Introduction

Event Registration is an online registration system that enables you to 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, when applicable.
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Create and Manage Forms

Create Form

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Enter the form name and description.
4. Select a default template.
5. Click the Create This Form button. See figure 1. The newly created form will appear in the list of forms in alphabetical order, and a Form successfully created, now appears in form list below confirm message will appear at the top of the page.

Notes:
1. The Form Name must be unique. An error message will display if the name is duplicated.
2. Form Name and Description are for the administrator’s use only. They will not display on the front-end of the form. The Form Name will display in Reports.

<table>
<thead>
<tr>
<th>Template Name</th>
<th>Description</th>
<th>Sample Events</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basic event, no guests</td>
<td>1-page event</td>
<td>Wine Cheese, game viewing party, or happy hour</td>
</tr>
<tr>
<td></td>
<td>• Page 1 – Event details, attendance list, wait list, personal info, billing &amp; home address, payment info, &amp; confirmation</td>
<td></td>
</tr>
<tr>
<td>Event with guests</td>
<td>2-page event</td>
<td>Alumni BBQ, golf tournament, or reception</td>
</tr>
<tr>
<td></td>
<td>• Page 1 – Event details, attendance list, wait list, personal info, billing &amp; home address, event guests, and payment info</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Match guests &amp; confirmation</td>
<td></td>
</tr>
<tr>
<td>Event announcement</td>
<td>1-page event</td>
<td>Announce chapter, class, club, or affinity event</td>
</tr>
<tr>
<td></td>
<td>• Event details</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• No submit button</td>
<td></td>
</tr>
<tr>
<td>Multi-page basic event, no guests</td>
<td>2-page event</td>
<td>Conference, seminar, or career networking event</td>
</tr>
<tr>
<td></td>
<td>• Page 1 – Event details, attendance list, and wait list</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Page 2 – Personal info, billing &amp; home address, payment info, &amp; confirmation</td>
<td></td>
</tr>
<tr>
<td>Multi-page guest event</td>
<td>3-page event</td>
<td>Alumni weekend, reunion, or homecoming</td>
</tr>
<tr>
<td></td>
<td>• Page 1 – Event details, attendance list, and wait list</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Page 2 – Personal info, billing &amp; home address, event guests, payment info</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Page 3 – Match guests &amp; confirmation</td>
<td></td>
</tr>
</tbody>
</table>
Manage Form

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section. See figure 2.

Preview Form

Preview will display how the form currently appears to end-users.

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Preview link next to the appropriate form. The Preview Form page will display. See figure 3.
5. Click the appropriate page button to preview.

Required Settings

The Important message alerts the administrator that there are required settings that need to be configured prior to activating the form. Click the View details link to view the required settings.

Note: The links in each bulleted item navigates directly to the appropriate Event Builder page to set that missing configuration.
**Rename Form**
Update the form name and/or description. As in with creating a new form, the form name must be unique.

1. Log into the **Admin Tool**.
2. Click the **Event Forms** link in the left navigation located under Community Services.
3. Scroll down to the **Manage Forms** section.
4. Click the **Rename** link next to the appropriate form. The **Rename this form** page will display. *See figure 5.*
5. Click the **Rename this form** button. The Create & Manage Forms page will display with the updated form name and/or description.

**Copy Form**

1. Log into the **Admin Tool**.
2. Click the **Event Forms** link in the left navigation located under Community Services.
3. Scroll down to the **Manage Forms** section.
4. Click the **Copy** link next to the appropriate form. The **Copy this form** page will display. *See figure 6.*
5. Enter the form name, and update the description, if necessary.
6. Click the **Copy this form** button. The duplicate form will display in the Create & Manage Forms section in alphabetical order. A *“Form successfully copied, new form appears in form list below. Note exact form attributes copied, so please edit to alter configuration”* message will display at the top of the page.

**Delete Form**
Delete will not physically delete the form from the database; instead it is marked as “deleted” in the database and will no longer appear in the Create & Manage Forms menu.

1. Log into the **Admin Tool**.
2. Click the **Event Forms** link in the left navigation located under Community Services.
3. Scroll down to the **Manage Forms** section.
4. Click the **Delete** link next to the appropriate form. The **Delete this form** page will display. *See figure 7.*
5. Click the **Delete this form** button, or click **Cancel** to abort. The Create & Manage Forms page will display without the deleted form. A *“Requested form deleted”* message will display at the top of the page.
**Edit Form**

Edit form sections and components.

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display. *See figure 8.*

![Figure 8](image)

**Visual Edit**

Visual Edit mode allows administrators to edit form layout and components visually. To modify a component, double-click on it, make your changes, and click "Save changes". To move a component, click on the label, then drag and drop to desired location.

**How to edit content in visual edit mode:**

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Visual edit mode button. *See figure 9.* The form will display in Visual Edit Mode. *See figure 10.*
6. Double-click on the text you wish to modify. The edit text field will appear directly beneath the selected text.

![Figure 9](image)

![Figure 10](image)

7. Enter the appropriate modifications.
8. Click **Save changes**, click **Cancel** to abort, or click **Remove**. **Processing...** will display while the modifications are being saved, and the page will refresh with the new content. *See figure 11.*
**WYSIWYG HTML Editor**


**How to edit HTML content in visual mode:**

1. Log into the **Admin Tool**.
2. Click the **Event Forms** link in the left navigation located under Community Services.
3. Scroll down to the **Manage Forms** section.
4. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
5. Click the **Visual edit mode** button. The form will display in Visual Edit Mode.
6. Double-click on the text you wish to modify. The edit text field will appear directly beneath the selected text.
7. Enter the appropriate modifications.
8. Click **Save changes**, click **Cancel** to abort, or click **Remove**. **Processing...** will display while the modifications are being saved, and the page will refresh with the new content. See figure 12.

**Note:** Some HTML tags are supported for text Display Fields; however, the page will need be Refreshed to see the HTML changes. See figure 13. Bold tags were added around “Submit my gift”.

![Figure 12](image12.png)

![Figure 13](image13.png)
Manage Sections

Re-order Sections
1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display. Change the display order numbers next to the appropriate form section.
5. Click the Re-order button. The Edit Page will refresh with the sections in the new order.

Add Section
1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Scroll down to the Add a new section to this page. See figure 14.
6. Enter the new section name.
7. Determine where the new section should display: First, Last, or After Section (enter an existing section number).
8. Click the Add section button. The Edit Page will refresh with the new section displayed. See figure 15.

Notice the section name is italicized, which means the section is hidden to the end users.

9. Click the Show link to show the section to the front-end user.

IMPORTANT!
A new section will show only once the header component has been flagged to show.

10. Click the Edit link next to the section.
11. Click the Show link next the header component.
**Edit Section Header Name**

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Edit link next to the section you wish to rename. The Edit Section <section_name> page will display. See figure 16.
6. Click the Edit link next to the section header component. The Edit Component <component_name> page will display. See figure 17.
7. Update Display Text.
8. Click the Save Changes button, or click Cancel to abort.

**Rename Section**

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Rename link next to the section you wish to rename. The Rename <section_name> page will display. See figure 18.
6. Enter the new section name.
7. Click the Rename this section button.

**Delete Section**

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Delete link next to the section you wish to delete. The Delete Section <section_name> page will display. See figure 19.
6. Click the Delete this section button, or click Cancel to abort.
Show/Hide Section

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Show/Hide link next to the section you wish to show or hide. The Show/Hide this section page will display. See figures 20.
6. Click the Show/Hide this section button. The Edit Forms page will display with the appropriate Visible icon next to the section.

Visible Icons

<table>
<thead>
<tr>
<th>Visible Icons</th>
<th>Visible Section</th>
<th>Hidden Section</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><img src="image1" alt="Visible Section" /></td>
<td><img src="image2" alt="Hidden Section" /></td>
</tr>
</tbody>
</table>

Manage Components

Re-Order Components

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display. See figure 21.
5. Change the display order numbers next to the appropriate form section.
6. Click the Re-order button. The Edit Page will refresh with the sections in the new order.

