

## HOW TO CREATE GROUPS FROM MEMBER DIRECTORY

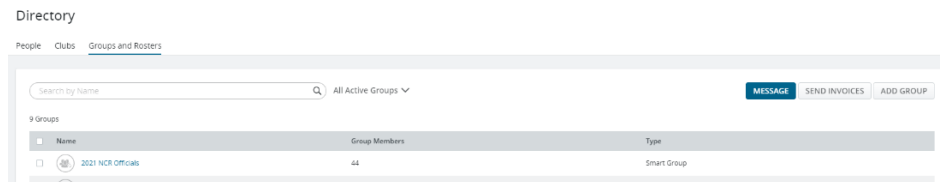
You must have "Admin" or "Webmaster" permissions to create a group from the Members Directory.

There are two kinds of Groups that you can create:

- **Group** - Manually add the members to a group.
- **Smart Group** - Dynamically adds members to a group based upon certain filtered criteria.

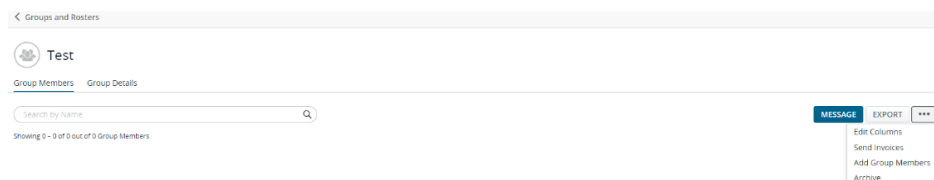
### Option 1 - Create a Group

1. Sign in to "SportsEngine HQ."
2. Once in "SportsEngine HQ", click **Members** then choose **Directory**.
3. Under *Members*, choose the **Groups and Rosters** sub tab.



4. In the top-right corner, click **Add Group**.

5. Input the "Group Name" and update the "Privacy Setting."
6. Click **Add**.
7. On the right side, click on the **three dots**. Choose **Add Group Members**.



8. Type in the "names" of the members you want to add to the group and click **Add**.
  - You can only add people who are in your member directory to your group.

## Option 2 - Create a Smart Group

1. Sign in to "SportsEngine HQ."
2. Click **Members** tab then choose **Directory**.
3. Choose the blue **Filter** button.
4. Filter by a *Registration, SportsEngine profiles, Membership or Suspensions*.

Directory

People Clubs Groups and Rosters

Search by Name or Email

Filter by: Registration

Registration  
SportsEngine Profile  
Membership  
Suspensions

5. Choose your **Source**.

Directory

People Clubs Groups and Rosters

Search by Name or Email

Filter by: Membership

28,801 Members

☐ Name ☒ ADMIN

20-21 LoneStar - Junior Membership - Player  
20-21 NCR Full Junior Player - 17 and younger age definitions (2020-21)  
20-21 NCR Full Junior Player - 18s age definition only (2020-21)  
20-21 NCR Full Adults w/ Junior Program - Non Coaching Role (2020-21)  
20-21 NCR Full Certified Official - Not Affiliated with Junior Program (2020-21)  
20-21 NCR Full Coach Membership (2020-21)

Activation Date  Expiration Date  Membership Status

6. Choose your **Data** then finish your filter selections.

Directory

People Clubs Groups and Rosters

Search by Name or Email

Filter by: Membership

28,801 Members

☐ Name ☒ ADMIN

Expiration Date  equals

Membership ID  
Membership Received  
Order Date  
Activation Date

Expiration Date  Membership Status

7. Click **Done**.
  - A finalized list of your members will appear.
8. Click **Add Smart Group**.
9. Name the group and click **Add**.

**As of 1/6/21**