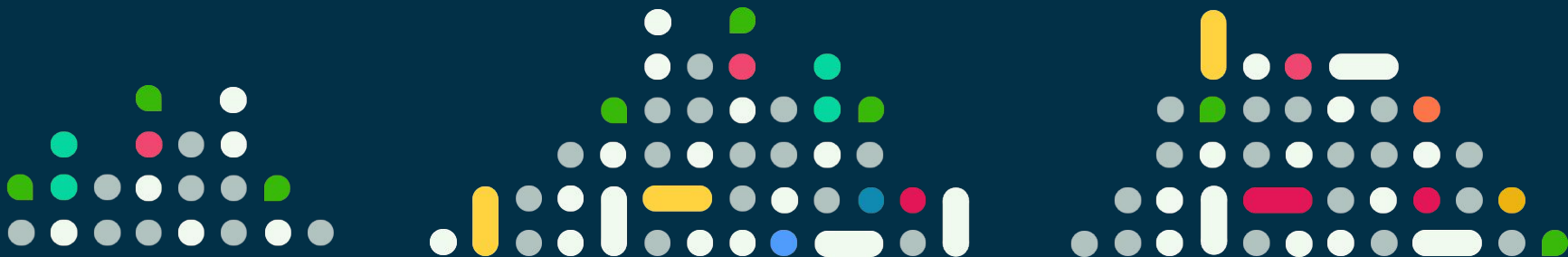


Welcome to TidyHQ 101 Help Guide



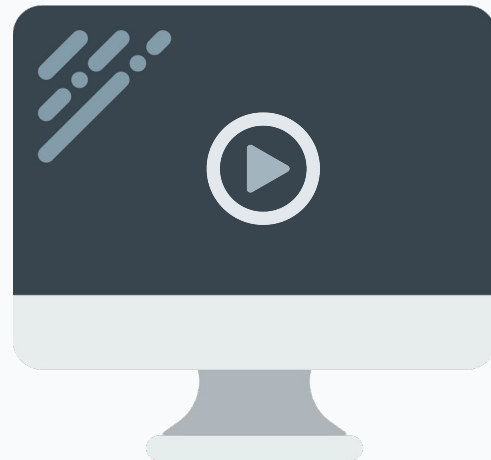
New to Tidy?

Watch the 101 Webinar on-demand

<https://youtu.be/0pILGxjl9HE?feature=shared>

TidyHQ Quick Overview

<https://youtu.be/qXVEuZ3Rjis>



TidyHQ is your administration platform

Our mission is make administration simpler and run better, now and for future generations.

Purpose built for volunteer administrators

It's the back office for your organisation

Stay in sync from anywhere

Built for
volunteer
admins to
simplify and
future-proof
your
organisation's
back office

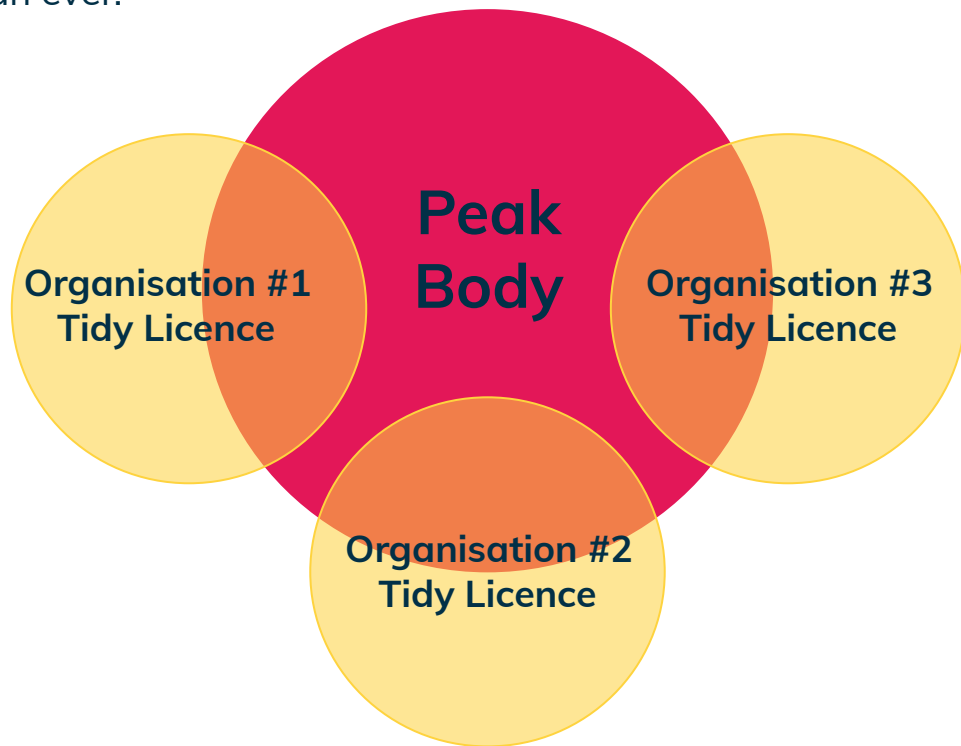
What does my TidyHQ account include?

- Automatic access to the basic apps of TidyHQ (Contacts, Communicate, Finances, Tasks, Web Pages)
- Access to the Projects app to allow you to communicate with your League
- 200 emails per month able to be sent via the Communicate app (if you choose to use it)
- Ability to restrict permissions for administrators to various parts of the platform - this feature is typically only available on the full Pro plan
- Access to any **TWO** of the additional apps listed in the “Apps” section of TidyHQ (eg Shop, Meetings, Events, Storage)

***If you want access to more apps, contact us directly for upgrade options**

How Tidy... Connects

Your organisation is part of a cohesive network, making collaboration with your peak body simpler and more efficient than ever.



What does QRL have access too?

