Event Registration
Quick Start Guide
Event Registration is an online registration system that can populate the Events Calendar with upcoming events as well as create an associated online application for each event to handle registration and/or item purchases.

For further guidance in working with Event Registration forms, consult these complete reference manuals in the Client Online Community:
- Event Registration: Create & Manage Events
- Event Registration: View & Manage Registrations
- Event Registration: Reporting

**Creating and Managing an event will include some or all of the following steps:**

**Choose a default form template and name the event:** Choose the template wisely and remember that each event requires a unique name

**Edit Event Pages to include all event information:** Create and/or modify each line item that will appear on the registration form

**Edit Thank You Page and Confirmation Email:** Customize or use the default pages

**Edit Event Configuration criteria:** Activate the event and set up processing details

**Preview and test event:** Ensure event displays and calculates correctly prior to going live

**Modify and Cancel Registrations:** Provide refunds or modify orders for members

**Create Event Reports:** Create custom reports to capture available information

**General Event Registration Information**

**Basic Event Structure**
1. Each event is composed of multiple pages containing event-related items, a Thank You Page that appears on screen once the registrant's order has completed, and a Confirmation Email that is sent to the email address provided by the registrant.
2. Each event page is composed of multiple sections, for example: Introduction, Event Details, etc.
3. Each section is composed of multiple components, for example: Event Description Text, Billing Address, Guest Name, etc.
4. Additional pages can be added to Events.
5. Additional sections can be added to pages.
6. Additional components can be added to sections.
7. Additional alternate Thank You Pages and Confirmation Emails can be created.

**Basic Event Requirements**
1. Every input box that will be used by the registrant to indicate a quantity or amount ordered must be flagged as an Event Item on the Properties page.
2. Every Event Item must be included in the Total Billable Amount.
3. Every form must include only one Total Billable Amount field that will be sent to the Payment Processor.
4. All Event Items and the total billable amount field MUST be placed on the same Page; they CANNOT be distributed across multiple pages.
5. Use the Hide option for pages, sections and components not currently in use. Do not use the Delete option, as deleted items are difficult to restore.
6. Plan the event details and layout on paper prior to building online to save time and effort. Determine the pages, sections and components required.

**Begin here: Logon to Administration Center**
1. Go to your Administration Center.
2. You will be prompted to log in using your User-ID and Password. For security purposes, three failed attempts to log in will lock your account for up to 2 hours.
3. The screen will refresh with the Administration Center landing page.
4. Click **Forms Management > Events > Create/Manage Events**

### Step 1: Choose a default template and name the event

**Create a new event:**
1. Begin with creating an event form by selecting a default template (choose wisely ~ template types cannot be modified later).
2. Enter an event name and short description (these fields are seen only in the Admin Center). Save.
3. Once the new event appears at the top of the Event List click the Form Name to begin customizing the form.
4. Choose the top tab **Edit Event Pages**, then the Page 1 blue tab. The number of blue Page tabs displaying will depend on the template selected in step 1 above.
5. To view the default format of the event, click the Preview Page (Customer View) button.

### Step 2. Use Visual Edit to customize event details

**Visual Edit mode allows admins to edit form layout and components visually, directly on the form. Using Visual Edit is not required but should be considered for modifying most of the Event Details section.**
1. On the Page 1 tab, click the Visual Edit Mode button.
2. The event form will appear in a new window.
3. Mouse over the various components on the form. Any components that display as highlighted in yellow can be edited.
4. Double-click on the component to be edited; a content box will appear. If the component supports html code the WYSIWYG editor will appear. If the component supports only plain text then the text editor will appear.
5. Make changes, click Save changes.
6. Items not customized using Visual Edit can be edited using the components Properties page.
7. Any event items can be added using Visual Edit at either the top or bottom of the page and must be reordered into proper placement using the Re-order feature.

### Step 3: Add and/or edit Page, Section and Component to include all event information

**To add a Page:**
1. Locate at the top of each Page the button: “Create a new page”. Click on button. A new Page tab will display.
2. Remember that all event items and the total billable amount field must reside on one single page.
   Additional pages can be used for displaying or collecting non-event-item information.

