US Club Soccer Rec Staff SportsEngine HQ Guide

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Introduction

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

- The US Club Soccer National Registration System
- Memberships
- Players and Staff Information
- Registrations
- Program Listings

ACCESSING SPORTSENGINE HQ

1. Go to USClubSoccer.org.
2. Scroll to the bottom of the page.
3. On the right side, click **Log in**.
4. Enter your admin email address and password.
5. Click **Sign In**.
6. Once you are logged in, scroll to the top of the page.
7. On the top-right of the page, click **My Organizations**.
8. Choose the name of your Club.
   - You will now be on your HQ page.

Home

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

- **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

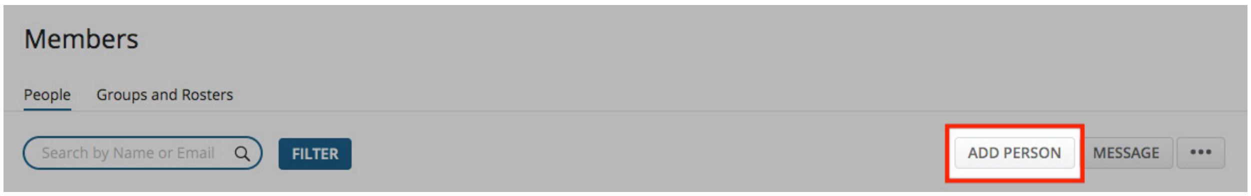
Your Member Directory is home to your organization's Members. Members are added into the US Club National Registration System, or through manual entry.

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. Caution: The same person can be added multiple times. Make sure they don't

already have an existing profile before creating a new one.

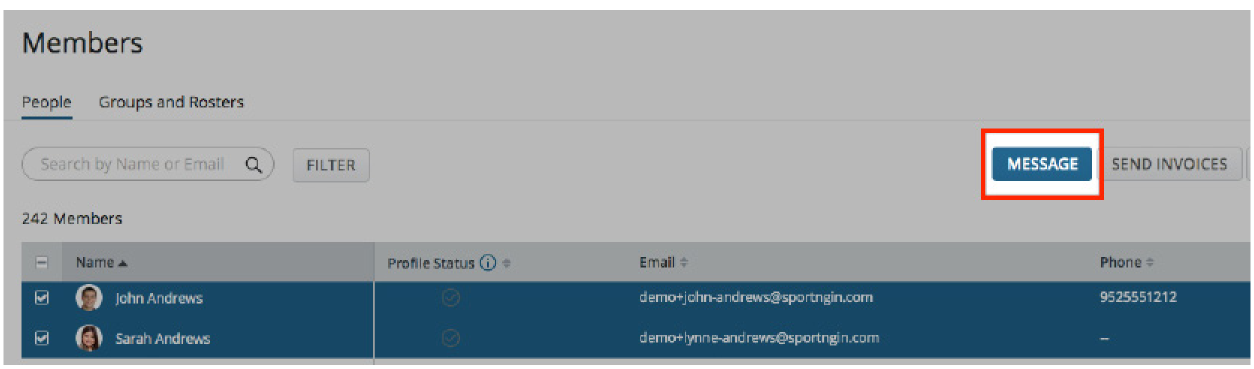
5. Click **Add**.
    - The member you added will receive an email asking them to accept their invitation.



NOTE: Manually adding a member will not buy a membership. You can also add members through Governing Seasons to specific teams within the Governing Season.

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.
9. Click **Add**.

HOW TO GRANT MEMBERS ORGANIZATIONAL PERMISSIONS

1. On the left-hand navigation under *Members*, click **Directory**.
2. Click on the name of the member you are trying to grant permissions to.
   - Add the member first if they don't exist (outlined above).
3. Choose the **Roles** sub tab.
4. Under the *Organizational Roles* heading, click **Assign Role**.
5. Under *Select* Role, choose **Organization Administrator**, **Governing Season Admin**, or **Governing Season View Only**.
   - Org Admins will have complete access to SportsEngine HQ. Governing Season Admin will have limited access through the Governing Season. Governing Season View Only will have view-only access to the Governing Seasons subtab within the US Club Soccer tab.
6. Click **Save**.

