

EVENT REGISTRATION

SOAR - Scouting Online Affordable & Reliable

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Introduction

This Guide will walk you through the basics of using the SOAR Event Signup feature for event registration.

The Event Signup feature of your SOAR website is available in the Advanced Package and allows you to configure registration and payment for events.

Scouts and parents can then login to your SOAR website and register which members of their family are/are not attending a given event. The ability for unit members to register for events online, outside of unit meetings, will greatly help you in managing events.

If you have a PayPal account for your unit, you will also be able to collect payments for events online via Credit Card and PayPal accounts.

The Event Signup feature has many options to tailor the registration process and registration administration for a wide variety of event types.

Requirements

The primary requirement to use the Event Signup feature is that you have a populated Roster on your SOAR website. Make sure to have the Roster feature enabled at Admin/Control Panel/Features.

This is necessary because the Event Signup feature pulls names from the Roster for the registration process. If a name is not in the Roster, they cannot be registered by name for an event.

Each Scout should have an entry in the Roster. Each Parent should have an entry in the Roster. Parents and Scouts should be linked together to form family units.

The Event Signup feature can be used in both the Shared Account and Individual Accounts mode. Member's accounts on the website DO NOT need to be Active to be used in the registration process.

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Feature Availability

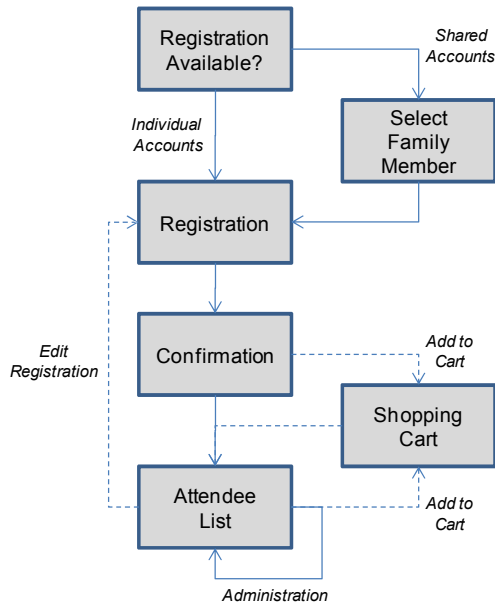
The Consolidated event type became available on Monday September 12, 2011. This is now the default choice for all new event registrations.

The previous By Family and By Individual event types will be available for newly created event registrations until Monday October 17th, 2011. This is to provide customers with a 30 day window to learn and transition to the new Consolidated event type. After this date you will only be able to use the Consolidated event type for new registrations.

Event registrations that have been created with the By Family and By Individual event types before October 17th will work in their current mode until the event has occurred, even after the October 17th date. You do not need to worry that registrations you setup will stop working when the switch to NEW registrations occurs.

For historical purposes, the Attendee List of events that used the By Family and By Individual event types will be available indefinitely.

Registration Process



The flowchart above shows how the registration process will work for the Event Signup feature.

The process starts with the question: Is registration currently available for the event? There are many configuration options that will affect this answer that are outlined later in this guide.

If an event is available for registration there are two paths for registration. Both paths start with the Register or Regrets buttons that are available when you are viewing an Event.



Shared Accounts will have to first select a family member's name from a drop down box - the website does not know who they are automatically.

Individual Accounts will skip the family name selection screen and go directly to the registration step because the website already knows who they are.

The registration page will display a list of family members with Yes/No checkboxes for each family member. The list of family members may be affected by configuration options and Den/Patrol filters associated with the event. The registration page will contain a notes section for each member. It may also contain registration for guests and definition of pricing based on configuration of the specific event.