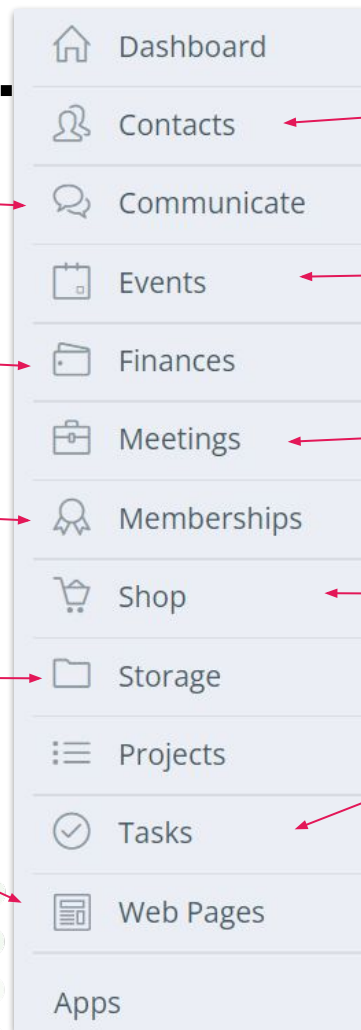
The only things that the league can see are:

- The name and email address of people you have allocated to a role within your TidyHQ account
- The answers to project tasks that you submit to them
- Comments within the Discussions tab of a Project Task that you have selected to send to “project organisers and my club”

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



Did you know Tidy can..



Email and SMS

Keep track of all your members details

Sell tickets to your events

Manage your club income & expenses

Streamline your meeting agendas and minutes

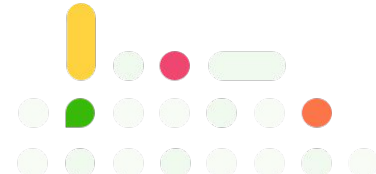
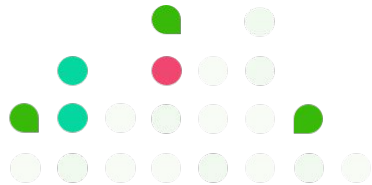
Provide a consistent member experience across your club

Sell your clubs merchandise

Be a central spot for all your important documents

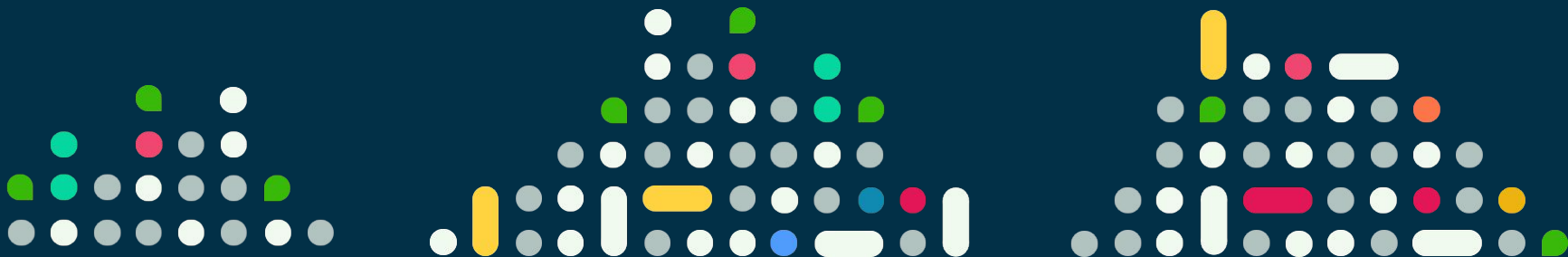
Track all the things your club needs to get done

Be your Club's website host



Step 1.

Basic Organisation Settings



Organisation Settings : The Basics

First thing is to Log into your account and ensure your organisation details are correct. Please head to the left side of your screen and go to the Organisation Settings From here ensure the following details are correct

- Organisation name
- Mailing address
- Time

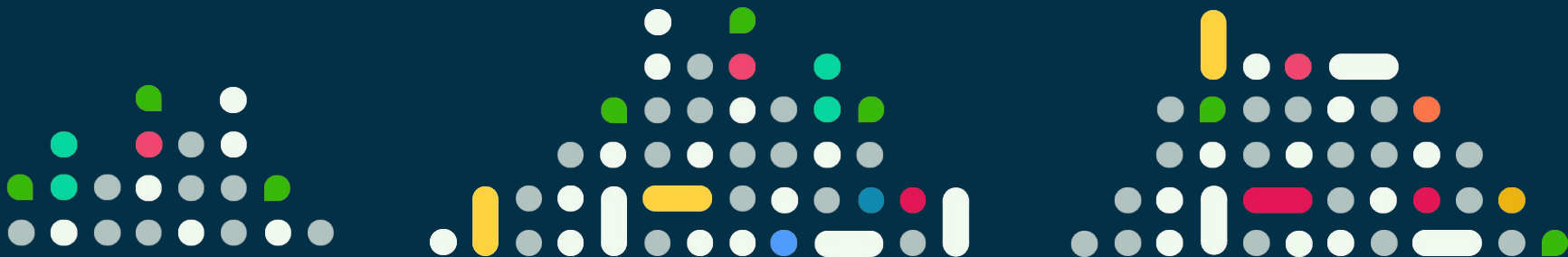
Once all done, click save and mark this task as done.

For more information, please check out the [support guide](#) on TidyHQ Help Centre

Here is a [quick short video guide](#)

Step 2.

