Creating and Editing Programs
User Guide

Contents

About Programs

This section contains background information about programs in Doubleknot. The following topics are covered:

- [What is a program?](#)
- [About programs, sessions, and session events](#)
- [Individual vs. group signup](#)
- [Before you start](#)

What is a Program?

A program is a special kind of event that supports a range of advanced features for configuration and registration, including the following:

- **Signup for activities**. Programs allow you to create a list of classes and activities that registrants can choose to attend at different time periods. For example, if you offer an educational conference, registrants can sign up for different workshops and panels when they register.
- **Recurring sessions**. Programs allow you to create multiple sessions that offer the same classes and activities. For example, if you offer a weekly summer camp that has the same options every week, you can create the camp as a program. Once you create the first session, all following sessions will have the same characteristics (cost, activities, etc.) so you don't have to keep entering the same information again and again.
- **Classes**. If your program contains classes, you can assign instructors, print attendance rosters, and manage attendance online.
- **Group signup for activities**. Programs can be configured for group signup, which allows the registration owner to select activities for every member of the group. For example, if you offer programs for scouts, a leader can sign up all the members of the group at the same time.
- **Facilities**. In group signup programs, you can allow groups to choose a facility. Capacity management features ensure that facilities are not overbooked.
- **Reserve a block of space**. Group signup programs can be configured to allow registration owners to reserve a block of space for their group and name the attendees later. For example, a scout camp might want to allow groups to reserve space for the following year, even if the leader doesn't yet know which youth will be attending.
- **Display the total capacity and the number of available spaces**. Customers can view the total capacity and the number of spaces available in the session and its activities before they begin to register.

About Programs, Sessions, and Session Events

The following are the main elements of a program in Doubleknot:

- **Program information**. When you first set up a program, you will enter general information about the program including the range of dates in which the program occurs, whether the program is set up for group or individual registration, and the text that is displayed to help registration owners during the registration process.
- **Session information**. Each session occurs during a specific date range. Visitors to your web site will register for the session or sessions that they want to attend. For each session, you can specify registration beginning and ending dates, registrant costs, registrant types, price groups, payment schedules, and more. All programs must have at least one session.
- **Sessions events information**. Session events are the specific classes or activities that people register for within a session. For example, if you are hosting an educational conference, the workshops and panels that registrants sign up to attend will be set up as session events. Or, if you're holding a camp where groups can attend a different activity every afternoon, the activities that they can choose from will be set up as session events.

Individual vs. Group Signup

Programs can be configured for individual signup or for group signup.

Individual Signup

To the customer, registering for individual signup programs is similar to registering for Calendar Activity events, with the added feature of signing up for specific classes, tracks or activities.

Selecting activities for a registrant in an individual signup program. When you click Add, the person will be signed up for the Animals and Adaptation track.

Group Signup

Group signup is appropriate for programs where groups of attendees from the same organization will be attending together. For example, you'd use group registration for a scouting event where a troop leader will register all attending troop members at the same time. Group signup supports a range of additional registration options that allow registration owners to:

- Reserve a block of space for attendees who will be named later.
- Sign up all the members of their group for activities.
- Choose a facility for their group.
- Check for scheduling conflicts in the activities that group members are signed up for

Group signup programs use Quick Links buttons to make it easy for registration owners to keep track of the registration process.

Registration for group signup programs uses Quick Links buttons to simplify registration.
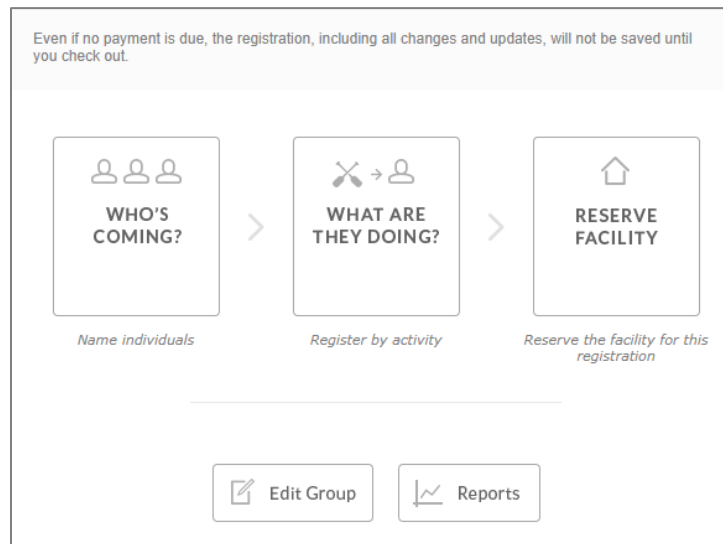
Before You Start

Before you begin configuring a program, make sure that you know all of the program parameters, including program and session details, signup options, available activities, associated costs, and facilities. The Program Configuration Worksheets at the end of this document can help you keep track of all the information you need to enter.

Program Configuration Examples

This section contains examples of different kinds of program configuration:

- [Example: Weeklong Summer Daycamp with Different (Individual Signup)](#)
- [Example: Two-Day Conference Where Attendees Sign Up for Workshops (Individual Signup)](#)
- [Example: Scout Camp for Groups (Group Signup)](#)

Example: Weeklong Summer Daycamp with Different (Individual Signup)
In this example, we are setting up a nature and science daycamp that runs from June 29, 2020 to August 14, 2020. There are seven sessions of the camp, and each session is one week long. Within each session, children will sign up for a specific daycamp—Physics of Flight, Animals and Adaptations, Outer Space Exploration, or Magnetism & Electricity. There is a single flat fee for the daycamp, and no additional or different charges for the different kinds of daycamps. To create this program, you would:

1. Create the program Nature and Science Daycamp 2020 as an individual signup program. Instructions are located in [Configure an Individual Signup Program](#).

Creating an individual signup program

2. Create the first session. The session is the Calendar Activity event that will be displayed in the calendar for customers to sign up for. Because there is a flat fee no matter what daycamp option is selected, you can set the registration costs here instead of in the session events. Instructions are located in [Create the First Session.](#)
3. Create the session event group for the topics that children will register for. In this example, the session event group will be called Educational Tracks. Instructions are located in [Create Session Event Groups and Session Events](#).
4. Create the individual daycamp session events. The dates of each session event are the full five days of the daycamp session. Instructions are located in [Create Session Event Groups and Session Events](#).

Setting up session events for a summer daycamp

5. Paste the program URL into a browser in which you're not logged in to Doubleknot, and test the program and registration process as a user. Instructions are located in Test Program Configuration.
6. If the information for the session and session events is correct, create additional sessions and update the names and dates. All activities from the first session will be carried over into the new sessions. Instructions are located in Create Additional Sessions.
7. If you need to modify information in a single session, such as to reduce fees for the week that contains July 4, edit the session and choose to edit only this occurrence so the changes are only applied to that session.
8. Test all aspects of the program and registration, and make any necessary changes. Instructions are located in Test Program Configuration.
9. When the program is configured correctly, take the sessions out of Test Mode to display them on the calendar.

Example: Two-Day Conference Where Attendees Sign Up for Workshops (Individual Signup)

In this example, we are setting up a two-day professional conference for adults. Each day of the conference contains a set of morning workshops and a set of afternoon workshops. Attendees should choose one morning and one afternoon workshop each day from the list of workshops. There is a single flat fee to attend the conference. To set up this program, you would:

1. Create the program 2020 Nonprofit Fundamentals Conference. Instructions are located in Configure an Individual Signup Program.

Configuring an individual signup program

2. Because the conference only occurs once, there will only be one session. Create the session with the same dates as the program. Instructions are located in [Creating the First Session](#).
3. In the session, create session event categories for Thursday Morning Workshops, Thursday Afternoon Workshops, Friday Morning Workshops, and Friday Afternoon Workshops. Instructions are located in [Creating Session Event Groups and Session Events](#).
4. In each of the session event categories, create the session events for the workshops, being sure to enter the correct dates and times. Instructions are located in [Creating Session Event Groups and Session Events](#).
5. Paste the program URL into a browser in which you're not logged in to Doubleknot, and test the program and registration process as a user. Instructions are located in [Testing Program Configuration](#).
6. If the information for the session and session events is correct, create additional sessions and update the names and dates. All activities from the first session will be carried over into the new sessions. Instructions are located in [Creating Additional Sessions](#).
7. Test all aspects of the program and registration, and make any necessary changes. Instructions are located in [Testing Program Configuration](#).
8. When the program is configured correctly, take the sessions out of Test Mode to display them on the calendar.

Selecting workshops for an educational conference. The registrant Laurie Blake is signed up for two Friday workshops. Currently, the registrant is selecting from the list of Saturday Intensive Workshops. When the registrant clicks the Add button, the workshop will be added to their schedule.

Example: Scout Camp for Groups (Group Signup)
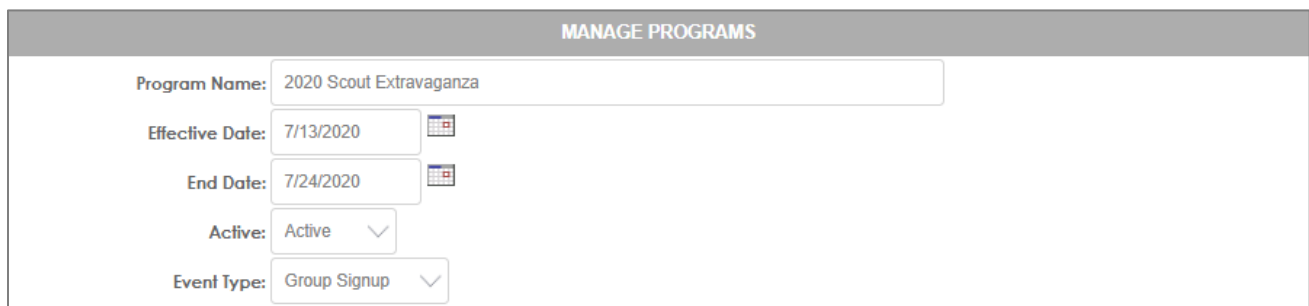
In this example, we will set up a scout camp with the following characteristics:

- There are three weekend-long sessions
- Participants will attend activities as a group
- Leaders can sign up their troop in advance and provide the participant names later
- Troops must choose the facility that they will sleep in
- The session event categories are Folklore, Hiking, Horseback Riding, Knot-tying, and Ropes Course, with multiple activities in each category

To set up this program, you would:

1. Create the program with the following options (Instructions are located in Configuring a Group Signup Program):

   - Registration owners can reserve a block of space
   - Facilities are required
   - Signup is by group, not by individual
   - Doubleknot should check for scheduling conflicts

   Entering general information for a group signup program.
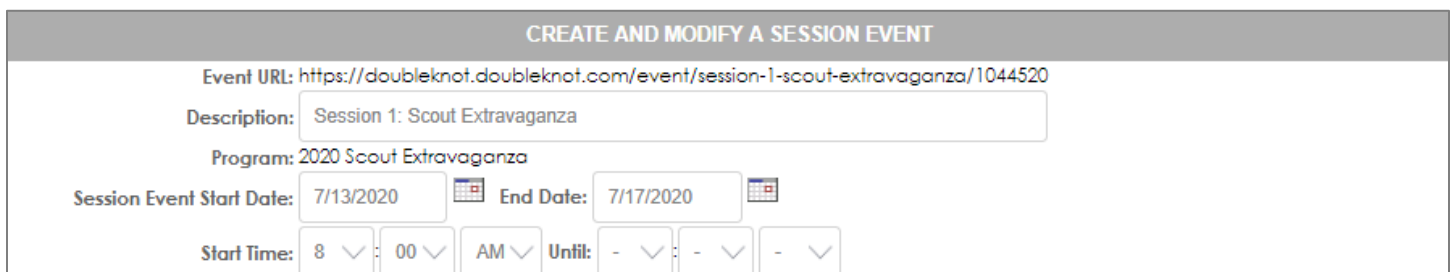
2. Set up the facilities and associate them with the program. Instructions are located in Working With Program Facilities.

