

After Registration Ends...



Sean Rose, Marketing Director

Today's Agenda:

- Merging Duplicate Households
- Deleting Registration Records
- Addressing Incomplete Registrations
- Moving Registrations Across Seasons
- Issuing Refunds

Demosphere Knows Youth Sports

- 2,500+ Customers
- 25 years of experience
- 10 years of experience personally



Merge Duplicate Households

- Data Reporting & Management Tab
- Data Resolution Tools Tab



- Select Merge Duplicate Households/Members
- Proceed to List

Merge Duplicate Households

- Check Duplicate Households/Members
- No Limit To Number Merged

Select Households to Merge

Household List Search ... Filter

#	☐	Household Name	Street	
1.	☐	Abracadabra	23452 34rdsd f	wer
2.	☐	Baker	117 George Jefferson Rd	Fall:
3.	☐	Baker	123 Test Drive	Fall:
4.	☒	Kross	123 Jump St	Wa:
5.	☐	Kross	123 Jump St	Wa:
6.	☐	TESTING	wtrherh	wrt:
7.	☐	Temps	Temp	uqe
8.	☐	Tuna	qwefqwef	234
9.	☐	qerteqrt	wertw ert	wer
10.	☐	Tuna	qwefqwef	234
11.	☐	qerteqrt	wertw ert	wer

Page 1 of 1 1 - 11 of 11 Household List

Household List Search ... Filter

#	☐	Household Name	Street	
1.	☐	Abracadabra	23452 34rdsd f	wer
2.	☐	Baker	117 George Jefferson Rd	Fall:
3.	☐	Baker	123 Test Drive	Fall:
4.	☐	Kross	123 Jump St	Wa:
5.	☒	Kross	123 Jump St	Wa:
6.	☐	TESTING	wtrherh	wrt:
7.	☐	Temps	Temp	uqe
8.	☐	Tuna	qwefqwef	234
9.	☐	qerteqrt	wertw ert	wer
10.	☐	Tuna	qwefqwef	234
11.	☐	qerteqrt	wertw ert	wer

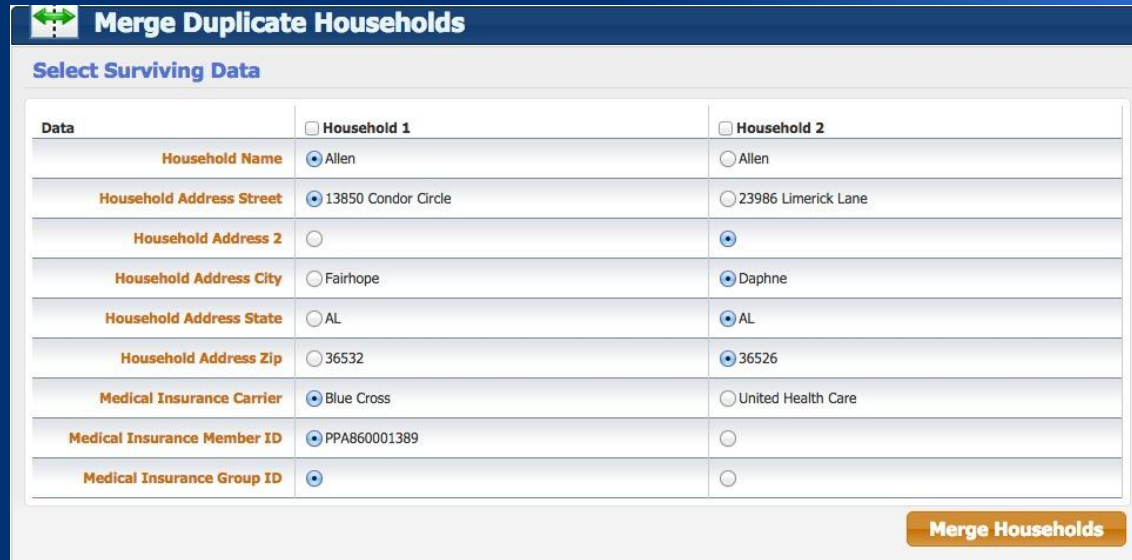
Page 1 of 1 1 - 11 of 11 Household List

Continue Cancel

Tip: Make a change to the household name to identify which one to delete (i.e. “DUP” or “DEL”)

Merge Duplicate Households

- Select Surviving Data Fields



The screenshot shows a web interface titled "Merge Duplicate Households". Below the title is a section labeled "Select Surviving Data". It contains a table with three columns: "Data", "Household 1", and "Household 2". The table lists various data fields with radio buttons to select which household's data to keep. A "Merge Households" button is located at the bottom right of the form.

