

Submitted by Nancy Funk

Search Adults with junior membership

The screenshot shows the SportsEngine HQ interface. The left sidebar contains navigation options: Home, Members, Directory (selected), Memberships BETA, Permissions and Newsletters, Waivers, USA Volleyball, Financials, Registration, Competition, Promotion, Website, and Go to website. The main content area is titled 'Directory' and has tabs for 'People', 'Clubs', and 'Groups and Rosters'. A search bar is present with 'Search by Name or Email' and 'FILTERS (2)'. The filter configuration is as follows:

- Filter by: Membership (dropdown), 20-21 Pione... (dropdown), Membership Status (dropdown), is (dropdown), Paid (dropdown)
- AND SportsEngine Profile (dropdown), Date Of Birth (dropdown), is before (dropdown), 07/01/2001 (calendar)

Buttons include 'ADD SMART GROUP', 'ADD PERSON', 'Clear Filters', 'Add Filter', and 'DONE'. A 'Need Help?' button is on the right. Below the filters, a table shows 22 members:

Name	Membership Status	Membership Status	Membership Status
KB Kerri Blair	--	PAID	--
MB Mia Boyd	--	PAID	--

1-22 of 22 Members

Filter Membership, PR Tryout(or what your jr. membership type), Membership Status, is, Paid, (Add -next row), Sports Engine Profile, DOB, Is Before,07/01/2001

Find the Members

- (1) Click on Members tab
- (2) Click on Directory
- (3) Click Groups and Rosters
- (4) Click on Adults w/Tryout Memberships Smart Group
- (5) Click on a Name
- (6) On the Profile Tab, scroll down to the bottom of the Personal Details block and click show more
- (7) Scroll down to the bottom and click view permissions
- (8) Permission will open in new tab

Profile Type: Self

Adult has purchased the Athlete Tryout Membership for herself instead of the child

- (1) Go back to the tab with the Smart Group
- (2) Click Memberships
- (3) Click the 3 stacked dots next to view eligibility
- (4) Click Cancel
- (5) In the Notes type parent and in parentheses
- (6) Check the box next to issue refund
- (7) Enter the refund amount of \$
- (8) Click Cancel Membership

Profile Type: Other

Adult has entered their information in for both the primary profile and the child profile

- (1) Go back to the tab with the Smart Group
- (2) Copy the email address and send them the following email

Subject: GLR Volleyball Membership update

It appears that when you purchased your son/daughter's GLR Athlete membership you entered your information in twice. Please send me your daughters full name and birthday so we can update her membership data.

Name on the Membership Matches Name on the Personal Information

Email to be sent to member

Subject: Membership Refund

It appears that you purchased the tryout membership for yourself and not your daughter. Unfortunately, I cannot simply switch your information with that of your daughters because the adult needs to be the primary on the account holder. I will start the process to refund you the portion of the membership that was paid to the region.

To purchase a tryout membership for you daughter you need to go to our website and click "Registration" then "USAV Membership" at the top of the page. When it asks you who is this membership for you need to select for my child

Name on the Membership DOES NOT match Name on the Personal Information

Email to be sent to member

Subject: Membership Refund

It appears that you purchased the tryout membership for yourself and not your daughter. Unfortunately, I cannot simply switch your information with that of your daughters because the adult needs to be the primary on the account holder. I will start the process to refund you the portion of the membership that was paid to the region.

Start by logging back into your sportsengine account to change the personal information back to your name and date of Birth. To purchase a tryout membership for you daughter you need to go to our website and click "Registration" then "USAV Membership" at the top of the page. When it asks you who is this membership for you need to select for my child

Update Membership Info

- (1) Go back to the tab with the Smart Group and click on the parent's profile you were working with
- (2) On the Profile Tab, scroll down to the bottom of the Personal Details block and click show more
- (3) Scroll to the top of the page and click edit in the first box
- (4) Update the Childs Name, Date of Birth, and Gender. Click Save

Update Personal Info

- (1) Click the Need Help button on the right hand side of the screen
- (2) Click on the Contact help botton in the top row
- (3) In the Start another conversation box click send message
- (4) Tell sporsengine which member and email address has put their information in for both the primary account and the child account. Tell sportsengine the name of the child you need the child account changed to