Customer Service Cheat Sheet

First drafted:
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Created by:
Sport:80

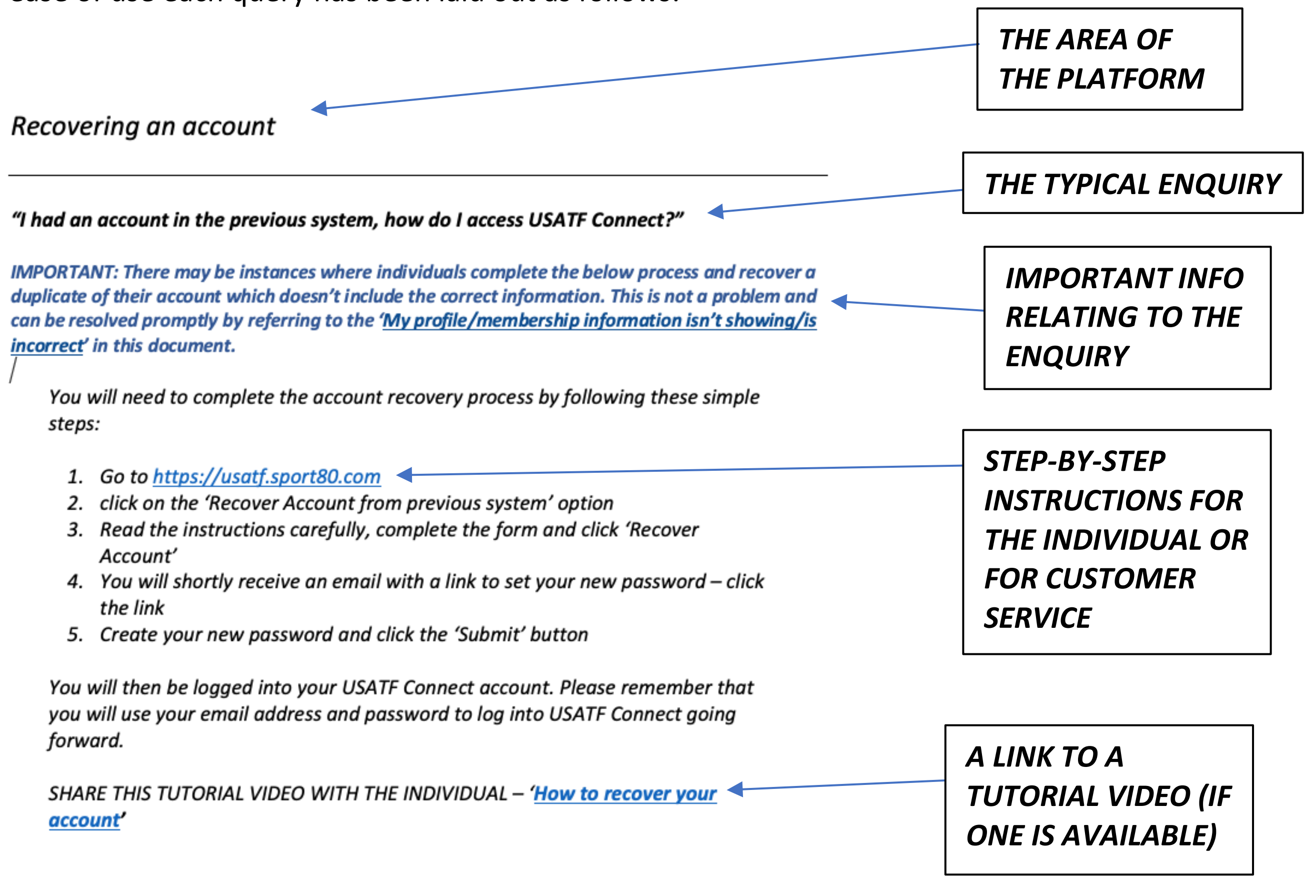
Document Overview:

This document has been created to aid the NGB Customer Service Teams with typical enquiries experienced during the launch of a new membership platform.