US Club Soccer

The US Club Soccer tab will be the new home for the US Club Soccer National Registration System.

GOVERNING SEASONS

These are the seasons available with US Club Soccer. This is where you submit rosters, assign teams to Leagues, purchase Memberships, and more through the US Club National Registration System.

NOTE: Click HERE to view a first-time user experience guide that will take you through your club roster submission process.

Rec staff registration will take place in the National Registration System (NRS), starting with the 2020-21 Governing Season.

SUBMIT REC STAFF TEAMS INTO THE NATIONAL REGISTRATION SYSTEM

1. Sign in and navigate to "SportsEngine HQ."
2. In the left-hand navigation, click **US Club Soccer > Governing Seasons.**
3. Click **Get Started** in the *"July 1, 2020 - July 31, 2021 Governing Season."*
4. Click **Get Started** on the *Governing Season Roster Submission* overview page laying out the three steps of the NRS.
5. Answer yes or no to "Do you use SportsEngine Team Management Software?
   - Click **Yes**, if you are using SportsEngine Team Management Software (i.e., mobile app, team pages, or website) to utilize SE SYNC.
   - Click **No**, If you are only utilizing SportsEngine to Submit Rosters into the NRS for US Club Soccer

6. If you answered no, select from one of the following; Import Teams, Manually Add teams or **Copy Teams** (copy teams will be available for rec staff next season).
7. Follow the prompts to "Add People and Teams."
   - Submit team(s) comprised only of rec staff (no players).
   - Name your teams "[Your Club Name] - Rec Staff."
8. Click **Let's Assign Teams.**
9. Assign Teams to the *"Rec Staff Pool"* division.
10. Click, drag, and drop the teams in the left column under their correct division under the right column. When finished, click Next.
11. Click **Let's Find Leagues.**
12. [Optional] Click, drag, and drop your teams from the left side column over to their respected league under the right side column, like we did in step 8.
13. Click **Next.**
14. Review Player and Staff data.
15. Click **Next** on the bottom of the next two pages.
16. Click **Close** to finish the process.

NOTE: After completing this process, US Club Soccer is notified to approve or deny the rosters you have submitted to their league.

PURCHASE MEMBERSHIPS FOR THE REC STAFF:

1. Sign in and go to "SportsEngine HQ."
2. On the left-hand navigation, click **US Club Soccer > Governing Seasons.**
3. Under the Governing Season, click the **Teams** tab.
4. Under the *Actions* column, click **Buy Memberships.**
5. Complete the membership purchasing process.
   - The system will automatically assign the correct membership to each individual. If a Rec Staff member already has a membership purchased it will automatically be removed from the order.
6. Once complete, the Rec Staff Members will be submitted.
7. A Welcome/Eligibility Requirement email is automatically generated and sent to the staff member advising them of their next steps.
8. Once staff members have been submitted, please monitor their eligibility status to ensure they can participate in the season.

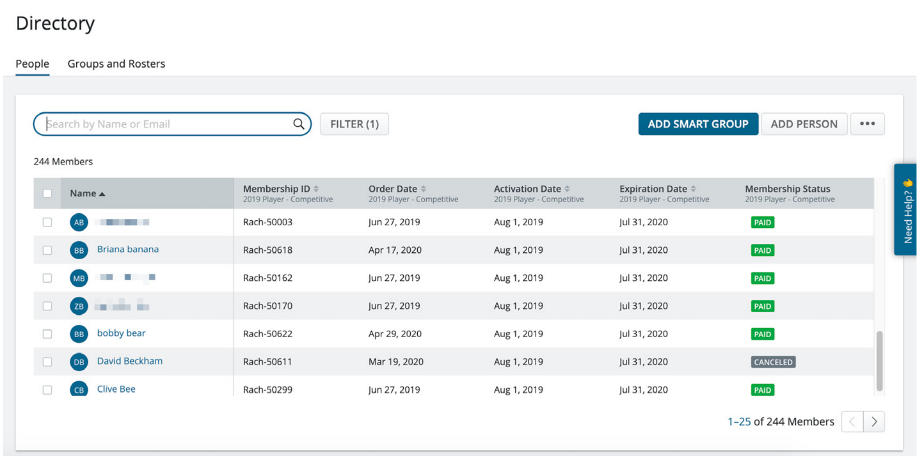
Within the National Registration System (NRS), powered by SportsEngine, outstanding requirements will be automatically emailed to the person for whom a staff membership is purchased. They will also be accessible via one's SportsEngine User Profile.