Give your team access to Tidy



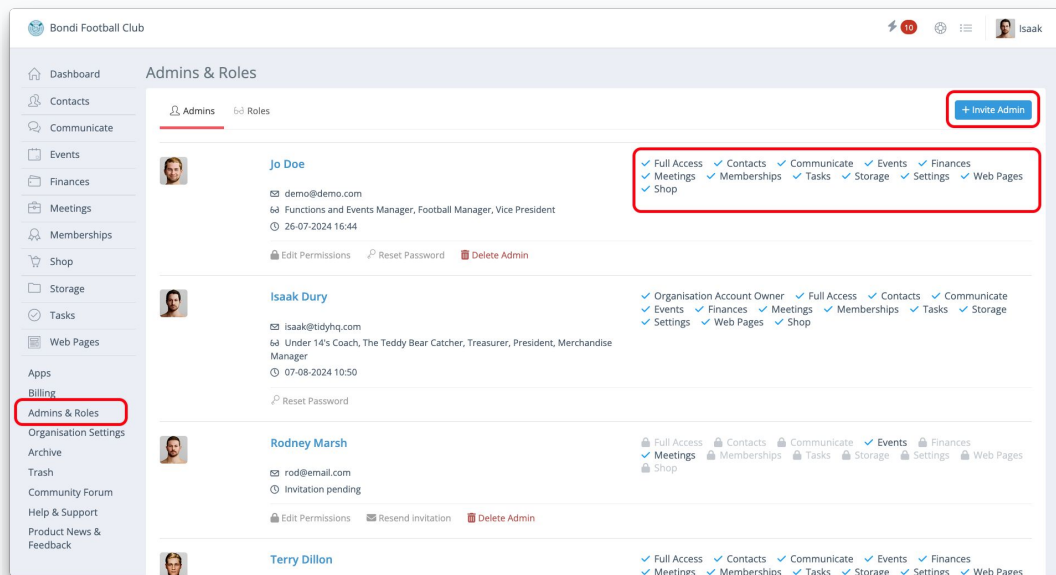
Admins and Roles

- TidyHQ is designed as a tool for ALL the committee to use. Every person on your committee should have administrator access.
- You can control the permission for each section of Tidy, so not all admins have to see everything.
- Each admin should be given a Role in Tidy - helps with handover, assignment of Tasks and keeping QRL in the loop with who is running your club



Action 1: Invite your Administrators

Invite contacts to be administrators by sending email invitations



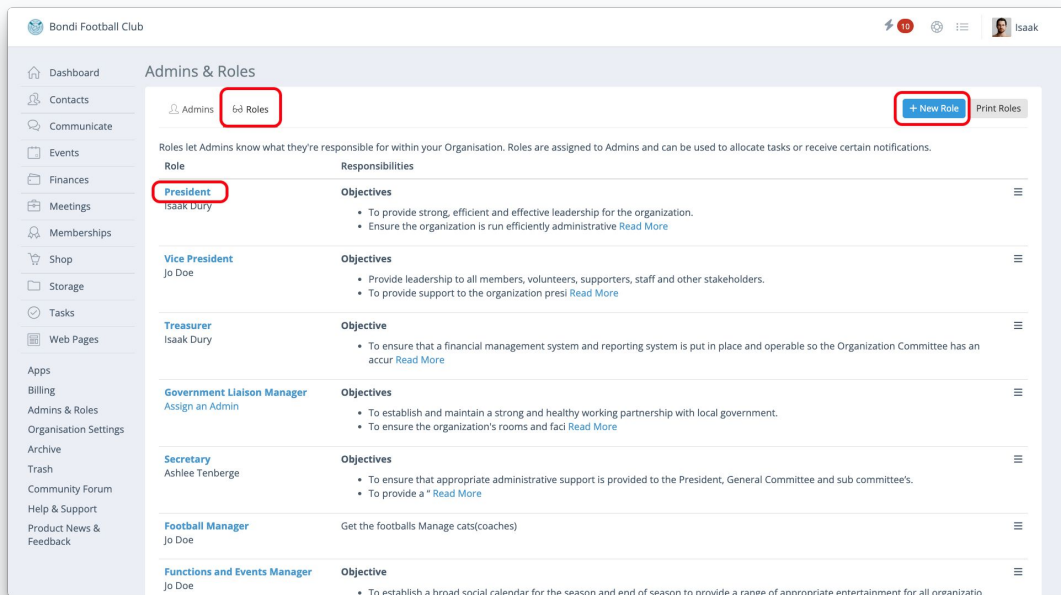
Admins need to be already added as contacts before you can invite them

Learn more:

<https://support.tidyhq.com/en/articles/76542-tidy-set-up-step-3-add-administrators-to-your-organisation>

Action 2: Create Roles and assign admins

Create a ready-made succession plan where assigned tasks stay with the role, not the person



Learn more:

<https://support.tidyhq.com/en/articles/76528-tidy-set-up-step-4-add-roles-to-your-organisation>

Action 2: Create Roles and assign admins

Roles make handover a breeze!

Edit Role

Role Name

President


Responsibilities

****Objectives****

- * To provide strong, efficient and effective leadership for the organization.
- * Ensure the organization is run efficiently administratively, financially and socially to support the on-field activities.
- * To provide support to the Executive and Committee members to ensure the efficient operation of the organization.
- * To provide a safe and enjoyable recreational environment for all organization members and ensure all activities are participated in a fair spirit.

Admin

Pick an Admin

 Isaak Dury

isaak@tidyhq.com

Allow for Messaging

☐

.demo@mail.tidyhq.com

Delete

Cancel

Save

Hint: Print out the Roles for your AGM

Print out or share the generated PDF

- * Provide a report on portfolio operations to the mon
- * Seek ratification from the appropriate committee m any financial expenditure or action

Treasurer

Objective

* To ensure that a financial management system and the Organization Committee has an accurate, true an the organization at all times.

* To provide support to the Executive and Committee organization.

Responsibilities

* Prepare the annual budget of the organization for p (the draft budget having earlier been formulated by t

* Ensure all Managers and general committee memb expenditure without reference to the General Commi

* Promptly attend to general banking activities.

* Maintain appropriate accounts of all income and ex

* Report monthly to the Organization Committee on l

* Present all accounts for payment for approval.

* Prioritise payment of accounts.

