How to Help With Financial Reporting

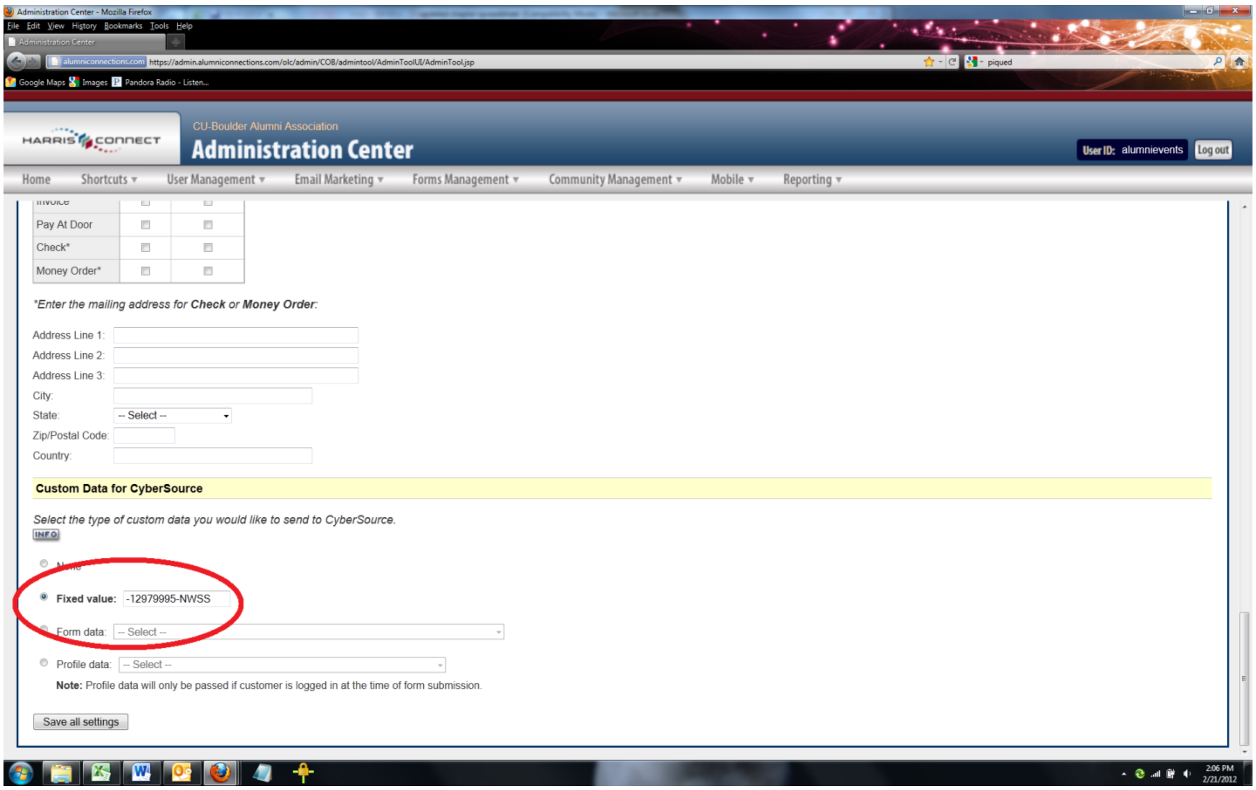
There's one step you can take to make this easier: Add the speedtype and description.

