

# sport**se**ngine



## Registration Guide



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## Introduction

This guide will walk you through all the essentials when it comes to using the SportsEngine Registration product. From requesting a monetary registration to rostering your registered athletes, this manual will steer your organization administrators in the right direction.

### REGISTRATION TYPES

- **Monetary Registration:** A registration that is collecting fees from your registrants. *SportsEngine must build your monetary registration for you.*
- **Non-Monetary Registration:** A registration that is not collecting fees from your registrants. *You do not need to have SportsEngine build a non-monetary registration.*
- **Registration Builder Access:** The ability and access to build your own monetary registrations. *You must reach out to your Account Manager to inquire about this access.*

### REGISTRATION SETUP

#### HOW TO REQUEST A MONETARY REGISTRATION

1. Sign in and click on the **Admin gear** located at the top of your screen.
2. Once in “SportsEngine HQ”, click the **Registration** tab then choose **Request**.
3. Fill out the Registration Request Form and click **Submit**.

#### HOW TO BUILD YOUR OWN NON-MONETARY REGISTRATION

Click [HERE](#) to learn more about how you can create your own non-monetary registration.

#### HOW DO I BUILD MY OWN MONETARY REGISTRATION?

You must have “Registration Builder Access” on your SportsEngine account. If you already have access, click [HERE](#) to learn how to build your own monetary registrations.

If you do not have Registration Builder Access, *please reach out to your Account Manager to inquire about that access.*

### TESTING THE REGISTRATION

After the registration has been created, it is always best practice to test the registration to see how it works before sending it out to your registrants.



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## HOW TO TEST A REGISTRATION SESSION

1. Sign in and click on the **Admin gear** located at the top of your screen.
2. Once in “SportsEngine HQ”, click the **Registration** tab then choose **Registrations**.
3. Choose the **Under Construction/Review** tab, and click the URL of the registration.
4. Now that you are on the welcome page of the session, on the left side under *status*, click the option that says **Enable Registration**.
  - You must enable the registration before testing it.
5. Make sure that all the information is correct then scroll down and click **Enable Registration**.
  - If you need edits made to your registration session, please [start a conversation](#) with our Customer Success Team.
6. Once enabled, on the top-right corner click into **User Mode**.
7. Click **Continue** at the bottom of the page and continue through all pages of your registration to ensure accuracy.
8. Once you get to the review page of the session, choose the option to **Delete Entry**. This will ensure that you do not accidentally go all the way through and pay.

## EDITING A REGISTRATION

**NOTE:** If you’ve built a non-monetary registration or have “Registration Builder Access”, you are able to edit and update any part of your session at any time.

You may be limited to what you can and cannot edit depending on what kind of access you have and what type of registration you are trying to change.

Administrators without “Registration Builder Access” that want to edit a monetary registration can update the following:

- Update and Change Text Blocks
- Disable and Enable Registration Options
- Update and Change Inventory Levels

## HOW TO UPDATE A TEXT BLOCK IN YOUR REGISTRATION

1. Sign in and click on the **Admin gear** located at the top of your screen.
2. Once in “SportsEngine HQ”, click on the **Registration** tab then choose **Registrations**.
3. On the far right side of the page, click on the registration URL.
4. Go to the text block on the registration that needs editing.
  - Make sure you click into **Edit Mode** if you are on the welcome or receipt pages, and **Preview/Review Mode** while on any other page.
5. Click on the gray **Gear** icon in the top-right corner of the text block and click **Edit**.



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6. Update your text.
7. Scroll down and click **Save Changes**.

## HOW TO DISABLE AND ENABLE REGISTRATION OPTIONS

**NOTE:** You will only be able to disable or enable registration options that are associated with a checkbox or radio style question.

1. Sign in and click on the **Admin gear** located at the top of your screen.
2. Once in “SportsEngine HQ”, click on the **Registration** tab then choose **Registrations**.
3. On the far right side of the page, click on the registration URL.
4. Go to the question on the registration that needs editing.
  - Make sure you click into **Edit Mode** if you are on the welcome or receipt pages, and **Preview/Review Mode** while on any other page.
5. Under the question, click the option to either **Disable** or **Enable** depending on what the status is already.