Add Component

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Edit link next to the section. The Edit Section <section_name> page will display.
6. Scroll down to the Add new component area. See figure 22.
7. Choose the type of custom component to add.
8. Enter label for display, text seen by front-end users.
9. Enter the identifier, back-end name stored in database.
10. Select the component placement.

Note: The Fixed Component feature is not currently used.

11. Click the Add component button. The newly added component will display in the list of components italicized, which means the component is hidden.
12. Click the Show link next the new component. The Show this component page will display.
13. Click the Show this component button, or Cancel to abort.
**Custom Component Types:**

<table>
<thead>
<tr>
<th>Component Type</th>
<th>Icon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text Input (Single Line): basic single line of input</td>
<td>![INPUT]</td>
</tr>
<tr>
<td>Text Input (Multi Line): a textbox/text area input area</td>
<td>![MULTILINEINPUT]</td>
</tr>
<tr>
<td>Checkbox: a single checkbox</td>
<td>![CHECKBOX]</td>
</tr>
<tr>
<td>Radio Button List: a radio button list containing an option list you will be creating</td>
<td>![RADIO_LIST]</td>
</tr>
<tr>
<td>Display Field: straight text to be displayed in the form</td>
<td>![TEXT]</td>
</tr>
<tr>
<td>Display Field (Custom HTML): HTML to be displayed in the form</td>
<td>![HTML]</td>
</tr>
<tr>
<td>Dropdown Menu (Custom): a dropdown list containing a custom option list</td>
<td>![CUSTOM]</td>
</tr>
<tr>
<td>Dropdown Menu (State/Provinces)</td>
<td>![STATES]</td>
</tr>
<tr>
<td>Dropdown Menu (Countries)</td>
<td>![COUNTRIES]</td>
</tr>
<tr>
<td>Dropdown Menu (Years)</td>
<td>![YEARS]</td>
</tr>
<tr>
<td>Dropdown Menu (Credit Cards)</td>
<td>![CC]</td>
</tr>
<tr>
<td>Dropdown Menu (Months)</td>
<td>![MONTHS]</td>
</tr>
<tr>
<td>Dropdown Menu (Expiration Years)</td>
<td>![EXP_YEARS]</td>
</tr>
<tr>
<td>Dropdown Menu (Recurring Billing Frequency)*</td>
<td>![FREQUENCY]</td>
</tr>
<tr>
<td>Total Billable Amount</td>
<td>![TOTAL]</td>
</tr>
<tr>
<td>Start Date</td>
<td>![DATE]</td>
</tr>
<tr>
<td>Fixed Link: a link used for the Attendee List, Waitlist, and Add A Guest features</td>
<td>![FIXED_LINK]</td>
</tr>
<tr>
<td>Fixed HTML: a component used for the Matching Guests feature</td>
<td>![HTML]</td>
</tr>
<tr>
<td>Calendar Date*</td>
<td>![Fixed]</td>
</tr>
<tr>
<td>Preset**</td>
<td>![PRESET]</td>
</tr>
</tbody>
</table>

*Indicates custom components specifically for Recurring Payment option.

** The Preset component has been mapped to a preset profile dropdown, so its options list cannot be added to, modified, or deleted from here. Modifications must be submitted to your Client Relations Manager.
Edit Component Properties
1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Edit link next to the section. The Edit Section <section_name> page will display.
6. Click the Edit link next to the component. The component properties will display. See the different component property pages below.

Edit Text Input (Single Line) Component
1. Edit Label. See figure 23.
2. Edit Maximum characters allowed. 40 characters is the default.
3. Edit Field Display Size. 200 pixels is the default.
4. Set Initial value. This field will be pre-populated with the value you enter here.
5. Check the This is an input field for a monetary amount checkbox to display a dollar sign in front of the text input field.
6. Check This is an input field for an item quantity checkbox if this is quantity event item.
7. The Item Details section will display. See figure 24.
8. Enter the Item price.
9. Select whether Inventory control is On/Off. If the Inventory control is set to on, the Inventory Details section will display. See figure 25.
10. Enter the Total units.
11. Select the When inventory is depleted option.
12. Check the This is an event item checkbox, if this is an event item.

Suggestion: Add “disabled” to the Additional Tag Elements field for required Registration Fee event items.

13. Click the Save Changes button, or Cancel to abort.
Shared Inventory

Shared inventory allows administrators to setup multiple ticket types to pull from the same inventory. For example: There are 200 available tickets. The different ticket types are alumni and non-alumni tickets or adult and children tickets.

How to activate share inventory:

1. Create the first ticket type as a Text Input (Single Line) Component.
2. Edit the first ticket type as a Text Input (Single Line) Component, and set the Inventory Control to On.
3. Enter the numbers of tickets as the Total Units.
4. Select the When inventory is depleted option.
5. Click the Save Changes button.
6. Return to the Event Details page.
7. Create the second ticket type.
8. Click to edit the second ticket type.
9. Check the This is an event item checkbox.
10. Click the Save changes button. The page will refresh.
11. Check the This is an input field for an item quantity checkbox. The item details section will expand.
12. Select the Shared radio button. See figure 26. The Inventory details section will expand.
13. Select the Inventory control item from the dropdown menu. See figure 27.
14. Select the When inventory is depleted option.
15. Click the Save Changes button.
16. Return to the Event Details page.
Conditional Pricing

Conditional pricing allows administrators to setup multiple pricing levels based on the registrant’s profile data and/or the date of registration.

Profile Data
Administrators can set pricing based on the value of a field in the database. In the figure below, the Alumni Discount will display for all registrants with Membership Type = "alumni".

Date of Registration
Administrators can set an early bird price point that will only display during the date range indicated. In the figure below, the Early Bird Special will display from Sept. 1, 2008 1:00 AM Eastern to November 4, 2005 11:55 PM Eastern.

IMPORTANT!
The registrant must login for the Profile Data criteria function to be enabled.

Administrators can set pricing using both criteria options, Profile Data and Date of Registration. In the figure below, the Alumni Discount will display for all registrants with Membership Type = "alumni" from Sept. 1, 2008 1:00 AM Eastern to November 4, 2005 11:55 PM Eastern.

Note: If multiple conditions match for a particular registrant, the least expensive level displays.
How to activate conditional pricing:

1. Create the event item as a Text Input (Single Line) Component. The page will refresh.
2. Click the Edit link next to the newly created event item. The Edit Component page will display.
3. Check the This is an input field for an item quantity checkbox. The Item details section will expand.
4. Enter Default item price.
5. Set Conditional Pricing to On. The Add a price level link will appear. See figure 28.
6. Click the Add a price level link. The Price level section will expand.
7. Enter Price level name. **Note:** This name will not display to the customer.
8. Enter the Price.
9. Select the Criteria for this price level (Use profile date and/or use dates).

**Using Profile Data:**
10. Select the profile date field from the dropdown menu. See figure 29.
11. Select is equal to or is not equal to.
12. Enter value.

**Using Dates:**
13. Enter the Start and End date. See figure 30.
14. Click Save Changes button, or Cancel to abort.

**Suggestion:** Test profile criteria conditional pricing using decoy accounts prior to opening the event to all users.
Edit Text Input (Multi Line) Component

1. Edit **Label**. See figure 31.
2. Edit **Maximum characters allowed**. 50 characters is the default.
3. Edit **Field Display Height** and **Width**. 400 pixels is the default width.
4. Click the **Save Changes** button, or **Cancel** to abort.

![Figure 31](image)

Edit Checkbox Component

1. Edit **Label**. See figure 32.
2. Set **Initial Setting** to Checked or Unchecked.
3. Click the **Save Changes** button, or **Cancel** to abort.

