CLUB·SIDE

COACH GUIDE

Clubside Coach Guide

Everything for your teams: rosters, registrations, communication, and (for head coaches) payments.

For Head coaches, assistant coaches, and trainers **Version** 1.1 · August 2026 **Online** clubside.io

Contents

1. Your role and what you can do

In Clubside you always sign in as a coach. What you can do is set per team, so your powers can differ from one team to the next.

Your access is **team-scoped**: you see only the teams an admin has assigned you to. Every list in the app (roster, registrations, invoices, calendar, and financials) is filtered to those teams. Coaches on other teams do not see yours, and you do not see theirs.

Within a team, there are two capability levels. A HEAD COACH gets money powers (invoices, payments, and Stripe setup). An ASSISTANT / TRAINER is view only: they can see the information but cannot create invoices, take payments, or change money settings.

At a glance

- **Access:** Team-scoped. You only see the teams assigned to you.
- **Head coach:** Full team control, including money (payment items, invoices, reminders, Stripe).
- **Assistant / Trainer:** View only. See rosters and registrations; no money powers.
- **Who sets it:** An admin assigns you to each team and picks your role on that team.

1 Capability matrix

Action	HEAD COACH	ASSISTANT / TRAINER
View the team roster	✓ Yes	✓ Yes
See registration submissions	✓ Yes	✓ View
Approve or reject registrations	✓ Yes	No
Create payment items	✓ Yes	No
Create and send invoices	✓ Yes	No
Send payment reminders	✓ Yes	No
Mark an invoice paid	✓ Yes	No
Connect the team Stripe account	✓ Yes	No
View team financials	✓ Yes	No
Message the team	✓ Yes	No
Add and manage calendar events	✓ Yes	No

NOTE

Head coach versus assistant is set **per team by an admin**. If you run more than one team, you might be a head coach on one and an assistant on another. If you expect a power you do not see, ask your club admin to check your role on that team.

2. Your dashboard and teams

Start here every time you sign in.

Find your teams

Sign in at your club address, for example `yourclub.clubside.io`. Your coach dashboard lists every team an admin has assigned to you. Select a team to open its roster from `Coach › Team`.

If your club places players by graduation year, each team's year drives where registering players land, so flag it to an admin if your team's year ever looks wrong.

Work the roster

The roster view lists the players on the selected team. Use **search and filter** to jump to a player by name, jersey number, or status. Each row shows the player, their team, and their current registration status.

Open a player profile

Select any player to open the full profile. It gathers everything about that player in one place.

1. **Select the player from the roster.**
   The profile opens with their name, team, jersey number, and grad year.
2. **Review registration history.**
   See past and current registrations for the player.
3. **Check documents and info.**
   Uploaded documents, medical notes, and contact details are all listed on the profile.
4. **See invoices.**
   Any invoices tied to the player appear here, with their paid or unpaid status.

3. Reviewing registrations

Clubside registration is two-stage: a parent registers, a coach or admin approves, then payment happens.

The pending queue

New submissions for your teams land in a **pending queue**. Admins and the team coaches review them from `Coach › Registrations`. Reviewing and deciding is a head coach and admin action; assistants and trainers can view submissions but not approve them.

Review a full submission

Open a submission to see everything the parent entered: player info, guardian info, medical details, emergency contacts, and any uploaded documents. Your club decides which fields are required, so the exact set can vary.

Approve or reject

1. **Open the pending submission.**
   Read through the player, guardian, medical, and document sections.
2. **Approve to add the player to the roster.**
   Depending on your club, approval either unlocks payment or auto-generates an invoice that is emailed to the parent.
3. **Or reject with a reason.**
   The parent receives a decision email that includes the reason you enter, so they know what to fix.

> **NOTE**
>
> A registering parent may be **claiming an existing roster player** (common right after a club imports its roster). You approve it the same way. When the player's name and date of birth match an unclaimed roster row, approval **attaches the parent to the existing player** instead of adding a duplicate.

4. Money powers HEAD COACH

These actions are available to head coaches and admins. Assistant coaches and trainers can see invoices, but cannot create, send, or settle them.

Payment items

Create reusable fee definitions for your team, such as a registration fee, a uniform charge, or a tournament fee. Flag an item as "requires approval" so it auto-invoices when a registration is approved.

Invoices

Create an invoice per player, per team, or in bulk. Use **Send Payment Request** to invoice the whole team at once. Partial payments are supported, and receipts are automatic.

Reminders

Send a manual nudge for an upcoming or overdue invoice. Automated reminders are plan-gated and run for the club, so a manual reminder is always available to you as a backup.

Mark paid

Took a cash or check payment offline? Mark the invoice paid to keep the player's balance and your team financials accurate.

Send a bulk payment request

1. **Start from Financials.**
   Open `Coach › Financials` and select `Send Payment Request` for the team you are collecting for.
2. **Pick a payment item and the players.**
   Choose the fee (for example, season dues) and select the whole team or a subset.
3. **Send Payment Request.**
   Each family gets a branded invoice email. Parents can pay one invoice or several at once.

