

Event Registration

CDM+ Event Registration handles the registration of persons for any type of event, conference, retreat, or camp. Registrations can be for people who are in the CDM+ Membership program or who are not. A history of event registrations is tracked for individuals tied to the Membership program. The CDM+ Event Registration program can optionally interface with the CDM+ Engage for online registration for events on your website. You can also connect a CDM+ Event Record to a Web Ministry Tool's Single Event Registration Tool to provide online registration options.

User-defined Activities are created to track the many types of information associated with each Event, such as workshops, materials, or T-shirts and sizes. Reports including lists, mailing labels, name badges, monies received and due, notices and confirmation letters, or emails may be created. The total number of persons registered for an event or activity can be easily viewed with limitations placed on either an event or activity.

Add an Event

►Program ►Event Registration ►Event Records

Before adding any registrations, an **Event Record** must be created. The Event Record includes a description, location, beginning and ending dates, and registration deadline. You can set a maximum registration limit to prevent over-committing event space. A registration fee for the event may be set here also. If there are various fees associated with the event, you would set up the different fees structures under Activities, and not under Event Information, Registration Fee. The Beginning/End/Deadline times are optional. Online registration times, including the deadline, will render in the visitor's local time zone. If times are omitted, the deadline will be US/Eastern.

The screenshot shows the 'Event Records' window. On the left is a sidebar with navigation options like 'SHOW', 'All', 'None', 'Find', 'Grid', 'Reports', 'DD', 'Add', 'Multi-Add', 'Change', 'Delete', 'GO', 'Registrations', 'Configure', and 'Collapse'. The main area displays a table of event records:

Event Description	Location	Beginning
Middle School Camp	Cornerstone Camp and Conference Center	Jun 14 2022 10:00 AM
High School Camp	Cornerstone Camp and Conference Center	Jun 8 2022 10:00 AM
Gala 2022		Sep 22 2022 12:00 AM
Family Harvest Festival	Local Apple Orchard	Sep 30 2023 1:00 PM
Fall Couples Retreat	Gatlinburg Resort	Sep 8 2022 6:00 PM
Fall 2022 Family Retreat	Blake Ridge Camp, North Carolina	Sep 30 2022 12:00 AM
Church Picnic 2021	Church grounds	Jul 9 2022 12:00 PM
Church Picnic 2020	Church grounds	Jul 10 2021 12:00 PM
Church Picnic 2019	Church grounds	Jul 11 2020 12:00 PM
Church Picnic 2018	Church grounds	Jul 13 2019 12:00 PM

Below the table, the 'Family Harvest Festival' record is selected, showing details in a form:

- Description: Family Harvest Festival (Camp/Youth Event)
- Location: Local Apple Orchard (Registration Closed)
- Include Time:
- Begin Date: Sep 30 2023 1:00 PM
- End Date: Sep 30 2023 10:00 PM
- Registration Deadline: Sep 23 2023 11:59 PM
- Registration Fee: 5.00
- Maximum Registration: 200
- Current Registration: 4
- Payment Account: 4400 Event Registrations (3000.4400.J)
- Fee Account: 5135 Credit Card Processing (3000.5135.I)



Event Registration Payments may be posted to the Accounting Ledger. Select the appropriate Income account from the drop-down list on the Payment Account field.

The Fee Account is used to record transaction fees for online payments.

Checking the **Camp/Youth Event** box will enable a Contacts entry tab on each registration record where information on two contacts (parent, guardian, or other) may be maintained. This checkbox may be used any time contact information would be helpful.

Event registrations can be linked to individuals in CDM+ Membership. This link provides a list of events for which an individual registered on the Events tab of their Individual Record. Turn on the **Skip Individual Record lookup when adding a new registration** checkbox only if you do not want the program to **automatically** open to the **Select Individual** window when adding a new registration.

Setting Up Activities

► Program ► Event Registration ► Event Records ► Activities

After entering the Event Information, create any Activities related to this event. Activities may or may not have costs associated with them. Example: T-shirt, cost \$12.00; Workshop A, no cost—just an assignment.

Description	Fee
Hay Rides	0.00
Apple Picking	0.00
Horseback Riding	5.00
Hot Air Balloon Rides	10.00
Dinner Voucher	5.00
Dessert Voucher	2.00
T-shirt - SM	10.00
T-shirt - M	10.00
T-shirt - L	10.00
T-shirt - XL	10.00
T-shirt - Custom Size	12.00



If you offer discounts for an event, you can create one or more activities with a *negative fee* that can be applied to reduce the Registration Fee. For example, you can apply an Early Bird Registration discount with an activity fee of $-\$75.00$.

Click the **Add Activity** button to create a new activity.

To change the order activities are displayed, highlight an activity in the list and use the **red arrows** to move it up or down. This will affect how Activities are displayed in an online registration also.

The activity Details are optional, but the **Category** drop-down list can be very helpful. Assigning a Category code to similar Activities will group them on the Registration Entry window and during online registration. Event Category codes can be added in the Master Coding System or by typing the code in the Category box.



The Capacity of an Activity is for this Activity only, whereas the Maximum Registration under Event Information applies to the entire event. Leaving the Capacity for an Activity at zero will result in it being marked as overbooked when even one person is registered for the Activity.

Building Connections to Events

► Program ► Event Registration ► Event Records ► Connections

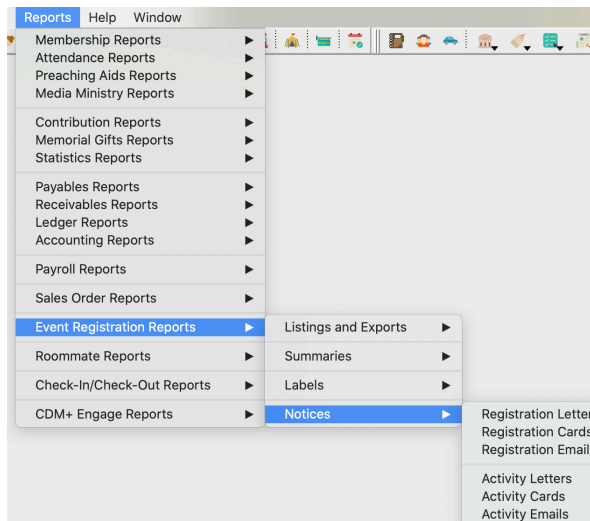
Connections gives you the ability to connect information from different CDM+ programs and from within the same program. For example, you can connect an event in Event Registration with an event record in CDM+ Check-In/Check-Out. You can connect this event to other events in CDM+ Event Registration, such as the same event held in earlier years.

You can connect the event to individuals in CDM+ Membership who are involved with the event, or employees

in CDM+ Payroll who do work for the event. Perhaps the event is funded by a memorial gift that is recorded in CDM+ Contributions; building a connection to that memorial gift designation can help maintain those records for future reference and reporting. You can even connect the event to rooms and resources in CDM+ Roommate.

Setting Up Registration Notices

► Reports ► Event Registration Reports ► Notices



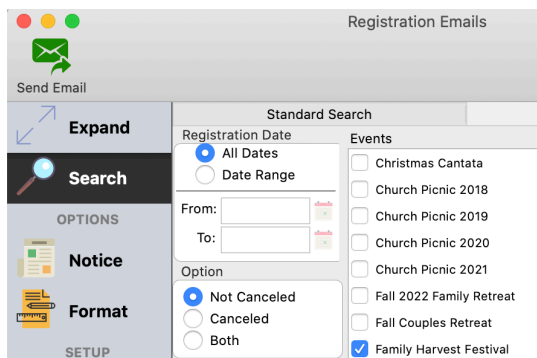
Both Event and Activity Notices (letters, cards, and emails) are created here.

Registration Notices can be sent to all registrants for this event. But if you need to communicate with just those registrants who have signed up for a particular activity, create an Activity Notice.

For example, if you create an Activity of "Chaperone" for a youth event, you can easily email all the chaperones using an Activity Email Notice.

If you want to send a confirmation email for registrations as they come in, you will need to create that Registration Email notice *before* you begin taking registrations (or, if accepting online registrations, before creating the tool and posting it on your website.)

There is no limit to the number of Registration or Activity notices that can be created, saved, and sent for an event.



Registration and Activity Notices are created the same as other Notices in CDM+. Select the **Notice Button** in the left-hand sidebar to create or view your notice. (Refer to the Notices section in this manual.)

Here you can select an existing notice, add a brand new notice, or duplicate and edit an existing notice.

Check the **Event** to select registrants to receive the notice.

Use the **Date Range** to avoid sending a confirmation notice to previous registrants. Note "Last Sent" date at bottom of the Notice tab or refer to the Sent Notices Window. By creating an **Advanced Search**, you can use registration notices to send reminder emails to people who may have not yet paid for the event.



The Event Registration Notices support advanced email, document creation, and editing. Attend the Notices class or refer to the Notices section in this manual for details on

Web Ministry Tools – Event Registration

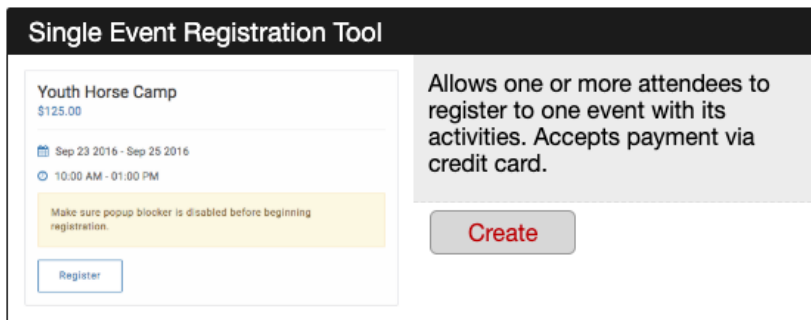
Requirements to use the CDM+ Single Event Registration Tool:

- Event Registration program in your CDM+ suite
- Subscription to a SAAS or Cloud plan
- And, if you elect to take online payments, a merchant account

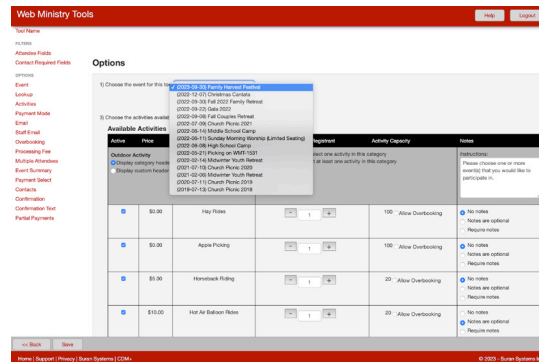
The Event Registration Web Ministry tool gets its data from: CDM+ Event Registration and, optionally, Membership

How you set up your event and activities in CDM+ determines much of how your tool for event registration functions. Before creating the Event Registration tool, set up your event and associated activities in CDM+ Event Registration. Remember, each event requires its own Event Registration Tool.