Introduction

This document covers a variety of areas within the Platform where individuals typically require assistance. Each area includes frequently asked questions as well as how these queries can be resolved.

For ease of use each query has been laid out as follows:


Recovering an account

"I had an account in the previous system, how do I access USATF Connect?"

IMPORTANT: There may be instances where individuals complete the below process and recover a duplicate of their account which doesn't include the correct information. This is not a problem and can be resolved promptly by referring to the 'My profile/membership information isn't showing/is incorrect' in this document.

You will need to complete the account recovery process by following these simple steps:

1. *Go to https://usatf.sport80.com*
2. *click on the 'Recover Account from previous system' option*
3. *Read the instructions carefully, complete the form and click 'Recover Account'*
4. *You will shortly receive an email with a link to set your new password – click the link*
5. *Create your new password and click the 'Submit' button*

You will then be logged into your USATF Connect account. Please remember that you will use your email address and password to log into USATF Connect going forward.

*SHARE THIS TUTORIAL VIDEO WITH THE INDIVIDUAL – '**How to recover your account**'*

It is important to note that not all queries can be resolved in real-time. They may require the involvement of other members of staff or Sport:80, or more time to arrive at a satisfactory resolution. In these cases, it is important to manage the expectations of the individual.

Following this introduction there is a contents page which allows you to navigate to specific sections simply by clicking them.

Contents

Profile Information

"How do I update my contact details in the Platform?"

When you log in follow these simple instructions:

1. *Click the 'View Profile' card*
2. *Select the 'Profile' tab*
3. *Click the green 'Edit Profile' button*

A new window will appear where you can edit your information.

The ability to edit certain fields will be locked such as first name, last name, date of birth and gender. This is to ensure that this crucial information is not manipulated. If there is a genuine need to change any of these fields, please ensure the individual explains why and explain that the changes will be actioned.

Access Management & Roles

"I've logged into my account, but my profile/membership information isn't showing/is incorrect."

This is usually linked to the individual having duplicate profiles within the Platform. To check whether this is the case and resolve it for the individual follow the steps outlined below.

Step 1 – Check whether there are duplicates within the Platform

1. *Log in to the Platform and switch into your NGB account*
2. *Click the 'Members' option on the left side and select 'Quick Search'*
3. *Ask the individual for personal details and take note of them*

IMPORTANT: ask the individual for their full name, membership number, date of birth, email address and postal address. Also ask them whether they are known by any other names – this may help you discover whether they have a duplicate profile. Explain that you will search the Platform to find out what the problem is.

4. *If the 'Quick Search' feature does not provide you with the necessary information you need. Use the 'Smart List' feature to find the individual's profile(s)*
5. *Based on the results make a judgement call as to whether you believe there are duplicates of the person's profile. If yes, move to Step 2.*

Step 2 – Merge and consolidate profiles

1. *Click into the profile which the individual has access to (you will be able to determine this by asking them what information they can see)*
2. *Scroll down and select 'Access Management'*
3. *Click the blue 'Merge Account' button*

IMPORTANT: the search will only match accounts with the exact same first AND last name. E.g. if you have one 'John Smith' and one 'Jonny Smith' profile that you want to merge, and you search 'John Smith', only the first account will show. To fix this, you must edit the names of the accounts so that they match.

4. *From the list Select the accounts you want to merge by ticking the boxes in the 'merge' column*

PLEASE NOTE: The primary account is the one that will remain after merging. We recommend that you select the account with the correct email address in the 'Primary MGR' column as the primary account. All roles, qualifications, memberships etc will transfer across into the profile you keep.

5. *Click the 'Update' button*

FOR MORE HELP, READ THIS ARTICLE.

"I can't see my family members profile in my account, are you able to give me access so I can manage them?

