

Event Registration: Create & Manage Events



ER-CMEEvents-5-1-10-11

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Introduction

Event Registration is an online registration system that enables an administrator 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.

Included in this manual are instructions to do the following:

- Create new events using event templates
- Manage event pages, sections, and components
- Edit Event Configurations

Important Note:

The use of the delete function for any section or component should be used with extreme caution. Some but not all deletions can be re-instated by the Harris technology team for a fee. Instead, consider using the options within Visibility Settings to control visibility and availability of a section or component.

Edit Event Pages

Create New Event

How to create a new event:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear. See *Figure 1*.
4. Enter the **event name** and **short description**.

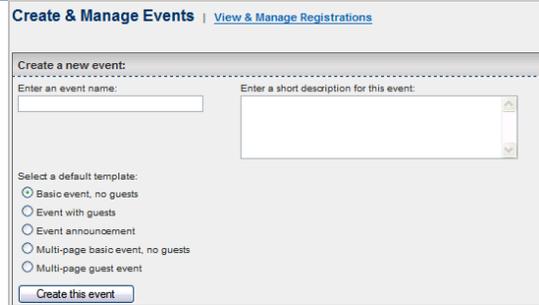


Figure 1

IMPORTANT!
 The Event Form Name **must** be unique. An error message will display if the name is duplicated.
 The Event Form Name and Description are for the administrator's use only. They will not display on the front-end of the form. They both will display Event Reports.

5. Select a required **default template** – see grid below for template definitions.
6. Click the **Create this event** button. See *Figure 1*.

The newly created form will appear at the top of the list of forms, and a **Form successfully created, now appears in form list below** message will appear at the top of the page.

Default Event Templates

Administrators can quickly create a new event using pre-defined event templates.

Template Name	Description	Sample Events
Basic event, no guests	1-page event that includes: event details, attendance list, wait list, personal info, billing & home address, payment info, & confirmation	Wine Cheese, game viewing party, or Happy Hour
Event with guests	2-page event which includes event details, attendance list, wait list, personal info, billing & home address, event guests, and payment info all on page 1; with matching guests & confirmation on page 2.	Alumni BBQ, Golf Tournament, or Reception
Event announcement	1-page event which includes event details. No submit button included.	Announce Chapter, Class, Club, or Affinity Event
Multi-page basic event, no guests	2-page event which includes event details, attendance list, and wait list on page 1; with personal info, billing & home address, payment info, & confirmation on page 2.	Conference, Seminar, or Career Networking event
Multi-page guest event	3-page event which includes event details, attendance list, and wait list on page 1; with personal info, billing & home address, event guests, payment info on page 2; and Matching guests & confirmation on page 3.	Alumni weekend, Reunion, or Homecoming

IMPORTANT!
The appropriate event template must be selected when creating the event. Template types **cannot** be updated later.

Manage Events

How to manage events:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section. See *Figure 2*.

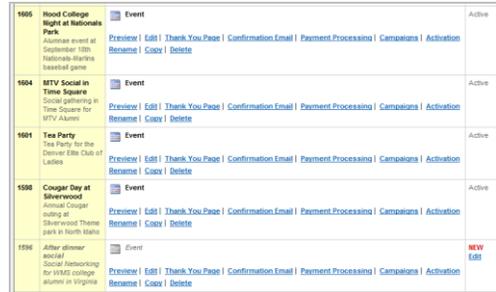


Figure 2

Graphical Icons	
Event	Indicates the event is active and displaying on the public event calendar.
<i>Event</i>	Indicates the event is inactive, and if activated it will display on the public event calendar.
Non-calendar event	Indicates the event is active and not displaying on the public event calendar.
<i>Non-calendar event</i>	Indicates the event is inactive, and if activated it will not display on the public event calendar.

Preview Event

Preview allows administrators to view how the event will display to end users. The submit button is disabled in Preview Event view. The event must be activated in order to fully test the events functionality.

Suggestion: If you do not wish your event to be visible on the public Event Calendar during testing, flag the event as a non-calendar event. See *Edit Event Configuration > Special Features and Functions > Non-calendar event* from more details.

How to preview an event:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Preview** link next to the

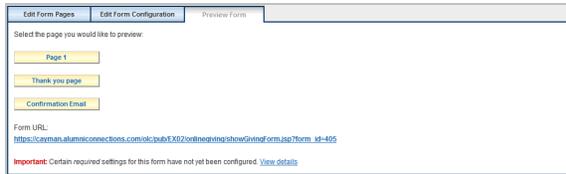


Figure 3

appropriate event. The **Preview Event** page will **display**. See *Figure 3*.

- Click the appropriate page button to preview.

Required Settings

The **Important** message at the bottom of the page alerts administrators of specific required settings that need to be configured prior to marketing the event. Click the **View details** link to view the required settings. See *Figure 4*.

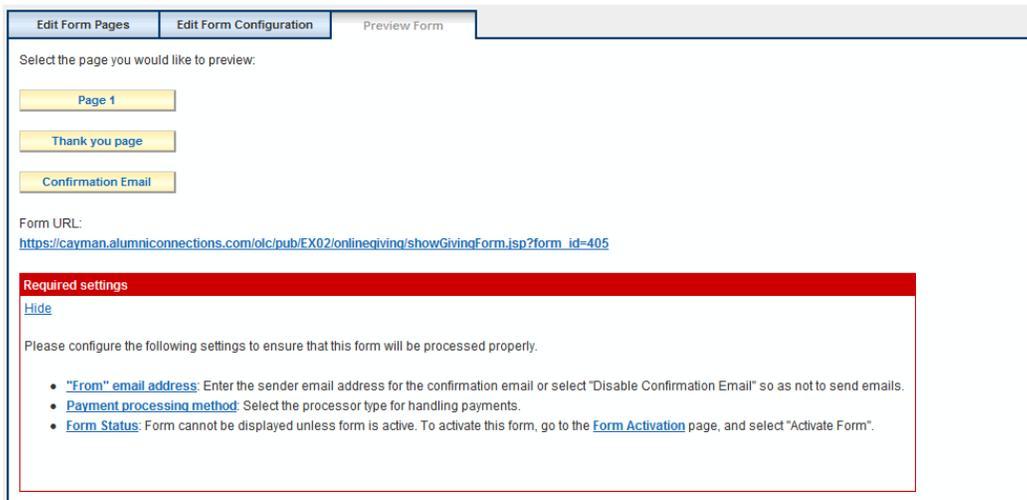


Figure 4

Note: The Required Settings links in each bulleted item navigates directly to the appropriate Event Registration page to set that missing configuration.

Preview This Page

Preview This Page allows administrators to quickly view the current event page as it would appear to end users or to the administrator.

How to preview this page

- Log into the **Administration Center**.
- Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
- Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
- Scroll down to the **Manage Events** section.
- Click the Edit link next to the appropriate event.
- Go to the appropriate page you wish to preview.
- Click the **Preview page (Customer view)** button at the top of the page to view page as customer will see it. Any Admin-only

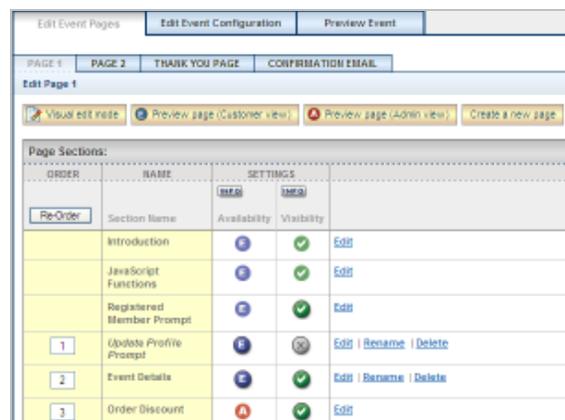


Figure 5

fields will not display. See Figure 5.

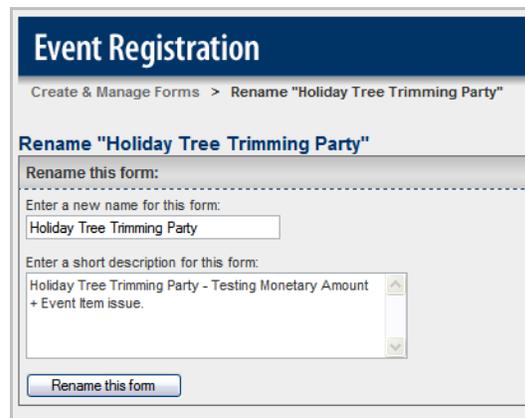
8. Click the **Preview page (Admin view)** button at the top of the page to view page as admin will see it, including all Admin-only fields. See Figure 5.

Rename Event

Rename allows administrators to update the event name and/or description. As with creating a new form, the event name must be unique.

How to rename an event:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Rename** link next to the appropriate form. The **Rename this form** page will display. See Figure 6.
6. When finished making the appropriate edits, click the **Rename this form** button. The Create & Manage Events page will display with the updated form name and/or description.



The screenshot shows a web interface titled "Event Registration" with a sub-header "Create & Manage Forms > Rename 'Holiday Tree Trimming Party'". The main content area is titled "Rename 'Holiday Tree Trimming Party'" and contains the following elements:

- A section labeled "Rename this form:" with a dashed line separator.
- A label "Enter a new name for this form:" followed by a text input field containing "Holiday Tree Trimming Party".
- A label "Enter a short description for this form:" followed by a text area containing "Holiday Tree Trimming Party - Testing Monetary Amount + Event Item issue." with up and down arrow icons on the right.
- A "Rename this form" button at the bottom.

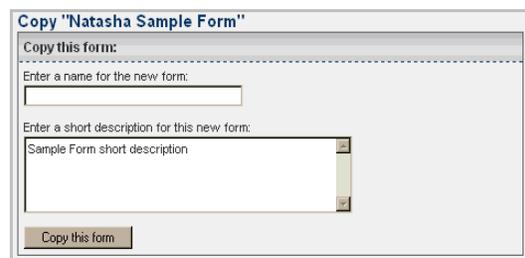
Figure 6

Copy Event

Administrators can duplicate popular events using the copy feature.

How to copy an event:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Copy** link next to the appropriate form. **The Copy this form page will display.** See Figure 7.
6. Enter the event name, and update the description, if necessary.
7. Click the **Copy this form** button.
The duplicate event will display in the Create & Manage Events section at the top of the list. **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



The screenshot shows a web interface titled "Copy 'Natasha Sample Form'". The main content area is titled "Copy this form:" and contains the following elements:

- A section labeled "Copy this form:" with a dashed line separator.
- A label "Enter a name for the new form:" followed by a text input field.
- A label "Enter a short description for this new form:" followed by a text area containing "Sample Form short description" with up and down arrow icons on the right.
- A "Copy this form" button at the bottom.

Figure 7

of the page.

Delete Event

Delete will remove the event from displaying under Manage Events on the Create and Manage Events page.

How to delete an event:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Delete** link next to the appropriate form. The **Delete this form** page will display. See *Figure 8*.
6. Click the Delete this form button, or click Cancel to abort. The Create & Manage Events page will display without the deleted form. A *“Requested form deleted”* message will display at the top of the page.



Figure 8

Edit Event

Edit allows administrators to edit all aspects of an event such as number of pages, section names, components, and much more.

How to edit an event:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Event Pages** will display. See *Figure 9*.

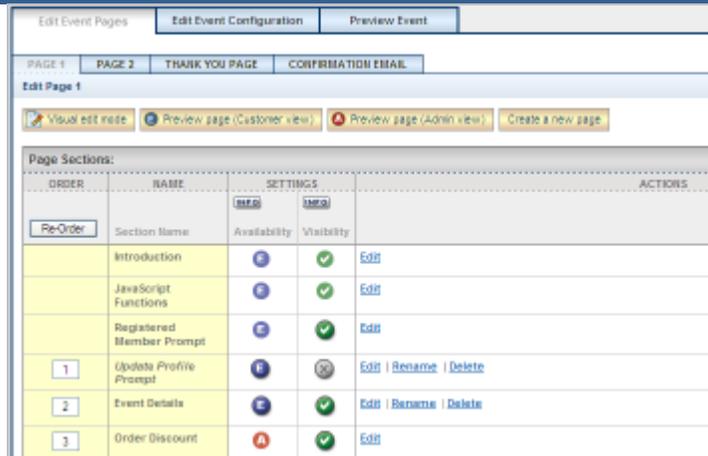


Figure 9

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 event content using Visual Edit:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Event Pages** page will display.
6. Click the **Visual edit mode** button. See *Figure 10*. The form will display in a new window in Visual Edit Mode. See *Figure 11*.
7. Double-click on the text you wish to modify. The edit text input box will appear directly beneath the selected text.

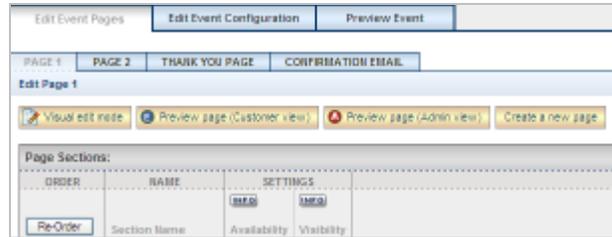


Figure 10

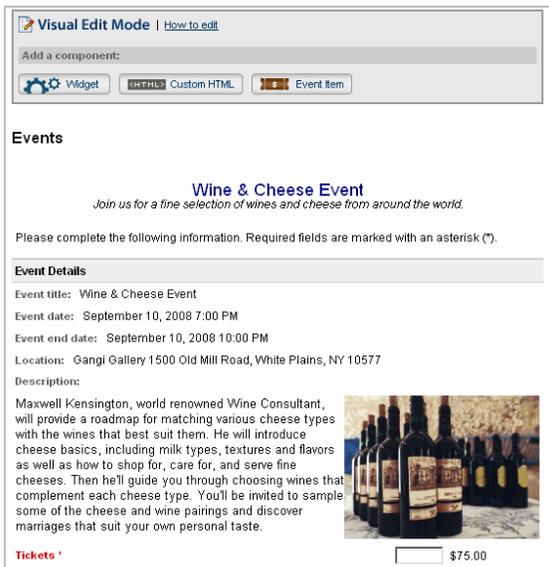


Figure 11

8. Enter the appropriate modifications.
9. 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*.

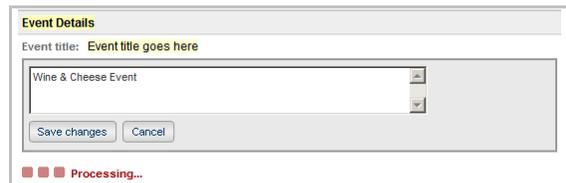


Figure 12

WYSIWYG Editor

Visual edit mode allows administrators to modify Display Custom HTML components using a What You See Is What You Get (WYSIWYG) HTML editor.

How to modify HTML content using WYSIWYG Editor in Visual Edit:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Event Pages** page will display.
6. Click the **Visual edit mode** button. The form will display in Visual Edit Mode.
7. Double-click on the text you wish to modify. The edit text field will appear directly beneath the selected text.
8. Enter the appropriate modifications.
9. 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 13*.



Figure 13

Note: Some HTML tags are supported for text Display Fields; however, the page will need be Refreshed to see the HTML changes. See *Figure 14*. Bold tags were added around "Submit my gift".



Figure 14

Manage Sections

Re-order Section

Re-order allows administrators to rearrange the order in which the sections display on the event page.

How to re-order sections:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Event Pages** will display. To change the section display order, modify the number in the Re-Order column to the left of the appropriate form sections.
6. Click the Re-Order button. The Edit Page will refresh with the sections in the new order.

Add Section

Administrators may add additional sections to any event.

How to add a section:

1. Log into the **Admin Tool**.
2. Click the **Event Registration** link in the left navigation located under Community Services.
3. Scroll down to the **Manage Events** section.
4. Click the **Edit** link next to the appropriate form. The **Edit Event Pages** will display.
5. Scroll down to the **Add a new section to this page**. See *Figure 15*.
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 16*.

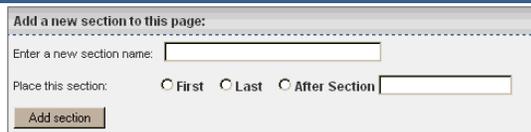
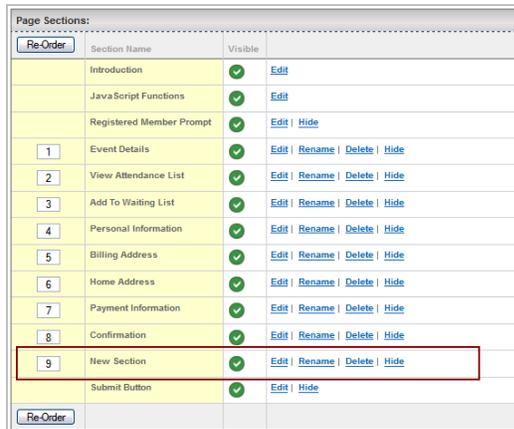


Figure 15



Re-Order	Section Name	Visible	
	Introduction	✓	Edit
	JavaScript Functions	✓	Edit
	Registered Member Prompt	✓	Edit Hide
1	Event Details	✓	Edit Rename Delete Hide
2	View Attendance List	✓	Edit Rename Delete Hide
3	Add To Waiting List	✓	Edit Rename Delete Hide
4	Personal Information	✓	Edit Rename Delete Hide
5	Billing Address	✓	Edit Rename Delete Hide
6	Home Address	✓	Edit Rename Delete Hide
7	Payment Information	✓	Edit Rename Delete Hide
8	Confirmation	✓	Edit Rename Delete Hide
9	New Section	✓	Edit Rename Delete Hide
	Submit Button	✓	Edit Hide

Figure 16

Add Section Header Name

Section headers are used to indicate to end users where a new section begins.

How to add a section header name:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Event Pages** page will display.
6. Click the **Edit** link next to the section you wish to add the section header to.
7. Scroll down to the **Add new component** area and select the “A Custom Component” radio button.
8. Choose **Display Field** as the Custom Component. See *Figure 18*.
9. Enter **label for display**. For example: Survey Header
10. Enter the **identifier** (the back-end name stored in database). For example: EX02_survey_header.
11. Select the appropriate “Place this component” radio button to set the **component placement**. Headers should be the first component within a section.
12. Click the **Add component** button. The newly added section header will display in the list of components.

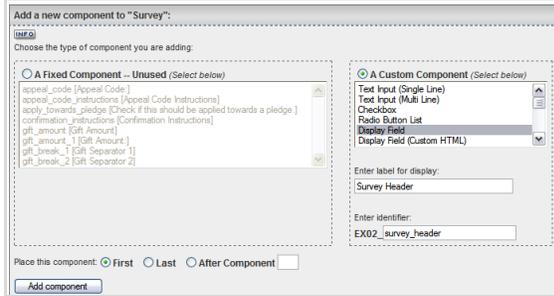


Figure 17

13. Enter the Section Header Name as the **Display Text**. See *Figure 18*.
14. Check the **Section Header Indicator** checkbox.
15. Click the **Save Changes** button, or **Cancel** to abort.



Figure 18

Edit Section Header Name

Administrators have the ability to modify section header names.

How to edit a section header name:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Event** page will display.
6. Click the **Edit** link next to the section you wish to rename. The **Edit Section** <section_name> page will display. See Figure 19.
7. Click the **Edit** link next to the section header component. The **Edit Component** <component_name> page will display. See Figure 20.
8. Update **Display Text**.
9. Click the **Save Changes** button, or click **Cancel** to abort.

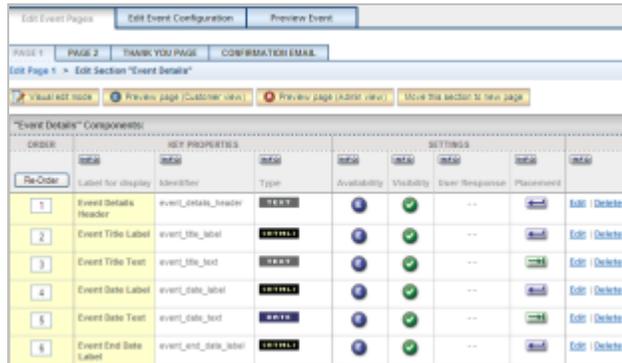


Figure 19



Figure 20

Note: This will change the header as it appears to the end user.

Rename Section

Rename allows administrators to rename a section for backend view only.

How to rename a section:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Event Pages** will display.
6. Click the **Rename** link next to the section you wish to rename. The **Rename** <section_name> page will display. See Figure 21.
7. Enter the new section name.
8. Click the **Rename this section** button.



Figure 21

Move Section

Administrators can move sections to other pages using the Move this section to new page feature.

How to move a section to another page:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Event Pages** will display.
6. Click the **Edit** link next to the section you wish to move.
7. Click the **Move this section to new page** button at the top of the page. See *Figure 22*.
8. Select the page from the dropdown. See *Figure 23*.
9. Click the **Move this section** button, or **Cancel** to abort.

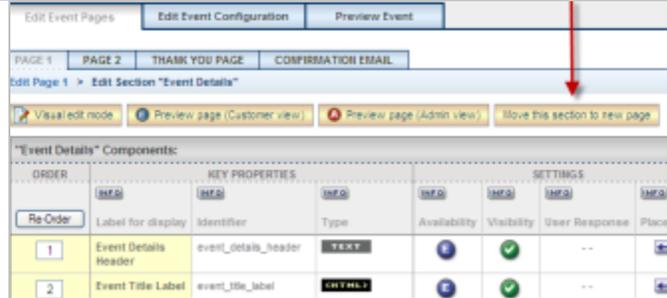


Figure 22

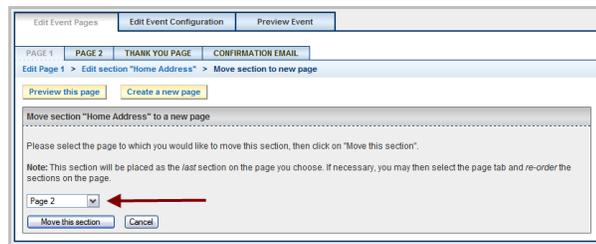


Figure 23

Delete Section

Delete allows administrators to delete unwanted sections. Administrators are **strongly encouraged** to hide sections instead of deleting them so they can easily recover the section if necessary.

How to delete a section:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Event Pages** will display.
6. Click the **Delete** link next to the section you wish to delete. The Delete Section <section_name> page will display. See *Figure 24*.
7. Click the **Delete this section** button, or click **Cancel** to abort.



Figure 24

IMPORTANT!
Do not delete sections with required components used for online processing. See Online Processing Required Fields for more details.

Manage Visibility of Section or Component

Visibility allows administrators to control the visibility of sections and components. Sections and components have two possible states of visibility -- "hidden" or "visible". For additional information click the (INFO) button at the top of the Visibility column.

IMPORTANT!
Do not hide a section or component that is required for online processing such as First Name, Last Name, or Billing Address.
See Required Fields for more information.