Once you have the event and its associated activities set up in CDM+, open your web browser and log into the Web Ministry Tools administration page at wmt.suran.com. Click the **New Tool** button, then click the **Create** button for the Single Event Registration Tool.



When you create the event, first scroll down to the **Options**, where you will use Option 1 to connect the tool to your event and define the options for the event. The dropdown list displays all events in your database that are not closed.



Then, scroll back up to the Attendees section. The First Name and Last Name fields on the **Attendees window** will always be required. If the event is marked as a Camp/Youth Event in its event record, First Name and Last Name will also be required on the **Contacts window**.

Filters

Under the **Filters** section, is where you define the appearance of the registration tool starting with the information for the event attendee.

For the remaining fields on the Attendees and Contacts windows, you have three options:

- **Required:** The field will be marked with an asterisk (*) and must be completed before the registrant can move on to the next step.
- **Not Required:** The field will display but completing it is optional.
- **Hidden:** The field will not display on the window. Marking unnecessary fields as hidden will make the online registration process quicker to provide a better experience for your registrants.

NOTE: You can also change the field labels. For example, you can change the label for 'Zip' to read 'ZIP Code' or 'Postal Code'.

As part of the fully customizable features, we have added a new feature to add multiple/ custom genders for registrants to choose from. If you select "All", all the options will be visible. If you select "Selected", you can choose which genders you want to appear on the registration tool.

Options

After setting the form appearance for attendee and contact information, the Options section lets you set other options for how this tool will function.

You should have set option 1, the link to the Event Record, in an earlier step.

NOTE: If you publish the tool to Engage and members access the tool through Engage, Engage will use the information in their Individual Record to complete the Attendee section.

Option 3 - Available Activities

Web Ministry Tools

3) Choose the activities available for registration at this event

Active	Price	Description	Maximum Quantity per Registrant	Activity Capacity	Notes
Outdoor Activity <input type="checkbox"/> Display category header, Don't display Category Name <input type="checkbox"/> Display custom header			<input type="checkbox"/> Registrant can only select one activity in this category <input checked="" type="checkbox"/> Registrant must select at least one activity in this category		Instructions: Please choose one or more event(s) that you would like to participate in.
<input checked="" type="checkbox"/>	\$0.00	Hay Rides	1	100 - Allow Overbooking	<input checked="" type="radio"/> No notes <input type="radio"/> Notes are optional <input type="radio"/> Require notes
<input checked="" type="checkbox"/>	\$0.00	Apple Picking	1	100 - Allow Overbooking	<input checked="" type="radio"/> No notes <input type="radio"/> Notes are optional <input type="radio"/> Require notes
<input checked="" type="checkbox"/>	\$5.00	Horseback Riding	1	20 - Allow Overbooking	<input checked="" type="radio"/> No notes <input type="radio"/> Notes are optional <input type="radio"/> Require notes
<input checked="" type="checkbox"/>	\$10.00	Hot Air Balloon Rides	1	20 - Allow Overbooking	<input type="radio"/> No notes <input checked="" type="radio"/> Notes are optional <input type="radio"/> Require notes
Food <input checked="" type="checkbox"/> Display category header, Don't display Category Name <input type="checkbox"/> Display custom header			<input type="checkbox"/> Registrant can only select one activity in this category <input type="checkbox"/> Registrant must select at least one activity in this category		Instructions: Dinner and Dessert are being provided by the Orchard at a minimal fee. The meal includes barbecued meats, baked beans, fresh salad, & hot apple pie!
<input checked="" type="checkbox"/>	\$5.00	Dinner Voucher	1	100 - Allow Overbooking	<input type="radio"/> No notes <input checked="" type="radio"/> Notes are optional <input type="radio"/> Require notes

<< Back Save

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For each activity, check the box in the leftmost column to have that activity appear as option on the event registration form. For each activity, you can also set a maximum quantity that each attendee or registrant can select. For example, if registrants can order up to three T-shirts in any given size, set the maximum quantity to three.

If you are limited by space or inventory for a given activity, you should set the Capacity on the event's Activities tab and leave 'Allow Overbooking' unchecked'. If this box is checked, the tool will allow a person registering to choose the activity, even if capacity has been reached.

A text field for notes can be included with each activity on the registration form. If notes are entered, these will be stored in the Notes field on the Activities tab of the Event Registration record that is created. For each activity, you can specify whether no notes can be entered, notes are optional, or notes are required.

Categories

Note that the activities in the tool are grouped according to the categories that were specified for the activities on the Event Record. This demonstrates why it is important to begin with the end in mind, and to be thinking about how you want the registration form to appear when you are creating the Event Record in CDM+. For each category, you have three heading options:

Display category header: This option will simply show the Category name as it is defined in the CDM+ Master Coding System in a heading above the activities in this category.

Don't display Category Name: Choosing this option will result in just a list of available activities with no heading.

Display custom headers: This option will allow you to enter alternate text to display in the header for a category of activities.

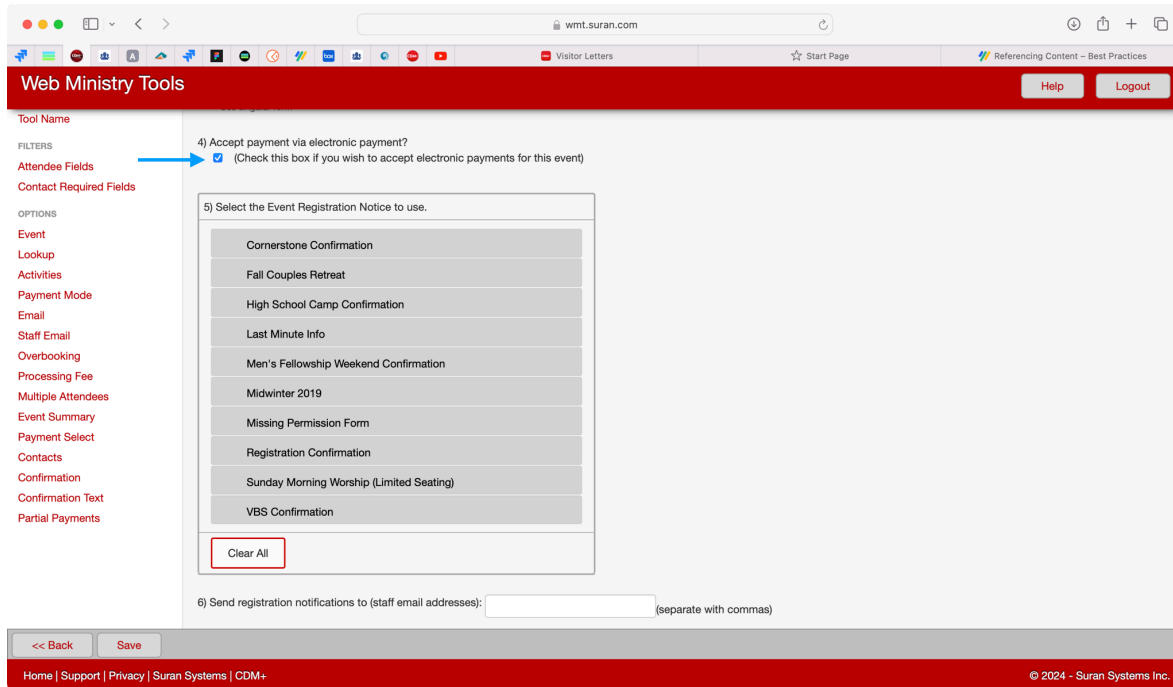
For each category, you may choose to limit a registrant's choice to one activity and/or force registrants to choose at least one activity. If you do not check '*Registrant must select at least one activity in the category*', although he or she would be registered for the event, a person could click through the Activities window in your tool without registering for an activity. Checking both boxes will force registrants to choose one, and only one, activity within the category.

To include instructions for the category, simply type them in the box below Instructions. The text you enter will appear below the category header on the Activities page of your registration tool.

If you need to use a different term or heading for the activities associated with your event, you can enter that text as an **Alternate name for "Activity"**.

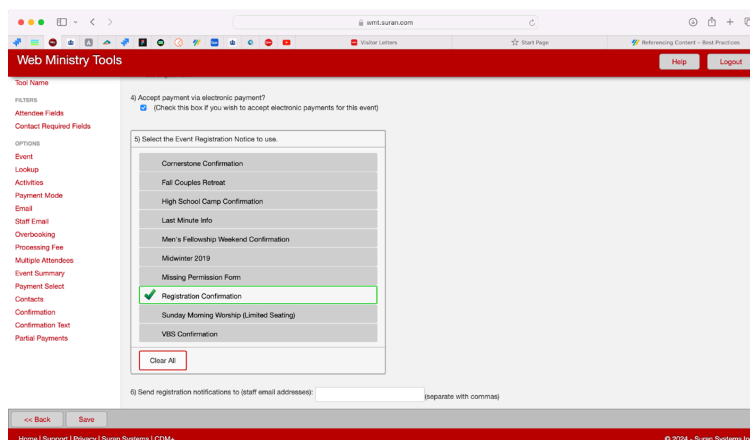
Option 4 - Payment Options

Check the box if you have a merchant account and you plan to accept payments online with Event Registration Web Ministry Tool. You will set the types of payment to accept in Option 11.