## HOW TO UPDATE INVENTORY ON A REGISTRATION

**NOTE:** You will only be able to update inventory on a store item that already has inventory.

1. Sign in and click on the **Admin gear** located at the top of your screen.
2. Once in “SportsEngine HQ”, click on the **Registration** tab then choose **Registrations**.
3. On the far right side of the page, click on the registration URL.
4. Go to the question on the registration that needs editing.
  - Make sure you click into **Edit Mode** if you are on the welcome or receipt pages, and **Preview/Review Mode** while on any other page.
5. Next to the store item amount, you will see a box with the remaining inventory in it.
6. Input a new number for the inventory and click **Update Max Inventory**.

## ENABLING AND SHARING YOUR REGISTRATION

### HOW TO ENABLE YOUR REGISTRATION

**NOTE:** Once a session is enabled and registrants have gone through, you will be limited to the changes that can be made. *Please review your registration before enabling.*

1. Sign in and click on the **Admin gear** located at the top of your screen.
2. Once in “SportsEngine HQ”, click the **Registration** tab then choose **Registrations**.
3. Choose the **Under Construction/Review** tab, and click the URL of the registration.
  - Clicking on the URL link will bring you to the welcome page of the registration.



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4. On the left side under *status*, click the option that says **Enable Registration**.

## HOW TO POST YOUR REGISTRATION LINK TO YOUR SPORTSENGINE SITE

1. Sign in and turn on [Edit Mode](#).
2. Go to the page you want your registration placed on.
3. Click **Add Page Element**.
4. Scroll down and choose the **Registration Link** page element.
5. Choose the registration session that you would like to post.
  - The session must be enabled for you to do this.
6. Click **Create This Page Element**.

## HOW TO SEND YOUR REGISTRATION LINK VIA EMAIL

1. Sign in and in the top-left corner of your screen, click the gray **Admin** gear.
2. Once in “SportsEngine HQ”, click the **Registration** tab then choose **Registrations**.
3. Choose the **Enabled** tab, and click the “title” of the registration.
4. On the right side, click the option that says **Get Registration Link**.
5. *Copy* that registration URL link.
6. *Paste* the registration URL link in a message to your members.

## REGISTRATION REPORTING

There are two types of Registration reports you can view:

- **Quick Report:** A snapshot of information to quickly look up and use. You can run a Quick Report, save it, and then turn it into a Saved Report.
- **Saved Report:** A report that you can save so the information within the report will dynamically load as registrants register.

## HOW TO CREATE A REGISTRATION REPORT

1. Sign in and click on the **Admin gear** located at the top of your screen.
2. Once in “SportsEngine HQ”, click the **Registration** tab then choose **Registrations**.
3. Click on the “title” of the registration you would like to pull data from.
4. Scroll down and choose either **Quick Reports** or **Saved Reports**.
5. Expand the **Fields** section and in each section select which fields to include in the report.
  - Fields allow you to quickly choose general fields that you wish to display as report column headers.
6. Expand the **Filters** section and set any filtering you want to add by selecting **Add a Rule**.
  - Filters allow you to add rules to display results that match the specific conditions you set.
7. Expand the **Sort** section to sort the report if needed.
8. Select **Update Quick Report** or **Save and Update**.



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## SMART GROUPS

Smart Groups allow you to easily group together and communicate with a certain portion of your registrants – either by team, division, level of play, etc.

### HOW TO CREATE A SMART GROUP

1. Sign in and click on the **Admin gear** located at the top of your screen.
2. Once in “SportsEngine HQ”, click **Registration** then choose **Registrations**.
3. Click on the “title” of the registration you want to create a group in.
4. Create a Saved Report (outlined above).
5. In the top-right portion of the saved report, click **Create Smart Group**.
6. Name the group and click **Create Smart Group**.

