<u>**Creating an Event: Products, Payments, and Custom Forms**</u>

A quick review:

- Events and groups are <u>**NOT**</u> the same.
- Groups can be <u>**attached**</u> to events.
- The Shades Website and the Portal are <u>**NOT**</u> the same.
- For a group to be available for check in, it must be listed under the <u>**rooms & groups**</u> subtab in the event.
- A Hidden URL and an External Registration URL are <u>**NOT**</u> the same.

Products

What is a product?

- A Product is what controls the payment total for an Event registration.
- Products are commonly used to allow users to register for paid events (like a seminar or conference) or collect additional required (and sometimes paid) information.
- Products can be free (so, collect $0).
- A Product is one of the required items in order for Event registration to be live.
- Option Groups can optionally be associated with Products to provide additional options during registration. For example:
    - Free potluck (Product) with optional free childcare (Option Group).
    - Free Bible study (Product) with required paid book materials (Option Group).
    - Paid event (Product) with optional extras (Option Group).
    - Paid event (Product) with no optional extras.

Creating a Product

1. Go to Products & Payments > Products.
2. Click New in the top left corner and complete the fields:
    - <u>Product Name</u>
    - <u>Description:</u> indicating a description is helpful to make sure users don't create the same product concept twice.
    - <u>Base Price:</u> indicate the price that all registrants pay (can be $0).
    - <u>Deposit Price:</u> if desired, indicate a deposit price. In this case, the Portal displays a price drop-down (Base Price is the default, and Deposit Price is an option). If registrant pays deposit, the balance can be paid later on the My Purchase History page of the Portal.
    - <u>Active:</u> if Yes, the Product is available for Event registration.
    - <u>Price Currency:</u> the only option is US Dollars
3. Click Save.

What is an Option Group?

- Option Groups allow you to extend a Product's functionality.
- After you create an Option Group record, you create individual options (Option Price) records that are placed together within the Option Group.
- A single product can have multiple Option Groups. For example, your Women's Retreat may have an Option Group that defines how many roommates the registrant shares a hotel with (the choice impacts the price they pay). Another Option Group may allow them to decide if they wish to pay for an optional sightseeing trip taking place during the retreat.

Creating an Option Group

The Option Groups page is located under Products & Payments. You can create a new record from that page or from the Option Groups sub-page of an open Product record. In either case, you populate the same fields:

- **Option Group Name**
- **Product**
- **Description**
- **Mutually Exclusive:** if Yes, the user can only pick one of the Options assigned to this Option Group.
- **Required:** Forces the user to choose at least one option in the Group.
- **Note Label:** This field allows the user to provide a quick note for each option.
- **Online Sort Order:** if there is more than one Option Group, this field controls the order the Option Groups sort in relation to each other.

Once the Option Group is created, you can create your option prices.

Creating Option Prices

Once your Option Group is created, open the record from the Option Groups page (if you open it on the Products sub-page you won't be able to add or edit options within the group - use the jump button if you made a new Option Group on the Products page). You should see an Option Prices sub-page where you can add individual options for this group.

- **Option Price:** the fee for this option, which is added to the total registration cost. If you set the price to $0, the price is replaced with the "free product option name"
- **Option Title:** the name of the option.
- **Active:** if Yes, the option is available for use in Event registration.
- **Qty Allowed:** indicate the maximum number of this option that registrants are allowed to choose. If set to 1, a checkbox or radio button is available to the user rather than a drop-down list of numbers. Note that the system doesn't currently account for Participation Status (e.g., 05-Cancelled); as such, if someone chooses this option and then cancels their registration, the system still counts their use of this Option Price. Also, this field is not evaluated when the Product Option Price is a promo code, which are limited to one use per transaction.

- **Add to Group:** if a Group is indicated here, the registrant is automatically added to the Group:
  - If the Participant is already a current Group participant, they won't be added.
  - If the Participant already exists in the Group but has a future End Date, they won't be added.
  - If the Participant does not already exist in the Group, a Group Participant record is created with a start date of the date registered and no end date. They will be added with the Default Group Role assigned to the Group's Group Type.
  - If the Participant exists but with a past End Date, a new Group Participant record is created with a start date of the date registered and no end date.
- **Sort Order:** if there is more than one Option Price, this field controls the order the Option Prices sort in relation to each other.
- **Max Qty: I**ndicates the maximum times this option is allowed across all registrations. Leave blank if unlimited spots are available. For example, if you indicate 10, this option can only be selected 10 times. Note: This will count the total number of times the Product Option Price is chosen, so if you have this set to 100 and the Qty Allowed field is set to 10, if all 10 of the first people to register choose ten Option Prices, the Option Price will no longer be available. Also note: whether or not the individual has an invoice or participant status of canceled the Product Option Prices they have chosen will still count towards your total.
- **Days out to Hide:** indicate the number of days out from the Event Start Date that you want this option to be hidden. For example, if you indicate 14, the option is no longer available starting two weeks before the Event Start Date. This works well with Promo Code for "early bird" discounts. The time is not considered when calculating the date to hide.
- **Promo Code:** indicate the code/phrase that would be entered to get the discount set in the option price field. For example, "staff50".
- **Min Qty:** indicate the minimum quantity allowed for this item at a certain price. For example, you have to buy at least 5 tickets to get the Option Price of $20/ticket, users would have a drop-down with options for 5, 6, etc.. You will want to ensure that the Qty Allowed is higher than this number.