Step 1 – Verify there is a valid reason for accessing another person's profile

1. *Log in to the Platform and switch into your NGB account*
2. *Click the 'Members' option on the left side of the page and select 'Quick Search'*
3. *Ask the individual for their membership number, email address, first name and last name, entering them into the quick search feature as you go - click 'Search'*
4. *As an added security measure, ask the individual their date of birth and the first line of their address – verify this with the information in their profile*
5. *Repeat steps 1 to 4 for the profile they are wishing to access.*

If the individual has successfully verified both sets of details and/or you are content with the information/explanation provided, move on to Step 2.

Step 2 – Granting access

1. *Whilst in the profile of the individual they wish to access, select the 'Access Management' option.*

2. *In the 'New User Email or Organisation' section enter the email address of the individual requesting access as it appears within their Profile*
3. *Select the level of access they require*

   PLEASE NOTE: there can only be one primary contact for a profile.

4. *Click the 'Update' button to action the change*

As an additional check ask the individual to log out and then back into their account to check if they can see the profile.

FOR MORE HELP, [READ THIS ARTICLE](#).

"I don't have access to my club/organisation profile, could you help with this?"

IMPORTANT: Check with the individual that they are following the correct steps to switch into their club/organisation account. For example, are they prompted to switch into their club/organisation when logging in? Or are they clicking the arrow next to their account icon in the top left of the screen?

1. *If they are unable to access their club/organisation account, ask the individual for their full name, membership number, date of birth, email address and postal address.*
2. *Ask which club/organisation they require access to and ask why type of role they have at the organisation*
3. *To grant access, locate the organization and open their profile, click 'Edit Profile'*
4. *Navigate to the 'Roles' tab*
5. *Click 'Add Role'*
6. *You will be asked if this role is for yourself or not*
7. *Follow the on-screen prompts, filling in the required information*
8. *Click 'Submit'*

FOR MORE HELP, [READ THIS ARTICLE](#).

"My club/organisation role is in an action required status and I can't access the organisation account, why?"

Individuals are required to have certain valid items in their profile in order for their roles and associated access to be granted.

The user will be able to view why their role is in an 'Action Required' status from the 'Roles' section of their profile. You can check this by following these steps:

1. *Log in to the Platform using your email address and password*
2. *Select your NGB account when prompted*
3. *Click the 'Members' option and choose either 'Quick Search' or 'List'*

4. *Use the search function to find the individual and click on their profile*
5. *Select the 'Roles' option and click the 'Action Required' button*

The reason as to why the role is in an action required state will be displayed here.

Membership Registrations & Renewals

"I need to purchase my membership for the first time but don't know how, can you help?"

Purchasing your membership is straight-forward. Simply go to:

https://usaas.sport80.com/public/wizard/a/1452

Complete the details required in the form and follow the instructions to complete the checkout process.

"How do I renew my membership?"

Renewing your membership is straight-forward. Simply go to:

https://usaas.sport80.com/public/wizard/a/1452

Alternatively, just follow these simple steps:

1. *First got to* the Platform *and log in using your email address and password*
2. *Click your profile card*
3. *Select the 'Memberships' option*
4. *Click the 'Renew' button on your membership and complete the form*
5. *Click 'Add & Checkout' and follow the instructions to complete your payment*

You will shortly receive an email confirming your membership details.

FOR MORE HELP, READ THIS ARTICLE.

"I don't have access to the internet and need to renew my membership as soon as possible, can you help?"

IMPORTANT: in the majority of cases we would advise that you strongly encourage members to renew their membership so they can learn how to do this year-on-year rather than relying on the NGB. However, we understand there are certain scenarios where this unavoidable.

Step 1 – Verify the individual's details

1. *Log in to the Platform and switch into your NGB account*
2. *Click the 'Members' option on the left side of the page and select 'Quick Search'*
3. *Ask the individual for their membership number, email address, first name and last name, entering them into the quick search feature as you go*
4. *As an added security measure, ask the individual their date of birth and the first line of their address – verify this with the information in their profile*

Move on to Step 2 once the individual's details have been verified.