Name	Type	Attending	Notes
Smith, Kyle	Scout	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Smith, Jane	Fare	<input type="radio"/> Yes <input checked="" type="radio"/> No	
Smith, Jean	Fare	<input type="radio"/> Yes <input checked="" type="radio"/> No	

Single cost of \$25.00 for all team family

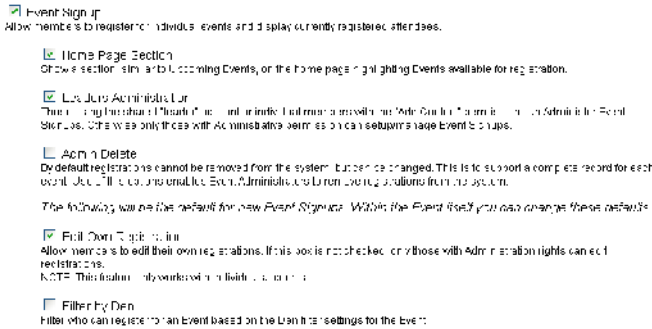
Once the registration is complete and submitted, the member will be presented with the confirmation page. This will include the details of their registration that they may print if interested. If there is a price for the registration and Online Payments is configured, an "Add to Cart" button will be available which will link to the SOAR shopping cart on your website.

Member can then access the Attendee List which will display the current list of member registered to attend and the list of those that have confirmed they are not attending (regrets) the event. From the Attendee List members may also edit their registration, if the option is enabled, and initiate payment for their registration.

From the Attendee List page, administrators will have the ability to edit individual registrations, record payments, and access the Print version which contains more contact information and is suitable to bring to the event for management purposes.

Enable Event Signup

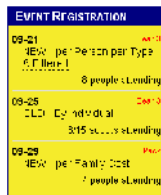
Many features of your SOAR website are turned off by default. To turn on the Event Signup feature, first make sure you are logged into your SOAR website with an account that has Administrative permissions. Then go to Admin/Control Panel/Features. You will see a section that looks like this.



Check the Event Signup checkbox to turn on the feature and click Save Feature Settings button at the bottom.

You also have a choice of the following options.

Home Page Section – This is checked by default. This option will put an Event Registration block on the Home Page. This will help draw member’s attention so that they will register for open events. This block will also include configuration options such as registration cutoff date and maximum number of attendees.



Leaders Administration – This is not checked by default and is a system wide setting. If this option is selected then the shared “leader” account and those individual accounts with “Add Content” permissions will be able to setup and administer Event Signup for individual Events. Having a leadership position defined in the Roster (i.e. Den Leader, Committee Members) has NO effect on the ability to setup or administer Event Signup.

Admin Delete – This is not checked by default. Option will allow event administrators to delete existing registrations. Under normal conditions you will not

need this feature as you probably want to keep this information for historical purposes. Occasions may arise where an individual registration becomes orphaned (through Import or account recreation) where you can use this feature to remove it. Ideally you should turn the feature On, remove the registration, and turn the feature back off. If you leave the feature on permanently you run the risk of accidentally removing valid registrations.

Edit Own Registration – This is not checked by default. This option is configurable on a per event basis and will become the default for that option. This setting does not work for those using shared accounts – otherwise people would be able to edit other’s registrations. This option will allow members using individual accounts to edit/change a registration they have already made from the Attendee List page. If this option is not checked then only those with event management permissions can change registrations.

Filter by Den and Filter by Patrol – This is not checked by default. This option is configurable on a per event basis and will become the default for that option. This setting will limit the Roster members that can register for a specific event based on the Den/Patrol filters assigned to the event. If the Pack or Troop filter is assigned to the Event than anybody in the Roster can register for the event, independent of what other Dens/Patrols are attached to the event. If only a Den/Patrol filter is assigned, then only the Scouts and Adults associated with that group will be able to register for the event.

Once you enable Event Signup, those with event management permissions will see a ‘signup admin’ tab on each event. You use this tab to setup/configure registration for an individual Event.

