SportsEngine HQ Admin Guide

Table of Contents

Introduction

SportsEngine HQ is an easy-to-use feature that houses all of your organization's administrative tools, including:

- Memberships
- Registrations
- Invoices
- Website Settings
- Billing Information, and more.

ACCESSING SPORTSENGINE HQ

1. Go to your SportsEngine website and sign in with your "Admin" account.
2. In the top-left corner, click the gray **Admin gear**.
   - You will now be on your HQ page.

Home

The Home tab gives you an overview of what's going on with your organization:

- **Registration**: See your sign-up information and progress of your most important registrations.
- **Invoicing**: How much money you've collected, and how much is still owed.
- **Program Listings**: How many times your programs were viewed on SportsEngine.com.

Members

Members showcases how many users are associated, or "connected", to your organization.

DIRECTORY

Your Member Directory is home to your organization's members. Members are added through manual creation, rostering, or as athletes and adults register.

HOW TO MANUALLY ADD A MEMBER

1. On the left-hand navigation under *Members*, click **Directory**.
2. In the top-right corner of the screen, click **Add Person**.
3. Input the member's "Name" and "Email Address" plus any optional fields.
4. Click **Add**.
   - The member you added will receive an email asking them to accept their invitation.

HOW TO REMOVE A MEMBER

Click HERE to learn more about how to update a member status to **Inactive**.

HOW TO MESSAGE MEMBERS

1. On the left-hand navigation under *Members*, click **Directory**.
2. Check the box next to the individual recipient(s).
   - Click on the **Groups and Roster** sub tab to send to a group or roster.
3. In the top-right corner, click **Message**.
4. Input a subject, type out your message, click **Send**.

HOW TO ADD A GROUP

1. On the left-hand navigation under *Members*, click **Directory**.
2. Choose the **Groups and Rosters** sub tab.
3. In the top-right corner, click **Add Group**.
4. Input the "Group Name" and update the Privacy Setting.
5. Click **Add**.
6. On the right-side, click the **three dots**.
7. Choose **Add Group Members**.
8. Type in the names of the members you want to add to the group and click **Add**.

PERMISSIONS AND NEWSLETTERS

Permissions and Newsletters is where you grant administrative permissions to your members. You can also send messages that have attachments (documents, pictures, links) from here.

NOTE: Click HERE to read more about permissions.

HOW TO ASSIGN PERMISSIONS TO MEMBERS

1. On the left-hand navigation under *Members*, click **Permissions and Newsletters**.
2. Search or use the filter to find the member you are looking for, then click on their "name".
   - If you can't find the member you are looking for, invite them to become part of your organization.
3. If there is more than one sub profile, select their profile "name" on the left-hand side.
4. On the right-side of the screen, scroll down and check the box next to the tools/pages that you would like to give this member access to.

HOW TO SEND A MESSAGE WITH AN ATTACHMENT

1. On the left-hand navigation under *Members*, click **Permissions and Newsletters**.
2. Scroll down and under *Update Quick Report* click **Send Message**.
3. Choose either **All** or **Selected**.

- **All**: Every member in your organization.
- **Selected**: Choose which member(s) you want to message.

4. Under *Editor*, choose **Page Layout**.
5. Click **Continue to Compose Message**.
6. Click **Add Page Element**.
7. Choose your elements that you would like to use.
   - Common newsletter elements are:
     - Text Block
     - Single Photo
     - Document
8. Add the element, content, and text.
9. Click **Preview and Send Message**.
10. Click **Send Message** to confirm and send.

Invoicing

Invoicing allows you to bill members that are connected to your website. Invoicing members is useful when you need to collect miscellaneous fees, such as apparel items or volunteer fees.

INVOICES

HOW TO SET UP INVOICING

1. On the left-hand navigation under *Invoicing*, click **Invoices**.
2. The next page will display a series of checklists. You will need to configure and add your bank account, then verify your processor settings.
3. Click the **Choose a Bank Account** link to select the bank account that you want Invoicing to use and click **Choose Account**.
4. Click the **Complete the Processor Settings** link to verify your processor settings.
   - Once all arrows are green, you are ready to go. Refresh the page and you will then see the Invoices window and you can begin to use it.

HOW TO SEND AN INVOICE

1. On the left-hand navigation under *Invoicing*, click **Invoices**.
   - If you haven't setup your Invoicing, please do so first.
2. In the top-right corner of the screen, click **Send Invoices**.
3. Fill out all the necessary and required fields:
   - **Recipient:** Who you are sending the Invoice to.
   - **Description:** What you are Invoicing for. Ex) Spring Player Fees, Blue XL T-Shirt, or Fundraising Fee.
   - **Message (optional):** Any additional information you would like to add.
   - **Itemize Invoice:** Break the fee down item by item.