![Figure 32](image)
**Edit Display Field Component**

1. Edit Display Text. See figure 33.
2. Check Section Header Indicator.

**IMPORTANT!**
The Display Text is what will actually display for this component rather than the label for display.

**Add Radio Button Component**

1. Edit Type of option list (Data or Numeric).
2. Edit Option List. See figure 34.
   a. Click the Edit link next to Option1. The Edit Multiple Choice Group Option "option_1" page will display. See figure 35.
   b. Edit Display Label.
   c. Edit Internal Label.
   d. Enter an optional numeric value.
   e. Click Save Changes, or Cancel to abort.
   f. Repeat steps a-e for option 2.
3. Add additional options.
   a. Enter the Display Label. See figure 36.
   b. Enter the Internal Label.
   c. Enter an optional numeric value.
   d. Click the Add this option button.
   e. Repeat steps a-d for each additional option.
4. Click Save Changes, or Cancel to abort.
Add Display Field (Custom HTML) Component

1. Insert HTML code in the Display HTML field. See figure 37.
2. Click Save Changes, or Cancel to abort.

Add Drop Down (Custom) Component

1. Edit Type of option list (Data or Numeric).
2. Edit Label.
4. Edit User Selections. Default only one selection.
5. Enter Maximum number of selections.
6. Edit Option List. See figure 38.
   a. Click the Edit link next to Option1. The Edit Multiple Choice Group Option "option_1" page will display. See figure 39.
   b. Edit Display Label.
   c. Edit Internal Label.
   d. Enter an optional numeric value.
   e. Click Save Changes, or Cancel to abort.
   f. Repeat steps a-e for option 2.
7. Add additional options.
   a. Enter the Display Label. See figure 40.
   b. Enter the Internal Label.
   c. Enter an optional numeric value.
   d. Click the Add this option button.
   e. Repeat steps a-d for each additional option.
8. Click Save Changes, or Cancel to abort.
Modify Pre-Defined Dropdown Menu

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Edit link next to the section. The Edit Section <section_name> page will display.
6. Click the Edit link next to the pre-defined dropdown component. The component properties page will display. See figure 41.
7. Click the Edit This List button. The list will then be displayed as an editable dropdown list. See figure 42.

**Note:** Administrators can Edit, Delete, and Hide options; however, they cannot Add additional options or change Internal Labels.

Move Component

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Edit link next to the section. The Edit Section <section_name> page will display.
6. Click the Edit link next to the component. The component properties will display.
7. Select the section to move the component to from the dropdown menu. See figure 43.
8. Click Save Changes, or Cancel to abort.
**Require Component**

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Edit link next to the section. The Edit Section <section_name> page will display.
6. Click the Edit link next to the component. The component properties will display.
7. Click the User Response Specifications link at the top of the component Properties page. The User Response Specification page will display.
8. Select the Required radio button. See figure 44.
9. Click the Save Changes, or Cancel to abort.

OR

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Edit link next to the section. The Edit Section <section_name> page will display.
6. Click the icon ((steps) in the User Response field. See figure 45. The Set component to REQUIRED confirm page will display. See figure 46.
7. Click Make this component required button, or click Cancel to abort. The list of components page will refresh and a "Requested component set to REQUIRED" message will display at the top of the page.

**Convert Required Component to Optional**

Follow the same process for setting an optional component as required except select the Optional radio button.

When using the User Response icon, the system will warn you about required items need for successful transaction processing.

**IMPORTANT!**

Setting a required component to "optional" may result in a transaction processing error due to inadequate information being passed to the payment server when a customer submits the form.

Be sure the component is not required for processing.

**Required Fields**

There are several fields that will be sent to the payment processor for credit card authorization and billing processing, and so are necessary to keep (and to keep marked on the form as required fields) for this credit card processing to work:

<table>
<thead>
<tr>
<th>Label for display</th>
<th>Identifier</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name:</td>
<td>home_firstname</td>
</tr>
<tr>
<td>Last Name:</td>
<td>home_lastname</td>
</tr>
<tr>
<td>Address1:</td>
<td>billing_address1 or home_address1</td>
</tr>
<tr>
<td>State:</td>
<td>billing_state or home_state [if US or Canada]</td>
</tr>
<tr>
<td>Zip:</td>
<td>billing_zip or home_zip [if US or Canada]</td>
</tr>
<tr>
<td>Country:</td>
<td>billing_country or home_country [if non-US]</td>
</tr>
<tr>
<td>Credit card expiration month:</td>
<td>cc_exp_month</td>
</tr>
<tr>
<td>Credit card expiration year:</td>
<td>cc_exp_year</td>
</tr>
<tr>
<td>Credit card number:</td>
<td>cc_number</td>
</tr>
<tr>
<td>Credit card verification number:</td>
<td>cc_cvn optional</td>
</tr>
</tbody>
</table>
The default values are shown here. These are initialized as the monetary fields when a form is created. However the component used for this data can be altered in the Edit Form Configuration > Payment Processing Options tab, in the Billable Component section.

**Important!**
Administrators must update **State** and **Postal Code** components to accommodate international users:

1. Change **State & Postal Code** from **Required** to Conditionally required, based on the specifications below.
2. Set the Conditional Trigger for billing_country = US or CA (Canada).

**Validate Component**

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Edit link next to the section. The Edit Section <section_name> page will display.
6. Click the Edit link next to the component. The component Properties will display.
7. Click the Validation link at the top of the component properties page. The Validation page will display. See figure 47.
8. Set the appropriate validation.
9. Click Save Changes, or Cancel to abort. The page will refresh and a “Validation specifications successfully updated” Message will display at top of the page.

**Validation**

There is additional field validation performed by the processing servlet on the following fields, as follows:

<table>
<thead>
<tr>
<th>Label for display</th>
<th>Identifier</th>
<th>Validation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email:</td>
<td>home_email</td>
<td>• <a href="mailto:xxx@xxx.xxx">xxx@xxx.xxx</a> format</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• &gt;6 characters in length</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• No blanks</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Allowed characters: letters, numbers, _, -, @, +, .</td>
</tr>
<tr>
<td>Phone:</td>
<td>phone_day</td>
<td>• 7-20 characters in length</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Allowed characters: numbers, -, +, (, )</td>
</tr>
<tr>
<td>Credit card number:</td>
<td>cc_number</td>
<td>Card Type</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Visa</td>
</tr>
<tr>
<td></td>
<td></td>
<td>MasterCard</td>
</tr>
<tr>
<td></td>
<td></td>
<td>American Express</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Discover</td>
</tr>
</tbody>
</table>
Profile Data Relationship

Profile Data Relationship enables administrators to map specific data from a user's profile to be displayed in a specific component on the form and/or choose the relationship between updates made on the form and the user's profile data.

**How to activate profile data relationship:**

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Edit link next to the section. The Edit Section <section_name> page will display.
6. Click the Edit link next to the component. The component Properties will display.
7. Click the Profile Data Relationship link at the top of the component properties page. The Profile Data Relationship page will display. See figure 48.
8. Check the Display profile data in this component checkbox.
9. Select Profile data from the list of data fields.
10. Click Save Changes, or Cancel to abort. The page will refresh and the Your profile data display settings have been saved confirmation will display at the top of the page.

**IMPORTANT:**

The Event Form application will alert you of the current Profile Data Management settings. If the settings indicate that any data changes made to this form by the customer will not be saved to their profile, a link to change the Profile Data Management settings will be provided.
Manage Pages

Create Page
1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Create Page button at the top of the page. See figure 49. A confirm page will display.
6. Click the Create new page button, or Cancel to abort. The Edit Forms page will display with the new page tab at the top. See figure 50.

Note: Modify the text on the Submit button on page 1 to Next or Continue.

Edit Page Properties
1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the page tab.
6. Click the Edit Page Properties button at the top of the page.
7. Select when the page should display. See figure 51.
8. Click Save Changes, or Cancel to abort.
Move Section to New Page
1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Edit link next to the appropriate Section. The Edit Section "<section_name_here>" page will display.
6. Click the Move this section to new page button. See figure 52.
7. Select the page number from the drop down. See figure 53.
8. Click the Move this section button, or Cancel to abort. The Section moved to new page confirmation will appear at top of page 1.

Preview Current Page
Click the Preview this page button at the top of the screen. See figure 54.