3. Create the first session with the beginning and end dates of the first weekend of the program. Instructions are located in Creating the First Session.

   Creating the first session

4. Set up the session event categories and session events. Instructions are located in Creating Session Event Groups and Session Events.

Setting up session events

MANAGE SESSION EVENTS				

🗎 **New Session Event Group**   2020 Scout Extravaganza

Session Event Group		Description	Starting	Ending	Actions
Folklore (Session Eve..	🗎📝🗑	**Learn Area Folklore**	7/13/2020 9:00 AM	7/13/2020 11:00 AM	📝🗑🗎👤
Hiking (Session Event)	🗎📝🗑	**Learn Area Folklore**	7/13/2020 1:00 PM	7/13/2020 3:00 PM	📝🗑🗎👤
Horseback Riding (Ses..	🗎📝🗑	**Learn Area Folklore**	7/14/2020 9:00 AM	7/14/2020 11:00 AM	📝🗑🗎👤
Knot Tying (Session E..	🗎📝🗑	**Learn Area Folklore**	7/14/2020 1:00 PM	7/14/2020 3:00 PM	📝🗑🗎👤
Ropes Course (Session..	🗎📝🗑				

5. Test all aspects of the program and registration, and make any necessary changes. Instructions are located in Testing Program Configuration.
6. If the program is configured correctly, create the additional sessions. Instructions are located in Creating Additional Sessions.
7. Test the complete program. Instructions are located in Testing Program Configuration.
8. When the program is configured correctly, take the sessions out of Test Mode to display them on the calendar.

Create and Save a Program

This section contains basic information about creating, saving, and editing programs. Detailed information about configuring programs is located in [Configure an Individual Signup Program](#) and [Configure a Group Signup Program](#).

Before You Start

Before you create a program, you should gather all the information that you need to enter. Use the [Program Configuration Worksheets](#) at the end of this document to make sure that you have all the necessary information about the program.

Basics

Display the Main Programs Page for an Organization

To display the PROGRAMS page for an organization, follow these steps.

1. Log in and display the main Doubleknot page.
2. On the left-hand side of the page in the ADMINISTER heading, click **Event Management**. Navigation tabs for all available Event Management features will be displayed.
3. In the ORGANIZATION menu, select the ORGANIZATION whose program you wish to work with.
4. Click the **Programs** tab. The main PROGRAMS page for the organization will be displayed.

Programs page for an organization

Create a New Program

To create a program, follow these steps:

1. In Event Management, click the **Programs** tab.
2. If you want to create the event within a specific organization, select the name of the organization from the ORGANIZATION pop-up menu above the navigation tabs.
3. At the right side of the page above the list of events, click **New Program**. The MANAGE PROGRAMS page will be displayed.
4. Follow the steps in [Configure an Individual Signup Program](#) or [Configure a Group Signup Program](#).

Save a Program

To save changes to a program, follow this step:

1. At the bottom of the page, click **Save**. The information you entered or changed will be saved.

Return to a Program

To return to a program, follow these steps:

1. At the main Programs page, select the organization and locate the program you wish to edit using these options:

   - In the ONLY SHOW section, select whether to show only **Current and Future** programs; **Past** programs; or **All** programs.
   - In the PAGE SIZE pop-up menu, choose the number of programs to display per page.

- To sort the programs alphabetically, click the **Description** heading.
- To sort the programs by start date, click the **Start Date** heading.
- To sort the programs by end date, click the **End Date** heading.
- To search for a program by name, enter a word or a few letters in the Search field, and click **Search**.

2. When the program you wish to edit is visible, click **Details** at the right of the program's name. The MANAGE A PROGRAM page for the program will be displayed.
3. In the panel at the left of the MANAGE A PROGRAM page, click **Edit Program**. The MANAGE PROGRAMS page for the program will be displayed.

Individual Signup Program

To configure a program for individual signup, follow these steps:

1. At the PROGRAMS page, click **New Program**. The MANAGE PROGRAMS page will be displayed.
2. In the PROGRAM NAME field, enter the name of the program (e.g., Nature and Science Daycamp 2020).
3. In the EFFECTIVE DATE field, enter or select the date of the <u>first</u> day of the <u>first</u> program session.
4. In the END DATE field, enter or select the date of the <u>last</u> day of the <u>last</u> program session.
5. In the EVENT TYPE menu, select **Individual Signup**.
6. In the INSTRUCTION FOR ACTIVITY SIGNUP field, enter instructional text that will be displayed registration owners on the page where they select activities for each registrant.
7. If each registrant must sign up for a minimum number of classes or activities, enter the number in the MINIMUM NUMBER OF CLASSES THAT MUST BE REGISTERED FOR field.

    NOTE: To ensure that registrants sign up for at least one class or activity, enter **1**. If it is registrants are not required to sign up for activities, leave the entry **0**.

8. At the bottom of the page, click **Save**. The program will be created and the PROGRAMS page will be displayed.

The next step is to create sessions for the program. Information is located in <u>Understanding Sessions</u>, <u>Create the First Session</u>, and <u>Create Additional Sessions</u>.

Creating a new program with individual signup for activities

Group Signup Program

Group Registration Options

For group signup programs, the following features are available.
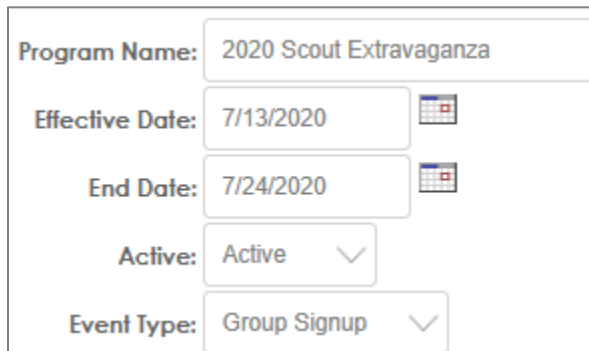
- **Require Facility**. If one or more facilities are assigned to the program, you can require registration owners to select a facility during registration.
- **Limit Registration Changes**. If you allow registration owners to update their registrations, this feature allows you to control whether updates can include changing the number of registrants.
- **Registrants and Classes**. To make it easier for people who register large groups, you can allow registration owners to save their session event selections to complete later even if they don't complete the checkout process.
- **General Instructions for Registration Home Page**. This information is displayed on the program's main registration page.
- **Register Page**: These items are displayed on the central program registration page.
  - **Reserve Block**: If this option is enabled, registration owners can reserve a block of space and provide the names of participants later. If this option is not enabled, registration owners must provide the participants' names at the time of registration. Enabling this feature is useful if you are setting up a program in which groups can reserve space a long time before the program begins, like a conference that accepts preregistrations or a scout camp that accepts registrations a year or more in advance.
  - **Name Individuals**: If this option is enabled, registration owners can enter the names of participants at the time of registration. If you're allowing groups to reserve space far in advance when they are unlikely to know registrant names yet, you might disable this option until closer to the time of the program. Or, if your program doesn't require registrant names, you can disable this option and never enable it.

    NOTE: If you initially disable this option but want registration owners to return later to name individual participants, be sure to enable registration modifications at the session level so that registration owners can return to name individuals.

  - **Both**: Registration owners can choose to reserve a block of space or name individuals.
- **Signup Method**.
  - **Signup by Individual (Recommended).** Registration owners will select an individual in their group and sign them up for activities.
  - **Signup by Activity**. Registration owners will select an activity first, and then sign up people in their group.
- **Activity Signup Page**. If this option is enabled, registration owners can sign up participants using the previously selected signup method. Of the activities that you will offer are not fully confirmed when registration begins, you can disable this option. If you disable this option initially but want registration owners to be able to sign up for activities at a later date, you must enable registration modifications at the session and session event levels so that registration owners can return to sign up participants for activities.
- **Check for Scheduling Conflicts**. To ensure that registration owners don't sign up participants for activities that overlap, you can choose to automatically disallow conflicts (recommended) or display a conflict resolution page that must be completed before the registration continues.
- **Facility Selection**. This feature is only available if facilities are assigned to the program. If this option is enabled, registration owners can select facilities for their group. If this option is not enabled, registration owners can not select facilities for their group. If you're allowing groups to reserve space far in advance, you might disable this option until you are certain which facilities and bundles will be available for the program. If you disable this option initially but want registration owners to be able to select a facility later, be sure to enable registration modifications at the session level so that registration owners can return to select facilities when the feature is enabled.
- **Edit Group Form Page**. Text that you enter here will be displayed on the Forms page during registration.
- **Attendance Note**. If you plan to generate certificates of attendance or completion, enter the information here. Complete information on using this feature is located in SOMETHING.

Create a Group Signup Program
To create a program with group signup, follow these steps:

1. At the Programs page, click **New Program**. The MANAGE PROGRAMS page will be displayed.
2. In the PROGRAM NAME field, enter the overall name of the program.
3. In the EFFECTIVE DATE field, enter or select the date of the first day of the first program session.
4. In the END DATE field, enter or select the date of the last day of the last program session.
5. In the ACTIVE menu, choose one of the following:
    - To hide session events from public view, select **Inactive**.
    - To make session events visible to the public, select **Active**.
6. In the EVENT TYPE menu, select **Group Signup**.

Entering general information for Group Signup program

Program Name:	2020 Scout Extravaganza
Effective Date:	7/13/2020
End Date:	7/24/2020
Active:	Active
Event Type:	Group Signup

Require the Selection of a Facility
You can configure facilities to be available for groups who register for a program. For example, if your program is an overnight camp, you can configure the program so that groups can choose the cabins where they'll stay.

NOTE: If you want to require registration owners to select a facility, you must assign facilities to the program. Information about setting up facilities for programs is located in Working with Program Facilities.

To require registration owner to choose a facility, follow this step:

1. In the REQUIRE FACILITY menu, select **Yes**.

Requiring a facility

Require Facility:
(enforced only if facility is defined)   Yes

NOTE: If you choose **Yes** for this option, be sure that you display the Facility Selection page option later on this page. Otherwise, visitors to your web site will not be able to complete their registration. More information is located in Allow Registration Owners to Select Facilities.

Limit Changes to the Number of Registrants
To choose whether a registration owner can make changes to the number of registrants after completing registration, follow this step:

1. In the LIMIT REGISTRATION CHANGES menu, choose one of the following:
    - To allow the registration owner to increase or decrease the number of registrants, select **Can Change the Number of Registrants**.
    - To allow the registration owner to increase the number of registrants but not decrease the number, select **Cannot Decrease the Number of Registrants**.
    - To allow the registration owner to decrease the number of registrants but not increase the number, select **Cannot Increase the Number of Registrants**.
    - If the registration owner can not increase or decrease the number of registrants, select **Cannot Change the Number of Registrants**.

