bank.

Overview

You find this page in the menu under **We** › **Finance** › **Income & invoicing** › **SEPA**.

With the SEPA direct-debit scheme you conveniently collect dues and open receivables from your members' accounts. For this you need a valid **SEPA direct-debit mandate** per member. Once the mandates are stored, you create a **SEPA run** at regular intervals that bundles all due collections and is exported as a **pain.008** file for your bank.

Views

The page is divided into two tabs: under **Mandates** you manage the individual direct-debit mandates. Under **Runs** you create and track the SEPA collections.

Managing mandates

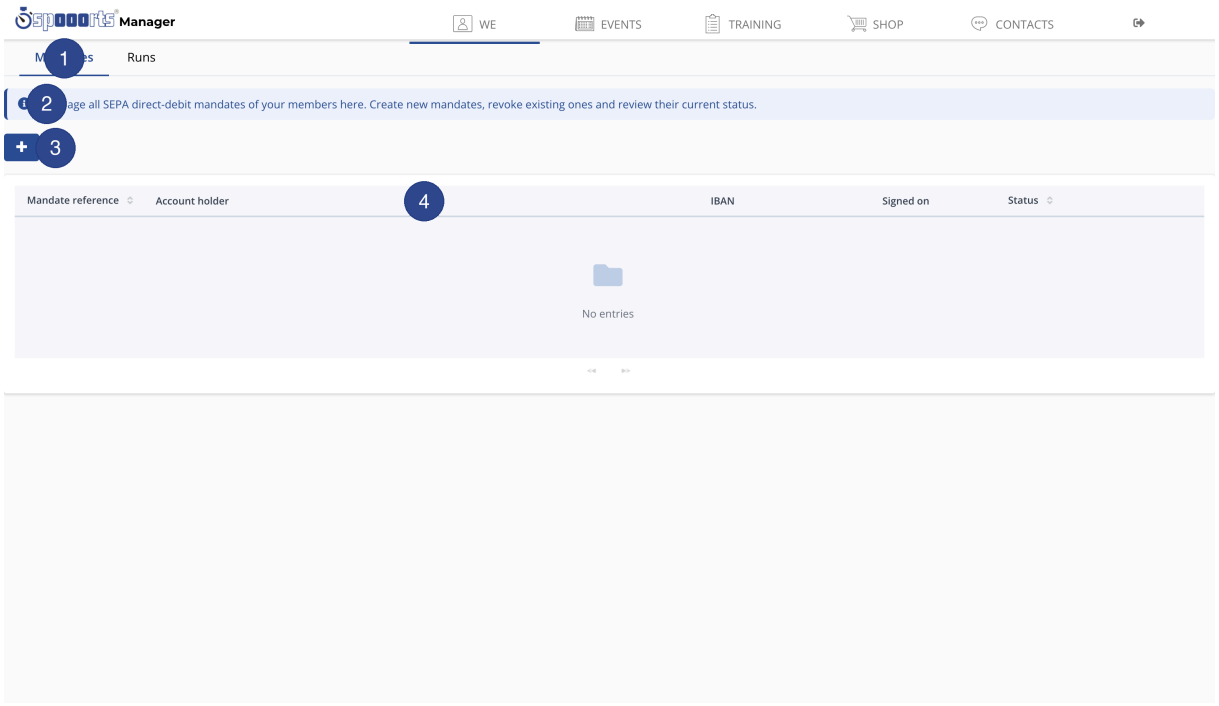


Figure 36: SEPA direct-debit mandates overview in the spooorts Manager

① **Views**	Use the two tabs to switch between **Mandates** (your members' direct-debit mandates) and **Runs** (the SEPA collections).
② **Note**	The note explains that here you manage all SEPA direct-debit mandates of your members — create new ones, revoke existing ones and review their current status.
③ **New mandate**	Use the plus button to create a **new mandate**. Here you enter the account holder, IBAN and the signature date.
④ **Sortable columns**	The table shows **Mandate reference**, **Account holder**, **IBAN**, **Signed on** and **Status**. Click a column header to sort the list.

For each mandate you will find buttons at the end of the row to **edit** and to **revoke** a mandate.

Creating SEPA runs

On the **Runs** tab you create a collection via **Create new SEPA run**. The table shows for each run the message ID, the **execution date**, the payment provider, the number of items, the **total amount** and the status. From the detail view you can download the corresponding **pain.008** file and start the run with **Run now**.

Tips for direct debit

- Create a valid mandate for every member before the first collection — without a mandate no direct debit is possible.
- Revoke mandates as soon as a member cancels or changes their account.
- Download the pain.008 file and submit it to your bank, or use the connection to your payment provider.
- Track the status of the runs to detect return debits early.

Memberships & Dues

Under Memberships you define the membership types of your club or studio — with amount, billing interval and numerous options such as trial period, fee-free months, pro-rata calculation and dunning stop.

Overview

You find this page in the menu under **Contacts** > **Memberships** > **Administration**.

Under **Memberships** you define the membership types your club or studio offers — for example "Adults", "Juniors" or "Supporting member". Each membership has an amount and a billing interval (such as monthly or yearly). Based on these memberships, spooorts generates the recurring dues that you then collect by SEPA direct debit.

Viewing and managing memberships

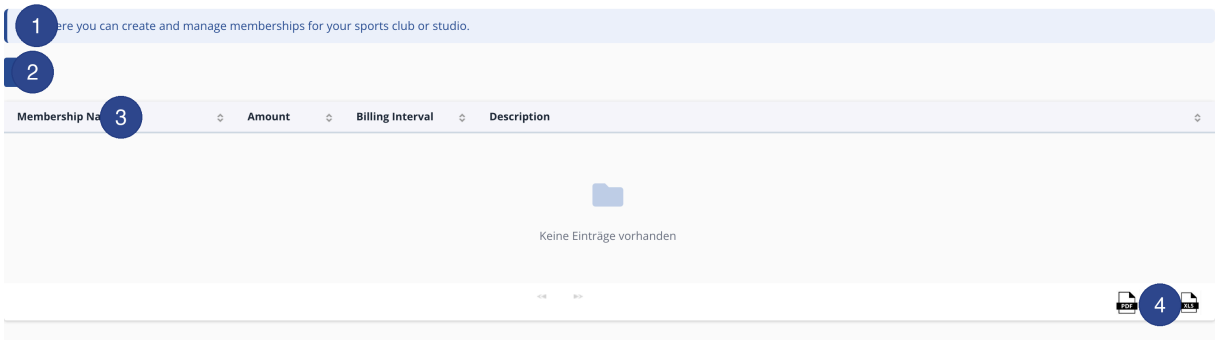


Figure 37: Memberships overview in the spooorts Manager

① **Search**	Filters the membership list by the text you type.
② **Search**	Runs the search for the entered term.
③ **New**	Opens the form to create a new membership.
④ **Sort columns**	Sorts the list in ascending or descending order by this column.
⑤ **Edit**	Opens the membership to change its details.
⑥ **Delete**	Permanently removes the membership after a confirmation prompt.

Options of a membership

When creating a membership, in addition to name, amount, currency and billing interval you have numerous options available:

- **Membership Start** — defines when the membership begins.
- **Trial period (days)** and **fee-free months** — for trial and welcome offers.
- **Pro-rata calculation for mid-month entry** — charges the first fee proportionally.
- **Suspension/pause possible** — allows pausing the membership, for example during illness.
- **Refund possible** — allows refunds for this membership.
- **Coaches/volunteers free of charge** — exempts volunteers from fees.
- **Dunning stop available** — prevents dunning for open receivables of this membership.
- **Age limits** — restricts the membership to a minimum and maximum age.

More areas of member administration

In addition to the membership types, the Memberships area offers further functions: the concrete **dues** per member, **discounts**, **contract actions**, **credit notes**, the management of **families & households** and the **lifecycle** of a membership from joining to leaving.

Tips

- Create a separate membership for each target group — this keeps the fee structure clear.
- Use fee-free months or a trial period to attract new members.
- Enable pro-rata calculation so that mid-year entries are billed fairly.
- Use the dunning stop selectively, for example for special arrangements with individual members.

Expenses & Compensation

Under Expenses you record all club expenses such as fees, rent, material and charges with category, amount and status. Via Compensation you settle freelancer honoraria and volunteer stipends.

Overview

You find this page in the menu under **We** > **Finance** > **Expenses & payouts** > **Expenses**.

In the **Expenses** area you record all expenses of your club or studio — such as fees, rent, material or charges. Each expense receives a category, an amount and a status. You can approve expenses and mark them as paid. In addition, via **Compensation** you handle payouts to coaches, volunteers and freelancers.

Viewing and recording expenses



Figure 38: Club expenses overview in the spooorts Manager

① Note	The note explains that here you record club expenses (fees, rent, material, charges), set category, amount and status, and approve expenses or mark them as paid.
② Filter	Use the **All expenses** selector to filter the list by status, for example by expenses not yet approved or already paid.
③ New expense	Use the plus button to record a **new expense** with date, category, description and amount.
④ Sortable columns	The table shows **Date**, **Category**, **Description**, **Amount (cents)**, **Status** and **Actions**. In the Actions column you approve an expense or mark it as paid.

Compensation (honoraria and volunteer stipends)

Via **Compensation** you handle freelancer honoraria (studios) and volunteer stipends (clubs). Each person receives a contract with a **type** — freelancer, coach, volunteer, mini-job or permanent employee. The type controls the tax treatment and the receipt layout. You record a **payout** with gross amount, quantity (hours), period and notes; you can then approve or cancel it.

More financial areas

In addition to expenses and compensation, the finance area offers related functions: **honoraria**, **donations** with charitable receipts, **sponsoring** contracts and **subsidies**.

Tips

- Set up meaningful categories so that expenses can be analysed easily later.
- Use the approval status to implement a four-eyes principle for expenses.
- For compensation, choose the appropriate contract type — it determines the tax treatment.
- Mark expenses as paid promptly so that your reports stay accurate.

Sponsoring

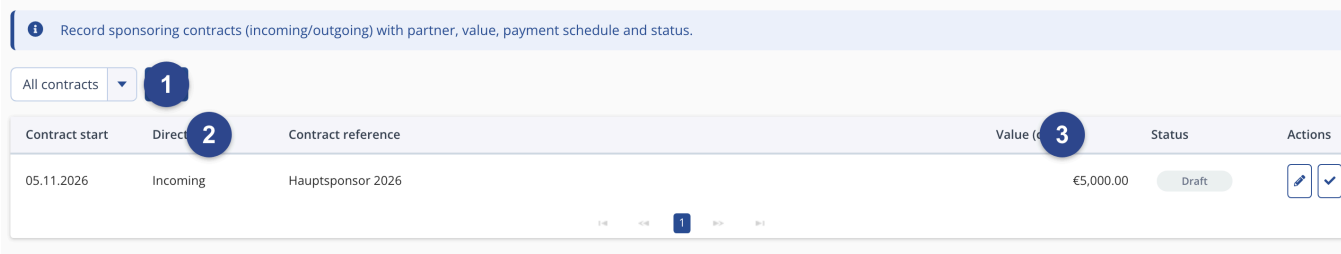
Manage sponsoring contracts (incoming/outgoing) with partner, value, payment plan and status, and embed sponsor logos.

Overview

Under **We** > **Finance** > **Expenses & payouts** > **Sponsoring** you record sponsoring contracts – **incoming** (a sponsor supports your coaching offer) or **outgoing** – with partner, value, payment plan and status. Use **New contract** to create one; it can be signed electronically (signature type *sponsoring contract*). This keeps every agreement with your sponsors in one place and cleanly separates incoming and outgoing services.

The contract list

The list shows all sponsoring contracts; the filter narrows them by status:



① **New contract**	Use the plus to create a contract; to its left you filter by status.
② **Direction**	**Incoming** (the sponsor pays you) or **outgoing**.
③ **Value (cash)**	Cash value of the contract; next to it are **contract start**, **contract reference** and **status**.

Figure 39: Sponsoring contracts with direction, value and status

Per row a contract can be edited or removed. The status shows whether a contract is draft, active or ended. The columns show at a glance the start, direction, reference, value and status of each contract.

Embedding sponsor logos

You upload sponsor logos under **Sponsors** and choose a tier per partner – **title sponsor**, **premium partner** or **partner**. Depending on the tier you present your partners on your **course and training pages**, in the **booking confirmation**, in **e-mails** and in the **app**. This makes the agreed consideration visible where your participants see it; monetary and in-kind values from the contracts also feed into your financial reporting.

Accounting

Accounting comprises the chart of accounts (SKR03/04/42) and the journals auto-generated from sales, expenses and stock movements. From here you export the data to DATEV.

Overview

You find this page in the menu under **We** > **Finance** > **Accounting**.

Accounting represents the general ledger of your club or studio. The basis is a **chart of accounts** following SKR03, SKR04 or SKR42. From your sales, expenses and stock movements, spooorts automatically generates the matching **journals**. This produces complete, DATEV-ready accounting without you having to post every transaction by hand.

Views

The page is divided into two tabs: under **Accounts** you manage the chart of accounts. Under **Journals** you see the individual postings with document number, period, source, debit and credit lines as well as the total.

Managing the chart of accounts

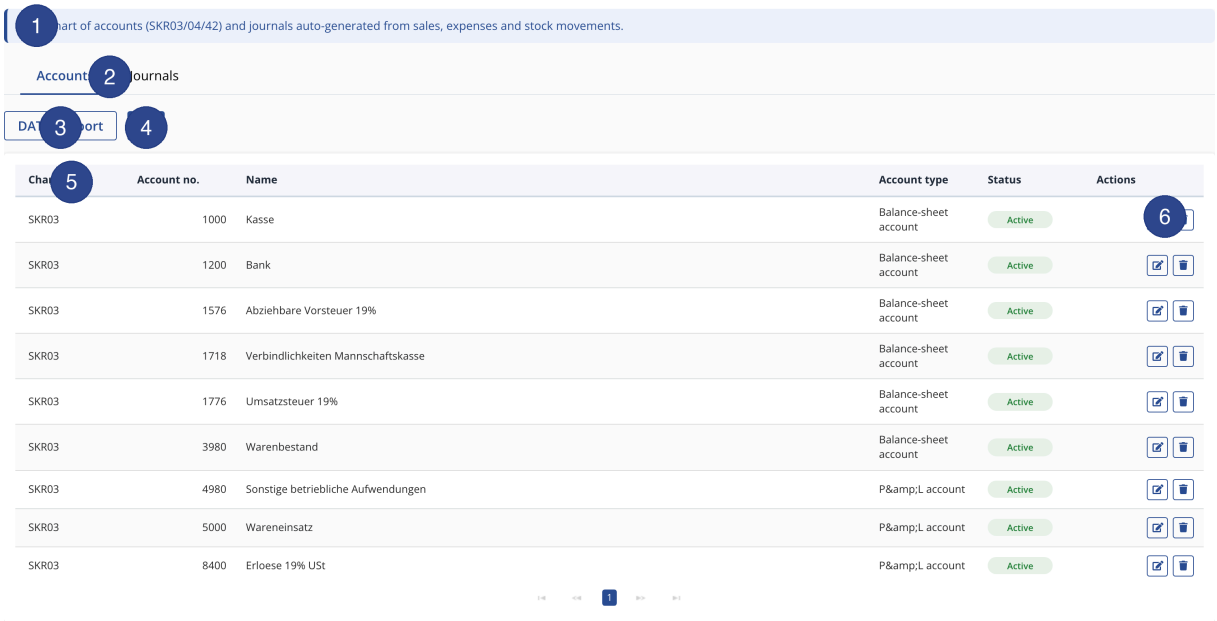


Figure 40: Chart of accounts (general ledger) in the spooorts Manager

① Note	The note explains that here you manage the chart of accounts (SKR03/04/42) and the journals auto-generated from sales, expenses and stock movements.
② Views	Use the two tabs to switch between **Accounts** (the chart of accounts) and **Journals** (the individual postings).

③ **DATEV export**	Use this button to export the accounting data in DATEV format for your tax advisor or your accounting software.
④ **New account**	Use the plus button to create a **new account** in the chart of accounts, for example an additional revenue or expense account.
⑤ **Sortable columns**	The table shows **Chart**, **Account no.**, **Name**, **Account type**, **Status** and **Actions**. Click a column header to sort.
⑥ **Row actions**	For each account you can **edit** or **delete** the account using the icons at the end of the row.

Account types

Each account has an **account type**: **balance-sheet account** (assets and liabilities, e.g. cash, bank, VAT) or **P&L account** (expenses and income of the profit and loss statement, e.g. cost of goods, revenue). In addition you can store the **normal balance** (debit or credit), the **parent account** and a **tax rate**.

