



## How to use TeamUnify to manage and monitor your account

This guide explains how to login to your active TeamUnify account, manage your account and members. From page 4, the financial aspects of member's accounts are explained including how to navigate the invoices and payments (both current and historical).

1. To access your activated account, go to [www.camdenswimming.co.uk](http://www.camdenswimming.co.uk) and navigate to the left side of the page and click the 'Sign In' link



2. You will be taken to the SportsEngine sign-in page, this is the umbrella company that operates TeamUnify. Use the email address you registered with (you also receive Club correspondence to this email). Again, you have created the password, but can reset this by following the 'forgot your password' link if needed. If you're still stuck, please contact the [Office Manager](#) for further assistance.

**Sign in to Camden Swiss Cottage Swimming Club**

Enter your email address to sign in or create an account

Email Address

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**Nice to see you again!**

krista.bibblings@camdenswimming.co.uk [Not You?](#)

Password

[Forgot your password?](#)

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3. Once you login, you will see the options on the left column have changed and you will need to use this menu to access your account and invoicing information.
  - a. System – Start Registration – follow this link to add a new member to your account (if needed).



4. **My Account** is the most important and relevant heading you will regularly navigate. When clicking on the link a drop down menu appears.
  - a. **System Overview** – sends you to a separate SportsEngine website, providing additional TeamUnify information guides.
  - b. **My Account & £ My Invoices/Payment** are most relevant to managing the members on the account and financial information.
  - c. **My Meet Results & My Reports** are relevant to your swimmer and competition, these areas will not be expanded on in this guide.
  - d. **More information** – [Club contacts](#) information





5. **My Account / My Account** takes you to your account profile
  - a. **Account** – provides all the account information where you can amend and add email addresses so you receive Club communication via a work email or another parent.
  - b. **Members** – you can amend you and/or your swimmer’s personal details.

The screenshot shows the 'My Account' page for a user named 'Swimmer Guest'. The page is divided into several sections:

- Account Information:** Includes fields for Account Login Email, SE Account Connected (Connected), Account First Name (Swimmer), and Account Last Name (Guest). Buttons for 'Update SE Account Info...' and 'Manage SE Account...' are visible.
- Account Contact Information:** Includes fields for Alternate Email 1, 2, and 3, Mobile 1 and 2, Address 1 and 2, City (London), County (or), Postcode (NW3 3NF), Home Phone, and Work/Mobile Phone.

A 'SAVE' button is located at the bottom right of the form.

6. **My Account / My Account / Payments Schedule** takes you to you payments information, account charges and account invoices (including all historical invoices).
  - a. The **Recurring Charges Summary** will show you how much each swimmer is invoiced monthly and annual membership charges.
  - b. All accounts will have a Parent Membership charge applied annually but if you’re a Masters swimmer or your swimmer is 16+ years you will see a credit of this charge below.
  - c. The **Additional Recurring Charges Summary** shows any credits, concessions and/or donations your account may have applied and the frequency (monthly or annually). Please note, all multi-swimmer concessions are automatically applied in the recurring charges when more than one swimmer is registered on an account, therefore not reflected in this section.
  - d. When clicking on **View Account Invoices** (blue tab) this takes you to the same information you would see by clicking on the £ My Invoice/Payment menu on the left (see page 4).

The screenshot shows the 'Payments Schedule' page for the same user. It features a navigation menu with 'ACCOUNT', 'MEMBERS', 'PAYMENTS SCHEDULE', and 'SWIM LESSONS'. The 'PAYMENTS SCHEDULE' tab is selected. Below the navigation, there are buttons for 'Account Charges' and 'View Account Invoices'. The main content area is divided into two sections:

**Recurring Charges Summary**

Member Charges	Description	Chart of Account	Frequency	Charge Months	Amount
Account Charges	Parent Membership 2020/21	ASA Cat 3 (parents) Annual Registration Fee	Charge Annually	Jan	£6.20

**Additional Recurring Charges Summary**

Additional Charge/Discount	Billed Monthly	Billed Annually	Last Modified	Modified By
Parent Membership N/A	---	-£6.20 Jan	2020-12-29	Yourself



7. **My Account / £ My Invoice/Payment** provides you will all financial account information.
- Account Recurring Charges Summary** – click on the arrow to expand to see these charges your account is invoiced monthly and annually. Please note, these will reflect the same monthly/annual charges as explained above in 6a.
  - Account Charges Summary** – This as it says, just a summary. If the number is a **minus number** then your account is in credit. All numerical **totals** are in red font across the TeamUnify system, so avoid presuming the red font means you have a balance, if there is a minus sign in front of the number, it's credit on the account.
    - The little 'greater than' arrow is actually a link to a TeamUnify which is a video explaining account invoices. You may find this helpful to watch along with these instructions.
  - Current Invoice Summary** – The invoice charges for the current calendar month are outlined and expanded on. Any payments made this calendar month will also be reflected in this summary.
  - Your Total Projected Amount Owed on 01/X** – This total is made up of your current account balance added to your invoice charges NEXT calendar month (monthly training fees and any additional charges – e.g. club kit, membership fees, meet fees, etc.). This is also explained in red font when you expand the section as a reminder (see below).
    - If your account balance in the current month is £0 then the *total projected amount owed* will be next month's training fees as these are invoiced on the 1<sup>st</sup> of every calendar month.
    - If your account balance in the current month is greater than £0, then your *total projected amount owed* will be your current account balance added to next month's training fees when invoiced on the 1<sup>st</sup> of the calendar month. For example, your account balance is £20 and your monthly training fees are £50, so you would expect to see the *total projected amount owed* as £70.
    - If you account is in credit (less than £0), then the *total projected amount owed* will be your fees added to your credit. Therefore the total will be less than your monthly training fees. For example, your account is in credit of £10 and your monthly training fees are £50, so you would expect to see the *total projected amount owed* as £40.