* Make details of all accounts available to the Organiz

* Oversee and seek reports of all other accounts held

* Manage any overdraft facility held by the organizati

* Ensure any surpluses are invested wisely after appr

* Ensure all taxation commitments are met by the org

* Issue tax certificates to employees as required unde

* Ensure the organization finances are correctly audit

* Report activities of the portfolio to the membership

* Assist other Committee members in their duties as

* Undertake tasks at the request of the President, Exe

* Maintain and complete all salary cap reporting requ

Relationships

* Reports to the Organization Committee.

* Liaises with the Executive.

* Liaises with official organization suppliers & other k

Accountability

* The Treasurer is accountable to the President and t

* The Treasurer shall seek ratification from the Gener

including debt reduction and thereafter shall have the

and strategy to approve expenditure.

* The Treasurer shall provide a monthly report to the

Government Liaison Manager

Objectives

* To establish and maintain a strong and healthy wor

* To ensure the organization's rooms and facilities res



Bondi Football Club

powered by TidyHQ

Bondi Football Club

PO Box FAKE, Springfield,
QLD, 4300

Roles

President

Isaak Dury

Objectives

* To provide strong, efficient and effective leadership for the organization.

* Ensure the organization is run efficiently administratively, financially and socially to support the on-field activities.

* To provide support to the Executive and Committee members to ensure the efficient operation of the organization.

* To provide a safe and enjoyable recreational environment for all organization members and ensure all activities are participated in a fair spirit.

Responsibilities

* Ensure subcommittees and committee members fulfil their responsibilities to the organization.

* Preside at all meetings of the Organization Committee.

* Report activities of the portfolio to the membership at the Annual General Meeting.

* Assist other Committee members in their duties as required.

* Undertake tasks at the request of the President, Executive or General Committee.

* Collect the Ice!!!

Relationships

* Reports to the Members and General Committee of the organization.

* Acts as or ensure his/her delegate acts in the best interests of the organization at League, or

Delegates Meetings.

* Supports all Managers, Committee Members and other stakeholders.

Accountability

* The President is accountable to the Members and the General Committee.

* Provide a report on portfolio operations to the monthly Committee meeting.

* Seek ratification from the appropriate Committee member prior to committing the organization to

any financial expenditure or action.

Vice President

Adam Hutchinson

Objectives

* Provide leadership to all members, volunteers, supporters, staff and other stakeholders.

* To provide support to the organization president

* To provide support to the executive and committee members to ensure the organization's efficient operation

Responsibilities

* Ensure the effective and efficient operation of the executive and all related operations.

* Preside over meetings in the absence of the president

* Ensure that all volunteers and support staff are carrying out their duties as required

* Oversee recruitment of volunteer and staff roles according to policies outlined by the Organization Committee

* assist other committee members in their duties as required

* undertake tasks at the request of the president, executive or general committee

Relationships

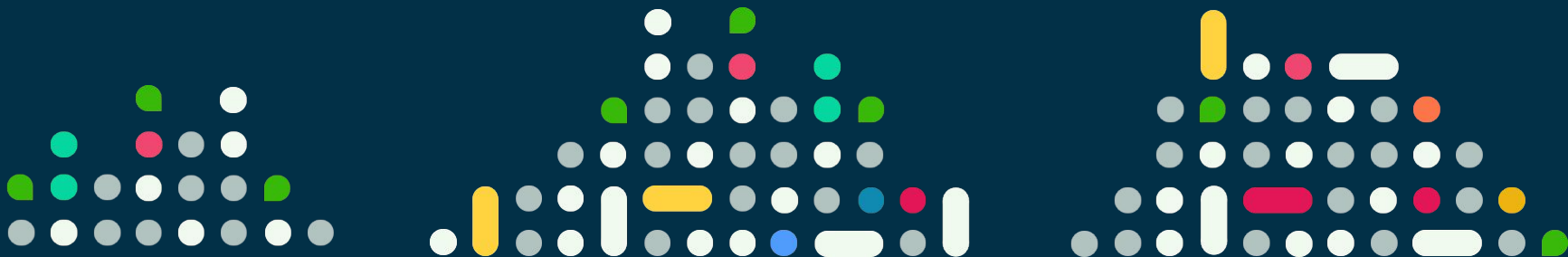
* Reports to the organization's president and general committee.

* Supports all support staff and volunteers

* Liaises with the executive

* Liaises with official organization suppliers & other key stakeholders

Step 3. Projects and Tasks



Working with your peak body: **Projects and tasks**

Projects are set by your peak body for your club to complete

1. Accept the project invitation (Please do this even if it's not your individual project to work on)
2. Review the overview description, due date and tasks
3. Assign each tasks to a role within your club (who is responsible for what)
4. Send messages to your peak body about the tasks if unsure
5. Mark each task completed when it's done

(some tasks may need to be approved by your peak body, click Submit to Project Organisers once completed)

6. Create internal notes for your club

You've been invited to a project.

Peak Body

have invited you to respond to Project for a
Test

You will have access to complete this project from your projects page.