<u>Step 2 – Renew their Membership</u>

6. *Open the individual's profile, click on the 'Memberships' option*
7. *Click the 'Lapsed' button and run through the form with the individual checking the details and updating any fields that are required – In these instances make sure 'One Time Payment' is **ALWAYS** selected*
8. *Click the 'Add & Checkout' button and follow the instructions provided*
9. *You will need to ask the individual for their credit/debit card details when prompted by the system*

DO NOT SELECT THE 'REMEMBER ME' OPTION WHEN PROCESSING A PAYMENT ON BEHALF OF SOMEONE.

10. *Click the 'Pay' button*

Once the payment has been processed the individual will receive an email confirmation to the email address on file.

"My XXXXX is in a pending approval status, why hasn't it been approved?"

Certain items may require approval.

Carry out the following below to approve the item:

1. *Log in to the Platform and switch into your NGB account*
2. *Click the 'Members' option on the left side of the page and select 'Quick Search'*
3. *Ask the individual for their membership number, email address, first name and last name, entering them into the quick search feature as you go - click 'Search'*
4. *Once in the individual's profile, click on the option where the lives e.g. Memberships*
5. *Click the 'Pending Approval' button and carry out the required checks*
6. *Once you are happy, click the 'Validate' button in the bottom right*

FOR MORE HELP, [READ THIS ARTICLE](#).

Background Screening (US DOMAINS ONLY)

"How do I complete my background screening from my profile?"

Completing a background screening is simple in the Platform. Guide the individual through these steps:

1. *Log in to the Platform using your email address and password*
2. *Click your profile card*
3. *Select 'Background Screening' and click the blue 'Add' button*
4. *Select the type of background screening you wish to complete*
5. *Complete the form as instructed and click 'Add & Checkout'*
6. *Complete the checkout process as instructed*

Once the Individual has completed the above their details will be sent to the background screening provider who will run the checks and return the results back to the Platform.

"Why is my background screening 'pending approval'?"

This indicates that the checks are still being carried out by the background screening provider.

There is no standard time period for the checks to be completed and the results provided. The individual will be notified when the checks have been completed and their profile will automatically update.

FOR MORE HELP, [READ THESE ARTICLES](#).

US Center for SafeSport

"How do I complete the US Center for SafeSport training from my profile?"

Completing the SafeSport training is simple in the Platform. Guide the individual through these steps:

1. *Log in to the Platform using your email address and password*
2. *Click your profile card*
3. *Select the 'US Center for SafeSport Training' option*
4. *Select the type of training you want to complete*

5. *In the pop-up click on 'Start Training'*
6. *Complete the training programme in the SafeSport system*

Once the individual has completed the training their profile will be updated accordingly.

"Do I have to take the training in one session, or can I save and return to it?"

Individual's will have the ability to save your progress through the SafeSport training at any point and return to complete it at your convenience.

"I've completed my SafeSport training, but my status hasn't updated why is this?

Sometimes the status of someone's SafeSport training can take a short while to update within the Platform.

If it hasn't updated within 24 hours of being completed, please ensure that they use the support feature to notify the Customer Service team who can in turn notify Sport:80.

How do I download my SafeSport certificate?

Individuals can download their SafeSport certificate from the platform at any time.

They just need to click the 'SafeSport' option when logged into their profile, click the green status button and click 'Download Certificate'.

FOR MORE HELP, READ THESE ARTICLES.

Certifications

"How do I add a certification to my profile?"

Individuals can add certifications to their profile by following these step-by-step instructions:

1. *Log in to the Platform using your email address and password*
2. *Click your profile card*
3. *Select the option where the certification lives, for example 'Coach Certifications'*
4. *Click the blue 'Add' button and select their certification type*
5. *Complete the form as instructed and click 'Add'*

The certification will go into a 'pending approval' status while a member of the NGB team reviews the information. Once approved, the Individual's Profile will be updated.

Why is my certification in an action required status?

If the certification is in an action required status it means the individual doesn't fit the dependency criteria linked to the item. If the individual clicks the red 'Action Required' button it will explain what actions they need to take.