How to manage the visibility of a section or component:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events section**.
5. Click the **Edit** link next to the appropriate form. The **Edit Event Pages** will display.
6. To show/hide a **section**, click the icon in the Visibility column to toggle between Visible and Hidden. *See Figure 25.* Depending on the action, a confirmation message will appear; either "Update successful. The selected section will be hidden on the form" or "Update successful. The selected section will be visible on the form."
7. To show/hide a **component**, click the **Edit** link next to the appropriate section to display **components**. The Visibility Icons will function in the same manner as step 6 above.

Visibility Icons	
	Visible Section
	Hidden Section

	Section Name	Availability	Visibility	
	Introduction			Edit
	JavaScript Functions			Edit
	Registered Member Prompt			Edit
1	Update Profile Prompt			Edit Rename Delete
2	Event Details			Edit Rename Delete
3	Order Discount			Edit
4	View Attendance List			Edit Rename Delete
5	Add To Waiting List			Edit Rename Delete
6	Personal Information			Edit Rename Delete

Figure 25

Manage Availability of Section or Component

Availability allows administrators to control whether a section or component will be available to the customer. Sections and components have two possible states of availability -- "Admin-only" or "Everyone". "Admin-only" means that the component or section will be available to administrators – never for customers. Admin-only fields can be populated by the administrator when submitting or modifying a registration and are available to report in custom reporting. "Everyone" means that the component or section will be available to everyone who has access to view the form. For additional information click the (INFO) button at the top of the Availability column.

How to manage the availability of a section or component:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management*

Availability Icons	
	Admin-Only

- sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Event Pages** will display.
6. To manage the availability of a **section**, click the icon in the **Availability** column to toggle between Admin-only and Everyone. See *Figure 25*. Depending on the action, a confirmation message will appear; either “Update successful. The selected section will only be available for administrators.” or “Update successful. The selected component will be available for everyone who can view this form.”
7. To manage the availability of a **component**, click the **Edit** link next to the appropriate section to display components. The **Availability** icons will function in the same manner as step 6 above.

E Everyone

Re-Order	Section Name	Availability	Visibility	
	Introduction	E	✔	Edit
	JavaScript Functions	E	✔	Edit
	Registered Member Prompt	E	✔	Edit
1	Update Profile Prompt	E	⊘	Edit Rename Delete
2	Event Details	E	✔	Edit Rename Delete
3	Order Discount	A	✔	Edit
4	View Attendance List	E	✔	Edit Rename Delete
5	Add To Waiting List	E	✔	Edit Rename Delete
6	Personal Information	E	✔	Edit Rename Delete

Figure 26

Manage Components

Components Types

There are several component types that you can use in your event form. Below is a list of component types and examples of each type.

Component Types	
Graphical Symbol	Description & Example
	Text Input (Single Line): basic single line of input First Name: <input type="text"/>
	Text Input (Multi Line): a textbox/text area input area Comments: <input type="text"/>
<input checked="" type="checkbox"/> CHECKBOX	Checkbox: a single checkbox <input checked="" type="checkbox"/> Option 1 <input checked="" type="checkbox"/> Option 2 <input type="checkbox"/> Option 3
<input type="radio"/> RADIO LIST	Radio Button List: a radio button list containing an option list you will be creating <input type="radio"/> Option 1 <input type="radio"/> Option 2 <input type="radio"/> Option 3
	Display Field: straight text to be displayed in the form This is an example of a text display field.
	Display Field (Custom HTML): HTML to be displayed in the form This is an example of a custom HTML component. 
	Dropdown Menu (Custom): a dropdown list containing a custom option list Ice Cream Flavors: <input type="text" value="-- Select --"/>
	Dropdown Menu (State/Provinces) State: <input type="text" value="Virginia"/>
	Dropdown Menu (Countries) Country: <input type="text" value="USA"/>

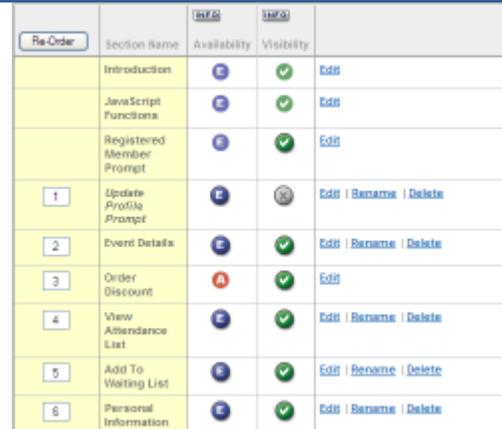
Component Types cont'd	
Graphical Symbol	Description & Example
	Dropdown Menu (Years) Class year: <input type="text" value="1994"/>
	Dropdown Menu (Credit Cards) Credit Card Type: <input type="text" value="Visa"/>
	Dropdown Menu (Months) Expiration Month: <input type="text" value="October"/>
	Dropdown Menu (Expiration Years) Expiration Year: <input type="text" value="-- Select --"/>
	Dropdown Menu (Recurring Billing Frequency) The Frequency Dropdown Menu is specifically for Recurring Payment option. Payments frequency: <input type="text" value="Monthly (1 month)"/>
	Total Billable Amount Total: \$ <input type="text" value="0.00"/>
	Start Date <input type="text" value="January 11, 2010 11:09 AM"/>
	Fixed Link: a link used for the Attendee List, Waitlist, and Add A Guest features <input type="text" value="View Attendance List"/>
	Fixed HTML: a component used for the Matching Guests feature <input type="text" value="Add another quest"/>
	Calendar Date* <input type="text" value="January"/> <input type="text" value="2"/> <input type="text" value="2010"/>
	Preset The Preset component has been mapped to a preset profile data dropdown, so its options list cannot be modified or deleted from the Event Registration application. Modifications must be submitted to your Client Relations Manager.

Re-order Components

Administrators can easily re-order the sequence of components.

How to re-order components:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display. See *Figure 27*.
6. Change the display order numbers in the Re-Order column to the left of the appropriate form sections.
7. Click the **Re-Order** button. The **Edit Page** will refresh with the sections in the new order.



Re-Order	Section Name	Availability	Visibility	
	Introduction			Edit
	JavaScript Functions			Edit
	Registered Member Prompt			Edit
1	Update Profile Prompt			Edit Rename Delete
2	Event Details			Edit Rename Delete
3	Order Discount			Edit
4	View Attendance List			Edit Rename Delete
5	Add To Waiting List			Edit Rename Delete
6	Personal Information			Edit Rename Delete

Figure 27

Add Components

Administrators can add custom form elements such as Radio Buttons, Checkboxes, and Text fields known as custom components to capture registration information.

How to add a component:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit** link next to the section. The **Edit Section** <section_name> page will display.
7. Scroll down to the **Add new component** area and select the “A Custom Component” radio button. See *Figure 28*.
8. Choose the appropriate **type of custom component** to add – see the Custom Component Types grid above for definitions.
9. Enter **label for display**, text seen by front-end users.
10. Enter the **identifier**, back-end name stored in database. Must contain letters, numbers, or underscores (_).

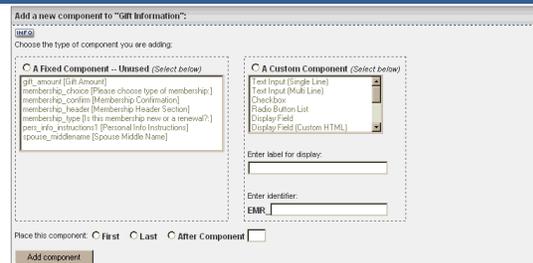


Figure 28

Suggestion: Use intuitive names for identifiers. For example: If the Label for display is “*Alumni Ticket*”, the identifier should be “*ORG_alumni_ticket*”.

Note: The Fixed Component feature is not currently used.

Select the appropriate “Place this component” radio button to set the **component placement**. Click the **Add component** button. The newly added component will display in the list of components.

Move Component

Move component allows an administrator to move a component to a different section, specifically to the bottom of that section. This is a move function, not a copy function, therefore after this is saved this component will no longer exist as part of the current section.

How to move a component to another section:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
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 **Move to another section** dropdown menu. See *Figure 29*.
8. Click **Save Changes**, or **Cancel** to abort.

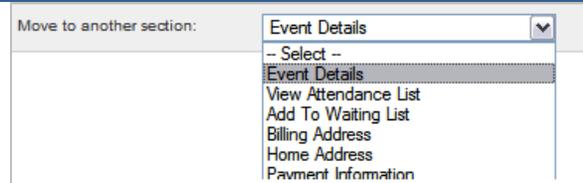


Figure 29

Edit Component Properties

Administrators have the ability to configure a component by modifying its properties.

How to edit component properties:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit** link next to the section. The **Edit Section** <section_name> page will display.
7. Click the **Edit** link next to the component. The component properties page will display. See the processes and property pages for each of the custom component types below in the associated sections.

Text Input (Single Line) Component

Text Input (Single Line) component allows the registrant to submit free form information. The input to be collected can be changed from Text to Monetary or Quantity for event-specific data such as Gift Amount or # event of tickets.

How to edit a text input (single line) text component:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit** link next to the section. The **Edit Section <section_name>** page will display.
7. Scroll down to the **Add new component** area and select the "A Custom Component" radio button.
8. Choose the appropriate **type of custom component** to add – see the Custom Component Types grid above for definitions.
9. Enter **label for display** which is the text seen by front-end users.
10. Enter the **identifier**, back-end name stored in database. Must contain letters, numbers, or underscores (_).
11. Select the appropriate "Place this component" radio button to set the **component placement**.

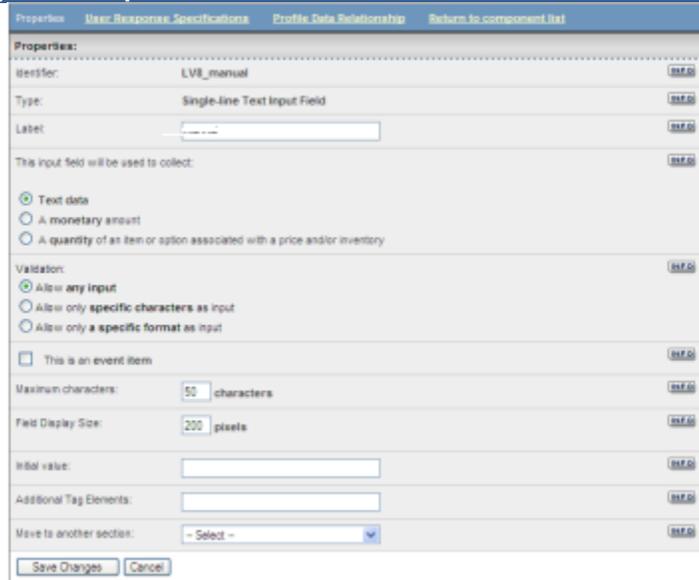


Figure 30

12. Click the **Add component** button. The newly added component will display in the list of components.
13. Click the **Edit** link next to the newly added component. The component properties page will display. See *Figure 30*.
14. Click **Save Changes**, or Cancel to abort.

IMPORTANT!
Monetary Text Input components must be added to the Total Billable Component.

Text Input (Single Line) Monetary Component

Text Input (Single Line) Monetary component allows registrants to enter any dollar amount. It can be used to capture the registrant’s online gift amount. See *Figure 31*. The Text Input (Single Line) Monetary component can also be used for a required registration fee. Add “disabled” to the **Additional Tag Elements** field for required registration fee component.



Figure 31

How to add a text input (single line) monetary component:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit** link next to the section. The **Edit Section** <section_name> page will display.
7. Scroll down to the **Add new component** area and select the “A Custom Component” radio button.
8. Choose the appropriate **type of custom component** to add – see the Custom Component Types grid below for definitions.
9. Enter **label for display**, text seen by front-end users.
10. Enter the **identifier**, back-end name stored in database. Must contain letters, numbers, or underscores (_).
11. Select the appropriate “Place this component” radio button to set the **component placement**.
12. Click the **Add component** button. The newly added component will display in the list of components.
13. Click the **Edit** link next to the newly added component. The component properties page will display. See *Figure 32*.
14. Change **This input will be used to collect** from **Text** to **Monetary**.

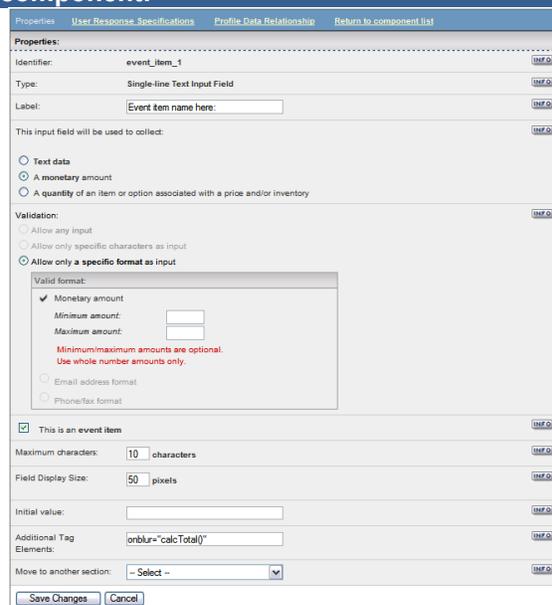


Figure 32

15. Enter the **Minimum** and **Maximum** amounts allowed under **Validation**, if applicable.
16. Check the **Event item** checkbox.
17. Set **Maximum characters** to 10 characters.
18. Set **Field Display Size** to 50 pixels.
19. Click **Save Changes**, or **Cancel** to abort.

IMPORTANT!
Monetary Text Input components must be added to the Total Billable Component.

Quantity Text Input

Text Input (Single Line) Quantity component is used to capture the quantity and display the fixed price or text to indicate the event item is free. See Figure 33.



Figure 33

How to add a text input (single line) quantity component:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit** link next to the section. The **Edit Section** <section_name> page will display.
7. Scroll down to the **Add new component** area and select the “A Custom Component” radio button.
8. Choose the appropriate **type of custom component** to add – see the Custom Component Types grid below for definitions.
9. Enter **label for display**, text seen by front-end users.
10. Enter the **identifier**, back-end name stored in database. Must contain letters, numbers, or underscores (_).
11. Select the appropriate “Place this component” radio button to set the **component placement**.
12. Click the **Add component** button. The newly added component will display in the list of components.
13. Click the **Edit** link next to the newly added component. The component properties page will display. See Figure 34.
14. Change **This input will be used to collect** from **Text Data** to **A Quantity of an item associated with a price and/or inventory**.
15. Enter the Item Price, or check the free checkbox. If the item is free, select the appropriate Free Text to display.

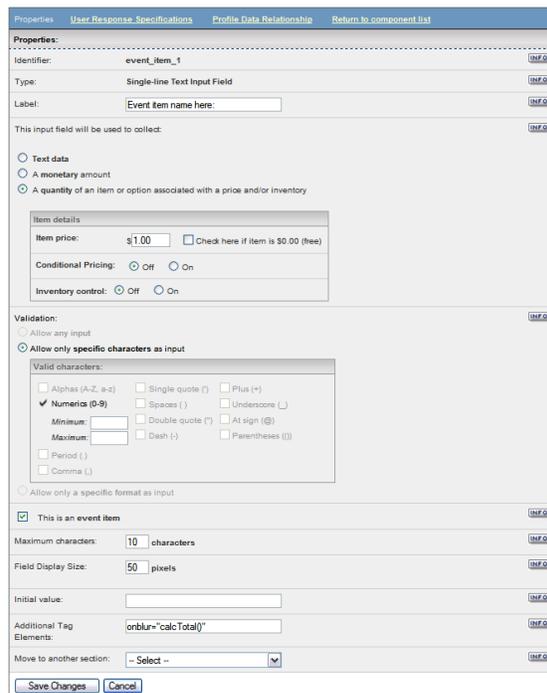


Figure 34

16. Enter the **Minimum** and **Maximum** value allowed under **Validation**, if applicable.
17. Check the **Event item** checkbox.
18. Set **Maximum characters** to 10 characters.
19. Set **Field Display Size** to 50 pixels.
20. Click **Save Changes**, or Cancel to abort.

IMPORTANT!
Text Input (Single Line) Quantity components must be added to the Total Billable Component.
This includes Free Text Input (Single Line) Quantity components.

Configurable Free Text

Administrators have the ability to select \$0.00, Free, Complimentary, No charge, Do not display anything, or Custom text such as "Included in package price" or "On the house" as the text to display for the price of free items. See Figure 35.

Figure 35

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 profile database. In the figure below, the Alumni Discount will display for all registrants with Membership Type = "alumni". See Figure 36.

Figure 36

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 Sept. 1, 2008 1:00 AM Eastern to November 4, 2008 11:55 PM Eastern. See Figure 37.

Figure 37

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.*

Price level

Price level name:

Note: this is for editing purposes only. It will not display to the customer.

Price:

Criteria for this price level: Use profile data Use dates

Profile data:

Miscellaneous: Membership Type

is equal to

Start date:

Date:

Time: :

End date:

Enable

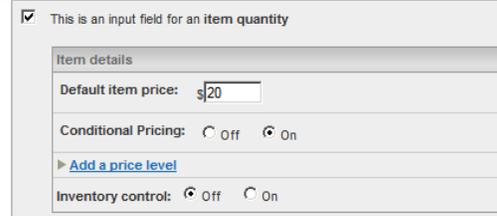
Date:

Time: :

Activate Conditional Pricing

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 38.
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 data and/or use dates).



This is an input field for an item quantity

Item details

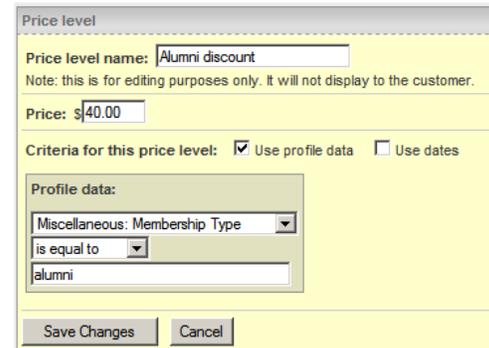
Default item price: \$20

Conditional Pricing: Off On

[Add a price level](#)

Inventory control: Off On

Figure 38



Price level

Price level name: Alumni discount

Note: this is for editing purposes only. It will not display to the customer.

Price: \$40.00

Criteria for this price level: Use profile data Use dates

Profile data:

Miscellaneous: Membership Type

is equal to

alumni

Save Changes Cancel

Figure 39

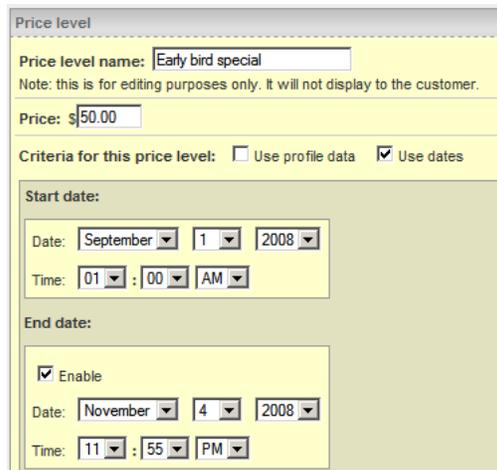
Using Profile Data:

10. Select the applicable profile data field from the dropdown menu. See Figure 39.
11. Select is equal to or is not equal to.
12. Enter value.

Using Dates:

13. Enter the **Start** and **End date**. See Figure 40.
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.



Price level

Price level name: Early bird special

Note: this is for editing purposes only. It will not display to the customer.

Price: \$50.00

Criteria for this price level: Use profile data Use dates

Start date:

Date: September 1 2008

Time: 01 : 00 AM

End date:

Enable

Date: November 4 2008

Time: 11 : 55 PM

Figure 40

Inventory Control

Inventory Control is used when there is a strict limit to the number of items available. If there is no limit of tickets set Inventory Control to Off. The Event Registration application will automatically manage the Currently Available when orders are submitted and modified. Administrators will have the option to return inventory when cancelling an order.

How to set inventory control for a quantity text input component:

1. Log into the **Admin Tool**.
2. Click the **Event Registration** link in the left navigation located under Community Services.
3. Scroll down to the **Manage Events** 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 page will display.
7. Set the **Inventory control** to on. The Inventory Details section will display. See *Figure 41*.
8. Enter the **Total units**.
9. Select the appropriate out-of-stock option.
10. Click **Save Changes** button, or **Cancel** to abort.

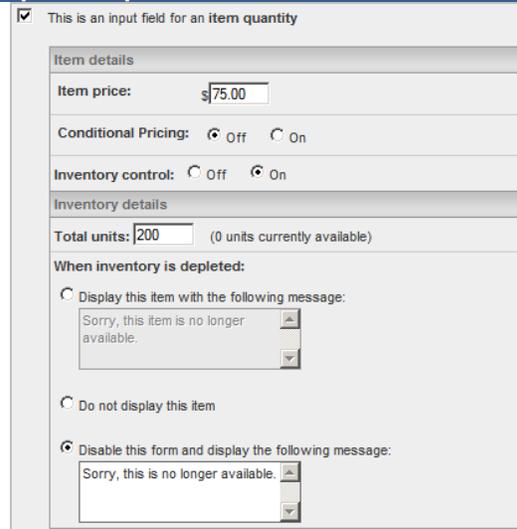
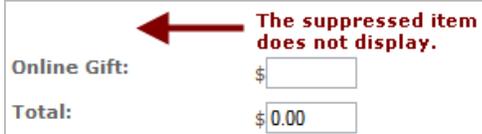
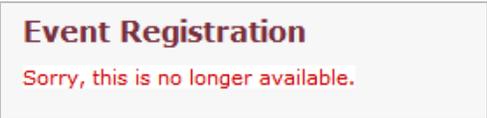


Figure 41

Out-of-stock Options		
Out-of-stock Message	Display this item with the following message	The event item will be disabled and the message in the text area will display on the form under the event item. 
Suppress Event Item	Do not display this item	The event form displays without this event item. 
Control Item	Disable this form and display the following message	The entire event form will be disabled, and the message in the text area will display. 