NOTE: To ensure that this feature works correctly, you must configure each session to allow registration owners to modify registrants. More information is located in Allow Changes to Completed Registrations.

Allow Registrants and Classes to be Saved Without Checkout

To make it easier for people who register large groups, you can allow registration owners to save their session event selections even if they don't complete the checkout process.

1. In the REGISTRANTS AND CLASSES menu, choose one of the following:

   - **Do not save updated session event selections (classes and activities) unless checkout is completed**
   - **Save updated session event selections (classes and activities) unless checkout is completed**

Enter General Registration Instructions

Text entered in this section will be displayed on the general registration page above the button.

1. In the GENERAL INSTRUCTIONS FOR REGISTRATION HOME PAGE section, enter the general instructions for the registration process.

Entering general instructions for registration

How the instructions appear during registration

Register Page Options

You can allow registration owners to reserve a block of registration space in advance. This allows group leaders to reserve a space for a specific number of registrants even if they don't know their attendees' names yet.

NOTE: If you require or allow registration owners to reserve a block of space, you must configure each session to allow registration owners to modify registration information. Instructions are located in Allow Changes to Completed Registrations.

1. In the REGISTER PAGE section, choose one of the following:

   - **Reserve Block**: If selected, registration owners can only reserve a block of space. They cannot enter registrant names or select activities.
   - **Name Individuals**: If selected, registration owners must name individual participants.
   - **Both**: If selected, registration owners can reserve a block or name individuals.

2. In the LABEL field, enter the text to display on the Quick Links button.

3. In the INSTRUCTIONAL TEXT field, enter registration instructions for the page where participants are identified.

Entering information for registration owners to reserve a space for a group

The label is displayed on the first page of group program registration beneath the Who's Coming button, and at the top of the page where the person enters the number of registrants.

The label text is displayed at the top of the "How many?" page, and the additional

Activity Signup Options

You can choose the way that registration owners select activities for the participants in their group. If you choose **Signup By Individual**, the registration owner selects an individual, and then selects activities for that individual. If you choose **Signup by Activity**, the registration owner selects the activity category and the activity, and then assigns registrants in their group to that activity.

NOTE: We strongly recommend that you select **Signup by Individual**. f

In Signup by Individual, the registration owner selects an individual, and then selects activities for that registrant. Below, the individual is signed up for Geocaching and will be signed up for Photography when the Add button is clicked.

In Signup by Activity, the registration owner selects the activity category or group.

Then, they sign up participants for activities in that category. The registration owner selects an activity from the pop-up menu and adds participants. They repeat the process as many times as needed to sign up participants for all of their activities during the program.

To choose the signup method, follow these steps:

1. In the SIGNUP METHOD menu, select one of the following:

   - **Signup By Individual (Recommended)**
   - **Signup by Activity**

   The text below the ACTIVITY SIGNUP item will display your selection.

2. To show the activity signup page during registration, select **Show This Option**.
3. In the LABEL field, enter brief descriptive information about the option to be displayed on beneath the Quick Links button (or accept the default text).
4. In the INSTRUCTIONAL TEXT field, enter up to 500 characters of instructions (or accept the default text). This text will be displayed on the page where registration owners provide the names of participants.

Activity Signup Page options

Check for Scheduling Conflicts
Doubleknot makes it easy for registration owners to make sure that they haven't signed up registrants for activities that have overlapping times. The following options are available:

- **Automatically check for scheduling conflicts**. After someone is signed up for an activity, they can't be added to any other activity that has a conflicting time. For many programs, this is the easiest and most convenient option.
- **Manually check for scheduling conflicts**. Participants can be signed up for one or more activities with conflicting schedules. If a scheduling conflict exists, registration owners can resolve the conflict by unregistering a participant from a conflicting activity.

If you choose to check scheduling conflicts manually, attendees can be assigned to activities with conflicting times. Below, the yellow highlight shows that the participant is registered for two activities that occur at the same time.

If an attendee is registered for conflicting activities, the registration owner must resolve the conflict by unregistering on this page. They must return to the activity signup page to assign the attendee to additional activities.

To enable checking for schedule conflicts, follow these steps:

1. In the CHECK FOR SCHEDULING CONFLICTS menu, select one of the following:

   - **Automatically.** If you choose this setting, no further steps are required.
   - **Manually.** Continue to step 2.

2. In the CHECK FOR SCHEDULING CONFLICTS PAGE, select **Show this option**. I

Setting the registration to check for scheduling conflicts

3. In the LABEL field, enter descriptive information about the option or select the default. This text will be displayed CHECK FOR SCHEDULING CONFLICTS page.
4. In the INSTRUCTIONAL TEXT field, enter text to help registration owners on the page where they review scheduling conflicts.

Facility Selection Options

If facilities are required for the program, you must allow registration owners to choose the facility for their group. If you hide this option, be sure that you did not require a facility earlier on the page. If you require a facility but remove the option to select a facility, visitors to your web site will not be able to complete their registration.

To allow registration owners to select facilities, follow these steps:

1. In the FACILITY SELECTION page section, select **Show this option**. If you don't want to show the option, deselect the items and go to the next section.

2. In the LABEL field, enter brief descriptive information about the option or select the default. This text will be displayed on the facility selection page.
3. In the INSTRUCTIONAL TEXT field, enter instructional text to help registration owners select facilities for the group.

Facility Selection Page options

Label text is displayed on the Reserve Facility button on the main registration page

Instructional text is displayed on the page where registrants select a facility

Group Forms Instructions

Registration forms are assigned at the session level. If a form is required for each participant, it is displayed on the page where registration owners name the individual participants. If a form is <u>not</u> assigned for each participant, it is assumed to be a form for the group.

If only one group registration form is assigned to the program, it will automatically be part of the registration process. If your program requires more than one group registration form, you can enter instructional text to be displayed on the page where the registration owner selects the form to complete.

To enter information about the forms that must be completed, follow this step:

1. In EDIT GROUP FORM PAGE field, enter information about the forms that must be completed for the program.

Entering information for the Edit Group Form page

Edit Group Form Page: Maximum length of 500 characters (optional)

> Please complete the following forms for this registration.

Information entered in the Edit Group Form Page section is displayed on the Forms page of the registration

GROUP FORMS

Even if no payment is due, the registration, including all changes and updates, will not be saved until you check out. To check out, click Continue and follow the steps to check out and complete the registration.

🔗 STEPS TO COMPLETE THIS REGISTRATION

Please complete the following forms for this registration.

Status	Form
▤	2020 Additional Group Information *
▤	2020 Group Information Form *

* Indicates Required Form

Continue →

Understanding Sessions

Once you've created and entered general information about a program, the next step is to create the individual sessions within the program.

About Sessions

Sessions are the events that your customers will register for. Activities and classes are associated with individual sessions, not with the overall program at large. For example, if you're setting up a summer camp, your sessions might be Week 1, Week 2, etc. If you're setting up a professional conference, you might only have one session because the conference doesn't repeat weekly like some summer camps.

Sessions are configured as Calendar Activity events, so if you've set up Calendar Activity events before, the interface will be familiar to you. When you configure a session, you will enter:

- General information about the session
- Online registration options
- Ticketing and admission options
- Payment options

After you create the first session for a program, all of the following sessions you create will automatically have most of the same attributes as the first session. You can then modify information for individual sessions as needed. And, when you edit an existing session, you can choose to make the change in all sessions or only in the one you selected.

About Session Start Times and End Times

Doubleknot recommends that you <u>do not enter starting and ending times for sessions until you are certain that the times will not change</u>. If you set starting and ending times for a session, create classes or activities, and then change the start or end time for the session, the times for the activities or classes will automatically be adjusted by the same amount, which may not be your intention.

For example, consider a session configured to start at 9:00 AM with classes beginning at 9:15 AM. If you decide that you want the session to start at 8:30 AM to give attendees more time to arrive and check in, changing the session to begin 30 minutes early at 8:30 AM will automatically adjust the classes to begin 30 minute earlier at 8:45 AM. <u>If you must change a session time after you've set up classes or activities, be sure to check all of the class or activity times and adjust if necessary.</u>

About Session Waitlists

Doubleknot supports the use of waitlists at the session level. However, if your program has session events that people will sign up for, in most cases you should set your waitlists for the individual classes or activities instead of for the overall session.

Create the First Session

The steps to create a session are essentially the same steps for creating Calendar Activity events.

Getting Started
To create the first session, follow these steps:

1. At MANAGE PROGRAMS page for the program, click **New Session**. The CREATE AND MODIFY A CALENDAR ACTIVITY EVENT page will be displayed.

Turn Test Mode On and Off
Doubleknot provides a test mode so you can check how the session will appear to your customers without making it visible to the public. Registration information that is entered in test mode is not saved and checkout is not enabled, so you can test different registration options without saving any incorrect registration information for the session. Information about testing your program is located in Testing Program Configuration.

When you create a session, you should turn test mode on immediately so that you don't accidentally publish an incomplete or incorrect program on your web site.

To turn Test Mode on, follow these steps:

1. On the CREATE AND MODIFY page for the session, scroll about halfway down the page to the Test Mode section.
2. In the TEST MODE section, select **On**.

When you are confident that the sessions are configured correctly, turn Test Mode off. As soon as Test Mode is turned off, any registration information that is entered will be saved and checkout will be enabled.

To turn Test Mode off for all of the sessions in a program, follow these steps:

1. At any MANAGE A PROGRAM SESSION page, click **Edit**. A page asking if you want to edit information for all sessions or just the selected session will be displayed.
2. Select **Edit all occurrences and shared attributes**.
3. Click **OK**. A CREATE AND MODIFY page for the session will be displayed.
4. Scroll about halfway down the page to where the Test Mode options are displayed.
5. In the TEST MODE section, select **Off**.
6. At the bottom of the page, click **Save**. Test mode will be turned off.

Enter Session Name, Start Date, and End Date
To enter the name and date(s) for a session, follow these steps on the Create and Modify a page for the session:

1. In the DESCRIPTION field, enter the name of the session to be displayed on the calendar.
2. In the ACTIVITY DATE field, enter the date when the session will occur in the mm/dd/yyyy format. Or, click the calendar to select a date.
3. If the session ends on a different day, enter the end date in the END DATE field, or click the calendar to select a date. If the session occurs on only one day, you can leave the END DATE field blank.

NOTE: As discussed in About Session Start Times and End Times, Doubleknot recommends that you not enter activity times for sessions until you are certain that they will not change.

Add URLS for Additional Information
You may add URLs to the session that link to Web pages of photos or additional information about the program. These URLs will be displayed on the registration details page, which provides information about the program to visitors before they begin the registration process.

To enter additional URLs, follow these steps:

1. In the URL TO EVENT PICTURES field, enter the complete URL (including https://) where photographs from the event will be displayed.
2. In the URL FOR ADDITIONAL DETAILS field, enter the complete URL (including https://) where photographs from the event will be displayed.

Change the Contact Email Address
By default, the Contact E-Mail field will contain the email address associated with the account you used to log in. If someone else should be contacted, enter their full email address in the Contact E-Mail field.

Enter Session Details

You can enter detailed information about the session that includes formatted text, graphics, embedded video, and links to pages on your Web site. If you're only going to have one Web page of information about the session, Doubleknot strongly recommends creating the information here instead of creating a separate page of information elsewhere on your Web site.

In the DETAILS window, use the rich text editor to enter and format the detailed information about the session.