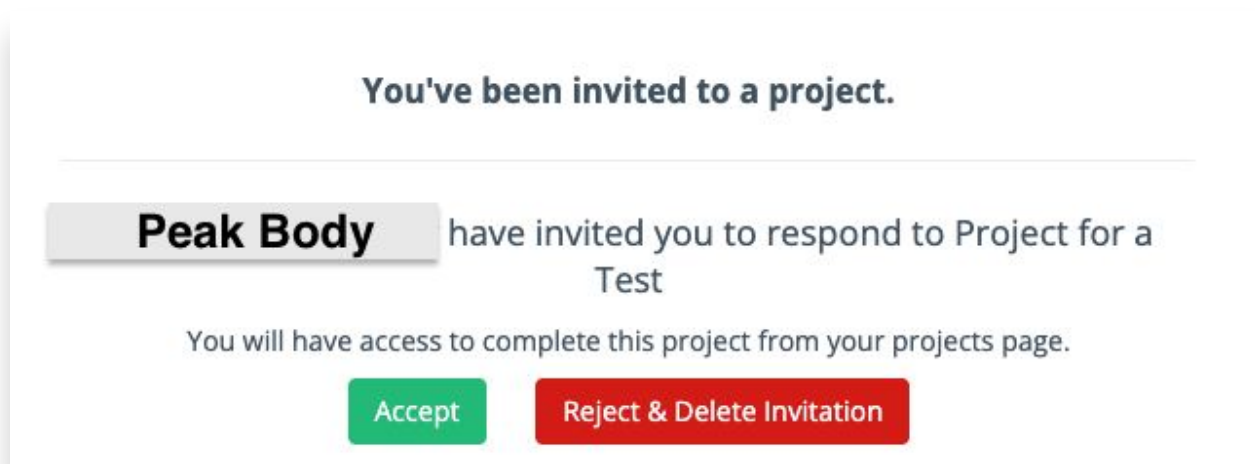
Accept

Reject & Delete Invitation

Working with your peak body: **Projects and tasks**

Projects are set by your peak body for your club to complete

Step 1. Accept the project invitation. Please do this even if it's not your individual project to work on



Working with your peak body: Projects and tasks

Step 2. Review the overview description, due date and tasks.

Season 2025 Preparation - ALL Associations

30-06-2025 In progress

Overview Tasks

Owner

THQ Peak Body (Demo)

Invited	Accepted
30-04-2025	01-05-2025

Attachments 0

Labels

Description

Dear Associations,

Welcome to another season

Please review all the tasks within this project for preparation of the 2025 Season ahead.

You can assign the tasks to each committee member within your club to make them responsible for specific tasks.


If you have any questions, please contact jasmine@tidyhg.com


















These need to be **completed before 30 June 2025**

Working with your peak body: Projects and tasks

Step 2. Review the overview description, due date and tasks.

Season 2025 Preparation - ALL Associations

Overview **Tasks** 

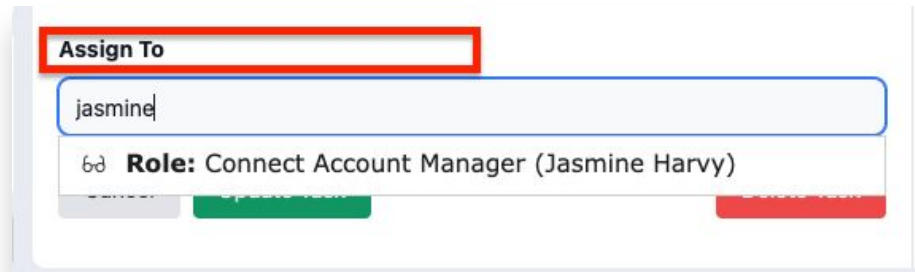
- Club Registration & Affiliation**
 To Do  07-05-2025  Unassigned
- Upload Working With Children Checks**
 To Do  09-05-2025  Unassigned
- Review 2025 Rule Changes**
 To Do  09-05-2025  Unassigned
- Apply for Local Sport Grants**
 Done  28-05-2025  Unassigned
- Confirm Key Volunteers**
 To Do  18-06-2025  Unassigned
- Attend 2025 Kick-Off Webinar**
 Done  Unassigned

Working with your peak body: Projects and tasks

Step 3. Assign roles to specific tasks.

- Click the task and select 'edit task'
- Navigate to the Assigned to and search the role
- Select the Role
- Click Update Task
- The role is now responsible for this task

If you leave tasks unassigned, then all admins will receive notifications learn more about it on our guides



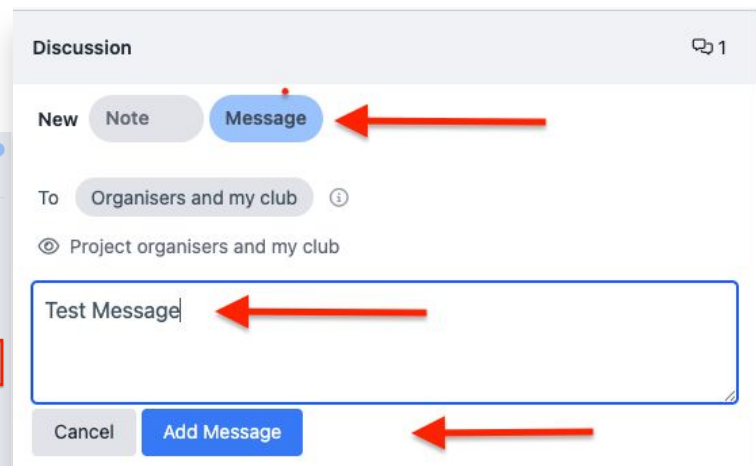
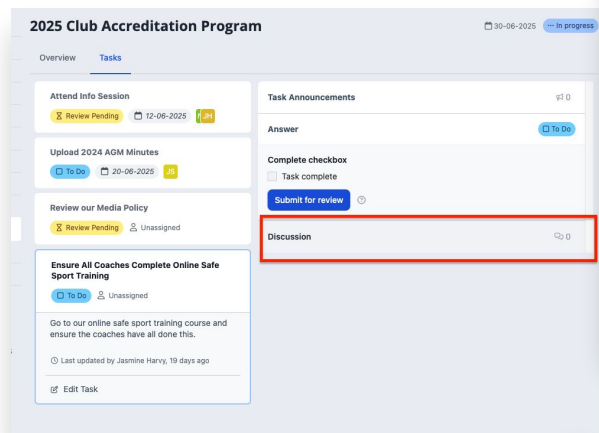
The screenshot shows a web interface for assigning roles to tasks. At the top, there is a red-bordered dropdown menu labeled "Assign To". Below it is a search bar containing the text "jasmine". Under the search bar, a list of roles is displayed. The first role is "6d Role: Connect Account Manager (Jasmine Harvy)". Below this role name, there are three colored buttons: a grey button, a green button, and a red button. The green button is highlighted.

