

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 Beginning/End/Deadline times are optional with a checkbox. 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.

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.

The CDM+ Event Registration program can optionally interface with the CDM+ Engage for online registration for events on your website.

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 with a checkbox. 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 displays the 'Event Records' window in the CDM+ software. It features a table with columns for 'Event Description', 'Location', and 'Beginning'. The 'Family Harvest Festival' is highlighted in blue. Below the table, a detailed form for this event is shown, including fields for 'Description', 'Location', 'Begin Date', 'End Date', 'Registration Deadline', 'Registration Fee', 'Maximum Registration', and 'Current Registration'. There are also checkboxes for 'Camp/Youth Event' and 'Registration Closed', and a checkbox for 'Skip Individual Record lookup when adding a new registration'. The 'Payment Account' is set to '4400 Event Registrations (3000.4400.J)'.

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	Blude 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 2018 12:00 PM



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 on the 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

Event Description	Location	Beginning
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Gala 2022		Sep 22 2022 12:00 AM
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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.

Adding Registrations for an Event

► Program ► Event Registration ► Registration Entry

The screenshot shows the 'Registration Entry' window. At the top, there's a title bar and a 'Show Closed Events' checkbox. Below that, the 'Events' pane lists several events, with 'Family Harvest Festival' selected. To the right, the 'Registrants for Family Harvest Festival' list shows three entries: 'Disney Mike', 'Disney Robin', and 'Fawn Janice'. The 'Fawn Janice' entry is highlighted. Below the lists, there are tabs for 'Registrant', 'User Fields', 'Activities', 'Payments', and 'Sent Notice'. The 'Registrant' tab is active, showing the 'Individual Record' for 'Janice Fawn'. The form includes fields for 'Date Registered' (Sep 13 2023 3:31 PM), 'Registration Number' (5), 'First Name' (Janice), 'Last Name' (Fawn), 'Badge Name' (Janice), 'Gender' (Female), 'Address' (123 Pine Rd), 'City' (Lexington), 'State' (KY), 'Zip Code' (40509), 'Country', 'Phone' (859) 467-8913, and 'Email' (janicefawn@email.com). There are also 'Fees' and 'MapQuest' sections.

 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.

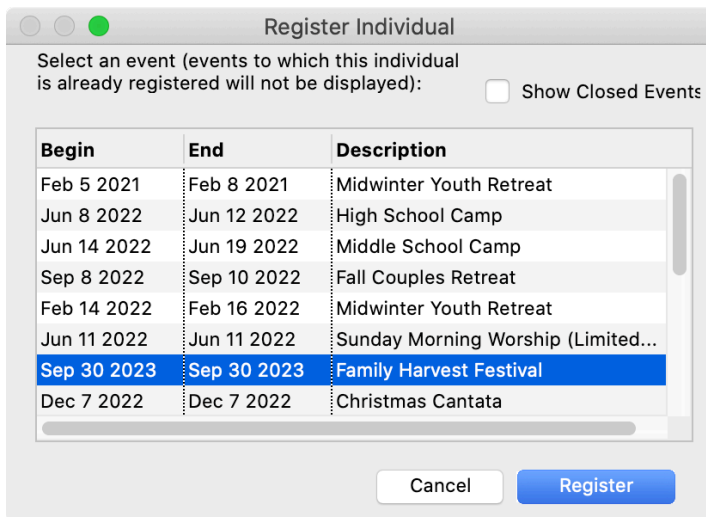
The Registration Entry window displays Events in the Events Listing pane; click once to highlight the Event to which you are adding registrations. Persons already registered for the chosen Event will display in the Registrant listing pane on the right. Click Add or Multi-Add and complete the registrant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

The screenshot shows the 'Select Individual' window. At the top, there's a title bar and a search bar with 'Janice' entered. Below the search bar, there's a table with columns: 'First Name', 'Individual Last Name', 'Last Name', 'Primary Phone', and 'Salutation Name'. The table contains one row: 'Janice', 'Fawn', 'Fawn', and 'Janice'. To the right of the table is a sidebar with a 'SHOW' button and several icons: 'All', 'Find', 'Searches', 'DO', 'Add', 'Select', 'Cancel', 'GO', and 'Individual'. At the bottom, there's a 'Configure' button and a 'Collapse' button. The status bar at the bottom shows 'Janice Fawn' and '1 Result'.

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.

