refbook

A quick-start guide for officials

refbook

WELCOME

Welcome to Refbook, a leading sports officials management (SOM) platform.

Officials are a special part of sport's success, and we believe they deserve dedicated technology to help facilitate everyday administration tasks.

Refbook's mission is use data and technology to manage sports officials in the most efficient and connected platform. The cloud-based solution offers seamless connections with leading technologies and is designed to make life easier for the officiating industry.

Refbook provides a holistic solution to managing officials, working to facilitate the most important aspects such as availability, conflicts, assigning, payments, expenses, paperwork and registration. The extensive functionality suite is designed to work for both grassroots and elite officiating, with flexible configuration abilities to suit every Organisation.

Native mobile apps are available for officials to manage their games, claims and other administration tasks 24/7 on-the-move. This allows Organisations to truly connect with officials using leading technology and solving the problems that make a difference.

Refbook has been selected by your Organisation to help better manage its officials, saving both time and stress, while improving accuracy and data insights.

The Official Solution.

Go Mobile

Manage your officiating on the go! Be sure to download the official Refbook mobile app for iOS or Android from the relevant app store.

About this Guide

This document is a basic user guide for officials to manage the most common functionality. Some of the functions contained within may not have been enabled by your Organisation's Administrator, so please check with them if you are unsure of the requirements.

- When you see this icon, click through to a short video explaining the concept further.

- When you see this icon, click through to the Knowledge Base explaining the concept further.

CONTENTS

NEW USERS

Creating an Account

Accessing the Refbook platform can be done via two methods:

- Head to https://www.refbook.online
- Download the mobile app for iOS or Android from the relevant app store.

1. Select the **Create an account** option on the homepage
2. Choose either method:
   a. Sign-up with Google credentials (eg: your Gmail details)
   b. Enter your first name, surname and email address
3. Read and accept the terms and conditions
4. Click 'Register'
5. You will receive a verification email. Please wait up to 5 minutes and check your junk/spam folder. Don't click 'forgot password' again as this will generate additional temporary passwords and create confusion for you.
6. Click on the link supplied
7. Once verified, a temporary password will be sent to you. Use this to login for the first time.
   Note: Please use this within 24 hours as the password will expire for security reasons.
8. You will be able to create a new password within your profile.

Registering for Online Support

Tip: It is strongly advised that all Organisation administrators and assignors also create an account to Refbook's Support Centre.

Joining Organisations

Once you have a Refbook user profile you're able to receive invitations from any Organisation to join their account as an administrator.

LOG IN

Accessing the Refbook platform can be done via two methods:

- Head to https://live.Refbook.online/ and click **LOGIN**
- Download the mobile app for iOS or Android from the relevant app store.

1. Sign in using your preferred method
   a. Using Google credentials
   b. Enter your username and password
2. Click **Log In**
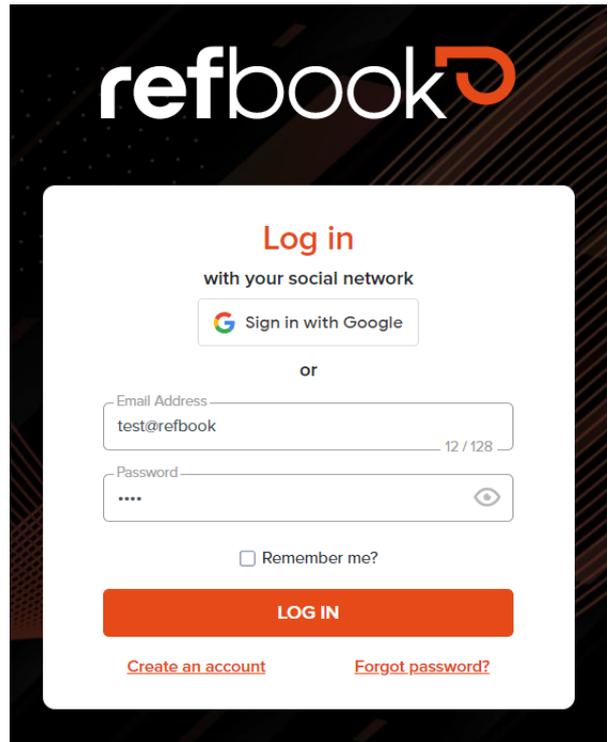
RESETTING YOUR PASSWORD