NOTE: If you select **Yes** for SKIP REGISTRATION DETAILS later on this page, this information will not be displayed at the beginning of the registration process. However, the details can be displayed when someone clicks the name or the VIEW DETAILS link for the session on the page of information about the program.

Enter the Session Location

The location that you enter will be displayed on the DETAILS page with a link to a map. To identify the location of the event, enter information in any or all of the fields.

NOTE: If the location doesn't have an exact street address, enter mapping information in the LATITUDE and LONGITUDE fields.

Hide the Session from the Calendar and RSS Feed

By default, the session you create will be displayed in the calendar and on any page that uses the RSS feed for the organization. However, sometimes you may want to keep a session from appearing in the calendar or the RSS feed. If you choose not to display the session on the calendar or the RSS feed, make sure you have a strategy to let people know about the session, such as sending an email to invitees with a link to registration for the session.

To keep a session from being displayed in the calendar and RSS feed, follow this step:

1. In the DISPLAY pop-up menu, select **Do Not Display on Calendar**.

Assign Category Information

Organizations can create different categories for events, including program sessions, in Doubleknot. For example, a zoo might have categories for "Educator Programs," "Summer Camps," and "Winter Camps." If you assign a program session to a category, the program session will be displayed on any web page that uses the RSS feed for that category.

To encourage registration owners to register for additional offerings, you can assign an Upsell Category to a program session. If an upsell category is assigned, items of interest from that category will be displayed to registration owners before checkout, making it easy for them to add additional items to their order.

NOTE: If your organization has configured an integrated checkout donation request in Doubleknot, the checkout donation request will be displayed instead of the upsell category.

To assign an upsell category and/or categories where the program session will appear, follow these steps:

1. To assign an upsell category, select the desired item in the UPSELL CATEGORY pop-up menu.
3. In the CATEGORY 1 pop-up menu, select the first category to which the event is assigned.
4. In the CATEGORY 2 pop-up menu, select the second category to which the event is assigned.
5. In the CATEGORY 3 pop-up menu, select the third category to which the event is assigned.

Set Beginning and End Dates for Online Registration

You can identify dates and specific times that online registration will begin and end. The REGISTRATION END DATE is the only required item in this section.

Best Practice: If you <u>don't</u> set a beginning date for registration, registration will be available immediately. If the event is in Test Mode, it will be visible to the public but they will not be able to complete a registration. **To ensure that the event isn't visible to the public before you're ready, set a REGISTRATION BEGIN DATE in the future.** You can change it later when configuration and testing are complete.

To set online registration dates and times, follow these steps:

1. In the REGISTRATION BEGIN DATE/TIME field, enter or select the date when online registration should begin.
2. If you want to set a specific time for registration to begin, use the pop-up menus select the time that online registration will begin on that date.
3. In the REGISTRATION END DATE/TIME field, enter or select the date when online registration should end.

    NOTE: To enable online registration, you must enter a Registration End Date.

4. If you want to set a specific time for registration to end, use the pop-up menus select the time that online registration will end on that date.

Set Cost and Attendance Limits for Registrations and Registrants

Single Cost Events/Events with Only One Registration Type
The following table describes the cost and attendance options for events that don't have multiple registrant types. To set these options, follow the steps in the **Action** column.

Options for events with a single registrant type

Field	What It Does	Action
REGISTRANT COST ($)	Sets registration cost	Enter the cost. If there's no cost, enter **0.**
MIN REGISTRANTS PER REGISTRATION	Sets minimum number of registrants on a registration	Enter the minimum required number per registration.
MAX REGISTRANTS PER REGISTRATION	Sets maximum number of registrants on a registration	Enter the maximum allowed number per registration
MAXIMUM REGISTRANTS	Sets total event capacity	Enter the overall event capacity.
WAIT LIST SIZE	Sets the size or the waitlist	**NOTE**: if you want to create a waitlist, you must enter a number in the MAXIMUM REGISTRANTS field first. Enter the number of spots on the event waitlist.
EARLY DISCOUNT APPLIED BEFORE EARLY DISCOUNT AMOUNT	Applies an early registration discount before the specified date	• In the EARLY DISCOUNT APPLIED BEFORE field, enter or select the date that the early registration discount will end. • In the EARLY DISCOUNT AMOUNT field, enter the amount of the early registration discount.
LATE FEE APPLIED AFTER LATE FEE AMOUNT	Applies a late fee to registrations submitted after the specified date	• In the LATE FEE APPLIED AFTER field, enter or select the first date on which the late fee will apply. • In the LATE FEE AMOUNT field, enter the amount of the late fee.

Multiple-Cost Events / Events with Multiple Registrant Types
Doubleknot lets you create events with different costs for different types of registrants. For example, your organization might want to charge different event prices for children, adults, and senior citizens. If you set up multiple costs depending on the type of registrant, you can configure the minimum and maximum number of that type of registrant per registration; the maximum number of that type of attendee at the event; and different late fees and early discounts for each type of registrant.

To set options for events with multiple registrant types, follow these steps:

1. In the COST IS PER section, select one of the following:

   - If you want to collect the names of registrants, select **Named Registrant**.
   - If you don't want to collect the names of registrants, select **Unnamed Registrant**.
   - If you want to collect the names of registrants, select **Named Registrant and per Registration**.
   - If you don't want to collect the names of registrants, select **Unnamed Registrant and per Registration**.

2. At the bottom of the list, select **Multiple Cost**. The page will redisplay with new options for assigning costs to different types of registrants.
3. Follow the steps in the table to configure options for the first registrant type.
4. To add another registrant type, click the **Add More** button. A new row will be displayed.

Item	What It Does	Action
AMOUNT	Sets the cost for this registrant type	Enter the cost in the field. If there's no cost for the registrant type, enter **0**.
REGISTRANT TYPE	Identifies the registrant types that people will select from	• If the type is already configured for your organization, select the type from the pop-up menu. • If the type is not listed in the pop-up menu, leave the **Add New->** setting in the pop-up menu and enter the new registrant type in the field to the right.
MIN PER REGISTRATION	Sets minimum required number of this registrant type for each registration	Enter the minimum number of this registrant type required per registration in the field.
MAX PER REGISTRATION	Sets maximum allowed number of this registrant type for each registration	Enter the maximum number of this registrant type required per registration in the field
MAX ATTENDEES	Sets the total capacity for this registrant at the event	To set the overall event capacity for this registrant type, enter the number in this field.
WAITLIST	Set the waitlist size for this registrant type	Enter the number of spots for this registrant type on a waitlist. Using this option requires an entry in MAX ATTENDEES.
EARLY DISCOUNT DATE EARLY DISCOUNT AMOUNT	Before a specific date, apply an early registration discount for this registrant type.	• In the EARLY DISCOUNT DATE field, enter or select the date that the early registration discount will end. • In the EARLY DISCOUNT AMOUNT field, enter the amount of the early registration discount.
LATE FEE DATE LATE FEE AMOUNT	After the specified date, apply a late fee for this registrant type.	• In the LATE FEE DATE field, enter or select the first date on which the late fee will apply. • In the LATE FEE AMOUNT field, enter the amount of the late fee.

To delete a registrant type, follow these steps:

1. Beneath the ACTION heading at the end of the row, click **Delete**. The registrant type will be grayed out. When you save the event, this information will be permanently deleted.
2. If you deleted a registrant type in error, click **Restore**. The registrant type and associated information will be restored.

Set an Age Range for Registrants

You can limit registration for the session to registrants in a specified age range at the time of the session. This feature can be used to set a minimum age and/or a maximum age for registrants. If you set both a minimum and a maximum age, only registrants within that age range can register.

NOTE: The age range applies to the date of the session, not the date of registration.

To set an age range, follow these steps:

1. In the MIN AGE (MONTHS) field, enter the minimum age for registrants in months. For example, if the minimum age is five, enter **60**.
2. In the MAX AGE (MONTHS) field, enter the maximum age for registrants in months. For example, if the maximum age is seven, enter **84**.

Enter Information that Appears on the Registration Receipt

Use the information in the following table to customize the registration receipt.

Event registration receipt options

Field	What to Enter
PERSON NAME ADDRESS CITY STATE POSTAL CODE TELEPHONE	By default, the name, address, and telephone number associated with your profile will be displayed on the receipt at the end of registration. If you wish to use other contact information, change the information in these fields.
RECEIPT CONFIRMATION MESSAGE	If you wish to add a confirmation message that will be displayed on the registration owner's receipt, enter it in the field.
CANCELLATION POLICY	If your organization has a cancellation policy, enter it in the field. **NOTE**: If your organization uses Doubleknot's merchant services, leave this field blank. By default, Doubleknot's cancellation policy will always be displayed instead

Send Registration Notifications to Staff

If staff in your organization should receive email notification of all registrations, follow these steps:

1. Click the checkbox next to **Send a copy of registrant's confirmation receipt to the following e-mail addresses.**
2. In the field below, enter the email addresses of the staff who should receive copies of the confirmation messages. If you're entering more than one email address, separate the addresses with commas.

Allow Changes to Completed Registrations

You can allow or disallow registration owners to make changes to completed registration information. If you allow registration owners to change information, you must set the last date on which information can be changed.

NOTE: If you've disabled certain group signup options and plan to re-enable them closer to the program date, you **must** allow registration changes so that registration owners can return to name individual registrants, and sign up registrants for activities or classes, or select facilities.

To allow changes to registration information, follow these steps in the MODIFY REGISTRANTS section:

1. Click the **Allow Registration Changes** checkbox.
2. In the UPDATED CHANGES ALLOWED UNTIL field, enter or select the last date on which changes will be allowed.

Require Registration Owners to Log On

To set whether registration owners are asked to log on or not, follow this step:

1. In the LOG ON (SIGN ON) Prompt section, select the desired option from the pop-up menu:

   - **None**—Registration owners are never asked to log in.
   - **Optional Prompt for Log On or Create Profile**—Registration owners are asked to log in, but are not required to do so. Registration owners who don't already have a Doubleknot profile in for your organization have the option to create a new log on and profile.
   - **Require Log On or Create Profile**—All registration owners must log on. Registration owners who don't already have a Doubleknot profile for your organization are required to create a new log on and profile.

Allow Registration Owners to Create New Groups

If your program is configured for Group Signup, registration owners must identify their group at the beginning of the registration process. You can choose whether the registration owner can create a new group or whether they must select from a list of existing groups defined in Constituent Management. To set options for collecting group information, follow this step:

1. In the COLLECT GROUP INFORMATION section, select the desired option from the pop-up menu:

   - **Yes—Allow Person Registering to Create New Groups**. Registration owners may create a new group if the group they belong to is not displayed.

- **Yes—Person Registering Can Only Select From Pre-Existing Groups**. Registration owners may not create new groups—they may only select from the list of groups that are already defined for the organization.

Asking Registration Owners to Sign Up For E-Lists

In Event Settings, Doubleknot can be configured to always prompt registration owners to sign up for E-lists after they complete the registration process, or to allow event administrators to decide if the E-list prompt is displayed for each event. If Doubleknot is configured to allow administrators to decide whether the E-list prompt is displayed, use this procedure to include or exclude the E-list prompt.

NOTE: If Event Settings are configured so that the prompt is always displayed, the prompt will always be displayed, even if you select **No**.

To choose whether the option to sign up for e-lists, such as newsletters, is displayed, follow this step:

1. In the PROMPT TO SIGNUP FOR ELISTS menu, choose one of the following:

   - **Yes**—the prompt will be displayed.
   - **No**—the prompt will not be displayed.

