

How to Help With Financial Reporting

There's one step you can take to make this easier: Add the speedtype and description.

-Edit Event Configuration

-Payment Processing

-Custom Data for CyberSource

-Fixed Value: -speedtype-eventname (keep exact formatting with dashes)

The screenshot shows the Administration Center interface for the CU-Boulder Alumni Association. The page is titled "Administration Center" and includes a navigation menu with options like Home, Shortcuts, User Management, Email Marketing, Forms Management, Community Management, Mobile, and Reporting. The main content area is titled "Custom Data for CyberSource" and contains a form for configuring custom data. The form includes a table of payment methods (Pay At Door, Check*, Money Order*), a section for entering mailing address (Address Line 1-3, City, State, Zip/Postal Code, Country), and a section for selecting the type of custom data to send to CyberSource. The "Fixed value" field is highlighted with a red circle and contains the text "-12979995-NWSS".

INVOICE	EQ	EQ
Pay At Door	<input type="checkbox"/>	<input type="checkbox"/>
Check*	<input type="checkbox"/>	<input type="checkbox"/>
Money Order*	<input type="checkbox"/>	<input type="checkbox"/>

*Enter the mailing address for Check or Money Order:

Address Line 1:
Address Line 2:
Address Line 3:
City:
State: -- Select --
Zip/Postal Code:
Country:

Custom Data for CyberSource

Select the type of custom data you would like to send to CyberSource.

None
 Fixed value: -12979995-NWSS
 Form data: -- Select --
 Profile data: -- Select --

Note: Profile data will only be passed if customer is logged in at the time of form submission.

How to Cancel an Order

-Be sure to get manager's approval ahead of time

-Get into the specific event

-View and Manage Orders

-Locate specific order (ctrl+f to find the name if dealing with a large list)

-Click the Cancel link

Name	Date	Order #	Event	Amount	Status	Actions
Kieft, Christine	2012-01-09	2103706	COB-117190-2303706 12979995	\$144.00	Processed	View summary View full registration Modify Cancel
Blodgett, Robert H.	2012-01-09	2103707	COB-117190-2303707 12979995	\$72.00	Processed	View summary View full registration Modify Cancel
Plunkett, Ronald	2012-01-09	2103723	COB-117190-2303723 12979995	\$540.00	Processed	View summary View full registration Modify Cancel
Lessen, Jeffrey	2012-01-09	2103762	COB-117190-2303762 12979995	\$48.00	Processed	View summary View full registration Modify Cancel
Marcucci, Emma	2012-01-09	2103776	COB-117190-2303776 12979995	\$12.00	Processed	View summary View full registration Modify Cancel
Chen, Ming	2012-01-09	2103835	COB-117190-2303835 12979995	\$24.00	Processed	View summary View full registration Modify Cancel
Salo, Kristen	2012-01-09	2103937	COB-117190-2303937 12979995	\$48.00	Processed	View summary View full registration Modify Cancel
Zheng, Jane	2012-01-09	2103941	COB-117190-2303941 12979995	-\$48.00	Credited	View summary View full registration
Cantrell, Deborah	2012-01-09	2103966	COB-117190-2303966 12979995	\$12.00	Processed	View summary View full registration Modify Cancel
Zhang, Wei	2012-01-09	2104049	COB-117190-2304049 12979995	\$36.00	Processed	View summary View full registration Modify Cancel
Cook, Laura	2012-01-09	2104069	COB-117190-2304069 12979995	\$24.00	Processed	View summary View full registration Modify Cancel
Gonzales, Audrey	2012-01-10	2104999	COB-117190-2304999 12979995	\$96.00	Processed	View summary View full registration Modify Cancel