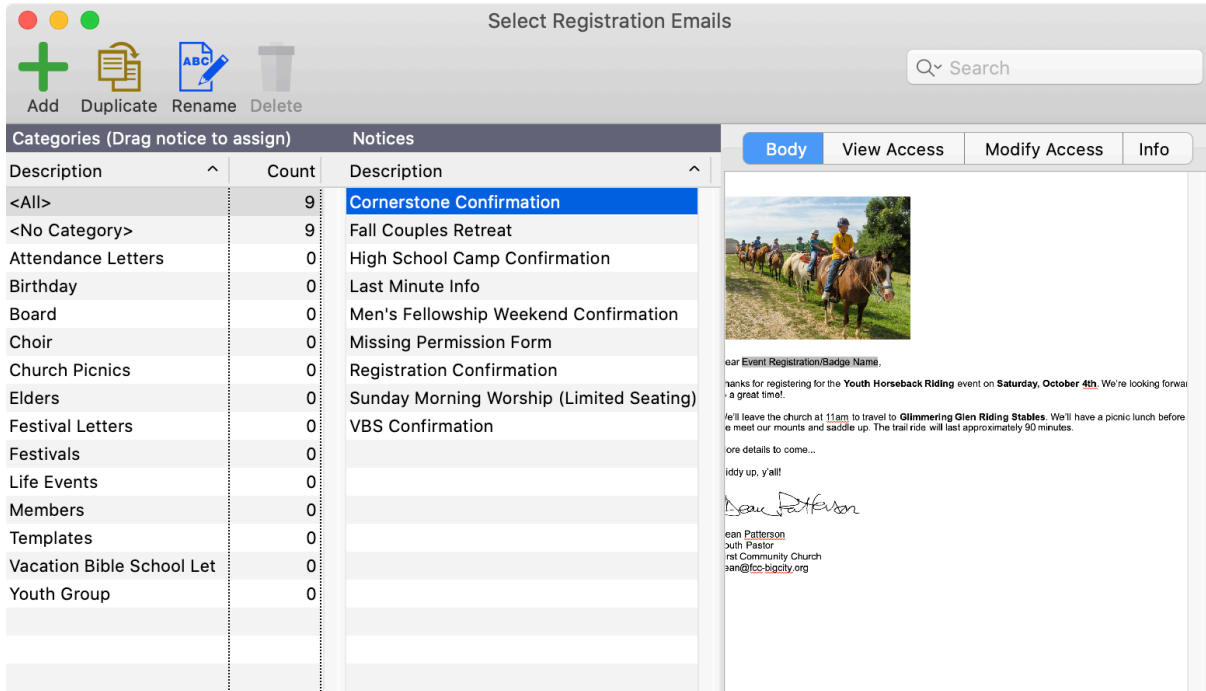


Option 5 - Email Confirmation

You can choose to have the Event Registration Tool send a confirmation email once a registration is completed. The tool will display all Registration Email notices from your CDM+ database. Choose the confirmation email from this list in the Web Ministry Tool.

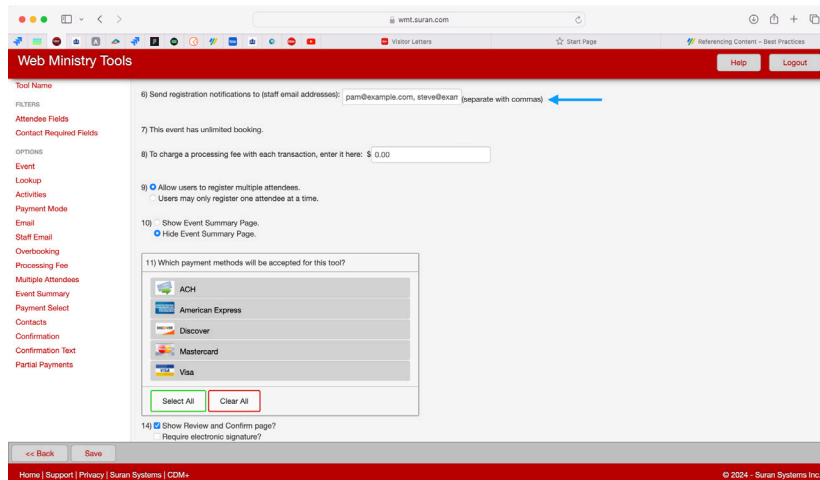


You will need to create the confirmation email at **Reports ► Event Registration Reports ► Notices ► Registration Emails** before creating the Web Ministry Tool.



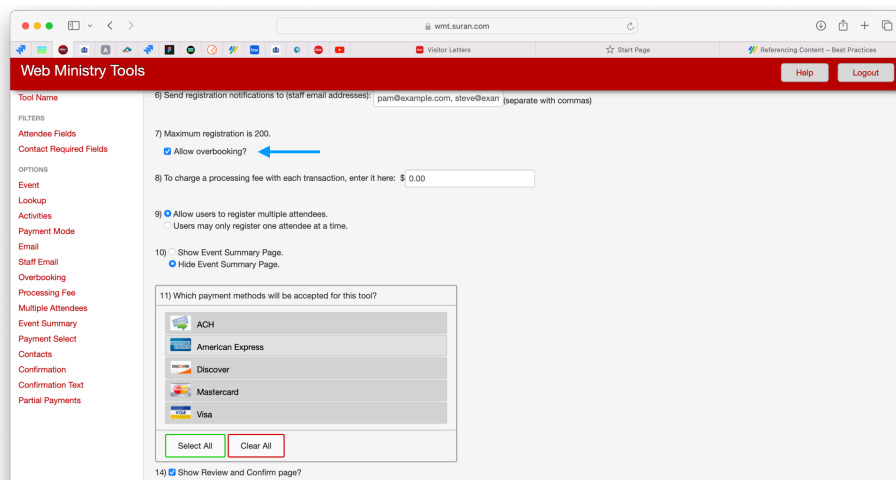
Option 6

Opt to send registration notifications *to staff* by entering email address(es) in the space provided. Separate addresses with commas. An email will be sent to each staff member with an address in this field each time someone registers for the event.



Option 7

Opt to **allow overbooking** for the event. Check the box if you would like to allow overbooking for the entire event. If not, make sure the box is empty. If the event has been set up with unlimited capacity in CDM+, there will not be a box to check.



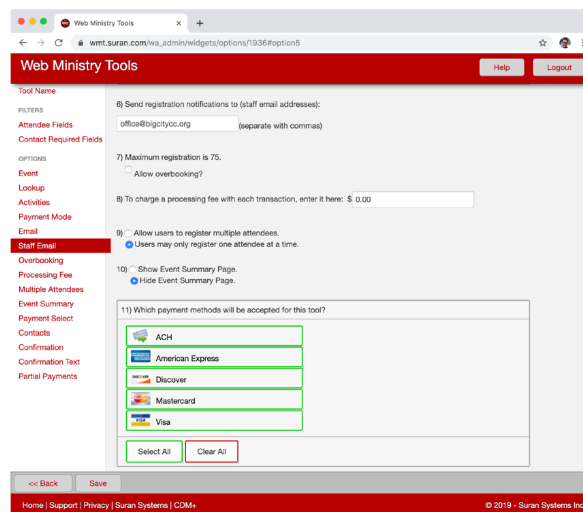
The screenshot shows the 'Web Ministry Tools' configuration page. On the left is a sidebar with various tool categories. The main area displays several configuration options:

- 6) Send registration notifications to (staff email addresses): pam@example.com, steve@example.com (separate with commas)
- 7) Maximum registration is 200. Allow overbooking? (indicated by a blue arrow)
- 8) To charge a processing fee with each transaction, enter it here: \$ 0.00
- 9) Allow users to register multiple attendees. Users may only register one attendee at a time.
- 10) Show Event Summary Page. Hide Event Summary Page.
- 11) Which payment methods will be accepted for this tool? (Listed: ACH, American Express, Discover, Mastercard, Visa)
- 14) Show Review and Confirm page?

Option 8

If you elect to charge a *processing fee*, enter the amount here.

Please note that when adding a processing fee that it is a single amount added to the entire registration total. It is not calculated based on how many attendees register. If you set the processing fee as \$5.00 and one person registers, they will be charged \$5.00. If 10 people register, they still will only be charged a \$5.00 processing fee. If you're trying to recoup some of the expense associated with taking online transaction, you may be better served by increasing the cost of the event or its activities. .



This screenshot shows the same configuration page as above, but with the 'Allow overbooking?' checkbox unchecked. The processing fee remains at \$0.00. In the payment methods section, ACH, American Express, Discover, Mastercard, and Visa are all selected, indicated by green checkmarks in the input boxes.

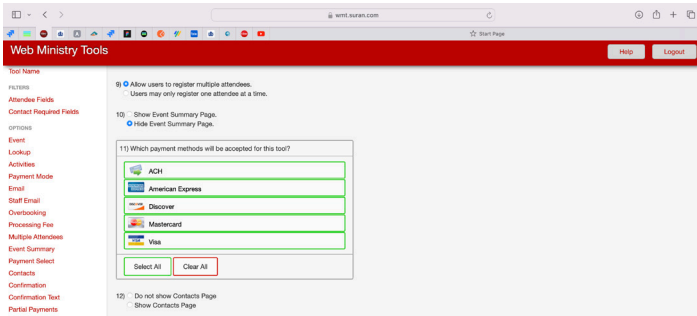
Options 9 through 17

9. Choose whether or not to allow **multiple attendee registrations** in the same session. Allowing this feature saves registrants time, and means that fees for attendees registered together can now be paid in one online transaction. Families will appreciate the ability to enter address information just once by choosing "Address Same As . . ." when adding attendees after the first.

10. Choose whether or not to show the **Event Summary Page**. This page of the tool appears before the rest of the tool and provides event details prior to the registration process.

11. Choose the **payment types** for this tool. You may opt to only accept certain types of credit cards or ACH debiting of Checking and/or Savings bank accounts.

12. This option, **whether or not to show a contacts page and how many contacts to require** per registrant, will only appear for events already designated Youth/Camp events in CDM+ Event Registration

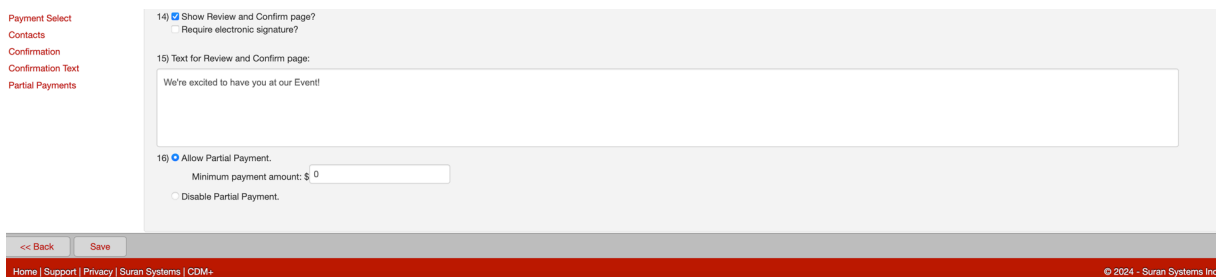


14-15. This option, whether or not to show a **confirmation page** and, if so, whether to require an electronic signature, is especially useful for Youth/Camp events. By clicking the electronic signature check box, the registrant signs the “agreement.” You may customize the text of the agreement to suit your situation.