Journals

On the **Journals** tab you see all automatically generated postings. Each journal has a **document number**, a **period**, a **source** (e.g. sale, expense, stock movement) as well as **journal lines** with **debit** and **credit** and a **total**.

More areas of accounting

In addition to the general ledger you will find **cost centers**, the **account mapping** (mapping transactions to accounts), the **bookkeeping export** and **budget planning**.

Tips

- Choose the appropriate chart of accounts (SKR03, SKR04 or SKR42) at the start — it forms the basis of all postings.
- Use the automatically generated journals and spot-check them instead of posting everything by hand.
- Export to DATEV regularly so your tax advisor always has up-to-date data.
- Only create additional accounts when you really need them — a lean chart of accounts stays clear.

Country Tax Configuration

Depending on your organization's country, spooorts offers country-specific tax and compliance features — such as e-invoicing (Italy), MTD and Gift Aid (UK), SII (Spain), Factur-X (France) and Sales Tax (US).

Overview

You find this page in the menu under **We** > **Finance** > **Income & invoicing**.

Tax and reporting obligations differ from country to country. spooorts therefore shows suitable extra functions depending on your **organization's country**. These include, among others:

- **Italy** — electronic invoicing via SdI and Corrispettivi.
- **United Kingdom** — MTD VAT return and **Gift Aid** (donation tax reclaim).
- **Spain** — SII / Facturae.
- **France** — Factur-X / Chorus Pro.
- **USA** — Sales Tax.

These areas appear only when enabled for your country. The following example shows the UK **Gift Aid** configuration.

Example: Gift Aid (UK)

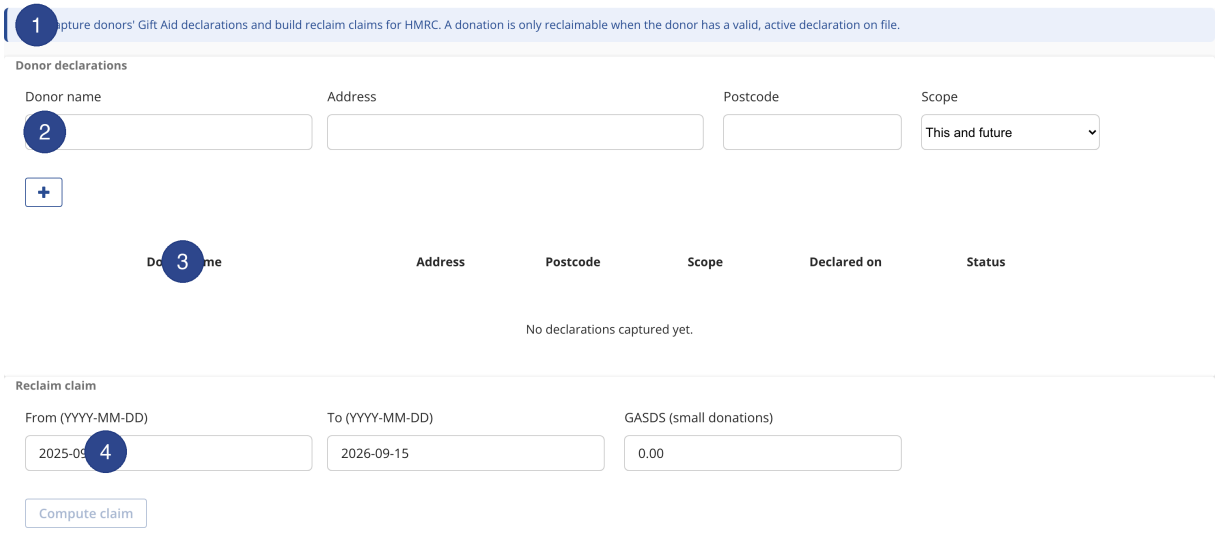


Figure 41: Gift Aid configuration in the spooorts Manager

① Note	The note explains the purpose: capture donors' Gift Aid declarations and build reclaim claims for HMRC. A donation is only reclaimable when a valid, active declaration is on file.
② Capture declaration	In the **Donor declarations** area you enter **Donor name**, **Address**, **Postcode** and

	Scope and add the declaration using the plus button.
③ **Declarations table**	The table lists the captured declarations with **Donor name**, **Address**, **Postcode**, **Scope**, **Declared on** and **Status**.
④ **Reclaim claim**	In the **Reclaim claim** area you choose the period (**From**/**To**) and the **GASDS** (small donations) and use **Compute claim** to calculate the reclaim.

Tips

- Only enable the country functions you actually need — otherwise they do not appear in the menu.
- For Gift Aid, keep donor declarations up to date — without a valid declaration no reclaim is possible.
- Check the country-specific formats (e-invoice, SII, Factur-X) with your tax advisor before using them in production.

Financial Reports

The financial reports provide ready-made reports on tax, revenue, receivables and more — each for a freely selectable period and exportable as PDF, CSV or Excel.

Overview

You find this page in the menu under **We** › **Finance** › **Reports**.

Under **Reports** you will find a range of ready-made financial reports — from the VAT overview and revenue development to open items and dunning levels. Each report refers to a freely selectable period and can be exported as PDF, CSV or Excel. This gives you all the figures for your accounting, your tax advisor or your advance VAT return at your fingertips.

Selecting a report

You open the individual reports via the **Reports** menu. The following example shows the **VAT overview**.

Viewing a report

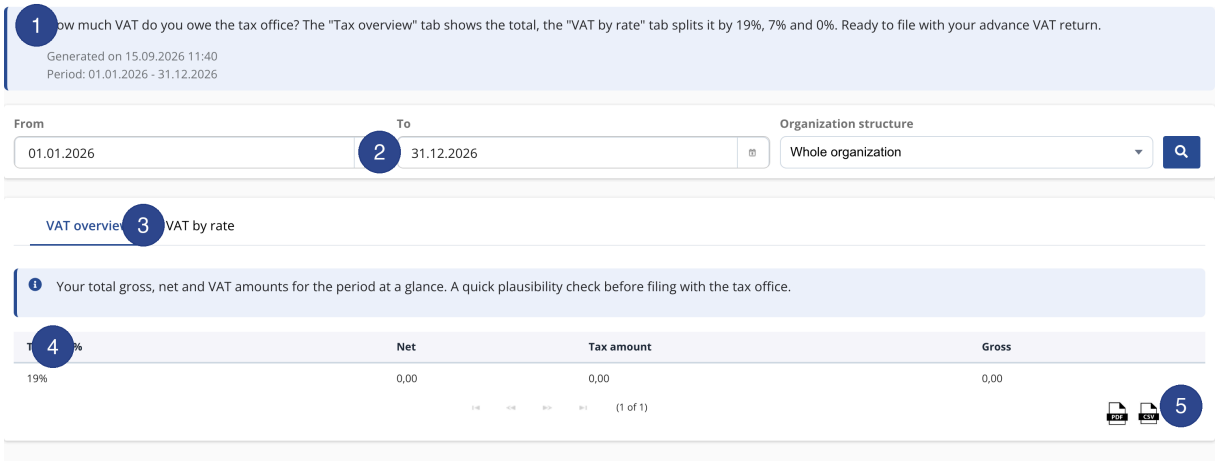


Figure 42: Financial report (VAT) in the spooorts Manager

① Description & period	The header explains what the report shows and states when it was generated as well as the analysed **period**.
② Period & organization structure	Use the **From** and **To** fields to set the reporting period. With **Organization structure** you restrict the report to part of your organization. Clicking the magnifier refreshes the report.
③ Report views	Many reports offer several tabs — in the example **VAT overview** (total) and **VAT by rate** (split by tax rate).
④ Report table	The table shows the analysis — in the example, per tax rate the **Net**, **Tax amount** and **Gross** figures.
⑤ Export	Use the icons at the bottom right to export the report as a **PDF**, **CSV** or **Excel** file.

Available reports

The available reports include, among others:

- **VAT** — gross, net and VAT for the period, as a plausibility check before the advance return.
- **Revenue & sales** — revenue development by source.
- **Open items** and **dunning levels** — status of receivables and dunning.
- **Invoice overview** and **refunds**.
- **DATEV postings** and **monthly reconciliation** for accounting.
- **Membership fees**, **donations** and **SEPA status** for club administration.

Tips

- Choose the period to match your return or billing interval (month, quarter, year).
- Use the VAT report as a plausibility check before you submit the advance return.
- Export reports as CSV or Excel for further processing or as PDF for filing.

- With several departments, narrow down specifically via the organization structure.

Privacy

The privacy area helps you fulfill data subject rights under the GDPR: data access and export (Art. 15/20), anonymization (Art. 17) and the management of incoming requests with deadlines.

Overview

You find this page in the menu under **Contacts** > **Privacy**.

In the **Privacy** area you fulfill the **data subject rights** under the GDPR (Art. 15/17/20). For a data subject you can **export** the stored data, preview and perform an **anonymization**, and manage incoming **requests** with their deadlines. The underlying legal framework (e.g. EU_GDPR with a 30-day deadline) is configurable. Note: spooorts provides tools, not legal advice.

Data access, export & anonymization

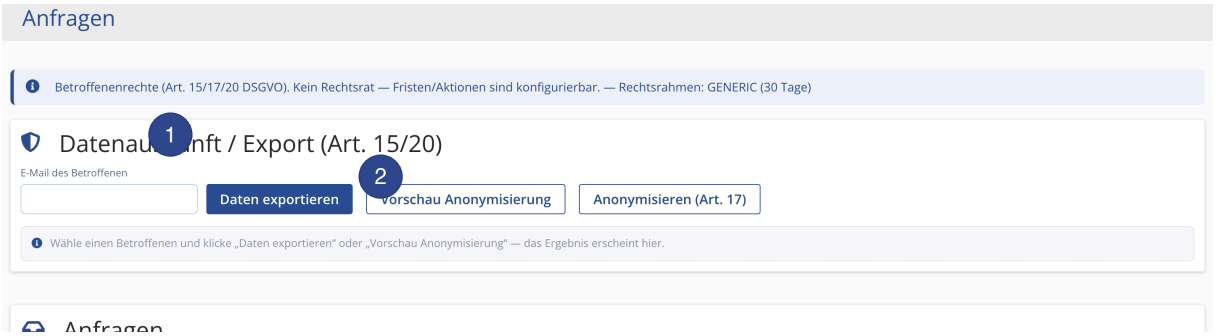


Figure 43: Data subject rights in the spooorts Manager

① **Note**	The header states the covered data subject rights (Art. 15/17/20 GDPR), the legal framework and the deadline. Deadlines and actions are configurable.
② **Data access & export**	Enter the **data subject's email** and choose an action: **Export data** (access under Art. 15/20), **Preview anonymization** (shows what would be anonymized) or **Anonymize (Art. 17)** (right to erasure/anonymization). The result appears directly below.
③ **New request**	Use the plus button to record a **new request** from a data subject so you can track it with a deadline and status.
④ **Requests table**	The table shows **Type**, **Subject**, **User-ID**, **Received**, **Deadline** and **Status** for each request — so you never lose track of a deadline.

More privacy areas

In addition to data subject rights, the privacy area offers further functions: the management of **consents**, the **retention catalog** (deletion periods per data type), the reporting of **data breaches** and the register of **processors**.

Tips

- Handle requests promptly — the statutory deadline is usually one month.
- Use the **Preview anonymization** before you anonymize permanently.
- Document every request via the requests list to be able to prove compliance.
- Keep the retention catalog and the register of processors up to date.

Payments & Finance

Online payments for training sessions, automatic invoicing, financial overview with revenue and refunds, and DATEV-compatible export for your accounting.

Payment Processing

You find this page in the menu under **We** > **Finance**.

Athletes pay for their training sessions directly at the time of booking via the spooorts payment gateway. The payment is processed securely and your earnings are transferred reliably to your registered bank account.

- Automatic payment processing on every online booking
- Payout to your bank account on a configurable cycle (weekly, biweekly, monthly)
- Transparent service fees: 5 % on Start, 3 % on Pro
- Real-time notification on incoming payments
- Automatic matching of payments to bookings and athletes

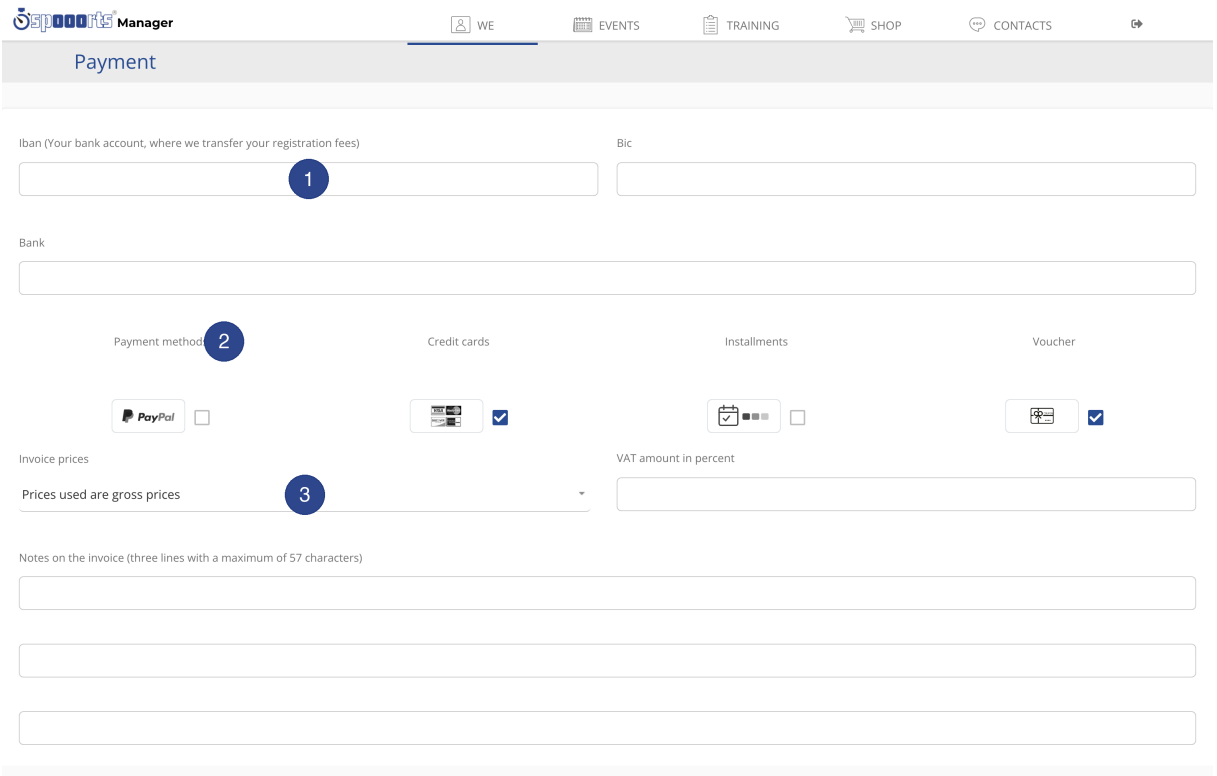


Figure 44: View in the administration area

Payment Methods

spooorts.coach supports all common payment methods so that your athletes can pay the way they prefer.

- Credit card (Visa, Mastercard and other major cards)
- PayPal
- SEPA direct debit and bank transfer (with manual confirmation)
- Cash payment on site with manual confirmation in the dashboard
- Session packs and credit bundles: athletes pre-purchase credits and book against them

Session Pricing

Define your prices flexibly — per session, as a course block package, or as a subscription. Discounts and promotional prices are easy to configure.

- Individual price per session type and duration
- Volume pricing: lower per-session price for larger packs (e.g. 10-session card)
- Early-bird pricing with automatic cut-off date
- Discount codes (percentage or fixed amount, single-use or multi-use)
- Club member discount when linked with spooorts.club
- Free trial sessions as a separate price point
- Different prices for one-on-one, small group, and group training

Invoicing

spooorts.coach automatically generates invoices for every booking. Invoices comply with German requirements and can be downloaded as PDF by the athlete.

- Automatic invoice creation on every payment
- Sequential invoice numbering
- Invoice template with your logo, address, and tax number
- VAT display configurable (standard VAT / small business exemption)
- Invoices sent to the athlete by email
- PDF download available for athlete and coach at any time
- Credit notes automatically created on refunds

Refunds & Cancellations

Refunds are processed automatically according to your configured cancellation policy. Manual refunds for special cases are also possible.

- Automatic full refund within the free cancellation window
- Partial refund after the deadline (configurable percentage)
- Refund to the original payment method
- Manual refund with a custom amount
- Voucher instead of refund offered as an alternative
- Refund history with date, amount, and reason

Financial Overview & Reports

The finance dashboard gives you a complete real-time overview of your revenue, refunds, outstanding payments, and net earnings.