Completion will automatically be reflected within the user's profile and therefore update their eligibility status.

MEMBERSHIPS

The focus of the Memberships tab is to highlight the status of each membership on your site. Membership statuses include:

- Paid - Membership is legitimate.
- Pending - Membership has yet to be confirmed.
- Expired - Membership is closed.
- Canceled - Membership is no longer applied to the user.



HOW TO FILTER BY MEMBERSHIP STATUS

1. On the left-hand navigation under **US Club Soccer**, click **Memberships**.
2. Find the desired membership and choose the **three dots** > **View Members**.
3. Next to the search bar choose **Filter**.
4. Filter by **Membership**.
5. Choose the desired membership you would like to view.
6. Filter by **Membership**, select **Membership Status**, select **Is** or **Is Not**, and then choose the status you would like to filter by; *Paid*, *Pending*, *Expired*, or *Canceled*.
7. Once filters are set choose **Done**.

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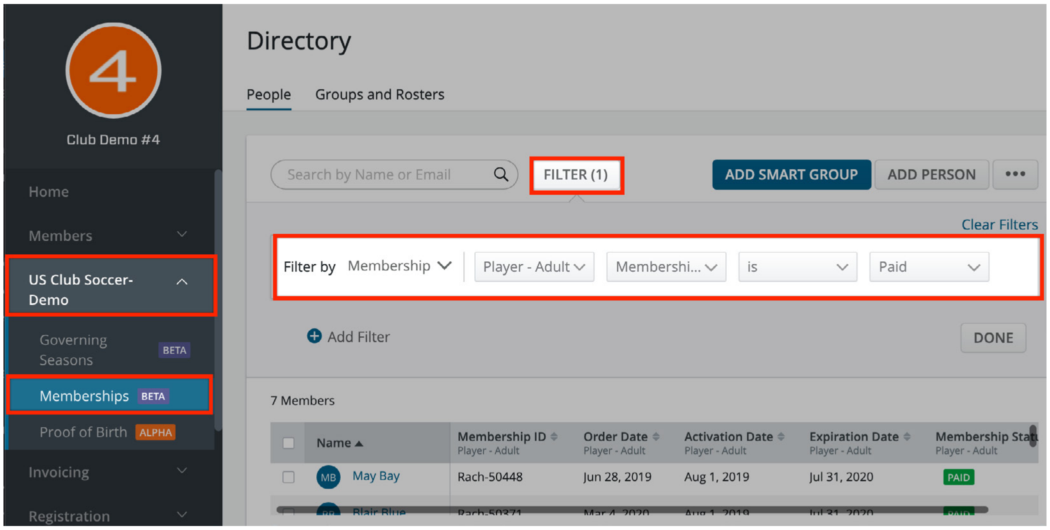
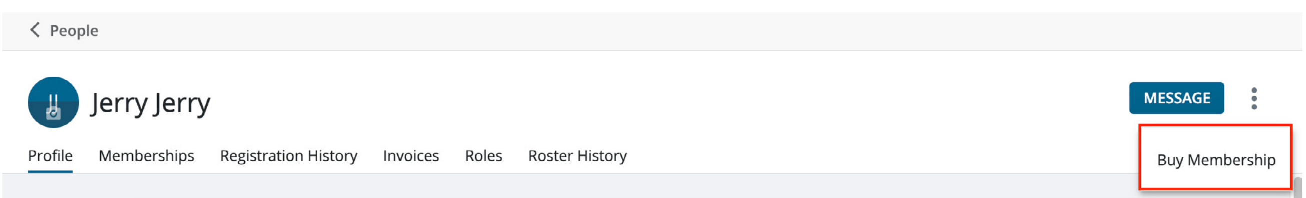