-Edit Event Configuration

-Payment Processing

-Custom Data for CyberSource

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



How to Cancel an Order

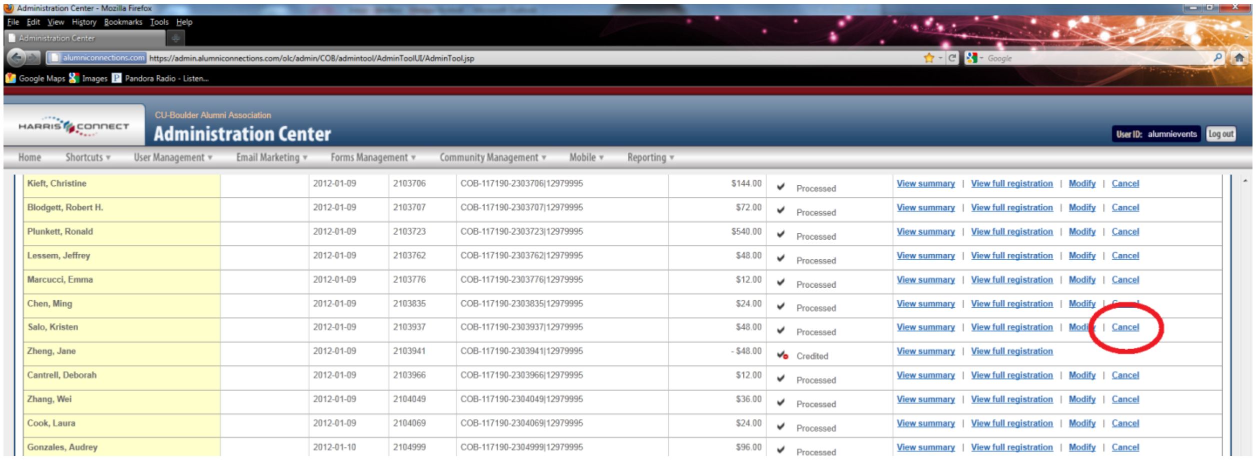
-Be sure to get manager's approval ahead of time