Skip the Registration Details Page

After a registration owner clicks on the name of a session in the calendar, the registration details page is displayed with detailed information about the event and a button to click to begin the registration process. Doubleknot generally recommends that you use the registration details page to ensure that viewers can access all the information about the session such as the description, the date, contact information, costs, prerequisites, and other information.

However, in some circumstances, you may wish to skip the registration details page at the beginning of the registration. For example, if you've created a detailed web page about the program session elsewhere, you can place a link to the event on that page and skip the registration details so that registration owners begin the registration process immediately.

NOTE: If you select **Yes** for SKIP REGISTRATION DETAILS, information in the DETAILS field will not be displayed at the beginning of the registration process. However, the details can be displayed when someone clicks the name or the VIEW DETAILS link for the session on the page of information about the program. Information about entering details is located in Entering Details About the Session.

To display or skip the registration details page, follow these steps:

1. To skip the registration details page, select **Yes** from the SKIP REGISTRATION DETAILS pop-up menu.
2. To show the registration details, select **No** from the pop-up menu.

Set Ticket and Admission Options

Doubleknot creates admission tickets that can be scanned with handheld scanners, iOS devices including iPhones and iPads, or a web camera connected to a Windows computer. You can set a variety of ticketing and admissions for a session, including:

- Whether tickets are issued
- For registrations with multiple registrants, whether a ticket is issued for each individual registrant or for the entire group
- For events where individual tickets are printed, whether attendees can use the ticket to check in and out of the event (in/out privileges)
- Whether a link to the ticket is printed on the confirmation receipt
- When registrants can begin checking in
- Whether a reminder about the event will be sent to the registration owner

To set ticketing and admission options, follow these steps:

1. In the first pop-up menu in the TICKETING AND EVENT ADMISSION section, select one of the following options:

   - **None**—No ticket will be issued. The other will be disabled because no tickets are issued.
   - **Issue a Ticket for the Whole Group**—A single ticket will be issued for the entire group. When the ticket is presented at check-in, all registrants on the registration will be checked in whether they are present or not.

- **Issue a Ticket for Each Individual**—A ticket will be issued for each registrant. At the event, each individual must check in separately. Scanning the ticket again after check-in will indicate the ticket has already been used to check someone in.
- **Issue a Ticket for Each Individual (In/Out Privileges)**—A ticket will be issued for each registrant. At the event, each individual must check in separately. Registrants can use the same ticket to check out and check back in to the event.

2. By default, a link to each ticket is printed on the receipt. If you do not want a link to each ticket printed on the receipt, select **Do not print link to ticket on receipt**.
3. By default, registrants can check in at any time. If you wish to choose when registrants may check in, in the **Allow Check In** pop-up menu, select the number of hours before the event that registrant check-in should begin.
4. By default, no event reminder is sent to the registration owner. If you want to send an event reminder to the registration owner, in the last pop-up menu select the number of hours before the event that you want the reminder to be sent.

Set Payment Options

For any session, you can set what types of payment are accepted; whether a convenience fee is charged for online registration; and the financial account into which payments will be deposited.

These options are set in the PAYMENT DETAILS section at the bottom of the CREATE AND MODIFY A CALENDAR ACTIVITY page for the session.

Choosing What Types of Payment Are Accepted

To choose which payment types are accepted, follow this step:

1. In the PAYMENT TYPE section, select one of the following:

- **None**. There are no fees for the session, or you will not accept payment in advance. For example, if you plan to collect admission at the door, set the price in the COST IS PER and REGISTRANT COST ($) section, and select **None** here. The cost will be displayed to the registration owner but they will not be asked to pay before the event. (If you plan to collect admission at the event, you can add a reminder to registration owners in the RECEIPT CONFIRMATION MESSAGE section.)
- **Pay Online Only**. Only online payment is accepted for this session.
- **Pay By Mail Only**. Only payment by postal mail is accepted for this session. Your organization's mailing address will be displayed on the confirmation receipt with instructions to remit payment.
- **Pay Online or By Mail**. Both online and postal mail payments are accepted, and the registration owner may choose which kind of payment to make.

Set a Convenience Fee

Doubleknot supports the addition of a convenience fee for online payments. A convenience fee can be a flat amount; a percentage of the total amount; or a combination of both a flat amount and a percentage.

***Best Practice*:** We strongly recommend that you include all fees in the overall registration cost instead of showing customers a separate convenience fee.

To charge a convenience fee for online payments, follow these steps:

1. In the CONVENIENCE FEE section, click the **Payees pay convenience fee** checkbox. Additional convenience fee information will be displayed.
2. In the AMOUNT TO ADD section, enter one or both of the following:

- If you want to add a flat amount, enter the amount in the AMOUNT TO ADD field.
- If you want to add a percentage of the total cost, enter the percentage in the PERCENTAGE TO ADD field.

Choose the Account Where Payments are Deposited

If you are accepting online payments, you must choose an account where the payments will be deposited. To choose the account, follow this step:

1. Click the DEPOSIT PAYMENTS INTO pop-up menu. A list of accounts associated with your organization will be displayed.
2. Select the desired account.

Additional Settings for Program Sessions

This section contains information about setting additional options for program sessions. These options are only available after you create and save a session in which you specified a REGISTRATION BEGIN date.

NOTE: These settings are essentially identical to the settings for a Calendar Activity event.

Display the Manage a Program Session Page

The settings in this section are configured from the MANAGE A PROGRAM SESSION page. To display the MANAGE A PROGRAM SESSION page, follow this step:

1. In EVENT MANAGEMENT, click the **Programs** tab.
2. From the ORGANIZATION menu, select the organization in which the program was created.
3. Locate the program whose session you wish to edit, and click **Details**. The MANAGE A PROGRAM page will be displayed. The sessions for the program will be listed at the bottom of the page.
4. Click the name of the session you wish to work with. The MANAGE A PROGRAM SESSION page will be displayed. Additional configuration options for the session are located at the left side of the page.

Manage a Program Session page

Set Registrant Ratios

If you set up an event to support different types of registrants, you can choose how many registrants of one type are required for each registrant of another type. For example, for a scouting event, you might require that one leader be registered for every ten troop members.

If your event does not require complicated ratios but simply requires that each registration contain a certain number of registrants of a given type, use the MAX PER REGISTRATION and MIN PER REGISTRATION options on the main CREATE AND MODIFY page instead of using registrant ratios. For example, to require that each registration for Grandparents Day contain at least one child and one grandparent, enter 1 in the MIN PER REGISTRATION fields.

The REGISTRANT RATIOS option is only available if your event is set up for more than one type of registrant.

Registrant ratios are set in the following format:

```
Require ___ registrants of (type) for every ___ registrants of (type).
```

For example, to require one leader for every six scouts, set up the ratio as in the following:

Example: Setting a ratio of one leader for every six scouts

To set registrant ratios for a session, follow these steps:

1. Decide how many registrant of one type are required for how many registrants of another type.
2. At the MANAGE EVENT, click **Registrant Ratios**. The MANAGE REGISTRANT RATIOS page will be displayed.
3. In the REQUIRE __ REGISTRANTS field, enter the number of registrants that are the first part of the ratio.
4. In the first REGISTRANT(S) OF TYPE window, select the type of registrant for the first part of the ratio.
5. In the FOR EVERY __ REGISTRANT(S) field, enter the number of registrants that are the second part of the ratio.
6. In the second REGISTRANT(S) OF TYPE window, select the type of registrant for the second part of the ratio.
7. To save the registrant ratio you just created, click **Save**.
8. To add another registrant ratio, click ***New*** at the top of the MANAGE REGISTRANT RATIO section, and follow steps 1-7.
9. When you're finished adding registrant ratios, click **Done** to return to the Manage a Program Session page.

NOTE: Registrant ratio information is not copied when you create additional program sessions. You must configure registrant ratios in the MANAGE A PROGRAM SESSION page for each session.

Collect Additional Information with Registrant Attributes

The REGISTRANT ATTRIBUTES feature lets you request information about each registrant for an event without requiring you to set up custom forms. Information that you enter using these procedures takes precedence over any settings you chose when you create the event.

If your session has different registrant types, you can set different attributes to request for each type of registrant. If your session has a single registrant cost, the attributes you specify will be requested for all registrants.

Collecting information using registrant attributes is superior to creating custom form items for the following reasons:

- **Registrant attribute fields will automatically be displayed on the Add Participants page for each registrant**. You don't need to create, assign, and configure a form.
- **Data entered in registrant attribute fields are saved with the person's profile**. If you use registrant attributes to collect additional information like birth date or marital status, or if you create a new registrant attribute to collect allergy information, that data will always be available and associated with the person. This makes future registration easier because the data will automatically be filled in when the person is selected as a registrant, and provides useful information for constituent management.
- **Data entered in registrant attributes is easy to include in reports**. When you use a custom form to collect data, you need to enter a special label to identify the data. When you use a registrant attribute, the data will be included in any report that includes registrant data.

NOTE: Registrant attribute settings are not copied when you create additional program sessions. You must configure registrant attributes in the Manage a Program Session page for each session.

Where Does the Registrant Attribute List Come From?

When your organization began using Doubleknot, your implementation team chose the kind of constituent information that they want to be able to collect. The registrant attributes that are available in Event Management are created in the CONSTITUENT PROFILE ATTRIBUTES utility in Constituent Management. If you need additional registrant attributes, contact the staff member in charge of configuring constituent management information.

For Programs with a Single Cost per Registrant

1. At the MANAGE A PROGRAM SESSION page, click **Registrant Attributes**. The REGISTRANT ATTRIBUTES page will be displayed.
2. For each field that you wish to display during registration, follow these steps:

   - Click the checkbox beneath the SHOW heading.
   - To require this field to be completed for each registrant, click the checkbox beneath the REQUIRE heading. If you do not select this option, registration owners can complete registration without entering this information.

3. When you are finished setting registrant attributes, click **Save** to save your changes.
4. Click **Done** to return to the MANAGE A PROGRAM SESSION page.
5. Repeat steps 1-4 for each session.

For Programs with Different Registrant Types

1. At the MANAGE A SESSION page, click **Registrant Attributes**. The REGISTRANT ATTRIBUTES FOR <EVENT TITLE> page will be displayed, with each registrant type displayed in the Registrant Type window.
2. In the REGISTRANT TYPE window, choose the registrant type for which you want to set registrant attributes:

   - To set an attribute for all types of registrants, click **All**.
   - To set an attribute for a specific registrant type, click the registrant type.
   - To select a range of registrant types that are next to each other, hold down the Shift key and drag to select more than one.
   - To select more than one registrant type at a time, hold down the Ctrl key and click the registrant types.

3. For each field that you wish to display for your selection during registration, follow these steps:

   - Next to the Field name, click the checkbox beneath the Show heading.
   - To require this field to be completed for each registrant, click the **Required** checkbox. If you do not select this option, registration owners can complete registration without entering this information.
   - Click **Save** to save your changes.

4. If you want to apply attributes to a different registrant type, repeat steps 2-4 for the next registrant type.
5. When you are finished setting attributes, click **Save** to save the changes you made.
6. Click **Done** to return to the MANAGE A PROGRAM SESSION page.
7. Repeat steps 1-6 for each session.