HOW TO PURCHASE A MEMBERSHIP FOR AN INDIVIDUAL

1. On the left-hand navigation under *US Club Soccer*, click **Memberships**.
2. Choose the desired Membership you would like to purchase.
3. Filter as desired to find the member that will be purchasing the Membership (outlined above).
4. Click on the "Name" of the member.
5. In the top-right corner, click the **three dots** > **Buy Membership**.
6. Click **Review Order** to go through the membership purchasing steps.

NOTE: Filters can be used to find members efficiently, they are not required for use.



HOW TO SEND ELIGIBILITY REMINDERS TO MEMBERS

1. Under the *Memberships* tab, on the right side of the screen, click the link that reads **View Ineligible**.
2. This will bring up a page that will list all ineligible members.
3. Click on the member's name to access the eligibility requirements flyout
   - Dependent on what eligibility requirements are needed determines if a reminder should be sent.
4. Click on the 3 dots on the right side of the flyout and click **Send Reminder** if applicable.

Invoicing

Invoicing Members is useful when you need to collect miscellaneous fees, such as apparel items or volunteer fees.

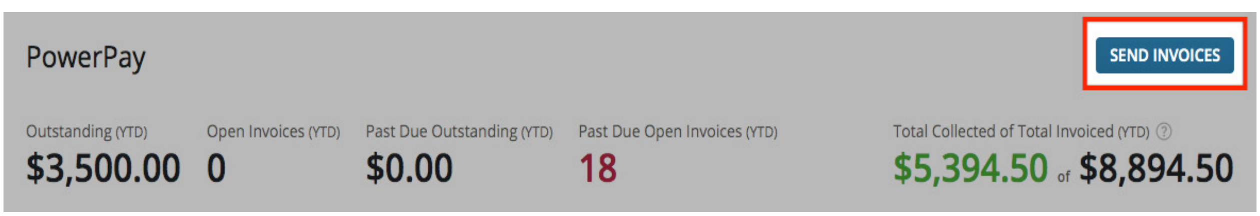
INVOICES

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 down the fee 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, select **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
7. Click **Add**.

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.

- **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 that must be paid at the time of registration. The upfront payment is subtracted from the amount total, and the remaining balance 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 is where you view and report on transactional data from invoices.

Use the search bar to find specific transactions, such as “invoice descriptions” or “invoice recipient names.”

NOTE: You can export a CSV of your transaction history, by clicking the blue **EXPORT** button on the top-right corner.

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

SportsEngine Registration eases the administrative burden when it comes to registering athletes. The Registration tab highlights all of the benefits of using SportsEngine Registration.

These are the benefits of using SportsEngine Registration:

- **Online Registrations** - collect registrant information online! Your registrants will be able to sign up at their convenience, and you won't need to worry about collecting and keeping track of paper registrations.
- **Tailored Registration Sessions** - choose what information you collect, and when. Your registration can be fully customized to your organizations needs.
- **Secure Online Payments** - collect online registration fees using Visa, MasterCard, Discover, and checking accounts.
- **Financial Tracking** - recording payments has never been easier.
- **Registrant Reporting** - create custom reports that helps you keep track of your registrants data.

We know that being a registrar is a lot of hard work, and we understand your needs. Let's make this season the best one yet.
Reach out to our Sales Team at sales@sportsengine.com or by phone at 1-888-379-1035 to get started.

Competition

After registration is over, give SportsEngine's Competition products a shot. We can help you create rosters, manage your league, teams and tournaments, so you can focus your energy on your players and volunteers.

Reach out to our Sales Team at sales@sportsengine.com or by phone at 1-888-379-1035 to get started.