-Get into the specific event

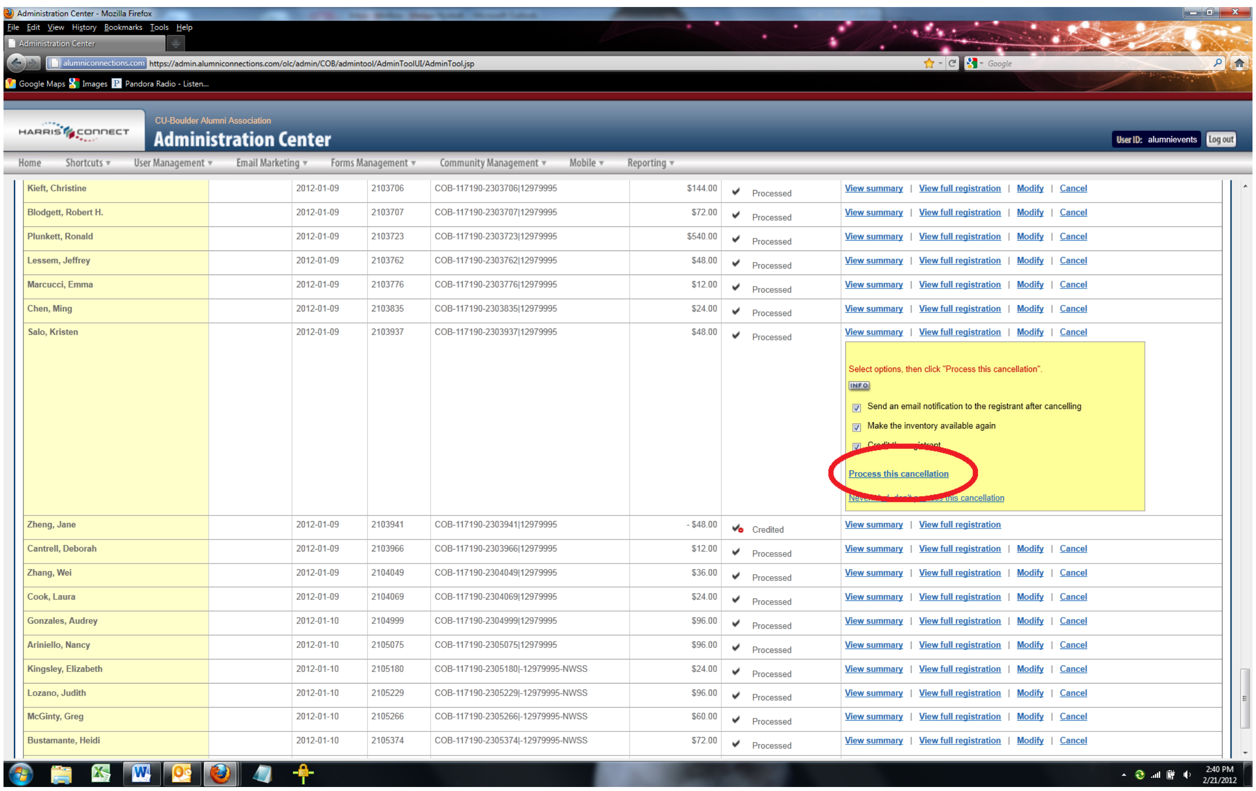
-View and Manage Orders

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

-Click the Cancel link



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



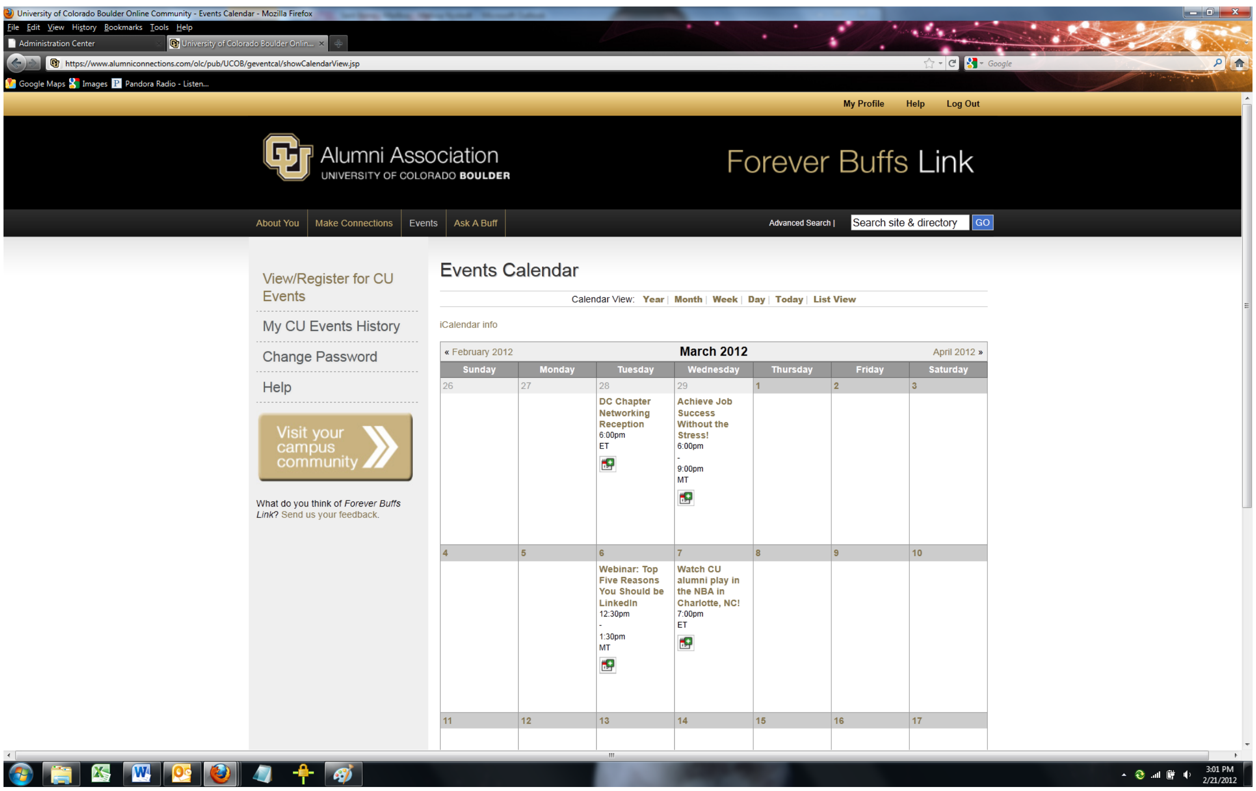
-As an alternative, you may uncheck the “send an email” option and send the registrant an email on your own with the credit information, since the email that Harris auto-generates is very basic and may be confusing to the registrant some time has passed since registration. Be sure to include event name,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