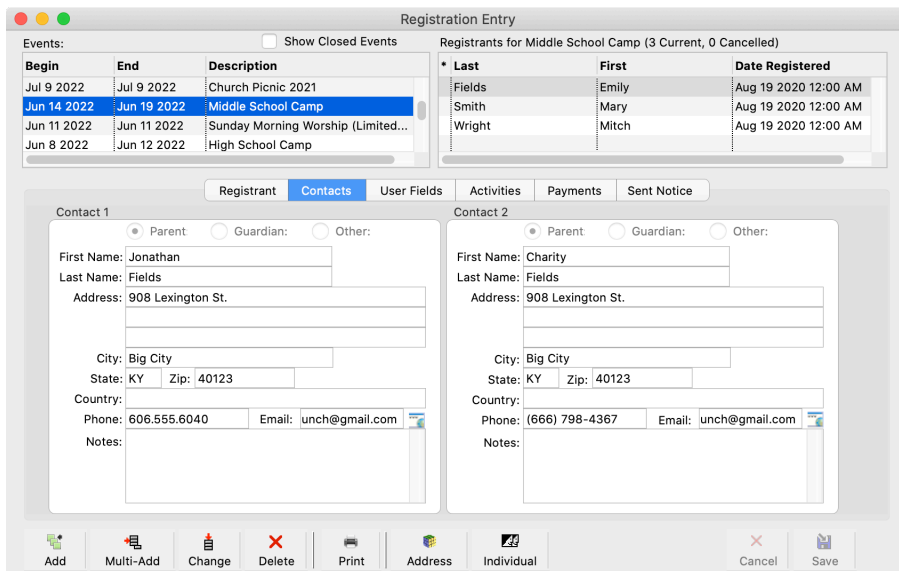
To register a person **NOT** in the Membership program:

- 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

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.

The screenshot shows the 'Payments' tab for a registration entry. It features a table of payments with columns for Date, Amount, Check/Credit Card Number, Notes, and Posted To Ledger. Below the table is a summary section with fields for Act. Fees, Payments, and Balance Due. At the bottom, there are navigation buttons like Add, Multi-Add, Change, Delete, Print, Address, Individual, Cancel, and Save.

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	

Summary: 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
✓ Sep 13 2023	5.00	4978	Dinner Voucher Source: Registration Entry	

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.

The screenshot shows the 'Sent Notice' tab for a registration entry. It features a table of sent notices with columns for Type, Description, Date Sent, Name, and Email. Below the table is a summary section with fields for Act. Fees, Payments, and Balance Due. At the bottom, there are navigation buttons like Add, Multi-Add, Change, Delete, Print, Address, Cancel, and Save.

Type	Description	Date Sent	Name	Email
✓ ✗ Email	2022 Gala	Jul 15 2022 4:48 PM	Joe smith	terryhatmaker@gmail.com

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

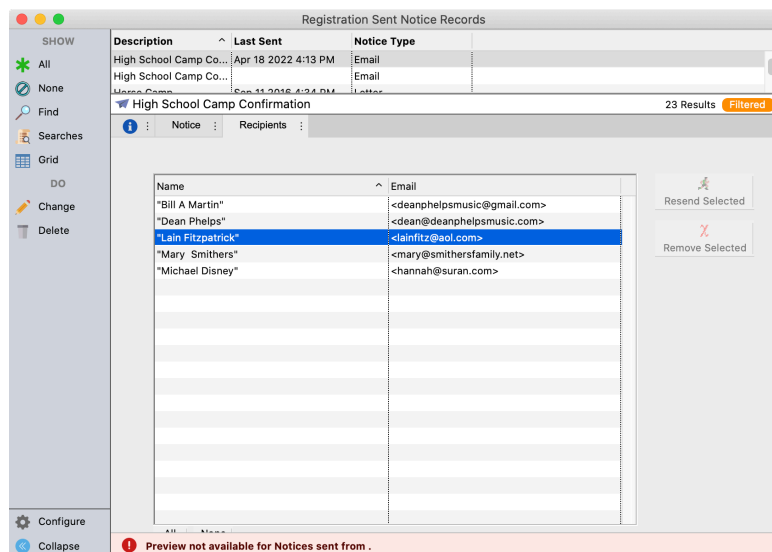
- Click the running man icon next to a notice to send it to just this registrant again.
- Click the round green icon next to a notice to open it in the Registration Sent Notices window.



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**



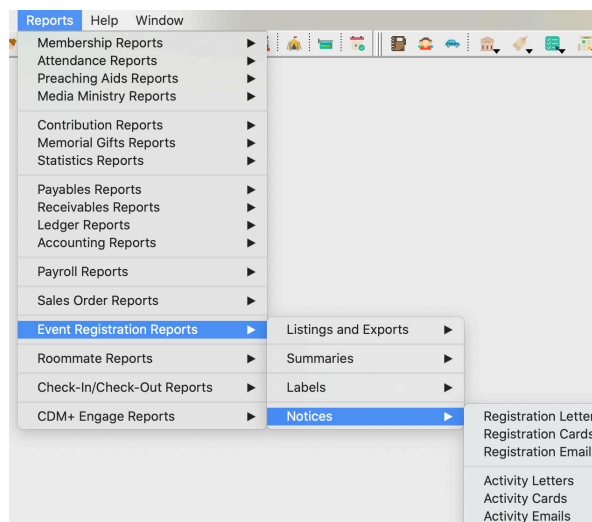
The Notices tab displays detail of highlighted Registration or Activity Notice.

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.