Event Signup Administration

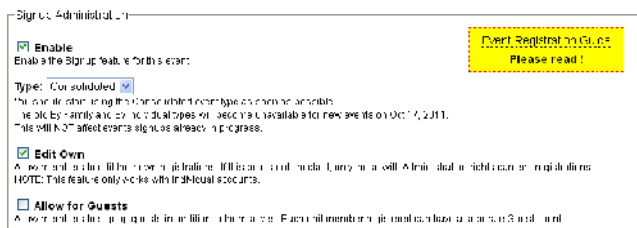
To see and access the ‘signup admin’ tab for an individual event you will need one of the following:

- Those that always have access
 - The ‘admin’ shared account
 - Any individual account with Administrative permissions added
- With the Leaders Administration option set at Admin/Control Panel/Features
 - The ‘leader’ shared account
 - Any individual account with Add Content permission added.
- An individual account that has been given permission from within the ‘signup admin’ tab of the event.

Event Signup Configuration

Once you have enabled Event Signup, you can add event registration to an individual event.


Use the ‘signup admin’ tab on the Event to enable and configure options for event registration.



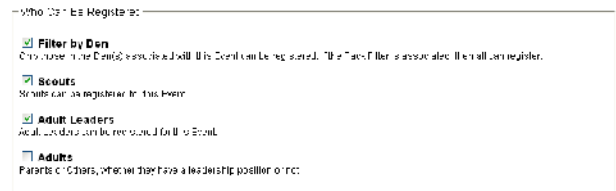
Enable - Without the Enable box checked, you cannot access any of options. Once the Enable box is checked, this enables registration for this event and provides access to the other registration options.

Type – this is a legacy option for the old By Family and By Individual event types. Moving forward there will only be the Consolidated event type.

Edit Own – The default for this setting comes from the *Edit Own Registration* option at Admin/Control Panel/Features. You can override that setting for an

individual event. If this feature is on, individual accounts will see an Edit icon  next to family member’s names on the Attendee List. They can click the Edit icon to modify their current registration.

Allow for Guests – This option allows members to indicate the number of guests on the registration form. If this option is not used, registration will be limited to those named members in the Roster. Guests are a numerical value that can be assigned to each member in the registration.

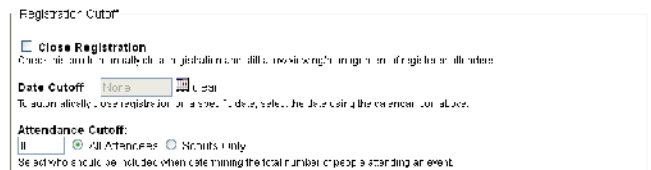


Filter by Den and Filter by Patrol – The default for this setting comes from same option at Admin/Control Panel/Features. You can override that setting for an individual event.


Scouts – Use of this checkbox will allow Scouts to be registered for events. This option is checked by default.

Adult Leaders – User of this checkbox will allow any adult (Parent or Other) with an assigned Adult Leadership Position to be registered for events. This option is checked by default.

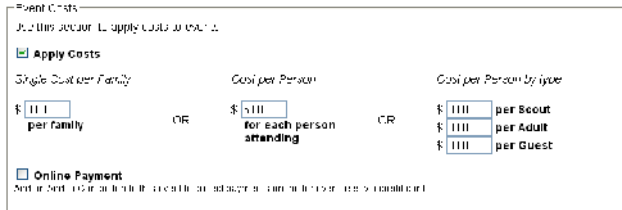
Adults – Use of this checkbox will allow any adult (Parent or Other) to be registered for events. This option is checked by default.



Close Registration – This will manually close the registration for this event. If this box is checked, members will not be able to add new registrations or edit existing ones.

Date Cutoff – The default close date for registrations is the Start Date of the event. If you would like to close registration prior to that, you can select a date here. This is useful when you need more advanced notice for planning an event. Click on the calendar icon  to set a cutoff date. Click on the Clear button to remove the setting.