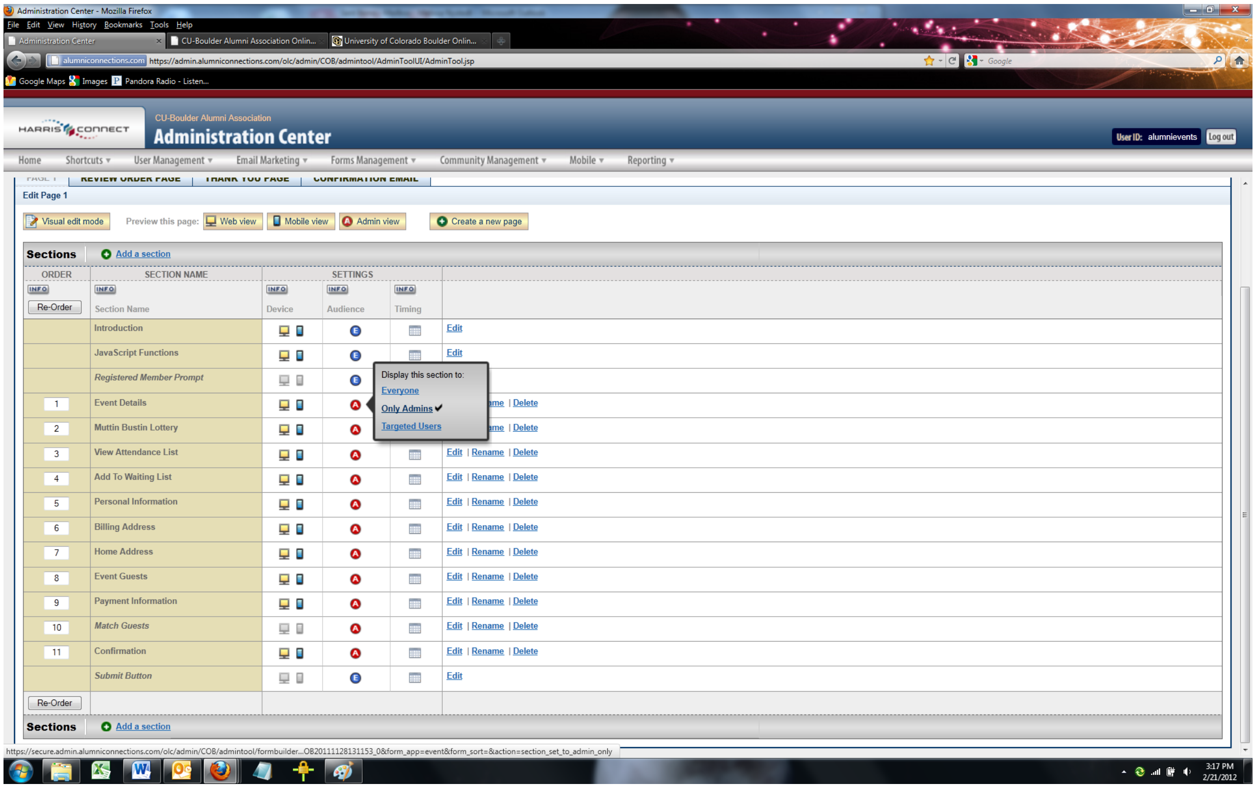
Creating events in Harris is a great way to promote your event, regardless of whether or not you are collecting registrations. They will show up in your event calendar and could even be relinked many times without your knowledge.



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.