16. Allow Partial Payment. Use this option to allow registrants to make partial payments and to set the minimum amount for any partial payments made.

17. CDM+ Regional program users have the option of showing a church selection drop list of all churches marked as “Congregation” in their CDM+ Regional Church Records.

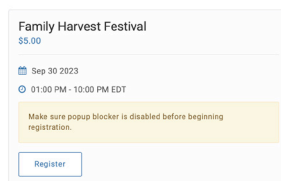
Once you have set all the options for your tool, click **Save**. To prevent losing work as you are developing the tool, you should click Save at various points in the process, for example, after setting up the activities.



Testing Your Single Event Registration Tool

Before you make your new Single Event Registration Tool available, test the tool.

Click **Publish** and then the **Preview Link** that appears at the bottom of the page. A preview of the **Launcher** appears.



Click the the Register button in the Launcher to proceed to the event summary screen, or to the Attendee Information screen if you elected not to display the event summary.

NOTE: When testing your Web Ministry Tool, we recommend that you testing with payments disabled. Once you are ready to publish, go back and enable the payments option.

High School Camp [TEST MODE] Cost: \$350.00

Attendees / Contacts / Activities / Payment / Confirmation / Completion

Attendee Information

Select Individual

Fields marked with a * are required.

PERSONAL INFORMATION

First Name* Last Name*

Area

E-Mail Address*

Phone Number*

ADDRESS INFORMATION

Address Line 1* Address 2 Label

City*

State*

Zip*

OTHER INFORMATION

Gender*

Male Female

Grade*

Birthday*

July 5 2002

Next Step >>

Fill out the Fields, and then click "Next Step" to proceed. If this is a Camp/Youth Event, it will go to the Contact Information window.

High School Camp [TEST MODE] Cost: \$350.00

Attendees / Contacts / Activities / Payment / Confirmation / Completion

Contact Information

Remove Contact

Fields marked with a * are required.

First Name Last Name

Address Line 1 Address Line 2

City

State

Zip Code

Phone Number

E-Mail Address

Notes

Primary Contact For

Parent Guardian Other

Primary Contact For

Stephanie Delvecchio

Secondary Contact For

Stephanie Delvecchio

Add Contact

<< Previous Step

Next Step >>

The Contacts function in the Single Event Registration WMT is very flexible. It accommodates multiple contacts; always a good idea, but especially important for blended families. Each contact has a **Notes** field, allowing the registrant to give any info he/she thinks is important.

Enter all the contact information and click **Next Step**.

The **Activities** window appears.

The screenshot shows a web interface for 'High School Camp [TEST MODE]' with a total fee of \$350.00. The breadcrumb trail is 'Attendees / Contacts / Activities / Payment / Confirmation / Completion'. The main content is a table with columns for 'Activity', 'Selection and Notes', 'Fee', and 'Subtotal'. The table is divided into two sections: 'Medical Alerts' and 'Food Allergies'. Each row in the table has a checkbox and a message box that says 'You must select this activity'.

Activity	Selection and Notes	Fee	Subtotal
Medical Alerts <i>Please indicate medications, allergies, or other medical conditions.</i>			
Allergic to Penicillin	<input type="checkbox"/>		
Allergic to Latex	<input type="checkbox"/>		
Medications	<input type="checkbox"/>		
Food Allergies			
Gluten	<input type="checkbox"/>		
Dairy	<input type="checkbox"/>		
Soy	<input type="checkbox"/>		
Peanuts	<input type="checkbox"/>		

Here the registrants enter information for the various activities created in the Event Registration record and specified in the Web Ministry Tool.

Click **Next Step** to proceed to payment.

The **Payment** window appears.

The screenshot shows a web interface for 'Summer Workshops [TEST MODE]'. The 'Partial Payment' section has three radio buttons: 'Pay in full (\$100.00)', 'Pay \$ 5 (\$5 required)', and 'Pay later'. Below this is the 'Billing Information' section, which includes a dropdown for 'Attendees', and input fields for 'First and Last Name', 'Street Address', 'City', 'Country', 'State', and 'Zip'. The 'Payment Method' section has two radio buttons: 'Pay by Credit Card' and 'Pay by Bank Account'. Below this are logos for VISA, MasterCard, DISCOVER, and AMERICAN EXPRESS, followed by a 'Credit Card Number' field and 'Exp. Month', 'Exp. Year', and 'CVV' fields. A footer note provides contact information for Webinars.

Click Next Step. A successful test brings up the Registration Complete window, which may be printed.

If, in options, you set up an **Email Confirmation Notice** for the tool, an email will be sent to the email address you entered for testing purposes. If you entered email address(es) for staff, who should be notified of registrations, they will receive a notice, too.

The Single Event Registration Tool and CDM+

One of the major advantages of the Single Event Registration Tool is that online registrations and payments are automatically entered in CDM+ Event Registration.

This screenshot shows the 'Registration Entry' window for a completed registration. The 'Registrant' tab is active, displaying the following information:

- Registrant List:**

Begin	End	Description	Last	First	Date Registered
ep 30 2023	Sep 30 2023	Family Harvest Festival	Disney	Susan	Sep 13 2023 12:00 PM
ec 7 2022	Dec 7 2022	Christmas Cantata	Fawn	Janice	Sep 13 2023 3:31 PM
ct 2 2022	Oct 2 2022	Fall 2022 Family Retreat	Lawrence	Cacao	Sep 13 2023 3:39 PM
ep 22 2022	Sep 22 2022	Gala 2022	Rouge	Coral	Sep 14 2023 10:53 AM
- Registrant Details:**
 - Registration Number: 5
 - Date Registered: Sep 13 2023 3:31 PM
 - Registration Canceled (*):
 - Date Canceled:
 - First Name: Janice
 - Last Name: Fawn
 - Badge Name: Janice
 - Gender: Female
 - Address: 123 Pine Rd, Lexington, KY 40509
 - Phone: (859) 467-8913
 - Email: janicefawn@email.com
- Event Fees:**
 - Event Fee: 5.00
 - Act. Fees: 17.00
 - Payments: 22.00
 - Balance Due: 0.00

A completed registration

This screenshot shows the 'Registration Entry' window with the 'Contacts' tab active. It displays contact information for two contacts:

- Contact 1:**
 - Relationship: Parent
 - First Name: Jonathan
 - Last Name: Fields
 - Address: 908 Lexington St., Big City, KY 40123
 - Phone: 606.555.6040
 - Email: unch@gmail.com
- Contact 2:**
 - Relationship: Parent
 - First Name: Charity
 - Last Name: Fields
 - Address: 908 Lexington St., Big City, KY 40123
 - Phone: (606) 798-4367
 - Email: unch@gmail.com

The registrant's contact information

This screenshot shows the 'Registration Entry' window with the 'Activities' tab active. It displays a list of activities and their associated fees:

Activity	Fee	Registered	Description	Qty	Fee	Total	Notes
Food	7.00	2/100					
Dinner Voucher	5.00	2/100					
Dessert Voucher	2.00	2/100					
Outdoor Activity	15.00						
Hay Rides	0.00	2/100					
Apple Picking	0.00	2/100					
Horseback Riding	5.00	0/20					
Hot Air Balloon Ride	10.00	0/20					
T-shirt - S	5.00	1/25					
T-shirt - SM	10.00	1/25					
T-shirt - M	10.00	1/25					
T-shirt - L	10.00	0/25					
T-shirt - XL	10.00	0/25					
T-shirt - Custom Sil	12.00	0/0					

Activities

This screenshot shows the 'Registration Entry' window with the 'Payments' tab active. It displays a list of payments:

Date	Amount	Check/Credit Card Number	Notes	Posted To Ledger
Sep 13 2023	5.00	4978	Dinner Voucher	
Sep 13 2023	2.00	4978	Dessert Voucher	
Sep 13 2023	10.00	4978	T-shirt - M	
Sep 13 2023	5.00	4978	Event Fee	

Summary: Add Payment: 0.00, 5.00 Act. Fees: 17.00, Payments: 22.00, Balance Due: 0.00

Payments

Publishing your tool

When you're ready to receive registrations, you'll need to publish the tool.

NOTE: If your tool accepts payments, remember to switch the payment mode back to live before accepting registrations. Otherwise, registration payments will not cause any funds to transfer from the registrant to your organization.

Publish this tool using these options:

Embedded HTML

Copy and paste this HTML tag into your website. This will embed the tool directly onto your website.

```
<script type="text/javascript" src="https://wmt.suran.com/tool?guid=7b0168aa2ee811e9918dc03d79cc1915"></script>
```

Example HTML Link

Copy and paste this HTML tag into your website. This will provide a simple html link that will open your tool in a new window or tab.

```
<a target="_blank" href="https://wmt.suran.com/tool?guid=7b0168aa2ee811e9918dc03d79cc1915">New Single Event Registration Tool</a>
```

Direct Link

This is an absolute link to your tool that can be copied and used to attach to a button or image on your site. This can be useful for Content Management Systems.

```
https://wmt.suran.com/tool?guid=7b0168aa2ee811e9918dc03d79cc1915
```

Preview Link

Note: that this link will be displayed from inside the Web Ministry Tools Website.

```
https://wmt.suran.com/main/preview/8121
```

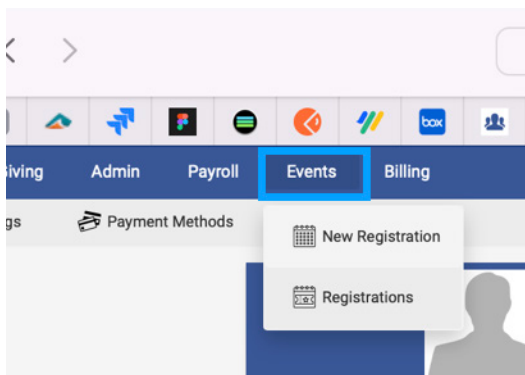
Publish to Engage

Publish this tool to Engage. Members will be able to register for this event through Engage.

