Online Registration FAQs

- How do we register individuals from the ‘back end’? (Over the phone)
- How do we send emails to individuals on the roster?
- How do we view and print a roster of individuals attending and items they have registered for?
- How do we add payments when made by check (if applicable)?
- How do we add a person to the roster if they show up to the training and did not register?
- How do we use the transfer roster button?
- What extra fees are charged when using online registration?
- How often do we get invoiced for check payments? (If your organization has chosen to accept checks)
How do we register individuals from the ‘back end’? (Over the phone)

Add attendee to Roster
Choose Registration options (i.e. payment for course and additional items if there are any)
Select payment option (you may only have one), click Add to Cart

Click View Cart

Click the edit button to choose who to bill to
Search and choose the individual registering

Click Check Out

Enter Payment information
How do we send emails to individuals on the roster?

Choose the event out of the organizations list of trainings. Click on the Manage Event drop down and choose Manage Roster.

Click Email Attendees
Click Compose Email

Compose the email

**Note:** The email in the ‘From’ box is the contact for the organization. If that email should come from a different individual, change it here.

**Note:** Check the box next to the ‘From’ box to receive a CC of the email.

Click Preview Email
If email is complete, click Send Email. If the email needs editing, click Compose Email.

Step 3: Preview Email

To: selected recipients
From: ann.biana@montana.edu
Subject: Reminder

Dear [Attendee Name],
Please do not forget to bring your materials to the training on November 4th. See you all soon!

A success message will be shown on the page.
How do we view and print a roster of individuals attending and items they have registered for?

Choose the event out of the organizations list of trainings. Click on the Manage Event drop down and choose Manage Roster.

Click on the Print Roster button
View the report or export into a different file type by clicking save button.

<table>
<thead>
<tr>
<th>ID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Email Address</th>
<th>Position Title</th>
<th>Address</th>
<th>City</th>
<th>Paid</th>
<th>Books</th>
<th>Food</th>
</tr>
</thead>
<tbody>
<tr>
<td>6276</td>
<td>Andrews</td>
<td>Amy</td>
<td><a href="mailto:Amy.Andrews@email.com">Amy.Andrews@email.com</a></td>
<td>Director</td>
<td>900 Dr Melton Dr</td>
<td>Bozeman</td>
<td>Unpaid</td>
<td></td>
<td></td>
</tr>
<tr>
<td>36270</td>
<td>Oliver</td>
<td>Andria</td>
<td><a href="mailto:Andria.Oliver@email.com">Andria.Oliver@email.com</a></td>
<td>Billing</td>
<td>850 Dr Thiel Dr</td>
<td>Bozeman</td>
<td>Unpaid</td>
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<td></td>
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<tr>
<td>17061</td>
<td>Hill</td>
<td>Cheryl</td>
<td><a href="mailto:Cheryl.Hill@email.com">Cheryl.Hill@email.com</a></td>
<td>Family Service</td>
<td>1711 N 2nd Ave</td>
<td>Billings</td>
<td>Unpaid</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>Klein</td>
<td>Ann</td>
<td><a href="mailto:Kimberly.Klein@email.com">Kimberly.Klein@email.com</a></td>
<td>Staff</td>
<td>552 Willow Glen Drive</td>
<td>Helena</td>
<td>Unpaid</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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How do we add payments when made by check (if applicable)?

Choose the event out of the organizations list of trainings.
Click on the Manage Event drop down and choose Manage Roster.

Click enter payment next to the individual that has paid
Enter check information, including Check Number, Check Date, and Amount, click submit.
How do we add a person to the roster if they show up to the training and did not register?

Choose the event out of the organizations list of trainings.
Click on the Manage Event drop down and choose Manage Roster

Click on add Attendee

Search for individual
Choose program type

Check the fee for the training and any options they would like to choose if applicable

Select Registration Options:

Registration Fee

Online Registration Training Fee
Fee for training: $25.00

Books
Choose any books you would like to purchase.

Online Registration User Guide
User Guide created to walk you through online registration.

Course and Event User Guide
User Guide to walk you through the Course and Event approval process.

New User Guide
User Guide created to walk you through online registration.

Food
If you would like lunch provided choose one option.

Chicken
Chicken, vegetables, and a baked potato. $16.00

Vegetarian
Veggie pate with french bread $15.00

Total: $30.00

Choose the payment type if applicable for your organization. If individual is paying with credit cart click Add to Cart. If individual is paying by check use directions for check entry in this document.
Click view cart to collect the individuals credit card information.

Click the edit button to choose who to bill to.

Search and choose the individual registering.
Click Check Out

Enter Payment information
How do we use the transfer roster button?

Choose the event out of the organizations list of trainings.

Click on the Manage Event drop down and choose Manage Roster

View your active roster and click the Transfer button
Choose the training you are transferring the individual to, this list will reflect the current events that you have approved in the system.

Click Confirm

Note: If the fee for the training is not the same you will need to collect the rest of the fee from the individual or refund the individual through stripe. Your organization may create your own policies of how you would like to handle these situations.
What extra fees are charged when using online registration?

- There is a flat fee of $1.00 charged by the system developers.
  - This fee is charged when the payment is made online with a credit card.
- There is a 2.9% + .30 cent fee that will be charged on the fee total of the training for the use of Stripe (the online payment provider).
- There will be a $2.00 fee per check that is accepted for registration fees.
  - This fee is not on top of the fees charged above.
  - Your organization may choose to charge this extra fee to their users. To do this add wording to the alternate payment description (screen shot below).  **Note:** The total fee for the training in the system will not reflect this extra fee.

![Alternate Payments](image-url)
How often do we get invoiced for check payments? (If your organization has chosen to accept checks)

- Invoices will be sent to you on a quarterly basis from the system developers (New World Now).
- You will pay amount of this invoice to New World Now.