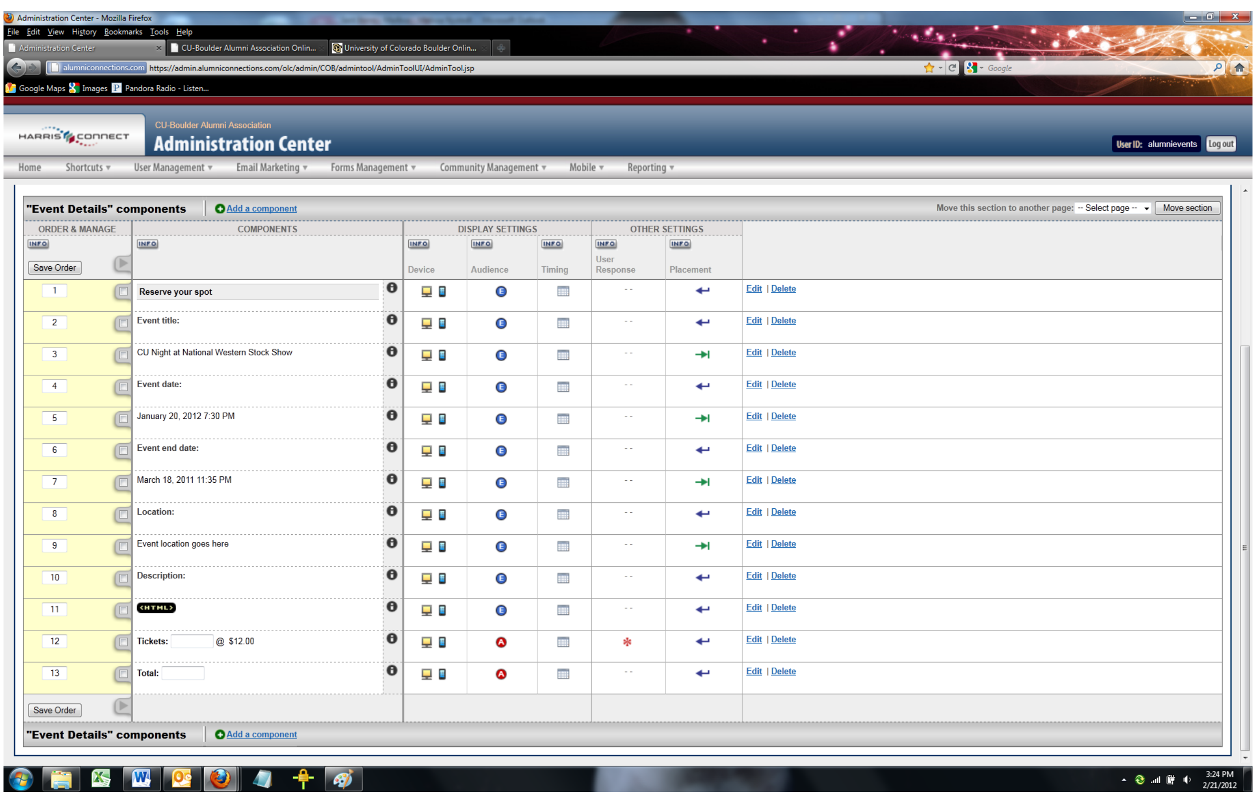
-Access the specific event. Because of the different ways events are created, here are two scenarios:

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



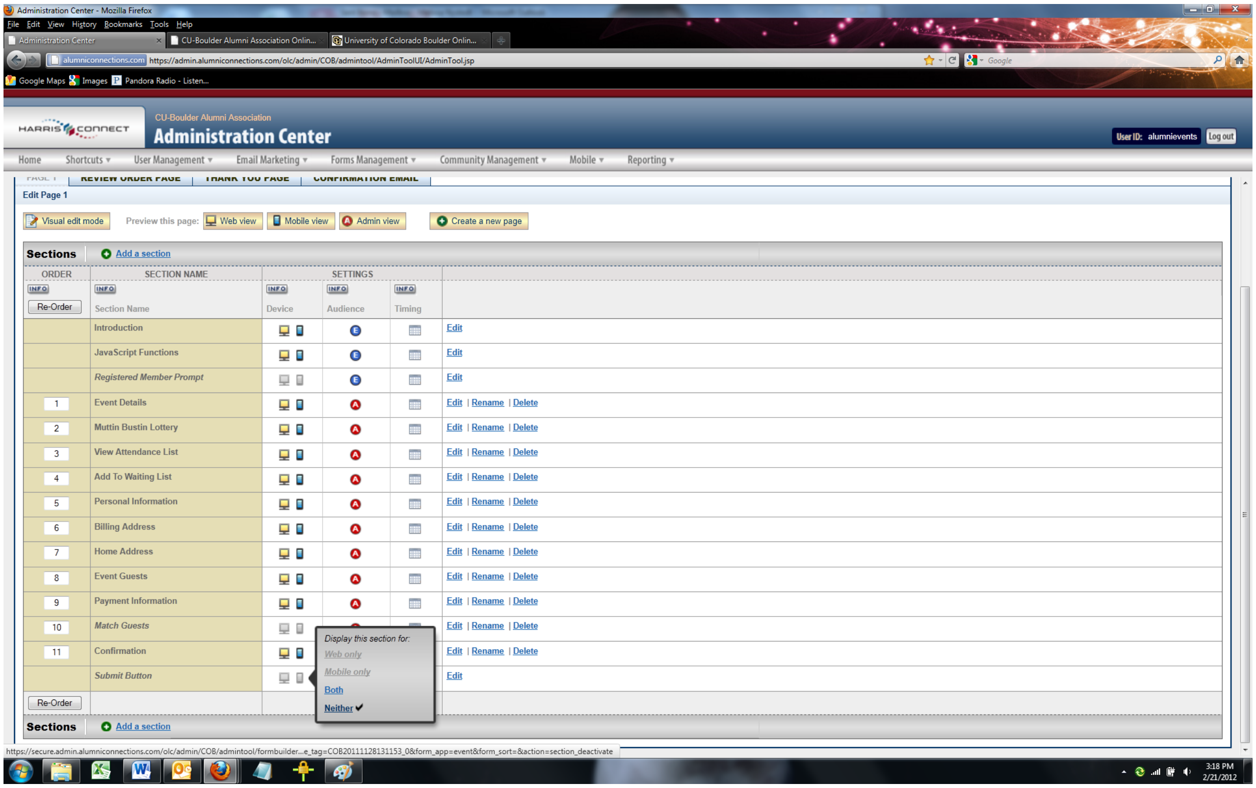
2.) If you display event information to the public by entering it into “Event Details,” you’ll also want to leave that section as visible to Everyone. Click Edit on “Event Details.”