- Total revenue, refunds, and net earnings at a glance
- Breakdown by session type, payment method, and time period
- Payment status per athlete (paid, outstanding, overdue)
- Day, week, and month comparison with charts
- Forecast of projected monthly revenue based on booked sessions
- Export as CSV, Excel, or PDF
- DATEV-compatible export for German tax advisors and accounting software
- Annual summary for tax returns

Pricing & Plans

spooorts.coach offers three plans — from the free Start version to your own native app on the Max plan. Transparent pricing, cancel monthly, no hidden costs.

Plan Overview

You can find this page in the menu under **We** > **Settings** > **Passes**.

Choose the plan that fits your coaching business. All plans include the core features — higher plans add own branding, lower service fees, and native apps.

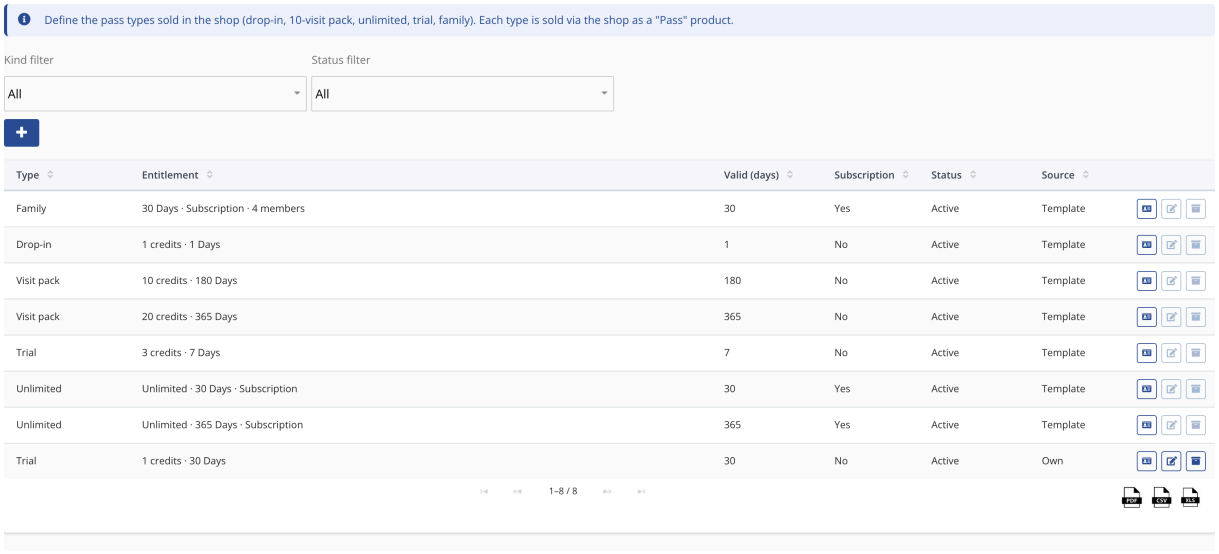


Figure 45: View in the administration area

Start — Free

The Start plan is permanently free and includes all essential features for getting started as a sports coach with your own online presence.

- Own coach website as a Progressive Web App
- Custom design with logo and colors
- URL in the format `myname.spooorts.de`
- Online booking system for athletes
- Full coach management software (athletes, bookings, finances)
- Push notifications and email communication
- QR code check-in and attendance tracking
- 5 % service fee on online payments
- No monthly fees
- No setup costs
- Subtle spooorts logos displayed on the website

> **Tip:** The Start plan is perfect for coaches who are just starting out or have a manageable training volume. You can upgrade at any time.

Pro — monthly, price based on your size (see price calculator)

The Pro plan is aimed at coaches with professional ambitions who want to appear under their own branding and benefit from reduced service fees.

- All Start plan features
- Custom subdomain (e.g. `training.mydomain.com`)
- Your own logo instead of spooorts logos — full white-label experience

- Only 3 % service fee on online payments
- Priority support via email and chat
- Advanced statistics and reports
- Email campaigns with your own branding
- Cancel monthly — no minimum contract
- No setup fee

Max — monthly, price based on your size (see price calculator)

The Max plan is designed for sports schools, academies, and ambitious coaches who want their own app in the app stores and the full feature set.

- All Pro plan features
- Own native iOS and Android app under your name in the app stores
- Custom app icon, splash screen, and app name
- All iOS and Android updates included
- Built-in GPS tracker for outdoor training (running, cycling, hiking)
- Biometric login (Face ID, Touch ID)
- Offline access to training plans
- Fully custom domain possible
- Dedicated account manager
- Cancel monthly — no minimum contract
- €299 one-time for setup and your own app

> **Important:** Publication of your native app in the stores takes 4–6 weeks after design approval. Apple and Google developer fees are included in the setup cost.

Plan Comparison

The following overview highlights the key differences between the three plans:

- **Website & PWA** — Start: yes | Pro: yes | Max: yes
- **Native App in Stores** — Start: no | Pro: no | Max: yes
- **Own Branding (no spooorts logo)** — Start: no | Pro: yes | Max: yes
- **Custom Subdomain/Domain** — Start: no | Pro: subdomain | Max: full domain
- **GPS Tracker** — Start: no | Pro: no | Max: yes
- **Service Fees** — Start: 5 % | Pro: 3 % | Max: 2 %
- **Monthly Cost** — Start: €0 | Pro: by size | Max: by size
- **Setup Cost** — Start: €0 | Pro: €0 | Max: €299

Billing & Cancellation

Pro and Max plans are billed monthly and can be canceled at any time effective at the end of the current billing period. On cancellation your access remains until the paid period ends; afterwards your account is automatically downgraded to Start.

- Monthly billing via credit card or SEPA direct debit
- Annual prepayment with 2 months discount available
- Cancel any time through the dashboard — no notice period
- On downgrade to Start, all athlete data and booking history are preserved
- 14-day money-back guarantee on the setup fee

Designer

Design your own personal trainer website and app directly online — with custom course ticket design, room planning and complete coach branding.

Design Your Own Coach Website Online

You can open the Designer from the spooorts Manager under **We** > **Website & App** or directly at designer.spooorts.app.

The spooorts Designer at designer.spooorts.app is the online tool for personal trainers and coaches who want to design their own website professionally. Whether it is one-on-one training, group workshops or bootcamps — all visual changes are instantly visible on your website and in your app. No coding skills required.

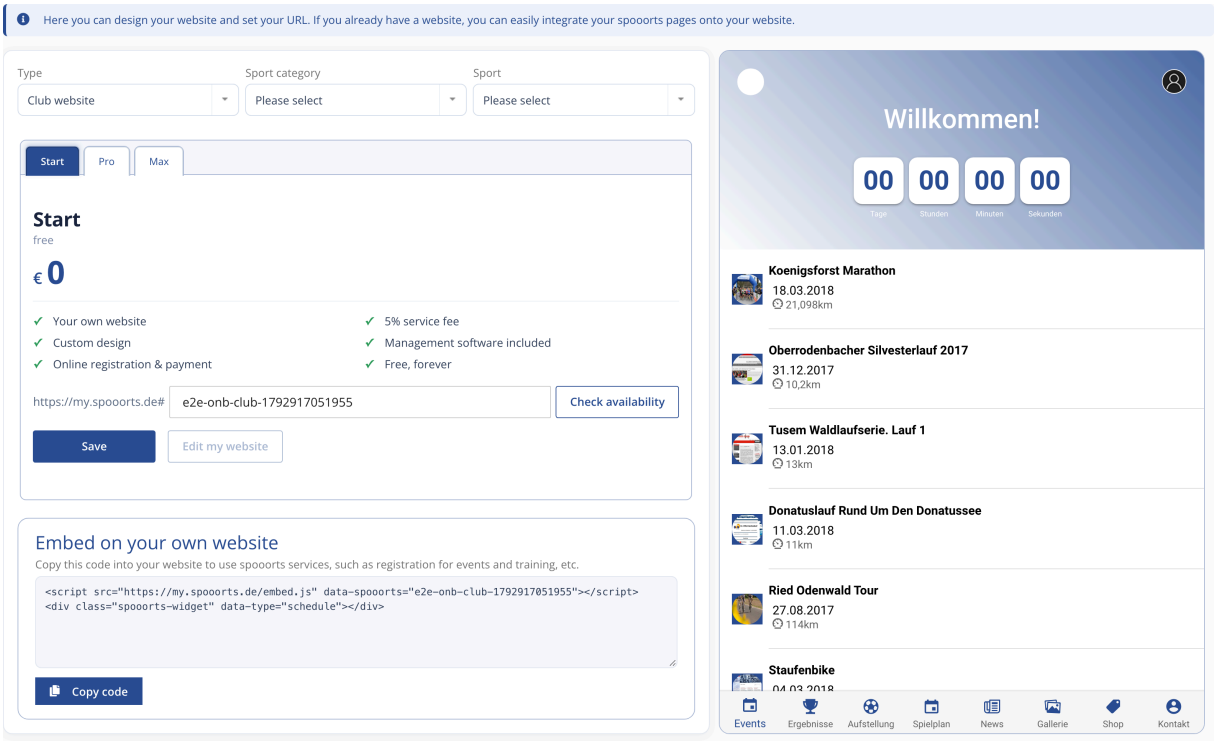


Figure 46: View in the administration area

Create Course Tickets Online

Create your own ticket design for workshops, seminars and course spots directly in the browser. Upload your coach logo, define your brand colors and generate participation tickets with integrated QR code for check-in. Each ticket is available as a digital app

ticket and as a printable ticket — perfect for bootcamps, personal training sessions and workshops.

Room Plan for Training and Workshops

Build your own room plan using drag-and-drop. Create training areas, workshop rooms and equipment zones. Assign capacities and price categories — so your participants can select their preferred spot or training area directly when booking.

Customize Your Coach Branding

Define your complete look and feel as a personal trainer with primary and secondary color, coach logo and theme. Enable or disable modules like course calendar, results, news, photo gallery, shop or contact page as needed — so your trainer website shows exactly the features your clients and participants need.

Professional Coach Templates

Start with ready-made templates for course tickets, room plans and coach branding. Every template has been optimized for personal trainers and coaches, is fully customizable and ready to use immediately. Choose a design, adapt it to your brand and publish it with one click.

Payment methods & payout

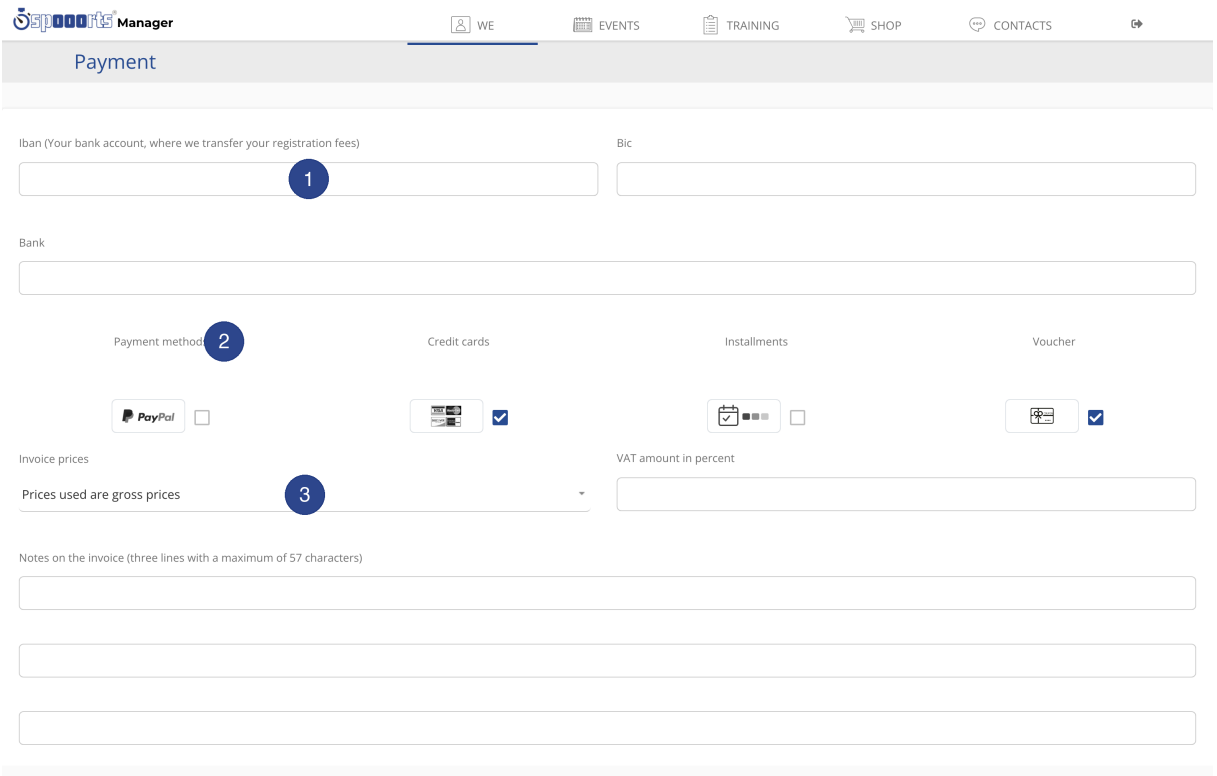
Which payment methods you offer your participants, how you set up payment on account, and how you enable payouts through Stripe Connect.

Overview

Under **Payment** you store the bank account for your payouts and enable the payment methods participants can choose at checkout.

Payment methods

Menu path: We → Payment



1	Iban / Bic / Bank – your bank account for payouts
2	Payment methods (PayPal, credit cards, voucher, installments)
3	Invoice prices (gross/net) and VAT amount in percent

Figure 47: Payment screen with bank account and enabled payment methods

The available payment methods are:

- Credit cards
- PayPal
- GiroPay
- Instant Bank Transfer
- Installments
- Voucher

In addition you set **Invoice prices** (gross or net), the **VAT amount in percent** and the **Notes on the invoice** (three lines with a maximum of 57 characters).

Payment on account

Payment on account has its own fields:

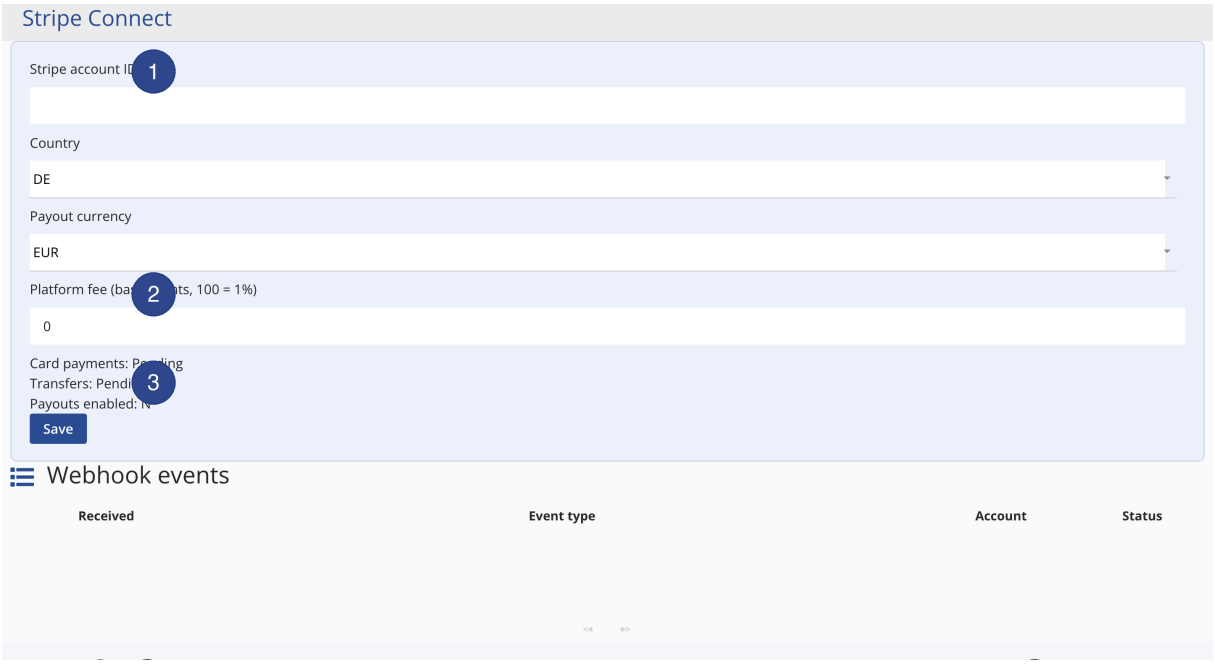
Offer payment on account	enables payment on account.
Minimum amount / Maximum amount (0 = unlimited)	limits payment on account to an amount range.
Payment terms (days)	due period for payment.