> **NOTE**
>
> Assistant coaches and trainers **cannot** create payment items, create or send invoices, send reminders, or mark invoices paid. If you need these on a team, ask an admin to make you a head coach on that team.

5. Getting your team paid

Under per-team payment routing, each team collects into its own bank account.

Some clubs route money **per team** rather than through one club account. When that is on, the head coach connects the team's own **Stripe account**. Money from your team's invoices then flows **straight to that account**. Clubside never holds your money; the connected account is the merchant of record.

Connect and check status

1. **Open your Financials page.**
   Go to `Coach › Financials`. If your club routes payments per team, a
   Team Payment Accounts
   card appears for each team you head-coach.

2. **Select "Connect Team Account".**
   Choose
   Continue Setup
   instead if you started earlier and are picking it back up.
3. **Complete Stripe onboarding.**
   You are handed off to Stripe to verify the team's details and bank account.
4. **Confirm it shows connected.**
   The card shows the connection status, and admins can see per-team account status across the club.
5. **Refresh if the status lags.**
   Use the refresh icon on the card if the status has not caught up after you return from Stripe.

> **NOTE**
>
> If your club routes payments org-wide, this card does not appear. The club's single account collects everything, and there is nothing for you to connect.

Where the money goes

- **To your team:** Funds land in the connected team Stripe account.
- **Card fees:** The team is the merchant of record and pays Stripe's standard card fees (about 2.9% + 30 cents).
- **Clubside fee:** A small platform fee that decreases by plan. Your club may absorb it or pass it to parents as a clear "Processing fee".

> **TIP**
>
> Finish Stripe setup **before** you send invoices. That way parents can pay the moment they get the request, and the funds land in your team account with no delay.

6. Team financials

A live view of what your team has collected, distributed, and holds.

Open `Coach › Financials` to see your team's numbers, all derived from real payments (not manual entries).

- **Revenue collected:** total paid in for the team.
- **Distributions out:** money paid out or allocated, with recorded history.

- **Current balance:** what the team has on hand right now.

You can **export a CSV** of the detail for your own records or to share with the treasurer.

> **NOTE**
>
> Financials are a **head-coach surface**. Assistants and trainers do not see the Financials tab at all. Recording fund distributions and setting up financial config are typically run by an admin. The system blocks over-distribution, so a team can never distribute more than it holds.

7. Inviting a parent to claim a player

The clean way to connect the right family to a player you already have on the roster.

If your club **bulk-imported its roster**, some players have no parent account attached yet. These are "unclaimed". Rather than wait for each parent to register, you can invite the exact parent to claim the exact player.

1. **Find the unclaimed player on your roster.**
   Open `Coach › Team` and locate the player who has no linked parent.

2. **Send a claim invite.**
   Clubside generates a
   tokenized claim invite
   : a secure, single-use link bound to that one specific player.

3. **The parent claims the player.**
   The link expires in
   14 days
   , and because it is bound to one player, the right parent connects to the right player with no duplicate created.

> **NOTE**
>
> A parent can also connect on their own by registering. When the player they enter matches an unclaimed roster row by name and date of birth, they are prompted to confirm it is their player, and approval attaches them to the existing row (see section 3).

8. Calendar, events, and RSVPs

Keep the team on the same schedule and know your headcount.

Add practices and games

From `Coach › Calendar` you can add events for your team: mark a game as home or away, name the opponent, set the location, and add notes. Events can be exported as an ICS file for personal calendars.

RSVPs and headcounts

Parents **RSVP per player**, so you see who is coming before practice. Check the headcount the day before to plan drills and stations.

1. **Create the event.**
   Set the type (practice or game), date, time, and location.
2. **Add game details if needed.**
   Home or away, opponent, and any notes for families.
3. **Watch the RSVPs come in.**
   Each family responds per player, and your headcount updates as they do.

> **NOTE**
>
> Adding and changing events follows your team role. Assistant coaches and trainers can see the schedule and headcounts, but adding or editing events is a head coach action.

9. Communicating with your team

Reach every family with one message, and know it arrived.

From `Coach › Communications` you can send an announcement or a bulk email to your whole team or a filtered set of families. All email goes out branded as your club, from the club's identity.

- **Announcements and email:** one message to the whole team or a subset.
- **Delivery tracking:** see per-recipient delivery status, so you know who received it.

NOTE

Sending messages follows your team role. View-only coaches can read what has gone out; sending to the team is a head coach action.

10. Tips and getting help

A few habits that keep your team running smoothly.

TIP

Head coaches: connect your team's Stripe account first, then send invoices. Parents can pay right away and money lands in your team account.

TIP

For season dues, use **Send Payment Request** to invoice the whole team at once instead of billing families one at a time.

TIP

Check RSVPs the day before practice. A quick headcount makes planning drills and stations much easier.

TIP

If an action you expect is missing, it is almost always your team role. Confirm with your club admin whether you are a head coach or an assistant on that team.

Get help

Questions or something not working right? Email support@clubside.io and the Clubside team will help. You can also explore every coach feature risk free at `demo.clubside.io` (no signup, test-mode only).