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 shared inventory:

1. Add a component for the first ticket type (master) as a Text Input (Single Line) Component in the Event Details section.
 2. Click the **Edit** link next to the master ticket type component.
 3. Choose **This input field will be used to collect: A quantity of an item or option associated with a price and/or inventory.**
 4. Enter the **Item price** in the Item details section.
 5. Set the **Inventory Control** to **On**. The **Inventory details** section will display.
 6. Enter the numbers of tickets as the **Total Units** in the **Inventory details** section.
 7. Select the appropriate **When inventory is depleted** option and enter any associated message if applicable.
 8. Check the **This is an event item** checkbox.
 9. Click the **Save Changes** button. *See Figure 42.*
-
10. Return to the Edit Section “Event Details” page.
 11. Add a component for the second ticket type (secondary) as a Text Input (Single Line) Component in the Event Details section.
 12. Click the **Edit** link next to the secondary ticket type component.
 13. Check the **This is an event item** checkbox.
 14. Click the **Save changes** button. The page will refresh.
NOTE: This Save changes

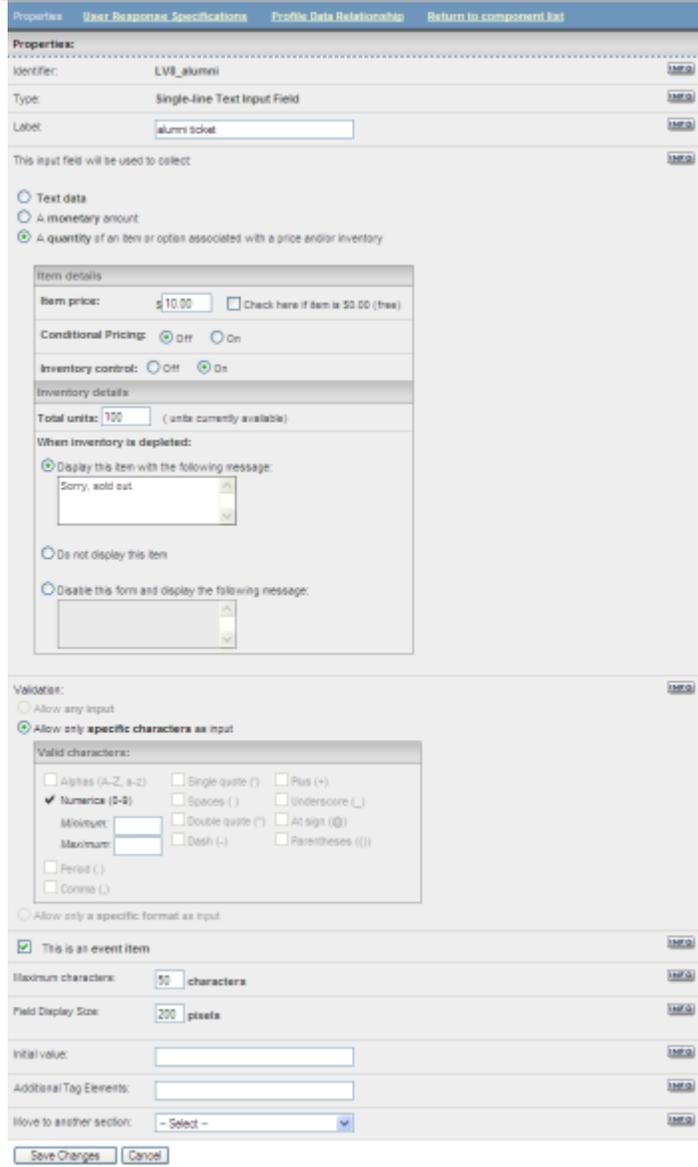
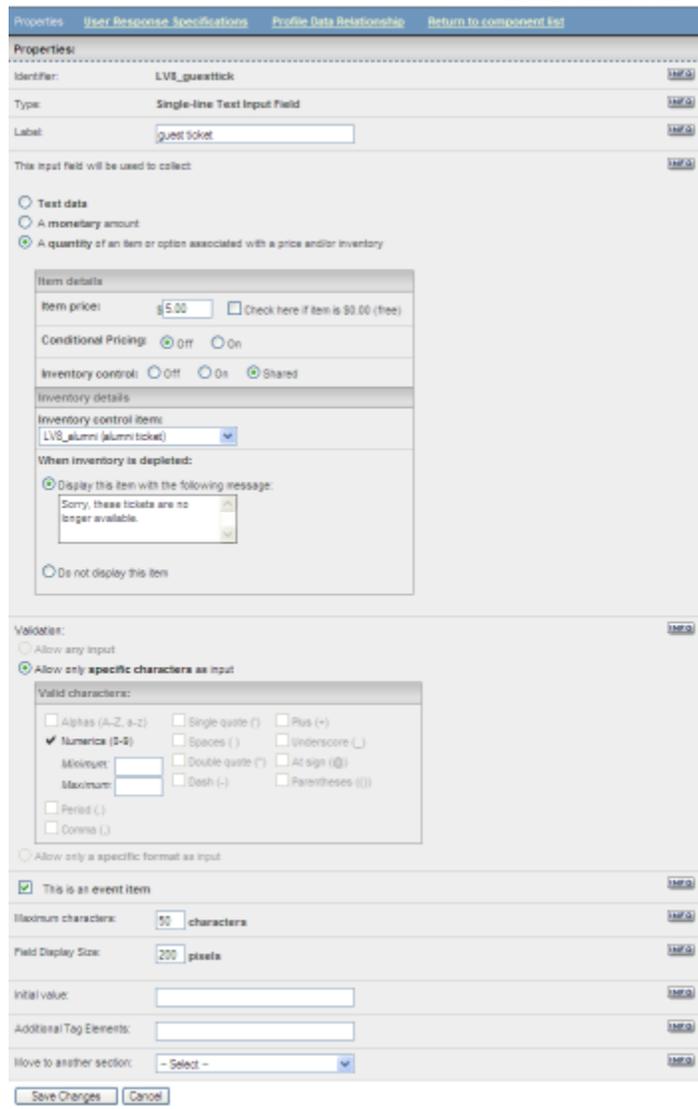


Figure 42

step must be completed in this sequence.

15. On the refreshed page, check **This input field will be used to collect: A quantity of an item of option associated with a price and/or inventory.** The item details section will display.
16. Enter the **Item price** in the Item details section.
17. Select the **Shared** radio button for the Inventory control option.
18. The **Inventory details** section will expand.
19. Select the **Inventory control item** from the dropdown menu. Choose the master ticket item with which this secondary ticket item is sharing inventory.
20. Select the appropriate **When inventory is depleted** option and enter any associated message if applicable.
21. Click **Save Changes** button, or **Cancel** to abort. See Figure 43.

Note: Once these two components are created as described above, the *Inventory Details* section for the master ticket type component will display a “This item’s inventory is shared by the following items” message that refers to the secondary ticket type component.



The screenshot shows the configuration page for a ticket type. The 'Properties' tab is active, showing the following settings:

- Identifier:** LVB_guestticket
- Type:** Single-line Text Input Field
- Label:** guest ticket
- Collection:** A quantity of an item of option associated with a price and/or inventory (selected)
- Item details:**
 - Item price:** \$5.00
 - Inventory control:** Shared (selected)
 - Inventory control items:** LVB_alumni (alumni ticket)
 - When inventory is depleted:** Display this item with the following message: "Sorry, these tickets are no longer available."
- Validation:** Allow only specific characters as input (selected)
 - Valid characters:**
 - Numerics (0-9)
 - Single quote (')
 - Plus (+)
 - Spaces ()
 - Double quote (")
 - At sign (@)
 - Dash (-)
 - Parentheses (())
 - Period (.)
 - Comma (,)
 - Underscore (_)
- Other settings:**
 - This is an event item
 - Maximum characters:** 50
 - Field Display Size:** 200 pixels
 - Initial value:** (empty)
 - Additional Tag Elements:** (empty)
 - Move to another section:** - Select -

Figure 43

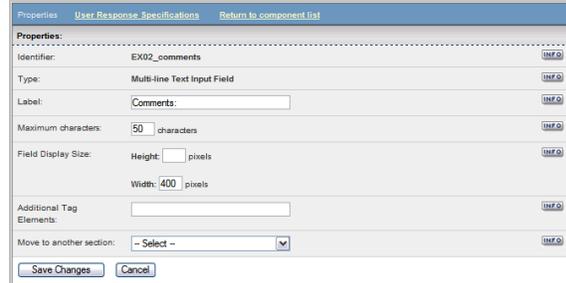
Text Input (Multi Line) Component

How to edit Text Input (Multi Line) component:

1. Edit **Label**. See *Figure 44*.
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.

IMPORTANT!

The character limit is 1,000 for Text Input (Multi-line) Components. Be sure to add text to warn registrants.



Properties		User Response	Specifications	Return to component list
Identifier:	EX02_comments			[INFO]
Type:	Multi-line Text Input Field			[INFO]
Label:	Comments			[INFO]
Maximum characters:	50 characters			[INFO]
Field Display Size:	Height: [] pixels			[INFO]
	Width: 400 pixels			
Additional Tag Elements:	[]			[INFO]
Move to another section:	-- Select --			[INFO]
[Save Changes]		[Cancel]		

Figure 44

Checkbox Component

Checkboxes are used when you want the user to select one or more options of a limited number of choices. See *Figure 45*.

Yes, I would like to purchase a monthly subscription to Wine Time.

Figure 45

How to add a checkbox component:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit** link next to the section. The **Edit Section** <section_name> page will display.
7. Choose Add **A Custom Component** for **Checkbox**, then click Add component button.
8. Click the **Edit** link next to the new component.
The component properties page will display. See *Figure 46*.
9. Check the This is an event item checkbox.
10. Select the Initial setting, if you wish the checkbox to be “checked” by default.
11. Click Save Changes button, or Cancel to abort.

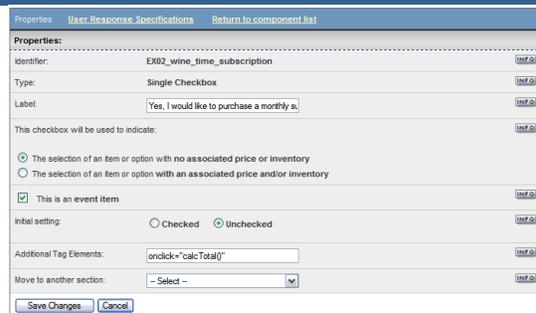


Figure 46

Checkbox Component with Price and/or Inventory

Checkbox components may include pricing and inventory control. See *Figure 47*.

Yes, I would like to purchase a monthly subscription to Wine Time. (\$10.00)

Figure 47

How to add a checkbox component with price and/or inventory:

1. Follow the steps above for adding add a regular checkbox component.
2. Select **This checkbox will be used to indicate: The selection of an item or option with an associated price and/or inventory** radio button on the component properties page. The **Item details** section will appear. See *Figure 48*.
3. Enter the **Item price**, or check the free checkbox. If the item is free, select the appropriate free text.
4. Set **Conditional Pricing**, if applicable. See Conditional Pricing for more details.
5. Set **Inventory Control**, if applicable. See Inventory Control for more details.
6. Click Save Changes button.

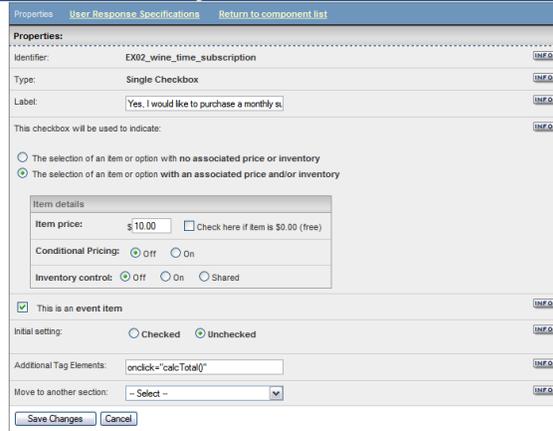


Figure 48

IMPORTANT!
 Checkbox components with a price must be added to the Total Billable Component. This includes free checkbox components.

Radio Button Component

Radio Buttons are used when you want the user to select one of a limited number of choices. See *Figure 49*. The data collected can be text, numeric, price, or quantity with a fixed unit price.



Figure 49

How to edit a text radio button component:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit** link next to the section. The **Edit Section** <section_name> page will display.
7. Click the **Edit** link next to the component. The component properties page will display. See *Figure 49*.



Figure 50

- Click the View or edit options list link. The options list will display. See Figure 50.

[Hide options list](#)

OPTIONS LIST INFO					
Edit options Add options					
Re-Order	Display Label	Internal Label	Add'l Tag Elements	Value (optional)	
1	Option 1	option_1			Delete Hide
2	Option 2	option_2			Delete Hide
Re-Order					
Edit options Add options					

Figure 51

- Click the **Edit options** link. The **Options List** will display in edit mode. See Figure 52.

OPTIONS LIST INFO					
Save options Cancel					
Re-Order	Display Label	Internal Label	Add'l Tag Elements	Value (optional)	
1	<input type="text" value="Option 1"/>	<input type="text" value="option_1"/>	<input type="text"/>	<input type="text"/>	Delete Hide
2	<input type="text" value="Option 2"/>	<input type="text" value="option_2"/>	<input type="text"/>	<input type="text"/>	Delete Hide
Re-Order					
Save options Cancel					

Figure 52

- Update the **Display Label** and **Internal Label** for each option.
- Click the **Save options** link. The radio button component properties page will refresh.
- Select **Text** as the type of radio button option.
- Check the **This is an event item** checkbox.
- Click **Save changes** or **Cancel** to abort.

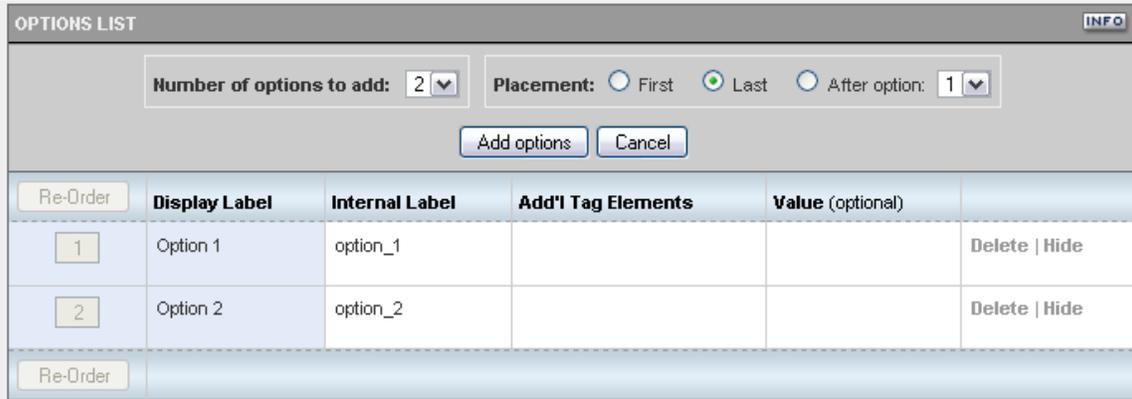
Add Radio Button Options

Additional radio button options can be added using the **Add Options** feature on the radio buttons component properties page.

How to add more radio button options:

- Log into the **Administration Center**.
- Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
- Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
- Scroll down to the **Manage Events** section.
- Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.

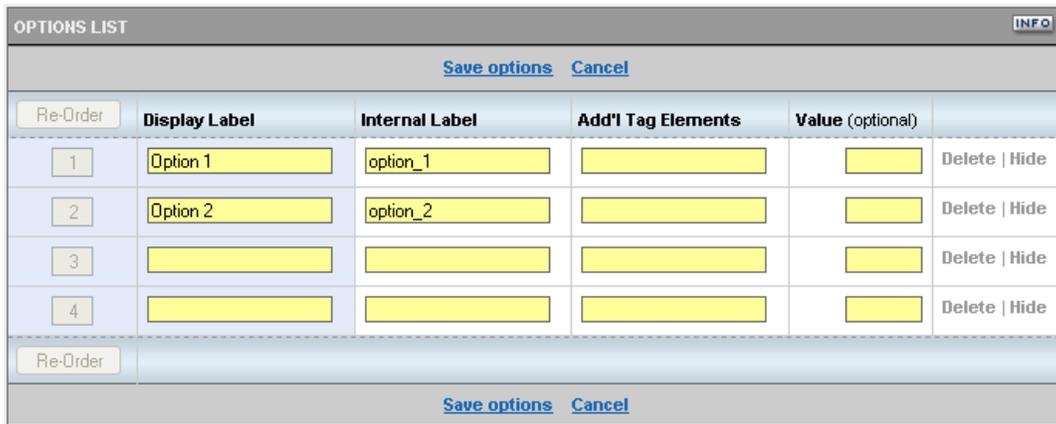
6. Click the **Edit** link next to the section. The **Edit Section** <section_name> page will display.
7. Click the **Edit** link next to the component. The component properties page will display.
8. Click the **View or edit options list** link. The options list will display in add options mode. See *Figure 53*.



Re-Order	Display Label	Internal Label	Add'l Tag Elements	Value (optional)	
1	Option 1	option_1			Delete Hide
2	Option 2	option_2			Delete Hide

Figure 53

9. Select the **Number of options to add**.
10. Select the **Placement**.
11. Click the **Add options** button. The radio button options page will refresh with the options list in edit mode. The correct number of additional options will display in the appropriate placement. See *Figure 54*.



Re-Order	Display Label	Internal Label	Add'l Tag Elements	Value (optional)	
1	Option 1	option_1			Delete Hide
2	Option 2	option_2			Delete Hide
3					Delete Hide
4					Delete Hide

Figure 54

12. Enter the **Display Label** and **Internal Label** for all options.
13. Click **Save options** link, or **Cancel** to abort.
14. Click **Save Changes** button, or **Cancel** to abort.

Radio Button Numeric Component

Radio button component can be configured to store numerical data for each option such as course codes or special admin codes. See *Figure 55*.

Career Networking Session I

- Managing the First Impression**
- Resume Writing 101**
- Quick Start Your Job Search**
- Reinvent Your Career**

Figure 55

How to add a numeric radio button component:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit** link next to the section. The **Edit Section** <section_name> page will display.
7. Click the **Edit** link next to the component.
8. The component properties page will display.
9. Select **Numeric** as the type of radio button option.
10. Click the **View or edit options list** link. The options list will display.
11. Click the **Edit options** link. The Options List will display in edit mode.
12. Update the **Display Label**, **Internal Label** (optional), and the **Numeric Value** for each option. See *Figure 56*.
13. Click the **Save options** link. The radio button component properties page will refresh.
14. Check the **This is an event item** checkbox.
15. Click **Save changes**, or **Cancel** to abort.

The options on this radio button list are:

Text options
 Numeric options
 Price options
 Quantity options associated with a fixed price

[Hide options list](#)

OPTIONS LIST INFO					
Save options Cancel					
Re-Order	Display Label	Internal Label	Add'l Tag Elements	Numeric value	Delete Hide
1	Managing the First Impre	Managing the First Impre		1975	Delete Hide
2	Resume Writing 101	Resume Writing 101		2495	Delete Hide
3	Quick Start Your Job Ses	Quick Start Your Job Ses		2587	Delete Hide
4	Reinvent Your Career	Reinvent Your Career		3119	Delete Hide
Re-Order					

Figure 56

Radio Button Price Component

Radio button component can be configured to have different price points for each option or a fixed unit price which is multiplied by the quantity selected. See Figure 57.

Preferred Seating:

Open Seating (\$0.00)

Reserved Seating (\$5.00)

Terrace Seating (\$10.00)

VIP Seating (\$20.00)

Figure 57

How to add a price radio button component:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit** link next to the section. The **Edit Section** <section_name> page will display.
7. Click the **Edit** link next to the component.
8. The component properties page will display.
9. Select **Price** as the type of radio button option.
10. Click the **View or edit options list** link. The options list will display.
11. Click the **Edit options** link. The Options List will display in edit mode.
12. Update the **Display Label**, **Internal Label**, and the **Price** for each option. See Figure 58.

The options on this radio button list are:

Text options
 Numeric options
 Price options
 Quantity options associated with a fixed price

[Hide options list](#)

Re-Order	Display Label	Internal Label	Add'l Tag Elements	Price	
1	Open Seating	Open	onclick="calcTotal()"	\$0.00	Delete Hide
2	Reserved Seating	Reserved	onclick="calcTotal()"	\$5.00	Delete Hide
3	Terrace Seating	Terrace	onclick="calcTotal()"	\$10.00	Delete Hide
4	VIP Seating	VIP	onclick="calcTotal()"	\$20.00	Delete Hide

[Re-Order](#) [Edit options](#) [Add options](#)

Figure 58

Note: The **Add'l Tag Element** will be set automatically once the radio button price component is added to the Total Billable component.

13. Click the **Save options** link. The radio button component properties page will refresh.
14. Check the **This is an event item** checkbox.
15. Click **Save changes**, or **Cancel** to abort.

IMPORTANT!

Radio button price components must be added to the Total Billable Component. This includes free radio button price components.

Radio Button Quantity Component

Radio button component can be configured to have a fixed unit price which is multiplied by the quantity selected. See Figure 59.

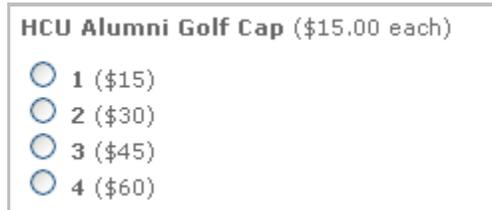
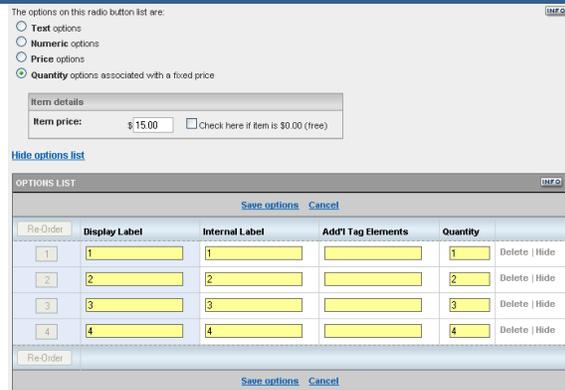


Figure 59

How to add a quantity radio button component:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit** link next to the section. The **Edit Section** <section_name> page will display.
7. Click the Edit link next to the component.
8. The component properties page will display.
9. Select **Quantity** as the type of radio button option.
10. Enter the fixed unit price as the **Item price**, or check the free checkbox. If the items are free, select the appropriate free text. See Figure 60.
11. Click the **View or edit options list** link. The options list will display.
12. Click the **Edit options** link. The Options List will display in edit mode.
13. Update the **Display Label**, **Internal Label** (optional), and the **Quantity** for each option.



Re-Order	Display Label	Internal Label	Add'l Tag Elements	Quantity	
1				1	Delete Hide
2				2	Delete Hide
3				3	Delete Hide
4				4	Delete Hide

Figure 60

Note: The **Add'l Tag Element** will be set automatically once the radio button price component is added to the **Total Billable** component.

14. Click the **Save options** link. The radio button component properties page will refresh.
15. Check the **This is an event item** checkbox.
16. Click **Save changes** or **Cancel** to abort.

IMPORTANT!

Radio button quantity components must be added to the Total Billable Component. This includes free radio button quantity components.

Dropdown Menu Component

Dropdown Menus can serve the same purpose as radio buttons, one selection only, (See *Figure 61*) or check boxes, multiple selections allowed, (See *Figure 62*). The data collected can be text, numeric, price, or quantity with a fixed unit price.

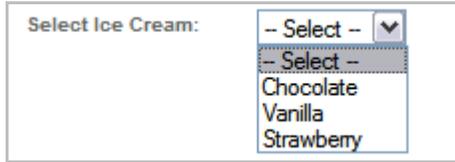


Figure 61

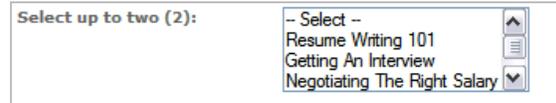


Figure 62

How to add a dropdown menu text component:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit** link next to the section. The **Edit Section** <section_name> page will display.
7. Choose Add **A Custom Component for Dropdown Menu (Custom)** then click Add component button.
8. Click the **Edit** link next to the component. The component properties page will display. See *Figure 63*.
9. Click the **View or edit options list** link. The options list will display. See *Figure 64*.

