



Event Registration Check List for Building & Testing Event Forms

ERCL-1-3-18-11

✓	LABEL	ITEM
	Edit Event Pages	REGISTRATION FORM PAGES
	+ Create an event form	Create form using appropriate template format*
	INFO	*Click Info button for format details
		Choose meaningful Form name and Notes/Description
		Hide* sections and components not needed for the registration form *Never delete; always choose Hide or Admin Only settings in Visibility column
	Event Details Event title: Event date: Location:	If these components should not appear on your form, flag them as Admin Only ; do not hide ; they must contain valid data for the form to function properly: Event Location Event Title Event Start Date
	<input checked="" type="checkbox"/> This is an event item	Each item collecting money (or free) and quantity must be flagged as an event item on its component properties page
		All items collecting money (or free) and quantity, along with Total field, must appear on the same form page
		Verify all items collecting money (or free) and/or quantity have been included in the calculation of the Total field
		Guest matching section must appear on a page FOLLOWING the page containing the TOTAL field
	THANK YOU PAGE	THANK YOU PAGE
		If content has been customized be sure to review the Thank You page displayed on screen during testing phase
	CONFIRMATION EMAIL	CONFIRMATION EMAIL
		Do not disable Confirmation Email; this ensures constituents will receive a copy of their registration for their records
		Insert appropriate "From" Email Address
		Customize Email Subject Line to include the event title
		Use Blind Copy Option to ensure staff will receive a copy of all confirmations
		If content has been customized be sure to review the Confirmation Email received during testing phase
	Edit Event Configuration	EVENT CONFIGURATION
	ACTIVATION	Confirm event is activated; this is required to test and/or process registration forms
	PAYMENT PROCESSING	Confirm a payment processing type* has been activated *A Payment Processing Type must be enabled for all registration forms *Choose No Payment Processing if form will not collect funds
		Confirm billable component has been selected
		Confirm Merchant ID has been selected

		Confirm Payment Processing Server is set to PRODUCTION when form is ready to accept constituent registrations
	SPECIAL FEATURES & FUNCTIONS	Enable Order Discount if admin will be applying discounts or comps
		Select Non-calendar status for events which should not display on community calendar
	CATEGORIES & CAMPAIGNS	Assign appropriate category and/or campaign for display purposes and future reporting purposes
	PROFILE DATA MANAGEMENT	If using this feature, confirm profile update option is flagged
	Preview Event	TESTING
		All forms must be tested prior to releasing to constituents for registration Use form URL to enter multiple test registrations
		If Warning message appears click link to review form settings
		Confirm Payment Processing Server is set to TEST during build and test phase
		Select Non-calendar status to hide form while testing
		Verify Thank You page
		Verify Confirmation Email
		Verify Reporting fields
	View & Manage Orders	MODIFY ORDERS
		Test Modify and Cancel functionality on test orders to confirm expected results
		Cancel all test registrations at conclusion of testing to remove from reporting
	Event Registration Reports	REPORTS
		Create various reports to ensure the data collected will meet staff requirements
		Create saved queries to reuse useful report formats
		Confirm date selection is accurate prior to running report