Delete Page
1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Page # tab at the top of the page.
6. Click the Delete this page button at the top of the screen. See figure 55.
Thank You Page

Edit Thank You Page
1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Thank You Page tab at the top of the page. See figure 56. The Thank Page will display in edit mode.
6. Modify the content in the text area provided. See figure 57.
7. Click Save Changes, or Cancel to abort.

Preview Thank You Page
1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Thank You Page tab at the top of the page. See figure 56. The Thank Page will display in edit mode.
6. Click the Preview this page button (Preview this page) at the top of the page. A new browser window or tab will open with the default Thank You page displayed. See figure 58.

Event Registration
Thank you for signing up to this event.
Your credit card has been charged.
We recommend you print this page for your records.
Name: Rocco Mitchell
Processing Date: 08/06/2008 20:37:43
Charge Amount: 25.00
Address: 1349 Sea Breeze Circle
Chesapeake, VA 23320
Phone: Email: rspivey@harrisconnect.com
Charge Confirmation Number: EX02-1394-781117

Figure 58

IMPORTANT!
An administrator must successfully complete the event form to view the actual Thank You page.
Dynamic Data Tags

Administrators are allowed to insert data from the submitted form into the confirmations, such as the user's name and address. Below is a list of pre-defined tags and the data they represent:

<table>
<thead>
<tr>
<th>Tag</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>%ORDERDATE%</td>
<td>Date of submitted form</td>
</tr>
<tr>
<td>%ORDERDATETIME%</td>
<td>Date and Time of submitted form</td>
</tr>
<tr>
<td>%FIRSTNAME%</td>
<td>First name of user</td>
</tr>
<tr>
<td>%LASTNAME%</td>
<td>Last name of user</td>
</tr>
<tr>
<td>%EMAIL%</td>
<td>Email address of user</td>
</tr>
<tr>
<td>%STREET1%</td>
<td>Address: Street (line 1) of user</td>
</tr>
<tr>
<td>%STREET2%</td>
<td>Address: Street (line 2) of user</td>
</tr>
<tr>
<td>%CITY%</td>
<td>Address: City of user</td>
</tr>
<tr>
<td>%STATE%</td>
<td>Address: State of user</td>
</tr>
<tr>
<td>%ZIP%</td>
<td>Address: zip/postal code of user</td>
</tr>
<tr>
<td>%COUNTRY%</td>
<td>Address: country code of user</td>
</tr>
<tr>
<td>%PHONE%</td>
<td>Phone number of user</td>
</tr>
<tr>
<td>%AMOUNT%</td>
<td>Payment amount</td>
</tr>
<tr>
<td>%MASKEDCREDITCARDNUMBER%</td>
<td>Credit card number (note first 11 numbers are asterisks, only last 4 or 5 numbers displayed)</td>
</tr>
</tbody>
</table>

In addition to the pre-defined dynamic tags listed above, you may include tags within the text of your confirmation page to display the data entered by the user into certain customized components in this form. Below is a sample of these tags. The section of the form in which the customized component displays in is listed below for your reference.

<table>
<thead>
<tr>
<th>Tag</th>
<th>Section</th>
</tr>
</thead>
<tbody>
<tr>
<td>%EX02_gift_dedication_name%</td>
<td>Gift Information</td>
</tr>
<tr>
<td>%EX02_my_dedication%</td>
<td>Gift Information</td>
</tr>
</tbody>
</table>

Enter the identifier for the custom component in “%%”: %IDENTIFIER%
Confirmation Email

**Edit Confirmation Email**

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Confirmation Email tab at the top of the page. See figure 59. The Confirmation Email will display in edit mode.
6. Enter the “From” Email Address. See figure 60.
7. Modify content in the text area provided. See figure 61.
8. Enter blind carbon copy email addresses. One email address per line. See figure 62.
9. Click Save Changes, or Cancel to abort.

---

**Disable Confirmation Email**

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Confirmation Email tab at the top of the page. The Confirmation Email will display in edit mode.
6. Check the Disable Confirmation Email checkbox. See figure 63.
7. Click Save Changes, or Cancel to abort.

---

*Note: Dynamic data tags can be added to the Confirmation Page.*
Multiple/Conditional Thank-You pages & Confirmation Emails

Administrators can now create more than one version of the Thank-you page and Confirmation Email for a given form, and apply conditions to determine which is delivered based on how the form has been filled out. For example, if a form accepts either one-time-only payments or recurring payments, the Thank-you page can be different based on the customer payment option.

How to set the default Thank-you/Confirmation page:
1. Click on the appropriate Edit Version link to edit the Thank-you/Confirmation Email page.
2. Click on the Edit Page Properties button.
3. Select the option This is the default Thank-you page/Confirmation email and save your changes.

How to create multiple Thank-you pages:
1. Click on the Create an alternate Thank-you page/Confirmation email button. See figure 64. The Create a new thank you page/confirmation email will display.
2. Click the Create a new thank you page/confirmation email button to confirm that you want to create the page. See figure 65. A “Your new thank you/confirmation email page has been created” onscreen confirmation will display.

Each Thank-you page/Confirmation email created will have a version “letter” assigned to it. The original Thank-you page/Confirmation email will be referred to as Version A, and additional Thank-you pages will be referred to as Version B, Version C, etc.

3. Click on the appropriate Edit Version link to edit the new Thank-you page/Confirmation Email. See figure 66.
4. Edit the Thank-you page/Confirmation Page text as necessary and save your changes.
5. Click on the "Edit page properties" button.
6. Select the option for This Thank-you page/Confirmation email will only display when a user selects the ‘Conditional Trigger’ specified below. See figure 67.
7. Select the criteria under which the Thank-you page/Confirmation email will display (the Conditional trigger) and save your changes. See figure 67.
8. Set the default Thank-you page/Confirmation email.
9. When a form has multiple Thank-you pages/Confirmation emails, one of them MUST be designated as the
default on the Edit Page Properties page. The default Thank-you page/Confirmation email will display when none of the conditions specified in the other versions are met upon form submission.
Exercise #1: Create and Modify An Event

In this exercise we will create and modify a basic Wine & Cheese event.

To complete this exercise:
1. Go to your Event Forms tool, and login OR go to http://admin.alumniconnections.com/olc/admin/LV8/admin_tool/ and login as: uc2008admin3/p4ssword
3. Click the Edit link next to the newly created event form.
4. Click the Visual Edit button at the top of the page.
5. Update Title, Location, Description, & Event item name with the information below.

| Wine & Cheese Event |
The event is cordially invited to join us on Wednesday, September 10, 2008 at our annual Wine event to be held at the beautiful Gangi Gallery.

Time: 7:00-10:00 PM
Location: Gangi Gallery 1500 Old Mill Road, White Plains, NY 10577
Tickets: $75.00
Details: Maxwell Kensington, world renowned Wine Consultant, will provide a roadmap for matching various cheese types with the wines that best suit them. He will introduce cheese basics, including milk types, textures and flavors as well as how to shop for, care for, and serve fine cheeses. Then he'll guide you through choosing wines that complement each cheese type. You'll be invited to sample some of the cheese and wine pairings and discover marriages that suit your own personal taste.

For directions go to http://www.mapquest.com

6. Return to the Event Forms application.
7. Click the Edit link next to the Event Details section.
8. Update the Event Date Text to September 10, 2008 – 7:00 PM.
9. Update the Event End Date Text to September 10, 2008 – 10:00 PM.
10. Set the Ticket price to $75.00.
11. Click the Edit Page 1 link at the top of the page.
12. Hide the Home section.
13. Click to Edit link next to the Personal section.
14. Click to hide the Middle Name field.
15. Flag the Daytime Phone Number to required.
16. Click to hide the Event Phone Number.
17. Click the Edit Page 1 link at the top of the page.
18. Click to Edit link next to the Payment Information section.
19. Click to hide the CVN Number field.
20. Click the **Thank You Page** tab at the top of the page.
21. Add “Ticket(s) Purchased: %event_item1% at $75.00 each”. Be sure to duplicate the HTML table tags.
22. Click **Save Changes**.
23. Click the **Confirmation Email** tab at the top of the page.
24. Enter the "**From**" Email Address.
25. Update the **Confirmation Email Subject**.
26. Add your email address to the **Enter bcc: Email Addresses**.
27. Click **Save Changes**.

