Managing your Event Module: Registrar Functions, Participants and Reporting

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Registrar Functions
Keeping track of registration numbers and entering the names of people who have paid via cash or check are part of the event manager’s responsibilities.

If your club has set up online registration but is also accepting cash or check payments, you can enter the participants’ information into your event. Ensure all check and cash payers are entered into your event module so that:

- Your registration list is up-to-date; no need for multiple lists
- If a capacity is set, there will be no risk of overbooking
- Nametags can be printed for all registrants via the nametag report
- Everybody will receive appropriate reminder emails or last-minute venue changes via SmartMail Lite

Volunteers who have been given access to the event module can manage any of their group’s events. They do not have to be the person who initially set up the event.
Registering Check and Cash Payers

Access the event management page via the group management page.

Washington DC Stanford Association : Manage Group

This is your one-stop spot for managing your group’s web presence and communications with members. Add members, email members, post pictures and more. Your group’s virtual world is in your hands.

Manage Members

- There are 382 current members.
- View membership reports

Register a new member

Email group

Manage Settings

Groups Pages:
- UDCSA Newsletters
- DC-area Stanford Groups
- Manage flagged items

Manage group settings

Events

- How To Create a Scheduled Event - 0 registrants
- F&H Symposium (Pending) - 0 registrants

Manage events

Create a new event

Gallery

- 1 Active Albums with 9 pictures
- Last picture upload to Terra Cotta Warriors on Jun 13, 2010 4:12 p.m.

Manage gallery

Create a new photo album

Discussion Board

- Newest topic: Interested in Tai Chi? - Sep 06, 2011 11:33 a.m.

Manage discussion board

Create a new board post

In the event management page, find your event and click the registrar link beside the event.

Manage Events

Event Quick Search

Keyword:

Date From: [ ] To: [ ] Include past events [ ]

Stanford Alumni [ ] All event categories [ ] Sort by [ ] Search [ ]

<table>
<thead>
<tr>
<th>Event Name</th>
<th>Start Date</th>
<th>Category</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Showing 1 - 50 of 84</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Big Game Party</td>
<td>11/19/2010</td>
<td>Viewing Party (Big Game)</td>
<td>Clone, Edit, Report, Registrar</td>
</tr>
<tr>
<td>Created By: Ms. Taryn Joupp Upchurch</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Updated By: Ms. Kristen A. Murray on 11/18/2011</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Su test 02/16/2012</td>
<td>02/16/2012</td>
<td>Arts &amp; Cultural Events</td>
<td>Clone, Edit, Report, Registrar</td>
</tr>
<tr>
<td>Created By: Ms. Suganthi Mohan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Updated By: Mr. Shalabh Mohan on 02/22/2012</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Su test 03/05/2012</td>
<td>03/05/2012</td>
<td>Arts &amp; Cultural Events</td>
<td>Clone, Edit, Report, Registrar</td>
</tr>
<tr>
<td>Created By: Ms. Suganthi Mohan</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Updated By: Ms. Suganthi Mohan on 03/06/2012</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

You will be taken directly to the registrar tab.
Registrar Tab
To register a person, search for them by email address or name. You do not need to complete all fields in the name search, but more information helps to narrow down search results for common names. If you cannot find a person, they may not be in Stanford’s system, or you may be searching using a nickname instead of their full name. If they aren’t in the system, at https://alumni.stanford.edu/get/page/register they can make one.

Once you find the person you are looking for, click “register” beside their name. You will be taken through the registration process as if you were the person registering.

Tip: A best practice is to make sure you denote that this is a cash and/or check payer in the person’s comment field. This way, you can easily tell at a glance who paid by check or cash when you run your registration list.

Event Registration: Register Yourself
Please enter your name as you would like it to appear on your nametag.

Your Information

First: * Rusty

Last: * Paine

Class Year (YYYY): 1950

Stanford Degree: BS

Age (if child): 

Include in “Look Who's Coming” list? ☐ Yes ☐ No

Comments for Event Planner: 

Continue

Required information is indicated with an *.
Continue through making the necessary selections, and proceed to the payment screen.

**Event Payment**

**Event Summary**

<table>
<thead>
<tr>
<th>Total Registration Fees</th>
<th>$25.00</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total Due:</strong></td>
<td>$25.00</td>
</tr>
</tbody>
</table>

**Refund and Cancellation Policy**

We're sorry, but refunds are not offered for this event.

**Payment Information (only visible to group leaders)**

- **Check**
- **Cash**
- **Other**

<table>
<thead>
<tr>
<th>Check Number:</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check Name:</td>
<td>Mr. Gregory James Yee</td>
</tr>
<tr>
<td>Check or Cash Amount:</td>
<td>25.00</td>
</tr>
</tbody>
</table>

Then click “Submit Payment” to complete their registration. You will have the option to send a confirmation to the registrant on the next screen, and if you have an additional email address for them, you may enter it as well.

**Please note**, entering a cash or check payment through the module will show the money in the registration, payment and balance due reports, but will not appear or be transferred in your monthly ACH transfer, as that is only for funds received electronically.
Viewing Event Participants

The Participants tab is a simple way to view your event registrants.