Setting Up Registration Notices

► **Reports ► Event Registration Reports ► Notices**



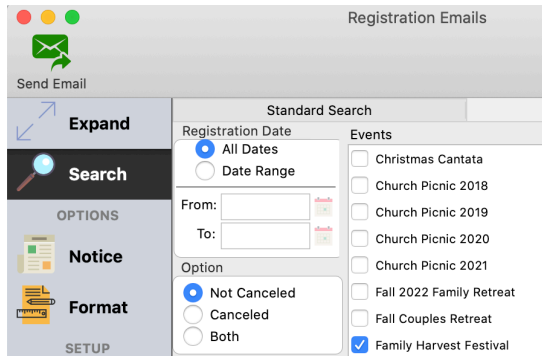
Both Event and Activity Notices (letters, cards, and emails) are created here.

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.

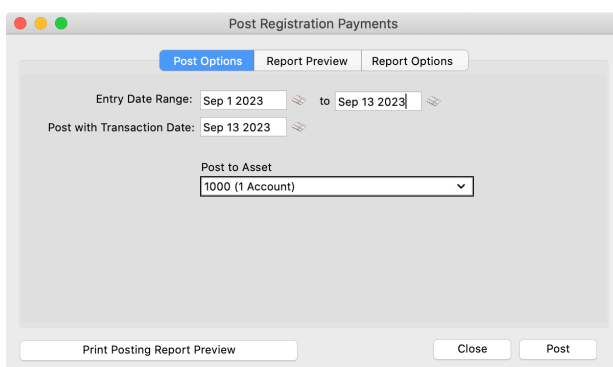


The Event Registration Notices support advanced email, document creation, and editing. Attend the Notices class or refer to the Notices section in this manual for details on embedding database fields for personalization, formatting text, or adding graphics to your notice.

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.

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.

The screenshot shows the 'Master List' report interface. On the left is a sidebar with navigation options: Expand, Search, Report, Format, Page Setup, Logo, Text, Load/Save, Defaults, and Collapse. The main area contains filter options for 'Sort Options' (Registrant Name, Ascending), 'Report Options' (Show Fees, Show Reg Number, Group By Gender), and 'Camp Options' (Show Age/Grade). Below these is a table of registrants for the 'Fall Couples Retreat' event.

Name	Address	Phone	Fees	Paid	Due
Adrienne Cassidy	601 E. Richmond St. Big Cty KY 40123	606.555.4425	145.00	145.00	0.00
Ryan Cassidy	601 E. Richmond St. Big Cty KY 40123	606.555.4425	145.00	30.00	115.00
Al Delvecchio	1660 Island Dr Big Cty KY 40123	606.555.4576	100.00	0.00	100.00
Camille Delvecchio	1660 Island Dr Big Cty KY 40123	606.555.4576	100.00	0.00	100.00
Mike Disney	107 Peachtree Dr Apt 2 Big Cty KY 40123-2318	606.555.1739	100.00	0.00	100.00
Susan Disney	107 Peachtree Dr Apt 2 Big Cty KY 40123-2318	606.555.1739	100.00	0.00	100.00
Andrea Hunter	3408 Rolling Terrace Big Cty KY 40123	606.555.9112	145.00	0.00	145.00
Mark Hunter	3408 Rolling Terrace Big Cty KY 40123	606.555.9112	145.00	100.00	45.00

This screenshot shows the search and filter options for the Master List report. It includes a 'Standard Search' section with 'Registration Date' (All Dates, Date Range) and 'Option' (Not Canceled, Canceled, Both) filters. An 'Events' section lists various events with checkboxes, where 'Fall Couples Retreat' is selected.

Master List Detail

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

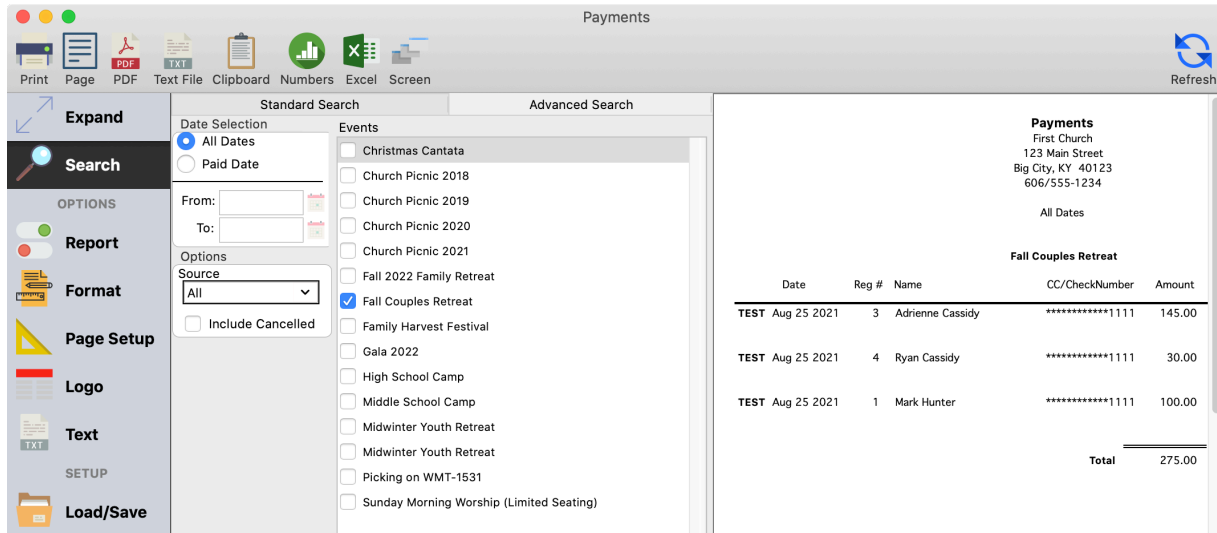
This version of the Master List report includes the information on the Master List report, plus any Activity registration and detailed payment information. User Fields, Contact, and Activity Notes are optional.