- **Invoice Amount:** Amount you wish to Invoice your member.
- **Processing Fee:** Who pays the processing fee. Either the Organization (You) or the Recipient (Member).
- **Payment Term:** Choose the Term you want to use.

4. Click **Send Invoice**.

SALE ITEMS

Sale Items can be added to an itemized invoice. This allows a financial admin to see how many times one item has been sold. Itemized invoices can have more than one Sale Item attached to it.

HOW TO ADD SALE ITEMS

1. On the left-hand navigation under *Invoicing*, click **Sale Items.**
2. Click **Add Sale Item**.
3. Fill out the form as required/desired.
   - [Optional] If you will be creating another sale item, click **Add Another**.
4. When satisfied, click **Add Item**.

DISCOUNTS

By creating a discount, you allow users paying invoices to receive a dollar amount or a percentage off their bill.

NOTE: All discounts can be applied to any invoice.

HOW TO CREATE DISCOUNTS

1. On the left-hand navigation under *Invoicing*, click **Discounts.**
2. In the top-right corner, click **Add Discount**.
3. Enter the discount details and click **Add**.

PAYMENT TERMS

Payment Terms allow financial admins to create reusable installment plans (payment plans) when sending out invoices. Click HERE to learn more.

HOW TO ADD PAYMENT TERMS

1. On the left-hand navigation under *Invoicing*, click **Payment Terms.**
2. In the top-right corner, click **Add Payment Term**.
3. Enter a *name* (Ex: “Regular Season Fees”).
4. Enter a *description* (Ex: “5 equal payments on the 15th”).
5. Choose the number of payment installments.
6. Click **Customize** to change the installment amounts. They are equal by default.

Customizing Installment Amounts

Installment amounts are changed by clicking **Customize** from the 'Add Payment Terms' window.

- Set each installment to a percentage of the total, making sure that the installments add to 100%.
- Payment installment amounts are set as percentages so that the Payment Terms can be applied to any invoice regardless of the amount.

Installment Window

There are 3 options for settings the window of time between installments:

- **Every # days:** Payment installments are spaced out by a set number of days, starting the day the invoice is sent.
- **The # of each month:** Payment installments to be scheduled monthly for the date you set for each month, starting the first day after the invoice is sent.
- **Specific Dates:** Payment installments to be scheduled for specific dates at the time the invoice is sent. Different invoices using these Payment Terms can have different dates set.

Upfront Payments

This is the invoice amount required to be paid up front. The amount required up front is subtracted from the total amount due while the remaining amount is divided according to the Payment Terms.

Members ALWAYS have the option to pay the full amount up front regardless of payment terms.

TRANSACTIONS

This tab allows you to view and report on the transactional data which has occurred through invoicing.

To search for specific transactions, utilize the search bar and use search criteria such as "invoice descriptions" or "invoice recipient names".

NOTE: Click the blue button labeled **EXPORT** in the top-right corner to export your transaction history to a CSV file.

REPORTS

There are two different Financial Reports you can run:

- **Activity Reports:** Includes information on invoices, online/offline payments, online/offline refunds, voids, and credits.
- **Payout Reports:** Includes statement and settlement dates, online payments/refunds, tech & processing fees, payout amounts, and balance.

NOTE: Input your date range and click the blue button labeled **EXPORT** in the top-right corner to export your report history to a CSV file.

Registration

The Registration tab holds all of your registrations that you have on your SportsEngine site. From here you can view current and past registration sessions, check out your financial summaries, and request a registration.

REGISTRATIONS

Clicking Registrations shows all of your registrations, past and present, that are in your organization's SportsEngine HQ. Toggle between the different sub tabs to view different registration sessions.

- **Enabled:** Current registrations that are enabled and live.
- **Under Construction/Review:** Registrations that are still being built by the SportsEngine Registration Team or are ready for you to test.
- **Disabled:** Registrations that are not currently in use.
- **Archived:** Past registration sessions that are no longer used or needed.

HOW TO ENABLE A REGISTRATION

1. On the left-hand navigation under *Registration*, click **Registrations.**
2. Choose the **Under Construction/Review** tab, and click the URL of the registration.
3. Now that you are on the "Welcome" page of the session, on the left-side under status, click the option that says **Enable Registration**.

HOW TO VIEW/TEST A REGISTRATION SESSION

NOTE: The registration must be enabled (outlined above) before you can test it.

