Registrations

Basics

- Individuals can register online for your big event provided **all the conditions for registration are met**.
- Use Product Option Groups & Prices
- Registrants can be automatically placed into Groups upon registration by using the Add to Group functionality in **Option Prices**:
  - If you need to manually add a registration (and so they don't go through the automatic registration process), you need to first add the individual to the appropriate Group. Then you need to add them to the Event and, when doing so, search for and find the appropriate Group Participant record and Group record. Because each individual has a unique Group Participant record, you must use the New option to add someone (rather than Add).
- There are two ways to register someone and ensure all Product Options and Custom Form questions are answered:
  1. Individuals can go through the Event registration process on the Portal to register themselves.
  2. Staff can manually add cash and check registrations via the **Add a Payment tool**.
- All registered individuals are visible from an open Event record in the Participants sub-tab.
- The Assign Participant tool can be used to reassign registrants from Default Contact to a real record. You can quickly find registrants that need to be reassigned from:
  - The Event Participants page > Reassign Participant view
  - or, the Event page > Fix: Reassign Participant view.

Communications

- Registrants can be selected from the Event Participants page and communicated with via the **New Message Tool** or the **Text Messaging Tool**
- Automate communication with Event Participants using the Event Reminder Notification and/or the Registrant Message Notification.
- Registrants with an outstanding balance can be emailed the My Purchase History snippet to pay their remaining fees. *Email Tori if you are interested in this!
- Event Coordinators can set up a View Notification on the Event Full Notification view to be notified via email when an Event has reached the Participants Expected.

Reporting

- Need to see something about a person that is in the database but was not collected on your Custom Form, such as the campus they attend? Create a view on either the Event Participants page or the Participants sub-page.
- You can use the **Form Responses Tool** from the Events page to get a spreadsheet of all of the registrants, their answers and what Product and Product Options they chose.
- Take advantage of all the options on the **Selected Form Responses report** that can be run from the Events page and show you all the information someone provided when they signed up, including their invoice details and their Custom Form answers.

Cancelling an Event Participant

The best practice for removing Event Participant records is to change their status to Cancelled and issue a refund, if necessary. However, in the rare scenario that you need to delete an Event Participant record, please note that only dependent records will be deleted. Other records that may have been created through an event registration may need to be deleted separately, like Form Responses.

If your event is canceled, follow the "cancelling an event" steps.

Cancelling an Event

To cancel an Event:

1. On Events, search for and open the desired Event.
2. Click Edit.
3. Change the Cancelled field to Yes.
4. If the Event has active registration, also change the Registration Active field to No.
5. Update the Description and/or Meeting Instructions, as desired.
6. Click Save.

Once the above is complete, a trigger will cause the following automatically:

1. "***Cancelled***" will be appended to the Event Title.
2. The Event's Room Reservations will be marked as Cancelled = True and text of **CANCELLED** is added to the Notes.
3. The Event's Equipment Reservations will be marked as Cancelled = True and text of **CANCELLED** is added to the Notes.
4. The Event's Services Reservations will be marked as Cancelled = True and text of **CANCELLED** is added to the Notes.
5. If Check-in is being used for the event, "****Cancelled****" will also appear at the beginning of the event at a check-in station. To remove the event completely from check-in, set Allow Check-in to No on the event record

Following Up with Event Attendees

Communication

To capture Event Participants for communication, you can either:

- Open desired Event > select desired participants on the Participants sub-page > click Xfer > choose Participants page > use any tool or report to facilitate communication; OR
- Go to People Lists > Event Participants page > search for and select desired Participants > use any tool or report to facilitate communication.

Attendance

To manually update attendance, you can go to People Lists > Event Participants page > search for and select desired Participants > use the Assign functionality. If you have groups associated with your event, always use the **"Group Attendance Tool"** to post attendance after the event.

Group Attendance Tool

- The Group Attendance Tool allows you to quickly post Group-specific Event attendance.
- The tool must be launched from an open Event record, and cannot be launched from a selection.
- When launched, the tool allows you to mark attendance for all Groups associated with an Event. Additionally, if the "Ignore Program Groups" field is set to No (False) on the Event, you can also mark attendance for all Program Groups belonging to the Event's Program.
- This tool is not necessary if you want to record attendance without regard for whether people attended the event as part of a group. Instead, you can either mark attendance by clicking Add on the Participants sub-page of the Event, or you can mark headcount numbers by using Event Metrics to mark headcount numbers.
- SPoCs (Tori or Rob) can grant user access to this tool.