<https://youtu.be/4HBaiusN928>

Working with your peak body: Projects and tasks

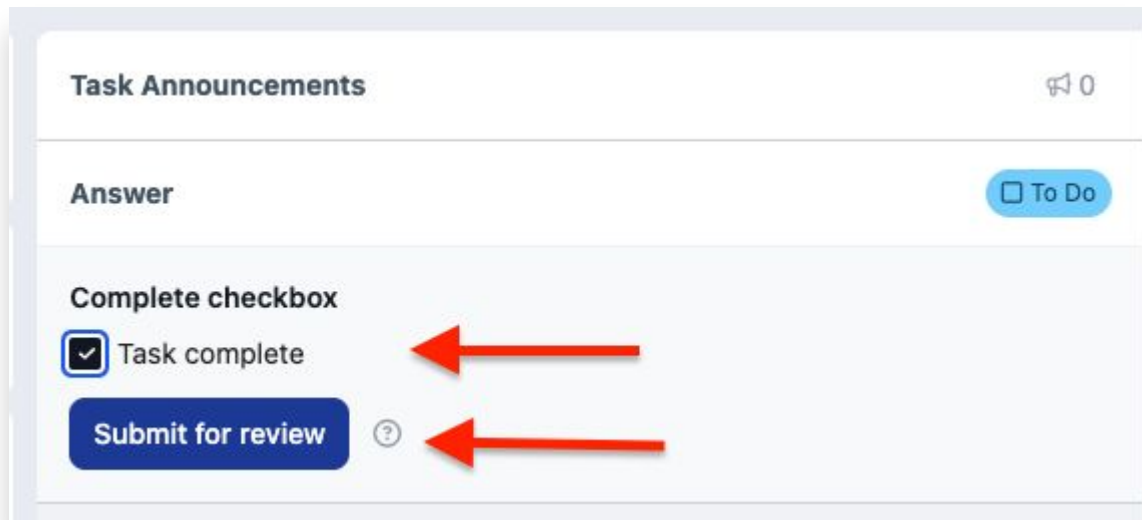
Step 4. Send messages to your peak body about specific tasks and/or leave internal notes for your club members.

- Click the task and select the discussion tab
- Navigate to message button (should highlight blue colour)
- Type your message
- Click add message
- The message will be sent to the Peak Body



Working with your peak body: Projects and tasks

Step 5. Mark each task completed once it's done.



The screenshot shows a user interface for 'Task Announcements'. At the top right, there is a speaker icon and the number '0'. Below this is a section titled 'Answer' with a blue button labeled 'To Do'. Underneath, there is a 'Complete checkbox' section. It contains a checked checkbox followed by the text 'Task complete'. Below this is a blue button labeled 'Submit for review' and a small circular help icon with a question mark. Two red arrows point to the checked checkbox and the 'Submit for review' button.

Working with your peak body: **Projects and tasks**

Tasks App allows you to track all tasks in one location. Relevant to projects or not.

- Keep on top of project tasks and individual tasks from this view. You can assign volunteers to any tasks that they need to complete
- Reminder notices will be sent leading up to the task's due date
- Use the filters to see all clubs tasks, or just your own tasks



It's a great way to break up bigger '**Project Tasks**' that may have been sent to you from your peak body, particularly if there's several administrators who all need to action something as part of that large project.



Use the apps for internal responsibilities: tasks

Projects and

Internal and Templates are also available for use in Projects app

Connected organisations can utilise the projects app to its full capacity for their own internal club use.

For Example:

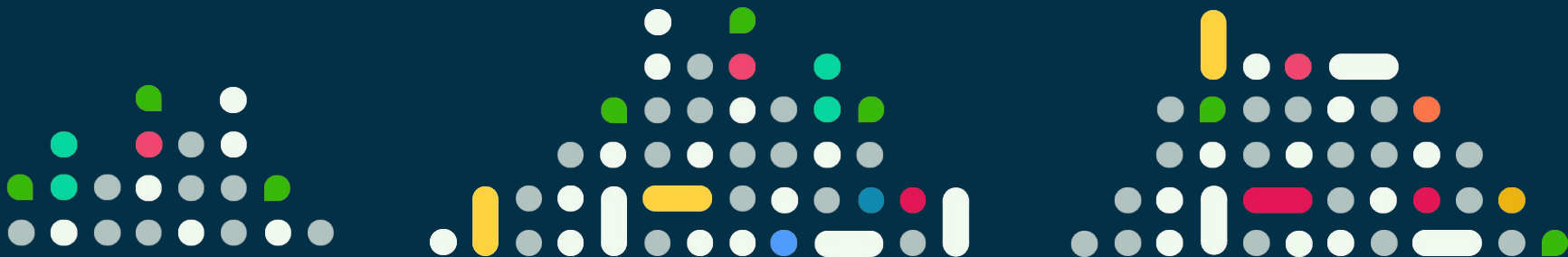
Club Event Preparations

Onboarding/Offboarding Committee Members



Step 4.