Gather Information and Setting Optional Costs with Registration Forms

The Registration Forms feature lets you create forms that request unique information during online registration. For example, you might want to know each registrant's T-shirt size, or require each registrant to select a meal option, or allow registrants to rent equipment. Or, you might want to create a form that gathers additional information about each group that's registering for the program session.

You can associate additional costs with any item on a form. If the registration owner selects an item with an additional cost, the cost will be added to the final registration total. For example, if there are different fees for different kinds of equipment rentals, the correct cost will be added to the total cost.

The information that registration owners enter in forms will be displayed on their online and emailed confirmation receipts.

This procedure contains information about assigning existing forms to program sessions.

Best Practices for Program Registration Forms

The following are best practices for program registration forms that will help ensure a seamless experience for registration owners at your site:

- Before you start building forms, decide what kind of information you need to collect and whether it should be located on a per-registrant form or on a group form. For example, personal information about each registrant should be located on a per-registrant form, but information that applies to the group, such as orders for optional merchandise, should be on the group form.
- To make the registration process less cumbersome, use as few forms as possible and ask as few questions as possible.
- Don't ask for any information in forms that you can collect using registrant attributes. For example, registrant first name, last name, email address, birthday, and other information can be easily collected using registrant attributes and should not be included on a form.
- Make sure that you aren't requesting duplicate information. For example, if you're using a form for each named registrant, the registration owner will already have entered each participant's name, and the forms will be associated with the correct registrants, so you don't need to ask for the registrant's name again in the form.
- Always test the program registration thoroughly to make sure that the forms function correctly before taking the sessions out of Test Mode. For more information about testing, see Testing a Program.

Assigning a Form to a Session

NOTE: Assigned forms are not copied when you create additional program sessions. You must assign forms in the MANAGE A PROGRAM SESSION page for each session.

To assign a form to a session, follow these steps:

1. At the MANAGE EVENTS page for your event, click **Assigned Forms**. The ASSIGN FORMS page will be displayed.
2. In the FORM: pop-up menu, select the form you wish to attach to the event.
3. Click **Assign**. Information about the form will be displayed at the bottom of the page.
4. For each assigned form, the following options are available:

    - If the form must be completed, click the **Required** checkbox. The registration process can not be completed until the form is filled out.
    - If the form should be completed for each registrant, select **Each Registrant** checkbox. The form will be displayed on the page where registration owners name individual participants.
    - If the form should be completed for the group, make sure that **Each Registrant** is <u>not</u> selected. During registration, a Quick Links button for Group Forms will be displayed.

5. To assign additional forms, repeat steps 2-4.
6. When you are finished assigning forms, click **Done** at the bottom of the page. The forms will be assigned and the MANAGE A PROGRAM SESSION page will be displayed.
7. Repeat steps 1-7 for each session.

Removing a Form

To remove a form from a program session, follow this step on the Assign Forms page:

1. To the far right of the name of the form, click **Unassign**. The form will immediately be removed from the list.
2. Repeat step 1 for each session.

NOTE: Once there are registrations for a session, you can't remove an assigned form or delete items on the form. Be sure that your form captures the information you need and functions correctly before taking the session out of Test Mode.

Create and Assign Price Groups

Price groups provide greater control over how different pricing options are presented during the registration process. When registration costs are assigned to price groups, the registration owner is asked to select a price group before identifying registrants. The correct price for each registrant type will be displayed.

In programs, three different costs can be controlled by price groups:

- **The registration cost for the session**. The costs for each session are controlled by the PRICE GROUPS/SCHEDULES page for the session. Each session has its own PRICE GROUPS/SCHEDULES page.
- **The per-registrant cost for the session**. The costs for each session are controlled by the PRICE GROUPS/SCHEDULES page for the session. Each session has its own PRICE GROUPS/SCHEDULES page.
- **The per-registrant cost for session events**. If you set the cost for session events on the PRICE GROUPS/SCHEDULES page for a session, all session events in the session will have the same cost. If <u>different</u> session events have different costs, enter the costs in each individual session event and only assign registrant types to price groups on the PRICE GROUPS/SCHEDULES page for the session.

Important Warnings About Price Groups and Programs

To ensure that price groups are configured correctly for programs, follow these guidelines.

- **Keep Configuration as Simple as Possible**. Before you start setting up pricing for programs, make sure that your pricing scheme is as simple as possible. Try to reduce the number of places where costs are assigned and the number of registrant types and price groups that you use. For example, you may be able to skip charging a registration fee or per-registrant fee at the session and set all of the costs at session events instead. To make sure that the right prices are assigned when you configure and test the program configuration, write down the price groups, registrant types, and associated costs for sessions and session events.
- **If Session Events Have Different Per-Registrant Costs, Assign the Costs on the Create/Modify Page**. If you set a price for a session event item on the Price Groups/Schedules page, it will apply to all session events in the session. If all of your session events do not have the same per-registrant price, do not set the per-registrant price on the Price Groups schedule page. If the session events have different per-registrant prices, set the costs at each individual session event, and only assign registrant types to price groups on the Price Groups/Schedules page.

- **If You're Using Registrant Types, At Least One Registrant Type from Each Session and Session Event Must Be Assigned to Each Price Group**. Visitors will select their price group at the beginning of registration. The price group they select determines what registrant types are displayed for each session and for each session event. If a session or session event does not have at least one registrant type assigned to the selected price group, the registration owner will not be able to register because no registrant types will be displayed. To ensure that registration owners can register correctly if you're using price groups, at least one registrant type must be selected for each price group in sessions and session events.
- **Thoroughly Test Price Groups and Pricing Before Opening Registration to the Public**. If you're using price groups for a program, be sure to fully test the configuration before making it active. In addition to the standard testing guidelines, you must select each price group and ensure that every session and session event shows the correct registrant types and prices for that price group.

Setting Up Price Groups

To create new price groups, follow these steps:

1. In EVENT MANAGEMENT, click **Utilities**.
2. On the UTILITIES page, click **Manage Price Groups**. The MANAGE PRICE GROUPS page will be displayed, containing a list of any price groups that are already configured.
3. At the upper right, click **New Price Group**. The EDIT PRICE GROUPS page is displayed.
4. In the PRICE GROUP NAME field, enter the name of the new price group.
5. Click **Save**.
6. Click **Done**. You'll return to the MANAGE PRICE GROUPS page and the price group you created will be displayed in the list.
7. When you're finished creating price groups, click **Done**.

Example: Price groups are configured for Members and Nonmembers

To edit a price group, follow these steps at the MANAGE PRICE GROUPS page:

1. In the ACTION column, click **Edit**. The EDIT PRICE GROUPS page is displayed.
2. In the PRICE GROUP NAME field, edit the name of the price group.
3. Click **Save**.
4. Click **Done**. You'll return to the PRICE GROUPS page and the price group you created will be displayed in the list.

To delete a price group, follow these steps at the MANAGE PRICE GROUPS page:

1. In the ACTION column, click **Delete**. A dialog box confirming that you want to delete the price group will be displayed.
2. In the dialog box, click **OK**. The price group will be removed from the list.

Configuring a Session for Different Price Group Options

The following table explains how to configure a session on the CREATE AND MODIFY page for each session and on the PRICE GROUPS page. Detailed instructions for the PRICE GROUPS page are located in the next section.

To set this cost and assign price groups:	Follow these steps
Session: Per-registrant cost (single cost)	• For the session, choose **Single Cost**. • In Price GROUPS/SCHEDULES, in the GENERAL item, select the price groups for the session and assign the costs for each price group.
Session: Per-registrant cost (multiple cost)	• For the session, choose **Multiple Cost** and select registrant types. • In PRICE GROUPS/SCHEDULES, for each registrant type, select the price groups and assign per-registrant costs.
Session: Include a per-registration cost	• For the session, choose **Named Registrant and Per Registration** or **Unnamed Registrant and Per Registration**. • In PRICE GROUPS/SCHEDULES, in the REGISTRATION COST item, select price groups and set the registration costs for each price group.
Session Events: Per-registrant cost where session events have <u>different </u>prices for the same registrant type and price group (multiple cost).	• For each session event, choose **Multiple Cost**, select registrant types, and assign the costs for each registrant type on this page. • In PRICE GROUPS/SCHEDULES, for each registrant type for session events, assign the registrant type to price groups but do not set any costs. The costs from individual session events will be used instead.
Session Events: Per-registrant cost for where <u>all </u>session events have the <u>same </u>price within a price group (single cost) and <u>registrant types are not used</u>. For example, all Members pay $100 for session events and all Nonmembers pay $150 for session events.	• For each session event, choose **Single Cost**. • In PRICE GROUPS/SCHEDULES, in the GENERAL (SESSION EVENTS) item, select price groups and set the per-registrant cost for each price group. These costs are applied for every registrant in every session event depending on the price group that the registration owner selects.
Session Events: Per-registrant cost for session events where <u>all </u>session events have the <u>same </u>price for the same registrant type and price group (multiple cost).	• For each session event, choose Multiple Cost and select registrant types. • In Price Groups/Schedules, for each registrant type for session events, select price groups and set the per-registrant cost for each price group. These costs are applied for every registrant in every session event depending on the price group and registrant type that the registration owner selects.

Configure the Session to Use Price Groups

To configure a program session to use price groups, follow these steps:

1. On the MANAGE A SESSION page, click **Edit**. The CREATE AND MODIFY A SESSION page is displayed.
2. If you don't want to charge a registration cost for the session, select one of the following:

    • **Named Registrant**
    • **Unnamed Registrant**

3. If you want to charge a per-registration cost for the session, select one of the following:

    • **Named Registrant and Per Registration**
    • **Unnamed Registrant and Per Registration**

4. If you don't want to set different registrant types at the session level, follow these steps:

    • Select **Single Cost**.
    • Enter any other information for the session, except the per-registrant costs. These will be entered on the PRICE GROUPS/SCHEDULES page in the GENERAL item.

5. If you want to use registrant types at the session level, follow these steps:

- Select **Multiple Cost**.
- Select each registrant type that you want to use for the session. Assign the costs for each registrant type on the Price Groups/Schedules page.

6. At the bottom of the page, click **Save**.
7. Choose one of the following:

- If you want to use price groups for session events, go to the next section, Configure Session Events to Use Price Groups.
- If you only want to use price groups at the session level and not for session events, go to Assign Price Groups on the Price Groups/Schedules Page.

Configure Session Events to Use Price Groups

If you want to use price groups for session events, follow these steps

1. On the program page, click **Manage Session Events**. The Manage Session Events page is displayed.
2. For the session event you want to work with, click **Edit** in the Actions column. The page to edit the session event is displayed.
3. If you don't want to set different registrant types at the session event level, follow these steps:

- Select **Single Cost**.
- Do not set per-registrant costs on this page. Set the per-registrant costs for different price groups in the General (Session Events) item on the Price Groups/Schedules page.

4. If you want to use registrant types at the session event level, follow these steps:

- Select **Multiple Cost**.
- Select each registrant type that you want to use for the session event.
- If every session event in your program will have the same price for this registrant type, enter the costs on the Price Groups/Schedules page.
- If different session events have different costs for this registrant type, enter the costs for this session event on this page.

5. At the bottom of the page, click **Save**.
6. Follow the steps in Assigning Price Groups on the Price Groups/Schedules Page.