Remittance reference prefix	prefix of the payment reference.
Billing address required	requires a billing address.
Send the invoice by e-mail automatically	sends the invoice automatically.

Stripe Connect & payout

Menu path: We → Stripe Connect

For payouts you connect a **Stripe Connect account**. Only once the account is ready do payments flow to you.



1	Stripe account ID, country and payout currency
2	Platform fee (basis points, 100 = 1%)
3	Card payments / Transfers / Payouts enabled – the capability status

Figure 48: Stripe Connect screen with account, fee and capability status

Stripe account ID	the ID of the connected account.
Country	country of the account.
Payout currency	currency of the payouts.
Platform fee (basis points, 100 = 1%)	the platform's share.
Card payments / Transfers	capability status (pending or enabled).
Payouts enabled	Y once payouts are running.

Under **Webhook events** you see the events reported by Stripe (received, event type, account, status).

Limits

> **Note:** As long as the Stripe account is not **ready**, card payments and transfers stay *pending* and **Payouts enabled** is *N*; no payouts flow yet.

Scheduled tasks & jobs

Schedule time-controlled batch tasks via a cron expression, run them manually, edit and delete.

Overview

Under **ADMIN** > **Jobs** you plan time-controlled batch tasks. Scheduled batch tasks of the backoffice and spooortsbatch modules: importers, robots, syncs and the dispatch jobs of the mail campaigns all run through the same scheduler – automatically by cron expression or on demand. The schedule lives in the boschedjob table; the triggers are rebuilt from it when the server starts.

The task list

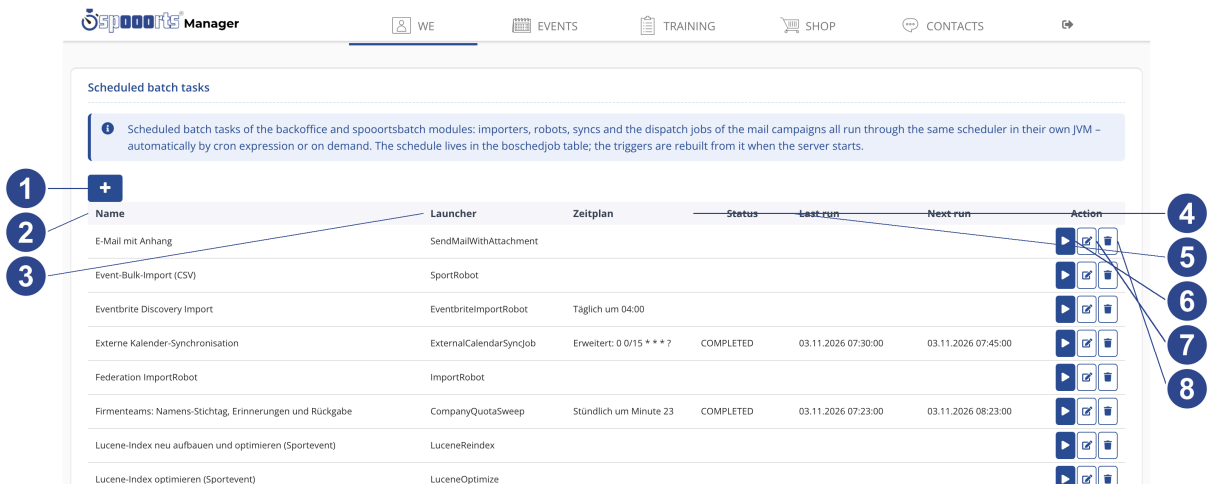


Figure 49: List of scheduled batch tasks

① **New task**	Creates a new scheduled task – with launcher and schedule. Useful e.g. for recurring imports or reminders.
② **Name**	The task's name, so you can tell at a glance what it does.
③ **Launcher**	The executing component (robot/class) that does the actual work when the task runs.
④ **Schedule**	The schedule as a cron expression. If empty, the task runs only when you start it manually.

⑤ **Status**	The current state of the task, e.g. completed or currently running.
⑥ **Run now**	Runs the task immediately by hand, regardless of the schedule, e.g. for testing.
⑦ **Edit**	Opens the task to change its launcher, schedule and parameters.
⑧ **Delete**	Permanently removes the scheduled task after a confirmation prompt.

Create, edit, run

With **+** you create a **new task** (General and Schedule sections). The **schedule** is a **cron expression** – format `sec min hour day-of-month month day-of-week`, e.g. `0 0 3 * * ?` daily at 03:00. Per row: **Run now** (play), **Edit**, **Delete**; a **task log** shows the runs.

Limits

> **Note:** Importers and robots (e.g. ImportRobot) are internal system tasks. The sending jobs of mail campaigns are managed in the campaigns themselves.

Roles & permissions

Manage roles and permissions via the permission matrix, assign users to a category and trace changes in the audit log.

Overview

Here you can manage roles, permissions and assign users to a category. This lets you define exactly who may see and edit which areas – from read-only access to full administration. The mask has three tabs: Permission matrix, Category assignment and Organisation roles.

Permission Matrix

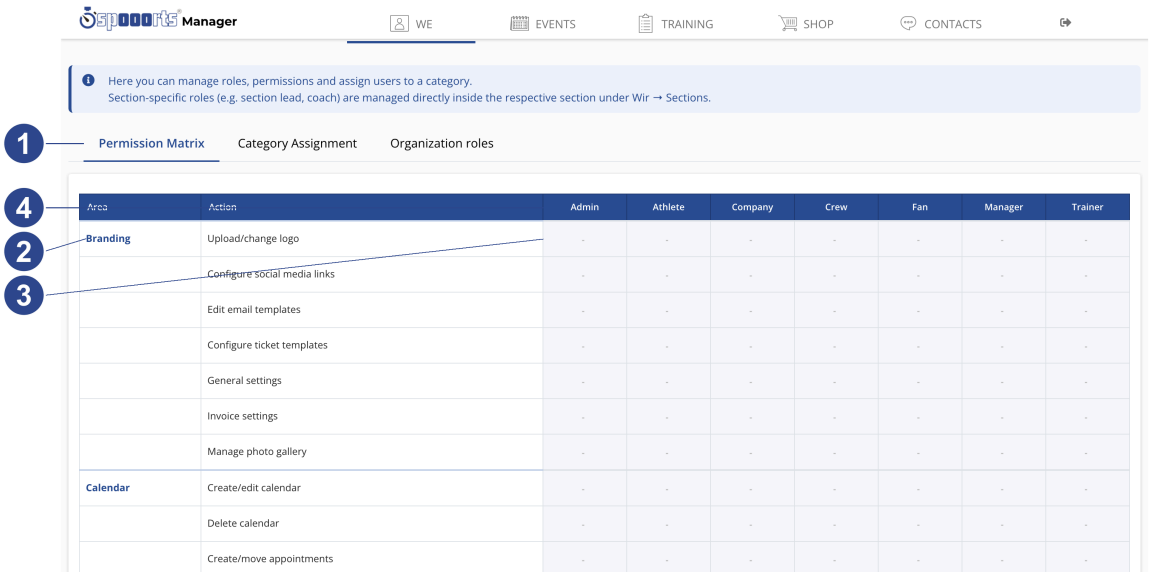


Figure 50: Permission matrix: areas and actions per category

① Tabs	Switches between the permission matrix, the category assignment (which users belong to which category) and the organisation roles.
② Area & action	Each row is a single action within an area, e.g. "View/manage registrations" in the Registrations area. The area is shown as a heading on the left, the action right next to it.
③ Permission	The cell shows a role's right for this action: L = read, L/S = read + write, – = no access. As an administrator you cycle the right by clicking the cell.
④ Role column	Each column stands for a role. The column header names the role; below it each action shows that role's right.

The **permission matrix** lists per **area** the possible **actions** (rows) and per **category** (role, columns) the level: **L** = read, **L/S** = read + write, **–** = no access. Section-specific roles (section lead, coach) are managed in the respective section under We → Sections. Set permissions sparingly: each category should open only the areas it really needs.

Category Assignment

In the **Category assignment** tab you assign a user to a **category** (role) – via **Assign category** with a scope. The scope limits the role to a section or the whole club; a user can have several categories.

Organization roles

Organisation roles result from team/board membership and grant permissions automatically (read-only). They cannot be edited directly here but change automatically when the team or board membership changes.

Audit log

The **audit log** (Contacts → Data protection) records changes with the columns: Time · Action · Actor · Target · Details. This way every permission change is fully traceable – important for data protection and internal control.

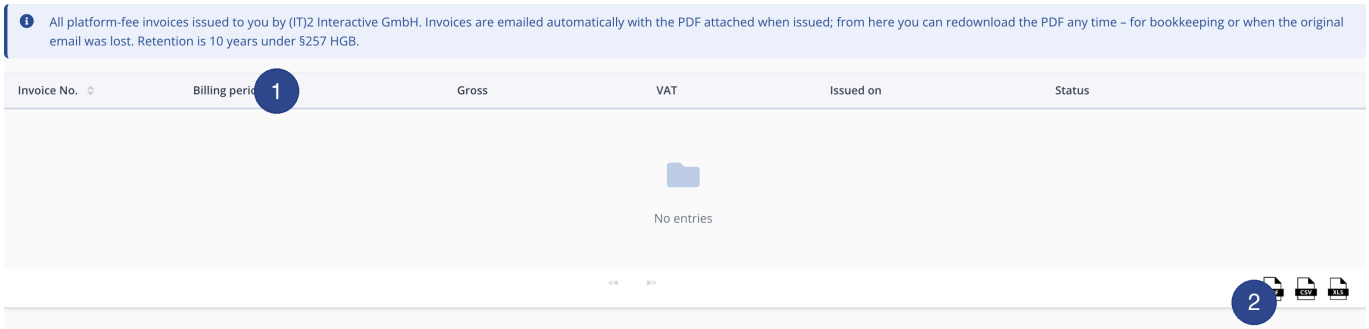
Platform invoices & payment links

Download the platform-fee invoices issued by spooorts and view the payment links sent by email.

Overview

Under **We** > **Finance** > **Income & invoicing** > **Platform invoices** you find all platform-fee invoices issued to you by (IT)2 Interactive GmbH. These are the invoices for the spooorts usage fees – not to be confused with the invoices you issue to your own members. Invoices are sent to you automatically by email with a PDF when issued; here you can download the PDF again at any time – for incoming bookkeeping or if the email is lost. Retention is mandatory for 10 years. This keeps your operating expenses for spooorts complete and audit-proof at all times.

The invoice list



1	Invoice list with number, period, gross, VAT, status
2	Export the whole list as PDF, CSV or XLS

Figure 51: Platform invoices with export (PDF, CSV, XLS)

The columns of the list are: **Invoice no.**, **Billing period**, **Gross**, **VAT**, **Issued on** and **Status**. Per row you download the **PDF** and – where available – the **e-invoice** (XRechnung/ZUGFeRD) that you can import directly into your accounting. Using the export buttons at the bottom right you output the whole list as **PDF**, **CSV** or **XLS** – handy for passing it to the tax advisor or for the annual accounts. The **status** shows whether an invoice is open or already paid.

Payment links

Here you see all payment links sent by email (real-time SEPA submission). You can resend expired or lost links so that open platform fees get settled. A payment link takes the payer straight to settlement; after a successful payment the related invoice is marked as paid.

> **Note:** This feature is currently temporarily disabled (Stripe SDK upgrade).

Signatures

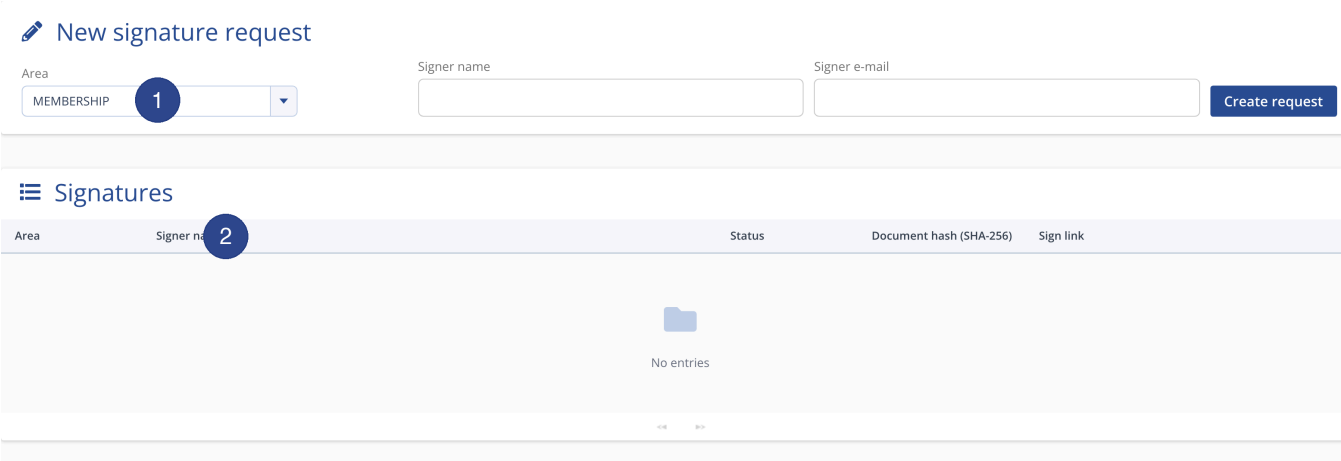
Have documents signed electronically – with a document hash (SHA-256) and a signing link by email.

Overview

Under **We** > **Finance** > **Income & invoicing** > **Signatures** you have documents (e.g. memberships or contracts) signed electronically. Each request gets a **document hash (SHA-256)** and a **signing link** that the signer receives by email. This documents signatures digitally, without sending paper. The signatures are attached to the respective documents and can be called up again at any time for verification.

New request

Under **New signature request** you request a signature:



1 – New signature request	Choose the **area** (e.g. membership), enter **name** and **email of the signer** and click **Create request**.
2 – Signatures list	Shows per entry **area**, **name**, **status**, **document hash (SHA-256)** and the **signing link**.

Figure 52: New signature request and signatures list

With **Create request** the signing link is generated and sent by email to the signer. The area determines which document is signed. As long as no signature exists, the entry stays

open; after signing it is completed. You create several requests one after another, for example for different members.

Process & proof

The signer opens the link, checks the document and signs electronically; the **status** in the list changes from open to signed. The **document hash** ensures that exactly the presented version was signed – any subsequent change would alter the hash. This gives you a verifiable, legally secure proof of the signature that can be called up at any time via the list. Because the link is personalised, only the addressed signer can sign the document, and you immediately see in the list which signatures are still outstanding.

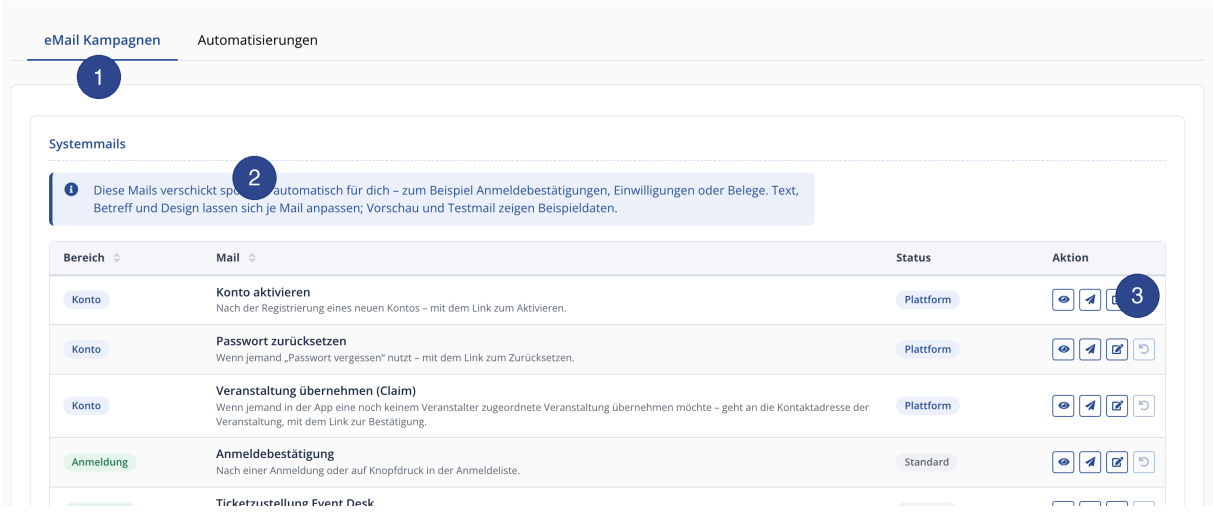
Email campaigns & automations

Customize system emails, send email campaigns to contacts and set up automatic mail rules.