Make the most of your Free TidyHQ account

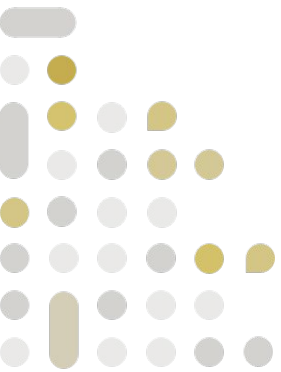


Navigating all the Tidy apps: **Snapshot**

Click into the Apps and install the apps that will benefit your club

Popular apps include - Web Pages, Meetings, Finances, Shop, Storage

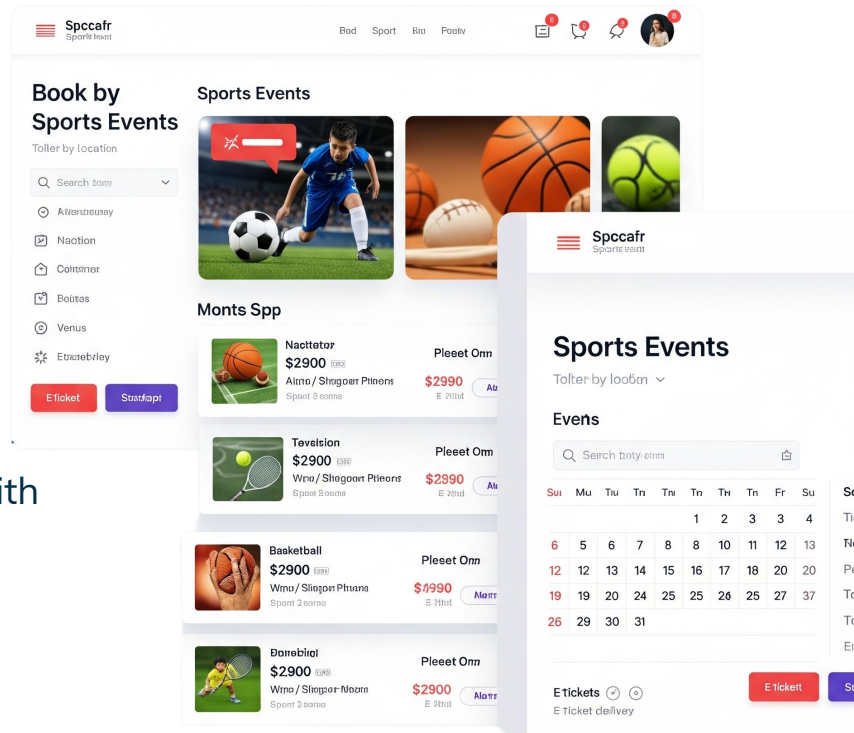
- Webpages is automatically added to your TidyHQ account
- Simply install the app and it will be added to your TidyHQ account
- Use integrations to make life easier



Navigating all the Tidy apps: Events

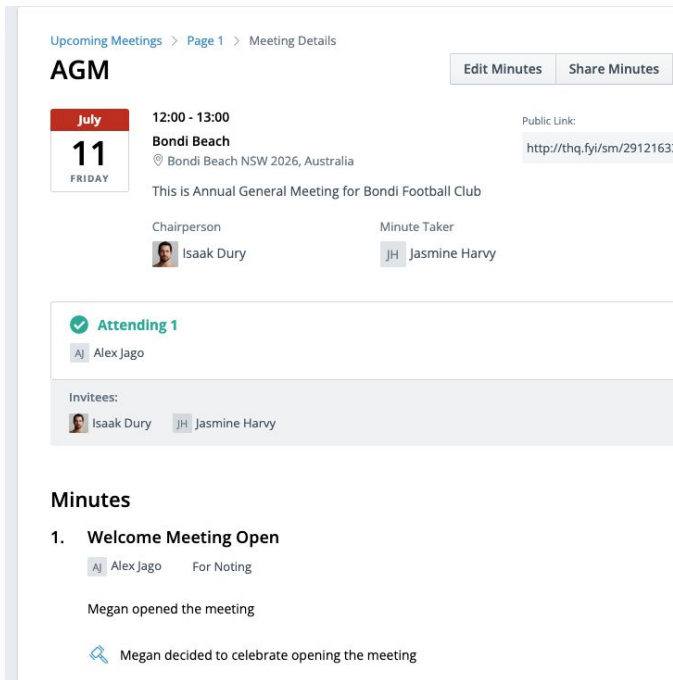
- Sell tickets to both members and the public. Set different prices for each ticket type.
- Collect information for each order, or each ticket holder eg dietary requirements.
- Purchasers automatically added to a contact Group so you can get in touch with them quickly.
- Ticket purchase also tracked on member's profile so you can see how engaged they are (or not!) with your club.

Tip:
Post Events on
your Webpage
too!



Navigating all the Tidy apps: Meetings

- When you're ready to meet, click "Start Meeting" and your agenda will turn into minutes!
- Use the "Decision" section for each agenda item to clearly show where motions were raised and voted on.
- Assign Tasks to Roles on your committee from within the minutes - no need to track separately and the Role that's assigned will receive an email notification to let them know they have work to do.



The screenshot displays the 'Upcoming Meetings' page for an 'AGM'. The breadcrumb trail is 'Upcoming Meetings > Page 1 > Meeting Details'. At the top right are buttons for 'Edit Minutes' and 'Share Minutes'. The meeting title is 'AGM'. A calendar widget shows 'July 11 FRIDAY'. The time is '12:00 - 13:00' and the location is 'Bondi Beach', with a note 'Bondi Beach NSW 2026, Australia'. A public link is provided: 'http://thq.fyi/sm/2912163'. The description states 'This is Annual General Meeting for Bondi Football Club'. Roles are listed: 'Chairperson' (Isaak Dury) and 'Minute Taker' (Jasmine Harvy). The 'Attending' section shows '1' person, 'Alex Jago'. The 'Invitees' section lists 'Isaak Dury' and 'Jasmine Harvy'. The 'Minutes' section begins with '1. Welcome Meeting Open', where 'Alex Jago' is 'For Noting'. A log entry shows 'Megan opened the meeting' and a decision: 'Megan decided to celebrate opening the meeting'.