The screenshot shows the 'My Invoices/Payments' section of the website. The 'Account Charges Summary' is expanded, showing the following information:

- Current Total Owed this Month:** £0.00
- Account Status: Paid-In-Full
- Your Total Outstanding Balance: £0.00
- New Charges Posted this Month: £0.00
- Payments You've Made this Month: £0.00

A callout box on the left highlights the 'Current Total Owed this Month' value.

The Total Projected Amount Owed, is NOT what you owe now, rather is a projection of what you will be charged on the first of the next month based on all billing activity during the current month.

This number includes all unpaid charges from the current invoice AND any non-recurring charges, payments or credits applied to your account between the 1st and the last day of this month PLUS the upcoming recurring charges as outlined in the Account Recurring Charges Summary at the top of this screen. Please check back often!



## 7. Continuation of My Account / £ My Invoice/Payment

- e. **Billing History** – This is the most helpful section in TeamUnify and we use this area to answer a majority of queries we receive about accounts. By clicking to expand on this section, you will be able to access every historical TeamUnify invoice held with the Club. As a summary you can see the invoice month, the amount your account has been invoiced (taking into account any credit that may be on your account – as explained in 7diii ), the amount paid to the club in that calendar month and your account balance.
  - i. **Invoice Month** – This is a monthly invoice that is raised on the 1<sup>st</sup> of every calendar month, it includes a total of your previous month charges and payments, then an itemised list of all invoice charges. This invoice is static, therefore any payments made once it has been raised will not be reflected until the next invoice.
  - ii. **Invoice Month** – By clicking on this link and the static invoice opens on a new tab, you will also find at the bottom of the invoice the [Club's bank details and a reminder that the Club does not have direct debit facilities](#), members must contact their bank to arrange/amend payments to CSCSC as we cannot do this for you.
  - iii. **Account Balance view** – This link provides you with historical access to your Invoice Summary (see 7c above). Unlike the *Invoice Month*, this *Account Balance view* is dynamic (and will reflect the *Invoice Summary* in the same calendar month). When a payment is applied against your account, this will be reflected in both your account balance and on the *Invoice Summary*.

**Billing History**

Invoice Month	Current Invoiced Amount	Paid Amount	Account Balance	Status
1 01/01/2021			£0.00 <a href="#">view</a>	Paid-In-Full
2 01/12/2020		£0.00	<a href="#">view</a>	Paid-In-Full
3 01/11/2020		£0.00	<a href="#">view</a>	Paid-In-Full

  

**Invoice Details:**

Previous Invoice	£108.00
Total Payment/Credit	£133.00
Club Kit	£25.00
Monthly TF	£108.00
PARENT/GUARDIAN MEMBER/Monthly TF	£0.00
<b>Amount Due</b>	<b>£108.00</b>

Thank You

  

**Current Invoice Totals**

Posted Date	Admin	Invoice Item Name	Chart of Account	Amount
<b>PREVIOUS CHARGES / PAYMENTS</b>				
Previous Invoice Total				£108.00
Previous Period Payments				£127.70
Previous Account Balance				£-19.70
<b>CHARGES / CREDITS THIS INVOICE</b>				
01/09/19	Bibbings, Krista	Non-Recurring: Parent Membership 19/20	ASA Cat 3 (parents) Annual Registration Fee	£5.20
12/09/19	Bibbings, Krista	Non-Recurring: Club Membership 19/20 -Perf Gold (under 18)	Junior Club Membership	£14.50
01/10/19	Auto Run	Recurring: Monthly TF	Performance Gold TF	£108.00
01/10/19	Auto Run	Recurring: PARENT/GUARDIAN MEMBER/Monthly TF	Monthly Dues	£0.00
<b>Charges / Credits this Invoice</b>				<b>£127.70</b>
<b>Previous Account Balance</b>				<b>£-19.70</b>
<b>Total Balance Owed this Month</b>				<b>£108.00</b>
<b>PAYMENTS MADE THIS MONTH</b>				
03/10/19	Bibbings, Krista	Other-BACS 02/10/2019: TF October 2019		£108.00
<b>Payments Made this Month</b>				<b>£108.00</b>
<b>** Total Outstanding Balance</b>				<b>£0.00</b>

This historical information can be really helpful to see invoiced items and payments applied against your account. It is also worth bringing member's attention to the [Overdue Payment Policy](#) which includes the following statement:

*It is the member's responsibility to login to their account to update contact details, monitor charges invoiced monthly and arrange payments to the Club by bank transfer. If members are having difficulties in facilitating payment or are disputing any fees payable on an invoice, the member must notify the Office Manager in writing within seven (7) calendar days of the relevant invoice charge being posted to the account.*