Overview

Under **Contacts → Marketing** there are the tabs **Email campaigns** (with the system emails) and **Automations**. This covers your entire member communication: from automatic system emails through manual newsletters to time-triggered reminders. All emails use your logo and colours in a consistent layout.

System emails



1	Email campaigns and Automations tabs
2	System email list (area, email, status)
3	Actions: preview, test mail, edit, reset

Figure 53: System emails

spooorts sends these emails automatically (e.g. registration confirmations, consents, receipts). Text, subject and design can be customized per email; **Preview** and **Test mail**

show sample data, **Reset** restores the default template. Columns: area, email, status (platform/standard), action. The status Platform means the spooorts default template, Standard a version you have customized.

Email campaigns

In the **Email campaigns** tab you create a mail job and send it to your contacts – with an editor, placeholders and attachments. You choose the recipients via contact categories or individual contacts, create subject and content in the editor, insert placeholders such as the first name and see a preview before sending. Sent jobs are kept for tracking. In addition you see the send status and the number of recipients for each job.

Automations

Create rules that fire a mail job automatically by event or condition (e.g. 14/7/1 days before the event, before a class, on inactivity). Fields: Name, Trigger type, Sport, Offsets, Active. This way you reach participants automatically at the right time, without sending each email individually. An automation can be deactivated at any time without deleting it; the trigger type determines what the rule reacts to.

Data protection duties

Maintain data subject rights, consents, retention catalogue, data breaches and processors in one place. Not legal advice.

Overview

Besides the **data subject rights** (data access/export under Art. 15/20, anonymisation under Art. 17 – see data protection requests) you maintain under **Contacts** › **Data protection** four ongoing duties. This way spooorts bundles the recurring data protection tasks of a club in one place. The four tabs cover consents, retention, data breaches and processors. This is not legal advice.

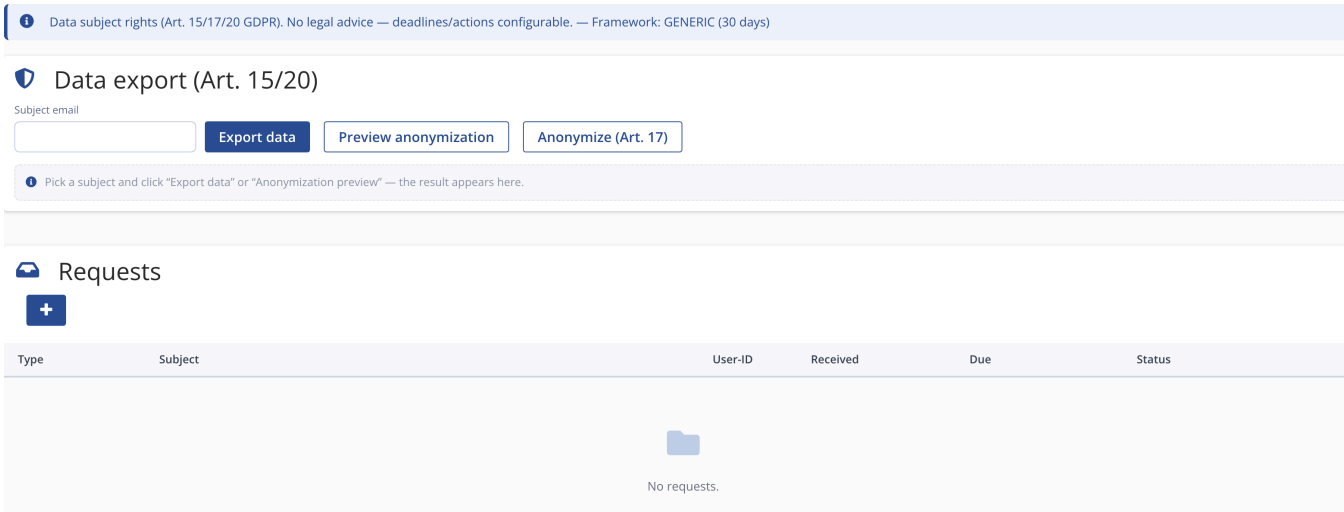


Figure 54: Data protection: subject rights and requests

Consents

You record and manage consents (e.g. for newsletters or photos) via **New consent**. Each consent can be withdrawn and is documented with a timestamp, so you can prove at any time what a member agreed to. Withdrawn consents are kept for evidence. When sending newsletters, spooorts takes into account whether a valid consent exists.

Retention catalogue

The retention catalogue records, per country, how long which data is kept. It is editable per club, so you can store your own periods. This is not legal advice – agree the periods with your data protection officer. Expired data is deleted or anonymised in a targeted way using the catalogue.

Data breaches

You record incidents (data breaches) with all key details. spooorts reminds you of the **72-hour deadline** to report to the supervisory authority and of notifying the data subjects in case of high risk (Art. 33/34 GDPR), so no deadline is missed. Each incident is kept with status and history and stays traceable.

Processors

In the processor register (Art. 28/44) you document your service providers with **DPA status** and the basis for third-country transfers (standard contractual clauses or adequacy decision). This keeps an overview of which providers process personal data on your behalf. A complete register must be presented in an audit by the supervisory authority.

Report Builder, tax periods & organisation

Build your own reports from data source, columns, filters and grouping; close tax periods and consolidate the tenants of an organisation.

Report Builder

Under **Analytics** › **Finance** › **Report Builder** you assemble your own reports, without programming. Choose a data source and set columns, period, filters and grouping as needed:

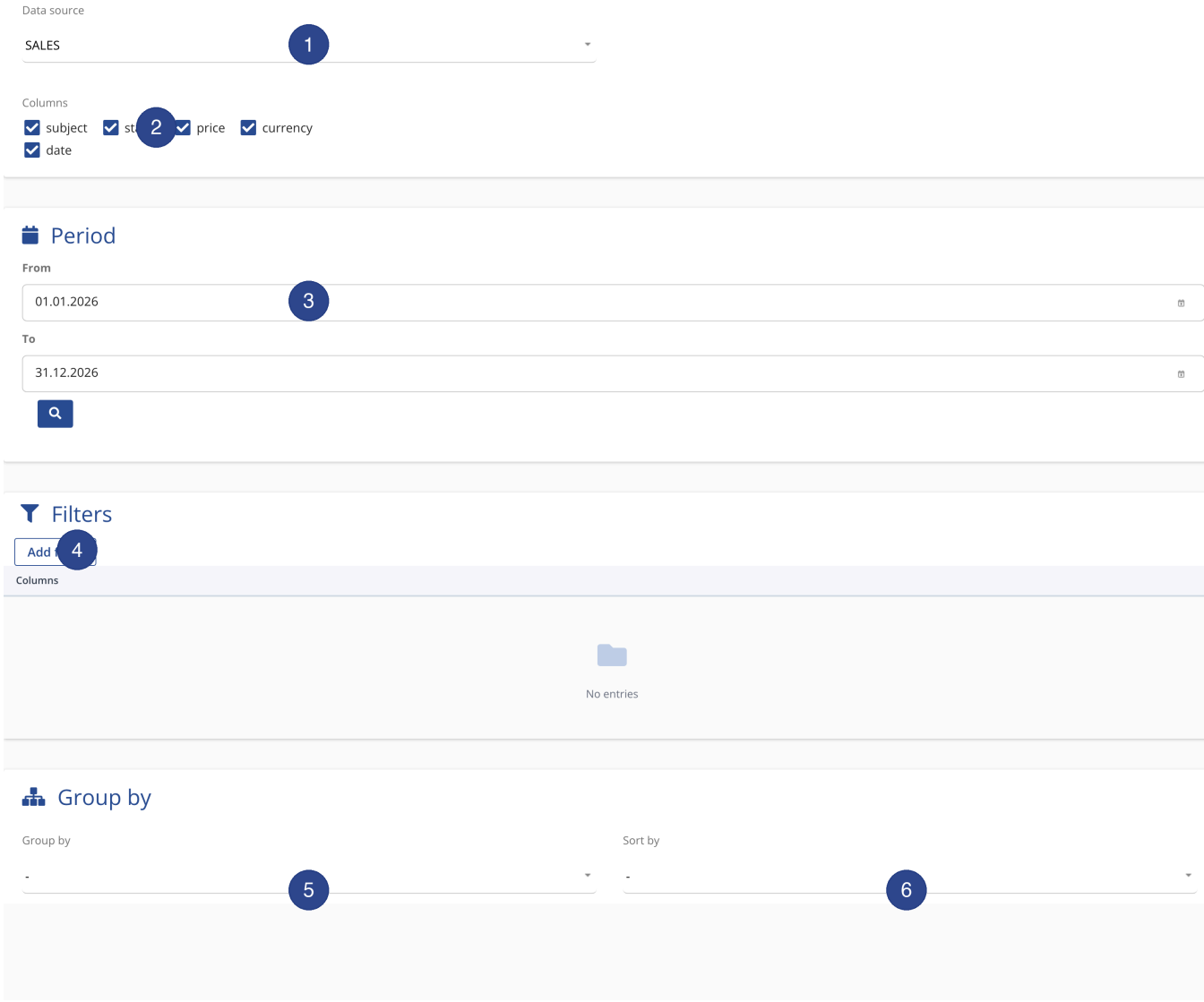


Figure 55: Report Builder with data source, period, filter and grouping

1 – Data source	Basis of the report, e.g. sales, registrations or fees.
2 – Columns	Fields that appear as columns in the report (tick to select or deselect).
3 – Period	From and to date of the reporting window.
4 – Filters	Use **Add filter** to set conditions per column (column, operator, value).
5 – Group by	Aggregates the rows by a field and sums them.
6 – Sort by	Field the results are sorted by.

Use **Preview / Download** to see the result and export it. With **Save** you store the report; **Saved reports** are permanently available. This way you create, for example, monthly revenue lists, participant overviews or fee reports exactly to your specification, without relying on prebuilt reports.

Tax period close

The **tax period close** freezes a billing period so that receipts can no longer be changed afterwards – the basis for clean bookkeeping. After the close, corrections land in the next open period. Typically you close monthly or quarterly periods after the tax return.

Organisation / franchise report

If your club belongs to an organisation (umbrella body, branch chain) with **consolidate=yes**, the **franchise report** consolidates the revenue and sales of the member tenants in real time. This lets you see the figures of all locations in one shared report. Individual tenants still see only their own data.

Health questions & liability waiver

Collect a health self-disclosure and let participants sign the liability waiver electronically.

Overview

As a registration question of the category *health self-disclosure* you ask whether health restrictions stand in the way of participation – the way studios and course providers collect it before the first session. The terms of participation and the liability waiver are signed electronically; the desk notes *liability waiver has been signed*. Health data is marked as a special consent category and treated with corresponding protection.

Setting up

You create the health question per event via the **registration questions** (menu **Events** > **Registration questions**, or the question-mark icon in the event list). Suitable question types are **yes/no** for the self-disclosure and **file upload** for a medical certificate.
The liability waiver is attached to the terms of participation and is confirmed during registration or at the desk. Without a signed waiver, participation stays blocked until it is provided.

Data protection

Because it is health data, it counts as a **special category of personal data**. The consent is recorded separately, can be withdrawn at any time and is traceable in the consent log. Grant access only to the people who really need it, and delete the information as soon as the purpose no longer applies.

Partner Program

Recommend spooorts and earn a commission from the service fee on every registration made through your partner code.

Overview

With the partner program you recommend spooorts – to your members, to other clubs and organizers, or via your own website – and earn a commission in return. It is based on the **service fee** that spooorts charges per registration: for every registration made through your personal partner code or partner link, you are credited a share. There are no extra costs for your members and participants.

Opening the partner program

You find the partner program in the Manager under **Contacts** › **Marketing** › **Partner program**.

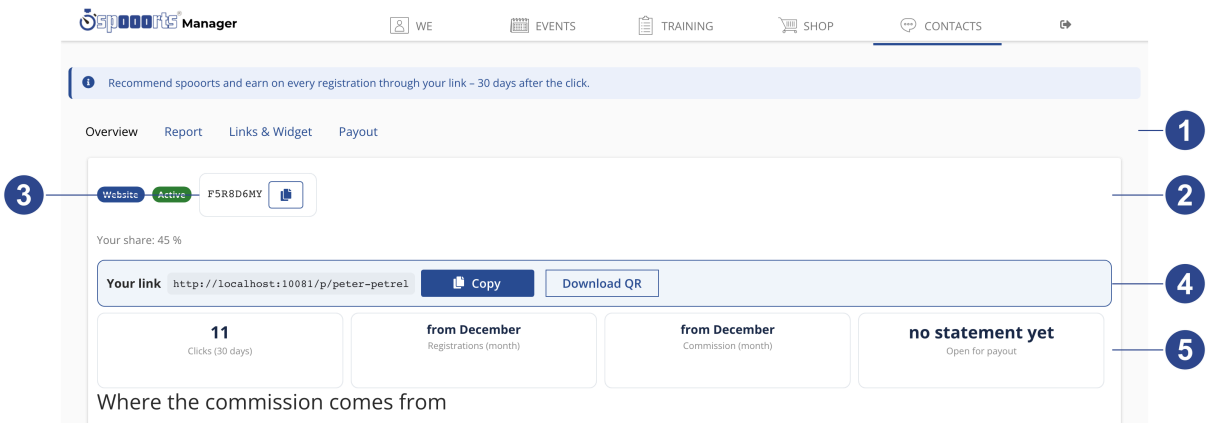


Figure 56: The partner dashboard

① Tabs	Four tabs guide you through the programme: Overview, Report (commission by day, event and source), Links & widget, and Payout.
② Partner type & status	Shows your partner type (e.g. website, club, timekeeper) and the status Pending, Active or Blocked. Just below it is your share of the service fee – 45 % in this example.
③ Partner code	Your fixed partner code (here F5R8D6MY). It stays assigned to you permanently; every registration via your code or link counts for 30 days after the click.
④ Partner link & QR	Your personal partner link with a copy button and a downloadable QR code – for your website, newsletter, app or posters.
⑤ Key figures	Clicks over the last 30 days, registrations and commission for the current month, and

	the amount open for payout. Payout starts at 25 €.

How to join

Once activated, you receive a personal **partner code** as well as **partner links** and **QR codes** that you place on your website, in newsletters, in the app or on printed notices. Every registration made through them is assigned to your account automatically – anonymously, without any personal data of the participants being passed on to you.

How to become a partner:

1. Open the **Overview** tab and click **Become a partner**.
2. Choose your partner type: website, portal, club, studio, timekeeper, agency or federation.
3. Accept the terms.
4. You immediately receive a fixed partner code and your partner link; share it as a link or QR code.

Key fields

Partner type	Website, portal, club, studio, timekeeper, agency or federation – it determines what you earn commission on.
Partner code	Your fixed code; it stays assigned to you permanently.
Status	Pending, Active or Blocked.
Your share	Your share of the service fee, as shown by the dashboard.
Your link	Your personal partner link with a copy button and QR code.
Widget builder	Ready-made widget code to embed regional events on your website.

Commission & payout

The commission depends on the partner type. For **websites** and **portals** you earn up to 30 % of the service fee per registration via your link. **Clubs** and **studios** receive a share of the bookings of their linked members; **timekeepers** and **agencies** a share of the registrations for the events they handle, and **federations** a share of the dues of their member clubs. Your actual share is shown in the dashboard under “Your share”. The current month's figures are provisional; cancellations are deducted until the end of the month. The first statement arrives on the 3rd of the following month; payout is made from €25.

More information

You can find all details on partner types, terms and registration at spooorts.market/partner.

To learn how to record incoming and outgoing sponsoring contracts, see Sponsoring.

Legal Notice

Legal information about the provider of this documentation pursuant to § 5 DDG (German Digital Services Act).

Provider

You maintain the legal-notice details under **We** › **About us** › **Profile**.

(IT)² Interactive GmbH
Joseph-von-Fraunhofer Str. 20
44227 Dortmund
Germany

Every coach website operated via spooorts needs its own, complete legal notice with name and address, authorised representative and contact details. You maintain the details centrally in the organisation profile; they then appear automatically on website and app. The complete legal information about the platform itself is found in the legal notice on the spooorts website.

Contact

Email: info@it2in.de

Commercial Register

For further mandatory legal information, please refer to the full legal notice at legals.gofo.rest.