Promotion

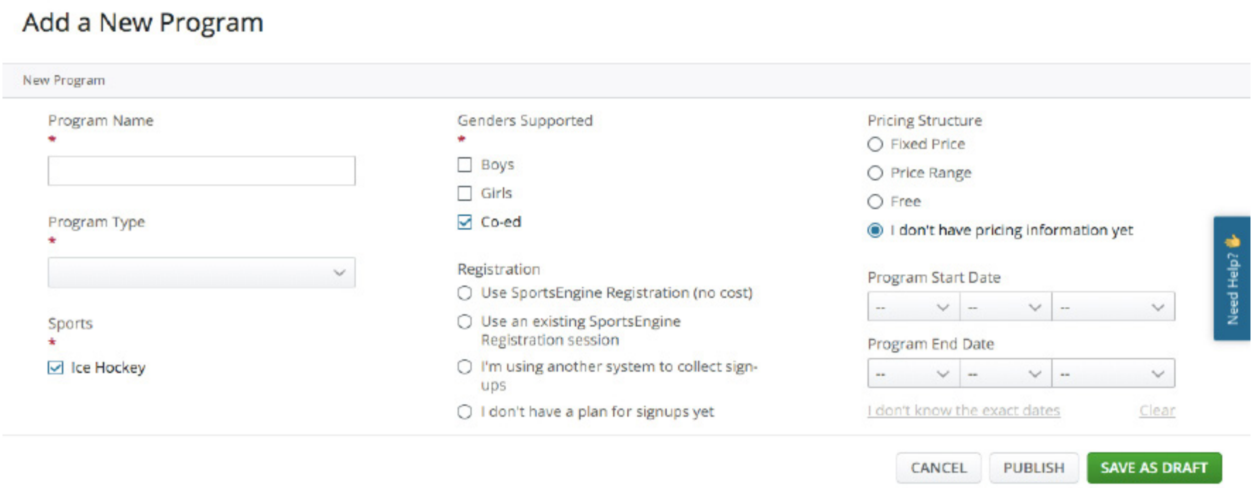
SPORTSENGINE.COM LISTINGS

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

A SportsEngine Website is the perfect way to keep your information in one place. As a webmaster, you can easily edit your website to keep your members in the loop.

SportsEngine websites are fully responsive - they'll look great no matter what device your visitors use. You can also limit the content that is shown to visitors by enabling individual permissions.

An easy to manage, professional-looking website is a great way to attract new members to your organization. Feel free to reach out to our Sales Team for more information at sales@sportsengine.com or by phone at 1-888-379-1035.

Safety

The National Center for Safety Initiatives (NCSI) and SportsEngine are pleased to offer you "Gold Standard" background screenings and abuse prevention services.

Let us help you keep your athletes safe. To learn more, please reach out to our Sales Team at sales@sportsengine.com or by phone at 1-888-379-1035.

Settings

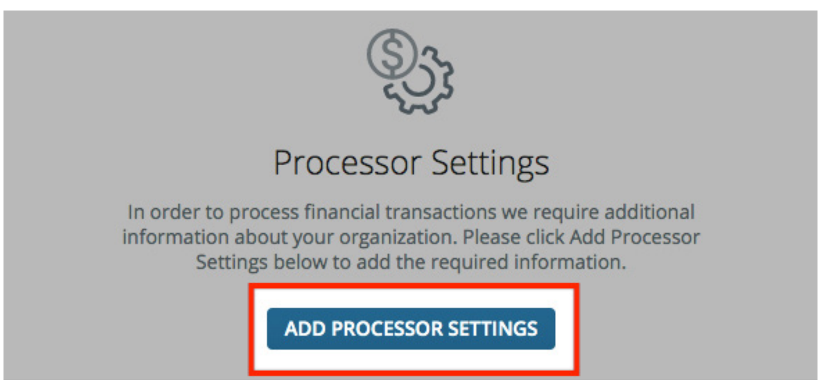
Settings is where you enter bank account information, set up processor settings, and change your organization information.

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,* click **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**.