-Make sure all boxes are checked and click Process this Cancellation

Name	Date	Order #	Event	Amount	Status	Actions
Kieft, Christine	2012-01-09	2103706	COB-117190-2303706 12979995	\$144.00	Processed	View summary View full registration Modify Cancel
Blodgett, Robert H.	2012-01-09	2103707	COB-117190-2303707 12979995	\$72.00	Processed	View summary View full registration Modify Cancel
Plunkett, Ronald	2012-01-09	2103723	COB-117190-2303723 12979995	\$540.00	Processed	View summary View full registration Modify Cancel
Lessen, Jeffrey	2012-01-09	2103762	COB-117190-2303762 12979995	\$48.00	Processed	View summary View full registration Modify Cancel
Marcucci, Emma	2012-01-09	2103776	COB-117190-2303776 12979995	\$12.00	Processed	View summary View full registration Modify Cancel
Chen, Ming	2012-01-09	2103835	COB-117190-2303835 12979995	\$24.00	Processed	View summary View full registration Modify Cancel
Salo, Kristen	2012-01-09	2103937	COB-117190-2303937 12979995	\$48.00	Processed	<div style="border: 1px solid black; padding: 5px;"> <p>Select options, then click "Process this cancellation"</p> <p><input checked="" type="checkbox"/> Send an email notification to the registrant after cancelling</p> <p><input checked="" type="checkbox"/> Make the inventory available again</p> <p><input checked="" type="checkbox"/> Credit the amount</p> <p>Process this cancellation</p> </div>
Zheng, Jane	2012-01-09	2103941	COB-117190-2303941 12979995	-\$48.00	Credited	View summary View full registration
Cantrell, Deborah	2012-01-09	2103966	COB-117190-2303966 12979995	\$12.00	Processed	View summary View full registration Modify Cancel
Zhang, Wei	2012-01-09	2104049	COB-117190-2304049 12979995	\$36.00	Processed	View summary View full registration Modify Cancel
Cook, Laura	2012-01-09	2104069	COB-117190-2304069 12979995	\$24.00	Processed	View summary View full registration Modify Cancel
Gonzales, Audrey	2012-01-10	2104999	COB-117190-2304999 12979995	\$96.00	Processed	View summary View full registration Modify Cancel
Arianiello, Nancy	2012-01-10	2105075	COB-117190-2305075 12979995	\$96.00	Processed	View summary View full registration Modify Cancel
Kingsley, Elizabeth	2012-01-10	2105180	COB-117190-2305180 12979995-NWSS	\$24.00	Processed	View summary View full registration Modify Cancel
Lozano, Judith	2012-01-10	2105229	COB-117190-2305229 12979995-NWSS	\$96.00	Processed	View summary View full registration Modify Cancel
McGinty, Greg	2012-01-10	2105266	COB-117190-2305266 12979995-NWSS	\$60.00	Processed	View summary View full registration Modify Cancel
Bustamante, Heidi	2012-01-10	2105374	COB-117190-2305374 12979995-NWSS	\$72.00	Processed	View summary View full registration Modify Cancel

-As an alternative, you may uncheck the "send an email" option and send the registrant an email on your own with the credit information, since the email that Harris auto-generates is very basic and may be confusing to the registrant some time has passed since registration. Be sure to include event name, order number, and amount credited.

-Send all pertinent info to whoever reconciles your accounts

- Who was refunded
- What was refunded (e.g. 2 adult NWSS tickets at \$15 each; 1 calendar at \$12.49)
- Date the original payment was received
- Total amount that was refunded
- Date the refund was issued
- Reason the refund was issued
- Proof of manager's approval of the refund (this can be via email string or written signature)

How to Most Efficiently Close Down Events

Creating events in Harris is a great way to promote your event, regardless of whether or not you are collecting registrations. They will show up in your event calendar and could even be relinked many times without your knowledge.