Data	☐ Household 1	☐ Household 2
Household Name	☒ Allen	☐ Allen
Household Address Street	☒ 13850 Condor Circle	☐ 23986 Limerick Lane
Household Address 2	☐	☒
Household Address City	☐ Fairhope	☒ Daphne
Household Address State	☐ AL	☒ AL
Household Address Zip	☐ 36532	☒ 36526
Medical Insurance Carrier	☒ Blue Cross	☐ United Health Care
Medical Insurance Member ID	☒ PPA860001389	☐
Medical Insurance Group ID	☒	☐

Merge Households

- Click Merge Households/Members
- Note - this is a permanent change!

Delete Registration Records

- Navigate to the Household
- Search For Order Containing Registration To Delete

The screenshot shows a web application for managing household registrations. The header identifies the household as 'Household: Baker' with ID '518aafd5fb2213d23a00018a'. Navigation tabs include 'Household Information & Members', 'Registration Order History' (selected), 'Search Participants Data', and 'Search Volunteers Data'. A 'Help' button is also present.

The main section is titled 'All Household Orders'. On the left, a sidebar lists 'ORDERS BY DATE' with a list of dates and the number of registrations for each. The date '12/3/2014' is highlighted, showing 2 registrations.

The main content area displays the 'Order Overview' for the selected date. It includes buttons for 'Pay with CC', 'Record Payment', 'Refund', and 'Manage Unpaid Payments'. The overview shows the order was processed on Wednesday, December 3rd, 2014, at 09:05:12, submitted by Kris Baker (kbaker@example.com), with a remaining balance of \$85.00 and a cash payment method.

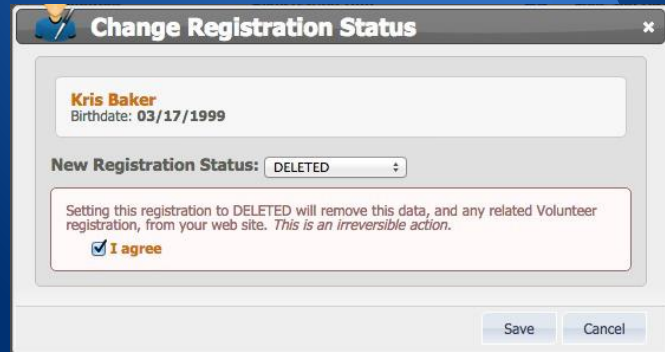
Below the overview is the 'Order Items' section. It lists the registrant as Allan Thompson, born 09/25/2008, male, registered for the Cedar Grove Test in Fall 2013, under 16, in the Red Team. The registration status is 'ACTIVE'. A table of fees and discounts shows a total registration fee of \$125.00, a refund of \$50.00, and an admin adjustment of \$20.00, resulting in a registration total of \$60.00.

ORDERS BY DATE	Order Date: 12/3/2014	Order Overview
» 12/17/2014 3 REGISTRATIONS	Pay with CC Record Payment Refund Manage Unpaid Payments	Order Overview
» 12/16/2014 3 REGISTRATIONS		Processed on: Wednesday - December 3rd 2014, 09:05:12
» 12/3/2014 2 REGISTRATIONS		Submitted by: Kris Baker <kbaker@example.com>
» 9/4/2014 1 REGISTRATIONS		Remaining Balance: \$85.00
» 7/16/2014 1 REGISTRATIONS		Payment Method: CASH
» 7/16/2014 1 REGISTRATIONS		
» 6/23/2014 1 REGISTRATIONS		Order Items
» 6/23/2014 0 REGISTRATIONS		
» 6/23/2014 1 REGISTRATIONS		
» 6/16/2014		