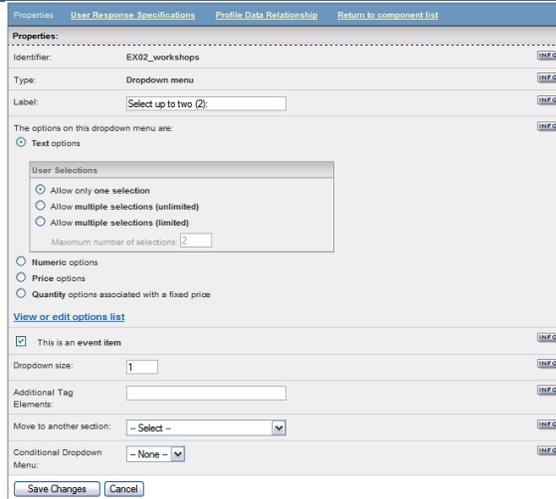


Figure 63

[Hide options list](#)

OPTIONS LIST INFO					
Edit options Add options					
Re-Order	Display Label	Internal Label	Add'l Tag Elements	Value (optional)	
1	Option 1	option_1			Delete Hide
2	Option 2	option_2			Delete Hide
Re-Order					
Edit options Add options					

Figure 64

10. Click the **Edit options** link. The **Options List** will display in edit mode. See *Figure 65*.

OPTIONS LIST INFO					
Save options Cancel					
Re-Order	Display Label	Internal Label	Add'l Tag Elements	Value (optional)	
1	<input type="text" value="Option 1"/>	<input type="text" value="option_1"/>	<input type="text"/>	<input type="text"/>	Delete Hide
2	<input type="text" value="Option 2"/>	<input type="text" value="option_2"/>	<input type="text"/>	<input type="text"/>	Delete Hide
Re-Order					
Save options Cancel					

Figure 65

11. Update the **Display Label** and **Internal Label** for each option.
12. Click the **Save options** link. The dropdown menu component properties page will refresh.
13. Select **Text** as the type of dropdown menu option.
14. Check the **This is an event item** checkbox.
15. Click **Save changes**, or **Cancel** to abort.

Add Dropdown Menu Options

Additional dropdown menu options can be added using the **Add Options** feature on the dropdown menu component properties page.

How to add more dropdown menu options:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit** link next to the section. The **Edit Section** <section_name> page will display.
7. Click the **Edit** link next to the component. The component properties page will display.
8. Click the **View or edit options list** link. The options list will display in add options mode. See *Figure 66*.

OPTIONS LIST INFO

Number of options to add: Placement: First Last After option:

Re-Order	Display Label	Internal Label	Add'l Tag Elements	Value (optional)	
1	Option 1	option_1			Delete Hide
2	Option 2	option_2			Delete Hide
Re-Order					

Figure 66

9. Select the **Number of options to add**.
10. Select the **Placement**.
11. Click the **Add options** button. The dropdown menu options page will refresh with the options list in edit mode. The correct number of additional options will display in the appropriate placement. See *Figure 67*.

OPTIONS LIST INFO

[Save options](#) [Cancel](#)

Re-Order	Display Label	Internal Label	Add'l Tag Elements	Value (optional)	
1	<input type="text" value="Option 1"/>	<input type="text" value="option_1"/>	<input type="text"/>	<input type="text"/>	Delete Hide
2	<input type="text" value="Option 2"/>	<input type="text" value="option_2"/>	<input type="text"/>	<input type="text"/>	Delete Hide
3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete Hide
4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete Hide
Re-Order					

[Save options](#) [Cancel](#)

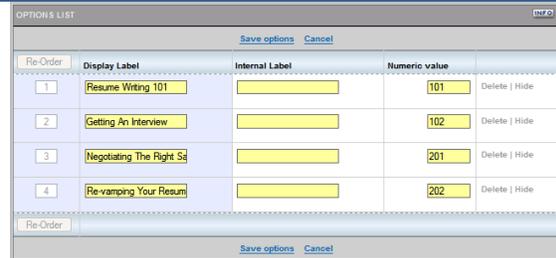
Figure 67

12. Enter the **Display Label** and **Internal Label** for all options.
13. Click **Save options** link, or **Cancel** to abort.
14. Click **Save Changes** button, or **Cancel** to abort.

Dropdown Menu Numeric Component

How to edit a dropdown numeric component:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit** link next to the section. The **Edit Section** <section_name> page will display.
7. Click the **Edit** link next to the component.
8. The component properties page will display.
9. Select **Numeric** as the type of radio button option.
10. Click the **View or edit options list** link. The options list will display.
11. Click the **Edit options** link. The Options List will display in edit mode.
12. Update the **Display Label**, **Internal Label** (optional), and the **Numeric Value** for each option. See *Figure 68*.
13. Click the **Save options** link. The radio button component properties page will refresh.
14. Check the **This is an event item** checkbox.
15. Click **Save changes**, or **Cancel** to abort.



Re-Order	Display Label	Internal Label	Numeric value	
1	Resume Writing 101		101	Delete Hide
2	Getting An Interview		102	Delete Hide
3	Negotiating The Right \$4		201	Delete Hide
4	Re-vamping Your Resum		202	Delete Hide

Figure 68

Dropdown Menu Price Component

Dropdown Menu Price component can be configured to have a different price point for each option or a fixed unit price which is multiplied by the quantity selected. See Figure 69 .

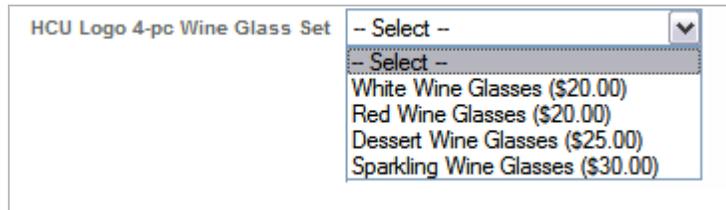
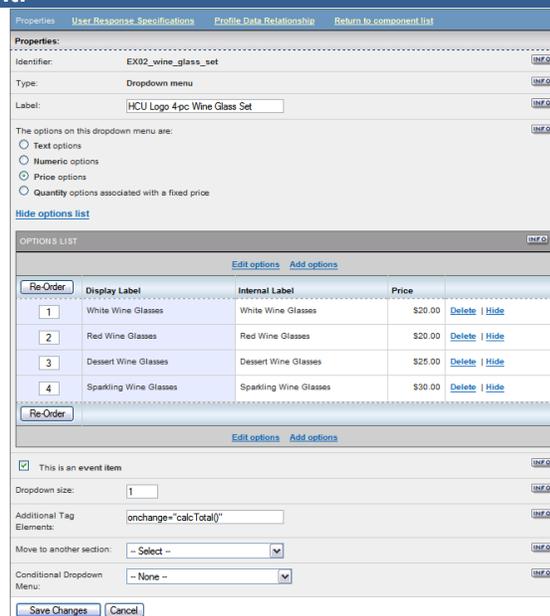


Figure 69

How to add a price dropdown menu component:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear. Scroll down to the **Manage Events** 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.
7. The component properties page will display.
8. Select **Price** as the type of dropdown menu option.
9. Click the **View or edit options list** link. The options list will display. See Figure 70.
10. Click the **Edit options** link to enter or modify the **Display Label**, **Internal Label**, and the **Price** for each option.



Re-Order	Display Label	Internal Label	Price	
1	White Wine Glasses	White Wine Glasses	\$20.00	Delete Hide
2	Red Wine Glasses	Red Wine Glasses	\$20.00	Delete Hide
3	Dessert Wine Glasses	Dessert Wine Glasses	\$25.00	Delete Hide
4	Sparkling Wine Glasses	Sparkling Wine Glasses	\$30.00	Delete Hide

Figure 70

Note: The **Additional Tag Elements** will be set automatically once the dropdown price component is added to the Total Billable component.

11. Click the **Save options** link. The dropdown component properties page will refresh.
12. Check the **This is an event item** checkbox.
13. Click **Save changes**, or **Cancel** to abort.

IMPORTANT!

Dropdown menu price components must be added to the Total Billable Component. This includes free dropdown menu price components.

Dropdown Menu Quantity Component

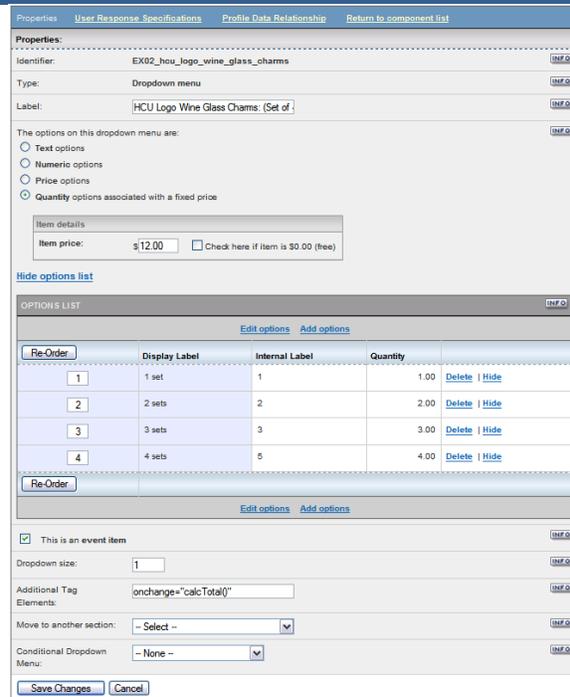
Dropdown menu quantity components can be configured to have a fixed unit price which is multiplied by the quantity selected. See Figure 71.



Figure 71

How to add a dropdown menu quantity component:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear. Scroll down to the **Manage Events** 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.
7. The component properties page will display.
8. Select **Quantity** as the type of dropdown menu option.
9. Enter the fixed unit price as the Item price, or check the free checkbox. If the items are free, select the appropriate free text. See Figure 72.
10. Click the **View or edit options** list link. The options list will display.
11. Click the **Edit options** link. The Options List will display in edit mode.
12. Update the **Display Label**, **Internal Label** (optional), and the **Quantity** for each option.



Re-Order	Display Label	Internal Label	Quantity	
1	1 set	1	1.00	Delete Hide
2	2 sets	2	2.00	Delete Hide
3	3 sets	3	3.00	Delete Hide
4	4 sets	5	4.00	Delete Hide

Figure 72

Note: The **Additional Tag Elements** will be set automatically once the dropdown menu price component is added to the **Total Billable** component.

13. Click the **Save options** link. The dropdown menu component properties page will refresh.
14. Check the **This is an event item** checkbox.
15. Click **Save changes**, or **Cancel** to abort.

IMPORTANT!

Dropdown menu quantity components must be added to the Total Billable Component. This includes free dropdown menu quantity components.

Pre-defined Dropdown Menus

Pre-defined dropdown menus are available to allow an administrator to quickly build an event registration in minimum amount of time. Pre-defined dropdowns are available for Class Year, State, and more.

How to modify pre-defined dropdown menu:

12. Log into the **Administration Center**.
13. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
1. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
2. Scroll down to the **Manage Events** section.
3. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
4. Click the **Edit** link next to the section. The **Edit Section** <section_name> page will display.
5. Choose Add **A Custom Component** for Dropdown Menu (NNNN), then click Add component button
6. Click the **Edit** link next to the new pre-defined dropdown component. The component properties page will display. See *Figure 73*.
7. Click the **Convert now** button. The page will refresh.
8. Click the **View or edit options list** link. See *Figure 74*. The options list will display.
9. Click hide or delete next to the appropriate option or click the **Edit options** link to edit the Display Label. The Options List will display in edit mode.

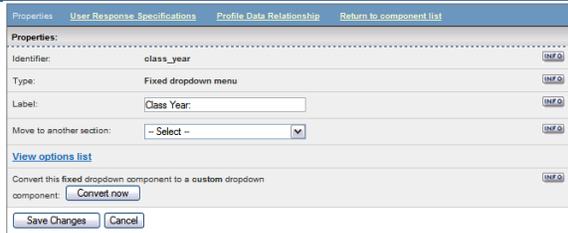


Figure 73

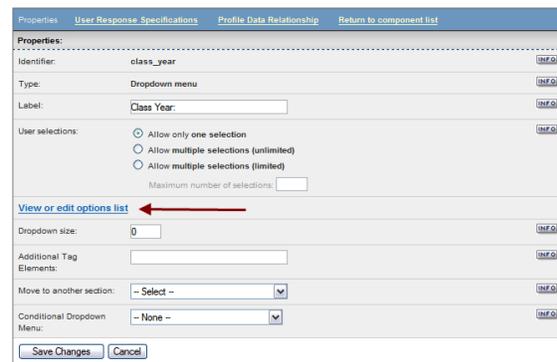


Figure 74

Note: Administrators can edit, delete, and hide options; however, they cannot add additional options. Administrators should not change Internal Labels.

Conditional Dropdown Menus

Administrators have the ability to create dropdown menus where the options within the child dropdown menu (conditional dropdown menu) changes, depending upon which option in the parent dropdown menu are chosen by the end-user. In the example below (See Figure 75), the *Select time* options change depending on which *Free Activity* the end-user selects. Each dropdown menu will be appropriately flagged as “parent” and “conditional” (child) on the backend.

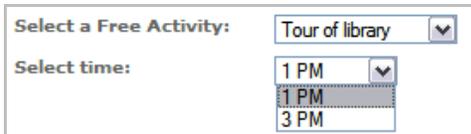


Figure 75



Figure 76

How to add conditional dropdown menus:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit** link next to the section. The Edit Section <section_name> page will display.
7. Create the parent dropdown menu component, and enter the options for parent menu.
8. Create the child dropdown menu component. Do not enter any options for the child menu.
9. Return to the parent dropdown menu's property page.
10. Set the Conditional Dropdown Menu to the child dropdown menu. See Figure 77.
11. Click Save Changes. The parent dropdown menu property page will refresh.
12. The Type will update to indicate "This is a condition. See Figure 78.
13. Return to the child dropdown menu to set the child options for each parent option.
14. Select the parent option in the Options List For dropdown menu. See Figure 79.
15. Add the appropriate child options.

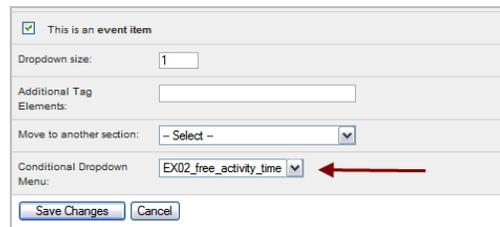


Figure 77



Figure 78



Figure 79

Note: Default child options display only for parent option 1. You will need to add options for parent option 2, 3, and so on.

16. Click Save options.
17. Repeat steps 9-11 for each parent option.
18. Click Save Changes.

Display Field Component

Display field component is used to display informative text on the event registration form such as instructions on how to enter the telephone number. See *Figure 80*.

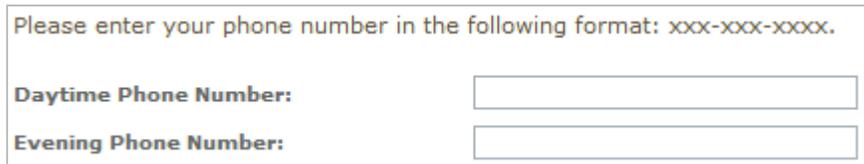


Figure 80

How to edit a display field component:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The Edit Forms page will display.
6. Click the **Edit** link next to the section. The Edit Section <section_name> page will display.
7. Choose Add **A Custom Component for Display Field**, then click Add component button.
8. Click the Edit link next to the Display Field component you wish to edit. The component properties page will display. See *Figure 81*.
9. Add or edit the text in the Display Text field.
10. Click **Save Changes**, or **Cancel** to abort.



Figure 81

Section Header

Check the Section Header Indicator if you wish the text to display as a section header.

Display Field Custom HTML Components

How to edit a display field custom HTML component:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The Edit Forms page will display.
6. Click the **Edit** link next to the section. The Edit Section <section_name> page will display.
7. Click the Edit link next to the Display Field Custom HTML component you wish to edit. The component properties page will display. *See Figure 82.*
8. Choose Add **A Custom Component** for **Display Field (Custom HTML)**, then click Add component button.
9. Add or edit the text in the Display HTML field.
10. Click **Save Changes**, or **Cancel** to abort.

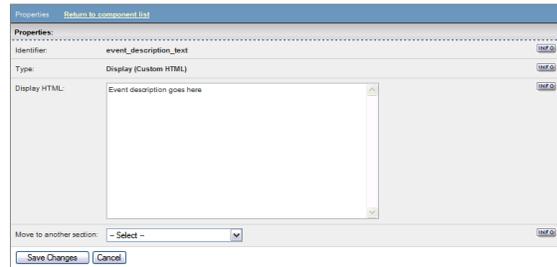


Figure 82

Note: If you do not know how to enter HTML code, you can use the Visual Edit mode's HTML editor to edit this section. See Visual Edit.

User Response Specifications

Administrators have the ability to configure every component in a form that accepts user input as optional (default setting), required, or conditionally required. See *Figure 83*.

User Response:	<input checked="" type="radio"/> Required <input type="radio"/> Optional <input type="radio"/> Conditionally required, based on the specifications below
-----------------------	--

Figure 83

Required Components

How to set a component as required:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit** link next to the section. The **Edit Section** <section_name> page will display.
7. Click the **Edit** link next to the component.
8. Click the optional icon (📄) in the **User Response** field. See *Figure 84*. The list of components page will refresh and a “*Requested component set to REQUIRED*” message will display at the top of the page. The required icon (🔴) display next to the component.

ReOrder	Label for display	Identifier	Visible	Type	User Response	Place On...	
1	Personal Info Label	pers_info_label1	🟢	TEXT	--	←	Edit Delete Hide
2	Title: (Mr., Ms., etc.)	home_prefname	🟢	INPUT	📄	←	Edit Delete Hide
3	First Name:	home_firstname	🟢	INPUT	📄	←	Edit Delete Hide
4	Middle Name:	home_middlename	🟢	INPUT	📄	←	Edit Delete Hide

Figure 84

Optional Components (Default Setting)

How to set a component as optional:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit** link next to the section. The **Edit Section** <section_name> page will display.
7. Click the **Edit** link next to the component.
8. Click the required icon (🔴) in the **User**

11	Event Description Text	event_description_text	🟢	TEXTAREA	--	←	Edit Delete Hide
12	Event item name here:	event_item_1	🟢	INPUT	🔴	←	Edit Delete Hide
13	Total:	event_running_total	🟢	TOTAL	--	←	Edit Delete Hide

Figure 85

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.

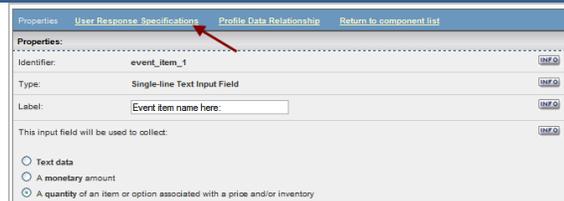
Be sure that all components required for processing are set to required.

Response field. See *Figure 85*. The list of components page will refresh and a “*Requested component set to OPTIONAL*” message will display at the top of the page. The optional icon () display next to the component.

Conditionally Required Components

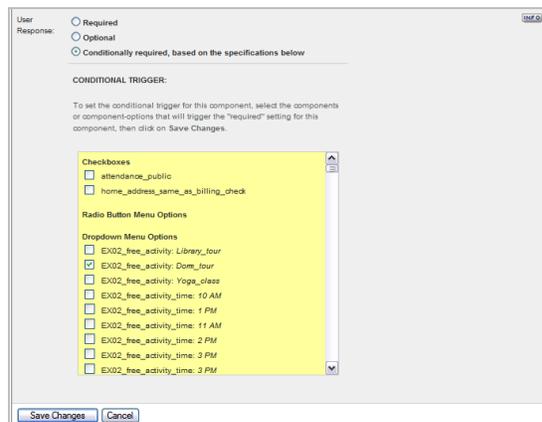
How to set a component as conditionally required:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit** link next to the section. The **Edit Section** <section_name> page will display.
7. Click the **Edit** link next to the component. The component properties will display.
8. Click the **User Response Specifications** link at the top of the **Component Properties** page. See *Figure 86*. The **User Response Specification** page will display.
9. Select the **Conditionally required** radio button. See *Figure 87*.
10. Select the components or component-options that will trigger the "required" setting for this component.
11. Click the **Save Changes**, or **Cancel** to abort.



The screenshot shows the 'Component Properties' page with the 'User Response Specifications' tab selected. The 'Identifier' is 'event_item_1', the 'Type' is 'Single-line Text Input Field', and the 'Label' is 'Event item name here:'. Below this, there are radio buttons for 'Text data', 'A monetary amount', and 'A quantity of an item or option associated with a price and/or inventory'. A red arrow points to the 'User Response Specifications' tab.

Figure 86



The screenshot shows the 'User Response Specification' page. The 'User Response' section has three radio buttons: 'Required', 'Optional', and 'Conditionally required, based on the specifications below'. The 'Conditionally required' option is selected. Below this, there is a 'CONDITIONAL TRIGGER' section with instructions to select components or options. A list of checkboxes is shown, including 'attendance_public', 'home_address_same_as_billing_check', and a list of 'Dropdown Menu Options' for 'EX02_fee_activity' at various times (Library_tour, Dom_tour, Yoga_class, 10 AM, 1 PM, 11 AM, 2 PM, 3 PM, 3 PM).

Figure 87

Online 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:

Label for display	Identifier
First Name:	home_firstname
Last Name:	home_lastname
Address1:	billing_address1 or home_address1
State:	billing_state or home_state [if US or Canada]
Zip:	billing_zip or home_zip [if US or Canada]
Country:	billing_country or home_country [if non-US]
Credit card expiration month:	cc_exp_month
Credit card expiration year:	cc_exp_year
Credit card number:	cc_number
Credit card verification number:	cc_cvn <i>optional</i>

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.

International Event Forms

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

How to configure an event form to handle international registrations:

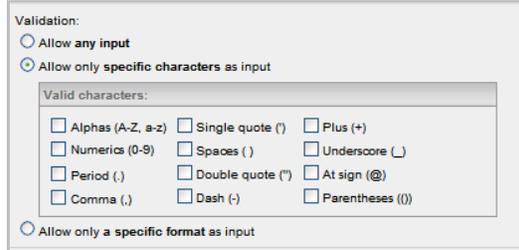
1. Change **State & Postal Code** components from **Required** to **Conditionally required**, based on the specifications below.
2. Set the **Conditional Trigger** for billing_country = US or CA (Canada).

Validation

Setting up validation for a component will result in various data checks being performed related to the data entered by the end-user when the form is submitted.

How to setup validation for a specific text input component:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit** link next to the section. The **Edit Section** <section_name> page will display.
7. Click the **Edit** link next to the component. The component **Properties** will display with the **Validation** section. See *Figure 88*.
8. Select **Allow only specific characters input** radio button, and enter the appropriate valid characters, or **Allow only a specific format as input**. See *Figure 89*.
9. Click **Save Changes**, or **Cancel** to abort.