1. Click **Forgot password** on the home screen
2. Enter your email address and click **RETRIEVE PASSWORD**
3. You will receive a verification email to ensure you are making the password reset request. Click on the link supplied
4. You will receive a new temporary password in an email. Please wait up to 5 minutes and check your junk/spam folder. Don't click 'forgot password' again as this will generate additional temporary passwords and create confusion for you.
5. Use this temporary password to login.
6. Create a new password within your profile.

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Forgot password?

Email Address

RETRIEVE PASSWORD

BACK

CHANGING YOUR PASSWORD

You can easily change passwords through your user profile. This is typically required when:
   a. you have registered a new account and have been sent a temporary password that requires changing.
   b. you have forgotten your password, or have a temporary password that requires changing.
   c. you simply want to change your password.

Change password

Current password *

New password *

Confirm Password *

1. Head to **My Profile** (by clicking your name or the thumbnail dropdown, both located in the top right corner)
2. Click on the **Security** tab
3. Click **Change Password**

General   Identification   Accreditations   Travel   Organisations   Invoices   Payments   Notifications   Security

Change Password   Change Email   Security Questions   Two-Step Verification

4. Type in your current password (this may be the temporary password recently provided via email)
5. Type a new password and confirm password
6. Click **Save**
7. You will receive an email confirming your password has been changed.

COMPLETING YOUR PROFILE

Ensure all relevant personal details are entered and kept up-to-date on your Refbook profile to provide easy access to your connected Organisations.

Contact Information

1. Head to **My Profile** (by clicking your name or the thumbnail dropdown, both located in the top right corner)
2. Click **General** tab
3. Update your profile image by clicking **Change Image** and searching your computer or phone library
4. Fill out your details related to contact information (including emergency), addresses, nationality, location and timezones, and bank details. The mandatory fields are:
   o First name
   o Last name
   o Birthdate
   o Gender
   o Pronouns
   o Mobile phone
   o Home address

   Note: when entering home/work/association addresses, search for the address with the built-in Google Maps function by clicking the 📍 icon and using the quick-search feature.
5. Customise your privacy settings related to sharing mobile and email contact information, such as:
   o Organisation (every colleague in your connected Organisation(s))
   o Competition (colleagues in the same competition as you)
   o Direct (only personal 1-1 contacts inside Refbook)
6. Click **Save**

1. Head to **My Profile** (by clicking your name or the thumbnail dropdown, both located in the top right corner)
2. Click **Documentation** tab
3. Upload your relevant documentation by searching your computer or phone library (eg: children's checks, passport, drivers licence)
4. Fill out the related details such as ID numbers and expiry data
5. Click **Save**.

PROCESSING REGISTRATION

If your connected Organisation(s) have enabled registration (Organisation-based) or licencing (Federation-based), you will receive notification and see all relevant fees that are due to be paid.

Viewing Pending Registrations

1. Head to **My Profile** in the top right-hand corner.
2. Select the **Registration Payments** tab.
3. This will open up the initial screen of the 4-step process for processing online registration. This screen is a summary of the registrations that are available to you for transacting, according to the Federations/Organisations you're connected with and your officiating categories.

Note: not all local Organisations will have a registration fee. You will only be served registration fees from Federations/Organisations that are requiring payment from you.

Processing Registration (Organisation-based) and Licencing (Federation-based)

1. Head to **My Profile** in the top right-hand corner.
2. Select the **Registration Payments** tab
3. Select the relevant fees you wish to pay in this transaction.
   Note: you can register to all Federation(s)/Organisation(s) in the same transaction to avoid repeating this process for each entity.

4. Click **Next**
5. The summary allows you to review selections and fees incurred before proceeding to payment. If there are any errors or categories missing, click **Back**.