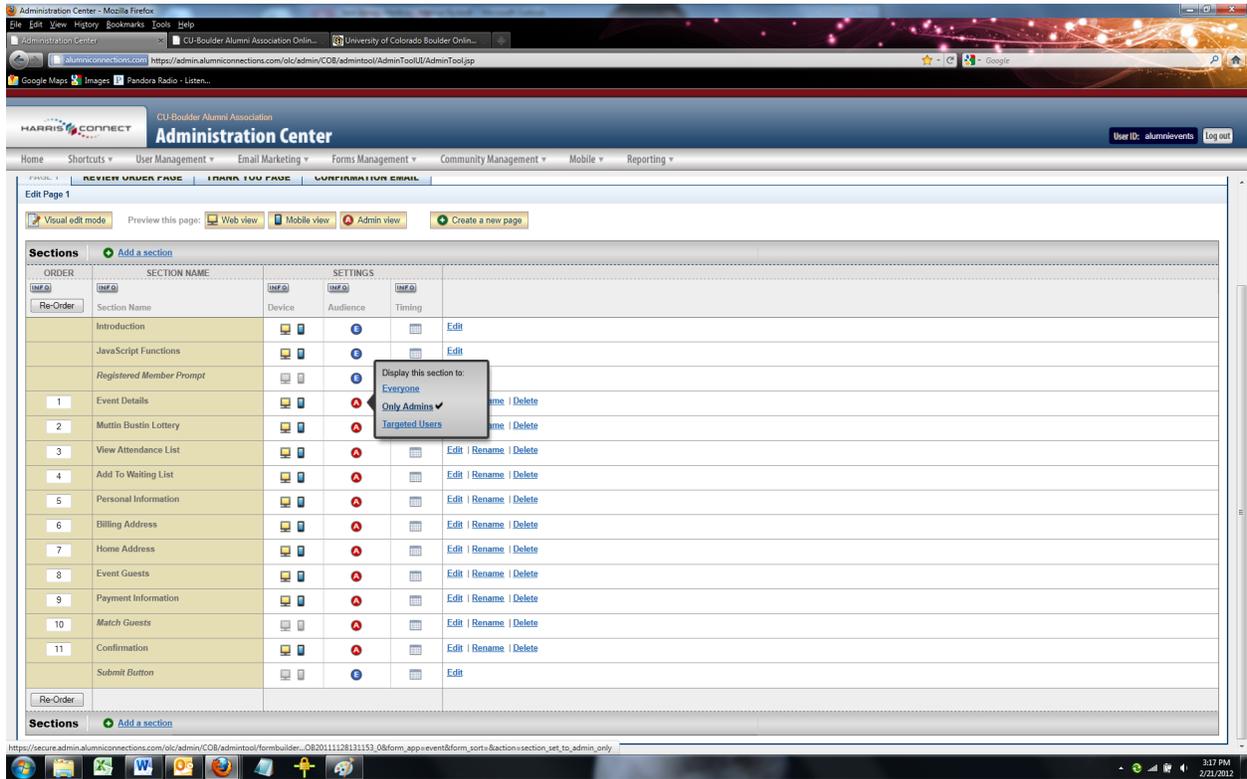
The screenshot shows the 'Events Calendar' page for the University of Colorado Boulder Alumni Association. The page features a navigation bar with 'About You', 'Make Connections', 'Events', and 'Ask A Buff'. The main content area displays a calendar for March 2012 with the following events:

Day	Event	Time
Tuesday, 28	DC Chapter Networking Reception	6:00pm ET
Wednesday, 29	Achieve Job Success Without the Stress!	6:00pm MT
Wednesday, 29	Webinar: Top Five Reasons You Should be LinkedIn	12:30pm MT
Thursday, 30	Watch CU alumni play in the NBA in Charlotte, NC!	7:00pm ET

Because of that, once you make an event 'active', you will want to keep it that way. Allowing events to remain on your calendar and remain active will allow both you and your constituents to have a better idea of what has gone on in your organization in the past as well as access event information even if registration has already closed. You will not, however, want to allow it to continue to collect registrations. Here's the best way to 'close' an event, while still allowing you to process back-end registrations and have event information remain available to your constituents.