Participants are filterable based on their registration status. Use the pull-down menu under the search results to select the population you wish to view. Make your selections and press “go” to apply your filters.

Registration statuses are as follows:
Registered participants have completed the registration process and are fully paid.

Balance Status refers to participants who owe or are owed event fees.

No Payment refers to those who are holding a ticket but have not paid anything.

Underpaid refers to those who have paid for a portion of their tickets. This usually occurs when someone buys their own ticket, then reenters the registration process at a later date to add a guest, but doesn’t complete payment for them.

Overpaid refers to someone who is owed funds by the club.

In process are people who started registering but did not choose any tickets before ending the process.

Cancelled are people who have cancelled their registration. If this is a paid event and you are offering refunds, they are most likely due money by the club.

Sent regrets are people who have indicated they cannot attend and would no longer like to receive marketing regarding this event.

The filter defaults to Registered and Balance Due because both of these statuses hold tickets. In other words, they count towards your capacity.

To view only participants who are balance due, select “Balance Status” and then drill down to see people who have underpaid. From here, it is easy to email these participants all at once to see if they plan to complete their registration.
Canceling Balance Due Participants

As of August 2015, new events created in our event module automatically clear out unpaid balance dues every night. Those affected are sent an email informing them of this with the event link. If cloning events older than August 2015, we recommend creating a new event so that this feature is enabled.

To cancel a population’s registrations, use the filter options to select the population you need. In this example, we have selected “No Payment” and “In Process.”
Make sure to press the “Go” button after making your selections.

Search Results

Use the filters to select the participants you would like to email/send message and then click the corresponding button at the bottom of this page.

- **Allison M. Hall**
  98
  In Process
  Registration ID: 325250, Date: 03/14/2012, Status: In Process
  - View Reg
  - Send Message

- **Filomena Kofod** (Guest of Melanie Trifilo)
  Registered, No payment
  Registration ID: 325247, Date: 03/14/2012, Status: Balance Due
  - View Reg
  - Send Message

- **Melanie Trifilo**
  Registered, No payment
  Registration ID: 325247, Date: 03/14/2012, Status: Balance Due
  - View Reg
  - Send Message

The following action will apply to the total search results: 3

- Email These Participants
- Cancel Registrations
Select “Cancel Registrations” and confirm your choice on the pop-up window that follows. The participants will now be listed as cancelled, and any tickets they held will be free and no longer count towards your capacity. Please note, the registrants will be sent an automated cancellation email.

Sending Emails to Event Participants

At the bottom of the Participant page, notice that you can initiate a SmartMail Lite email to the selected participants immediately from this page. **Note:** the page displays a maximum of 20 names, but the email will go to all the participants that fit your selected filter, not just the ones displayed on the page.

We strongly encourage you to message balance due registrants before cancelling their registrations, and you can do so easily by filtering for specific registration status(es) and then selecting “Email These Participants.”
Other times you may want to email participants include last-minute changes to venue or time or if the event is cancelled.

To learn more about sending a SmartMail Lite email, refer to the SmartMail Lite guide.

Event Reporting
The reports are grouped into the five following categories:

- Contact information
- Nametag
- Payment
- Question
- Registration

For full information on running and copying reports, please refer to the “Reports (membership, financial & more)” document on the Club Leader Resource page.

Report Descriptions
Below are some of the most highly-used reports and a brief description of them, organized by category:

Contact information
Event Participant Contact List #446
See participant’s email, phone, and address information. If you need to mail tickets or contact a specific person, this is the report you need.

Nametags
SAA Logo Template #2779
This report contains registered and balance due participants. It is formatted to print on the 6-per-page SAA-logoed nametags, which you can get from your SAA regional manager. To use template #2779: select “download formatted report to Microsoft Word” as your output option, and set all your document margins to zero before printing. It’s a good idea to proof your labels before you print, as some participants’ names or
degrees may need to be edited, depending on how they entered their information during the registration process.

**Payment**  
*Payment and Balances Report by Registration #471*  
This displays all money paid, due, and adjustments needed (reimbursements due because of cancellations, for example). **Please note that this does not reflect the 3% credit card fee.**

**Questions**  
*Group Event Questions Responses Summary Report #1287*  
This report displays each question and a count of each answer. Use this report to see aggregate replies. For example, 53 people selected the chicken entrée, and 35 selected vegetarian.

*Group Event Questions Responses by Question Report #1286*  
This report displays each participant’s name and their specific answer to each question. For instance, you would use this report if you asked whether anyone was interested in planning the next event and needed to see who had answered ‘yes.’

**Registration**  
*Event Registration List #1282*  
This report has the names of all participants – registered, balance due, in process, cancelled as well as guest information and degrees. **Tip:** A best practice is to print a registration list the day of the event, so should any balance-due or in-process people attend, you can check that they have yet to pay and ask for payment at the door.

*Email club members who are not registered – Report #3041*  
Use this report for follow-up invitations to group members. The report automatically deletes anyone who has already registered OR sent their regrets (indicating they no longer wish to receive emails about this event.) We highly recommend you use this report to market a specific event.