**To add/edit a Section to a Page:**
1. Locate at the bottom of each Page the header “Add a new section to this page:”
2. Enter section name, placement, and click Add Section.
3. Click on Edit link beside section name.
4. New sections will include a header bar that may be edited. Additional sections are often added to enhance visual display of the form components.
5. The Event Guests section must always display PRIOR to the Payment Information Section.
6. The Guest Matching section must always appear on the page FOLLOWING the total billable amount.
<table>
<thead>
<tr>
<th>Default sections that may be included in each event:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Introduction</strong></td>
</tr>
<tr>
<td><strong>Java Script</strong></td>
</tr>
<tr>
<td><strong>Registered Member Prompt</strong></td>
</tr>
<tr>
<td><strong>Event Details</strong></td>
</tr>
<tr>
<td><strong>View Attendance List</strong></td>
</tr>
<tr>
<td><strong>Add to Waiting List</strong></td>
</tr>
<tr>
<td><strong>Personal Information</strong></td>
</tr>
<tr>
<td><strong>Billing Address</strong></td>
</tr>
<tr>
<td><strong>Home Address</strong></td>
</tr>
<tr>
<td><strong>Event Guests</strong></td>
</tr>
<tr>
<td><strong>Payment Information</strong></td>
</tr>
<tr>
<td><strong>Match Guests</strong></td>
</tr>
<tr>
<td><strong>Confirmation</strong></td>
</tr>
</tbody>
</table>

**To add/edit a Component:**
1. Locate at the bottom of the Components Page the heading “Add a new component”.
2. Choose the appropriate Custom Component.
3. Enter the label for display.
4. Enter the identifier for the database. Identifier must be composed of letters, numbers and/or underscores (_).
5. Indicate placement on page.
6. Click Add Component.
7. The component will be added to the list of components; click Edit to the newly added component to enter information.
8. Components are used to add descriptive or instructional information, capture order quantities, etc.

<table>
<thead>
<tr>
<th>Custom Components that may be included in each event:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Component</strong></td>
</tr>
</tbody>
</table>
| **Text Input (Single Line)** | To collect a single line of free-form input, either text (t-shirt color), monetary (donation) or quantity of an item associated with a cost (number of tickets for a concert)  
*This frequently-used option can be used to capture quantity ordered of all items to be purchased or counted in the event. It can display unit price when applicable. When used in this manner, this component must be flagged as an event-item and included in the Total Billable |
<p>|</p>
<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text Input (Multi Line)</td>
<td>To collect multiple lines of free-form input, up to 1000 characters</td>
</tr>
<tr>
<td>Checkbox</td>
<td>To select one or more options of a limited number of choices</td>
</tr>
<tr>
<td>Radio Button List</td>
<td>To display multiple options when only one option can be chosen. Data can be text, numeric, price or quantity</td>
</tr>
<tr>
<td>Display Field</td>
<td>To display informative (plain) text or instructions</td>
</tr>
<tr>
<td>Display Field (Custom HTML)</td>
<td>To display informative HTML text or instructions</td>
</tr>
<tr>
<td>Display Field (Date/Time)</td>
<td>To display a pre-set date</td>
</tr>
<tr>
<td>Dropdown Menu (Custom)</td>
<td>Selections determined by admin; user can choose one or many options</td>
</tr>
<tr>
<td>Dropdown Menu (States/Provinces)</td>
<td>Pre-defined menu of states/provinces; can be edited</td>
</tr>
<tr>
<td>Dropdown Menu (Countries)</td>
<td>Pre-defined menu of countries; can be edited</td>
</tr>
<tr>
<td>Dropdown Menu (Years)</td>
<td>Pre-defined menu of years (use to collect Class Year), can be edited</td>
</tr>
<tr>
<td>Dropdown Menus (Credit Cards, Month, Expiration Years, Start Years)</td>
<td>Pre-defined menus; can be edited</td>
</tr>
<tr>
<td>Calendar Date</td>
<td>Calendar Date selectable by registrant</td>
</tr>
<tr>
<td>Total Billable Amount</td>
<td>Total charges sent to payment processor</td>
</tr>
</tbody>
</table>

**Step 4: Edit Thank You Page and Confirmation Email**

**Thank You Page**
1. Click on Thank You Page tab.
2. Click on “Preview this page” button.
3. If this page meets requirements no additional work is required.
4. If this page does not meet requirements, additional alternate pages can be created and additional data tags can be added to the content.