Promo Codes

The Promo Code is set on the Option Price record. If you set up a Promo Code, keep the following in mind:

- Promo Codes can only be for a flat dollar amount (no percentages) and should be entered as a negative number.
- Promo Codes work with both Base Price only and Option Price only Products.
- Promo Codes should not include special characters.
- **Always** set up Promo Codes in their **own** separate Option Group. Don't mix them with other Option Prices that don't have Promo Codes.
- You can have multiple Promo Codes (Option Prices) on the same Option Group (e.g., one for students, and another for volunteers).
- On the related Option Group record, set Required=False.

- If the related Option Group is set to Mutually Exclusive=True, only one Promo Code can be applied.
- You can set a Max Qty on the Option Price that limits how many times a Promo Code can be redeemed by all registrants. (The Qty Allowed field does not pertain, a Promo Code can only be added once by a single registrant.)
- You can also turn off the Promo Code by setting the Option Price record to Active=False.
- Similar to many other event registration systems, the Promo Code box always shows on the Event registration.
- Promo Codes always show at the bottom of the registration page (and if you have a Custom Form, below that as well).
- The Promo Code box labeled "Promo Code" is all the detail that shows on the Portal. The Option Price record's Option Title only shows as part of the "confirmation" after a promo code is successfully applied.

Example Promo Code Setup

Create a Product and then create the Option Group and Option Price as follows:

Option Group

- **Option Group Name:** Promo Codes
- **Product:**
- **Description:**
- **Mutually Exclusive:** if Yes, only one Promo Code can be applied
- **Required:** No

Option Price

- **Option Price:** -15.00
- **Option Title:** $15 off
- **Active:** if Yes, the Promo Code is available for use
- **Max Qty:** indicate a number if you want the Promo Code used a limited number of times
- **Promo Code:** volunteer15
- **Days Out To Hide:** indicate a number if you want this Promo Code to stop being available during a certain time frame before the Event Start Date

Early Bird Discounts

The **Days Out To Hide** field on the Option Price can be leveraged for early bird discounts. Once the Days Out To Hide number is reached, the discount automatically disappears from the Event registration.

To create an Early Bird Discount Product:

1. Locate or create a Product setting the base price of your event to an amount greater than the early bird discount. If you will allow payment of a deposit only, make sure the deposit is greater than your early bird discount.
2. Create a Product Option Group titled Early Bird Discount and associate it with your Product.
3. Make this Product Option Group mutually exclusive and required.
4. Add one Product Option Price to this group called Early Bird Discount.

5. On the Option Price record, enter the number of Days Out to Hide, if desired. For example, if your event is on the 25th, and you want the discount to be hidden starting on the 10th, then the Days Out to Hide would be 15.
6. Set the quantity allowed to 1 and make sure the Product Option Price record is Active=Yes.
7. Make sure the Product Option Price is a negative number.

Understand how the system applies the discount:
For all negative products selected during the registration process, the system will add a payment detail line to the Payment. This will ensure that the Product Details will match the Product price for the Product(s) selected.
Example:
Typically, the early bird discount is used as dollars off of the full price. So, the Event is set up with a price of $50 (the entire registration period) and then you have an early bird discount Product Option that is -$10. But, this Product Option is only available until 2 weeks prior to the Event. In this case, there is nothing for anyone to change once setup.
So, if you register 3 weeks out, you see that it is $50 and you choose the option for the early bird discount of -$10 and now your cart is $40. But, if you register 1 week out, the -$10 Product Option is hidden, so, you pay the full $50.

Working with Custom Forms

Basics

- A Custom Form is a way
- A Custom Form can be standalone or can be attached to other MinistryPlatform functions.
    - **Standalone Form:** A Custom Form that is not associated with any other MinistryPlatform functionality. A standalone form could be used for surveys or static forms you want to publish on your website.
    - **Event Registration Forms:** A Custom Form that is associated with an Event in the Event's Registration Form field. The form questions appear after the default attendee information fields that are always present in an Event registration. This is an option if you need to collect additional information as a part of your registration (e.g., t-shirt size).
    - **Opportunity Forms:** A Custom Form that is associated with an Opportunity in the Opportunity's Custom Form field. The form questions appear after the default fields that are always present in Opportunity Finder's response form.
    - **Mission Trip Registration Forms:** A Custom Form that is associated with a Mission Trip Pledge Campaign. The form questions appear after the default fields that are always present in a Mission Trip Registration form. We do not currently use this feature.
- Contact and Household information that people enter via a Custom Form does **not** automatically update their Contact or Household records. This is by design. When a person fills out a Custom Form, it's never known exactly what is being asked, so it cannot be confidently assumed that the person entering the contact information is entering it for themselves or someone else.

