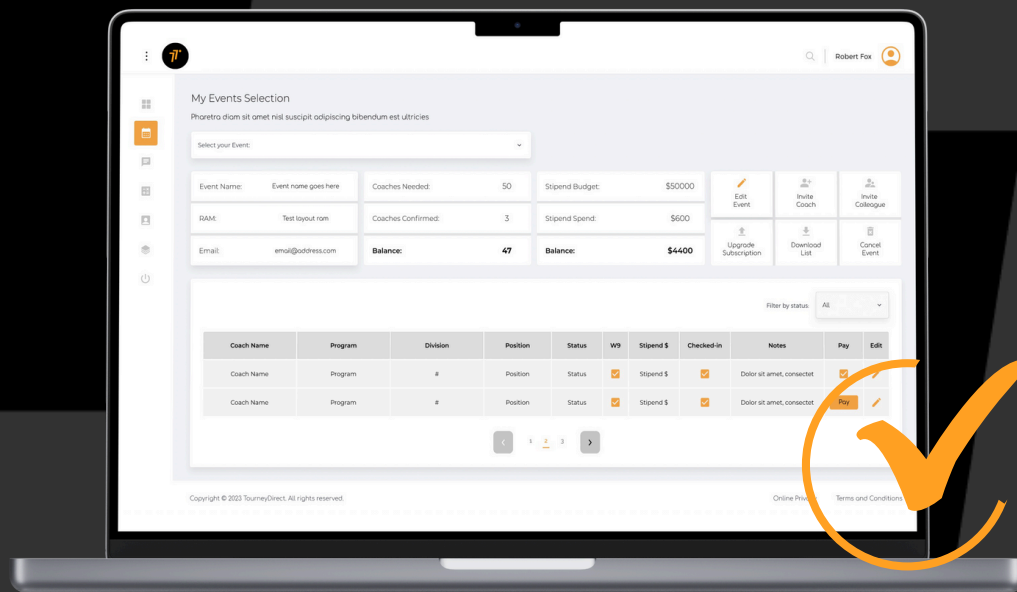# TOURNEY DIRECT

TD Staff
Onboarding Checklist

Welcome to Tourney Direct! Let's Get You Set Up.
Complete these steps to start managing
your events smoothly.

☐ | **Step 1: Add Colleagues to Your Account (2 mins.)**

- Add colleagues to your Tourney Direct account using the **Invite a Colleague** button.
- Assign roles to each colleague (ex. Head Trainer, Assignor, Event Support, etc.)
- Provide them with the resources and help center links to assist them in getting started.

☐ | **Step 2: Create Your First Event (5 mins.)**

- **Add a new event** and enter event details (name, date, location, description, etc.).
- If staffing with officials and trainers, set-up shifts for your event.
- Upload your event logo.

☐ | **Step 3: Manage Staffing (Ongoing)**

- Use the **Invite Coach/Staff/Trainer/Official buttons** to send a personalized 1-on-1 invitation **_from you_** to staff recruiting them to work your event.
- Send a mass email with the **stipend sign-up form link** embedded for a quick and easy 2-step interest submission process for those interested in working.
- As interest is submitted, it will be shown under the appropriate staff type tape (ex. collegiate coaches under coaches, trainers under Athletic Trainers, etc.).
- If a staff candidate submits an interest form and you wish to confirm them, simply **confirm their status in the dashboard and assign a payment amount**. They will automatically receive an e-confirmation, and their portal will be updated accordingly.

☐ | **Step 4: Update Event Information (3 mins.)**

- Use the **Edit Event** button to update essential operational details for your event staff. This can include arrival times, schedule uploads, field maps, event expectations, and more to help them prepare effectively.