**If you finish early...**

- Add the following as an HTML custom component at the top of the event in Visual Edit mode.

  **Wine & Cheese Event**
  
  *Join us for a fine selection of wines and cheese from around the world.*

- Add a **Special Needs** Text Input (Single Line) custom component to the Event Details section.

- Set the **Ticket Inventory** (Total Units) to 200, and have the system Disable the form and display the following message: *Sorry, the Wine & Cheese Event (Wed. Sept. 10, 2008) is Sold Out.*
Edit Form Configuration

Activation

The Activation feature allows an administrator to activate/deactivate a form as needed. A “form is temporarily unavailable” message is displayed when a user attempts to access an inactive form.

How to activate/deactivate a form:

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Activation link next to the appropriate form. The Activation page displays. See figure 68.
5. Select Activate form, Deactivate form, or Activate form based on dates below.

   If entering a date range of when the form is accessible, check the Enable checkbox.

6. Click Finish, or Cancel to abort.

Figure 68
Payment Processing

Setup Payment Processing
1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Edit Form Configuration tab at the top of the page. The payment processing options will display. See figure 69.
6. Select Payment Processing Type (CyberSource, TouchNet, or Offline Payment Processing).
7. Click Continue. An “Are you sure” page will display. See figure 70.
8. Click Change. The full payment-processing page will display. See figure 71.

Edit Payment Processing Options
9. Select accepted Credit Card types.
10. Enter Labels to display for Custom Cards, if applicable.
11. Select Credit Card Component (radio buttons or dropdown menu). Dropdown menu is the default.
12. Select the Merchant ID.
13. Select the appropriate Processing Server (Test or Production).
14. Click the Finished button. The Change Payment Processing Options Confirmation page will display. See figure 72.
15. Click Change.

Note: All institutions/associations may not be configured to accept recurring payments. Please contact your Client Relations Manager if you are interested in this functionality.
IMPORTANT!
Administrators have the ability to set an event as Offline Payment Processing.
Recurring Billing

Event forms can now be configured to allow users to pay in multiple payments over a selected period of time. See figure 73. The Reporting feature has been enhanced to provide information to manage recurring transactions. Available for Internet merchant account enabled client using the CyberSource gateway. **Note: This feature was adopted from the Donation/Membership Forms application.**

---

**Gift Information**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gift designation</td>
<td>-- Select --</td>
</tr>
<tr>
<td>Gift Amount</td>
<td>$</td>
</tr>
</tbody>
</table>

If you prefer to donate with recurring payments, check the Recurring Payments box, then enter the number and frequency of payments below. The amount entered in Gift Amount above will be the amount of each payment.

- [ ] Recurring Payments
- Number of payments: [ ]
- Payments frequency: -- Select --
- Start date: [April 2 2007]

---

**How to configure a form to accept recurring payments as a payment option:**

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Maintenance.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Edit Form Configuration tab at the top of the page.
6. Scroll down to the Recurring Payments section; select the Recurring payments accepted option.

**IMPORTANT!**

If Recurring Payments WILL NOT be accepted, select the Recurring payments not accepted option and ignore the rest of the Recurring Billing section.

7. **Confirm** that the Merchant ID you are using for this form is configured to accept recurring payments. Confirm this by contacting CyberSource.
8. **Create** the form components necessary for processing recurring payment requests.

There are four form components, which must be included on all forms on which Recurring Payments are accepted. In addition, there is one component, which may be used if you choose to allow customers to specify a start date for their recurring payments. All five components are described below.

Create these components as you normally would under the Edit Form Pages tab. You may name and label the components however you please.

Once the components are created, return to the Edit Form Configuration tab and follow the instructions in step #9 below.
9. **Map** your form components for CyberSource.

In order for Recurring Payment Billing to be correctly processed by CyberSource, you must indicate which form components contain the data that CyberSource needs for this type of processing. This is called "mapping". To map the form components for CyberSource:

a. Select the **Edit Form Configuration** tab.
b. In the "Recurring Payments" section, under **Map Form Components for Recurring Payments**, select the appropriate form component (i.e. from the components that you created in step #8) for each of the values listed. See figure 74.

<table>
<thead>
<tr>
<th>Value to collect</th>
<th>Component type to use</th>
<th>Necessary?</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recurring Payment request</td>
<td>Checkbox</td>
<td>Always necessary</td>
<td>Customer checks this checkbox to indicate they wish to pay via the recurring payment option.</td>
</tr>
<tr>
<td>Recurring Payment Amount</td>
<td>Single Line Input for Dollar Amount</td>
<td>Always necessary</td>
<td>Customer enters the dollar amount of each recurring payment.</td>
</tr>
<tr>
<td>Recurring Payment Frequency</td>
<td>Frequency Dropdown Menu</td>
<td>Always necessary</td>
<td>Customer selects the frequency of recurring payments, as in weekly, monthly, etc.</td>
</tr>
<tr>
<td>Number of Recurring Payments</td>
<td>Single Line Input</td>
<td>Always necessary</td>
<td>Customer enters the number of recurring payments.</td>
</tr>
<tr>
<td>Recurring Payment Start Date</td>
<td>Calendar Date</td>
<td>Only necessary if the form allows customers to specify a start date for their recurring payments. If this component is not included on the form, the start date will be the current date.</td>
<td>Customer selects what date they want their recurring payment to start on.</td>
</tr>
</tbody>
</table>

**Figure 74**

Map Form Components for Recurring Payment Processing:

For each of the values listed below, select the appropriate form component (i.e., from the components that you created in step #8) for each of the values listed. The values entered in these components by the customer will be passed through to CyberSource for payment processing.

- Recurring Payment request
- Recurring Payment amount
- Recurring Payment frequency
- Number of Recurring Payments
- Recurring Payment Start Date (optional)
**Special Features & Functions**

Special features & functions allows administrators to set additional configure options such as Forced Authentication, Single-Submit Only, Attendance List, Wait List, and Matching Guests.

**Forced Authentication** limits access to this form to registered community members. Customers will need to enter their community User ID and Password in order to view and submit the form.

**How to activate forced authentication:**

1. Log into the **Admin Tool**.
2. Click the **Event Forms** link in the left navigation located under **Community Maintenance**.
3. Scroll down to the **Manage Forms** section.
4. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
5. Click the **Edit Form Configuration** tab at the top of the page. The Payment Processing page will display by default.
6. Click the **Special Features & Functions** tab. The Special Features & Functions page will display.
7. Check the **Turn on Forced Authentication for this form** checkbox. See figure 75.
8. Click **Finished**, or Cancel to abort. The page will refresh and the **Update successful** confirmation will display at the top of the page.

![Figure 75](image_url)
**Single-Submit Only** limits this form to one submission per customer. Customers who attempt to submit the form a second time will see a friendly message explaining that only one form submission is allowed. This feature can only be enforced for customers who are **authenticated** when using this form.

**How to activate single-submit only:**

1. Log into the **Admin Tool**.
2. Click the **Event Forms** link in the left navigation located under **Community Maintenance**.
3. Scroll down to the **Manage Forms** section.
4. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
5. Click the **Edit Form Configuration** tab at the top of the page. The Payment Processing page will display by default.
6. Click the **Special Features & Functions** tab. The Special Features & Functions page will display.
7. Check the **Turn on Single-submit Only for this form** checkbox. See **figure 76**.
8. Click **Finished**, or Cancel to abort. The page will refresh and the **Update successful** confirmation will display at the top of the page.
Attendance List is used to show a list of confirmed attendees on your event registration page. A View Attendance List link will display under the event description. When users click the link, they will see a popup window that displays all the attendees that have registered for the event. The Attendance List is active by default on all events.