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: 30.00																						
Balance Due for Ryan Cassidy:					115.00																				

Payments

► Reports ► Event Registration Reports ► Summaries ► Payments

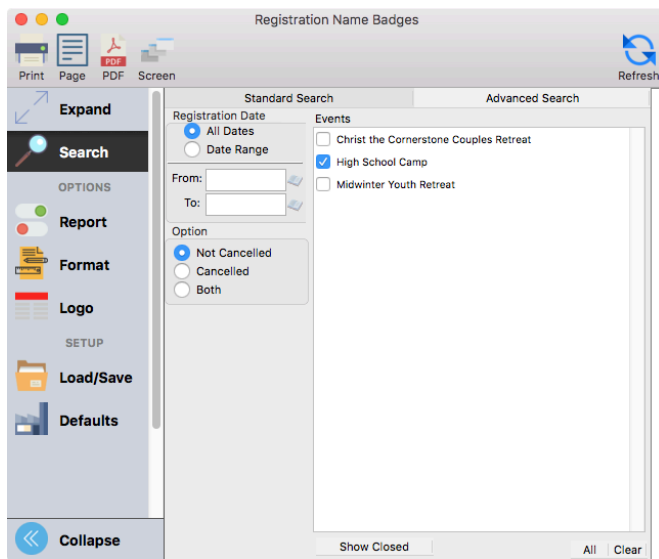
The Payments report lists payments received for any or all events. You can filter the report by Event, Paid Date, and Source on the Standard Search tab. Filtering on Source makes it possible to print reports for payments entered through CDM+ desktop separately for payment received by credit/debit card 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.



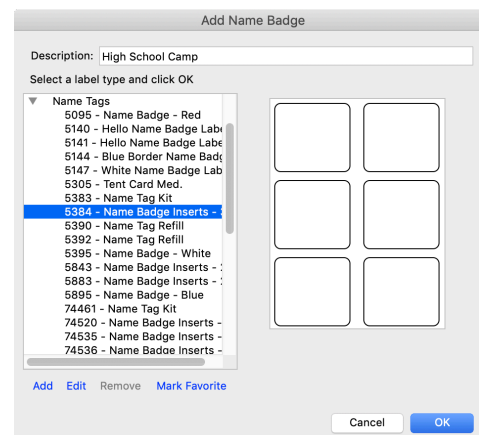
Name Badges

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



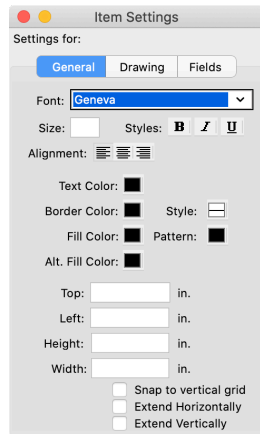
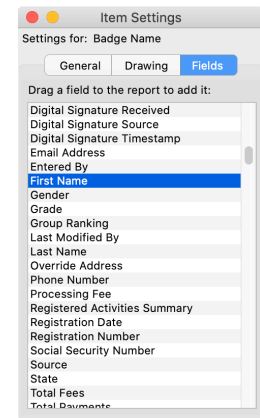
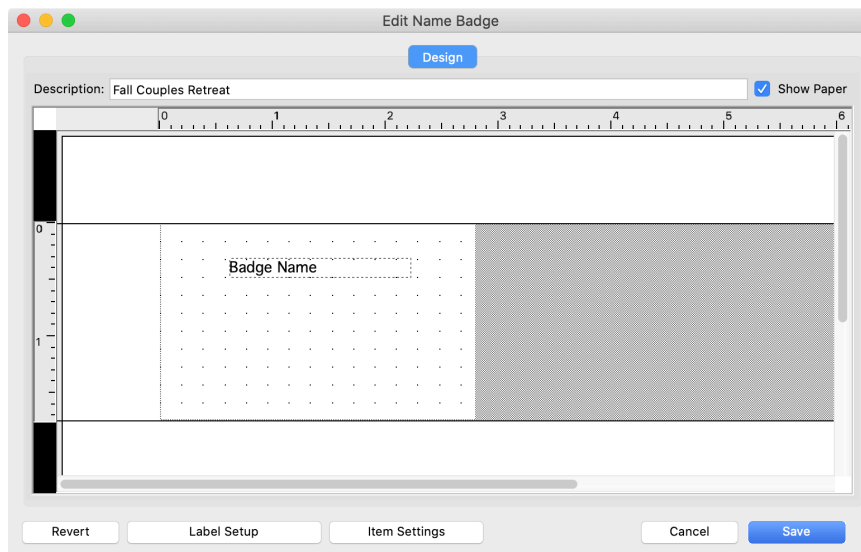
Click small **Add** button to create a new name badge. Choose the Avery format, give it a name, and click **OK**.