Liability Notice

The contents of this documentation have been compiled with the utmost care. However, we cannot accept responsibility for the accuracy, completeness, or currency of the information provided. As a service provider we are responsible for our own content in accordance with § 7 para. 1 TMG. External links were checked for possible violations of law at the time of linking; ongoing monitoring of linked pages is not feasible without specific indications of a violation.

Photos

The photo gallery is where you manage the pictures your organisation shows: upload new photos and remove ones you no longer need.

What is the photo gallery for?

You will find this page in the menu under **We** › **About us** › **Photos**.

The gallery collects your organisation's photos. Every uploaded image appears as a tile. To open the page you need access to the **About us** (profile) area.

The screen at a glance



Figure 57: The photo gallery with the upload area and tiles

① **Upload photos**	Use **Upload photos** to add new images. Drag the files into the area or select them. Allowed formats are GIF, JPG and PNG up to 10 MB per file; you can select several images at once. Uploaded photos appear in the gallery straight away.
② **A photo in the gallery**	Every photo is shown as a tile, so you can see at a glance which images are stored.
③ **Delete a photo**	Use the × symbol on the tile to delete a photo. spooorts asks first (*Do you really want to delete the photo?*); the image is removed only after you confirm.

Step by step: upload a photo

1. Open **We** > **About us** > **Photos**.
2. Click **Upload photos** and select one or more images – or drag them into the upload area.
3. The photos are uploaded and appear as tiles in the gallery.

Delete a photo

On the photo in question, click the **×** (**Delete**) and confirm the prompt. The photo is then removed from the gallery.

> **Tip:** Use good-quality photos in GIF, JPG or PNG format. Each file may be up to 10 MB.

Goods receipt

Goods receipt is where you manage the deliveries for your inventory: you create a delivery, record its status and see the order and delivery dates at a glance.

What is goods receipt for?

You will find this page in the menu under **Shop** > **Stock** > **Goods receipt**.

Goods receipt is where you manage the **Deliveries** for your inventory. A delivery is an order or delivery document; stock is booked via the goods receipt of an order. To assign quantities to a delivery, **Products** must already exist in the shop. To open the page you need access to the shop area.

The screen at a glance

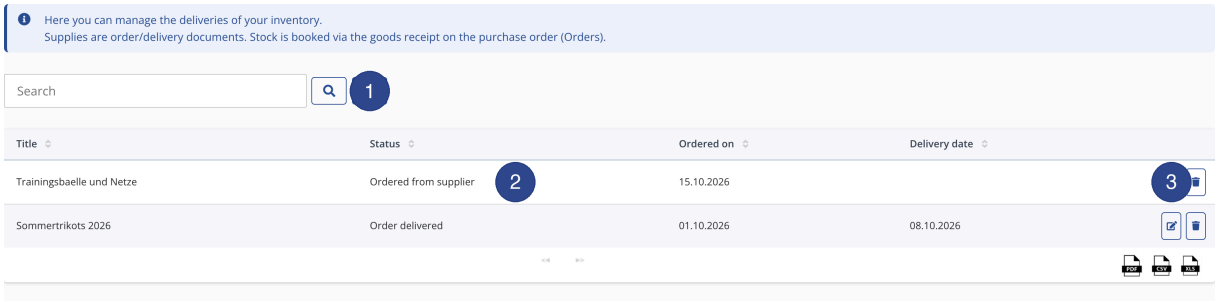


Figure 58: The delivery list with search, add button and status

① **Add delivery**	Use the **+** button (**Add delivery**) to open the dialog where you create a new delivery.
② **Status of a delivery**	The **Status** column shows where the delivery stands: **Ordered from supplier** or **Order delivered**. Next to it you see **Ordered on** and **Delivery date**.
③ **Edit or delete a row**	At the end of the row the pencil icon opens the delivery for editing, the bin icon deletes it.

Step by step: create a delivery

1. Open **Shop** > **Stock** > **Goods receipt**.
2. Click **+** (**Add delivery**).
3. On the **Goods receipt** tab, fill in the fields: **Name**, **Ordered on**, **Delivery date**, **Status** and, if needed, **Remarks**.
4. On the **Products** tab, assign the delivered products and quantities to the delivery; this books the stock.
5. Click **Save**. The delivery then appears in the list.

Edit or delete a delivery

Use the **pencil** icon at the end of the row to reopen and change a delivery; the **bin** icon removes it from the list.

> **Tip:** If you have many deliveries, use the **Search** field above the list to filter by name.

Subsidies

On the Subsidies page you manage grant applications and subsidies with source, program, amount and status.

What is the Subsidies page for?

You will find this page in the menu under **We** › **Finance** › **Expenses & payouts** › **Subsidies**.

Here you manage grant applications and subsidies with source, program, amount and status. Each row shows **Application date**, **Source**, **Program**, **Amount**, **Status** and **Actions**. The status runs **Applied** → **Granted** → **Received**. To open the page you need access to the finance or payment area.

The screen at a glance

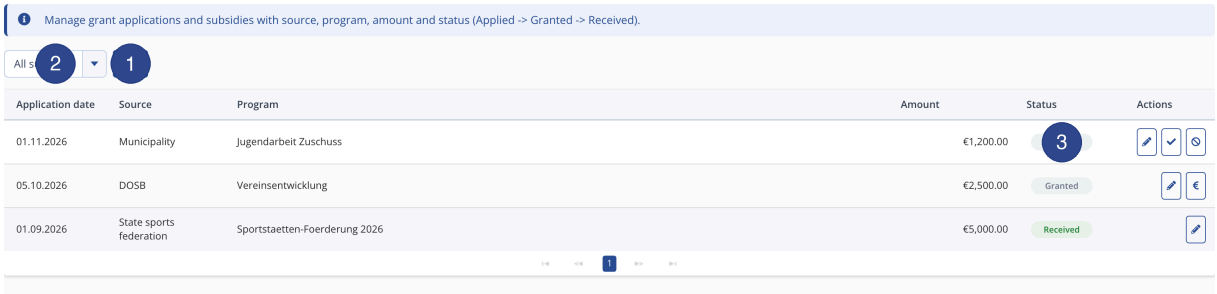


Figure 59: The subsidy list with button, status filter and status column

① **New subsidy**	Use the **New subsidy** button to open a dialog where you add a subsidy.
② **Status filter**	The **All subsidies** dropdown filters the list by status.
③ **Status column**	The badge in the **Status** column shows where a subsidy stands: **Applied**, **Granted**, **Received** or **Rejected**.

Step by step: add a subsidy

1. Open **We** › **Finance** › **Expenses & payouts** › **Subsidies**.
2. Click **New subsidy**.
3. In the dialog, fill in the fields: **Source**, **Program**, **Application date**, **Amount** and **Purpose**; if needed, **Note**.
4. Click **Save**. The subsidy then appears in the list.

Status of a subsidy

> **Tip:** The status can later move from **Applied** to **Granted** and finally to **Received** via the **Actions** in the row.

Account and balance

In Account and balance you pick a team, training group or relay and manage its money across seven tabs.

What is Account and balance for?

You will find this page in the menu under **We** › **Finance** › **Income & invoicing** › **Account and balance**.

Account and balance is the team or member account. At the top you pick a **Team**, training group or relay and then manage its money across seven tabs. To open the page you need finance or cashier access; in addition, at least one team must exist, otherwise you create one first.

The screen at a glance

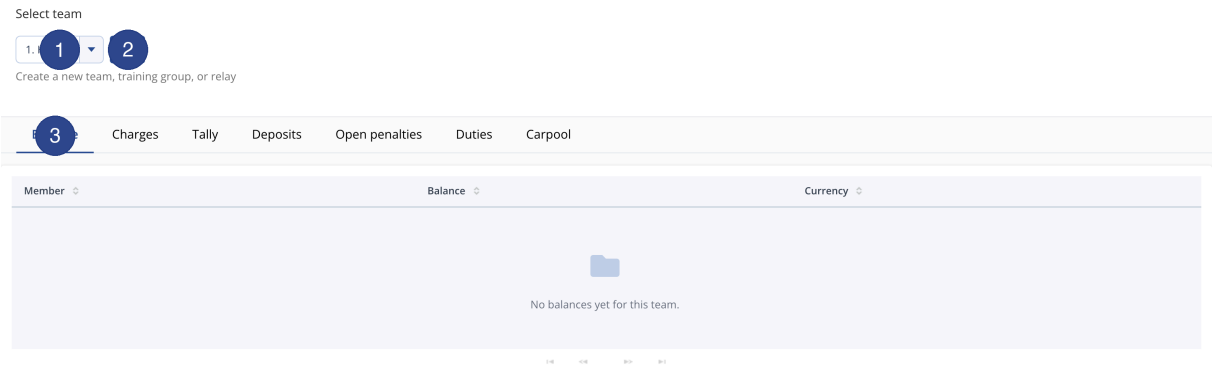


Figure 60: The account with team picker, button and tabs

① Select team	The **Select team** dropdown at the top determines which team, training group or relay the account shows.
② New team	The **New team** button opens a dialog for creating one (**Create a new team, training group, or relay**).
③ Page tabs	The tab row leads through the topics: **Balance**, **Charges**, **Tally**, **Deposits**, **Open penalties**, **Duties** and **Carpool**.

Step by step: run the account

1. Open **We** › **Finance** › **Income & invoicing** › **Account and balance**.

2. Pick a team at the top via **Select team**. If there is none yet, click **New team**, fill in **Name**, **Short code** and **Kind** (**Team**, **Training group** or **Relay**) and click **Save**.
3. Then work through the seven tabs.

Balance	The tab with the current balance of the selected team.
Charges	The tab for the charges split across the members.
Tally	The tab with a tally list for counting.
Deposits	The tab for the deposits received.
Open penalties	The tab with the penalties still open.
Duties	The tab for the team's duties.
Carpool	The tab for the team's carpools.

Good to know

> **Tip:** The **Balance** tab stays empty until there are ledger entries.

Bookkeeping export

In the bookkeeping export you generate a bookkeeping file in a chosen format for a date range and upload it yourself to the relevant portal or accounting tool.

What is the bookkeeping export for?

You will find this page in the menu under **We** › **Finance** › **Accounting** › **Bookkeeping export**.

Here you generate a bookkeeping file in a chosen format (DATEV, FEC, FatturaPA, MTD, QuickBooks, Xero, Sage or Generic CSV) for a date range. You then upload the file yourself to the relevant authority portal or in your accounting tool. To open the page you need access to the finance or payment area; for the file to have content, there must be paid sales in the range.

The screen at a glance



Figure 61: The export screen with date range, format and export button

① **Period from**	Use the **Period from** date picker to set the start of the range. You set the end date next to it under **Period to**.
② **Format**	The **Format** dropdown determines the format in which the file is generated. For **DATEV** you also choose the **Chart of accounts (DATEV)**.
③ **Export bookkeeping**	The **Export bookkeeping** button generates the file and downloads it.

Step by step: create an export

1. Open **We** › **Finance** › **Accounting** › **Bookkeeping export**.
2. Set **Period from** and **Period to**.
3. Choose the **Format**; for **DATEV** also the **Chart of accounts (DATEV)**.
4. Click **Export bookkeeping**. The file is generated and downloads; then upload it yourself to the relevant portal or in your accounting tool.

Note on the date range

> **Tip:** A wider date range includes more bookings; a range with no paid sales yields no file.

Budget planning

In budget planning you set one planned amount per expense category for each fiscal year – the basis for the later plan-vs-actual comparison.

What is budget planning for?

You will find this page in the menu under **We** › **Finance** › **Budget planning**.

In budget planning you plan an amount per expense category – for each **Fiscal year** and for the chosen **Section**. This plan is the basis for the later plan-vs-actual comparison. To open the page you need access to the finance or payment area.

The screen at a glance

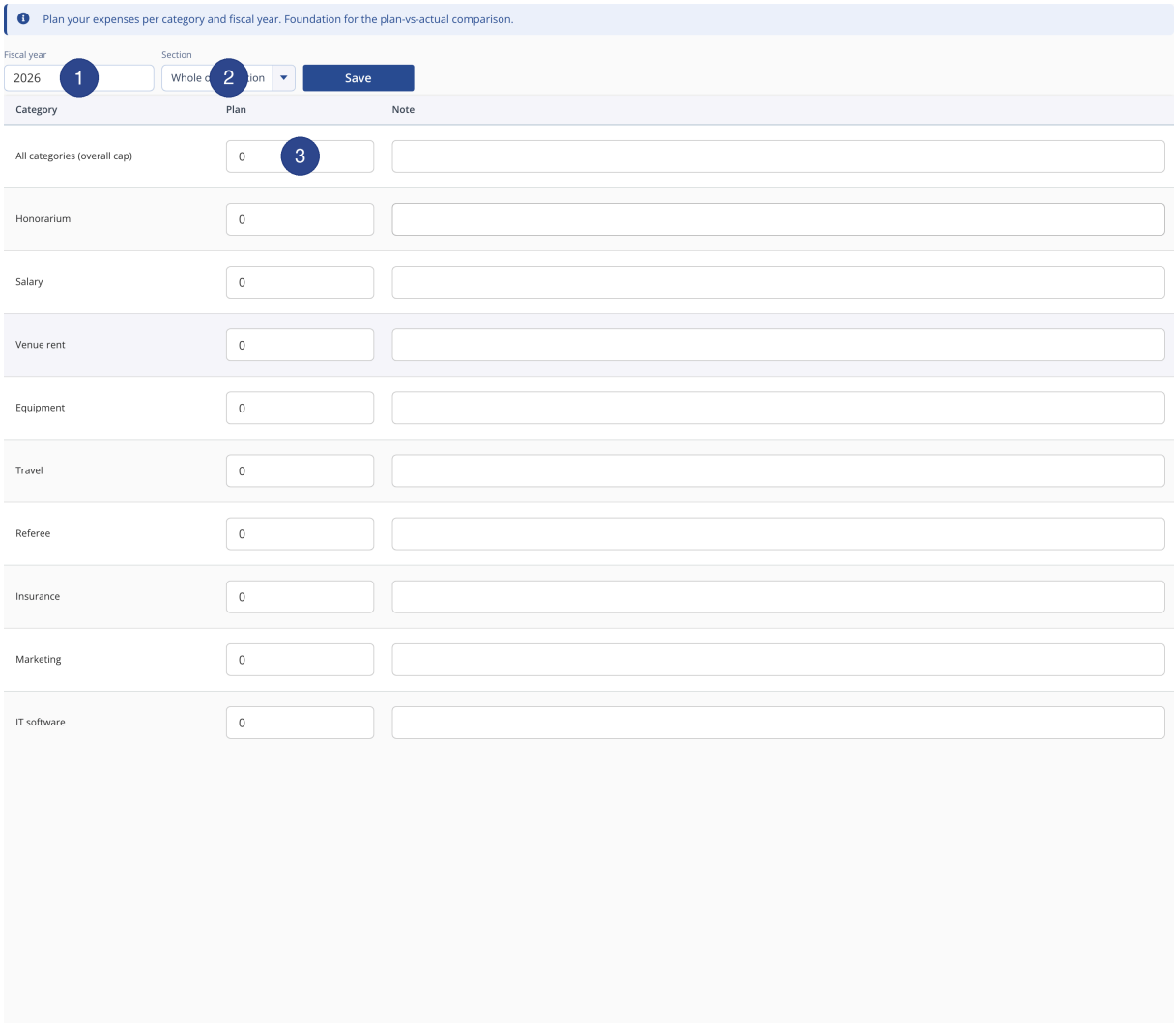


Figure 62: Budget planning with fiscal year, section and the plan column

① Fiscal year	Use the **Fiscal year** field to choose which year you are planning the budget for.
② Section	The **Section** dropdown sets the scope. With the **Whole organization** option you plan for the entire organization instead of a single section.
③ Plan column	In the **Plan** column you enter the planned amount per **Category** – one row per category.

Step by step: plan a budget

1. Open **We** > **Finance** > **Budget planning**.
2. Choose the **Fiscal year**.
3. Choose the **Section**; for the entire organization pick **Whole organization**.
4. In the **Plan** column, enter the planned amount per **Category**, and a **Note** if needed.
5. Click **Save**.

Good to know

Besides the individual categories, you can set an overall planned value via **All categories (overall cap)**.

> **Tip:** Use the **Note** column to record how a planned amount was derived – this helps with the later plan-vs-actual comparison.

P&L / Balance

P&L / Balance shows a general-ledger statement: profit-and-loss accounts form the P&L, balance accounts the balance-sheet movement.

What is P&L / Balance for?

You will find this page in the menu under **We** > **Finance** > **Reports** > **P&L / Balance**.

P&L / Balance is a read-only view: profit-and-loss accounts form the **Profit and loss**, balance accounts the balance-sheet movement. Optionally you restrict the statement to a period range (format YYYYMM). To open the page you need access to the finance or payment area; figures appear only when posted journal entries exist. This screen only displays; it has no create or save.