In Web Ministry Tools, click the Publish link for your tool. Here you can use a direct link to share the registration on your website, social media, or in an email. You can also use the embed link to display the tool inline on your website.

You can also download a QR code that opens the registration tool. This is a great way to promote the event on signs, bulletins, newsletters, and posters.

If you want members to register for the tool via Engage, check the option to Publish to Engage. In Engage, members will now see Events under the navigation menu.



Family Harvest Festival

Saturday Sep 30 2023

1:00 PM EDT - 10:00 PM EDT

[Register](#)

Using the Event Registration Tool with Engage

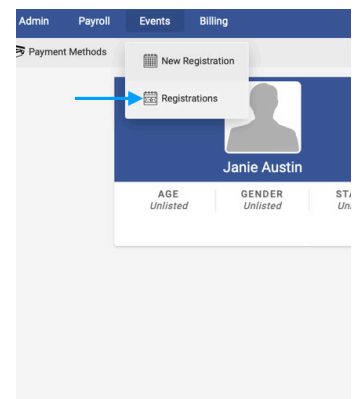
The Event Registration Web Ministry Tool can be used with Engage to allow members to register from their Engage account. When a member registers from Engage, Engage uses the information from their Individual Record to complete the Attendee page.

Members can also use the 'My Registrations' link in Engage to review all events that they have registered for. If the event has a balance due, the total fees, payments to date, and the outstanding balance will be shown along with a button to 'Make a Payment'.

Making Payments

Members can log into Engage and make payments on their registrations that carry a balance. These registrations can come from an online tool or be manually entered into CDM+. As long as the registration is linked to the same individual record as the Engage user, it will appear in Engage.

Log into Engage and go to **Events ► Registrations** from the navigation menu.



Registrations will appear and if there is a balance, a **Make Payment** button will be available.

Summer Workshops

Tuesday Jul 30 2024

9:00 AM EDT - 5:00 PM EDT

Total Fees: \$300.00

Payments: \$100.00

Balance: \$200.00

[MAKE PAYMENT](#)

Click Make Payment and you can pay the full amount or a specific amount.

Payment

1. AMOUNT

2. PAYMENT

3. REVIEW

PAY IN FULL (\$300.00)

PAY SPECIFIC AMOUNT

CONTINUE

COMODO SECURE

Follow the steps to complete the payment. If the Engage account has saved payment methods for giving or billing, they can be used to make the payment.

Once the payment is made, a payment will appear on the registration record in CDM+.

Adding Registrations for an Event

► Program ► Event Registration ► Registration Entry

Registration Entry

Events: Show Closed Events Registrants for Family Harvest Festival (5 Current, 0 Cancelled)

Begin	End	Description	Last	First	Date Registered
Sep 30 2023	Sep 30 2023	Family Harvest Festival	Disney	Mike	Sep 13 2023 12:00 PM
Dec 7 2022	Dec 7 2022	Christmas Cantata	Disney	Robin	Sep 13 2023 12:00 PM
Sep 30 2022	Oct 2 2022	Fall 2022 Family Retreat	Disney	Susan	Sep 13 2023 12:00 PM
Sep 22 2022	Sep 22 2022	Gala 2022	Fawn	Janice	Sep 13 2023 3:31 PM

Individual Record

Janice Fawn
123 Pine Rd
Lexington, KY 40509

Phone Number:

Event Fee: 5.00
Act. Fees: 0.00
Payments: 0.00
Balance Due: 5.00

Source: Registration Entry
Digital Signature: n/a

Date Registered: Sep 13 2023 3:31 PM Registration Number: 5
Registration Canceled (*) Date Canceled:

First Name: Janice
Last Name: Fawn
Badge Name: Janice
Gender: Female

Override Individual Address Record MapQuest


Address: 123 Pine Rd

City: Lexington State: KY Zip Code: 40509

Country:

Phone (859) 467-8913 Email: janicefawn@email.com

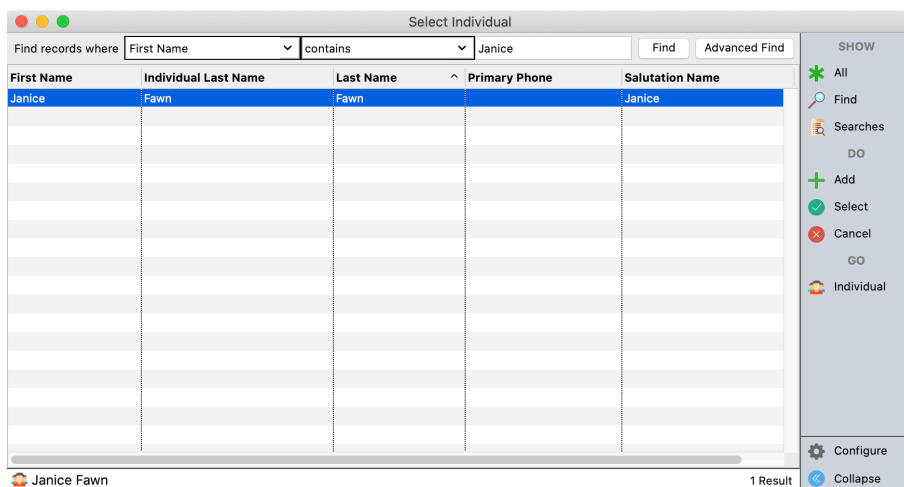
Add Multi-Add Change Delete Print Address Individual Cancel Save

 If you already have at least one registration entered for an event, you can click the Registrations jump button on the Event Records window to quickly open the Registration Entry window for that event.

On the Registration Entry window, you can double-click an event in the listing to open the Event Record window.

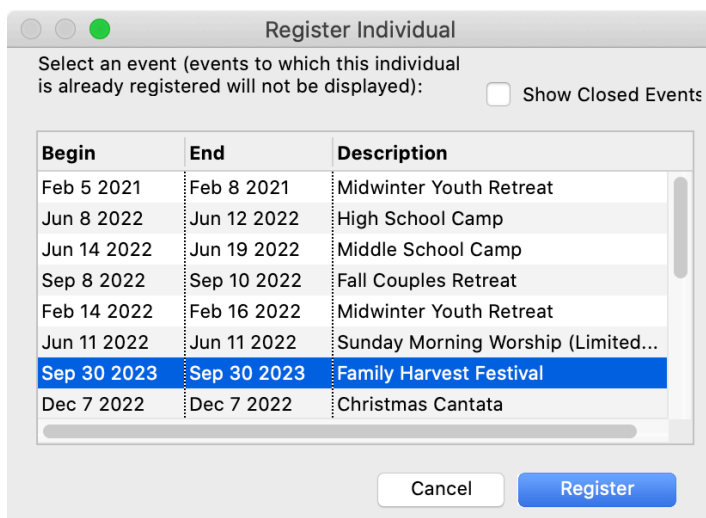
The Registration Entry window displays Events in the Events Listing pane; click once to highlight the Event to which you are adding registrations. Persons already registered for the chosen Event will display in the Registrant listing pane on the right. Click Add or Multi-Add and complete the registrant information.

If the **Skip Individual Record lookup when adding a new registration** box is unchecked on the Event Record, the Select Individual window will open when you begin adding a new registration. Otherwise, you can click the Select Individual button to register a person from the Membership program.



Use a **Find** on the Select Individual window to locate the person, click **OK**, and their Individual Record information will load in the Registration Entry window.

If applicable, you may Override Individual Address record and enter another address for the registrant.



You can also begin a new registration for a person in the CDM+ Membership program from their Individual Record. In Individual Records, find the record for the person you want to register, and then click on the **Register** button from the sidebar. Select the event from the Register Individuals window that opens.

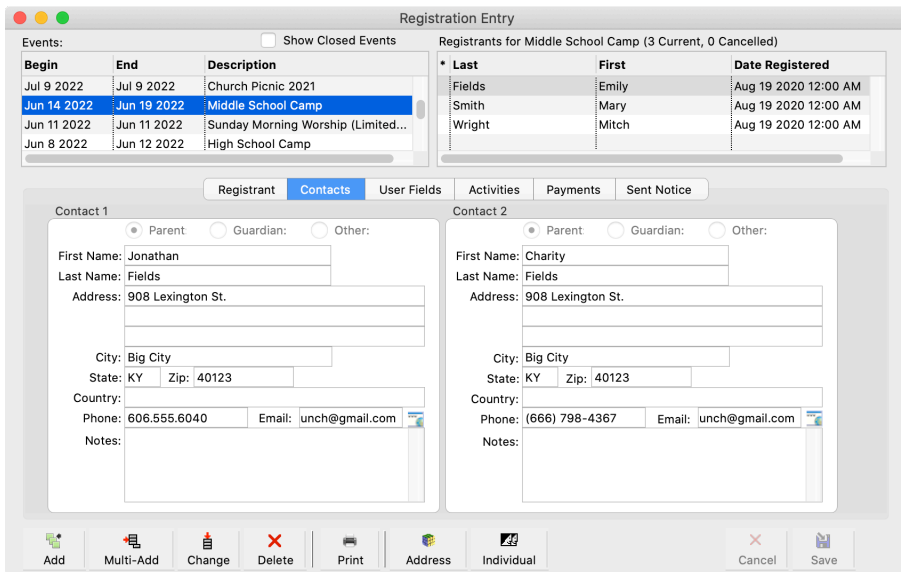
To register a person **NOT** in the Membership program:

- Click **Add** or **Multi-Add**.
- If the Select Individual window opens, click **Cancel**.
- Complete the registrant's information on the Registration pane.
- Click **Save**.