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

Edit Name Badge

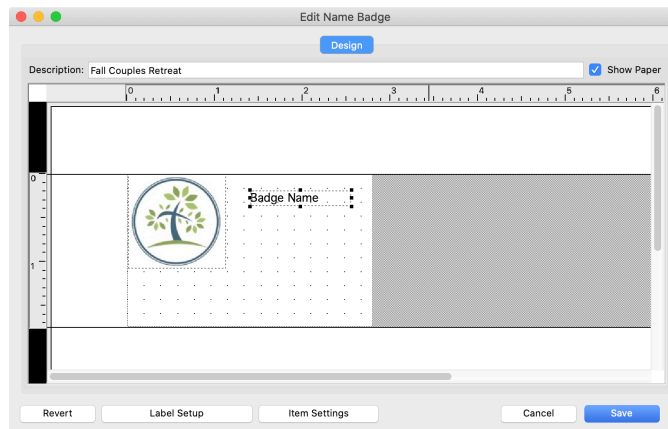
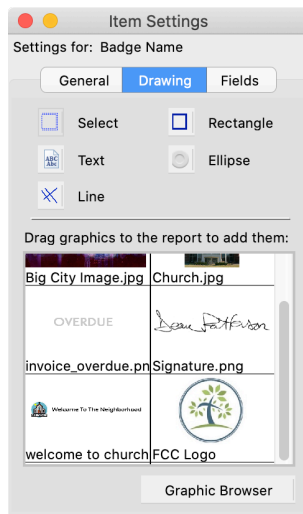
To begin adding content and formatting the name badge, click the **Item Settings** button. Add a field from the Event Registration by clicking the **Fields** tab, then dragging the field name onto the badge palette.



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.

The screenshot shows the 'Activity Report' window. The 'Report' tab is selected. The 'Report Type' section has 'Detail' selected. The 'Report Options' section has 'Show Notes', 'Total Fees', and 'Individual Totals' checked. The 'Detail Options' section has 'Show User Fields', 'Show Contact Info', and 'Show Email' unchecked. The main area displays the 'Activity Detail' for 'Dinner Reception' at 'First Church'. The table below shows registrant information:

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

The screenshot shows the 'Activity Report' window. The 'Report' tab is selected. The 'Report Type' section has 'Detail' selected. The 'Report Options' section has 'Show Notes', 'Total Fees', and 'Individual Totals' checked. The 'Detail Options' section has 'Show User Fields', 'Show Contact Info', and 'Show Email' unchecked. The main area displays the 'Activity Detail' for 'High School Camp' at 'First Church'. The table below shows registrant information:

Reg #	Name	Qty.	Address	City	State	Zip	Phone
High School Camp							
Allergic to Penicillin							
4	Bill A Martin	1	901 Woodson Ct	Big City	KY	40123	606.555.8176
Total Fees: 365.00			Total Payments: 365.00		Balance: 0.00		
6	Dean Phelps	1	99 Peaceful Valley	Big City	KY	40123	
Total Fees: 365.00			Total Payments: 365.00		Balance: 0.00		
Allergic to Penicillin Totals		Registrants:	2				
		Fees:	0.00				
Campers Covenant							
1	Max Harvey	1	1128 Ivy League Blvd.	Big City	KY	40123	606.555.0567

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.

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.

Web Ministry Tools – Event Registration

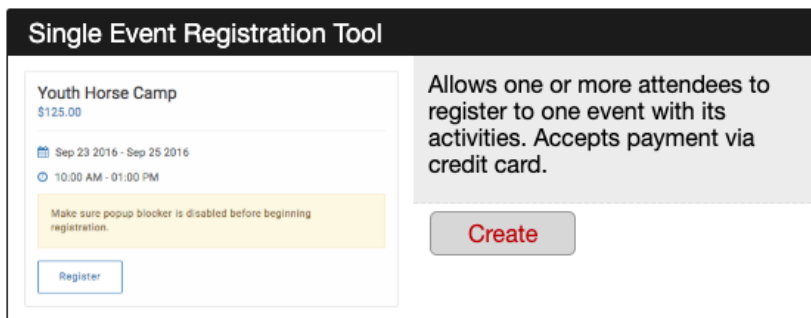
Requirements to use the CDM+ Single Event Registration Tool:

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

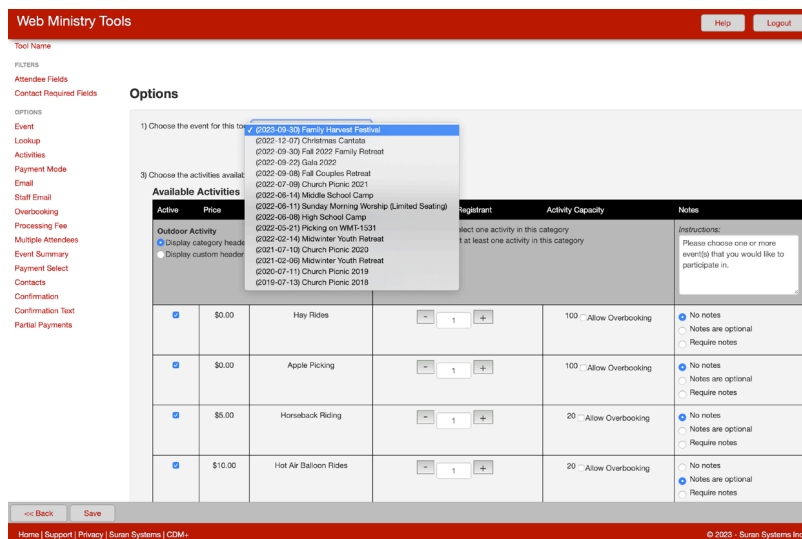
The Event Registration Web Ministry tool gets its data from: CDM+ Event Registration and, optionally, Membership

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 Single ER 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

Now scroll back up to the **Filters** heading. Here 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

The screenshot shows the 'Available Activities' configuration screen in the 'Web Ministry Tools' interface. The page title is '3) Choose the activities available for registration at this event'. The interface includes a sidebar with various filter options like 'Attendee Fields', 'Contact Required Fields', 'Event', 'Lookups', 'Activities', 'Payment Mode', 'Email', 'Staff Email', 'Overbooking', 'Processing Fee', 'Multiple Attendees', 'Event Summary', 'Payment Select', 'Contacts', 'Confirmation', 'Confirmation Text', and 'Partial Payments'. The main content area is a table with the following columns: 'Active', 'Price', 'Description', 'Maximum Quantity per Registrant', 'Activity Capacity', and 'Notes'. There are two category headers: 'Outdoor Activity' and 'Food'. Under 'Outdoor Activity', there are four activities: 'Hay Rides' (Price: \$0.00, Capacity: 100), 'Apple Picking' (Price: \$0.00, Capacity: 100), 'Horseback Riding' (Price: \$5.00, Capacity: 20), and 'Hot Air Balloon Rides' (Price: \$10.00, Capacity: 20). Under 'Food', there is one activity: 'Dinner Voucher' (Price: \$5.00, Capacity: 100). The 'Notes' column contains instructions for each category. At the bottom, there are navigation buttons: '<< Back', 'Save', and a footer with 'Home | Support | Privacy | Suran Systems | CDM+' and '© 2023 - Suran Systems Inc.'.

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.

The screenshot shows the 'Web Ministry Tools' administration interface. The browser address bar indicates the URL: `wmt.suran.com/wa_admin/widgets/options/1936#option4`. The page title is 'Web Ministry Tools' with 'Help' and 'Logout' buttons. A left sidebar contains a navigation menu with categories like 'Tool Name', 'FILTERS', 'Attendee Fields', 'Contact Required Fields', 'OPTIONS', 'Event', 'Lookup', 'Activities', 'Payment Mode', 'Email', 'Staff Email', 'Overbooking', 'Processing Fee', 'Multiple Attendees', 'Event Summary', 'Payment Select', 'Contacts', 'Confirmation', 'Confirmation Text', and 'Partial Payments'. The 'Activities' menu item is highlighted in red. The main content area displays configuration options for 'Option 4'. It includes a checkbox for 'Accept payment via electronic payment?' which is checked, with a note: '(Check this box if you wish to accept electronic payments for this event and you've already established your merchant account for use by CDM+ Web Ministry Tools.)'. Below this is a 'Payment Mode' dropdown menu set to 'Live'. The next section, '5) Select the Event Registration Notice to use.', features a list of notice options: 'Cornerstone Confirmation', 'High School Camp Confirmation' (selected with a green checkmark and border), 'Last Minute Info', 'Men's Fellowship Weekend Confirmation', 'Midwinter 2019', 'Missing Permission Form', 'New notice', 'Registration Confirmation', 'Untitled Notice 1', and 'VBS Confirmation'. A 'Clear All' button is located at the bottom of this list. At the bottom of the page, there are '<< Back' and 'Save' buttons, and a footer with 'Home | Support | Privacy | Suran Systems | CDM+' and '© 2019 - Suran Systems Inc.'

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.

The screenshot shows the 'Select Registration Emails' interface. The 'Categories' column lists various categories with their counts. The 'Notices' column lists specific notices, with 'Cornerstone Confirmation' selected. The preview pane shows the email body for the selected notice, including a photo of people riding horses and text from a pastor.

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.