1. On the left-hand navigation under *Registration*, click **Registrations.**
2. Choose one of the following sub tabs.
   - **Enabled**
   - **Under Construction/Review**
   - **Disabled**
   - **Archived**
3. On the right side of the page, under the *Registration URL* column, click on the "URL link".

4. From here, you can navigate and test the registration.

FINANCIAL SUMMARY

The Financial Summary shows all financial information regarding your registrations. From this tab you can run financial reports, view registration statements, search for specific orders, view failed payments and chargebacks, and keep track of registration payment plans.

AVAILABLE REPORT TYPES

There are a few report types available to choose from:

- **Sales Report:** Contains information on all sales submitted across all registrations in the specified timeframe.
- **Order Report:** Contains information on orders submitted across all registration s in the specified timeframe.
- **Payout Report:** Contains all of the organization's bank account deposits and withdrawals across all registrations in the specified timeframe.
- **Transaction Report:** Contains data on all payments, discounts, refunds, and fees generated by registration orders across all registrations in the specified timeframe.

HOW TO RUN A FINANCIAL REPORT

1. On the left-hand navigation under *Registration*, click **Financial Summary**.
2. Under *Report Type*, choose the report you would like to run.
3. Input the "Start date" and "End date" of your report, and click **Run Report**.
   - Depending on how large or what kind of report you are generating, it could take some time to download.
   - Some reports download as CSV files while others get sent to your email to view.

HOW TO VIEW FINANCIAL STATEMENTS

1. On the left-hand navigation under *Registration*, click **Financial Summary**.
2. On the top menu bar, click **Statements**.
3. Click the "title" of the registration.
4. To export your financial data, choose the option on the top-right that says **Export Transactions**.

HOW TO SEARCH FOR A SPECIFIC REGISTRATION ORDER

1. On the left-hand navigation under *Registration*, click **Financial Summary**.
2. Choose **Orders**, then select **Search Orders**.
3. Type in "Nam"e and "Date", or search by the "Order Number".
4. Click **Search**.

HOW TO VIEW FAILED REGISTRATION PAYMENTS
Payments fail for a number of reasons. The most common are because a registrants credit card get's cancelled, expires, or has reached its credit limit.

1. On the left-hand navigation under *Registration*, click **Financial Summary**.
2. Click on the **Failed Payments** tab.
3. Click the "order number" to view the payment in more depth, or click on **Make Payment** to manually make a payment on behalf of the registrant.

HOW TO VIEW CHARGEBACKS
NOTE: Click HERE to learn more about chargebacks.

1. On the left-hand navigation under *Registration*, click **Financial Summary**.
2. Under the *Financial Summary* header, click **Chargebacks**.
3. Under the *Order Number* column, click one of the "order numbers" to view the chargeback.

RECURRING PAYMETNS
This sub tab focuses on all registration fees that have payment plans or paywall subscriptions associated to them. This tab gives you some insight as to what your total registration fees add up to (forecast) as well as what fees haven't been paid yet (outstanding).

REQUEST
Here is where you request a registration build from the SportsEngine Registration Team. After completing the Registration Request Form, our team builds your session for you within 5-business days - or within 2 if you elect for the expedited option.

Competition
This tab is where all of your League, Club, Division, and Team information is located, as well as where you can easily roster your teams and upload game schedules.

SPORT MANAGEMENT
This tab gives you an overview of all and any Teams, Divisions, Clubs, or Leagues that you have on your website.

HOW TO VIEW ALL TEAMS
1. On the left-hand navigation under *Competition*, click **Sport Management**.
2. Click the **Teams** sub tab.
3. Filter by a **Club/League**.

4. Filter by a **Season** and **Subseason**.

ROSTERING

After you add your Team Pages to your site and your athletes have been registered, you will roster them to their teams.

HOW TO ROSTER

Using Filters to Find Players and Staff

1. On the left-hand navigation under *Competition*, click **Rostering**.
2. Under *Rostering*, choose either the **Assign Players** or the **Assign Staff** tab.
3. Under *Select a registration to manage people within,* choose a "Registration session".
   - The Registration session must be enabled to pull players/staff from.
4. Click **Filter** and use "Keywords", "Birthdate Range", "Gender", "Rostered Status", or "Team" as filters
5. Click **Apply Filters** to see your results.

Use Filters to Find Teams

1. On the right-hand side, click **Filter** from the Teams column.
2. Select a "League/Season/Subseason/Division" to pull teams from.
3. Use "Gender", "Team", and "Keywords" as advanced filters if needed.
4. Click **Apply Filters** to see your results.

Roster Players and Staff

1. Check the box next to the player(s) or coach(es) name.
2. Click, drag, and drop the players/coaches over to their team.