Attendee Cutoff – Some events have a maximum number of attendees. You can use this numerical field to set the maximum number that can register. The number can be in terms of Scouts, where the number of Adults does not get counted, or All Attendees where each person attending (Scout, Adult, and Guests) get counted toward the maximum.



Event Costs
 Apply Costs
 Single Cost per Family
 Cost per Person
 Cost per Person by Type
 Online Payment

Apply Costs – This option enables the display of costs for the event or use Online Payments. This will enable the Event Costs section for configuration

Support for the following event pricing is supported. You can only use one of these costing models at a time.

Per Family – There is a single flat cost per family. It does not matter how many family members (or guests) attend - the prices is fixed at a single cost.

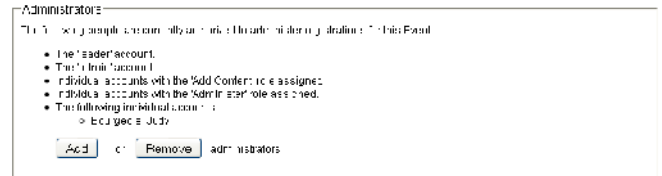
Per Person – There is an individual price for each person that attends. Each person that attends gets charged the same amount. This includes guests.

Per Person Per Type – There is an individual price for each person that attends. Each person that attends gets charged. The price per person varies depending on if the member is a Scout, Adult, or Guest.

Online Payments – This option is only available if you have setup Online Payments at Admin/Control Panel/Online Payments/Setup. Check this box if you

want to accept online payment via credit card or PayPal account for this event. This enables the “Add to Cart” button on the registration confirmation page.

If you have made changes to the settings, make sure to use the Save button to store the changes.



Administrators
 administrators

Administrators – Use the Add/Remove buttons to manage members who can access event administration for the event. This section will also describe exactly who can currently administer the event.


Registration Management


Once registration is enabled for an event, there is a number of management tasks that administrators will need to perform.

Registering others – It is common that an event administrator will need to register someone other than themselves. If you are in Shared Account mode this is done through the standard process – pick the appropriate family member name. If you are in Individual Account mode, you will see a third registration button called “Register Others” than you can use for this purpose.



or or for this event.

Modifying existing registrations – This can be done from the Attendee List tab on the event. Click the Edit icon  next to the registrant’s name. This will bring you back to the registration page for this family, where you can make changes.

Delete Registrations – If you have the Admin Delete option turned On, you will see the Delete icon  next to each registration on the Attendee List page. This can be used to delete the registration from the event. The individual will then be shown as unregistered.

Paid Registration – There is a checkbox next to each registration on the Attendee List page that has a cost. Only authorized event administrators see this checkbox. You can use this checkbox to record when you receive payment from the member. Use the Record Payments button at the top/bottom of the page to save changes.

Registration reporting – A big part of event management is using the information gathered by the registration process. This is done through the Attendee List page of the event.

From this page you can

- Report on those that have registered
- See who is attending and who is not
- View who has not registered yet
- Print a report, including contact information.


Registration Reports

The ‘attendee list’ tab of an Event has many options to view the current state of registrations for the Event.

Attending - Scouts						
Name	Date	Type	Cost	Paid	Notes	
...

Attending - Scouts

Each report contains “sections” of attendees that are grouped together based upon their type and registration response. Each section may be opened or closed by clicking on the title of the section. By default the section for Adult Regrets is always closed.

Registered:	<u>Name</u>	<u>Date</u>	<u>Family</u>	<u>Den</u>	
Not Registered:	<u>Name</u>			<u>Den</u>	

The first category of Repots is Registered – those that have used the online registration process to indicate if they are/are not attending the event.

1. By Name

- This is the default.
- Sections for Attending Scouts, Attending Adults, Regrets Scouts, and Regrets Adults.
- Sorted alphabetically by Last Name, First Name within each section.

2. By Date

- Same as By Name but ordered by date of registration, earliest first.
- This can be used in case there is a cutoff issue to determine who registered first.