Entering Contact Information (Youth/Camp events only)

►Program ►Event Registration ►Registration Entry ►Contacts

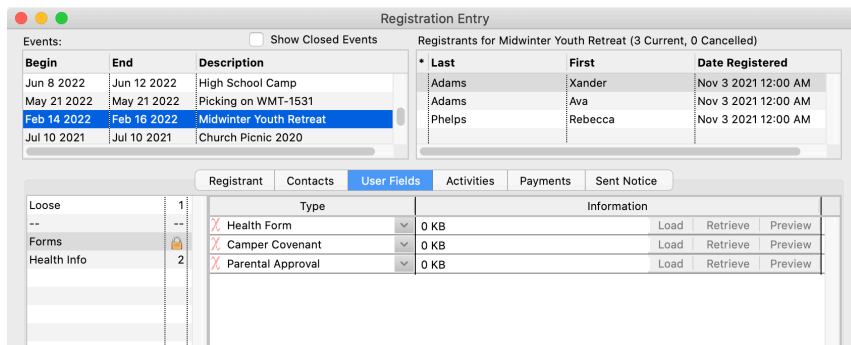
Enter the contact information for this registrant. If the individual is selected from the Membership program, the name of the primary contact, pulled from the family Address Record, will be automatically loaded as Contact 1. An additional Contact may be added. A Notes field is available for each Contact.



Entering User Fields

► Program ► Event Registration ► Registration Entry ► User Fields

This User Fields tab functions the same as the User Fields tabs on Address and Individual Records (see the Getting Started – Membership section of this manual). Codes can be "Loose" or assigned to User Fields Sets to group information. For example, the Forms set includes Health Form, Parental Consent, and Camper Covenant.



User Fields Sets must be created in the **Master Coding System** before you can add Codes.

Codes not assigned to a Set will appear under "Loose" on the User Fields tab. Once created, a Code can be moved to a different set in the Master Coding System.

To enter information for a registrant, select either Loose or a Set on the left and either choose an existing Code from the drop list under Type or create a new Code "on-the-fly" by typing in the field.



This example shows the use of raw data user fields to store scans of completed forms. You can also create text fields, date fields, and yes/no fields. The content of text and yes/no fields can be included on name badges and custom listings. User fields are also included in the Master List Detail Report.

Registering Persons for Activities

► Program ► Event Registration ► Registration Entry ► Activities

Begin	End	Description	Last	First	Date Registered
Sep 30 2023	Sep 30 2023	Family Harvest Festival	Disney	Robin	Sep 13 2023 12:00 PM
Dec 7 2022	Dec 7 2022	Christmas Cantata	Disney	Liz	Sep 13 2023 12:00 PM
Sep 30 2022	Oct 2 2022	Fall 2022 Family Retreat	Fawn	Janice	Sep 13 2023 3:31 PM
Sep 22 2022	Sep 22 2022	Gala 2022	Lawrence	Cacao	Sep 13 2023 3:39 PM

Activity	Fee	Registered	Description	Qty	Fee	Total	Notes
Food	7.00		Dinner Voucher	1	5.00	5.00	
Dinner Voucher	5.00	1/100	Dessert Voucher	1	2.00	2.00	
Dessert Voucher	2.00	1/100	Hay Rides	1	0.00		
Outdoor Activity	15.00		Apple Picking	1	0.00		
Hay Rides	0.00	1/100	T-shirt - M	1	10.00	10.00	
Apple Picking	0.00	1/100					
Horseback Riding	5.00	0/20					
Hot Air Balloon Ride	10.00	0/20					
T-Shirt Size	52.00						
T-shirt - SM	10.00	0/25					
T-shirt - M	10.00	1/25					
T-shirt - L	10.00	0/25					
T-shirt - XL	10.00	0/25					
T-shirt - Custom Si	12.00	0/0					

The Activities window is divided into Event Activities and Assigned Activities. The Registered column shows the number of people Registered for an activity followed by the Activity Capacity. Double-click an Activity to register an attendee for it. By default, the Quantity will be 1 and the Fee amount will be as assigned in the Event Record, but either or both may be changed here if needed. A Notes field is available for each Activity.

Recording Payments

► Program ► Event Registration ► Registration Entry ► Payments

The Fees section at the bottom of the Payments tab summarizes the Fees and Payments recorded and totals a Balance Due amount. This summary is also displayed on the Registrant tab.

Date	Amount	Check/Credit Card Number	Notes	Posted To Ledger
Sep 13 2023	5.00	4978	Dinner Voucher Source: Registration Entry	
Sep 13 2023	2.00	4978	Dessert Voucher Source: Registration Entry	
Sep 13 2023	10.00	4978	T-shirt - M Source: Registration Entry	
Sep 13 2023	5.00	4978	Event Fee Source: Registration Entry	

Add Payment 0.00 5.00 Act. Fees: 17.00 Payments: 22.00 Balance Due: 0.00

To add a payment, click the **Change** button, then the **Add Payment** button and complete the fields: Date, Amount, Check/Credit Card Number, and Notes. The Fees section will automatically be updated.

For security reasons, we strongly suggest you NOT include complete credit card information. Note the type of card (Visa, MasterCard, etc.) and the last 4 digits of the number to reference it.

If a registration was entered and paid for via online registration, the payment information will be automatically entered and the Source will show as Engage instead of Registration Entry.

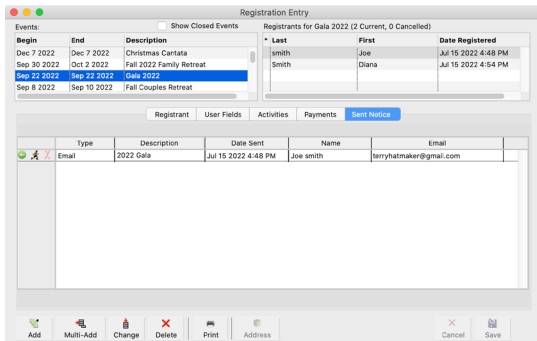
Date	Amount	Check/Credit Card Number	Notes	Posted To Ledger
Jun 11 2024	5.00	*****1111	Transaction ID: 100112542 Source: Engage	
Jun 11 2024	95.00	*****1111	Source: Engage	

NOTE: A Registration Entry with payment made via online registration cannot be deleted. To exclude the person from reports, click the **Registration Cancelled (*)** checkbox on the registration. This marks the name with an asterisk in the list of registrants and adjusts the total registrations count. Reports give you the option not to include cancelled registrations.

Viewing Sent Notices

►Program ►Event Registration ►Registration Entry ►Sent Notice

The Sent Notice tab lists both the Registration Notices and Activity Notices sent to this registrant for this Event.



NOTE: Registrations made online that trigger an automatic confirmation email, will display a Sent Date of the date the registration was made.

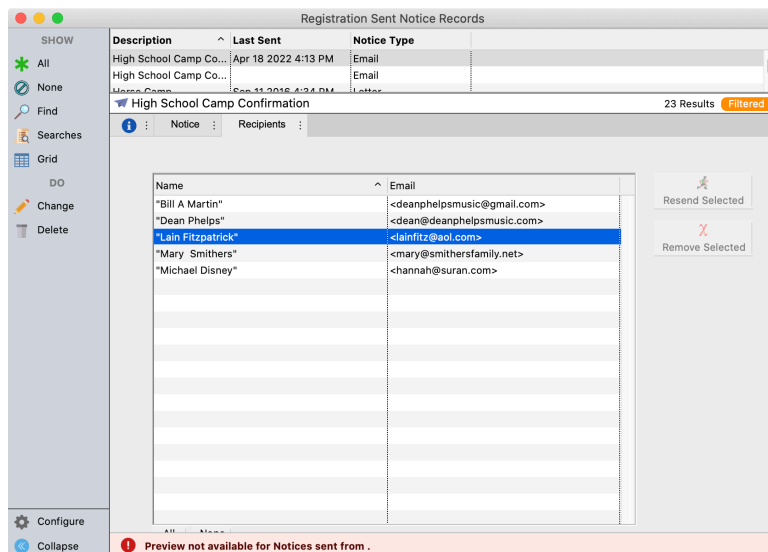
- Click the running man icon next to a notice to send it to just this registrant again.
- Click the round green icon next to a notice to open it in the Registration Sent Notices window.



Email Notices are automatically saved. However, if you want the *option* to save Letter and Card Notices, you must set it on the CDM+ System Preferences window (►CDM+(macOS)/File(Windows) ►Preferences ►CDM+ System ►Event Registration ►Notices).

Registration Sent Notices

►Program ►Event Registration ►Registration Sent Notice Records or Activity Sent Notice Records



The Notices tab displays detail of highlighted Registration or Activity Notice.

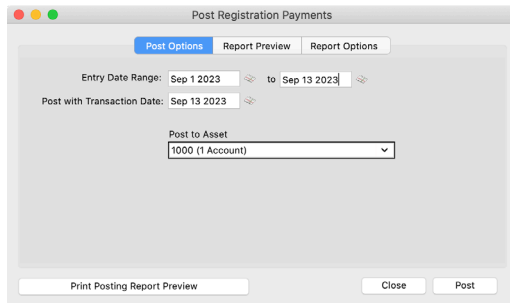
The Recipients tab lists the registrants to which the highlighted Registration or Activity Notice was sent. You may re-send notices by selecting all or some recipients on the list and clicking the Resend Selected button.

NOTE: If you send the same email, such as a registration confirmation, multiple times, you will see it appear in the list repeatedly displaying the date and time it was sent. You can use this to know what date range to set when sending the email notice again to avoid sending it to a registrant more than once.

Post Payments to Ledger

If an income account was entered in the Payment Account field on the Event Record, the payments made for this event may be posted to the Ledger (this is optional). If you are using online registrations with electronic payment, you'll want to assign the proper expense account for the credit card or ACH fees in the Fee Account field.

► Program ► Event Registration ► Post Payments to Ledger

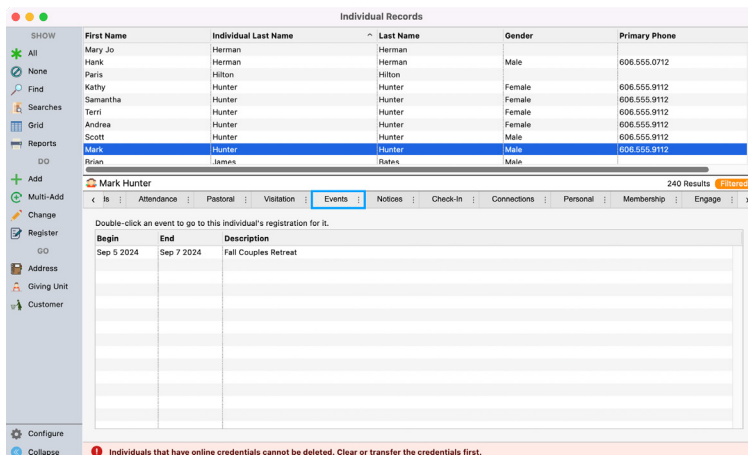


If you are using CDM+ Accounting, you can post the deposit of cash and check payments directly to the ledger. Choose the date range for the payments to be posted, enter a transaction date, and select the asset account for posting the payments. Use the Report Preview tab, or use the Print Posting Report Preview to review the action prior to posting. Click **Post** when you are satisfied the posting will be correct.