**How to view the attendance list:**

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Maintenance.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Edit Form Configuration tab at the top of the page. The Payment Processing page will display by default.
6. Click the Special Features & Functions tab. The Special Features & Functions page will display.
7. Click the View current attendance list link. See figure 77. The current attendance list will display. See figure 78.
Administrators may need to add offline registrants to the attendance list.

**How to add an attendee to the attendance list:**

1. Log into the **Admin Tool**.
2. Click the **Event Forms** link in the left navigation located under **Community Maintenance**.
3. Scroll down to the **Manage Forms** section.
4. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
5. Click the **Edit Form Configuration** tab at the top of the page. The Payment Processing page will display by default.
6. Click the **Special Features & Functions** tab. The Special Features & Functions page will display.
7. Click the View current attendance list link. The current attendance list will display.
8. Click the **Add a new attendee** link. See figure 79. The Attendee details page will display. See figure 80.
9. Complete the form.
10. Click **Save changes**, or **Cancel** to abort. The Event Attendance page will refresh with the newly added attendee details displayed.

![Figure 79](image)

![Figure 80](image)
How to modify an attendee's details in the attendance list:

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Maintenance.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Edit Form Configuration tab at the top of the page. The Payment Processing page will display by default.
6. Click the Special Features & Functions tab. The Special Features & Functions page will display.
7. Click the View current attendance list link. The current attendance list will display.
8. Click the View attendee details link next to the appropriate attendees name. See figure 81. The Attendee details page will display. See figure 82.
9. Click the Modify attendee details link. The Attendee Details page will display in edit mode. See figure 83.
10. Make the appropriate modifications.
11. Click Save changes, or Cancel to abort. The Event Attendance page will refresh with the modified information displayed.
How to remove an attendee from the attendance list:

1. Log into the **Admin Tool**.
2. Click the **Event Forms** link in the left navigation located under **Community Maintenance**.
3. Scroll down to the **Manage Forms** section.
4. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
5. Click the **Edit Form Configuration** tab at the top of the page. The Payment Processing page will display by default.
6. Click the **Special Features & Functions** tab. The Special Features & Functions page will display.
7. Click the **View current attendance list** link. The current attendance list will display.
8. Click the **View attendee details** link next to the appropriate attendees name. The Attendee details page will display.
9. Click the **Remove from attendance list** link. See figure 84. The Attendance List will display without the removed attendee.

How to add a guest to the attendance list:

10. Log into the **Admin Tool**.
11. Click the **Event Forms** link in the left navigation located under **Community Maintenance**.
12. Scroll down to the **Manage Forms** section.
13. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
14. Click the **Edit Form Configuration** tab at the top of the page. The Payment Processing page will display by default.
15. Click the **Special Features & Functions** tab. The Special Features & Functions page will display.
16. Click the **View current attendance list** link. The current attendance list will display.
17. Click the **View attendee details** link next to the appropriate attendees name. The Attendee details page will display.
18. Click the **Add a guest** link. See figure 85. The Attendance List will display without the removed attendee.
19. Complete the form.
20. Click **Save changes**, or Cancel to abort. The Event Attendance page will refresh with the newly added attendee details displayed.
How to deactivate the attendance list:

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Maintenance.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Edit Form Configuration tab at the top of the page. The Payment Processing page will display by default.
6. Click the Special Features & Functions tab. The Special Features & Functions page will display.
7. Uncheck the Turn on Attendance List view for this event checkbox. See figure 87.
8. Click Finished, or Cancel to abort. The page will refresh and the Update successful confirmation will display at the top of the page.

Administrators may choose to display the attendance list link ONLY when a minimum number of attendees have registered.

How to configure the attendance list to show based on # of registrants:

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Maintenance.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Edit Form Configuration tab at the top of the page. The Payment Processing page will display by default.
6. Click the Special Features & Functions tab. The Special Features & Functions page will display.
7. Check the "Only show the link to the attendance list when there is a minimum of X attendees" checkbox below and enter the number of minimum attendees. See figure 88.
8. Click Finished, or Cancel to abort. The page will refresh and the Update successful confirmation will display at the top of the page.
**Waiting List** allows customers to add themselves to the waiting list for this event. When this feature is enabled, a link will display on the form, which will open a popup window displaying the waiting list.

**How to activate/deactivate the waiting list:**

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Maintenance.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form.
   The Edit Forms page will display.
5. Click the Edit Form Configuration tab at the top of the page. The Payment Processing page will display by default.
6. Click the Special Features & Functions tab. The Special Features & Functions page will display.
7. Check the Turn on Waiting List for this event checkbox. The page will refresh. See figure 89.
8. Select whether the waiting list link should appear at all times, or if the link should only appear when the inventory for at least one event item in this event is reached.
9. Click Finished, or Cancel to abort. The page will refresh and the Update successful confirmation will display at the top of the page.

**To deactivate:**

1. Follow steps 1-6 to the left.
2. Uncheck the Turn on Waiting List for this event checkbox.
3. Click Finished, or Cancel to abort. The page will refresh and the Update successful confirmation will display at the top of the page.

**How to add a potential attendee to the waiting list:**

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Maintenance.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form.
   The Edit Forms page will display.
5. Click the Edit Form Configuration tab at the top of the page. The Payment Processing page will display by default.
6. Click the Special Features & Functions tab. The Special Features & Functions page will display.
7. Click the View current waiting list link. The Waiting List will display. See figure 90.
8. Click the Add a new waiting list entry link. The Modify waiting list entry page will display. See figure 90.
9. Complete the form.
10. Click Update Waiting List Entry, or Cancel to abort. The Waiting List will display with the newly added entry listed.

**Note:** The administrator's name and email address will display by default.

**Switch User** enables an administrator to quickly add a member using the members HPC_ID.
How to remove a potential attendee from the waiting list:

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Maintenance.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Edit Form Configuration tab at the top of the page. The Payment Processing page will display by default.
6. Click the Special Features & Functions tab. The Special Features & Functions page will display.
7. Click the View current waiting list link. The Modify waiting list entry page will display.
8. Click the View entry details link to the appropriate entry’s name. The Waiting List Entry Details page will display.
9. Click the Remove link. See figure 91. The Waiting List page will display with the removed entry not displaying.

How to modify a waiting list entry:

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Maintenance.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Edit Form Configuration tab at the top of the page. The Payment Processing page will display by default.
6. Click the Special Features & Functions tab. The Special Features & Functions page will display. Click the View current waiting list link. The Modify waiting list entry page will display.
7. Click the View entry details link to the appropriate entry’s name. The Waiting List Entry Details page will display.
8. Click the Modify link. See figure 92. The Modify waiting list entry page will display. See figure 93.
9. Complete the form.
10. Click Update Waiting List Entry, or Cancel to abort. The Waiting List will display with the modified information listed.
Guest Information requires the registrant to assign each guest to an event item or sub-event. When this feature is enabled, a "Guest Information" page will be displayed prior to form submission. On this page, each event item or sub-event will be displayed with a list of guests and checkboxes. The registrant must select the appropriate number of attendees for each event item or sub-event. If the registrant attempts to select more attendees than they have registered for, an error message will display.

**How to activate matching guests:**

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Maintenance.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Edit Form Configuration tab at the top of the page. The Payment Processing page will display by default.
6. Click the Special Features & Functions tab. The Special Features & Functions page will display.
7. Check the Turn on Matching Guests for this event checkbox. The page will refresh. See figure 94.
8. Click Finished, or Cancel to abort. The page will refresh and the Update successful confirmation will display at the top of the page.

**IMPORTANT!**
The Event with guests and Multi-page guest event templates automatically come with the Matching Guest feature activated.
Campaigns

The Campaigns feature enables an administrator to assign an Event form to a particular campaign. For example: The **Annual Fund Form (ID #1645)** could be assigned to **Annual Fund 2009 Campaign**. In the future, administrators will be able to pull report on specific campaigns.