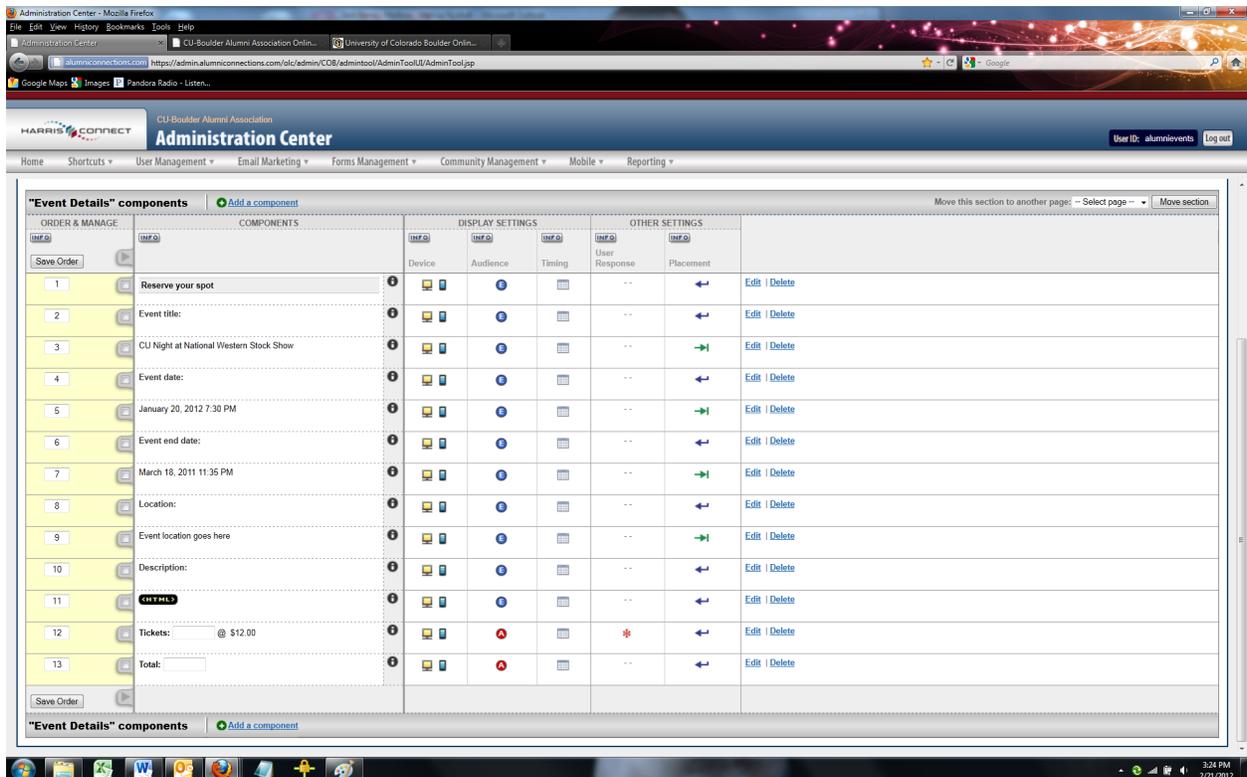
-Access the specific event. Because of the different ways events are created, here are two scenarios:

1.) If you include all event information in the “Introduction” section, make all other sections visible to an “Only Admins” audience.



2.) If you display event information to the public by entering it into “Event Details,” you’ll also want to leave that section as visible to Everyone. Click Edit on “Event Details.”

-Make only the sections pertaining to event items visible to “Only Admins.”



-Go back to “Edit Page 1.”

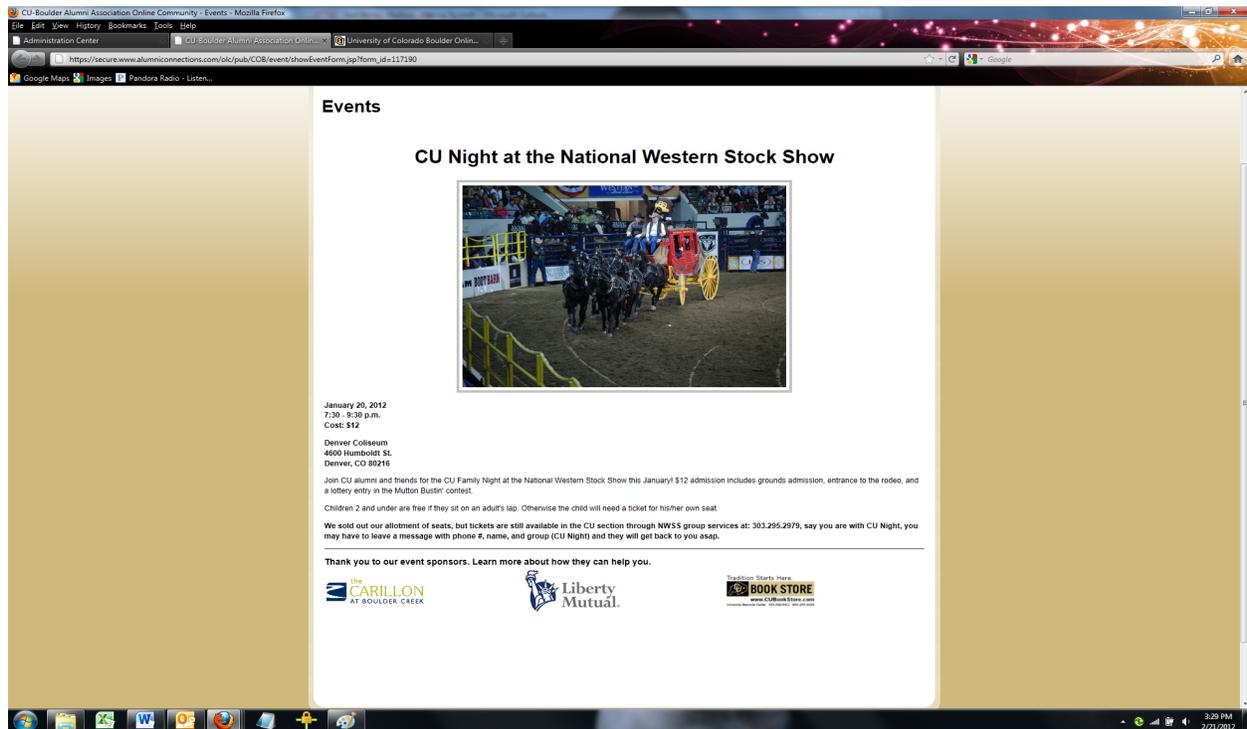
-Since the “submit button” won’t let you make it “Only Admins”, you’ll have to make that device “display this section for: neither.”