Registrant	Registration Info	Fees and Discounts
Allan Thompson	Program: Cedar Grove Test	U10 - U14 Registration Fee \$125.00
Birthdate: 09/25/2008	Season: Fall 2013	Refund Injured Broken Leg -\$50.00
MALE	Group: Under 16	Admin Adjustment -\$20.00
	Red Team	Admin Adjustment \$5.00
	Registration Status: ACTIVE	Registration Total \$60.00
	Recurring Installment Payments	

Delete Registration Records

- Refund The Registration On The Order
 - Only \$0 Balance Can Be Deleted
- Edit Registration Status To Deleted
 - This is a permanent change!
- Deleted Registrations Will Not Show Up In Registration Management
- Will Show In Order History For Historical Purposes



The screenshot shows a web application dialog box titled "Change Registration Status". At the top left of the dialog is a small icon of a person with a backpack. The title bar includes a close button (X). The main content area displays the name "Kris Baker" in bold, with "Birthdate: 03/17/1999" below it. A label "New Registration Status:" is followed by a dropdown menu currently showing "DELETED". Below this, a warning message is enclosed in a light red box: "Setting this registration to DELETED will remove this data, and any related Volunteer registration, from your web site. *This is an irreversible action.*". Under the warning is a checkbox that is checked, followed by the text "I agree". At the bottom right of the dialog are two buttons: "Save" and "Cancel".

Deleting Incomplete Registrations

- Household Management Tab
- View Incomplete Orders



The screenshot displays the RosterPro® Registration web application. The top navigation bar includes a logo and the title "RosterPro® Registration". Below this, a secondary navigation bar features four tabs: "PROGRAM SETUP", "HOUSEHOLD MANAGEMENT" (which is the active tab), "FINANCIAL & BANKING", and "REGISTRATION SETTINGS". Under the "HOUSEHOLD MANAGEMENT" tab, there are several action buttons: "HELP", "View Incomplete Orders" (highlighted in pink), "Add New Household" (green), "Edit Missing Proof of Birth" (blue), and "View all Households" (teal). The main content area of the "HOUSEHOLD MANAGEMENT" tab contains a search instruction: "Search Household Data by Name, Address, Phone Number and/or Email Address - Example: John Doe (703) 536-1600". Below this instruction is a search form with a text input field labeled "Household search term:" and a prominent orange button labeled "Search all Households".

Deleting Incomplete Registrations

- Choose Household With Incomplete Order to Delete



#	Type	Date	Household Name	Submitter First Name	Submitter Last Name	Submitter Email	Submitter Ph
1.		07/30/2014	Baker	Miles	Baker	mbaker@demosphere.com	(703) 626-017
2.		01/08/2015	Waugh	Eric	Waugh	gm@ethosoccer.org	
3.	REGISTRATION	01/20/2015	Baker	Kris	Baker	kbaker412@gmail.com	(703) 966-258
4.		01/21/2015	Santi	Jeanie	Santi	jeanie.santi@gmail.com	(415) 499-340
5.		01/27/2015	Hollands	Martyn	Hollands	martynhollands@hotmail.com	(401) 440-064
6.	REGISTRATION	06/03/2015	Jackson	Stephen	Jackson	sgjackson22@gmail.com	(843) 697-450
7.	REGISTRATION	10/15/2014	Abracadabra	Jill	Abracadabra	jill.abracadabra@mail.com	(555) 555-555
8.		06/07/2014	Bruce	Sue	Bruce	sue@brucehq.com	(781) 929-999
9.	REGISTRATION	06/11/2014	Ringwald	Molly	Ringwald	mringwald@example.com	
10.		06/17/2014	Salter	William (Chris)	Salter	chris.salter@sprint.com	(703) 929-474
11.	REGISTRATION	07/15/2014	Pullen	David	Pullen	dave@pmcdm.com	(703) 856-043
12.		07/30/2014	Cooper	Heidi	Cooper	hcooper4@me.com	(973) 713-212
13.	REGISTRATION	08/27/2014	Martinez-Wittinghan	Diana	Hernandez	Dianishg@gmail.com	(631) 793-394
14.	REGISTRATION	08/27/2014	Martinez-Wittinghan	Diana	Hernandez	Dianishg@gmail.com	(631) 793-394
15.		01/22/2015	Baker	Kris	Baker	kris@demosphere.com	(703) 569-895
16.	REGISTRATION	06/03/2014	Sprecher	Kevin	Sprecher	kccsprecher@gmail.com	(513) 288-153
17.		06/05/2014	Pollock	Ricarda	Pollock	ricnicp@gmail.com	(732) 952-356
18.	REGISTRATION	02/27/2015	Edwards	Spenser Anne	Edwards	saedwards@demosphere.com	(555) 555-555
19.		06/11/2014	Graf	Bailev	Graf	bailevaraf11@hotmail.com	(360) 305-009