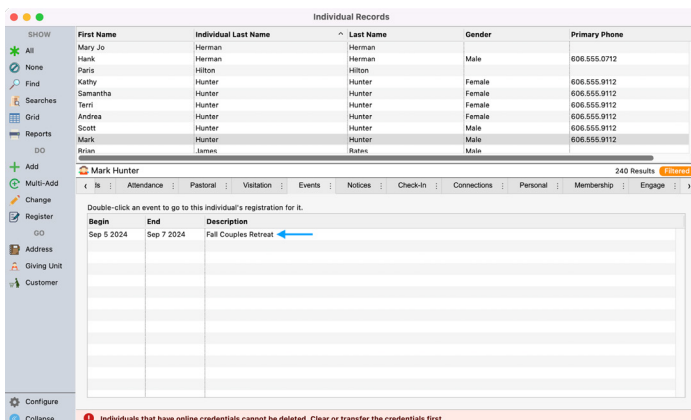
Viewing Historical Event Registration for Members

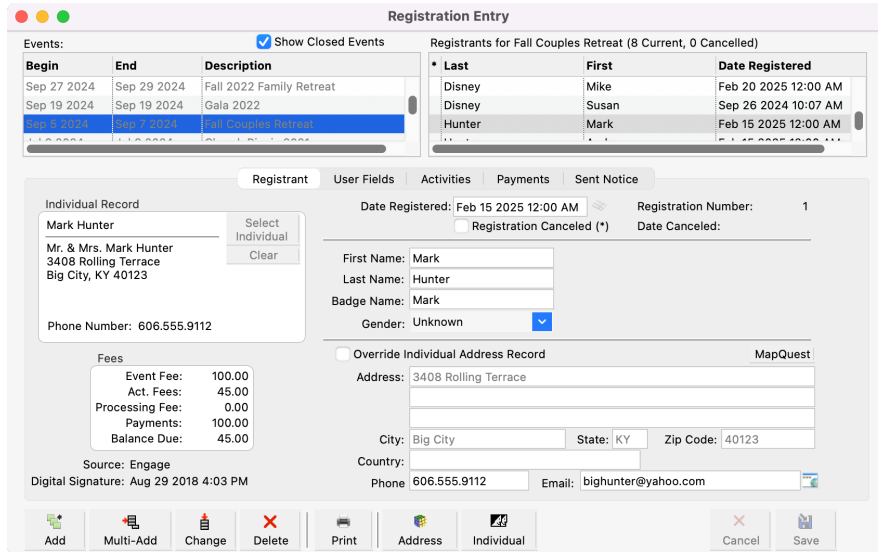
► Program ► Membership ► Individual Records ► Events

You can see historical event registrations for members in CDM+ Membership.



If you double-click on the Event's description on the Individual record, you'll be taken to that individual's registration entry.



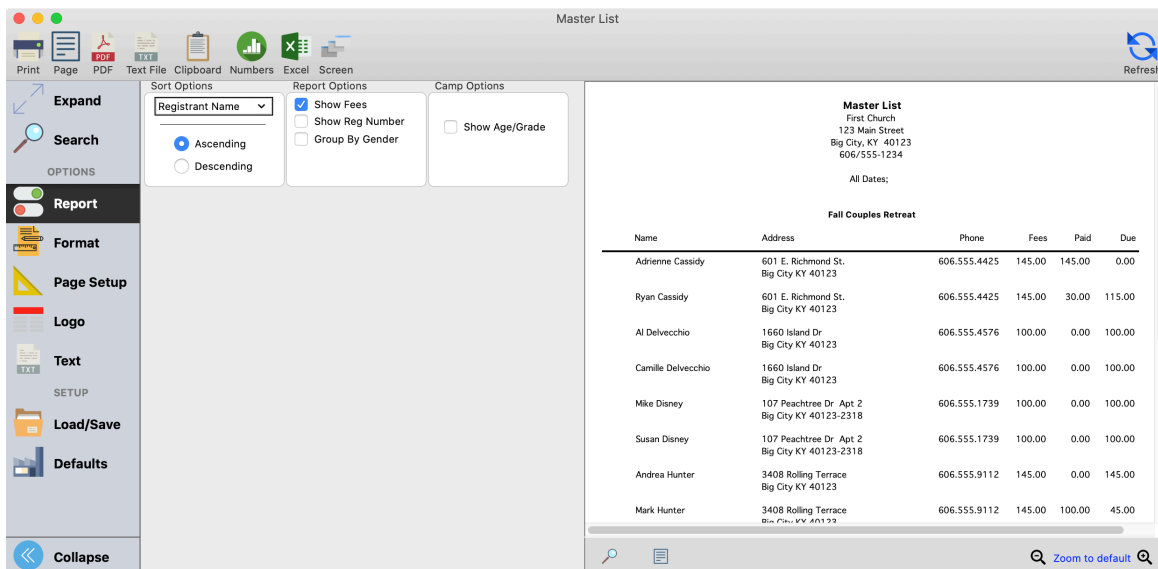
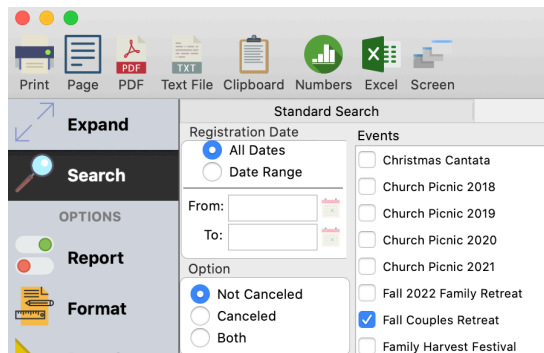


Registration Reports

Master List

► Reports ► Event Registration Reports ► Listings and Exports ► Master List

The Master List report includes the registrant's Name, Address, and Phone. You can optionally include Age, Grade, Fees, Payments, and Amount Due.



Master List Detail

► Reports ► Event Registration Reports ► Listings and Exports ► Master List Detail

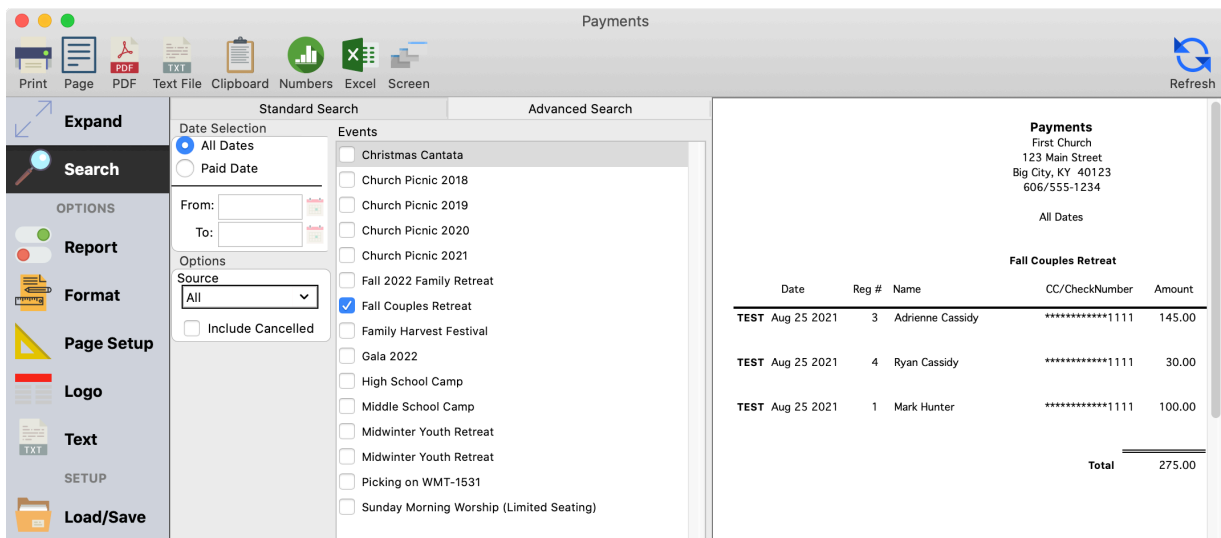
This version of the Master List report includes the information on the Master List report, plus any Activity registration and detailed payment information. User Fields, Contact, and Activity Notes are optional.

Master List Detail																									
First Church 123 Main Street Big City, KY 40123 606/555-1234																									
All Dates;																									
Fall Couples Retreat																									
Reg #	Name	Address/Phone/Email	City	State	Zip																				
3	Adrienne Cassidy	601 E. Richmond St. 606.555.4425 2cassy@windstream.net Digital Signature: Aug 29 2018 4:57 PM	Big City	KY	40123																				
		<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Activity</th> <th>Qty.</th> <th>Cost</th> <th>Total</th> </tr> </thead> <tbody> <tr> <td>Registration Fee</td> <td style="text-align: center;">1</td> <td style="text-align: right;">100.00</td> <td style="text-align: right;">100.00</td> </tr> <tr> <td>Horseback Riding</td> <td style="text-align: center;">1</td> <td style="text-align: right;">20.00</td> <td style="text-align: right;">20.00</td> </tr> <tr> <td>Dinner Reception</td> <td style="text-align: center;">1</td> <td style="text-align: right;">25.00</td> <td style="text-align: right;">25.00</td> </tr> <tr> <td colspan="3" style="text-align: right;">Total Fees:</td> <td style="text-align: right;">145.00</td> </tr> </tbody> </table>				Activity	Qty.	Cost	Total	Registration Fee	1	100.00	100.00	Horseback Riding	1	20.00	20.00	Dinner Reception	1	25.00	25.00	Total Fees:			145.00
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Processing Fee:		0.00	Total Payments: 145.00																						
Balance Due for Adrienne Cassidy:			0.00																						
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Aug 25 2021	*****1111	Transaction ID: e2c66ea2-...	30.00																						
Processing Fee:		0.00	Total Payments: 30.00																						
Balance Due for Ryan Cassidy:			115.00																						

Payments

► Reports ► Event Registration Reports ► Summaries ► Payments

The Payments report lists payments received for any or all events. You can filter the report by Event, Paid Date, and Source on the Standard Search tab. Filtering on Source makes it possible to print reports for payments entered through CDM+ desktop separately for payment received by credit/debit card through CDM+ Engage. Using the Report Options to show the deposit date and ledger reference number, the report provides a connection to the entries in CDM+ Accounting.