**How to add campaigns:**

1. Log into the **Admin Tool**.
2. Click the **Event Forms** link in the left navigation located under **Community Maintenance**.
3. Scroll down to the **Manage Forms** section.
4. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
5. Click the **Edit Form Configuration** tab at the top of the page. The Payment Processing page will display by default.
6. Click the **Campaigns** tab. The Campaigns page will display.
7. Click the **Click here to manage your organization's campaigns** link. The Email Marketing Manager Campaign page will display. **See figure 95.**
8. Enter a **Campaign name**.
9. Click **Add campaign**. The page will refresh and the **Added <new campaign name> to campaign list** confirmation will display at the top of the page.

**How to assign a campaign:**

1. Log into the **Admin Tool**.
2. Click the **Event Forms** link in the left navigation located under **Community Maintenance**.
3. Scroll down to the **Manage Forms** section.
4. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
5. Click the **Edit Form Configuration** tab at the top of the page. The Payment Processing page will display by default.
6. Click the **Campaigns** tab. The Campaigns page will display.
7. Select one or more campaigns from the **Available campaigns** list. **See figure 96.**
8. Click the **Add** button to add the select campaign(s) to the **Selected campaigns** list.
9. Click **Finished**, or Cancel to abort. The page will refresh and the **Campaign mapping successful** confirmation will display at the top of the page.
Branding

Branding allows institutions and associations to create Event Forms with a different design (look & feel).

**Edit Branding**

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Edit Form Configuration tab at the top of the page. The Payment Processing page will display by default.
6. Select Branding tab. The Branding page will display. See figure 97.
7. Select appropriate branding radio button.
8. Click Finish, or Cancel to abort. The page will refresh and the Branding successfully updated confirmation will display at the top of the page.

*Note: Use the Preview link to view the form with the current branding.*
Profile Data Management

Profile Data Management allows the institution/association to determine if the user can update his profile information with the data collected in the Event form.

The available profile data management options:
- Always use updated data on the form submission only, do not update the customer's profile with data changes (default setting)
- Always update the customer's profile with data changes
- Allow customer to choose whether or not to have their profile updated with any data changes that they make

*Note:* It is recommended to allow users to choose whether or not their profile data will be updated with any changes they make on this form.

How to activate profile data management:

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Edit Form Configuration tab at the top of the page. The Payment Processing page will display by default.
6. Select Profile Data Management tab. The Profile Data Management page will display. See figure 98.
7. Select your profile data management option.

If allowing users to choose whether or not their profile data...

8. Enter Label.
9. Select Initial setting (Checked or Unchecked). Unchecked is the default setting.
10. Click Save, or Cancel to abort.

*Notes:*
- By default, the checkbox component will be inserted as the first component on your form.
- The checkbox may be moved and edited like any other component, but it may not be hidden or deleted.
- If you change these Profile Data Management settings at a later date, this checkbox will automatically be removed from this form.
**Status Flag Trigger** allows you to update a status flag in a customer's profile, based on form input or form submission. For example: Once the event form has been successfully submitted, the Reunion Status data field can be updated from "Not registered" to "Registered".

**How to set the status flag trigger:**

1. Log into the [Admin Tool](#).
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Edit Form Configuration tab at the top of the page. The Payment Processing page will display by default.
6. Select Profile Data Management tab. The Profile Data Management page will display.
7. Click the Create a new status flag trigger link at the bottom of the page. The Create and edit status flag triggers page will display. See figure 99.
8. Enter the Trigger name.
9. Select the Profile data field.
10. Select the flag value (Alphanumeric or Date)
11. Select Trigger type (Form Submission or Form Input).
12. If Form input trigger type is select, select the components or component-options. See figure 100.
13. Click Save, or Cancel to abort.
Tell-A-Friend

Tell-A-Friend allows users to refer other friends and family to your Event form. The tell-a-friend link is added to the bottom of the Thank You page (See figure 101), which allows the user to tell a friend about this event. If the user clicks on the link, the tell-a-friend page will open in a new browser window. See figure 102. Contact your Client Relations Manager to activate this feature.

The recipient’s email will contain the message the customer submitted, with a link to the form. See figure 103.

Select Tell-A-Friend Options

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Maintenance.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Edit Form Configuration tab at the top of the page.
6. Select Tell A Friend tab. The Tell-a-Friend page will display. See figure 104.
7. Check the Include the "Tell a friend" link on the Thank you page checkbox.
8. Enter the Link Text and the Subject Text.
9. Click Finished, or Cancel to abort.
Exercise #2: Test & Activate Form

In this exercise you will configure the payment processing by selecting the appropriate credit card types and merchant ID, test and activate the form.

To complete this exercise:
1. Go to your Admin tool, and login OR
   Go to http://admin.alumniconnections.com/olc/admin/LV8/admintool/ and
   login with user ID = uc2008 and password = FIRST INITIAL + LAST NAME + 08
   For example: Your login will look similar to uc2008/nspivey08
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Edit Form Configuration tab at the top of the page.
6. Setup the Payment Processing.
7. Select the Merchant ID for handling payments.
8. Select the appropriate Credit Card Types.
9. Send form information to the TEST credit card processing server only.
10. Activate the form.
11. Test the form.

If you finish early…
- Add a Checkbox component for: Yes, I would like to volunteer at the Wine & Cheese Event.
- Add a Text Input (Multi Line) component with the Maximum characters = 255, height = 100 pixels and width = 400 pixels for: List other Social Events you are interested in attending.
- Add a required Radio Button component for: Are you 21 or older? Yes/No
- Add a Dropdown Menu (Custom) component for: Complimentary HCU Wine & Cheese T-shirt (Small, Medium, Large, Extra Large, 2XL, 3XL)
- Add a Text Input (Single Line) Component for: Online Gift
- Activate the Tell-a-friend feature, and re-test the form.
Event Reporting

How to access Event Reports

1. Log into the Admin Tool.
2. Click the Event Reports under Community Reports. The Reports page will display. See figure 105.

There are two types of reports:
- Detailed
- Summary

![Event Builder - Reports](image)

Figure 105
Detailed Reports
Detailed Reports are used to create customized Event Reports.

Click here to open help popup.

Customize field names.

Enter date range.

Display or download report from a saved query.

Select the fields you would like to include in this report.

Click the top most include all fields checkbox will check all checkboxes within that section.

Every field that appears on the form is listed as a possible field to be reported on.

The fields are listed in the same order as they appear on the custom form, including the section name that they appear under.
To view or download a detailed report:

1. Log into the Admin Tool.
2. Click the Event Forms under Community Reports.
   The Reports page will display.
3. Click the Detailed link next to the appropriate form name. The Detail Report page will display.
4. Select the fields you wish to display in the report.
5. Click the Display Report button. The Detailed Reports result page will display. See figure 106.

9. If you are happy with the displayed report, enter a Query Name.
10. Click the Save Query button. A confirmation page will display. See figure 107.
11. Click the Return to custom report page link.
12. Select the newly saved query from the Saved Queries dropdown menu. See figure 108.
13. Click the Download Report button. A File Download window will popup. See figure 109.
14. Click **Save** to save the report. A Download Complete popup window will display. See figure 110.

**Note:** Clicking Open will open the report as a text file. It is best to open in Microsoft Excel.

**How to open a saved report in MS Excel:**

1. Open Microsoft Excel.
2. Click **File > Open**. The Open dialog box appears.
3. In the Files of type list, select **All Files (*.*)**.
4. Select the report file to import.
5. Click **Open**. The Text Import Wizard dialog box appears. See figure 106.
6. Select **Delimited** if not already selected.
7. Click **Next**. Excel displays step 2 of the Text Import Wizard. See figure 107.
8. Click **Finish**. Excel imports the report.
Detail Reports – Matching Guests

Administrators can match members to their corresponding registration, and have the member’s Client ID/Unique ID display in the reports.

How to activate matching guest feature:
1. Log into the Admin Tool.
2. Click the Event Forms under Community Reports.
   The Reports page will display.
3. Click the Detailed link next to the appropriate form name. The Details Report page will display.
4. Select the fields you wish to display in the report.