Validation:

Allow any input

Allow only specific characters as input

Valid characters:

Alphas (A-Z, a-z) Single quote (') Plus (+)

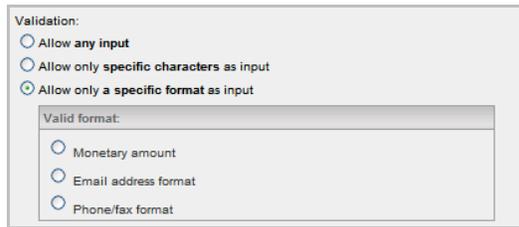
Numerics (0-9) Spaces () Underscore (_)

Period (.) Double quote (") At sign (@)

Comma (,) Dash (-) Parentheses (())

Allow only a specific format as input

Figure 88



Validation:

Allow any input

Allow only specific characters as input

Allow only a specific format as input

Valid format:

Monetary amount

Email address format

Phone/fax format

Figure 89

Default Validation

There is additional field validation that is automatically performed by the payment processor on the following fields, as follows:

Label for display	Identifier	Validation															
Email:	home_email	<ul style="list-style-type: none"> • xxx@xxx.xxx format • >6 characters in length • No blanks • Allowed characters: letters, numbers, _ , - , @ , + , . 															
Phone:	phone_day	<ul style="list-style-type: none"> • 7-20 characters in length • Allowed characters: numbers, - , + , (,) 															
Credit card number:	cc_number	<table border="1"> <thead> <tr> <th>Card Type</th> <th>Prefix</th> <th>Length</th> </tr> </thead> <tbody> <tr> <td>Visa</td> <td>4</td> <td>13, 16</td> </tr> <tr> <td>MasterCard</td> <td>51-55</td> <td>16</td> </tr> <tr> <td>American Express</td> <td>34 37</td> <td>15</td> </tr> <tr> <td>Discover</td> <td>6011</td> <td>16</td> </tr> </tbody> </table>	Card Type	Prefix	Length	Visa	4	13, 16	MasterCard	51-55	16	American Express	34 37	15	Discover	6011	16
Card Type	Prefix	Length															
Visa	4	13, 16															
MasterCard	51-55	16															
American Express	34 37	15															
Discover	6011	16															

Profile Data Relationship

Profile Data Relationship enables administrators to map data from a user's profile to a specific component on the form so that the form component may be pre-populated with the profile data when the form initially displays. Setting this relationship also allows for the possibility of saving the data entered on the form back to profile database when the form is submitted. A user must be logged into the form (using the Registered Member Prompt section) for this feature to work.

How to activate profile data relationship:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit** link next to the section. The **Edit Section** <section_name> page will display.
7. Click the **Edit** link next to the component. The component **Properties** will display.
8. Click the **Profile Data Relationship** link at the top of the component properties page. The Profile Data Relationship page will display. See *Figure 90*.
9. Check the **Display profile data in this component** checkbox.
10. Select the appropriate profile field from the **Profile data** dropdown.
11. 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.

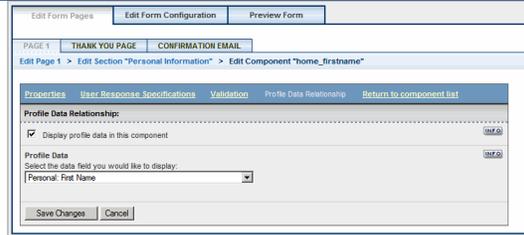


Figure 90

IMPORTANT:

The administrator may select whether or not data entered on the form should be saved back to a member's profile within the Profile Data Management feature of the Edit Event Configuration tab. 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 a Page

Create a page allows an administrator to create a new page that will appear after the current page. The new page will not contain any sections. You will need to move sections to the new page from other pages, or create new sections.

How to create a new page:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Create Page** button at the top of the page. See

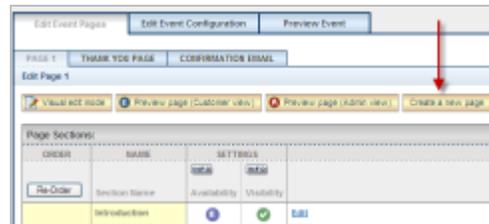
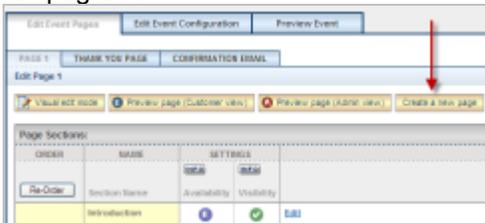


Figure 91



7. See
8. Figure 91
9. 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 92.

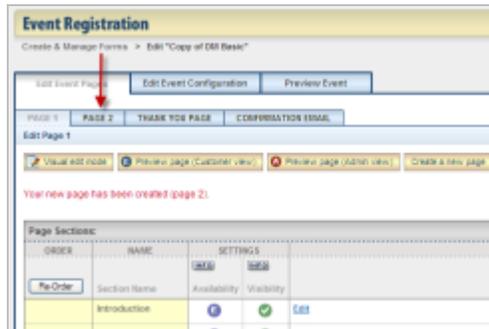


Figure 92

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

Edit Page Properties

Pages are automatically set to display always. An administrator can configure a page to display based on a specific trigger. For example, if the end-user registered for rooming, the rooming registration page could display where the registrant is prompted to select a room type, enter arrival date, departure date, and roommate name(s).

How to edit page properties:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the appropriate page tab.
7. Click the **Edit Page Properties** button at the top of the page.
8. Select the "This page should only display when a user selects the "Conditional Trigger" specified below" radio button. See *Figure 93*.
9. Select the components or component-options which, when selected by the end user, will cause this page to be displayed.
10. Click **Save Changes**, or **Cancel** to abort.

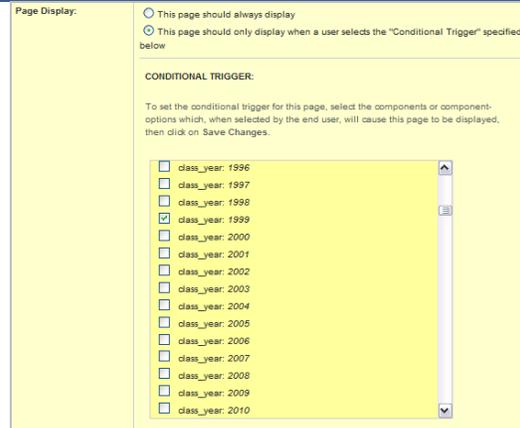


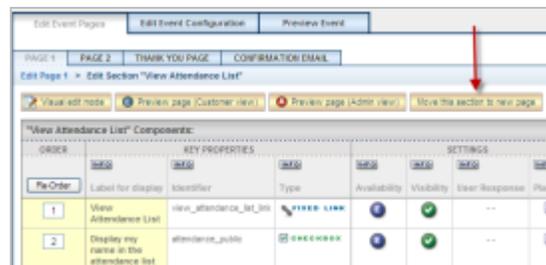
Figure 93

Move Section to New Page

Move this section to new page allows administrators to move sections to a new page easily. This section will be placed as the *last* section on the page you choose. If necessary, you may then select the page tab and *re-order* the sections on the page.

How to move a section to a new page:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit** link next to the appropriate Section. The **Edit Section** <section_name_here> page will display.
7. Click the **Move this section to new page** button. See *Figure 94*.



ORDER	INFO	KEY PROPERTIES	INFO	INFO	INFO	SETTINGS	INFO
1	View Attendance List	view_attendance_list_form	GREEN LINK	Availability	Visibility	View Responses	Plus
2	Display my name in the attendance list	attendance_public	GREEN LINK	Availability	Visibility	View Responses	Plus

Figure 94

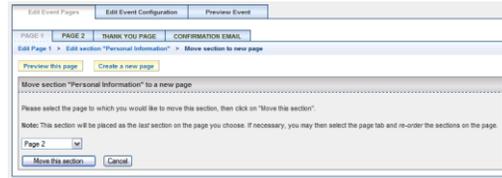
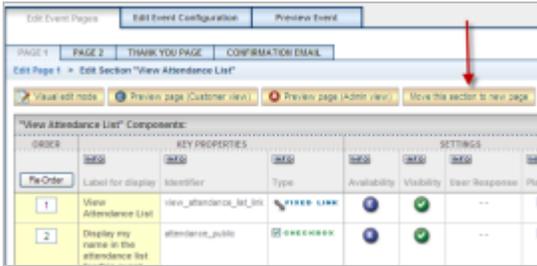


Figure 95

- 8.
9. *Figure 94.*
10. Select the page number from the drop down. See *Figure 95.*
11. 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 This Page

Preview this page allows an administrator to preview the Customer view or the Admin view of the current page without leaving the Edit Event Pages tab.

How to preview a specific page:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the appropriate page tab.
7. Click the **Preview page (Customer view)** button at the top of the screen to view the Customer view. See

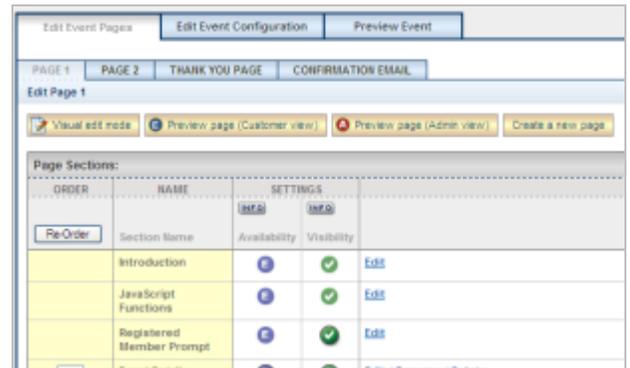
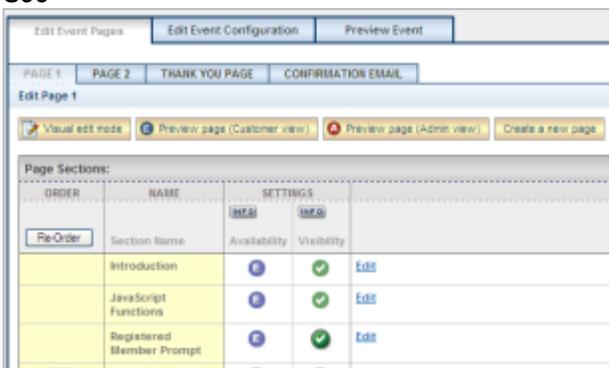
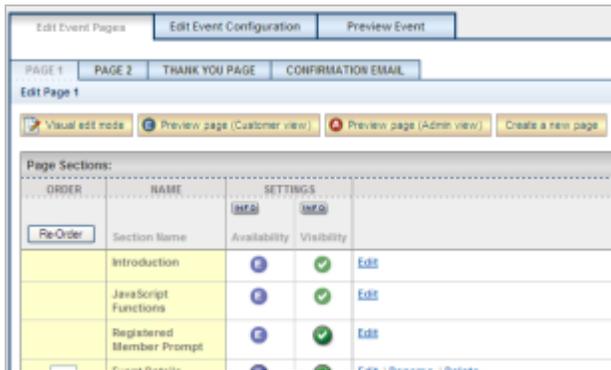


Figure 96



- 8.
9. *Figure 96.*
10. Click the **Preview page (Admin view)** button at the top of the screen to view the Admin view. See



- 11.
12. Figure 96.
13. The front-end version of the event form will display in a new browser window or a new browser tab.

Delete Page

Delete page allows an administrator to delete an unwanted page. All sections and their corresponding components on the deleted page will automatically be moved to the bottom of the previous page.

How to delete a page:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Page #** tab at the top of the page for a page other than Page 1.
7. Click the **Delete this page** button at the top of the screen. See

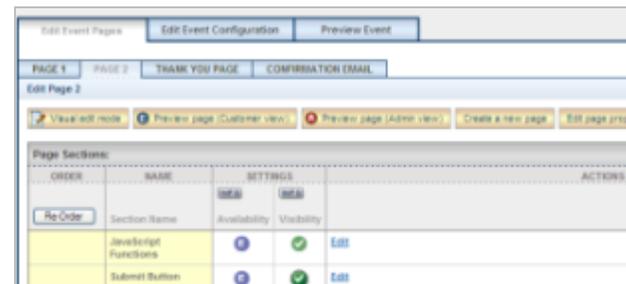


Figure 97

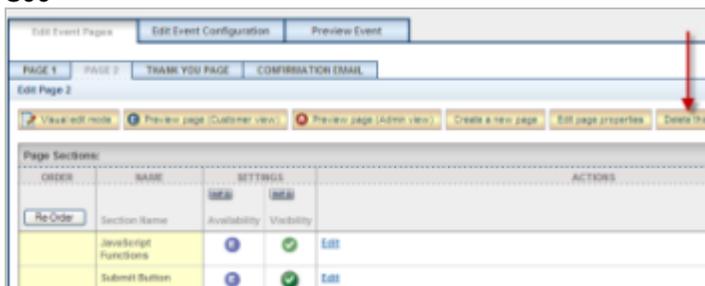


Figure 98

8. Figure 97. An “Are you sure?” page will display. See Figure 98.
9. Click the **Delete this page** button when prompted to confirm the page deletion, or click **Cancel** to abort.

Manage Thank You Page and Confirmation Email

Thank You Page

The Thank You page is fully customizable.

How to edit the Thank You page:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Thank You Page** tab at the top of the page. See *Figure 99*. The **Thank Page** will display in edit mode.
7. Modify the content in the text area provided. See *Figure 100*.
8. Click **Save Changes** or **Cancel** to abort.

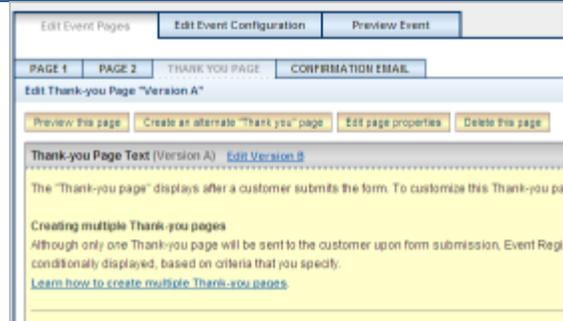


Figure 99

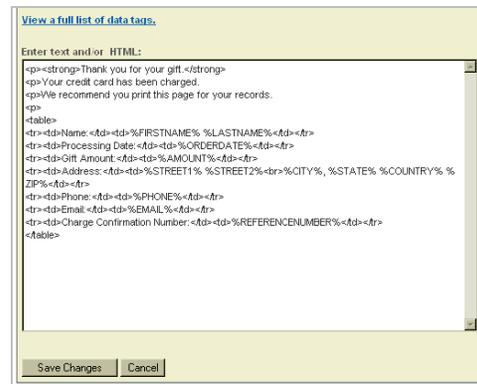


Figure 100

Adding Data Tags

Specific form data can be added to the Thank You page. See Data Tags for more details.

How to preview the Thank You page:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Thank You Page** tab at the top of the page. The **Thank Page** will display in edit mode.
7. Click the **Preview this page** button at the top of the page. See

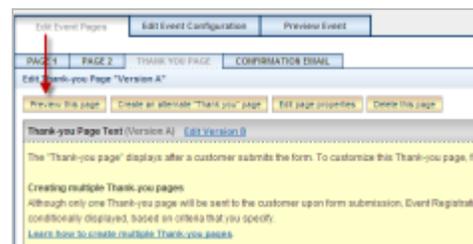
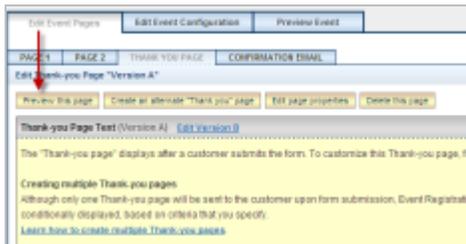


Figure 101



- 8.
9. *Figure 101.* A new browser window or tab will open with the default Thank You page displayed.

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

Data Tags

Administrators can insert data from the submitted form such as the user's name and address into the confirmation emails.

Pre-defined Data Tags

Below is a list of some **pre-defined tags** and the data they represent:

%ORDERDATE%:	Date of submitted form
%ORDERDATETIME%:	Date and Time of submitted form
%FIRSTNAME%:	First name of user
%LASTNAME%:	Last name of user
%EMAIL%:	Email address of user
%STREET1%:	Address: Street (line 1) of user
%CITY%:	Address: City of user
%STATE%:	Address: State of user
%ZIP%:	Address: zip/postal code of user
%PAYMENTTYPE%	Payment method
%AMOUNT%:	Payment amount
%MASKEDCREDITCARDNUMBER%:	Credit card number (note first 11 numbers are asterisks, only last 4 or 5 numbers displayed)
%EVENTTITLE%	Event Title

Dynamic Data Tags

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.

TAG	SECTION
%EX02_regular_tickets%	Event Details
%EX02_young_professional_tickets%	Event Details

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

Event Guest Data Tag

In addition to the dynamic tags listed above, you may include a tag within the text of your confirmation page or email to display the data entered by the user as Event Guest in this event form. This will list the event guests and, if applicable, which event items (products) they are matched to:

TAG	DESCRIPTION
%EVENTGUESTDETAILS%	Event guest detail

Confirmation Email

The confirmation email is fully customizable. It is important to remember that HTML code will be displayed as raw code to Text Only email recipients.

How to edit the Confirmation Email:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Confirmation Email** tab at the top of the page. See

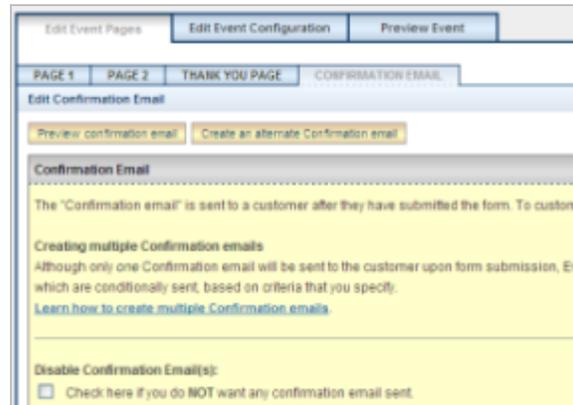
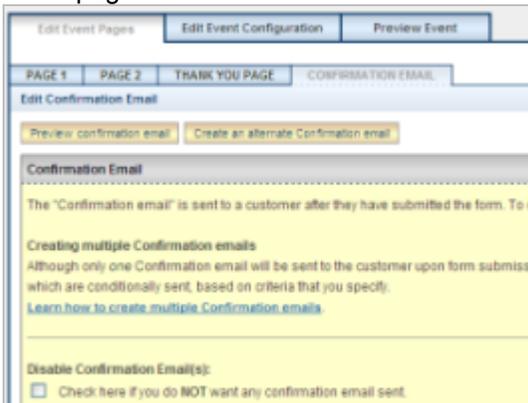


Figure 102

Customize the Email Sender & Subject:

"From" Email Address:

Email Subject:

Figure 103

7. *Figure 102*. The **Confirmation Email** will display in edit mode.
8. Enter the **"From" Email Address**. See *Figure 103*.
9. Modify the Email Subject. It is good to include the Event Title in the subject.
10. Modify content in the text area provided. See *Figure 104*.
11. Enter blind carbon copy email addresses. One email address per line. See *Figure 105*.
12. Click **Save Changes**, or **Cancel** to abort.

Enter text and/or HTML:

```

Date: %ORDERDATE%<br><br>
TO: %FIRSTNAME% %LASTNAME%<br>
%STREET1% %STREET2%<br>
%CITY%, %STATE% %COUNTRY% %ZIP%<br>
<br>
Dear %FIRSTNAME% %LASTNAME% <br><br>
Thank you for your credit card gift! Your credit card has been charged.<br><br>
We recommend that you print this page for your records.<br><br>
Gift Amount: %AMOUNT%<br><br>
Charge Confirmation Number: %REFERENCENUMBER%<br><br>
The Date/Time of your credit card charge was: %ORDERDATETIME%<br><br>
    
```

Figure 104

Blind Copy Option:

To send "blind" copies of confirmation emails (bcc:) to other email addresses, type each email address on a separate line.

bcc: Email Addresses:

Save Changes Cancel

Figure 105

How to preview the Confirmation Email:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Confirmation Email** tab at the top of the page.
7. Click the **Preview confirmation email** button at the top of the page. See *Figure 106*.

Figure 106

Disable Confirmation Email

The confirmation email feature can be disabled. Disabling this feature will prevent all confirmation emails from being deployed including blind carbon copies as well confirmation emails sent when modifying a registration on the registrant's behalf. This is not recommended. If you do not wish for specific registrants to receive a confirmation email, register on their behalf and enter your email address in place of the registrants. **IMPORTANT! The email address must be a valid email address for any confirmation emails to be deployed.**

How to disable confirmation email:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event

Disable Confirmation Email(s):

Check here if you do NOT want any confirmation email sent.

Figure 107

- Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Confirmation Email** tab at the top of the page. The **Confirmation Email** will display in edit mode.
7. Check the **Disable Confirmation Email** checkbox. *See Figure 107.*
8. Click **Save Changes**, or **Cancel** to abort.

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 additional payment options such as Check, Money Order, or pay at the door, the Thank-you page and Confirmation email can be different based on the selected payment option.

How to create multiple/conditional Thank You page/Confirmation Emails:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Thank You Page or Confirmation Email** tab at the top of the page. The **Thank You Page/Confirmation Email** will display.
7. Click on the **Create an alternate Thank-you page/Confirmation email** button. *See Figure 108.*
8. The **Create a new thank you page/confirmation email** will display.
9. Click the **Create a new thank you page/confirmation email** button to confirm that you want to create the page. *See Figure 109.* A **“Your new thank you/confirmation email page has been created”** onscreen confirmation will display.

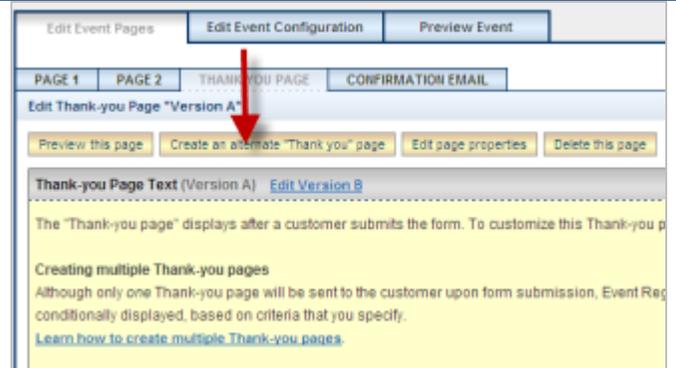


Figure 108

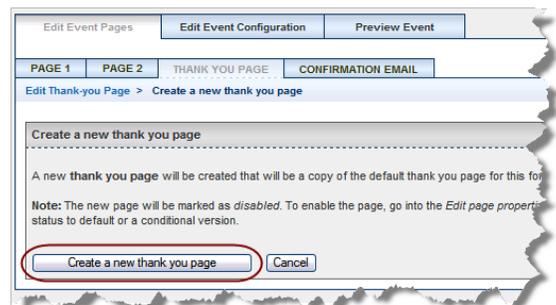


Figure 109

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/Confirmation emails will be referred to as Version B, Version C, etc.