The screen at a glance

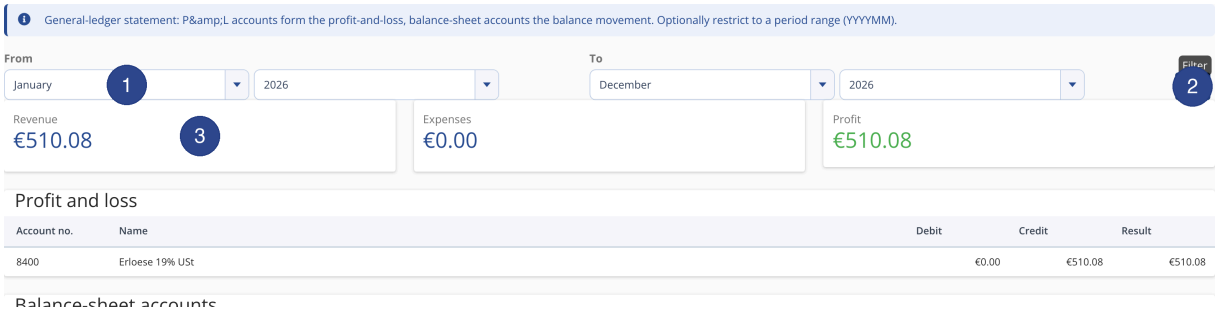


Figure 63: P&L / Balance with period selects, Filter button and result cards

① **Period**	Use the **From** selects (month and year) to set the start of the period; next to them, **To** sets the end.
② **Filter**	The **Filter** button applies the chosen period.
③ **Result cards**	The cards show the key figures: **Revenue**, **Expenses** and, depending on the balance, **Profit** or **Loss**.

Restrict the period

By default the current year is shown. In **From** and **To** choose a month and year each and click **Filter** to limit the period.

The **Profit and loss** table lists the accounts with **Account no.**, **Name**, **Debit**, **Credit** and **Result**. The **Balance-sheet accounts** table shows the balance accounts.

> **Tip:** This view is read-only and reflects the posted state of the general ledger.

Approval inbox

The approval inbox shows every item waiting for approval so you can approve or reject them one by one or in bulk.

What is the approval inbox for?

You will find this page in the menu under **We** › **Finance** › **Approval inbox**.

The approval inbox gathers every item waiting for approval into a single list: **Expenses** and honorarium statements in **Draft** status and subsidies in **Requested** status. You approve or reject entries one by one or in bulk. In addition, you can set an **Automatic approval threshold**. To open the page you need access to the finance or payment area.

The screen at a glance

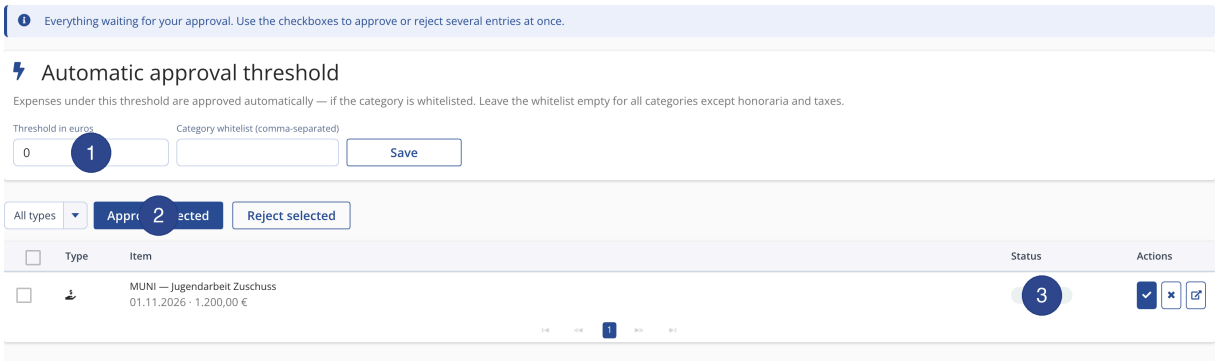


Figure 64: The approval inbox with threshold, bulk actions and item list

① Threshold in euros	In the **Automatic approval threshold** card, the **Threshold in euros** field sets the amount up to which items are approved automatically.
② Approve selected	The **Approve selected** button approves all ticked entries at once; next to it is **Reject selected**.
③ Item with status	Each row in the list shows **Type**, **Item** and a **Status** badge; the **Actions** sit at the end of the row.

Step by step: approve items

1. Open **We** › **Finance** › **Approval inbox**.

2. Narrow the list with the filters if needed: **All types**, **Expenses only**, **Honoraria only** or **Subsidies only**.
3. Tick the entries you want and click **Approve selected** or **Reject selected**.
4. Alternatively, use the **Approve**, **Reject** or **Open** actions at the end of a row for a single item.

Automatic approval threshold

In the **Automatic approval threshold** card you enter a **Threshold in euros** and, optionally, a **Category whitelist (comma-separated)**. Click **Save** to apply the setting. Items below the threshold – and, if set, in the whitelist – are then approved automatically.

> **Tip:** Use the **Expenses only**, **Honoraria only** and **Subsidies only** filters to work through one item type at a time in a full inbox.

Qualifications

In Qualifications you maintain a catalog of qualification categories and assign qualifications to trainers with a level and an expiry date.

What are Qualifications for?

You will find this page in the menu under **Training** › **Trainers** › **Qualifications**.

On this page you maintain a **Qualification catalog** of categories and assign qualifications to trainers (category, level, expiry). To open the page you need access to the training or calendar area.

The screen at a glance

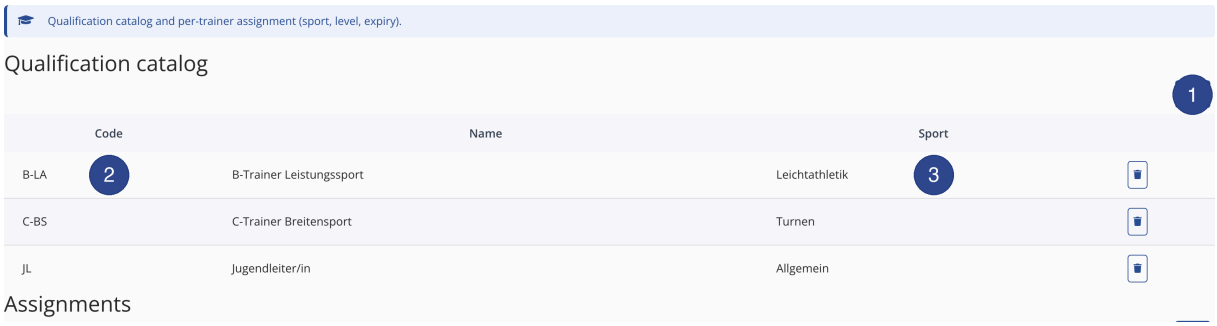


Figure 65: The qualification catalog with the Code, Name and Sport columns

① **New category**	Use the **New category** button to create a new catalog category.
② **Code column**	The **Code** column shows the short code of a catalog row.

③ **Sport column**	The **Sport** column shows the sport assigned to the row; between them sits the **Name** column.

Maintain the catalog

1. Click **New category**.
2. Fill in **Code**, **Name** and **Sport**.
3. Click **Save**. The category then appears as a row in the catalog.

Assignments

Below the catalog, in the **Assignments** area, you assign a qualification to a trainer. Via **New assignment** you choose a **Trainers** entry, a **Level** and a **Valid until** date; if needed, you add a **Note**.

> **Tip:** This requires at least one trainer to exist. The list of assignments is empty at first; use **Delete** to remove an existing assignment again.

Structure

In Structure you build your organisation's tree: you drag levels such as organisation, region, location, department and team together into a tree.

What is Structure for?

You will find this page in the menu under **We** › **Settings** › **Structure**.

Here you model how your organisation is built, as a tree. You drag levels from the palette onto a node (dropped onto a node it becomes a sub-level), move nodes by dragging, and rename them by clicking the name – or start from a template. To open the page you need access to your organisation's settings.

The screen at a glance

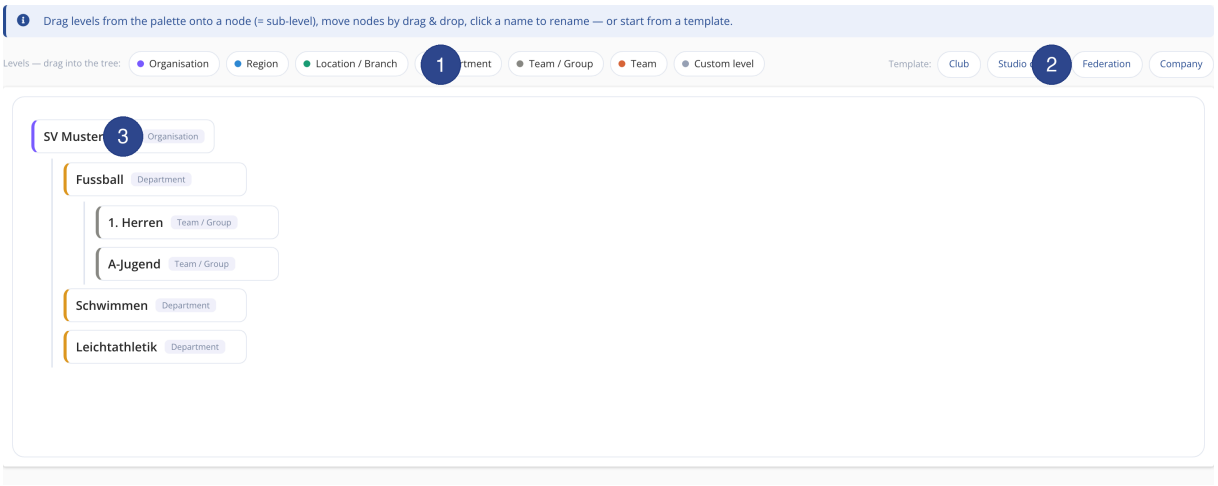


Figure 66: The structure editor with the level palette, templates and the tree

① Level palette	Under **Levels — drag into the tree:** the building blocks are ready: **Organisation**, **Region**, **Location / Branch**, **Department**, **Team / Group**, **Team** and **Custom level**. Drag a block into the tree.
② Templates	With **Template:** you start from a ready-made structure – **Club**, **Studio chain**, **Federation** or **Company**. A template replaces the current tree (after a confirmation).
③ A node in the tree	Each node shows its name and, to its right, the level (e.g. **Organisation** or **Department**). Click the name to rename it; using the icons on the node you add a sub-level (the plus) or delete it (the cross). On an **Organisation** the gear opens the group settings.

Step by step: build the structure

1. Open **We** > **Settings** > **Structure**.
2. Drag a level from the palette into the tree. Drop it onto an existing node to create a **sub-level**.
3. Click a node's name and type the name you want.
4. Drag nodes to the right place; use the cross to remove a node.

> **Tip:** Changes are saved automatically; there is no separate save button. Instead of starting by hand, you can load a fitting structure via **Template:** and then adjust it.

Account mapping

Account mapping links products, categories, fees and plans to a revenue account and a tax account for bookkeeping.

What is account mapping for?

You will find this page in the menu under **We** > **Finance** > **Accounting** > **Account mapping**.

Here you map each **Product**, **Category**, **Fee** and **Plan** to a **Revenue account** and a **Tax account** for bookkeeping. When posting, the most specific mapping applies: product before category before fee/plan before default. A **Default** mapping always exists. To open the page you need access to the finance or payment area.

The screen at a glance

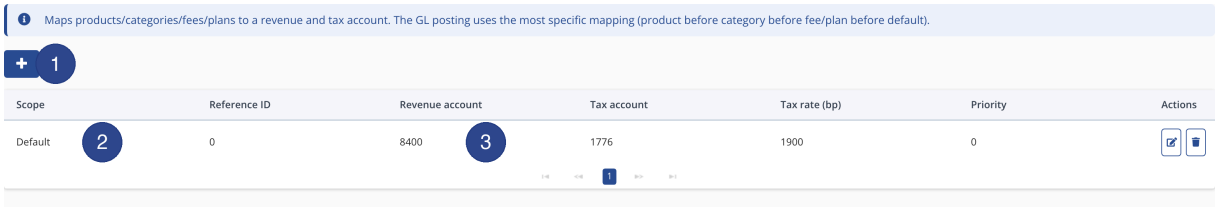


Figure 67: The mapping list with the button, scope and revenue account

① **New mapping**	Use the **New mapping** button to open the dialog where you create a new mapping.
② **Scope column**	The **Scope** column shows which area the row applies to, for example **Default**, **Product**, **Category**, **Fee** or **Plan**.
③ **Revenue account column**	The **Revenue account** column shows the stored account number, such as 8400.

Step by step: create a mapping

1. Open **We** > **Finance** > **Accounting** > **Account mapping**.
2. Click **New mapping**.
3. In the dialog choose the **Scope** (**Product**, **Category**, **Fee** or **Plan**) and the matching **Reference ID**.
4. Enter **Revenue account**, **Tax account**, **Tax rate (bp)** and **Priority**.
5. Click **Save**. The mapping then appears in the list.

Good to know

> **Tip:** A **Default** mapping always applies whenever no more specific mapping matches.

Lifecycle

The lifecycle is a cockpit for rules around memberships: automatic age transitions plus due renewals and expiries.

What is the lifecycle for?

You will find this page in the menu under **Contacts** › **Memberships** › **Lifecycle**.

The lifecycle is a cockpit for rules around the member lifecycle, for example automatic age transitions between fee groups or sections, plus due membership renewals and expiries. With **Refresh** you see a preview of what is due (without any change); with **Apply now** you carry the changes out. To open the page you need access to the finance or payment area (contacts/memberships).

The screen at a glance

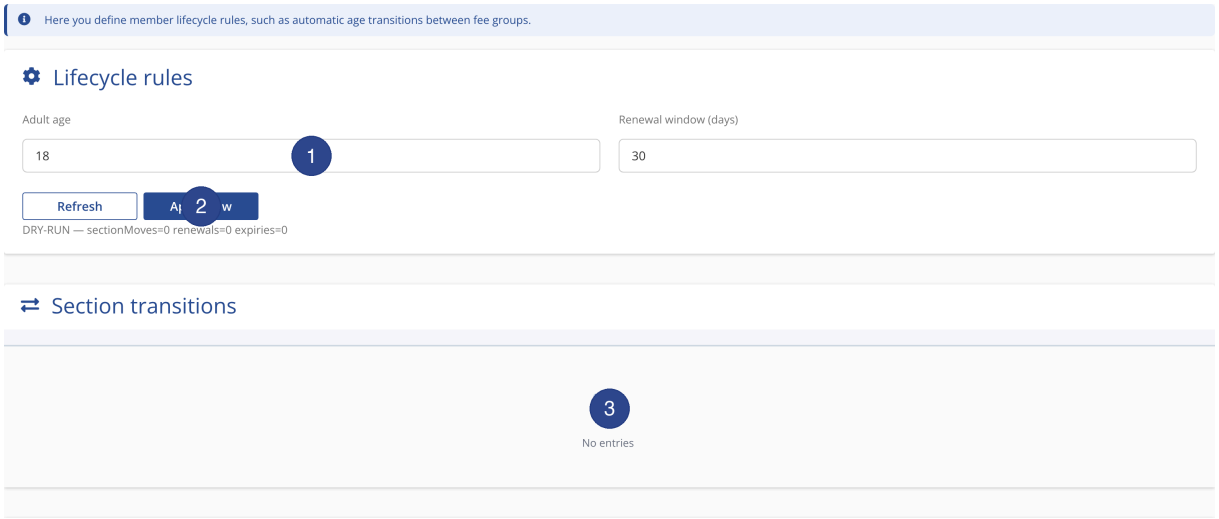


Figure 68: The cockpit with the rules, Refresh and the three result tables

① **Adult age**	In the **Lifecycle rules** card you set in the **Adult age** field the age from which a member counts as an adult.
② **Apply now**	Use the **Apply now** button to actually carry out the changes shown earlier in the preview.
③ **Section transitions table**	The **Section transitions** table is where due section transitions would be listed. In the example shown it is empty, because nothing is currently due.

Step by step

1. Open **Contacts** › **Memberships** › **Lifecycle**.
2. In the **Lifecycle rules** card set the **Adult age** and the **Renewal window (days)**.
3. Click **Refresh** to preview what is due; the three tables then fill.

4. Check the **Section transitions**, **Renewals** and **Expiries** tables.
5. Click **Apply now** to carry the changes out.