**IMPORTANT!**
The Client ID field MUST be selected for the Match link to display within the report.

5. Click the Display Report button. The Detailed Reports result page will display. See figure 109.
6. Click the Match link next to the appropriate registrant’s name. The Admin Search popup will display. See figure 110.
7. Click Search button at the bottom of the page. The User Order page will display with the members who match the search. See figure 111.

If no users are found, the page will refresh, and a “Your search returned no results” message will display.

8. Click the appropriate member’s name to associate the order to his/her profile. The Detailed Reports result page will re-display with the member’s client ID. See figure 112.

Suggestion: Click the User Snap Shot to verify the member’s identity.

9. Repeat steps 6 – 8 as needed.
### Detail Reports - Recurring Payments

An asterisk appears as the total for recurring payment orders. See new message on the bottom of the report, which advises the administrator to refer to the CyberSource Payment Batch Detail Report for their Merchant ID for reconciliation of recurring payments.

**Note:** The screen shot below was captured from the Donation Reports module.

<table>
<thead>
<tr>
<th>Order #</th>
<th>Order Date</th>
<th>Gift Amount</th>
<th>Recurring Payment Flag</th>
<th>Recurring Amount</th>
<th>Recurring Frequency</th>
<th>Recurring Interval of Payments</th>
<th>Recurring Start Date</th>
<th>Currency</th>
<th>Gift Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>153763</td>
<td>Mar 9 2007 8:10AM</td>
<td>100.00</td>
<td>N</td>
<td>25.00</td>
<td>monthly</td>
<td>3</td>
<td>2007/3/28</td>
<td>USD</td>
<td>join</td>
</tr>
<tr>
<td>153764</td>
<td>Mar 9 2007 11:25PM</td>
<td>100.00</td>
<td>N</td>
<td>25.00</td>
<td>monthly</td>
<td>3</td>
<td>2007/3/28</td>
<td>USD</td>
<td>join</td>
</tr>
<tr>
<td>153765</td>
<td>Mar 9 2007 5:20AM</td>
<td>100.00</td>
<td>N</td>
<td>25.00</td>
<td>monthly</td>
<td>3</td>
<td>2007/3/28</td>
<td>USD</td>
<td>join</td>
</tr>
<tr>
<td>153766</td>
<td>Mar 9 2007 1:07PM</td>
<td>100.00</td>
<td>N</td>
<td>25.00</td>
<td>monthly</td>
<td>3</td>
<td>2007/3/28</td>
<td>USD</td>
<td>join</td>
</tr>
</tbody>
</table>

*Recurring payments: The is a recurring payment order. The amount of each payment is listed under Recurring Amount. Please refer to your CyberSource Payment Batch Detail Report for reconciliation of recurring payments.*
Detailed Reports – Customize field Names for Reports

Administrators can customize the field names used in the column heading of their reports for the form.

10. Log into the Admin Tool.
11. Click the Event Forms under Community Reports.
   The Reports page will display.
12. Click the Detailed link next to the appropriate form name. The Details Report page will display.
13. Click the Customize field names for reports link. See figure 113. The Customize Field Names For Reports page will display. See figure 114 above.
14. Enter the new field name in the associated input box.
15. Click Update Field Names, or Cancel to abort. The page Detail Report page will display with the Field names have been updated confirmation at the top.

The new custom field names will display as the field names on the Detail Reports page, and in the created report. See the figure below.
Summary Reports

Summary Reports enables the administrator to quickly capture the Total Number of registrations submitted and the Total Dollar Amount of received for the event form.

**Event Builder - Reports**

<table>
<thead>
<tr>
<th>Form ID:</th>
<th>1398</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form Name:</td>
<td>Wine &amp; Cheese Event</td>
</tr>
<tr>
<td>Form Description:</td>
<td>Wiine &amp; Cheese Event - Basic event, no guests</td>
</tr>
</tbody>
</table>

Select the date range for your Summary Report, then click the Create Report button.

**Start of Date Range** | **End of Date Range**
--- | ---
July | July
30 | 30
2007 | 2008

**Summary Report for Wine & Cheese Event**

<table>
<thead>
<tr>
<th>Date range:</th>
<th>7/30/2007 to 7/30/2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Events (Count):</td>
<td>9</td>
</tr>
<tr>
<td>Total Events (Amount):</td>
<td>$150.00</td>
</tr>
</tbody>
</table>

Return to Form List

---

**How to create a summary report:**

1. Log into the Admin Tool.
2. Click the **Event Forms** under Community Reports. The **Summary Reports** page will display.
3. Click the **Summary** link next to the appropriate form name. The Summary Report page will display.
   *See figure 115 above.*
4. Modify the **Date Range**.
5. Click the **Create Report** button. The page will refresh, and the new report will display.

**Note:** The default report displays the Total Number of Events from one year ago to the current date.
Event Registration/Order History
Registered members can access their Event Registration/Order History via Member Services in the Online Community. Clicking the Event Title link will open the event.

<table>
<thead>
<tr>
<th>Start Date</th>
<th>Title</th>
<th>Dollars</th>
<th>Order Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sept 29, 2008</td>
<td>Alumni Dinner</td>
<td>25.00</td>
<td>Jul 28, 08</td>
</tr>
<tr>
<td>Oct 14, 2008</td>
<td>Homecoming 2008</td>
<td>20.00</td>
<td>Jun 03, 08</td>
</tr>
</tbody>
</table>

Event Order History
Administrators can view a member’s event order history via the Admin Tool.

How to access the Event Order History report:
1. Log into the Admin Tool.
2. Click the Online Directory link in the left navigation.
3. Search for the member’s record.
4. Click the member’s name.
5. Click the User Details button.
6. Check the Event Order History report. See figure 116.

Note: Administrators can pull multiple reports simultaneously. Check the appropriate checkboxes for each of the reports.

7. Click the Display Report button. The report will display at the bottom of the page. See figure 117.

IMPORTANT!
The report is downloadable. Click the Download Report link.
Appendix A: Widgets

A widget is a mini-web application you can add to your event such as:

**Countdown Clock**
Countdown to the event.

**Driving Directions**
Registrants can easily capture driving directions. The destination address is pre-filled.

**YouTube Video**
Engage potential attendees by adding YouTube video on last year’s event.

Widgets are available in ready-to-use formats and are visually attractive and customizable by the user. It is made up of a snippet of HTML code which is available from the website which hosts the widget. You can "copy" that code and "embed" it in your event form.

The snippet of code which makes a Widget can be a JavaScript code, Adobe Flash plug-in, code for embedding Windows Media player or even SilverLight plug-in, and is hosted in the website which provides the Widget.
How to capture widget code:

1. Go to Google Gadgets for your webpage: http://www.google.com/ig/directory?synd=open
   The Google Gadget page will display. See figure 1.
2. Search for the appropriate gadget (widget).
3. Click the Add to your webpage button. The Add this gadget to your webpage page will display. See figure 2.
4. Enter the gadget settings, if applicable.
5. Click the Get the Code button.

The page will refresh with the code displayed. See figure 3.

6. Select all the HTML code and copy.
How to add a widget:

1. Log into the Admin Tool.
2. Click the Event Forms link in the left navigation located under Community Services.
3. Scroll down to the Manage Forms section.
4. Click the Edit link next to the appropriate form. The Edit Forms page will display.
5. Click the Visual edit mode button. The form will display in Visual Edit Mode.
6. Click the Widget button under Add a component at the top of the page. See figure 4. The page will refresh with the add Widget section available.
7. Enter an Identifier. Be sure to use only letters, numbers, dashes (-), or underscores (_).
8. Select the Placement (first or last).
9. Paste the widget HTML code in the space provided. See figure 5.
10. Click Save changes, or Cancel to abort. The widget will appear within the event. See figure 6.

Note: To move the widget component, click on the label, then drag and drop to desired location. If this does not work, go to Edit Form, go to the appropriate section, and re-order the items.
How to capture YouTube video code:

1. Go to YouTube: http://www.youtube.com
2. Search for the appropriate video. The search results will display. See figure 7.
3. Click the video title or the thumbnail photo. The video will begin to play, and the embed code will display to the right of the video. See figure 8.
4. Select all the HTML code and copy.