**Confirmation Email**
1. Click on Confirmation Email tab.
2. Do not disable Confirmation Email(s) unless circumstances require. Registrants should always receive a confirmation of their registration order.
3. Customize the Email Sender & Subject text.
4. Enter Blind Copy email addresses to send a copy of all registration confirmations to a staff member or general email box.
5. Click on “Preview Confirmation Email”. If this page meets your requirements no additional work is required.
6. If this page does not meet your requirements, additional alternate confirmation emails can be created and additional data tags can be added to the content.

**Step 5: Edit Event Configuration criteria**

**Click on Edit Event Configuration tab**, then click on the following sub-tabs:

**Activation:** Forms must be Activated in order to accept and process registrations

**Payment Processing:**
- Payment Processing Type ~ required
- Billable Component ~ required ~ use default if no other billable component has been added to the event
- Currency ~ default is US Dollar
- Credit Cards ~ required unless No Payment Processing option is activated.
- Merchant ID ~ required unless No Payment Processing option is activated
- Processing Server ~ required ~ ALWAYS choose TEST until form goes live then switch to PRODUCTION
- Additional Payment Options ~ not required

**Special Features & Functions**
- All features on this page are optional.
- Order Discount ~ be sure to enable if discounted and no-charge registrations will be offered.

**Categories & Campaigns**
- If this event is to be associated with a Category or Campaign, select from options on this page.

---

**Step 6: Preview and test the event prior to Activation:**

All events should be thoroughly tested prior to going live. These steps should be followed during the testing phase:

1. Activate the event (Edit Event Configuration > Activation).
2. Define the event as non-calendar so that it does not appear on the community events calendar (Edit Event Configuration > Special Features & Functions > Non-Calendar Event).
3. Confirm that the Processing Server is set point to the TEST server so that credit card functionality can be tested. For Cybersource gateways, use this test credit card: VISA, Card #4111111111111111, CVN: 123, Exp date: enter any date greater than day of testing (Edit Event Configuration > Payment Processing > Processing Server).
4. Use small dollar amounts when testing.
5. Enable Confirmation Email(s) so that admin can verify information as it will be displayed in email confirmation that will be received by registrants (Edit Event Pages > Confirmation Email).
6. Test all order variations to ensure proper functioning.
7. Test the attendance list if it has been modified
8. When event is ready to go live change items 2 and 3 as follows:
   a. Remove Non-Calendar status
   b. Set Processing Server to Production server

---

**Step 7: Create Event Reports & Name Tags**

1. Click on Reporting > Form Reports > Event Registration Reports
2. Select Event Name, choose either Detailed or Summary Report.
3. Select Date Range.
4. For Detailed Reports, choose fields on Select Report Criteria tab.
5. Click Display Report tab to see results on screen.
6. Download report to txt or csv format using buttons at bottom of screen
7. For future use of same criteria assign a name to the query and enter into Save This Query box.
8. To create Name Tags, scroll to Name Tag Information section in Select Report Criteria tab. Directions are displayed in the About Name Tag reports link.
9. Test Event Reports prior to going live.

---

**Step 8: Process to Modify or Cancel a Registration**

1. Click on View & Manage Orders tab
2. Identify the correct Event then click on View Registrations
3. Locate member’s order, click on Modify link or Cancel link
4. **Modify** will issue a new order with the new charges, along with a credit for the original order. The member’s credit card number will be required.
5. **Cancel** will issue full credit and offer option to replace any inventory.
**Additional features not covered in this Quick Guide**

Many additional features are available to tailor and customize events:

<table>
<thead>
<tr>
<th>Feature</th>
<th>Feature</th>
<th>Feature</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admin Only Fields</td>
<td>Inventory Control</td>
<td>Shared Inventory</td>
</tr>
<tr>
<td>Availability and Visibility Settings</td>
<td>Order Discounts</td>
<td>User Response Options</td>
</tr>
<tr>
<td>Conditional Pricing</td>
<td>Profile Data Management</td>
<td></td>
</tr>
<tr>
<td>Field Validation</td>
<td>Shared Inventory</td>
<td></td>
</tr>
</tbody>
</table>

For information regarding these and other features please refer to these comprehensive manuals in the Client Online Community Training Center:

- Event Registration: Create & Manage Events
- Event Registration: View & Manage Registrations
- Event Registration: Reporting
- Cybersource (if installed as payment gateway)