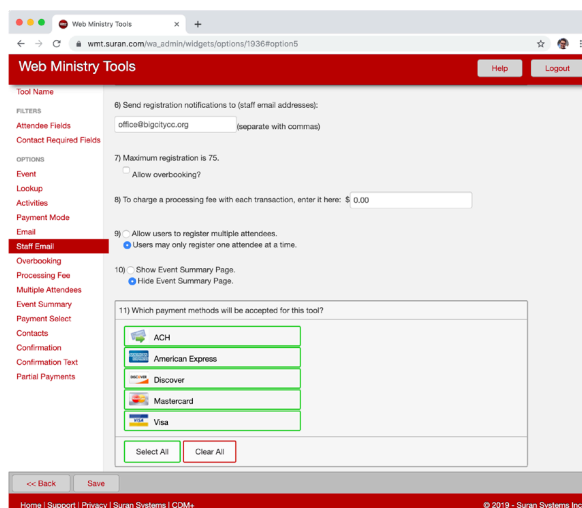
Option 7

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, there will not be a box to check.

Option 8

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

Consider the ramifications if you elect to charge a fee. It may discourage people from using a tool that saves both you and the registrant time and trouble. In order to recoup some of the expenses associated with taking online transactions, you may be better served to consider these processing fees part of the cost of the event and increase the cost of the event or its activities.



The screenshot shows the 'Web Ministry Tools' administration interface. The main content area displays configuration options for a registration tool. A sidebar on the left lists various tool settings: Tool Name, FILTERS, Attendee Fields, Contact Required Fields, OPTIONS, Event, Lockup, Activities, Payment Mode, Email, Staff Email, Overbooking, Processing Fee, Multiple Attendees, Event Summary, Payment Select, Contacts, Confirmation Text, and Partial Payments. The 'Payment Mode' section is currently selected. It contains several options: 8) Send registration notifications to (staff email addresses): office@bigcitycc.org (separate with comma); 7) Maximum registration is 75. Allow overbooking? (checkbox); 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. (checkbox); 10) Show Event Summary Page. Hide Event Summary Page. (checkbox); 11) Which payment methods will be accepted for this tool? ACH, American Express, Discover, Mastercard, and Visa. There are 'Select All' and 'Clear All' buttons at the bottom of the payment methods list. The interface includes a 'Help' and 'Logout' button in the top right, and a footer with 'Home | Support | Privacy | Suran Systems | CDM+' and '© 2019 - Suran Systems Inc.'

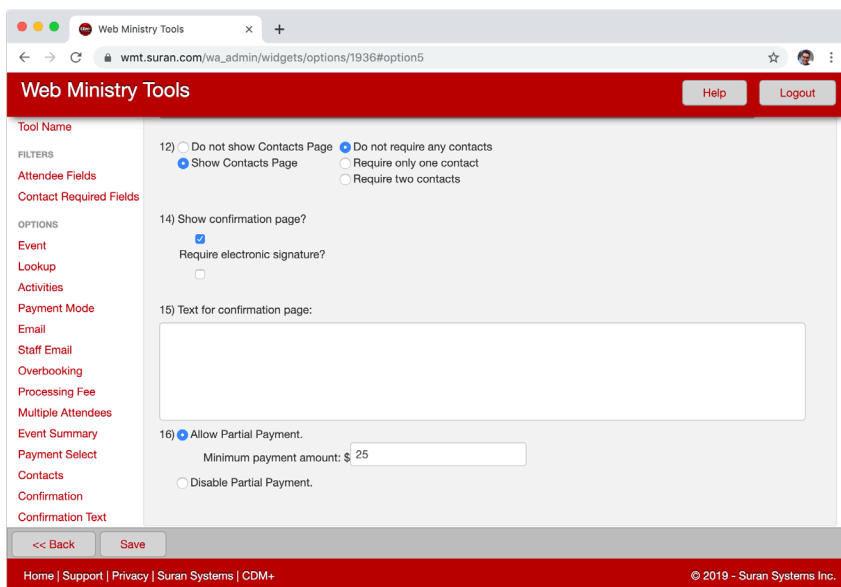
Options 9 through 17

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.

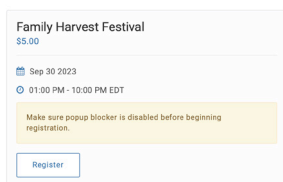
17. CDM+ Regional program users have the option of showing a church selection drop list of all churches marked as “Congregation” in their CDM+ Regional Church Records.

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*

Ava

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 the 'Activities' window for 'High School Camp [TEST MODE]' with a cost of \$350.00. The breadcrumb trail is 'Attendees / Contacts / Activities / Payment / Confirmation / Completion'. Below the breadcrumb is a table with columns: Activity, Selection and Notes, Fee, and Subtotal. The table is divided into two sections: 'Medical Alerts' and 'Food Allergies'. Under 'Medical Alerts', there are rows for 'Allergic to Penicillin', 'Allergic to Latex', and 'Medications'. Under 'Food Allergies', there are rows for 'Gluten', 'Dairy', 'Soy', and 'Peanuts'. Each row has a checkbox in the 'Selection and Notes' column, which is currently unchecked. A tooltip message 'You must select this activity' is visible over each checkbox. The 'Fee' and 'Subtotal' columns are empty.