3. By Family

- The separation sections for Attending vs. Regrets and Scouts vs. Adults can often skew the view of a family unit.
- This report has a single section that groups all family members together.
- Each member has a date of registration, indicating Registered, or “not attending”.

4. By Den

- For Packs, it is often necessary to look to a smaller grouping for event management.
- A separate section for each Den.
- Each section will include Scouts (attending or regrets) and Parents (attending or regrets). For families with multiple Scouts, the Parents will only be listed with one child to avoid confusion.
- A final section will include all those not currently associated with a Den.

4. By Patrol

- A separate section for each Patrol.
- Patrol sections will only include Scouts.
- Two final sections will include Attending Adults and Regrets Adults.

The second category of Repots is Not Registered – those that have not gone online and indicated they are attending or not attending. These reports can be used to track down those that still need to respond.

1. By Name

- Separate section for Scouts and Adults
- Sorted alphabetically by Last Name, First Name
- Includes Den/Patrol name for Scouts
- Includes Youth or Adult Leadership positions in the Notes field

2. By Den/Patrol

- Same as By Name
- Sorted by Den/Patrol for Scouts

Each section of the Attendee List contains summaries that give valuable high level information: total attending, total regrets, and total costs.


Attending	3	\$6.00	\$2.00
Regrets	2		

Online Payments

To enable members to use credit cards or PayPal accounts with an individual event, you need to:

1. Have a PayPal account for your unit.
 - Make sure to read the section at Admin/Online Help/Features/Online Payments/PayPal before doing this.
 - Make sure to link the PayPal account to your unit checking so you can get money out.
2. Online Payments setup on your SOAR website.
 - Admin/Control Panel/Online Payments/Setup
3. Registration configured for the Event
 - The following options checked/set on the 'signup admin' tab for the specific event
 - Enable
 - Apply Costs
 - A cost defined in one of the three options
 - Online Payment

Once all of these conditions are met, your members will be able to pay for an event registration in two places:

1. During the registration process using the "Add to Cart" button on the confirmation page.
2. After registration on the Attendee List page using the "Add to Cart" icon  next to their name.

When the "Add to Cart" button/icons are used, the item will be added to the shopping cart within your SOAR website. If the member's shopping cart contains items, they will see a "View Cart" button within the User Block.



Shopping Cart

#	Item	Details	Total	
1	[Event] NEW cor Family Coct Sep 29, 201	[Type] Family @ 5:41 PM [Member] [S] Kyle Smith, [A] John Smith [Scouts] 1 [Adj.] *	\$25.00	X
			\$25.00	



From the shopping cart page members can remove items or Checkout. Using the Checkout button will bring members to the PayPal page for your unit.



On the PayPal page, members have three options:

1. Pay using a PayPal account.
2. Pay using a Credit Card.
3. Return to your SOAR website via the "Cancel" link.

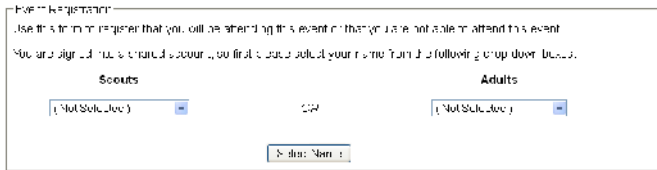
When a transaction is completed the email address for the PayPal account will receive an email containing the transaction details - as shown in the shopping account.

This information can then used to mark the registration as paid on the Attendee List of the event.

Note: You can setup an Email Alias on your SOAR website to simplify transition of the PayPal account to future leaders, i.e. paypal@<domain name>. Use this email address when setting up your PayPal account initially. **DO NOT** use an Email List for the PayPal email address. PayPal has specific security it includes within its emails. An Email Alias passes the email through untouched. An Email List however changes the contents of the email and can affect deliverability of PayPal emails.

Shared Account Registration

If your members are using Shared Accounts to login, they will have to select their name from a drop down box to initiate the event registration process. They will see the screen below to select a name.