Club Administration

"I don't have access to my club/organisation profile, could you help with this?"

IMPORTANT: Check with the individual that they are following the correct steps to switch into their club/organisation account. For example, are they prompted to switch into their club/organisation when logging in? Or are they clicking the arrow next to their account icon in the top left of the screen?

1. *If they are unable to access their club/organisation account, ask the individual for their full name, membership number, date of birth, email address and postal address.*
2. *Ask which club/organisation they require access to and ask why type of role they have at the organisation*
3. *To grant access, locate the organization and open their profile, click 'Edit Profile'*
4. *Navigate to the 'Roles' tab*
5. *Click 'Add Role'*
6. *You will be asked if this role is for yourself or not*
7. *Follow the on-screen prompts, filling in the required information*
8. *Click 'Submit'*

FOR MORE HELP, [READ THIS ARTICLE](#).

"How do I renew my club membership?"

You can guide the individual to the Club Membership Wizard, guide them through the club renewal process or direct them to the tutorial video if you have one.

Club Membership Wizard:

https://usaas.sport80.com/public/wizard/a/1453/home

Guiding someone through the club membership renewal process:

1. *Instruct the individual to log in with their email address and password*
2. *When logging in they will be prompted to click on their club name*
3. *Once in their club profile, they will need to click on the 'Memberships' option*
4. *Next, they will need to click the 'Lapsed' button and complete the form as instructed*
5. *Next, they will need to click the 'Add & Checkout' button and complete the checkout process*

Once they have completed the checkout button their membership will either go into a 'Current' status or a 'Pending Approval' status depending on the settings. If this item goes into a 'Pending Approval' status the membership will be reviewed and approved by the relevant member of the NGB.

"How do I search for members and view their profiles?"

Searching for members is straight-forward. Tell the club administrator to:

1. *Log in to the Platform and switch into their organisation account*
2. *Click the 'Members' option on the left side and select 'Quick Search' to locate the member*
3. *Ask the individual for personal details and take note of them*
4. *Alternatively, if the 'Quick Search' feature does not provide you with the necessary information you need. Use the search feature to find the individual's profile(s)*

"How do I view a certain sub-set of members affiliated to my club, for example all those that have pending memberships?"

Clubs will be able to use the advanced filter tool from their club profile. Please provide the organisation administrator with the following support articles.

- *Using Advanced Filters*
- *What types of filters can be used in the 'Advanced Filters'?*

"How do I renew an individual's membership on their behalf?"

There are two ways to guide someone through the process of renew an individual's membership on their behalf:

First Way:
Purchasing membership on someone's behalf is straight-forward. Simply go to: [*https://usaas.sport80.com/public/wizard/a/1452*](https://usaas.sport80.com/public/wizard/a/1452)

1. *Instruct the individual to input their email address and then input their password*
2. *Select their organisation role*
3. *Locate the athlete they want to buy membership on behalf of and click 'Select'*
4. *Follow the on-screen prompts*
5. *They will then need to complete the checkout process as instructed*

Second Way:

1. *Instruct the individual to log in with their email address and password*
2. *When logging in they will be prompted to click on their organisation name*
3. *Once in their organisation profile, they will need to click on the 'Members' option and then select 'List'*
4. *They will now have to search for the individual and click the individual to open their profile*
5. *Click 'Memberships' and then click 'Renew' button*
6. *They will need to complete the membership renewal form and then click 'Add & Checkout'*
7. *They will then need to complete the checkout process as instructed*

Helpful Administration information

How do I add blue description boxes to categories on a profile (e.g. membership)

The purpose of the information box is to provide an NGB with the ability to either inform or instruct their users within a particular category and can help lower the number of support requests submitted by users.

This feature can be updated within the 'Config' section. This section is only accessible to users who have a 'Super Admin' role within their NGB.