## FINANCIAL REPORTING

### HOW TO RUN REGISTRATION FINANCIAL REPORTS

1. Sign in and click on the **Admin gear** located at the top of your screen.
2. Once in “SportsEngine HQ”, click on the **Registration** tab then choose **Financial Summary**.
3. Under *Report Type*, choose the report type you would like to run.
  - **Sales Report:** Contains information on all sales submitted across all registrations in the specified timeframe.
  - **Order Report:** Contains information on orders submitted across all registrations 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.
4. Input the start date and end date of your report, then 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.

## REFUNDS

**NOTE:** Only organization admins will be able to process a refund. SportsEngine will not be able to process a refund on behalf of an organization or for an organization’s member at any time.

- If a full refund is processed the transaction fees will also be refunded.





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- When you use your own merchant account (ex: USA Epay), the refunds process through the merchant, not through SportsEngine.
- Refunds are made back to the original payment source (card, bank account, etc).
- Refunds can take up to 3 days to process.
- Full or partial refunds can be processed on registration order.

## HOW TO ISSUE A REFUND

1. Sign in and click on the **Admin gear** located at the top of your screen.
2. Once in “SportsEngine HQ”, click on the **Registration** tab then choose **Registrations**.
3. Search for the registration that user is in.
4. Click on the “name” of that session.
5. Run a report (outlined above) to find the individual you need to refund.
6. Click on the **Order** of that registrant.
7. Scroll down under *Transactions*, then click the option that says **View/Refund**.
8. Choose either **Full** or **Partial Refund** (*partial refunds are only available 36 hours after the transaction was placed.*)
9. Choose **Issue Refund**.

## RELATED INFORMATION

### HOW AN ADMIN CAN REGISTER AN ATHLETE ON THEIR BEHALF

**NOTE:** If a registrant is having difficulties registering themselves, follow the steps below to register someone as **A Person Unconnected to My Account**.

1. Sign in and click on the **Admin gear** located at the top of your screen.
2. Once in “SportsEngine HQ”, click on the **Registration** tab then choose **Registrations**.
3. Click on the registration URL you are trying to register someone on.
  - The registration must be enabled (outlined above) before you can register someone.
4. On the welcome page of the registration, in the top-right corner, click into **User Mode**.
5. Scroll down and click **Continue**.
6. On the Who Are You Registering page, choose the option that says **A Person (or Team) Unconnected to My Account**.
7. Go through the registration and answer all the questions on behalf of the registrant.
  - If the registration collects payments, you will see the option to Pay Offline (Admin Only) on the shopping cart page.



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## HOW TO CREATE DISCOUNT CODES

**NOTE:** Your registrants will not be able to use a discount code after they have finished registering. They must use the discount code during the registration process.

1. Sign in and click on the **Admin gear** located at the top of your screen.
2. Once in “SportsEngine HQ”, click on the **Registration** tab then choose **Registrations**.
3. Click on the “title” of the registration.
4. Scroll down and select the **Discounts** sub tab.
  - The registration must have store items enabled in order to create discount codes.
5. Click **Add Discount Code**.
6. Choose either a **Single Usage** or **Multi Usage** discount code.
  - **Multi Usage:** A code that can be used multiple times.
  - **Single Usage:** A code that will be generated by the platform that can only be used on one registration order.
7. Input all necessary and mandatory fields including the Discount Type (percentage or dollar amount) and then select which store items the code should apply to.
8. Click **Create Discount Code**.
  - The registrant will see a spot on the shopping cart page of the registration where they can add the code.

**Helpful Tip!** The registrant will see a spot on the shopping cart page of the registration where they can add the code.

## HOW TO CHANGE THE STATUS OF A REGISTRATION SESSION

There are three statuses that you can set your registration to:

- **Disabled:** Use this when you want to turn off the registration and you don’t want users to access it.
- **Enabled:** Use this status when you want to turn your registration on to start collecting payments.
- **Archived:** Once you’re done with your registration, set the session to this status to clean up your registration list.

1. Sign in and click on the **Admin gear** located at the top of your screen.
2. Once in “SportsEngine HQ”, click the **Registration** tab and choose **Registrations**.
3. On the right side of the screen, click on the registration URL.
4. On the top-left portion of the session under *Status*, click **Edit Registration**.
5. *Check* the box next to the status you want to change the registration to.
6. Scroll down and click **Save Registration**.