The options you select in the 'signup admin' tab will affect which names display in these drop down boxes.

Scouts

- Will display if the *Scout* option is selected.
- Will display a list of all scouts if the *Filter by Den/Patrol* option is not selected OR if the Pack/Troop filter is associated with the Event.
- If *Filter by Den/Patrol* is selected, then only those Scouts in the Dens/Patrols associated with the Event will displayed.

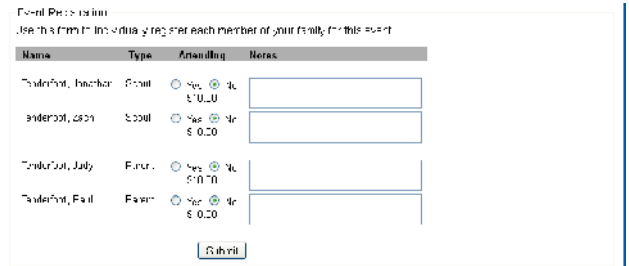
Adults

- Will display if the *Adults* option is selected.
- Will display a list of all adults if the *Filter by Den/Patrol* option is not selected OR if the Pack/Troop filter is associated with the Event.
- If *Filter by Den/Patrol* is selected, then only those Adults with Scouts in the Dens/Patrols associated with the Event will displayed.
- Will display if the *Adult Leaders* option is selected. Will display any adult (Parent or Other) with a leadership position defined in the Roster.
- Note: the *Adult Leaders* option will override the *Filter by Den/Patrol* option for adults.

Members can select the name of a Scout or an Adult in the same family. The registration will work the same for either selection.

Individual Registration

If your members are using Individual Accounts to login, they skip the "pick a name" page used for Shared Accounts and go directly to the main registration page.



By default, the registration page will:

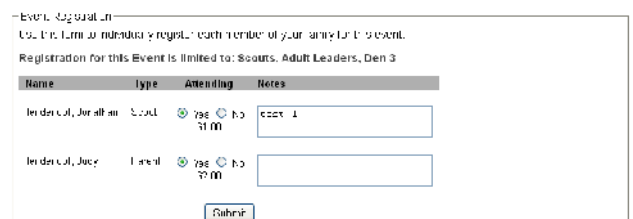
- Display all scouts in the family
- Display all adults in the family
- Default all members to Not Attending

Members can then select Yes for those members that will be attending and add Notes for any specific family member.

The options you select in the 'signup admin' tab will affect which names are listed for registration. The same rules from the previous section apply for if Scouts or Adults are shown for registration.

An example of a more complex configuration:

- One parent Judy who is a Den Leader.
- One parent Paul who is not a leader.
- One scout Jonathan who is in Den 3.
- One scout Zach who is in Den 5.
- The Event is associated with Den 3.
- The Event is NOT associated with the Pack.
- The *Filter by Den* option is checked.
- The *Scouts* and *Adult Leaders* option is checked.
- The *Adults* option is NOT checked.



Only two of the family members would be listed on the registration page. Jonathan because he is a member of Den 3. Judy because she holds a leadership position.

Note that the “qualifications” for who can register are displayed for information purposes on the page.

If the Adults option is selected, then three family members would be listed. Paul would be added to the list because he is an adult (Parent). Zach would still not be listed because of the *Filter by Den* option.

If the individual account does not have any family members that is qualified to attend, they will not see the Register/Regrets button at all. Instead they will see a message that indicates why they cannot register.




Registration Availability

Members will be able to register for events if the following conditions are met.

1. The *Enable* option is checked.
2. It is before the Start Date of the Event.
3. It is before the *Date Cutoff* option, if set.
4. The *Close Registration* option is NOT checked.
5. Existing registrations do not exceed the *Attendance Cutoff* option.

Then all the Who Can Be Registered options determine who can/cannot register for the event.

Registration Export


Authorized administrators will see an Export icon  on the Attendee List page, next to the Print icon.

