

sport**se**ngine



Program Disruption Resource Guide



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Messaging and Communication

As an organization, you can make sure all of your participants are kept informed of the actions taken by your organization during uncertain times. Reminder, you can use SportsEngine to keep an open dialogue with admins, staff, coaches, parents, and your community.

HOW TO SEND MASS COMMUNICATIONS

FROM THE MEMBER DIRECTORY:

You can send messages to an individual member, a selected group of members, a group, or a roster.

Note: If you would like to compose a message with pictures, social media links, videos, document attachments, PDFs, etc, please send the message as a Newsletter.

1. Sign in and navigate to SportsEngine HQ.
2. Click the **Members** tab then choose **Directory**.
3. Use the search bar to find certain members.
4. Check the box next to the individual recipient(s) you want to send a message to.
5. In the top-right corner, click **Message**.
6. Input a subject, type out your message, and click **Send**.

FROM PERMISSIONS AND NEWSLETTERS:

You can send a “newsletter” style or information with attachments to an individual member, a selected group of members, a group, or a roster.

1. Sign in and navigate to SportsEngine HQ.
2. Click the **Members** tab then choose **Permissions and Newsletters**.
3. Click **Send Message** located above the member table.
4. Choose either All or Selected.
 - **All:** Every member in that group.
 - **Selected:** Choose which member in the group you want to send the message to.
5. If you chose “selected”, search for those individual profiles by name to add them to the message. Once the rostered members are added, click **Select Members**.
6. Next to the Editor selector, choose your formatting style:
 - **Plain Text:** No formatting.
 - **Rich Text:** Able to change size, color, and other text formatting options.
 - **Page Layout:** Able to add a created template and/or page element to attach



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documents.

Choosing *Plain Text* or *Rich Text*:

- Input your subject and body of the message > Send Message.

Choosing *Page Layout*:

- (Optional) Choose a “Top Template” or “Bottom Template”, then input your subject line.
 - Click **Continue** to Compose Message.
 - This will bring you to a new screen.
 - Click **Add Page Element**.
 - Choose the element you would like to use.
 - Repeat steps 3 & 4 as many times as needed.
7. Click **Preview & Send Message**.
 8. Click **Send Message**.

HOW TO CREATE A GROUP

1. Sign in and go to “SportsEngine HQ.”
2. From the left navigation menu, click on **Members > Directory**.
3. Click the **Groups and Rosters** sub tab.
4. Click the “name” of the group you want to message.
5. In the top-right corner, click **Message**.
6. Input your message and click **Send**.

HOW TO CREATE A SMART GROUP

1. Sign in and go to “SportsEngine HQ.”
2. From the left navigation menu, click on **Members > Directory**.
3. Choose the blue **Filter** button.
4. Filter by a *Registration, SportsEngine profiles, or a Team Roster*.
5. Choose your data or source, then finish your filter selections. In the top-right corner, click **Message**.
6. Click **Done**.
7. A finalized list of your members will appear.
8. Click **Add Smart Group**.
9. Name the group and click **Add**.

HOW TO MESSAGE A GROUP

1. Sign in and go to “SportsEngine HQ.”
2. From the left navigation menu, click on **Members > Directory**.
3. Click the **Groups and Rosters** sub tab.
4. Click the “name” of the group you want to message.
5. In the top-right corner, click **Message**.
6. Input your message and click **Send**.



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Rescheduling and Cancellations

Due to uncertainty you have the ability to reschedule and/or cancel games, practices and events.

HOW TO CANCEL INDIVIDUAL GAMES

SEND PARTICIPANTS NOTIFICATIONS:

1. Sign in and go to your team's TeamCenter.
2. On the left-hand navigation, click on the **Schedule** tab.
3. Click into the Game/Event you wish to postpone/cancel.
4. Click the **pencil icon** next to Game Details.
5. Change the status to **Cancelled** or **Postponed**.

NOTE: At the bottom of the event or game creation screen, you have the option to send RSVPs now to those players/staff.

DON'T SEND PARTICIPANTS NOTIFICATIONS:

1. Sign in to your SportsEngine website and turn on **Edit Mode**.
2. Go to a Team Page on your site that you would like to edit.
3. Choose **Game Schedule**.
4. Under the status column, click on the **Status** of the game.
5. On the right side of the page, click on the **gear icon**.
6. Choose **Edit Game Details**.
7. Update the *Game Status* and click **Save Details**.

HOW TO MASS CANCEL GAMES

Mass scoring is used to update game details and scores for large amounts of games all at once.