Good to know

> **Tip:** **Refresh** is only a preview and changes nothing. Only **Apply now** carries the changes out.

France — Chorus Pro / PPF

On this page you enter the credentials for Factur-X transmission through the French Chorus Pro / PPF portal.

What is the FR configuration for?

You find this page in the menu under **We** > **Finance** > **Income & invoicing** > **FR configuration (Chorus)**. It appears under **Finance** only once an operating location (Standort) in France has been set up.

Here you configure the transmission of Factur-X e-invoices through the French Chorus Pro / PPF portal (PISTE OAuth2). The setup is identified by a SIREN. A French operating location is required; without it the menu entry does not appear.

The screen at a glance

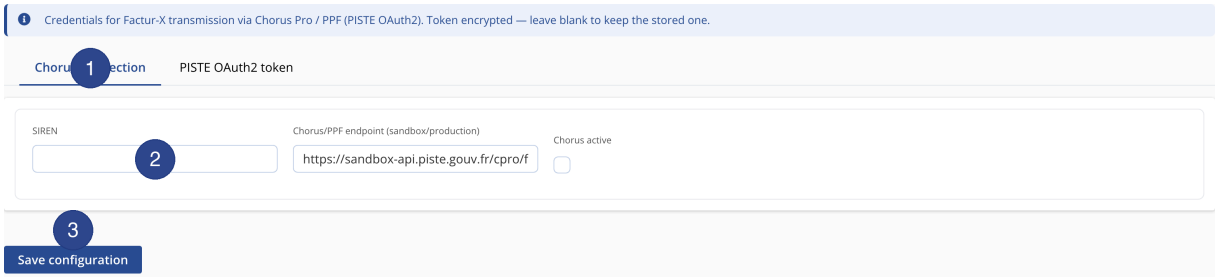


Figure 69: The FR configuration with its tab, SIREN field and Save button

① Chorus connection tab	The first tab **Chorus connection** groups the connection data for the portal.
② SIREN field	The **SIREN** field holds the French company identifier by which the setup is identified.
③ Save configuration button	The **Save configuration** button stores your entries.

The configuration fields

The **Chorus connection** tab contains the connection fields: **SIREN** (French company identifier), **Chorus/PPF endpoint (sandbox/production)** (address of the target portal) and the **Chorus active** checkbox, which switches the connection on or off.

The **PISTE OAuth2 token** tab contains the **PISTE OAuth2 token** field for the encrypted access token; per the hint shown in the mask it can be left blank to keep the token already stored.

> **Tip:** Factur-X, Chorus Pro, PPF and PISTE are the official French names and are kept unchanged in the mask.

USA — Sales Tax / 1099

On this page you enter the EIN and nexus states as well as a source for combined sales-tax rates for the USA.

What is the US configuration for?

You find this page in the menu under **We** › **Finance** › **Income & invoicing** › **US configuration (sales tax)**. It appears under **Finance** only once an operating location (Standort) in the USA has been set up.

Here you configure the collection of US sales tax (and 1099): the EIN and the states you have nexus in, plus a source for the combined rate – a tax provider (such as Avalara or TaxJar) or an internal REST endpoint and/or a local override of the combined rates. Per the hint there is no VAT; sales tax is computed per state. A US operating location is required.

The screen at a glance

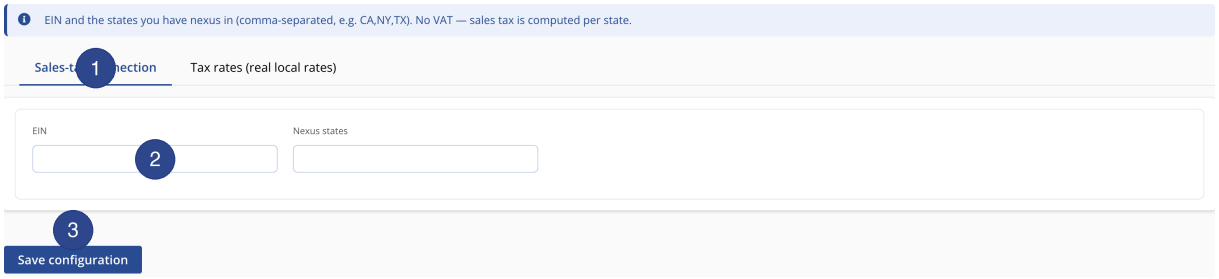


Figure 70: The US configuration with its tab, EIN field and Save button

① **Sales-tax connection tab**	The first tab **Sales-tax connection** groups the connection data for the sales-tax source.
② **EIN field**	The **EIN** field holds the US employer / tax identification number.
③ **Save configuration button**	The **Save configuration** button stores your entries.

The configuration fields

The **Sales-tax connection** tab contains: **EIN** (US employer / tax identification number), **Nexus states** (comma-separated list of the states with nexus), **Tax-provider endpoint**

(REST) (address of a tax provider or internal endpoint), **Provider API key** (its key) and the **Provider enabled** checkbox, which switches the provider lookup on or off.

The **Tax rates (real local rates)** tab contains the **Local rates (e.g. CA=9.125,WA=10.25)** field for manually maintained combined rates per state.

> **Tip:** Sales Tax, 1099, EIN and Nexus are the official US terms and are kept unchanged in the mask.

Italy — providers & configuration (FatturaPA)

This page gathers the configuration for electronic invoicing through the Italian Sistema di Interscambio (SdI): seller identity, transmission channel and retention.

What is the Italy configuration for?

You find this page in the menu under **We** > **Finance** > **Income & invoicing** > **Italy configuration**. The page appears under **Finance** only once an operating location in Italy has been set up (the menu entry is country-gated).

Here you configure FatturaPA invoicing through the SdI (Sistema di Interscambio): seller identity, SdI transmission channel, Conservazione (substitute retention) and an RFC-3161 time-stamp authority. It requires an operating location in Italy.

The screen at a glance

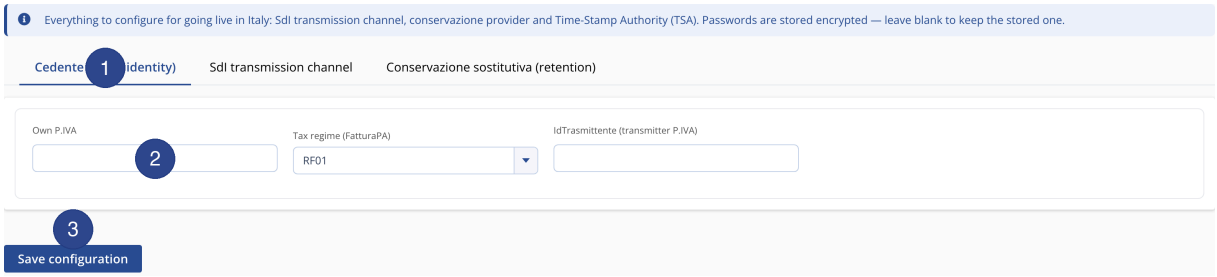


Figure 71: The three tabs of the Italy configuration: seller identity, transmission channel and retention

① Cedente (seller identity)	The first tab **Cedente (seller identity)** is active when the screen opens.
② Own P.IVA	**Own P.IVA** is the field for the business's own tax identifier.
③ Save configuration	The **Save configuration** button (label below) saves the configuration.

The tabs and fields

The configuration is organised in three tabs.

The **Cedente (seller identity)** tab holds the seller identity. **Own P.IVA** is the business's own Italian VAT identifier (Partita IVA). **Tax regime (FatturaPA)** holds the FatturaPA regime code chosen from a drop-down; the list shows the official code, for example RF01.

The **SdI transmission channel** tab defines how invoices reach the Sistema di Interscambio (SdI): **IdTrasmittente (transmitter P.IVA)** names the transmitter, **Channel** selects the transmission mode, **Endpoint / server URL** is the server address and **PEC mailbox (sender)** is the PEC sender address.

The **Conservazione sostitutiva (retention)** tab covers substitute retention: **Mode** selects the retention mode and **TSA URL (timestamp, RFC-3161)** is the address of the RFC-3161 time-stamp authority.

Password and secret fields show **(stored)** when a value is already saved; leaving them blank keeps the stored value.

> **Tip:** Leaving password and secret fields blank leaves the already stored value unchanged.

UK — Making Tax Digital (HMRC)

This page gathers the credentials for digital VAT-return filing to HMRC under Making Tax Digital (MTD).

What is the UK configuration (MTD) for?

You find this page in the menu under **We** > **Finance** > **Income & invoicing** > **UK configuration (MTD)**. The page appears under **Finance** only once an operating location in the United Kingdom has been set up (the menu entry is country-gated).

Here you configure digital VAT-return filing to HMRC under Making Tax Digital (MTD): VRN, HMRC API endpoint, OAuth2 credentials and the fraud-prevention headers HMRC requires. It requires an operating location in the United Kingdom.

The screen at a glance



Figure 72: The three tabs of the UK configuration: MTD connection, OAuth2 and fraud-prevention headers

① **MTD connection**	The first tab **MTD connection** is active when the screen opens.
② **VAT number (VRN)**	**VAT number (VRN)** is the field for the business's own tax identifier.
③ **Save configuration**	The **Save configuration** button (label below) saves the configuration.

The tabs and fields

The configuration is organised in three tabs.

The **MTD connection** tab holds the filing connection: **VAT number (VRN)** is the VAT registration number, **HMRC endpoint (sandbox/production)** selects the HMRC API address and **MTD active** switches the connection on or off.

The **OAuth2 (HMRC token refresh)** tab holds the API credentials: **Client ID**, **Client secret**, **OAuth2 token**, **Refresh token** and **Token endpoint URL**.

The **Fraud-prevention headers (HMRC required)** tab holds the values HMRC requires in its fraud-prevention headers: **Product name**, **Connection method** and **Device ID**.

The token field is stored encrypted; leaving it blank keeps the stored value.

> **Tip:** Leaving password and secret fields blank leaves the already stored value unchanged.

Spain — AEAT / SII

This page gathers the configuration for near-real-time VAT reporting to the Spanish AEAT via SII, Verifactu and TicketBAI.

What is the ES configuration (SII) for?

You find this page in the menu under **We** > **Finance** > **Income & invoicing** > **ES configuration (SII)**. The page appears under **Finance** only once an operating location in Spain has been set up (the menu entry is country-gated).

Here you configure near-real-time VAT reporting to the AEAT via SII (Suministro Inmediato de Información), plus Verifactu and (Basque) TicketBAI, using a qualified mTLS client certificate. It requires an operating location in Spain.

The screen at a glance

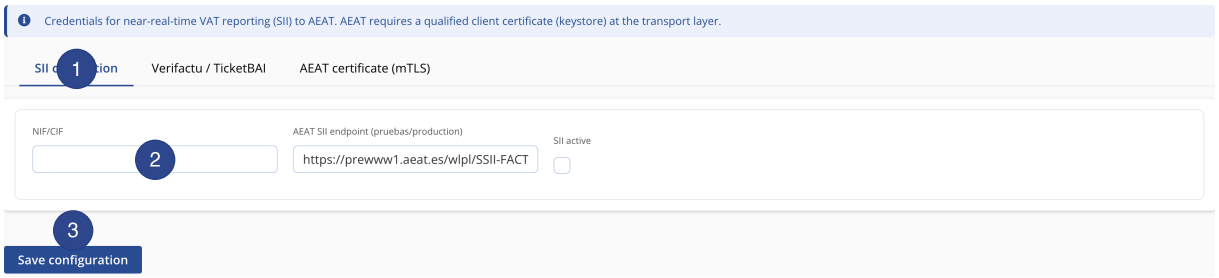


Figure 73: The three tabs of the ES configuration: SII connection, Verifactu/TicketBAI and AEAT certificate

① **SII connection**	The first tab **SII connection** is active when the screen opens.
② **NIF/CIF**	**NIF/CIF** is the field for the business's own tax identifier.
③ **Save configuration**	The **Save configuration** button (label below) saves the configuration.

The tabs and fields

The configuration is organised in three tabs.

The **SII connection** tab holds the reporting connection: **NIF/CIF** is the Spanish tax identifier, **AEAT SII endpoint (pruebas/production)** selects the AEAT address and **SII active** switches reporting on or off.

The **Verifactu / TicketBAI** tab holds the QR settings: **QR verification URL (AEAT)** and **Verifactu enabled** relate to Verifactu; **TicketBAI QR URL (province)** and **TicketBAI enabled** relate to the (Basque) TicketBAI system.

The **AEAT certificate (mTLS)** tab holds the qualified client certificate for the mutual-TLS connection: **Keystore path** and **Keystore password**.

The **Keystore password** field is stored encrypted; leaving it blank keeps the stored value.

> **Tip:** Leaving password and secret fields blank leaves the already stored value unchanged.

Credits

Manage your members' credits — from a sale or a membership — with source, validity and status.

What are credits for?

Under **Credits** you manage your members' balances: amounts that arose from a sale or a membership and can be offset later. Each credit has an amount, a source, an expiry date and a status.

This keeps open balances in one place so you can redeem or cancel them deliberately instead of tracking them outside the system.

Menu path: Contacts > Memberships > Credits

The page requires access to your organization's finance and member administration.

The screen at a glance

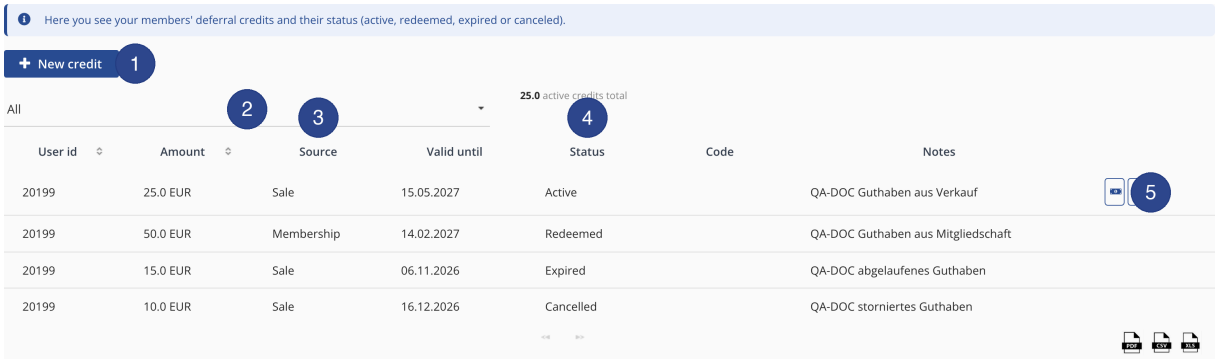


Figure 74: The credits list with filter, source and status

1 New credit	Creates a new credit — in the dialog you pick member, amount, validity (days) and source.
2 Status filter	Narrows the list to one status (active, redeemed, expired, cancelled) or shows all.
3 Source	Where the credit came from: a **Sale** or a **Membership**.
4 Status	State of the credit: **Active**, **Redeemed**, **Expired** or **Cancelled**.
5 Actions	For active credits: redeem or cancel.

Step by step: create a credit

1. Open **Contacts** > **Memberships** > **Credits**.
2. Click **New credit** and choose member, amount, validity and source.
3. Use the status filter to show active, redeemed, expired or cancelled credits.
4. For an active credit, redeem or cancel it via the action buttons.

> **Tip:** The total of active credits is shown at the top right above the list.

Contract actions

Process requested membership actions — cancellation, pause, resume, renewal — and approve or reject them.

What is the contract-actions inbox for?

Under **Contract actions** you find the changes members requested for their membership: cancellation, pause, resume, extraordinary action, renewal or expiry. Each row shows type, status, reason and — where relevant — the effective date.

This lets you review requests in one place and approve or reject them deliberately instead of hunting for them one by one in member administration.

Menu path: Contacts > Memberships > Contract actions

The page requires access to your organization's finance and member administration.

The screen at a glance



Figure 75: The contract-actions inbox with filter, type and status

1 Status filter	Narrows the list to one status (pending, approved, rejected, done) or shows all.
2 Type	Kind of requested action: **Termination**, **Pause**, **Resume**, **Extraordinary**, **Renewal** or **Expiry**.
3 Status	Processing state: **Pending**, **Approved**, **Rejected** or **Done**.
4 Reason	The reason the member gave for the action, if provided.
5 Actions	For pending requests: approve or reject.

Step by step: process a request

1. Open **Contacts** > **Memberships** > **Contract actions**.
2. Use the status filter to show pending, approved, rejected or done requests.
3. For each row, check type, reason and — for pauses or renewals — the **Effective date**.

4. For a pending request, approve or reject it via the action buttons.

> **Tip:** Rejected or done requests are kept as history and can be reviewed again via the status filter.