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



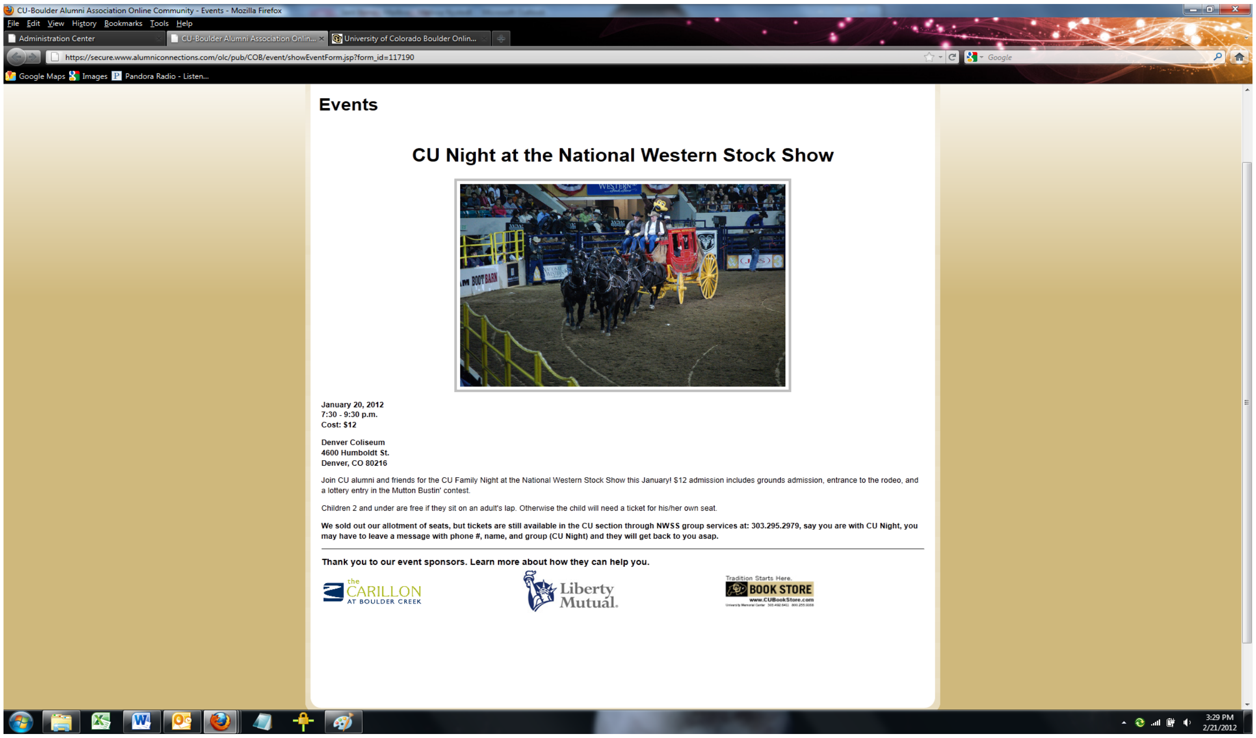
-Go back to “Edit Page 1.”

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



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.



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.