1. Sign in and turn on **Edit Mode**.
2. Find the "Team Page" that has games that need to be cancelled.
3. Select the **Game Schedule** sub tab.
4. Under the option to Add Game, click the gray **Gear** icon and choose **Mass Score**.
 - This will open up a new tab.
5. Update your games status to **Cancelled** or **Postponed**.
6. Save the new updates by clicking on the **yellow checkmark**.



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HOW TO CREATE A WAITLIST USING REGISTRATION

If your registration is still ongoing but you don't want to charge individuals at this point, you can create a waitlist. Once you determine the season is ongoing you can then move them over to a roster and charge them once the season is confirmed.

You can set up a registration to have fees hidden from applicants and a new waitlist field created. Then when/if the season is resumed:

- The hidden field will need to be enabled and they can sign up as normal **OR**
- A new registration for those waitlisted will need to be created **OR**
- You invoice these members the amounts owed for season fees.

HIDE FEES:

1. Navigate to your "Registration Session".
2. To the right of the questions you need to hide, click the **Gear** icon and choose **Edit**.
3. Click **Advanced Options**.
4. Hide the question from non-admins who complete the registration by checking **Hidden Question**.

Note: If/when this question needs to be shown again, follow the same steps but uncheck the box to make it visible to everyone.

CREATE A WAITLIST QUESTION:

1. Copy your hidden question and it will create a new field on the registration with the exact same options but there will not be any store items attached.
2. This ensures people can still sign up as they normally would but will not be charged until you invoice them or have them register for the options with store items.

Registration and Financials

PAYMENT PLANS

You may update payment plans and dates of installments as you wish, however, this change will only take effect for those who sign up after the change is made.

Note: Any existing plans will not see this change take effect, and you will not be able to cancel or pause a single installment of a payment plan, only the entire plan.



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HOW TO CANCEL OR PAUSE A SINGLE INSTALLMENT OF A PAYMENT PLAN:

There are several options available, but the most popular would be to CANCEL ALL REMAINING PAYMENTS, which cancels the payment plan and the remaining outstanding balance. Then, use the SportsEngine INVOICING TOOL to send a new invoice for the remaining balance, with the payment terms you've chosen to provide more flexibility in this difficult time.

If you do not wish to charge a customer for a specific installment, you could instead choose to let the payment process, and then issue a partial refund the following day in the amount you choose.

HOW TO CHANGE THE DATE OF PAYMENT PLAN INSTALLMENTS

Note, that the installment dates for existing registrations cannot be changed. Instead, CANCEL ALL REMAINING PAYMENTS to cancel this payment plan and the remaining outstanding balance. Use the INVOICING TOOL to send the new payment terms as a new invoice with the remaining balance to provide more flexibility during this time.

INVOICES

HOW TO SEND AN INVOICE

1. Navigate to SportsEngine HQ”, click on the **Invoicing** tab, then choose **Invoices**.
2. If you haven't setup your Invoicing yet, please do so first.
3. In the top-right corner of the screen, click **Send Invoices**.
4. Fill out all the necessary and required fields.
5. Click **Send Invoice**.

HOW TO CREATE INVOICING PAYMENT TERMS

“Payment Terms” are reusable templates that can be applied to invoices to generate payment plans. Members will ALWAYS have the option to pay the full amount up front regardless of payment terms.

NOTE: Payment Terms can only be applied to invoices. Once a term has been applied to an invoice, you will no longer be able to edit the installment settings.

1. Navigate to “SportsEngine HQ”, click on the **Invoicing** tab then choose **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.



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7. Set the installment window (the window of time between the due date of each installment).
8. Click **Add**.

HOW TO ISSUE REFUNDS

REFUND A REGISTRATION ORDER

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

REFUND INVOICES

1. Navigate to “SportsEngine HQ”, click on the **Invoicing** tab and choose **Transactions**.
2. Use the search bar or the Filter by Status option to find the invoice, then click on the *Sale ID* number under the *Sale* column.
3. In the top-right corner, click **Issue Refund**.
4. Choose the payment to refund then set the amount.
5. Click **Refund**.

Full refund: All processing fees are returned to who paid them. I.e. if the registrant pays processing fees they will get the total amount back. If your organization pays processing fees SportsEngine will cover the fee and the registrant will get the full amount back.

Partial refunds: Processing fees are not returned. The registrant will get the exact dollar amount that was entered and that exact amount will be withdrawn from the organization.