Page 1 of 2 44 Records

Deleting Incomplete Registrations

- Registration Order History Tab
- Select Incomplete Order
- Delete Order (Can only delete one at a time)

The screenshot displays the 'Household: Baker' interface. At the top, the Household ID is 51d1cbb3fb2213e5610004af. The 'Registration Order History' tab is selected. The 'All Household Orders' section shows a list of orders by date. The 'INCOMPLETE ORDER' section is active, showing an 'Order Overview' for an order started on 06/23/2014 at 4:24:24 pm, submitted by Miles Baker. The 'Most Advance Step' is 'Household Information'. A red circle highlights the 'Delete Order' button in the top right corner of the 'INCOMPLETE ORDER' section.

Household: Baker Household ID: 51d1cbb3fb2213e5610004af

Household Information & Members | **Registration Order History** | Search Participants Data | Search Volunteers Data

All Household Orders [Help](#)

ORDERS BY DATE

- » **3/19/2014**
2 REGISTRATIONS
- » **3/17/2014**
4 REGISTRATIONS
- » **2/24/2014**
2 REGISTRATIONS
- » **1/14/2014**

INCOMPLETE ORDER **Delete Order**

Order Overview

Started on: **06/23/2014, 4:24:24 pm** Most Advance Step: **Household Information**

Submitter: **Miles Baker**

Moving Registrations Across Seasons

- Registration Order History
- Edit Registration Info

Order Date: 6/24/2015 [Pay with CC](#) [Record Payment](#) [Manage Unpaid Payments](#)

Order Overview

Processed on: **Wednesday - June 24th 2015, 14:41:45**

Submitted by: **Kris Baker**
<kbaker412@gmail.com>

Remaining Balance: **\$85.00**

Payment Method: **CHECK**

Order Items

Registrant
Alex Baker
Birthdate: **04/05/2005**
FEMALE

Registration Info
Program: **Kris Test League**
Season: **2015**

Registration Status: **PENDING PAYMENT**

Registration ID: 558a9e96e696e78cd7d000

Fees and Discounts

Reg Fee	\$100.00
Pay in Full Discount	-\$20.00
Registration Total	\$80.00

Moving Registrations Across Seasons

- Select New Destination Program & Season
- Can Select Groupings & Teams If Created Previously
- System Generates “Map” to Match IDs
- Review the information & choose which categories to match, orphan or delete

 **Edit the Program/Season for this Registration** ✕

Registration ID: 558af9e96d696e78cd7c0000

Registration Info - PARTICIPANT

Registrant: **Alex Baker** Birthdate: **04/05/2005** Gender: **FEMALE**

Current Program: **Kris Test League** Destination Program: **Rec Soccer**

Current Season: **2015** Destination Season: **Spring 2015**

Current Grouping: Destination Grouping:

Current Team: Destination Team:

Seasonal Questions Map existing registration answer data to new Season's questions

☐ Rows in GRAY have been mapped to a destination Seasonal Question
☐ Rows in ORANGE will ORPHAN current question answer data, and will add a new column under destination Season's Registration Management
☐ Rows in RED will DELETE current question answer data