This will allow you to download an Excel spreadsheet that contains three separate tabs

- Attending
- Not Attending
- No Response

Edit Own

To use this feature each member must be logging into your SOAR website with their own Individual Account **AND the setting at Admin/Control Panel/Membership must be set to Individual Accounts.**

Once that is all set, members will be able to go to the ‘attendee list’ tab of an event and use the Edit icon  to edit an existing registration. They will only be able to edit registrations for their own family members.

Attendee - Scouts

Name	Date	Type	Cost	Paid	Notes
Doe, Rylee	10-13-11 07:00	scout	\$25.00		
Ross, Teagan	10-13-11 07:00	scout	\$25.00		
Rantagh, Andre	08-08-11 17:00	scout	\$25.00		
Smith, Kyle	08-12-11 18:00	scout	\$25.00		
Lencertoot, Jonathan	10-13-11 07:30	scout	\$25.00		
Attending		5	\$125.00	\$0.00	

When editing a registration, they will also see a warning that they will be modifying an existing registration.

Event Registration

Use this form to individually register each member of your family for this event.

A registration has already been completed for your family. Clicking the Submit button will change that registration.

Name	Type	Attending	Notes
Lencertoot, Jonathan	Scout	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Lencertoot, Zach	Scout	<input type="radio"/> Yes <input checked="" type="radio"/> No	

The Edit Own option for members will NOT be available under the following conditions.

- If the event date has already occurred
- If registration is manually closed
- If the Date Cutoff has passed

If you have an Attendee Cutoff set and registration is over that cutoff, members will be able to edit their own registration. They will receive the following message.

Event Registration

Use this form to individually register each member of your family for this event.

The maximum number of attendees for this event have already been registered. Modifying this registration may open up registration to go over the maximum number of attendees. A registration has already been completed for your family. Clicking the Submit button will change that registration.

Name	Type	Attending	Notes
Lencertoot, Jonathan	Scout	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Lencertoot, Zach	Scout	<input type="radio"/> Yes <input checked="" type="radio"/> No	

Administrators will always be able to edit registrations.

Common Issues

Using event registration for a “non event”

A traditional event like a campout has a defined Start Date and End Date. The start date would be Friday and the End Date would be Sunday. Registration for the event closes on Friday because once the event has started, you can no longer register for it.

If you are using event registration for an event like “Annual Dues” make sure you are not setting the Start Date as the date when Annual Dues will be accepted. This will close out registration on the first day of registration 😊 For “non events” it is often best to keep the Start and End Date the same – the LAST day the registration is due. Using the “no time” option for the event will also make it clearer this is an Action not an Event.

Using individual accounts but can't access Edit Own

If you are using individual accounts for members to login with, but can't access the Edit Own checkbox on the 'signup admin' tab for an Event there is an easy fix. Go to Admin/Control Panel/Features and change the site setting to Individual Accounts.

Have trouble entering Event Costs?

Use the refresh/reload button in your browser. Often browsers will cache parts of the page. The refresh/reload button will make sure you are getting the most current page along with all the recent updates.

Frequently Asked Questions

Should I disable Event Signup after an Event is over?

No. This will remove all registration information. Once an event is over you do not need to do anything. With Event Signup enabled your website will keep a record of who attended the event.

Can I switch between old and new registration types?

No. If you must, delete the current event and recreate it with the new Consolidated event type. You will lose existing registrations though, so be careful in doing this.

Will there be further development of the By Family and By Individual event types?

No. The By Family and By Individual event types are now considered legacy features. We will not be making any updates to them. All new features will be added to the Consolidated event type.

Can I use Event Signup for events that are open to the public?

No. The current Event Signup feature draws names directly from the Roster, so it is unable to handle public registrations.

If I have already setup a By Family or By Individual event registration prior to October 17th what will happen to it?

Nothing. It will function as normal for the “life” of its registration. After registration closes it will still have the Attendee List available for historical purposes.