6. If this summary is correct, click **Proceed to Payment.** This step is preparing you before the online gateway will process your secure payments.
7. There are three sub-menus that you can review:
   a. General
   b. Selected Categories
   c. Summary

   Note: Refbook's payment gateway also has its own inbuilt summary step where you will review your cart before processing payment.
8. If any information is incorrect, click **Cancel Order**
9. If information is correct, click **Pay now**
10. You will be navigated to Refbook's external payment gateway. Provide the card information and details of the payer (who may be different to the registering user).
11. Click **Pay Now**
12. Once the transaction is approved, click **Finalise Transaction**

Note: If you do not complete payment in this step, when you next return to the registration payment page you will see the below message. After clicking **Proceed to Payment** you will be returned to Step 3 in the registration process.
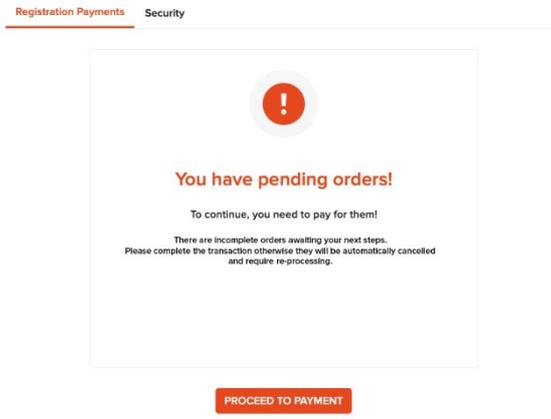
13. You will be returned to Refbook where the payment is shown as accepted. The registration is now complete and your Registration Status updated for the Organisation to view.
14. Click **Back to Homepage** or navigate to any other part of Refbook via the menus.
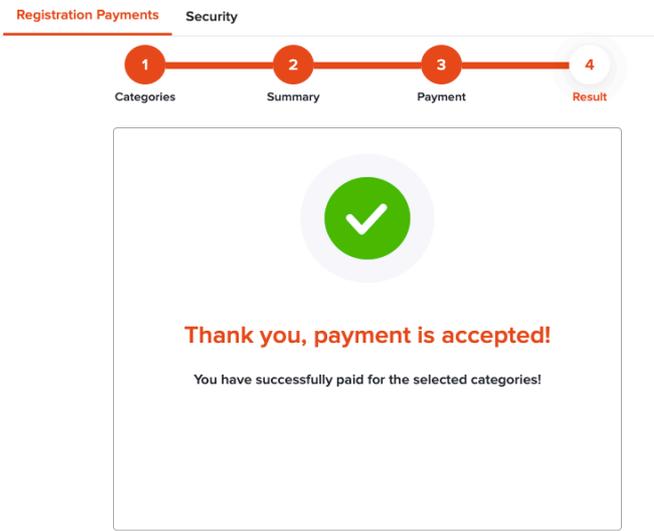
USER SUPPORT

Refbook is continually developing a robust support network for all users (administrators, administrators and officials).

Organisation Support

For further clarification on the specific usage within your organisation, including any matters related to personal appointments, availability or finances, please contact the Organisation directly for instructions or assistance.

Knowledge Base

Refbook's online support centre contains an online knowledge base providing instructional articles with screenshots. This resource is available 24/7 via permalink from the platform or directly via support.refbook.software and is constantly updated for new releases/features and real-life user cases. This support method is encouraged as it avoids support resources being unnecessarily consumed and is often a faster resolution for the user.

Support Desk

Refbook's online support centre allows users to create profiles in order to lodge/track question or problem 'tickets' in real-time. These should be matters related to platform functionality (eg: registration, password resets) and not related to Organisational assignment/financial matters or how to use the platform.

Where possible, users are first informed of Knowledge Base articles that may solve their needs before requiring a detailed ticket.

Visit support.refbook.software

Support Email

You may send an email directly to our support team via support@refbook.software. Refbook will use commercially reasonable efforts to respond to all support emails/phone calls within one to three business days.