1. Click on the appropriate **Edit Version** link to edit the new Thank-you page/Confirmation Email. See *Figure 110*..
2. Edit the Thank-you page/Confirmation Page text as necessary and save your changes.
3. Click on the "**Edit page/email properties**" button. See *Figure 111*.
4. Select the option for **This Thank-you page/Confirmation email will only display when a user selects the 'Conditional Trigger' specified below** radio button. See *Figure 112*.

IMPORTANT!
The new confirmation email will be marked as *disabled*.

5. Select the components or component-options which, when selected by the end user, will cause this page to be displayed.
6. Click **Save Changes**, or **Cancel** to abort.

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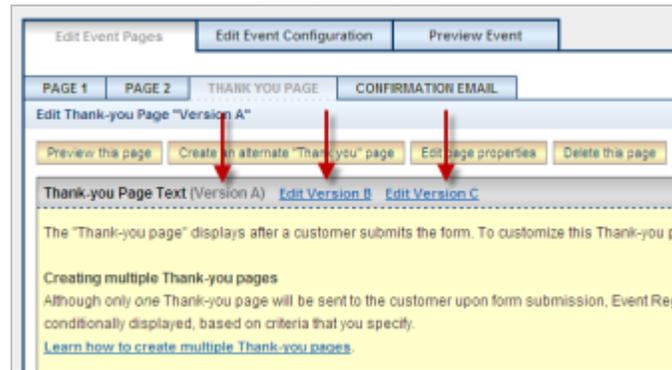


Figure 110

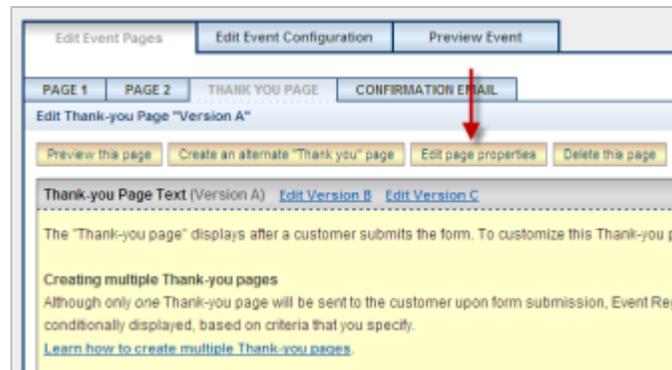


Figure 111

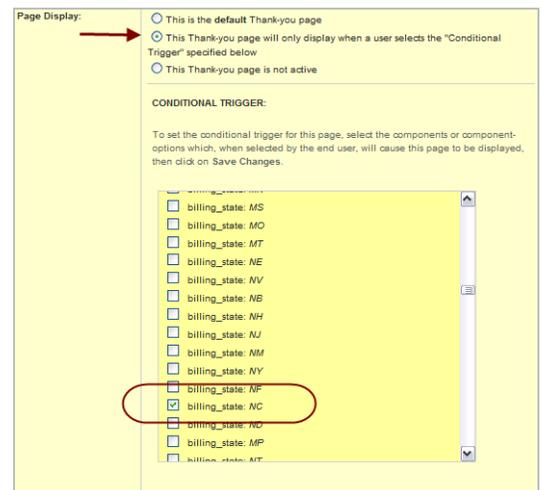


Figure 112

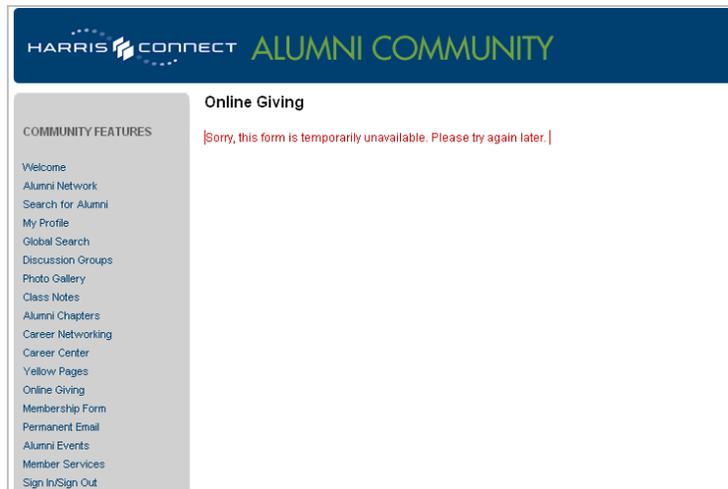
How to set the default Thank You page/Confirmation Email:

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**.
4. Click Save Changes.

Edit Event Configuration

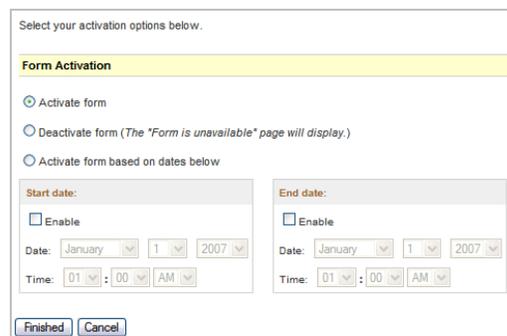
Activation

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 **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Activation** link next to the appropriate form. The Activation page displays. *See Figure 113.*
6. Select **Activate form**, **Deactivate form**, or **Activate form based on dates below**.
7. If entering a date range of when the form is accessible, check the **Enable** checkbox.
8. Click **Finish**, or **Cancel** to abort.



The screenshot shows the 'Form Activation' configuration page. It has a title 'Select your activation options below.' and a section header 'Form Activation'. There are three radio button options: 'Activate form' (selected), 'Deactivate form (The "Form is unavailable" page will display.)', and 'Activate form based on dates below'. Below these are two date/time selection boxes, 'Start date' and 'End date', each with an 'Enable' checkbox. The date is set to January 1, 2007, and the time is 01:00 AM. At the bottom are 'Finished' and 'Cancel' buttons.

Figure 113

Payment Processing

Configure Payment Processing

How to setup payment processing:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Payment Processing** link next to the appropriate form. The payment processing options will display. See *Figure 114*.

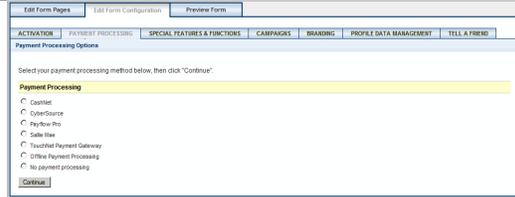


Figure 114

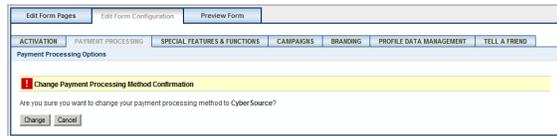


Figure 115

Note: If the *Payment Processing* has already been configured the full *Payment Processing* page will display. See *Figure 116*.

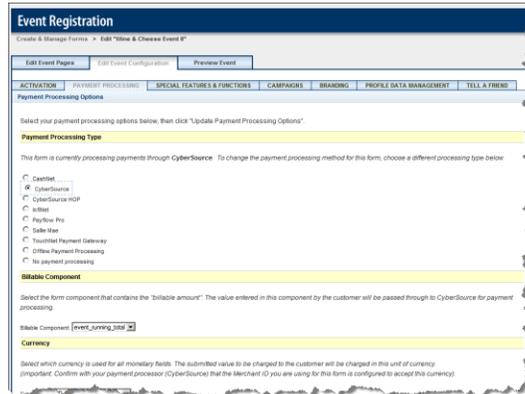


Figure 116

1. Select **Payment Processing Type** (CyberSource, TouchNet, etc., or Offline Payment Processing).
2. Click **Continue**. An “Are you sure” page will display. See *Figure 115*.
3. Click **Change**. The full payment-processing page will display. See *Figure 116*.

IMPORTANT!
Administrators have the ability to set an event as Offline Payment Processing.

Billable Component

The billable component is the total dollar amount forwarded to the payment gateway for credit card processing.

Billable Component:

Currency

Foreign currency is available. The Event Registration application currently supports: Canadian Dollar, British Pound Sterling, Euro, and Mexican Peso.

IMPORTANT!
 Confirm with your payment processor (CyberSource) that the Merchant ID you are using for this form is configured to accept foreign currency.

Currency:

Recurring Payments

Recurring Payments section will appear **ONLY** if the Merchant ID has been appropriately configured. To accept Recurring Payments for an event, choose the radio button: Recurring payments accepted. By default, recurring payments are not accepted. For complete instructions for mapping this section, click on the link [How to add "Recurring Payments" as a payment option on a form](#) within the Recurring Payments section.

Recurring Payments

[How to add "Recurring Payments" as a payment option on a form](#)

Select whether or not you would like recurring payments to be accepted on this form.

Recurring payments not accepted.
 Recurring payments accepted.

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 to accept Recurring Payments on this form). 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):
 Automatic renewal option (optional):

Credit Cards

Administrators select the credit cards to be used for this event form.

IMPORTANT!
 Confirm with your payment processor (CyberSource) that the Merchant ID you are using for this form is configured to accept the selected credit card types.

How to add credit card types:

1. Select the credit card types from the **Unaccepted Cards** list. See *Figure 117*.
2. Click the **Add** button to add the selected credit card types to the **Accepted Cards** list.



Figure 117

Display Order

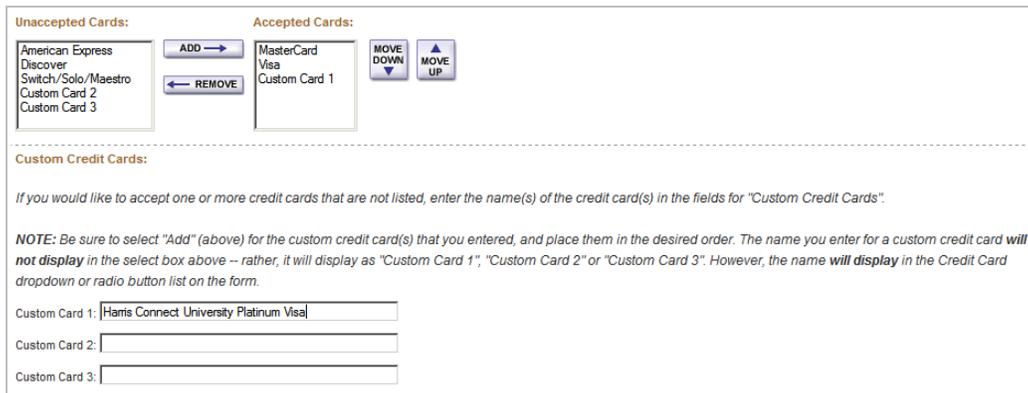
Use the "Move Up" and "Move Down" buttons to change the order in which the credit cards will display on the form.

How to add credit card types:

1. Select the credit card types from the **Accepted Cards** list.
2. Click the **Remove** button to remove the selected credit card types from the **Accepted Cards** list.

Custom Credit Cards

Administrators can add custom institution/association credit cards to event forms. For example: We could add the Harris Connect University Platinum Visa credit card as an option.



Unaccepted Cards: American Express, Discover, Switch/Solo/Maestro, Custom Card 1, Custom Card 2, Custom Card 3

Accepted Cards: MasterCard, Visa, Custom Card 1

Custom Credit Cards:

If you would like to accept one or more credit cards that are not listed, enter the name(s) of the credit card(s) in the fields for "Custom Credit Cards".

NOTE: Be sure to select "Add" (above) for the custom credit card(s) that you entered, and place them in the desired order. The name you enter for a custom credit card **will not display** in the select box above -- rather, it will display as "Custom Card 1", "Custom Card 2" or "Custom Card 3". However, the name **will display** in the Credit Card dropdown or radio button list on the form.

Custom Card 1:

Custom Card 2:

Custom Card 3:

How to add credit card types:

1. Select **Custom Card** type from the **Unaccepted Cards** list.
2. Click the **Add** button to add the selected custom credit card to the **Accepted Cards** list.
3. Enter the credit card name you wish to display in the Credit Card type dropdown or next to the Credit Card type radio button.

Credit Card Components

Credit card types can display as a dropdown menu (default component) or as a radio button selection.

Credit Card component type:

You also have the option to display credit cards (on the form) in a dropdown menu or in a radio button list. Make your selection below.

Display credit cards in a dropdown

Display credit cards in a radio button list

Merchant ID

Select the Merchant ID to be used for credit card payments.

Merchant ID

Select the merchant ID that will be used for this form:

Merchant ID:

If Merchant ID Already Selected – The selected merchant ID will display in the Current Merchant ID field. The admin must click the Modify link in order to modify the selected merchant ID.

Merchant ID

A Merchant ID is used to [short explanation]. Select the merchant ID that will be used for this form.

Current merchant ID: [Modify](#)

No Access To Selected Merchant ID – If the admin does not have access to the assigned Merchant ID, the merchant ID characters are hidden with asterisks.

Merchant ID

A Merchant ID is used to [short explanation]. Select the merchant ID that will be used for this form.

Current merchant ID: [Modify](#)

When the admin clicks the Modify link, he/she will receive an important note. Clicking the “Continue and modify Merchant ID” link will allow the admin to continue. The Available Merchant ID dropdown menu will display.

Merchant ID

A Merchant ID is used to [short explanation]. Select the merchant ID that will be used for this form.

Current merchant ID: [Modify](#)

Important: You do not have access to the merchant ID to which this form is currently set. If you set the form to use a different merchant ID, you will not be able to set it back to the one being used currently.

[Cancel](#) [Continue and modify Merchant ID](#)

Merchant ID Error Handling – If an admin is attempting to change the Merchant ID for a live form meaning the form is Active and hitting the Production payment processing server, displays the following error message:

Important: You are about to modify the merchant ID for an active form currently connected to the production payment processing server. If you clicked modify by mistake, please click cancel.

[Cancel](#) [Continue and modify Merchant ID](#)

No Merchant ID Error Handling – When an admin does not have access to any Merchant IDs is attempting to configure a new form, the following error message displays.

Merchant ID

A Merchant ID is a unique identifier assigned by merchant account providers for subscriptions and/or membership renewals.

Current merchant ID: [Modify](#)

Sorry, but you do not have access to any merchant IDs.

[Close](#)

Processing Server

The Processing Server should be set to TEST credit card processing while you are creating, editing, and test your event. Prior to activating your event for end-users, be sure to set the Processing Server to PRODUCTION.

Processing Server

The information collected in this form will be sent to and processed on a credit card services server. Select the server you would like to use:

- Send form information to the **TEST** credit card processing server only
(Select this option while you are creating, editing and testing your form.)

- Send form information to the **PRODUCTION** credit card processing server
(Select this option when you are ready to process live credit card transactions.)

Additional Payment Options

Administrators can specify which additional payment options (cash, invoice, pay at door, check, or money order) are available to the registrant and which ones are only available to the administrator.

Additional Payment Options		
Select any additional payment options that will be offered on this form. You may specify that a payment option is only available for administrators by only checking the "Available for Administrators" checkbox for that option.		
Payment Option	Available for	
	Customer	Administrators
Cash	<input type="checkbox"/>	<input type="checkbox"/>
Invoice	<input type="checkbox"/>	<input type="checkbox"/>
Pay At Door	<input type="checkbox"/>	<input type="checkbox"/>
Check*	<input type="checkbox"/>	<input type="checkbox"/>
Money Order*	<input type="checkbox"/>	<input type="checkbox"/>

IMPORTANT!

If Check or Money Order is selected, enter a mailing address where registrants can mail in their checks and money orders to. The Mailing Address will display on the Thank You page and Confirmation Email.

Custom Data for Payment Processor*

**Currently, this feature is available only for CyberSource. Check with your CRM for additional payment processor availability.*

Administrators have the ability to send an additional value to CyberSource with all form submissions. This will simplify the order reconciliation process. The following types of values may be sent to CyberSource:

- Fixed values (such as appeal codes, scholarship designations)
- Form data entered by the user
- Profile data for authenticated users

The custom value will be appended to the Merchant Reference Number that currently appears in Harris Form Reporting as well as most reports within the CyberSource Business Center. While this functionality is currently only available for CyberSource, support for other payment processors is anticipated in the future.

Custom Data for Payment Processor	
Select the type of custom data you would like to send to the payment processor.	
More	
<input checked="" type="radio"/>	None
<input type="radio"/>	Fixed value: <input type="text"/>
<input type="radio"/>	Form data: <input type="text" value="- Select -"/>
<input type="radio"/>	Profile data: <input type="text" value="- Select -"/>
Note: Profile data will only be passed if customer is logged in at the time of form submission.	
<input type="button" value="Finished"/>	

Edit Payment Processing

How to edit Payment Processing Options:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Payment Processing** link next to the appropriate form. The Payment Processing page will display. Select **Payment Processing Type** (CyberSource, TouchNet, etc.).
6. Select **Billable Component** to be passed through to CyberSource.
7. Select whether or not you would like **recurring payments** to be accepted on this form.



The screenshot shows a web application interface with a navigation bar containing 'Edit Form Pages', 'Edit Form Configuration', and 'Preview Form'. Below the navigation bar, there are two tabs: 'PAYMENT PROCESSING OPTIONS' (selected) and 'PAGE BRANDING'. The main content area displays a confirmation dialog titled 'Change Payment Processing Options Confirmation'. The dialog text reads: 'Please confirm the following settings:'. Below this, the following settings are listed: 'Payment Processor: CyberSource', 'Billable Component: gift_amount_1', 'Credit Cards: MasterCard, Visa', 'Merchant ID: Harris_Connect', and 'Processing Server: TEST'. At the bottom of the dialog, there are two buttons: 'Change' and 'Cancel'.

Figure 118

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.

8. Select accepted **Credit Card** types.
9. Enter Labels to display for **Custom Cards**, if applicable.
10. Select **Credit Card Component** (radio buttons or dropdown menu). Dropdown menu is the default.
11. Select the **Merchant ID**.
12. Select the appropriate **Processing Server** (Test or Production).
13. Select any **Additional Payment Options**.
14. Include any **Custom Data for Payment Processor**.
15. Click the **Finished** button. The **Change Payment Processing Options Confirmation** page will display. See *Figure 118*.
16. Click **Change**.

Special Features & Functions

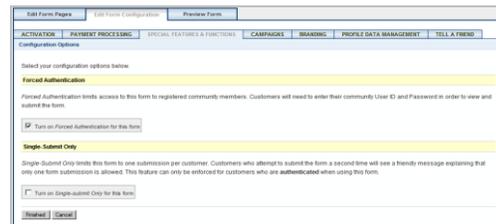
Special features & functions allows administrators to set additional configure options such as Force Authentication, Single-Submit Only, Attendance List, Wait List, and Matching Guests.

Forced Authentication

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 **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit Form Configuration** tab at the top of the page. The Payment Processing page will display by default.
7. Click the **Special Features & Functions** tab. The Special Features & Functions page will display.
8. Check the **Turn on Forced Authentication for this form** checkbox. See *Figure 119*.
9. Click **Finished**, or **Cancel** to abort. The page will refresh and the **Update successful** confirmation will display at the top of the page.



The screenshot shows a web interface for editing form configurations. At the top, there are tabs for 'Edit Form Pages', 'Edit Form Configuration', and 'Preview Form'. Below these are navigation tabs: 'ACTIVATION', 'PAYMENT PROCESSING', 'SPECIAL FEATURES & FUNCTIONS', 'CAMPAIGN', 'BRANDING', 'PROFILE DATA MANAGEMENT', and 'TOLL & FEE'. The 'SPECIAL FEATURES & FUNCTIONS' tab is active. Underneath, there's a section for 'Configuration Options' with a heading 'Select your configuration options below'. Two options are visible: 'Forced Authentication' with a checked checkbox and 'Single-Submit Only' with an unchecked checkbox. Each option has a brief description of its function. At the bottom, there are 'Finished' and 'Cancel' buttons.

Figure 119

IMPORTANT!

Users will be prompted to login prior to accessing the event registration.



Superior client service
Strategic consulting
one-on-one training
and on demand

REQUEST MORE INFO
Click here for more information
or to request a demo of Harris
Connect services. **GO**

Community Resources

- ▶ Welcome
- ▶ My Network
- ▶ Alumni Directory
- ▶ Get Involved
- ▶ Events & Photos
- ▶ Career Services
- ▶ Member Services

Sign In

Please enter your User ID and Password to access members-only features.

Sign In

Sign in to access members-only areas of the community.

User ID:

Password:

[Forgot](#) your user ID or password?

Not yet registered for the community?
Take advantage of all the community has to offer! Click here to [register now!](#)

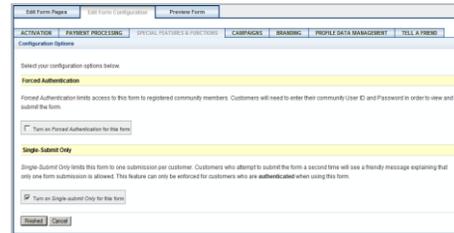
***Please note:** You must be using a "cookie enabled" browser in order to access the members-only areas. If you have disabled cookie use in your browser, you must enable it before entering your authentication info.*

Single-Submit Only

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 **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit Form Configuration** tab at the top of the page. The Payment Processing page will display by default.
7. Click the **Special Features & Functions** tab. The Special Features & Functions page will display.
8. Check the **Turn on Single-submit Only for this form** checkbox. See *Figure 120*.
9. Click **Finished**, or **Cancel** to abort. The page will refresh and the **Update successful** confirmation will display at the top of the page.



The screenshot shows a web interface for editing form configurations. At the top, there are tabs for 'Edit Form Pages', 'Edit Form Configuration', and 'Preview Form'. Below these are navigation tabs: 'ACTIVATION', 'PAYMENT PROCESSING', 'SPECIAL FEATURES & FUNCTIONS', 'CAMPAIGNS', 'MAILING', 'PROFILE DATA MANAGEMENT', and 'TELL A FRIEND'. The 'SPECIAL FEATURES & FUNCTIONS' tab is active. The main content area is titled 'Configuration Details' and contains two sections: 'Personal Authentication' and 'Single-Submit Only'. The 'Single-Submit Only' section has a checkbox that is checked, with the label 'Turn on Single-submit Only for this form'.

Figure 120

IMPORTANT!

Users who attempt to submit the form a second time will see a friendly message explaining that only one form submission is allowed.

Order Discount

The Order Discount feature allows an administrator to apply a discount to an order or event registration. The discount can be applied while submitting the form on behalf of an end user through the "User Order Entry" tool or when modifying an existing event registration.

How to activate the Order Discount feature:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit Form Configuration** tab (or **Edit Event Configuration** if in the **Event Registration** application) at the top of the page. The Payment Processing page will display by default.
7. Click the **Special Features & Functions** tab. The Special Features & Functions page will display.
8. Check the **Turn on Order Discount for this form** checkbox. See *Figure 121*.
9. Click **Finished**, or **Cancel** to abort. The page will refresh and the **Update successful** confirmation will display at the top of the page.