Creating a Form

1. Go to Custom Forms > Forms.
2. Click New.
3. Enter instructions for your Form:
4. You can optionally collect contact and/or address information when this Form is accessed as a **standalone form**:
    - "Get Contact Info" and "Get Address Info" are ignored when the Form is accessed as a part of an event registration, opportunity to serve, or mission trip registration since that information is collected in the context of those Portal pages.
5. The Complete Message will appear when the form is submitted. This will only display if used as a **standalone form**.
6. The Primary Contact field is used by the default Form Response Process to identify the Contact to notify and is available for custom Views and Processes.
7. The Notify field if set to True, is used by the default Form Response Process and is available for custom Views and Processes.
8. If needed, set a Congregation for your Form (optional) to ensure Users are limited to Locations allowed by with Global Filter permissions.

9. Click Save.
10. Add fields to the Form.

Adding Fields to Custom Form

Once you create your form, you need to add Fields.

To add Fields:

1. Go to Custom Forms > Forms
2. Open your Form.
3. On the Fields sub-page, click New:
4. Enter the values for your Form Field (see Form Fields below)
5. Click Save.
6. Repeat Steps 3-5 for all the fields you want included in the Custom Form.

Removing Fields

If you need to remove a field from your Form **before** any Form Answers have been collected, you can:

1. Open the Form.
2. On the Fields sub-page, check the desired Field(s) to remove.
3. Change the selection to Current/Unsaved Selection.
4. Click the Delete button.
5. Click Delete in the dialog.

If you do not see the Delete button, contact a SPoC for assistance.

*Note: Do **not** delete fields from Forms where Answers have already been collected. You can make the question inactive by changing it to an Instruction field type. However, before you run any report or tool (such as the Form Responses Tool) you need to change it back to its original state.*

Form Fields

The following fields are editable for Custom Form Fields.

- **Field Order:** Indicate a number; this number determines the question order in relation to other fields. It's recommended that your order your fields by 5s or 10s (e.g., 5, 10, 15, 20) so that you can easily add questions in between existing fields without having to reorder everything.
- **Field Label:** Indicate a label/question; this field has limited characters, so you can use the Alternate Label if you have a long question or statement. Whenever you have something in the Alternate Label, the contents of the Field Label do not show on the Portal.
- **Field Type:** Indicate the type of information to collect:
  - Checkbox: provides a single checkbox. *Note: This is a single checkbox (option to check or not check) per field. To create a list of checkboxes, see Q1 in the Custom Forms FAQ on the Knowledge Base.*
  - Date: Provides a calendar pick box.
  - Drop-Down Box: provides a drop-down box where the respondent can choose from pre-defined options (respondents can pick one choice).

    - Instructions: A text field for information or instructions. This field type does not collect data.
    - Memo/Large Text Box: a large text box to allow for lengthy responses (tested beyond 30,000 characters).
    - Radio Buttons Horizontal: provides radio buttons where the respondent can choose from pre-defined options (respondents can pick one choice).
    - Radio Buttons Vertical: Provides radio buttons where the respondent can choose from pre-defined options (respondents can pick one choice).
    - Text Box: Provides space for a short response (tested beyond 250 characters).
- **Field Values:** If your field type allows for pre-defined options (e.g., radio buttons & drop downs), indicate the response options here. Separate the various options by a return.
- **Required:** If Yes, the form does not advance without this field being completed.
- **Placement Required:** If Yes, respondents need to be placed in a Group or Event.
- **Alternate Label:** Indicate a label/question. Ideal for lengthy questions or statements that the Field Label can't accommodate. Allows for formattings such as bold, italics and links.

Managing Form Responses

When someone completes a Custom Form, you can find their response in a couple different places:

- Custom Forms > All Form Responses > search for the desired Form title, or
- Custom Forms > Forms > open desired Form > Responses sub-page.

Viewing Responses

There are several options for viewing individual responses to a Custom Form:

- The Form Responses Tool exports the form submissions into Excel.
- The Selected Form Responses report organizes each response into a document.
- To see a single submission, click any response and read the individual's submission.

Responses Assigned to Default Contact

MinistryPlatform attempts to match the form response to an existing Contact record. If it can't, the response is assigned to Default Contact.

To update forms assigned to Default Contact:

1. Open the form response.
2. Click Edit.
3. In the Contact field, search for and select the appropriate Contact record (if the person doesn't yet exist in MinistryPlatform, add them via the Add/Edit Family Tool).
4. Click Save, then Close.

Disabling Further Responses

You can turn off access to a standalone form and stop further responses from coming in. To do so, go to Custom Forms > Forms and open the desired Form. Then simply add an End Date. If someone tries to access the form after the End Date, a message reads "This form has expired or is no longer available."