The screenshot shows the Administration Center interface for the CU-Boulder Alumni Association. The main content area is titled "Edit Page 1" and contains a table for configuring sections. The table has columns for "ORDER", "SECTION NAME", "SETTINGS" (Device, Audience, Timing), and actions (Edit, Rename, Delete). A tooltip is visible over the "Submit Button" row, showing the "Display this section for:" options: "Web only", "Mobile only", and "Neither" (which is selected).

ORDER	SECTION NAME	SETTINGS			
		Device	Audience	Timing	
	Introduction				Edit
	JavaScript Functions				Edit
	Registered Member Prompt				Edit
1	Event Details				Edit Rename Delete
2	Martin Dustin Lottery				Edit Rename Delete
3	View Attendance List				Edit Rename Delete
4	Add To Waiting List				Edit Rename Delete
5	Personal Information				Edit Rename Delete
6	Billing Address				Edit Rename Delete
7	Home Address				Edit Rename Delete
8	Event Guests				Edit Rename Delete
9	Payment Information				Edit Rename Delete
10	Match Guests				Edit Rename Delete
11	Confirmation				Edit Rename Delete
	Submit Button				Edit

Please also remember to go in and add a sentence about registration being closed, if and how they can register at the door, and who to contact if they have questions. You can set this up when you initially set up your event by making it a section that only displays on/during a certain set of dates.

Doing all this will ensure that your constituents still have access to event information, it won't make any pages or emails that may link to this event (or have it in an iframe, etc) non-functional, and you'll still be able to access it to process registrations on the admin side. People won't, however, be able to access the registration functions.



The screenshot shows a web browser window with the address bar displaying a URL from the CU Boulder Alumni Association. The page content includes a title 'CU Night at the National Western Stock Show', a photograph of a rodeo event, and event details such as the date (January 20, 2012), time (7:30-9:30 p.m.), and cost (\$12). It also lists the location as the Denver Coliseum and provides contact information for ticket inquiries. At the bottom, there are logos for sponsors including The Carillon at Boulder Creek, Liberty Mutual, and a Book Store.

To Process Registrations from the Admin Side

-Unfortunately, because the Submit button lacks an “Only Admins” function, you’ll have to first make it visible again by clicking “display this section for: both.” It will be visible to the public during the time that you are processing registrations, but will not have a function, so keep that in mind.

-Next, go to Preview Event

-Admin View

-Preview full form in “Admin View”

-You can now enter in all pertinent information and register attendees. They will still receive a confirmation email.

-When you are finished, remember to hide the Submit button again by clicking “display this section for: neither.”

*Note: If you are using a multi-page registration page, the ‘submit’ button is also the ‘continue’ button. Apply this to all pages.