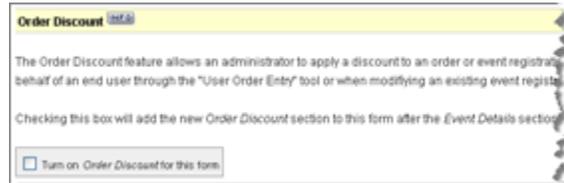


Figure 121

Note: When the **Turn on Order Discount for this form** checkbox is checked for the very first time, an **ADMIN-ONLY** section named "Order Discount" is added to the form directly after the section that contains the "Billable Component". Once this section exists, it may not be deleted, but it may be *hidden* by unchecking the **Turn on Order Discount for this form** checkbox when or if it is no longer needed. From that point on, checking and unchecking that checkbox will simply hide or show the section.

The Order Discount section:

By default, the Order Discount section contains 6 components - See *Figure 122*.

- **Order Discount Header** - This is a normal header component, and may be edited.
- **Order Total Before Discount** - This is a display field that reflects the total order cost before the discount amount is applied so this value may not be edited on the rendered form. This component may NOT be edited or deleted within the form setup.
- **Discount Method** - This is a dropdown menu that allows the administrator submitting the form to select the type of discount to be applied -- a flat amount or a percentage. This component may NOT be edited or deleted within the form setup.
- **Discount Amount** - This is an input field where the administrator submitting the form may enter the dollar amount or percentage that represents the discount. This component may NOT be edited or deleted within the form setup.
- **Applied Discount** - This is a display field that reflects the calculated discount amount in dollars based on the entered Discount Method and Discount Amount so this value may not be edited on the rendered form. This component may NOT be edited or deleted within the form setup.



ORDER	Label for display	Identifier	Type	Availability	Visibility	User Responses	Placement	ACTIONS
1	Order Discount Header	order_discount_header	HEADER	On	On	On	Top	Edit Delete
2	Order Total Before Discount	order_total_before_discount	DISPLAY	On	On	On	Top	Edit Delete
3	Discount Method	discount_method	DROPDOWN	On	On	On	Top	Edit Delete
4	Discount Amount	discount_amount	INPUT	On	On	On	Top	Edit Delete
5	Applied Discount	discount_applied	DISPLAY	On	On	On	Top	Edit Delete
6	Order Total After Discount	order_total_after_discount	DISPLAY	On	On	On	Top	Edit Delete

Figure 122

IMPORTANT!
 The *Order Discount* section may be moved, but it *must remain on the same page as the billable component*. Additionally, if no billable component is defined on the form, the Order Discount feature will not be available. If the billable component gets deleted or "undefined" after an Order Discount section has been created, an error message will be displayed on the Preview Event tab indicating that a Billable Component must be configured in order for the form to be processed properly

- **Order Total After Discount** - This is a display field that reflects the total order cost after the discount amount is applied so this value may not be modified on the rendered form. This component may NOT be edited or deleted within the form setup.

How to apply an Order Discount:

Once the Order Discount feature has been activated, the Order Discount section will appear in the admin version of the form (from within the User Order Entry application or when using the “Admin Preview” within Event Registration) - See *Figure 123*

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Register User For an Event**.
4. The **User Order Entry** application will appear.
5. Select the appropriate form and then select/locate the appropriate user to submit the form for. The “Admin View” version of the form will display.
6. Enter all the required form information.
7. Select the appropriate **Discount Method** from the drop down based on the type of discount you’d like to apply. The options are either “Flat Amount” or “Percent”.
8. Enter the appropriate **Discount Amount** value. The **Applied Discount** and **Order Total After Discount** fields will be recalculated automatically to reflect the discount amount. If an order Total component is included on the form, it will also be recalculated to reflect the discount.
9. Click **Submit** to submit the order. The Billed Amount indicated on the Thank You page will reflect the applied discount.

Order Discount	
Order Total Before Discount	\$ 250.00
Discount Method	Percent <input type="button" value="v"/>
Discount Amount	10.00
Applied Discount	\$ 25.00
Order Total After Discount	\$ 225.00

Figure 123

Note: An administrator may apply an order discount to a new form submission or an order modification, but once a discount has been applied, the community user may not modify it – instead, the user will be instructed to contact their administrator to make modifications to their order.

Attendance List

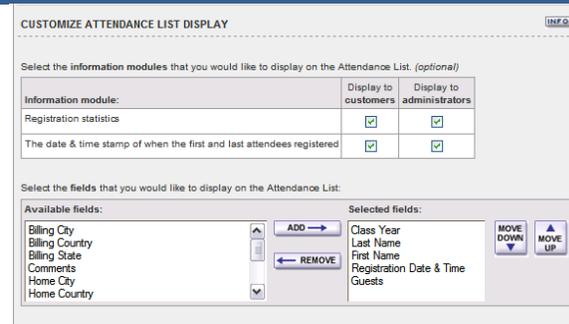
Attendance List is used to show a list of confirmed attendees on your event registration page. A [View Attendance List](#) link will display under the event description. When users click the link, they will see a popup window that displays all the attendees that have registered for the event. The Attendance List is active by default on all events.

Event Attendance					
Attendance list View attendance summary Add an attendee					
Class Year	Last Name	First Name	Registration Date & Time	Guests	
1999	Slosson	Eric	Feb 16 2010 12:11PM	Roland Nave	View attendee details
1998	Nave	Roland	Feb 16 2010 12:13PM	Slossy Sloss, Class of 1999	View attendee details
	Spivey	Natasha	Feb 16 2010 12:14PM	Denzel Washington	View attendee details
2002	Brashares	Matt	Feb 16 2010 12:15PM		View attendee details
1998	White	Adia	Feb 16 2010 12:18PM		View attendee details
	Nugent	Julie	Feb 16 2010 12:19PM		View attendee details
1993	Henderson	Michele	Feb 16 2010 12:26PM		View attendee details
	Whipple	Brett	Feb 16 2010 12:53PM		View attendee details
1988	Avery	Hardeep	Feb 16 2010 1:47PM	Tim Avery	View attendee details
2002	Branner	Amanda	Feb 16 2010 4:30PM		View attendee details
	Wiener	Marc	Feb 17 2010 9:07AM		View attendee details
1992	Love	Chris	Feb 17 2010 10:17AM		View attendee details
2003	Mesquita	Caryne	Feb 17 2010 11:57AM	Clive Owen	View attendee details
1990	Stewart-Kelley	Susan	Feb 17 2010 4:03PM	Steve Kelley	View attendee details
1994	Spivey	Natasha	Feb 18 2010 11:41AM	Morgan Taylor Jackson Brown	View attendee details

Customize Attendance List

How to customize the attendance list:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit Event Configuration** tab at the top of the page. The Payment Processing page will display by default.
7. Click the **Special Features & Functions** tab. The Special Features & Functions page will display.
8. Scroll down to the **Attendance List** section. *See Figure 124.*
9. Uncheck the appropriate checkbox if you do not wish to display the **Registration Statistics** and **Date & time stamp of when the first and last attendees registered** for the customer or administrator.
10. Add additional fields from the Available fields list, by highlighting the field and clicking the Add button. The newly added field will appear in the Selected fields list.
11. Click **Finished**. The Special Features and Function page will refresh.



CUSTOMIZE ATTENDANCE LIST DISPLAY (INF. G)

Select the information modules that you would like to display on the Attendance List. (optional)

Information module:	Display to customers	Display to administrators
Registration statistics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
The date & time stamp of when the first and last attendees registered	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Select the fields that you would like to display on the Attendance List:

Available fields:	Selected fields:
Billing City	Class Year
Billing Country	Last Name
Billing State	First Name
Comments	Registration Date & Time
Home City	Guests
Home Country	

Buttons: ADD, REMOVE, MOVE DOWN, MOVE UP

Figure 124

Re-order Selected Fields

1. Select the appropriate Selected field
2. Use the Move Down and Move Up button to re-order.

Remove Selected Fields

1. Select the appropriate Selected field
2. Use the Remove button to remove the field. The field will return to the Available field list.

View Attendance List (Admin View)

How to view the attendance list:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit Event Configuration** tab at the top of the page. The Payment Processing page will display by default.
7. Click the **Special Features & Functions** tab. The Special Features & Functions page will display.
8. Click the **View current attendance list** link. See *Figure 125*. The current attendance list will display. See *Figure 126*.

Figure 125

Class Year	Last Name	First Name	Registration Date & Time	Guests	
1999	Slosson	Eric	Feb 16 2010 12:11PM	Roland Nave	View attendee details
1998	Nave	Roland	Feb 16 2010 12:11PM	Slozy Sloss, Class of 1999	View attendee details
	Spivey	Natasha	Feb 16 2010 12:14PM	Denzel Washington	View attendee details
2002	Brashares	Matt	Feb 16 2010 12:15PM		View attendee details
1998	White	Adia	Feb 16 2010 12:18PM		View attendee details
	Nugent	Julie	Feb 16 2010 12:19PM		View attendee details
1993	Henderson	Michele	Feb 16 2010 12:26PM		View attendee details
	Whipple	Brett	Feb 16 2010 12:53PM		View attendee details
1988	Avery	Hardeep	Feb 16 2010 1:47PM	Tim Avery	View attendee details
2002	Branner	Amanda	Feb 16 2010 4:30PM		View attendee details
	Wiener	Marc	Feb 17 2010 9:07AM		View attendee details
1992	Love	Chris	Feb 17 2010 10:17AM		View attendee details
2003	Mesquita	Caryne	Feb 17 2010 11:57AM	Clive Owen	View attendee details
1990	Stewart-Kelley	Susan	Feb 17 2010 4:03PM	Steve Kelley	View attendee details
1994	Spivey	Natasha	Feb 18 2010 11:41AM	Morgan Taylor Jackson Brown	View attendee details

Figure 126

Add Attendee to Attendance List

Administrators may need to add offline registrants to the attendance list.

How to add an attendee to the attendance list:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit Event Configuration** tab at the top of the page. The Payment Processing page will display by default.
7. Click the **Special Features & Functions** tab. The Special Features & Functions page will display.
8. Click the **View current attendance list** link. The current attendance list will display.
9. Click the **Add a new attendee** link. See *Figure 127*. The Attendee details page will display. See *Figure 128*.
10. Complete the form.

Figure 127

Figure 128

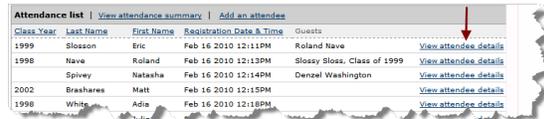
- Click **Save**, or **Cancel** to abort. The Event Attendance page will refresh with the newly added attendee details displayed.

IMPORTANT!
Adding an attendee to the Attendance List does NOT automatically register them for the event.

Modify Attendee Detail on the Attendance List

How to modify an attendee's details in the attendance list:

- Log into the **Administration Center**.
- Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
- Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
- Scroll down to the **Manage Events** section.
- Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
- Click the **Edit Event Configuration** tab at the top of the page. The Payment Processing page will display by default.
- Click the **Special Features & Functions** tab. The Special Features & Functions page will display.
- Click the **View current attendance** list link. The current attendance list will display.
- Click the **View attendee details** link next to the appropriate attendee's name. See *Figure 129*. The Attendee details page will display. See *Figure 130*.
- Click the **Modify attendee details** link. The Attendee Details page will display in edit mode. See *Figure 131*.
- Make the appropriate modifications.
- Click **Save**, or **Cancel** to abort. The Event Attendance page will refresh with the modified information displayed.



Class Year	Last Name	First Name	Registration Date & Time	Guests	
1999	Slosson	Eric	Feb 16 2010 12:11PM	Roland Nave	View attendee details
1998	Nave	Roland	Feb 16 2010 12:13PM	Slossy Sloss, Class of 1999	View attendee details
	Spivey	Natasha	Feb 16 2010 12:14PM	Denzel Washington	View attendee details
2002	Brashares	Matt	Feb 16 2010 12:15PM		View attendee details
1998	White	Adia	Feb 16 2010 12:18PM		View attendee details

Figure 129



Attendee Details

Privacy settings:

Display my name publicly in the attendee list for this event.

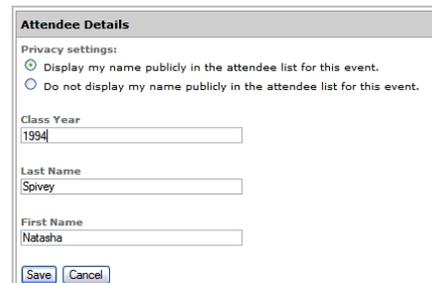
Do not display my name publicly in the attendee list for this event.

Class Year

Last Name

First Name

Figure 130



Attendee Details

Privacy settings:

Display my name publicly in the attendee list for this event.

Do not display my name publicly in the attendee list for this event.

Class Year

Last Name

First Name

Figure 131

Remove an Attendee from the Attendance List

How to remove an attendee from the attendance list:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit Event Configuration** tab at the top of the page. The Payment Processing page will display by default.
7. Click the **Special Features & Functions** tab. The Special Features & Functions page will display.
8. Click the **View current attendance** list link. The current attendance list will display.
9. Click the **View attendee details** link next to the appropriate attendee's name. The Attendee details page will display.
10. Click the **Remove from attendee list** link. See *Figure 132*. The Attendance List will display without the removed attendee listed.

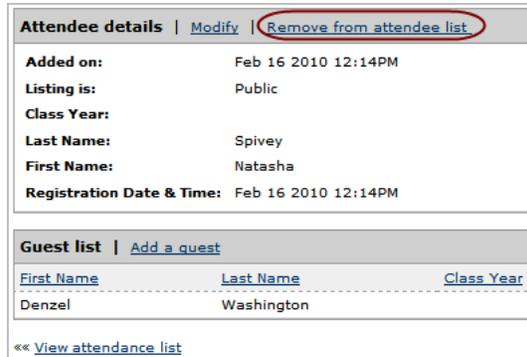


Figure 132

IMPORTANT!
Attendee's who registrations have been cancelled will automatically be removed from the Attendance List.

Add a Guest to the Attendance List

How to add a guest to the attendance list:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit Event Configuration** tab at the top of the page. The Payment Processing page will display by default.
7. Click the **Special Features & Functions** tab. The Special Features & Functions page will display.
8. Click the **View current attendance** list link. The current attendance list will display.
9. Click the **View attendee details** link next to the appropriate attendee's name. The Attendee details page will display.
10. Click the **Add a guest** link. See *Figure 133*.



Figure 133



The screenshot shows the 'Guest Details' form. It has a 'Privacy settings' section with two radio buttons: 'Display this guest's name publicly in the attendee list for this event.' (selected) and 'Do not display this guest's name publicly in the attendee list for this event.' Below this are three input fields: 'First Name', 'Last Name', and 'Class Year'. At the bottom, there are 'Save' and 'Cancel' buttons.

Figure 134

IMPORTANT!

The Attendance List will display without the removed attendee.

Adding a guest to the Attendance List does NOT automatically register them for the event.

11. Complete the form. See *Figure 134*.
12. Click **Save changes**, or Cancel to abort. The Event Attendance page will refresh with the newly added attendee details displayed.

Deactivate Attendance List

How to deactivate the attendance list:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit Event Configuration** tab at the top of the page. The Payment Processing page will display by default.
7. Click the **Special Features & Functions** tab. The Special Features & Functions page will display.
8. Uncheck the **Turn on Attendance List view for this event** checkbox. See *Figure 135*.
9. Click **Finished**, or Cancel to abort. The page will refresh and the **Update successful** confirmation will display at the top of the page.

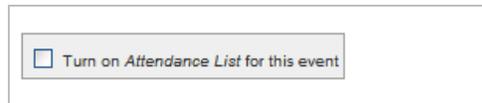


Figure 135

Note: The Attendance List can also be flagged as "hidden" under Edit Event Pages.

Attendance List Trigger

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 **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit Event Configuration** tab at the top of the page. The Payment Processing page will display by default.
7. Click the **Special Features & Functions** tab. The Special Features & Functions page will display.



Figure 136

8. Check the **"Only show the link to the attendance list when there is a minimum of X attendees"** checkbox and enter the number of minimum attendees. See *Figure 136*.
9. 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

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.

Activate Waiting List

How to activate the Waiting List:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit Event Configuration** tab at the top of the page. The Payment Processing page will display by default.
7. Click the **Special Features & Functions** tab. The Special Features & Functions page will display.
8. Check the **Turn on *Waiting List* for this event** checkbox. The page will refresh. See *Figure 136*.
9. 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.
10. Click **Finished**, or **Cancel** to abort. The page will refresh and the **Update successful** confirmation will display at the top of the page.

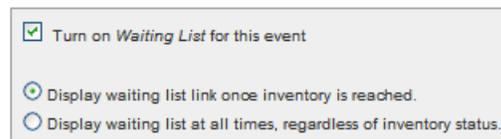


Figure 137

Deactivate Waiting List

How to deactivate Wait List:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit Event Configuration** tab at the top of the page. The Payment Processing page will display by default.
7. Uncheck the **Turn on *Waiting List* for this event** checkbox. See *Figure 138*.
8. Click **Finished**, or **Cancel** to abort. The page will refresh and the **Update successful** confirmation will display at the top of the page.

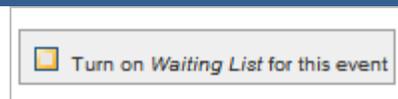


Figure 138

Add Potential Attendee to the Waiting List

How to add a potential attendee to the waiting list:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit Event Configuration** tab at the top of the page. The Payment Processing page will display by default.
7. Click the **Special Features & Functions** tab. The Special Features & Functions page will display.
8. Click the **View current waiting list** link. The Waiting List Summary page will display. Click the **Add a new waiting list entry** link. See Figure 140.
9. The Modify waiting list entry page will display. See Figure 140.

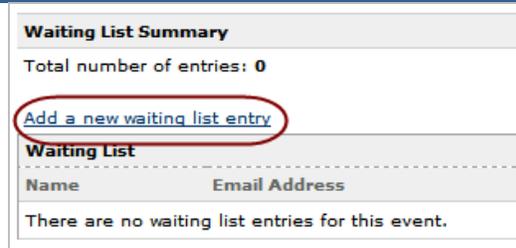


Figure 139

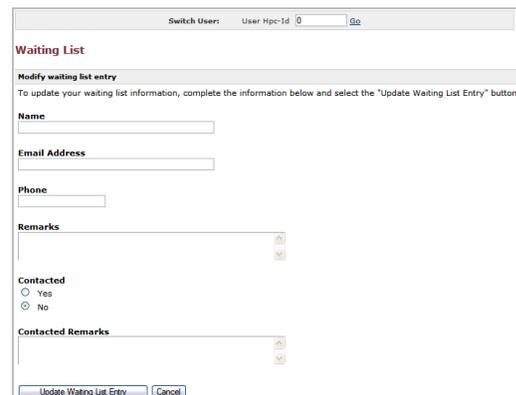


Figure 140

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

10. Complete the form.
11. Click **Update Waiting List Entry**, or Cancel to abort. The Waiting List will display with the newly added entry listed.

12. **Switch User** section at top of page enables an administrator to quickly add a member using the members HPC_ID.

Remove Potential Attendee from the Waiting List

How to remove a potential attendee from the waiting list:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit Event Configuration** tab at the top of the page. The Payment Processing page will display by default.
7. Click the **Special Features & Functions** tab. The Special Features & Functions page will display.

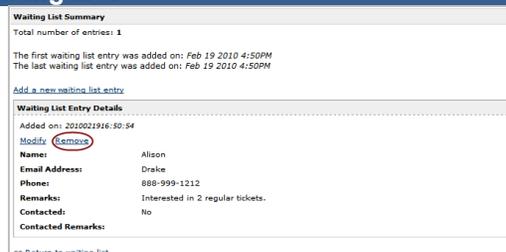


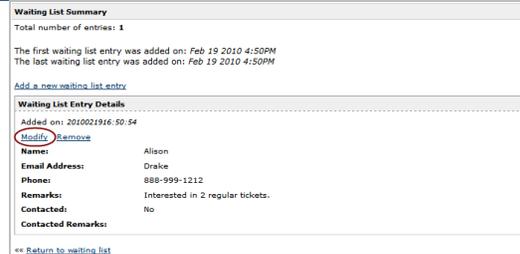
Figure 141

8. Click the **View current waiting list** link. The Modify waiting list entry page will display.
9. Click the **View entry details** link to the appropriate entry's name. The Waiting List Entry Details page will display.
10. Click the **Remove** link. See *Figure 141*. The Waiting List page will display with the removed entry not displaying.

Modify Potential Attendee on the Waiting List

How to modify a waiting list entry:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit Event Configuration** tab at the top of the page. The Payment Processing page will display by default.
7. Click the **Special Features & Functions** tab. The Special Features & Functions page will display.
8. Click the **View current waiting list** link. The Modify waiting list entry page will display.
9. Click the **View entry details** link to the appropriate entry's name. The Waiting List Entry Details page will display.
10. Click the **Modify** link. See *Figure 142*. The Modify waiting list entry page will display. See *Figure 143*.
11. Complete the form.
12. Click **Update Waiting List Entry**, or **Cancel** to abort. The Waiting List will display with the modified information listed.



Waiting List Summary
Total number of entries: 1
The first waiting list entry was added on: Feb 19 2010 4:50PM
The last waiting list entry was added on: Feb 19 2010 4:50PM

[Add a new waiting list entry](#)

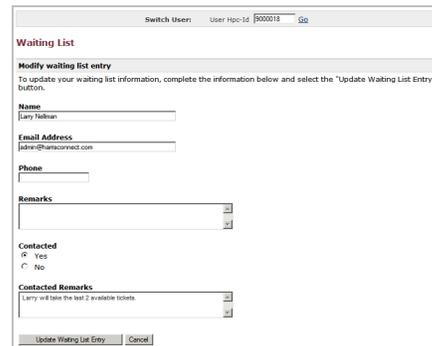
Waiting List Entry Details
Added on: 20100219 16:50:54

[Modify](#) [Remove](#)

Name: Alison
Email Address: Drake
Phone: 856-999-1212
Remarks: Interested in 2 regular tickets.
Contacted: No
Contacted Remarks:

[Return to waiting list](#)

Figure 142



Switch User: User rhp-16 800018 Go

Waiting List

Modify waiting list entry
To update your waiting list information, complete the information below and select the "Update Waiting List Entry" button.

Name
Larry Helman

Email Address
lhelman@harrisconnect.com

Phone

Remarks

Contacted
 Yes
 No

Contacted Remarks
Larry will take the last 2 available tickets.

Figure 143

Matching Guests

The Matching Guest feature allows the registrant to indicate which guest will be accompanying them to the event or sub-events. 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.

IMPORTANT!

You must select an event template that automatically includes the matching guest feature such as the *Event with guests* or *Multi-page guest event* templates.

The matching guest feature **cannot** be activated via the Edit Event Configuration > Special Features & Function tab.

Event Registration

Guest Information

Please select the guests that will accompany you to each event below.

Alumni Tickets
(Select 1)

Larry Nellman
 Lauren Nellman

Child Ticket (12 and under)
(Select 1)

Larry Nellman
 Lauren Nellman

Confirmation

Please check your information carefully for accuracy, and then click "Submit."

To Be Determined (TBD) Guests

If the registrant is not sure of "who" will be accompanying them the event or sub-events, he/she can leave the Guest Information blank, and TBD will display for the unknown Guest Listing.