Assign Price Groups on the Price Groups/Schedules Page

To assign price groups for a program, follow these steps:

1. On the Manage a Session page, click **Price Groups/Schedules**. The Price Groups/Schedules page will be displayed.
2. If you selected a per-registration cost for the session, the Registration Cost item is displayed. To set the registration cost for the session, choose one of the following:

- If the registration cost is the same for all price groups, select **Same Price for All Price Groups** and enter the costs.
- If the registration cost is different depending the on the price group that registration owner selects, select the price groups you want to use for the program and enter the costs for each price group.

3. If you selected **Single Cost** for the session, the General item is displayed. This controls the price for each registrant for every session. To set the per-registrant cost of the session for different price groups, choose one of the following:

- If the registration cost is the same for all price groups, select **Same Price for All Price Groups** and enter the costs.
- If the per-registrant cost is different depending on the price group, select the price groups you want to use and enter the per-registrant costs for each price group.

4. If you selected **Multiple Cost** for the session, each registrant type you selected for the session is displayed. For each registrant type, follow these steps

- If the session cost for the registrant type is the same for all price groups, select **Same Price for All Price Group**s and enter the costs.

- If the session cost for the registrant type is different depending the on the price group that registration owner selects, select the price groups that should contain that registrant type and enter the costs for each price group.

5. If you selected **Single Cost** for one or more session events, the GENERAL (SESSION EVENTS) item is displayed.
    - If the per-registrant cost for session events is the same for all price groups, select **Same Price for All Price Group**s and enter the costs.
    - If the per-registrant cost for all session events is different depending the on the price group that registration owner selects, select the price groups you want to use and enter the per-registrant costs for each price group.

6. If you selected **Multiple Cost** for one or more session events, each registrant type you selected in session events is displayed with (Session Events) following the name.
    - •For each registrant type for session events, select the price group(s) that the registrant type belongs to.
    - •If all session events have the same per-registrant cost for this registrant type, enter the costs on this page.
    - •If different session events have different per-registrant costs for this registrant type, do not enter prices for the registrant type on this page. The prices set for each session event will be used instead. If you enter costs, the costs will override the different per-registrant prices set for different session events.

7. Click **Save**.

Setting Up and Assigning Payment Schedules

Payment schedules allow registration owners to pay for programs in installments. For example, if you are configuring a relatively expensive program like a conference or summer camp, you can allow registration owners to pay an initial deposit and set the date or dates by which following payments must be made.

Options for Payment Due Dates

The due dates for items on a payment schedule can be based on:
- **A fixed date**. If you're creating a payment schedule for an event, select this option.
- **The number of days from the date of registration or the activity**. If you're creating a payment schedule for a facility reservation, select this option. This ensures that visitors booking a reservation on the date of their choice will receive payment schedule options based on the date of their reservation.

Understanding Payment Items

You can configure the following types of payments in a payment schedule:
- A fixed deposit amount for the entire registration
- A fixed deposit amount for each registrant regardless of type
- A fixed deposit amount for specific type of registrant
- A deposit amount that is a percentage of the total registration
- The date by which the total outstanding balance must be paid
- An early discount for paying the full amount by a certain date

The following example configuration shows an event with the following payment schedule:
- $50 deposit is required at the time of registration.
- 50 percent of the balance is due 45 days before the session starts. If 50 percent of the balance is not paid by that date, a $15 late fee is applied.
- An early payment discount of ten percent is applied for paying in full at least 60 days before the session starts.
- The outstanding balance is due on 14 days before the session starts.

Example: Payment schedule configuration

Schedule Item	Payment Type	Description	Amount/ Percent	Late Fee/ Early Discount Type	Late Fee/ Early Discount Amount/ Percent	Late Fee/ Early Discount		Due Date		Action
				Payment Schedule Basis						
		Schedules are based on:	○ Fixed dates ◉ Days from the date of registration or activity							
		Program:	☑ Include Session Events							
1	Amount/Deposit Per Registration ▼	Deposit	50.00	Amount Per Registration ▼				☑ At Registration		
2	Percentage Of Total Registration ▼	Interim 50%	50.00%	Amount Per Registration ▼	20.00	Late Fee ▼	60	Day(s) Before Activity ▼	Delete
3	Pay In Full ▼	Early Pay Discount		Amount Per Registration ▼	0.10	Early Discount ▼	45	Day(s) Before Activity ▼	Delete
4	Balance Due ▼	Final Balance Due		Amount Per Registration ▼		None ▼	30	Day(s) Before Activity ▼	Delete

Save   Cancel   Add Schedule Item 5

> **NOTE**: The final item in any payment schedule must be **Balance Due**.

Create a Payment Schedule
The following procedure contains the basic steps to begin creating a payment schedule.

1. Display the page for the event.
2. In the list at the left, click **Payment Schedules**. The PAYMENT SCHEDULE FOR <EVENT NAME> page will be displayed.
3. In the SCHEDULES ARE BASED ON section, select one of the following:

   - If you're creating a payment schedule for an event or program, select **Fixed Dates**.
   - If you're creating a payment schedule for a facility reservation, select **Days from the date of registration or activity**.

4. If you want to include the costs of session events in the payment schedule, select **Include Session Events**.

Add Items to the Payment Schedule
To add items to the payment schedule, follow these steps:

1. At the bottom of the page, click **Add Schedule Item**. A row of fields to enter information about the schedule item will be displayed.
2. Choose **one** of the following from the PAYMENT TYPE pop-up menu:

To Set This:	Select this
Deposit amount for the entire registration	**Amount/Deposit Per Registration**
Deposit amount for each registrant (regardless of registrant type)	**Amount/Deposit per Registrant**
Deposit amount for a specific registrant type (if registrant types are configured for the event)	**Amount/Deposit Per <Registrant Type>**
When a specified percentage of the total registration fee is due	**Percentage of Total Registration**
When the registration owner's remaining balance is due. The Balance Due item is required and must be the last item in the list	**Balance Due**

3. In the DESCRIPTION field, enter a unique description for the schedule item.
4. In the AMOUNT/PERCENT field, one of the following:

   - If you selected an AMOUNT/DEPOSIT item, enter the amount in dollars and cents (for example, for a $20.25 deposit, enter 20.25).
   - If you selected PERCENTAGE OF TOTAL REGISTRATION, enter the percentage (for example, 50%).

5. Choose one of the following:

   - If you want to add a late fee or early discount to this item, go to step 6.
   - If you don't want to add a late fee or early discount to this item, go to the next section.

6. To add a late fee or early discount, follow these steps at the LATE FEE/EARLY DISCOUNT TYPE menu:

To set a fee or discount that is:	Select this
A flat amount applied to the total registration	**Amount Per Registration**
A flat amount for every registrant regardless of registrant type	**Amount Per Registrant**
A flat amount applied only to the selected registrant type	**Amount Per <Registrant Type>**.
percentage of the total payment due	**Percentage of This Payment Due**
percentage of the total registration cos	**Percentage of Total Registration**

7. In THE LATE FEE/EARLY DISCOUNT AMOUNT/PERCENT field, enter the following:
   - If the fee or discount is a flat amount, enter the amount in dollars and cents.
   - If the fee or discount is a percentage, enter the percentage as a percentage (for example, 50 percent is entered as **50%**).

8. In the LATE FEE/EARLY DISCOUNT pop-up menu:
   - If you're configuring a late fee, select **Late Fee**.
   - If you're configuring an early discount, select **Early Discount**.

9. In the DUE DATE field, select or enter the date on which the late fee will first be applied or the last day on which the early discount is available.

   NOTE: For late fees, the fee will be applied to registrations received after 11:59:59 on the Due Date. For early registration discounts, the discount will be applied to registrations received before 11:59:59 on the Due Date.

Configure the Last Item (Balance Due)
To configure the last item on a payment schedule, follow these steps:

1. After entering all the schedule items, create a final schedule item for **Balance Due**, which informs the registration owner of the date on which the remaining amount must be paid. **The final item in a payment schedule must always be Balance Due item.**
2. Click **Save**. The payment schedule will be saved and the event page will display information about the payment schedule at the bottom of the panel.

Payment schedule information is displayed on the session's event's management page

Creating Session Event Groups and Session Events

This section contains information and instructions for session event groups and session events. The following topics are covered:

- About Session Events and Session Event Groups
- Understanding Classes
- About Session Event Waitlists
- Icons Used in this Section
- Getting Started
- Creating Session Event Groups
- Creating a Session Event
- Saving a Session Event
- Creating a Class
- Copying a Session Event
- Deleting a Session Event

About Session Events and Session Event Groups

Session events are activities and classes within a session that registrants sign up for. Session event groups are categories that contain groups of related session events, such as those starting at a certain time, or that are appropriate for a specific age group, or that are about the same topic. For example:

- If you are setting up a program like a daycamp where registrants will choose one educational track that they will stick with during the entire week, create one session event group that contains a session event for each individual track.
- If you are setting up a camp where registrants can choose from a range of different activities, create session event groups for each type of activity.
- If you are setting up an educational conference in which registrants will choose from a selection of workshop or courses in different time slots, set up a session event group for each time slot.

About Session Event Waitlists

You can set waitlists for session events in the same way that you set waitlists for Calendar Activity events and program sessions. For most kinds of programs, the best practice is to set waitlists at the session event level instead of at the session. For example:

- For a weeklong summer daycamp with individual signup where the session events are the tracks that the child signs up for, the waitlist should be set for each session event instead of at the session.
- For a program with group signup where everyone in a troop wants to attend an activity like a merit badge class together, the waitlist should be set for each session event, not at the session.

Waitlists for session events are set in the ONLINE REGISTRATION DETAILS section. Instructions are located in Setting Single Registrant Costs and Options and Setting Multiple Costs for Registrants and Registration.

Icons Used in this Section

The following icons are used in this section. Procedures will refer to the icon by name.

Name	Icon	Action
Add New		Create a new item
Edit		Edit the selected item
Copy		Make a copy of the selected item
Delete		Delete the selected item

Getting Started

To get started with session events, follow these steps:

1. At the MANAGE A PROGRAM page, click **Manage Session Events**. The MANAGE SESSION EVENTS page will be displayed.

Creating Session Event Groups

Follow these steps for each session event group you wish to create:

1. At the left side of the screen, click **New Session Event Group**. The MANAGE PROGRAMS page will be displayed.
2. In the SESSION EVENT GROUP field, enter the name of the sub-activity group.
3. In the ACTIVE menu, choose one of the following:

   - If you have complete information about the sub-activities in the group and want them to be visible to registration owners as soon as the session is taken out of Test Mode, select **Active**.
   - If you do not want the sub-activities in this group to be visible during registration, select **Not Active**.

   NOTE: If you select **Not Active**, you must remember to make the session event group active at a later date. And, make sure that the sessions are configured to allow registration owners to update information so that they can return to sign up registrants for session events.

4. Click **Save**. The MANAGE SESSION EVENTS page will be displayed and the session event group you created will be listed in the column at the left.

Creating the Educational Tracks session event group

Creating a Session Event

The configuration options for session events are a subset of the configuration options for Calendar Activity events and program sessions. To create a session event that is not a class, follow these steps at the Manage Session Events page.

1. In the SESSION EVENT GROUP column at the left, click the **Add** icon for the session event group in which you want to create the activity. The CREATE AND MODIFY A SESSION EVENT page will be displayed.

Entering general information for a session event

Entering Description, Dates, and Times

Activity dates and times for session events are important to ensure that registrants know when their activity is taking place. The following examples can help you understand session event dates for different kinds of programs.