Upcoming Meetings > Page 1 > Meeting Details

AGM [Edit Minutes](#) [Share Minutes](#)

July 11 FRIDAY 12:00 - 13:00
Bondi Beach
Bondi Beach NSW 2026, Australia
Public Link: <http://thq.fyi/sm/2912163>

This is Annual General Meeting for Bondi Football Club

Chairperson: Isaak Dury Minute Taker: JH Jasmine Harvy

✓ Attending 1
AJ Alex Jago

Invitees:
Isaak Dury JH Jasmine Harvy

Minutes

1. Welcome Meeting Open
AJ Alex Jago For Noting

Megan opened the meeting

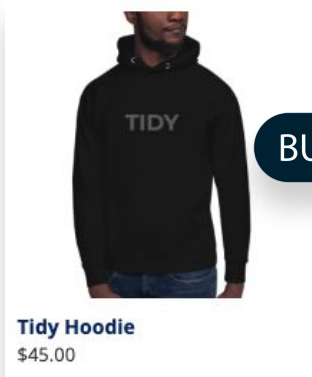
Megan decided to celebrate opening the meeting

Navigating all the Tidy apps: **Finance & Shop Apps**

Track income, expenses, P&L on the Finance app dashboard

- Breakdown of transactions
- Issue invoices directly from TidyHQ platform
- Cash flow reports and share with the team
- Use integrations to make life easier

TidyHQ offers
a cash book
accounting.
For more in
depth
integrate with
Xero



BUY NOW



Set up your merchandise in the Shop app

Sell club merchandise

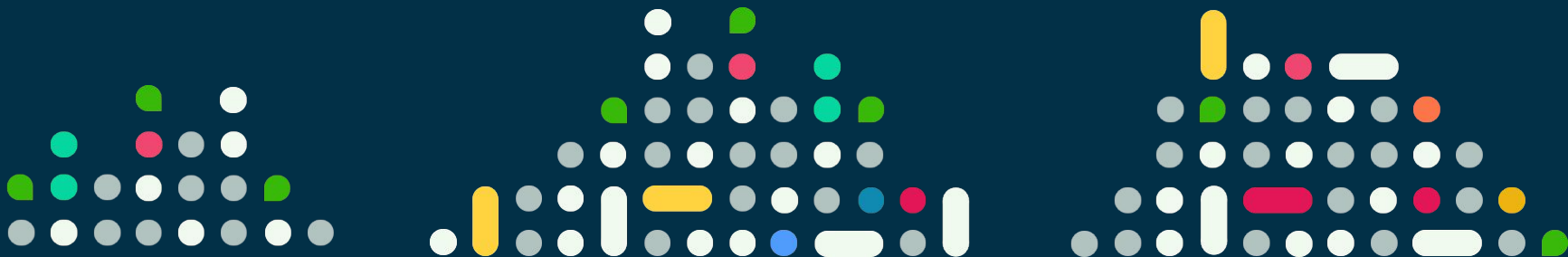
Show live stock feeds

Track the status of each processing order

Set up shipping options to suit your needs

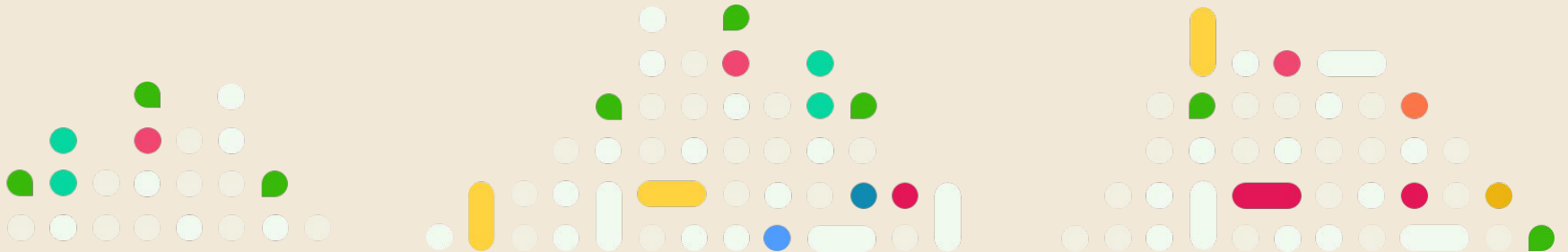
Reporting options

Step 5. Success Stories



West Arana Hills RLFC

“We find it very easy to use. We are looking into giving some training to all our committee members to start using it more.”

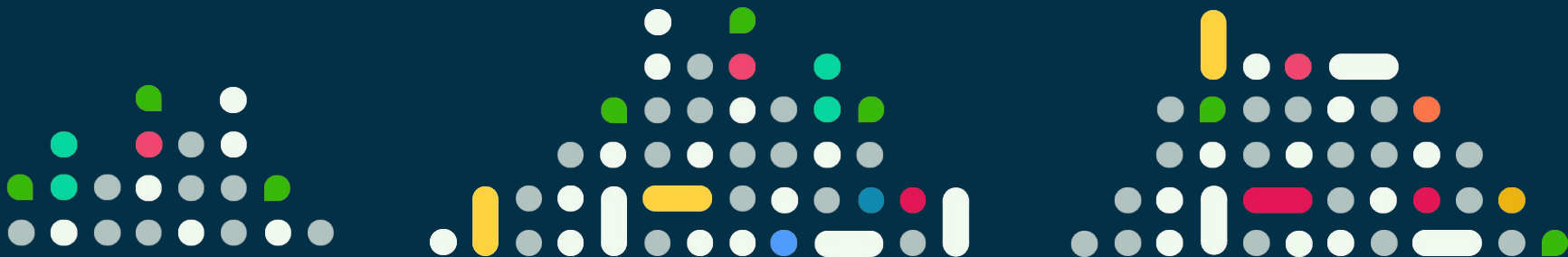


Magpies Mackay Senior Rugby League Club

“Great to have a working platform to do the majority of everything, store and share information instead of spreadsheets and onedrive. We love using the website and meetings, once we click published it’s all there. It saves us so much time”



Step 6. Resources



1

Log in regularly (like email) / Bookmark us!

2

Tick off tasks when they're done and assign to roles

3

Use 'discussion' messages to talk to QRL (instead of email)

4

Ask us for help - anytime



1 Find relevant articles via TidyHQ HelpCentre

Talk to Fin our AI Agent

support.tidyhq.com

2 Email our support team directly

support@tidyhq.com (include screenshots or screen recording)

3 Checkout our Youtube Channel + Join our Community on Facebook

[Toolkit for Clubs](#)



4

Checklist for New Committees

[Quick Guide](#)

What Is Tidy

5

[Quick Guide](#)