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 the 'Payment' window for 'High School Camp [TEST MODE]' with a cost of \$350.00. The breadcrumb trail is 'Attendees / Contacts / Activities / Payment / Confirmation / Completion'. The window is titled 'Partial Payment' and offers two payment options: 'Pay in full (\$350.00)' (selected) and 'Pay \$25 (\$25 required)'. Below this is the 'Billing Information' section, which includes a dropdown menu for 'Attendees'. The form contains several required fields: 'First and Last Name *', 'Street Address *', 'City *', 'Country *' (set to 'United States'), 'State *' (set to 'Please Select a St'), and 'Zip *'. The 'Payment Method' section offers 'Pay by Credit Card' (selected) and 'Pay by Bank Account'. Below this are fields for 'Credit Card Number *', 'Exp. Month *', 'Exp. Year *', and 'CVV *'. At the bottom, there is a red '[TEST MODE]' label, a 'powered by' logo, and a 'Wildcard SSL' logo. Navigation buttons for '<< Previous Step' and 'Next Step >>' are at the bottom.

– 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.

A screenshot of the registration tool interface. The top section shows a list of events with columns for 'Begin', 'End', 'Description', 'Last', 'First', and 'Date Registered'. The event 'Family Harvest Festival' is selected. Below this, the registrant's details are shown: First Name: Janice, Last Name: Fawn, Date Registered: Sep 13 2023 3:31 PM, Registration Number: 5. The address is 123 Pine Rd, Lexington, KY 40509. The event fee is 5.00, and the total amount due is 22.00.

A completed registration

A screenshot of the contact information section of the registration tool. It shows two contact entries for 'Middle School Camp'. Contact 1: Jonathan Fields, 908 Lexington St., Big City, KY 40123. Contact 2: Charity Fields, 908 Lexington St., Big City, KY 40123. The phone number is (606) 798-4367 and the email is unch@gmail.com.

The registrant's contact information

A screenshot of the activities section of the registration tool. It shows a list of activities with columns for 'Activity', 'Fee', 'Registered', 'Description', 'Qty', 'Fee', 'Total', and 'Notes'. Activities include Food (7.00), Dinner Voucher (5.00), Dessert Voucher (2.00), Outdoor Activity (15.00), Hay Rides (0.00), Apple Picking (0.00), Horseback Riding (5.00), Hot Air Balloon Ride (52.00), T-shirt - SM (10.00), T-shirt - M (10.00), T-shirt - L (10.00), T-shirt - XL (10.00), and T-shirt - Custom Sil (12.00).

Activities

A screenshot of the payments section of the registration tool. It shows a table of payments with columns for 'Date', 'Amount', 'Check/Credit Card Number', 'Notes', and 'Posted To Ledger'. Payments include a Dinner Voucher (5.00), Dessert Voucher (2.00), T-shirt - M (10.00), and Event Fee (5.00).

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.

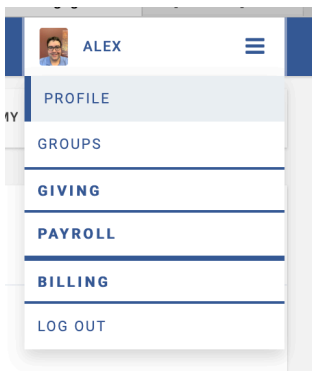
Publish this tool using these options:

Embedded HTML
Copy and paste this HTML tag into your website. This will embed the tool directly onto your website.
<pre><script type="text/javascript" src="https://wmt.suran.com/tool?guid=7b0168aa2ee811e9918dc03d79cc1915"></script></pre>
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.
<pre>New Single Event Registration Tool</pre>
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.
<pre>https://wmt.suran.com/tool?guid=7b0168aa2ee811e9918dc03d79cc1915</pre>
Preview Link
Note: that this link will be displayed from inside the Web Ministry Tools Website.
<pre>https://wmt.suran.com/main/preview/8121</pre>
Publish to Engage
<input checked="" type="checkbox"/> 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.



From Events, a member can register for an event or make payments on events for which they've registered and carry a balance.



Using the Event Registration Tool with Engage

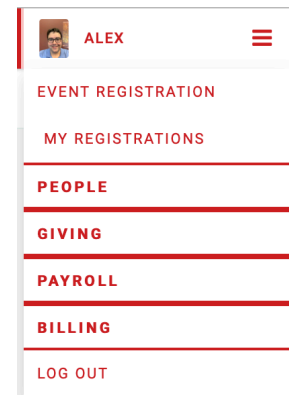
The Event Registration Web Ministry Tool can be used with Engage to allow members to register from their Engage account. When a member registers from Engage, Engage uses the information from their Individual Record to complete the Attendee page.

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 -> My Registrations from the navigation menu.



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