IMPORTANT!

The Matching Guest section must display on separate page from the Event Guest section. If the admin chooses to hide the Matching Guest page, all guests will display in Event Reporting for each event item or sub-event.

How to deactivate matching guests:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the page tab where the Match Guest page is on.
7. Click the **Hide** link next to the **Match Guest** section. See *Figure 144*.

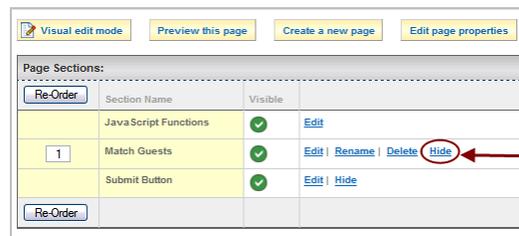


Figure 144

Credits (Refunds)

Enabling credits allows alumni/members to modify or cancel their order or registration and to request credit. A link to the order modification interface will appear within the online community once an order or registration has been submitted. See *Figure 145*.

Event Registration

Registration History

To view, modify or cancel a registration, select the event below.

Event Title	Event Date	Reference Number	Order Date	Billed
Raleigh Wine & Cheese	05/30/2009	EX02-3081-896740	04/16/2009	\$30.00
Alumni Ice Cream Social	05/23/2009	EX021124364	02/04/2009	\$15.00 Credit Pending
Homecoming 2008	06/06/2009	EX02-1394-781935	08/10/2008	\$15.00
Reunion 2007	06/06/2009	EX02-1394-779784	07/29/2008	\$25.00

Figure 145

How to activate credits/refunds for members:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit Event Configuration** tab at the top of the page. The Payment Processing page will display by default.
7. Click the **Special Features & Functions** tab. The Special Features & Functions page will display.
8. Scroll down to the **Credits** section.
9. Check the **Allow customer to request credit** checkbox. The credit section will expand to display the date option. See *Figure 146*.
10. Select the appropriate date.
11. Click **Finished**, or **Cancel** to abort. The Special Features and Function page will display with the **Update successful** on screen confirmation at the top.

Allow customer to request credits

Requests for credit will be accepted until:

January
1
2008

Figure 146

Non-calendar Event

Defining an event as a Non-calendar event prevents it from displaying on the public event calendar. It is important to set a new event as “non-calendar” while you test the functionality of the event form. Once you have successfully set online processing to hit the Production (live) server, you need to remove the non-calendar feature.

A non-calendar events graphic icon displays next to the Event Name on the Create and Manage Event page. See *Figure 147*.

2624	Wine & Cheese Event II Wine & Cheese Event II	 Non-calendar event	Active
Preview Edit Thank You Page Confirmation Email Payment Processing Campaigns Activation Rename Copy Delete			

Figure 147

How to set an event as non-calendar:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit Event Configuration** tab at the top of the page. The Payment Processing page will display by default.
7. Click the **Special Features & Functions** tab. The Special Features & Functions page will display.
8. Scroll down to the **Non-calendar Event** section.
9. Check the **Define this event as a Non-calendar event** checkbox. See *Figure 148*.
10. Click **Finished**, or **Cancel** to abort. The Special Features and Function page will display with the **Update successful** on screen confirmation at the top.

Non-calendar event

Defining an event as a *Non-calendar event* prevents it from displaying on the community calendar.

Define this event as a *Non-calendar event*

Figure 148

How to unset an event as non-calendar:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit Event Configuration** tab at the top of the page. The Payment Processing page will display by default.
7. Click the **Special Features & Functions** tab. The Special Features & Functions page will display.
8. Scroll down to the **Non-calendar Event** section.
9. Uncheck the **Define this event as a Non-calendar event** checkbox. See *Figure 148*.
10. Click **Finished**, or **Cancel** to abort. The Special Features and Function page will display with the **Update successful** on screen confirmation at the top.

Categories & Campaigns

Campaigns

The Campaigns feature enables an administrator to assign an Event form to a particular campaign. For example: The **Annual Fund ~ Alumni Gifts** form could be assigned to **Annual Fund 2009 Campaign**. In the future, administrators will be able to pull reports on specific campaigns.

Add an Event Campaign

How to add a campaign:

1. Log into the **Administration Center**.
2. Mouse over **Community Management** in the top navigation. The *Community Management* sub-menu will display.
3. Mouse over Configuration. Select Add Campaigns. The Add campaigns page will appear. *See Figure 149.*
4. Enter the Campaign name. 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.



Figure 149

Assign an Event Campaign

How to assign a campaign:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit Event Configuration** tab at the top of the page. The Payment Processing page will display by default.
7. Click the **Categories & Campaigns** tab. The Categories & Campaigns page will display.
8. Select one or more campaigns from the **Available campaigns** list.
9. Click the **Add** button () to add the select campaign(s) to the **Selected campaigns** list.
10. Click **Finished**, or **Cancel** to abort. The page will refresh and the **Campaign mapping successful** confirmation will display at the top of the page.
11. Click the link Manage your organization's campaigns in this section to add additional campaigns or assign a campaign to an additional application.

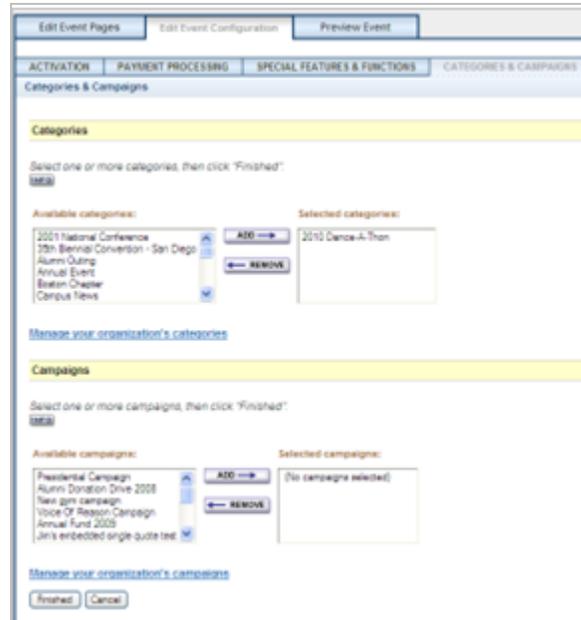


Figure 149

Categories

The Category feature enables an administrator to assign an Event form to a particular category. For example, the Boston Holiday Party event form might be assigned to the category Boston Chapter.

Add an Event Category

How to add a category:

1. Log into the **Administration Center**.
2. Mouse over **Community Management** in the top navigation. The *Community Management* sub-menu will display.
3. Mouse over **Configuration**. Select **Manage /Add Form Categories**. The Configuration: Categories page will appear. Click the Add A Category Link. See *Figure 150*.
4. The popup box will appear. See *Figure 151*.
5. Enter the Category name and the forms for which it will be used. Click Save or Cancel.
6. The new category will be inserted alphabetically into the list of Category names.

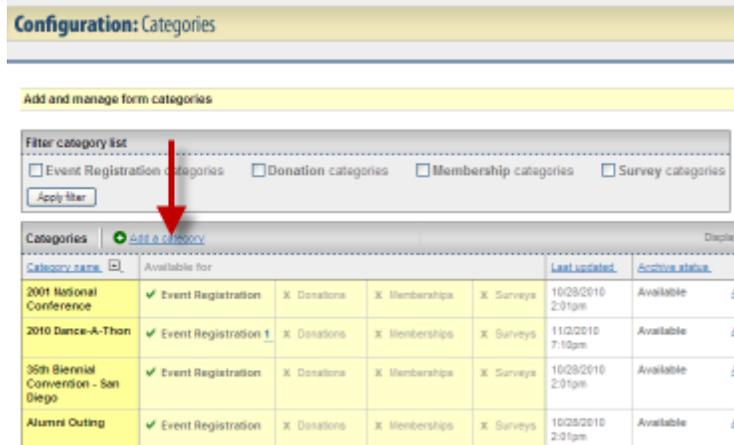


Figure 150

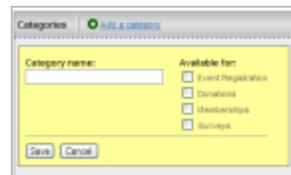


Figure 151

Note: the Categories & Campaigns page is also accessible from the Assign Event Categories page by clicking the link Manage your organization's categories.

Assign an Event Category

How to assign a category to a form:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit Event Configuration** tab at the top of the page. The Payment Processing page will display by default.
7. Click the **Categories & Campaigns** tab. The Categories & Campaigns page will display.
8. Select one or more categories from the **Available categories** list.
9. Click the **Add** button () to add the selected category to the **Selected categories** list.
10. Click **Finished**, or **Cancel** to abort.

Note: Click the link in this section [Manage your organization's categories](#) to add additional categories or assign a campaign to an additional application.

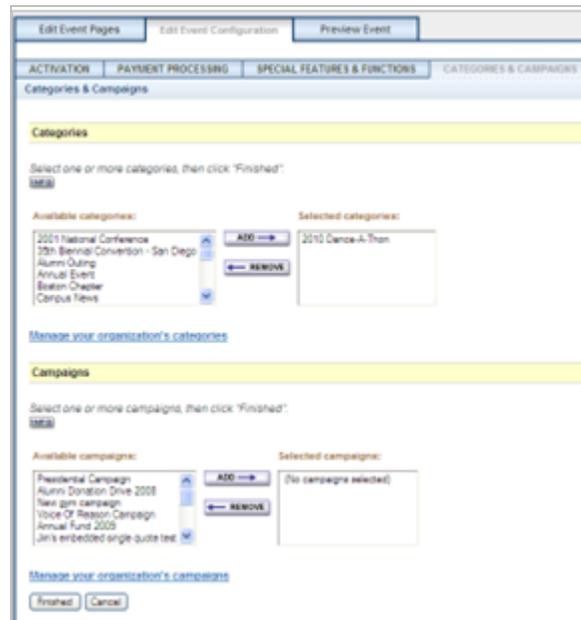


Figure 150

Branding

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

Modify Branding/Wrapper

How to modify event form branding/wrapper:

1. Log into the **Administration Center**.
2. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
3. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear.
4. Scroll down to the **Manage Events** section.
5. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
6. Click the **Edit Event Configuration** tab at the top of the page. The Payment Processing page will display by default.

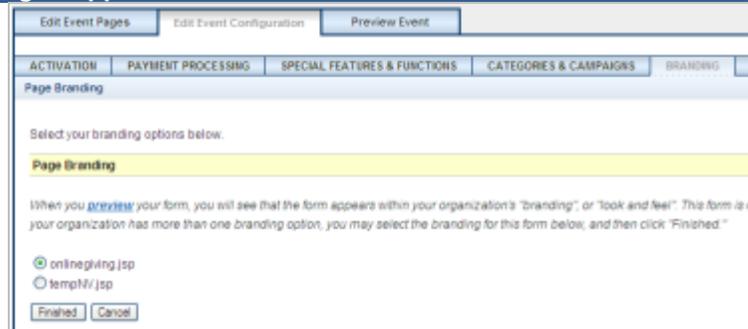


Figure 151

7. Select **Branding** tab. The **Branding** page will display. See *Figure 151*.
8. Select appropriate branding radio button.
9. 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. A user must be logged into the form (using the Registered Member Prompt section) for this feature to work.

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

Suggestion: 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.

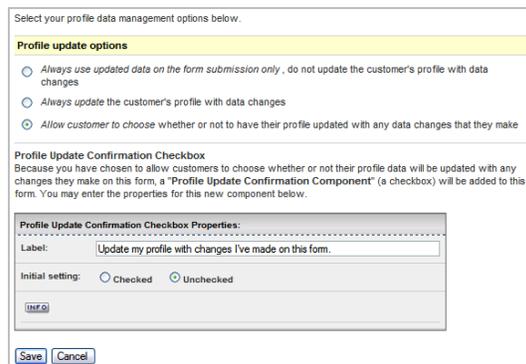
Activate Profile Data Management

How to activate profile data management:

11. Log into the **Administration Center**.
12. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
 1. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear
 2. Scroll down to the **Manage Events** section.
 3. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
 4. Click the **Edit Event Configuration** tab at the top of the page. The Payment Processing page will display by default.
 5. Select **Profile Data Management** tab. The Profile Data Management page will display. See *Figure 152*.
 6. Select your **profile data management** option.

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

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



Select your profile data management options below.

Profile update options

- Always use updated data on the form submission only, do not update the customer's profile with data changes
- 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

Profile Update Confirmation Checkbox
Because you have chosen to allow customers to choose whether or not their profile data will be updated with any changes they make on this form, a "Profile Update Confirmation Component" (a checkbox) will be added to this form. You may enter the properties for this new component below.

Profile Update Confirmation Checkbox Properties:

Label:

Initial setting: Checked Unchecked

Figure 152

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

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:

13. Log into the **Administration Center**.
14. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
 1. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear
 2. Scroll down to the **Manage Events** section.
 3. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
 4. Click the **Edit Event Configuration** tab at the top of the page. The Payment Processing page will display by default.
 5. Select **Profile Data Management** tab. The Profile Data Management page will display.
 6. 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 153.*
 7. Enter the **Trigger name**.
 8. Select the **Profile data field**.
 9. Select the **flag value** (Alphanumeric or Date)
 10. Select **Trigger type** (Form Submission or Form Input).
 11. If Form input trigger type is select, select the components or component-options. *See Figure 154.*
 12. Click **Save**, or Cancel to abort.

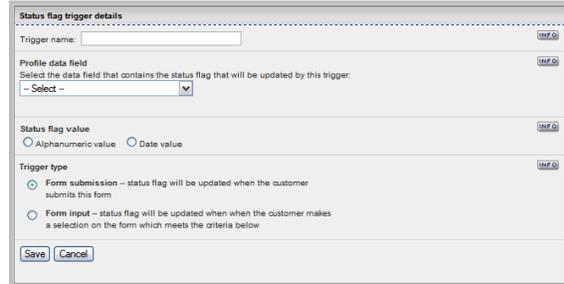


Figure 153

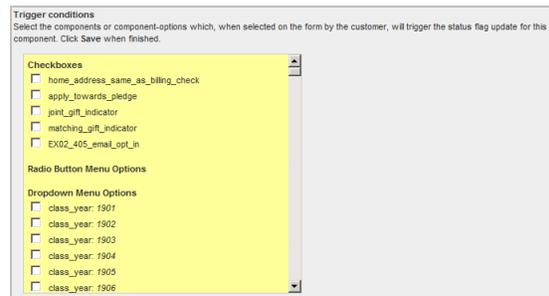


Figure 154

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 157, 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 158. Contact your Client Relations Manager to activate this feature.

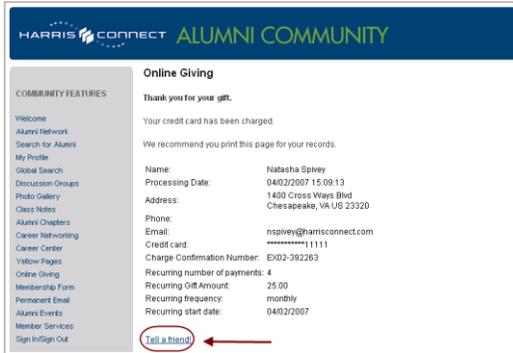


Figure 155

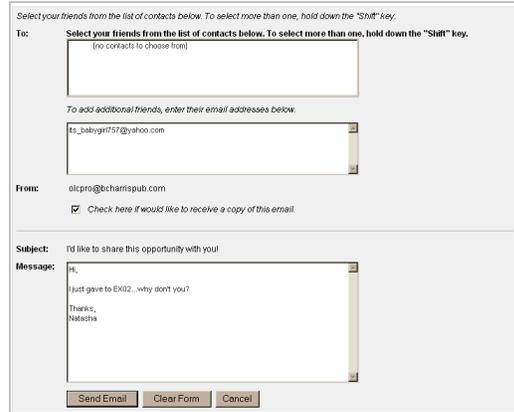


Figure 158

The recipient's email will contain the message the customer submitted, with a link to the form. See Figure 156.

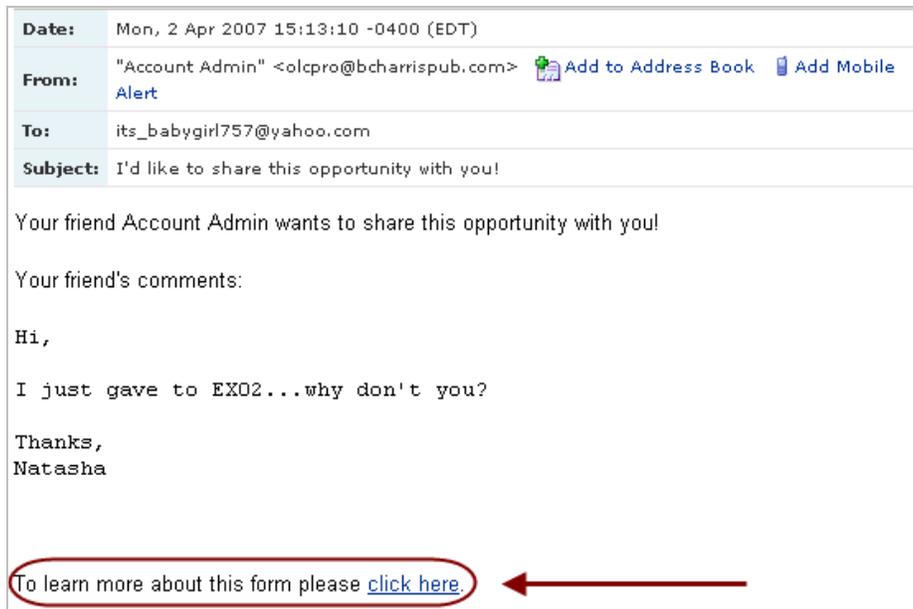


Figure 156

Configure Tell-A-Friend

How to configure the Tell-A-Friend for a specific event:

15. Log into the **Administration Center**.
16. Mouse over **Forms Management** in the top navigation. The *Forms Management* sub-menu will display.
 1. Mouse over **Events** and select **Create/Manage Events**. The Event Registration application will appear
 2. Scroll down to the **Manage Events** section.
 3. Click the **Edit** link next to the appropriate form. The **Edit Forms** page will display.
 4. Click the **Edit Event Configuration** tab at the top of the page.
 5. Select **Tell A Friend** tab. The Tell-a-Friend page will display.
 6. Check the **Include the "Tell a friend" link on the Thank you page** checkbox.
 7. Modify the **Link Text**. "*Tell a friend!*" is the default link text.
 8. Modify the **Subject Text**. "*I'd like to share this opportunity with you!*" Is the default subject text. See *Figure 157*.
 9. Click **Finished**, or **Cancel** to abort.



Figure 157

Appendix A: Adding default parameters to form links

Normally, when a form link is included on a web page or in an email, the “Form URL” provided on the **Preview** tab within the associated form application is used (see image below). However, default parameters may be added to that standard Form URL in order to set default values in certain form fields when the end user clicks on the link and views the form. For example, this feature could be used to set the default value of an optional “Receive our monthly newsletter” checkbox to be *checked* for all individuals who click the form link.

To add default parameters to a form link, append the appropriate values to the standard form link as follows:

1. Determine the link for the appropriate form (this can be found on the **Preview** tab within the associated form application as shown below. See *Figure 161*.

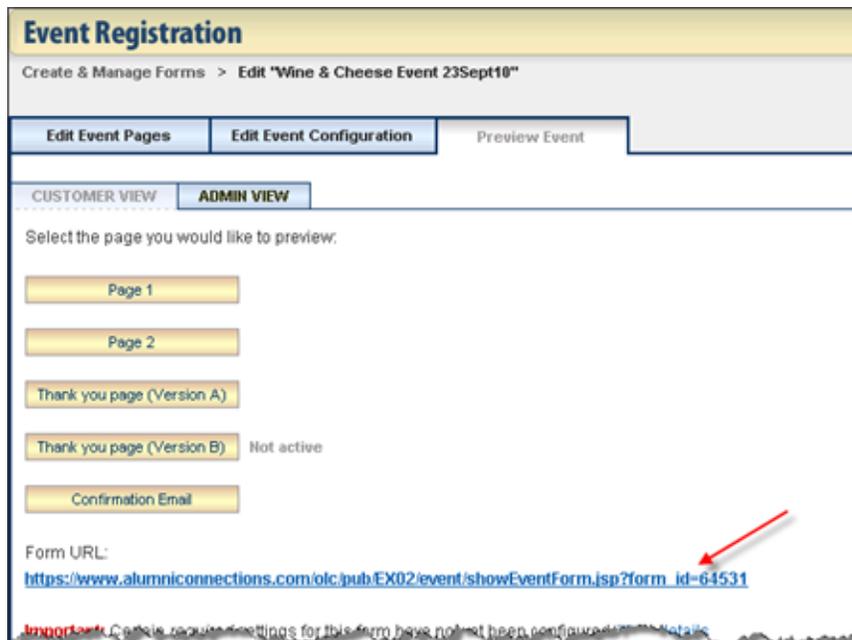


Figure 161

2. At the end of the form link URL, add an ampersand (“&”) followed by “referrer_type=” and the appropriate referrer type code as described below:
 - a. “UR”: when this code is used, the values passed via the default parameters will take precedence over existing profile values for authenticated users. So, if a user is authenticated, and the fields that are being set by the default parameters have ALSO been set up to be pre-populated with profile data, the form will display the default parameter values when the user clicks the link.
 - b. “UP”: when this code is used, existing profile data will take precedence over the values passed via the default parameters for authenticated users. So, if a user is authenticated, and the fields that are being set by the default parameters have ALSO been set up to be pre-populated with profile data, the form will display the profile data when the user clicks the link.

Note that if the user clicking the form link is not authenticated, the default parameter values will always display.

3. Add another ampersand (“&”) followed by the identifier of the form component that you want to pre-populate followed by an equal sign (“=”) and the desired default value for that component (e.g., “&home_lastname=Smith”). The form component identifier can be found on the Edit section page within the appropriate form application. See *Figure 158*. Repeat this step for each additional default parameter to be included in the form link.

IMPORTANT!

Parameters must follow URL-encoding standards. For example,
 @ = %40 (i.e. mschanba%40harrisconnect.com)
 a space = + sign or %20 (i.e. 123+Main+Street or 123%20Main%20Street)

see the online reference http://www.w3schools.com/tags/ref_urlencode.asp

"Personal Information" Components:				
ORDER	KEY PROPERTIES			
	INFO	INFO	INFO	INFO
Re-Order	Label for display	Identifier	Type	Availability
1	Personal Info Label	pers_info_label1	TEXT	E
2	Title: (Mr., Ms., etc.)	home_prefixname	INPUT	E
3	First Name:	home_firstname	INPUT	E

Figure 158

4. Include the revised link in an email or on a web page to make it available to constituents.

An example of a standard form link with default parameters:
https://secure.www.alumniconnections.com/olc/pub/ORGCODE/onlinegiving/showGivingForm.jsp?form_id=FORMID&referrer_type=UR&billing_country=USA

A constituent clicking this link would access the form such that the billing_country component would be set to “USA” by default and any profile data used to pre-populate that component would be ignored