Custom Listing Reports

► **Reports** ► **Event Registration Reports** ► **Listings and Exports** ► **Registration Custom Listing and Export** or **Activity Custom Listing and Export**

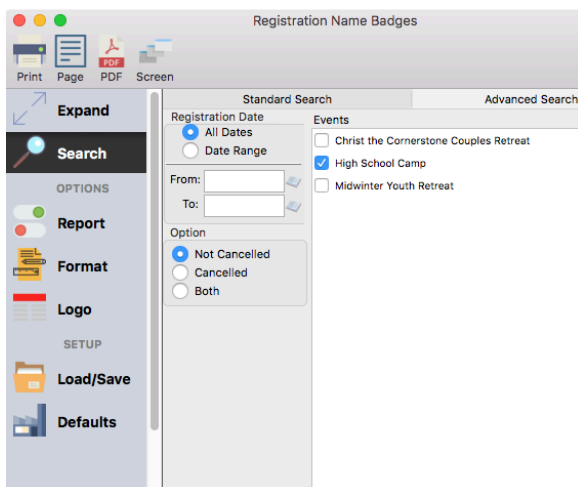
For even more control over the content of an Event Registration report, use either the Registration Custom Listing or Activity Custom Listing report. Attend the Membership Custom Reports class to learn how to set up custom listing reports.

Name Badges

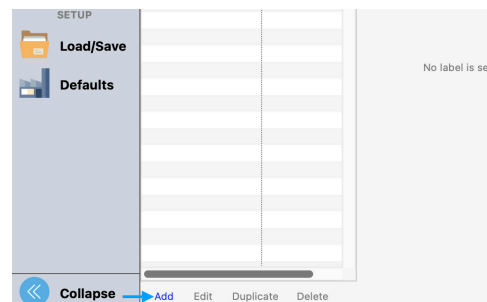
Name badges either for all Event registrants or just for registrants of a selected Activity can be printed. To print name badges for all registrants select Registration Name Badges from the report menu; select Activity Name Badges to print name badges for a selected Activity. The illustration below is for all registrants so the Registration Name Badges report is selected.

► **Reports** ► **Event Registration Reports** ► **Labels** ► **Registration** or **Activity Name Badges**

Select the event or activity from the **Search tab**. On the **Report tab**, you can choose the format or add/edit the badge you want to create.



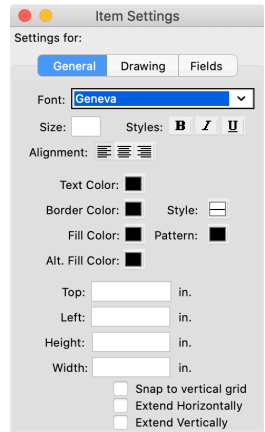
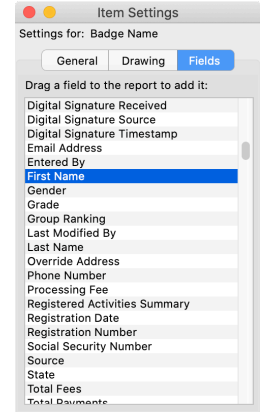
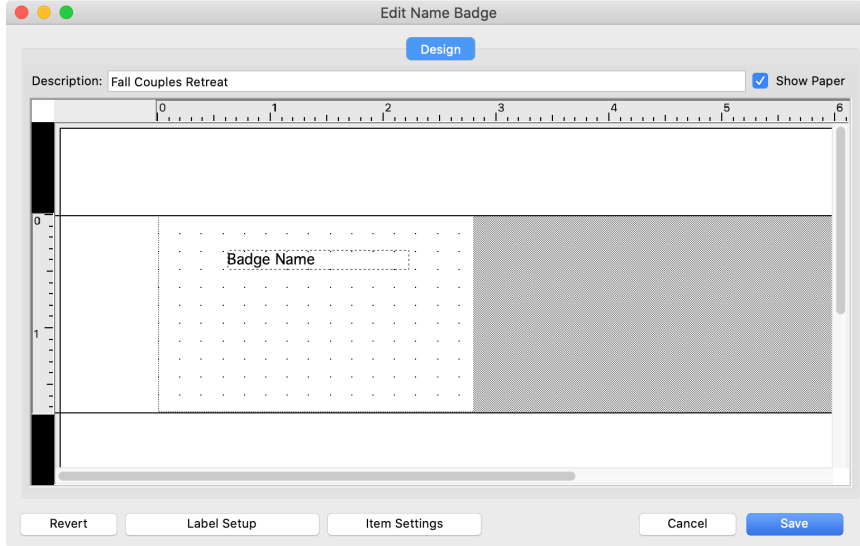
Click small **Add** button to create a new name badge. Choose the Avery format, give it a name, and click **OK**.



Or highlight an existing badge in the list and click either the small **Edit** or **Duplicate** button.

Edit Name Badge

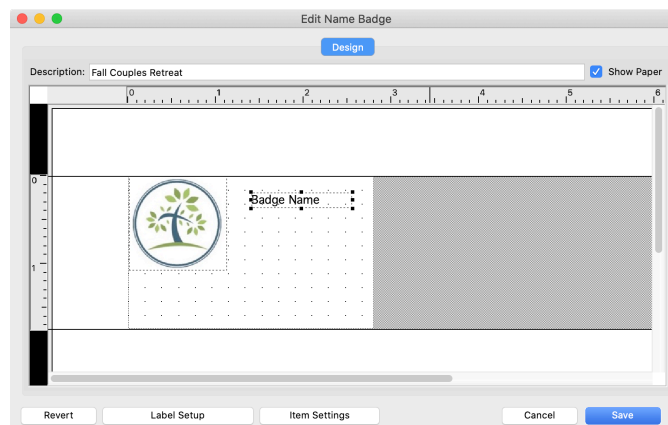
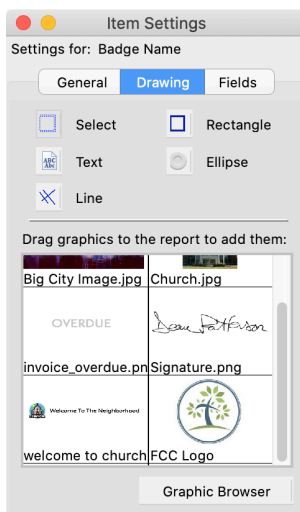
To begin adding content and formatting the name badge, click the **Item Settings** button. Add a field from the Event Registration by clicking the **Fields** tab, then dragging the field name onto the badge palette.



Drag the field name on the palette to adjust its position, and use the anchors to adjust the size of the item on the badge.

Use settings on the General tab to select the font, text size, color and alignment.

Images can be added using the **Drawing** tab of the Item Settings window. Drag the image to the palette, and use the anchors to resize it. The image aspect will be maintained.



Labels/ Envelopes

► Reports ► Event Registration Reports ► Labels ► Registration or Activity Labels/Envelopes

Use Registration or Activity Labels/Envelopes to prepare mailings to registrants for an event or participants in one or more activities. Select the event or activity from the **Search** tab. On the **Report** tab, you can choose the sort order, specify all upper case for the label, or include an attention line, such as "To the Parents of;" for a youth event. Checking the **One Per Household** box saves postage by combining all registrants for an event into one envelope.

Activity Report

Report Type

- Detail
- Page by Activity
- Page by Group
- Do Not Page By Activity
- Do Not Group By Activity
- Composite

Report Options

- Show Notes
- M/F Totals
- Total Fees
- Individual Totals
- Show User Fields
- Show Contact Info
- Show Email

Activity Detail
 First Church
 123 Main Street
 Big City, KY 40123
 606/555-1234

All Activities

Fall Couples Retreat

Reg #	Name	Qty.	Address	City	State	Zip	Phone
Dinner Reception							
3	Adrienne Cassidy	1	601 E. Richmond St.	Big City	KY	40123	606.555.4425
Total Fees: 145.00		Total Payments: 145.00		Balance: 0.00			
4	Ryan Cassidy	1	601 E. Richmond St.	Big City	KY	40123	606.555.4425
Total Fees: 145.00		Total Payments: 30.00		Balance: 115.00			
2	Andrea Hunter	1	3408 Rolling Terrace	Big City	KY	40123	606.555.9112
Total Fees: 145.00		Total Payments: 0.00		Balance: 145.00			
1	Mark Hunter	1	3408 Rolling Terrace	Big City	KY	40123	606.555.9112
Total Fees: 145.00		Total Payments: 100.00		Balance: 45.00			
Dinner Reception Totals		Registrants: 4					

Activity Report

► Reports ► Event Registration Reports ► Listings and Exports ► Activity

Activity Report

Report Type

- Detail
- Page by Activity
- Page by Group
- Do Not Page By Activity
- Do Not Group By Activity
- Composite

Report Options

- Show Notes
- M/F Totals
- Total Fees
- Individual Totals
- Show User Fields
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- Show Email

Activity Detail
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 606/555-1234

All Activities

High School Camp

Reg #	Name	Qty.	Address	City	State	Zip	Phone
Allergic to Penicillin							
4	Bill A Martin	1	901 Woodson Ct	Big City	KY	40123	606.555.9112
Total Fees: 365.00		Total Payments: 365.00		Balance: 0.00			
6	Dean Phelps	1	99 Peaceful Valley	Big City	KY	40123	606.555.9112
Total Fees: 365.00		Total Payments: 365.00		Balance: 0.00			
Allergic to Penicillin Totals		Registrants: 2					
Fees:		0.00					

The Activity Report is searched by Event and then by selected Activity (or Activities). By default, the report includes Detail and prints one Activity per page. Your selections under Report Type, Reports Options, and Detail Options on the Report tab determine what information is included in the report. The **Composite** version is useful to supply a count to persons setting up an activity.