1. *Login and switch your NGB account*
2. *Click 'Config' (on the left-hand sidebar)*
3. *Click 'Add Ons'*
4. *Locate the 'Category' and click the three dots to display the available 'Actions'*

5. *Click 'Edit' and navigate to the 'Description' tab*
6. *Insert or edit your text*
7. *Click 'Save'*

FOR MORE HELP, [READ THIS ARTICLE](#).

How do I update the email footers on our automated emails?

The footer is the text at very bottom of the email (that often contains your organizations' address, email and/or office contact details). The information is added to EVERY email that is sent from the platform including automated emails such as renewal reminders and event emails sent from event admin panels.

1. *It's a quick process to update the information as follows:*
2. *Log into the platform and switch into your organizations' account*
3. *Click on 'Config'*
4. *Click on 'Emails'*
5. *Select 'Email Footers'*
6. *This takes you straight to the text which currently appears on the footer*
7. *Make any changes you need to and click 'Save'*

FOR MORE HELP, [READ THIS ARTICLE](#).

How do I update 'Renewal Reminders' email text?

As an NGB you have the ability to set custom email text for your renewal reminders. To update the renewal reminders to have custom text, follow these steps.

1. *Login and switch into your NGB account*
2. *Click 'Config'*
3. *Click 'Add Ons'*
4. *Click the 'Add On Category' you would like to view (e.g. 'Memberships')*
5. *Click the three dots under 'Actions' on the 'Add On Type' you like view/ edit (e.g. 'Individual Membership')*
6. *Click 'Renewal Reminders' (this will only show if the reminders are 'On')*
7. *Click 'Edit' on the type you would like to view/ edit*
    a. *Edit Pre - this is the email that is sent BEFORE the item has lapsed*
    b. *Edit Post - this is the email that is sent AFTER the item has lapsed*
8. *Update the text and click 'Save'*

FOR MORE HELP, [READ THIS ARTICLE](#).

How do I update passes?

E-Passes and Certificates can be set up on add-ons to provide your members with evidence of a valid add on it could be, for example, a membership, license or qualification. You have the option to set these up as a combination of e-pass, certificate, or a printable card.

1. *Log into your organization account*
2. *Click on Config*
3. *Click on 'Add Ons' in the left-hand navigation panel*
4. *From the 'Add on Categories' list select the add on you wish to set up passes for*
5. *Next, you will see the list of add on types within that category*
6. *Click on the 'Actions Menu' to the far right of the line item (displayed as three stacked dots)*
7. *From the pop-up menu click on 'Passes'*
8. *Set up your passes and certificates by clicking on the relevant 'Edit button'*

FOR MORE HELP, READ THIS ARTICLE.

How do I create Discount Codes?

There are several ways to set up discounts within the Platform. This article explains how to set up discount codes.

How do I create support articles?

The 'Support Article' section is an area that top level organizations (usually NGBs) can use to provide users with answers to frequently asked questions.

1. *Log in to the Platform and navigate to your NGB account*
2. *Click 'Config'*
3. *Click 'Support Articles'*
4. *Select the relevant category*
5. *Click 'Add New'*
6. *Complete the form and click 'Save*

FOR MORE HELP, READ THIS ARTICLE.

How can public entry lists be configured?

By default, if an event displays the entry list publicly, the entry list will display the names of athletes age 18 or above. This can be configured to display any age, if you would like everyone to display irrespective of their age or updating the default age to another age, please contact Sport:80 to update the default age.

"How do I approve an Add On e.g. Coach Certification?"

1. *Login and switch into your organisation*
2. *Click 'Members'*
3. *Locate the profile and maximise their profile*
4. *Click the menu item where the 'Add On' belongs (e.g. 'Coach Certification')*
5. *Locate the item and click the 'Pending Approval' status button*

6. *Navigate through the form and check all the information is correct (you may also need to download the certificate, and to do this click the cloud icon)*
7. *Now click 'Validate' to approve the 'Add On'**
8. *The 'Add On' will now be in a 'Current' status*

   **If you click 'Invalidate' the 'Add On' the status will transition into an 'Invalid' status.*