SCHEDULE UPLOAD

The SportsEngine Schedule Upload feature allows you to mass import events and games into your League, Club, Division, and Team Pages.

Click HERE to view an in-depth guide on how to use the Schedule Upload tool.

Promotion

SPORTSENGINE.COM LISTINGS

Adding a Program listing to SportsEngine.com allows for users to search for your organization when browsing for a sport to get involved in.

HOW TO ADD A PROGRAM

1. On the left-hand navigation under *Promotion*, click **SportsEngine.com Listings**.
2. Click **Add Program**.
3. Input your program details and click **Publish**.
    - The Listing will now be advertised on SportsEngine.com for the public to find.

NOTE: Click HERE to read more about program listing best practices.

MARKETPLACE

Click HERE to learn more about how SportsEngine Marketplace can help your sports organization grow.

CUSTOM APPAREL

Click HERE to learn more about how you can get started with your own team apparel store.

Website

WEBSITE TOOLS

Website Tools displays the handy resources we offer on the SportsEngine platform. Two most commonly used tools are **Content Templates** and **Variables**.

- **Content Templates:** Reusable page layouts which house a number of page elements. These are useful when you have a League with a large number of Team Pages that should all share the same information, or in-depth newsletters with social media links that should be added to each email.
    - **NOTE:** Click HERE to learn more about how to add templates.
- **Variables:** Used when adding more player and staff information to a roster on a Team Page such as “height”, “weight”, or “grade”.
    - **NOTE:** Click HERE to learn more about how to create variables.

WEBSITE SETTINGS

Website Settings is where you update your site information, set default tags, add iCal Feeds, change your site’s look, and more.

- **Information:** Change your site information, such as site name, short name, and a brief description.
- **Set Default Tags:** Setting default tags automatically shows certain Events and Games that are specific to a certain tag (page) on your website to your users

the first time they go to your Calendar Page.
    - **NOTE:** Click HERE to learn more about Default Tags.
- **Add iCal Feed:** Allows you to add an external calendar feed to your SportsEngine site.
    - **NOTE:** Click HERE to learn more about iCal Feeds.
- **Theme Settings:** Changing your site color, background, banners, and logos.
    - **NOTE:** Click HERE for an in-depth guide to your Sitebuilder product.

Safety

The Safety tab displays all of your background screening registrations that you have on your site.

If you would like to learn more about how you can better protect the athletes in your organization, please reach out to our Sales Team at sales@sportsengine.com or by phone at 1-888-379-1035.

Settings

Settings is where you enter bank account information, set up processor settings, and change your organization information.

ORGANIZATION SETTINGS

HOW TO SETUP PROCESSOR SETTINGS

In order to show the "Organization Name" on the registrants credit card statements and process refunds, you must set up your processor settings.

1. On the left-hand navigation under *Settings,* choose **Organization Settings**.
2. Choose the **Processor Settings** sub tab.
3. Click **Add Processor Settings**.
4. Input all necessary and mandatory information, then click **Submit for Approval**.

HOW TO ADD A BANK ACCOUNT

You need to set up a bank account prior to receiving deposits for online payments through SportsEngine's Registrations or Invoicing.

1. On the left-hand navigation under *Settings,* choose **Organization Settings**.
2. Click on the **Bank Accounts** sub tab.
3. In the top-right corner, click **Add Bank Account**.
4. Input all necessary and mandatory information, then click **Save**.

ACCOUNT

HOW TO PAY MY SPORTSENGINE SITE BILL

1. On the left-hand navigation under *Settings,* choose **Account**.
2. In the middle of your screen, next to the invoice, click on the option that says **Pay Now**.
3. Either use a payment method already in the system or choose **New Payment Method**.
4. After you have chosen your payment method, click **Pay Now**.

HOW TO MANAGE MY BILLING CONTACT

1. On the left-hand navigation under *Settings,* choose **Account**.
2. Under *We summarized your account info*, click on **Manage Billing Contacts**.
3. Either click **Add New Contact** or choose **Edit** to update an existing contact.
    - If you added a new contact, input all necessary and mandatory fields and click **Save Changes**.
    - If you edited an already existing contact, update the contact information and click **Save Changes**.

HOW TO CHANGE MY BILLING PAYMENT METHOD

1. On the left-hand navigation under *Settings,* choose **Account**.
2. Under *These are your default payment settings*, click on **Manage Payment Methods**.
3. Click **Add Payment Method** and input all necessary and mandatory information, then click **Save Changes**.
    - If you want to make your new payment method the default on your site, click **Set as Default**.