Current Form Question	Answer Data	Map to Destination Question
Player Information - # of Seasons Played	3	Player Information - # of Seasons Played
Volunteer Information - Assistant Coach	false	Volunteer Information - Assistant Coach
Volunteer Information - Coach	true	Volunteer Information - Coach
Player Information - Coach Preference	Smith	Player Information - Coach Preference
Volunteer Information - Coaching License:	National "C" License	Volunteer Information - Coaching License:
Volunteer Information - Email Secondary	jbaker2@example.com	-- ORPHAN ANSWER --
Volunteer Information - Email:	jbaker@example.com	-- ORPHAN ANSWER --
Volunteer Information - Field Marshall	false	Volunteer Information - Field Marshall

Moving Registrations Across Seasons



Volunteer registrations associated with the registrant will prompt a pop-up reminder asking the Administrator to also move the volunteer to the new season

Issuing Refunds

- Household Management Tab
- Select Desired Household
- Registration Order History Tab

[Household Information & Members](#) | [Registration Order History](#) | [Search Participants Data](#) | [Search Volunteers Data](#)

All Household Orders [Help](#)

ORDERS BY DATE

- » 12/17/2014
3 REGISTRATIONS
- » **12/16/2014**
3 REGISTRATIONS
- » 12/3/2014
2 REGISTRATIONS
- » 9/4/2014
1 REGISTRATIONS
- » 7/16/2014
1 REGISTRATIONS
- » 7/16/2014
1 REGISTRATIONS
- » 6/23/2014
1 REGISTRATIONS
- » 6/23/2014
0 REGISTRATIONS
- » 6/23/2014
1 REGISTRATIONS
- » 6/16/2014
3 REGISTRATIONS

Order Date: 12/16/2014

[Pay with CC](#) [Record Payment](#) [Refund](#) [Manage Unpaid Payments](#)

Order Overview

Processed on: **Tuesday - December 16th 2014, 16:30:33**

Submitted by: **Kris Baker**
<kbaker@example.com>

Remaining Balance: **\$213.00**

Payment Method: **VISA**
(ending 1111)

[Convert to Cash](#)

Order Items

Registrant
Allan Thompson
Birthdate: 09/25/2008
MALE

Registration Info
Program: CUSA CJ Spring Camp
Season: Spring 2015
Group: U10 - U14
Gold Team

Registration Status: **ACTIVE**

Fees and Discounts
Registration Total **\$0.00**

Registration ID: 5490a479626dcd35250027c8

[Recurring Installment Payments](#)

Issuing Refunds

- Click Registration To Refund
- **Red** Refund Button

The screenshot displays a web application interface for managing household orders. The main navigation bar includes links for 'Household Information & Members', 'Registration Order History', 'Search Participants Data', and 'Search Volunteers Data'. The 'Registration Order History' link is active, showing a list of orders by date. The 'Refund' button is circled in red in the top right corner of the 'All Household Orders' section.

The 'Record Partial Refund' modal window is open, showing the 'Refund from February 16, 2015 order payment' section. The modal includes a table of items to be refunded and a 'Remark - Optional' field.

Order Overview

Order Date: 12/17/2014

Processed on: Wednesday - December 17th 2014, 10:00:38

Submitted by: Kris Baker
<kbaker@example.com>

Order Items

Registrant: Demo4 Person
Birthdate: 05/07/2003
MALE

Registration Info: Program: Demosphere Rec Soccer
Season: Fall 2014
Registration Status: ACTIVE

Record Partial Refund

Dec 16 | Dec 17 | Feb 16 | Mar 16 | Apr 1 | Apr 16 | REFUND ALL

Feb 16 Refund from February 16, 2015 order payment

Current Payment 02/16/2015					Order Amounts	
Show Fees	Item Name	Method	Paid	Refund Amount	Reg Status	Total Refund
☒	Crazy Dave - Rec Soccer Fall 2013 - Old	VISA	☐	\$13.00	ACTIVE	\$13.00
☒	Registration Fee (discounted)		☐	\$13.00		\$13.00
Totals:			\$13.00	\$13.00		\$13.00

Remark - Optional

Continue to Refund Review Cancel

Demosphere Can Help!

- 25 Years Of Experience
- Best-In-Class Support
support@demosphere.com
- Demosphere Blog
[Merge Those Duplicates With RosterPro](#)
[Transfer Registrations Across Seasons](#)
[Adjust Fees For Amended Volunteer Registration](#)





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