- If you're setting up a program like a daycamp with week-long sessions where registrants sign up for a single educational track that they'll stay with all week, the Activity Date for the session event will be the first day of the session and the End date will be the last the day of the session.
- If you're creating a program where registrants will sign up for multiple session events, such as a professional conference or a camp where kids can choose their activities, the Activity Dates and Activity Time for each session event will be the date and that each instance of the event is available. For example, if "Mountain Hike" is available every day of a five-day session from 9 AM to 11 AM, you'll create five "Mountain Hike" session events. Each will have a different Activity Date, and all of them will have an Activity Time of 9:00 AM to 11:00 AM.

To enter the name, beginning and ending dates, and times for the session event, follow these steps:

1. In the DESCRIPTION field, enter the name of the session event to be displayed on the calendar.
2. In the ACTIVITY DATE field, select the date that the session event begins.
3. In the END DATE field, select the date that the session event ends.
4. In the ACTIVITY TIME section, select the beginning and end times. Because the Activity Time is used to identify scheduling conflicts, be sure to enter this information for each session event.

Set Additional Times and Dates (Frequency)

If a session event meets more than once, you can set the date and start time for every additional "instance" of the same session event. For example, consider a program that offers a session event that meets twice. The first meeting is at 6 PM

on Monday night, and the second meeting is at 6 PM on Wednesday night. When you create the session event, you can schedule the Wednesday night meeting—the second instance—using the CUSTOM option in the FREQUENCY pop-up menu.

To set additional times and dates for the session event, follow these steps:

1. In the SESSION EVENT START DATE and ACTIVITY TIME sections, enter information for the first occurrence of the session event.
2. In the FREQUENCY menu, select **Custom**. The ADD NEW INSTANCE button will be displayed.
3. Click **Add New Instance**. Date and time fields for the new instance of the session event will be displayed.
4. Enter the start date/time and end date/time for this instance.
5. If necessary, repeat steps 2-4 for every additional instance of the session event.

Creating a session event with a custom Frequency setting

All session event dates are displayed during activity registration

Enter Activity Details

You can enter detailed information about the activity that includes formatted text, graphics, embedded video, and links to pages on your Web site. This information is displayed

In the DETAILS window, use the Doubleknot Rich Text Editor to enter and format the detailed information about the session event.

Enter Online Registration Information for the Session Event

To set the dates when online registration for the session event begins and ends, follow these steps:

1. In the REGISTRATION BEGIN DATE/TIME field, enter or select the date when online registration should begin for this session event.
2. Use the pop-up menus to the right of the field to select the time that online registration will begin on that date.
3. In the REGISTRATION END DATE/TIME field, enter or select the date when online registration should end.
4. Use the pop-up menus to the right of the field to select the time that online registration will end on that date.

NOTE: These registration dates apply only to the session event. If you are not allowing registration owners to sign up participants for the session event when session registration opens, be sure that you allow registration changes with the MODIFY REGISTRANTS setting for both the session *and* the session event so that registration owners can return to their registration.

Set Cost Options

You can assign costs to individual session events. When someone signs up for a session event that has an additional cost, the cost will be included in the final registration cost for the session.

For each of these options, you can assign a single cost for each attendee and/or registration, or assign multiple costs for different types of attendees. For example, you can set up a session event to charge different fees for member and nonmembers.

When you're setting up registration and registrant costs, you can also set these additional registration options:

- The minimum number of registrants for each registration
- The maximum number of registrants for each registration
- Whether a waitlist is available
- Early registration discounts
- Late registration fees

Setting Single Registrant Costs and Options

If your session event has different costs depending on the kind of registrant, follow the steps in Setting Multiple Costs for Registrants and Registration.

If you want to charge a single cost for each registrant, follow these steps:

1. If your program is configured for group signup, choose one of the following in the COST IS PER section:

   - If you want registration owners to assign participants by name to the activity, select **Named Registrant**.
   - If you only want to know the number of participants from the group who will be attending the activity, select **Unnamed Registrant**.

   NOTE: If your program is configured for individual signup, the only option is **Named Registrant**, which will be selected by default.

2. In the REGISTRANT COST (US$) section, select **Single Cost.**
3. In the REGISTRANT COST (US$) field, enter the cost for each registrant.
4. In the MIN REGISTRANTS PER REGISTRATION field, enter the minimum number of registrants for this session event allowed for each registration. If you leave this field blank, the minimum number of registrants will be one.
5. In the MAX REGISTRANTS PER REGISTRATION field, enter the maximum number of registrants for this session event allowed per registration. If you leave this field blank, there are no limits on the number of registrants for this session event.
6. In the MAXIMUM ATTENDEES field, enter the overall maximum number of registrants for the session event.

   NOTE: The number you enter here is important, as it controls the total number of registrants for the session event.

7. If you want to set up a waitlist for the event, enter the desired size of the waitlist in the WAIT LIST SIZE field. (This option is only available if the session event is configured for named registrants.)
8. To set an early registration discount, follow these steps:

   - In the EARLY DISCOUNT APPLIED BEFORE field, enter or select the date on which the early registration discount will end.
   - In the EARLY DISCOUNT AMOUNT field, enter the amount (in dollars) of the early registration discount.

9. To set a fee for late registration, follow these steps:

   - In the LATE FEE APPLIED AFTER field, enter or select the date on which the late fee will begin.
   - In the LATE FEE AMOUNT field, enter the amount (in dollars) of the late fee.

10. Follow the steps in to enter the rest of the information for the activity.

Setting Multiple Costs for Registrants and Registration

Doubleknot lets you create session events with different costs for different types of registrants. For example, your organization might want to charge different prices for this session event for members or nonmembers of your organization, or for youth and adults. If you set up multiple costs depending on the type of registrant, you can configure

the minimum and maximum number of that type of registrant per registration; the maximum number of that type of for at the session; and different late fees and early discounts for each type of registrant.

If you want to charge a different cost for different types of registrant, follow these steps:

1. If your program is configured for group signup, choose one of the following in the COST IS PER section:

   - If you want registration owners to assign participants by name to the session event, select **Named Registrant**.
   - If you only want to know the number of participants from the group who will be attending the session event, select **Unnamed Registrant**.

   NOTE: If your program is configured for individual signup, the only item in the COST IS PER section is **Named Registrant**, which is selected by default.

2. In the REGISTRANT COST section, select **Multiple Cost**. The page will redisplay with new options for assigning costs to different types of registrants.

3. To set up each type of registrant, follow these steps:

   - In the AMOUNT field, enter the cost for that type of registrant.
   - In the REGISTRANT TYPE section, select the type of registrant.

4. To set a minimum number of this registrant type for each registration, enter the number in the MIN PER REGISTRATION field.

5. To set a maximum number of this registrant type for each registration, enter the number in the MAX PER REGISTRATION field.

6. To limit the number of this type of registrant who can attend the session event, enter the number in the MAX ATTENDEES field.

7. If you want to set a waitlist for this type of registrant, enter the size of the waitlist in the WAIT LIST field. (Waitlists are only available if you selected **Named Registrant**.)

8. If you want to apply an early registration discount for this type of registrant, follow these steps:

   - In the EARLY DISCOUNT DATE field, enter or select the last date for the early registration discount. The early discount will be applied to registrations completed before 11:59:59 PM on that date.
   - In the EARLY DISCOUNT AMOUNT field, enter the amount in dollars of the early registration discount.

9. If you want to apply a late registration fee for this type of registrant, follow these steps:

   - In the LATE FEE DATE field, enter or select the first date on which the late fee will apply. The late fee will be applied to registrations completed before 11:59:59 PM on that date.
   - In the LATE FEE AMOUNT field, enter the amount of the late fee in dollars.

10. Repeat steps 1-9 for each registrant type. If you need more rows, click the **Add More** button.

11. In the TOTAL REGISTRANTS PER REGISTRATION field, enter the total number of registrants that are allowed on a single registration.

12. In the MAXIMUM ATTENDEES field, enter the overall maximum number of registrants for the activity.

    NOTE: The number you enter here is important, as it controls the total number of registrants for the activity.

Set Additional Session Event Registration Options

To set additional registration options for the session event, follow these steps:

1. If you want to set an age requirement for registrants, follow these steps:

   - In the MIN AGE (MONTHS) field, enter the minimum age for the event in months. For example, to set the minimum age as five years old, enter **60**.
   - In the MAX AGE (MONTHS) field, enter the maximum age for the event in months. For example, to set the maximum age as eight years old, enter **96**.

2. In the ALLOW REGISTRATIONS FROM section, choose one of the following:

   - To limit registrations to people with login profiles, select **Only Members Who Have Signed In**.
   - To allow anyone to register, select **Anyone**.

3. To allow registration owners to make changes to their registrations, follow these steps:

- In the MODIFY REGISTRANTS section, select **Allow Registration Changes**.
- In the UPDATED CHANGES ALLOWED UNTIL field, enter or select the last date that the registration can be modified.

Saving a Session Event

To save the information you entered for a session event, follow this step:

1. At the bottom of the page, click **Save**. The session event will be saved, and the MANAGE SESSION EVENTS page will be displayed with the new session event in the column at the right.

Adding an Instructor

You can add instructors to session events. Instructors can view and print rosters and mark attendees as present. For scout programs, instructors can sign off on badge requirements.

NOTE: To be available as an instructor, a user's Doubleknot account must be assigned Curriculum Level 2 permissions.

To assign an instructor to a session event, follow these steps on the MANAGE SESSION EVENTS page:

1. At the right of the session event name, click the **Add Instructor** icon.

   - If the session event occurs more than once in the program, choose whether you want to add the instructor to all occurrences of the session event, or only to the selected one. Then, click OK. The CLASS INSTRUCTOR ASSIGNMENT
   - If the session event only occurs once, the CLASS INSTRUCTOR ASSIGNMENT page will be displayed.

2. In the AVAILABLE column, click the letter of the last name of the instructor you wish to assign.
3. Locate and select the instructor.
4. Click **Add>>**. The instructor will be added to the SELECTED column.
5. If more than one instructor should be assigned, repeat steps 3-5 for each additional instructor.
6. When you're finished adding instructors, click **Done**. The MANAGE SESSION EVENTS page will be displayed.

Copying a Session Event

To copy a session event, follow these steps:

1. In the ACTIONS column, click the **Copy** icon. A confirmation dialog box will be displayed.
2. In the NEW DESCRIPTION field, enter a name for the copied activity.
3. Click **Copy**. The new session event will be created with the same attributes as the original.
4. Click the **Edit** icon to modify information if needed.

Deleting a Session Event

To delete a session event, follow these steps:

1. In the ACTIONS column, click the **Delete** icon. A conformation dialog box will be displayed.
2. Click **Delete**. The session event will be deleted.

Creating Additional Sessions

If your program will have more than one session, use the procedures in this section to create additional sessions.

About Additional Sessions

After you create the first session, the information on the Create and Modify page for the first session is copied into any additional sessions that you create. When you edit an existing session, you can choose to edit only the session that you selected or to apply the changes to all of the sessions.

Creating Additional Sessions

To create each additional session for the program, follow these steps:

1. At the MANAGE A PROGRAM page, click **New Session**. The CREATE AND MODIFY page for a session will be displayed, containing the same information as the first session.
2. In the DESCRIPTION field, enter the name of the new session.
3. Change any other items on the page as needed. Items that require updating may include:

   - Activity dates
   - Registration details
   - Registration beginning and ending dates
   - Registrant costs (for example, if you're configuring a weekly summer daycamp that is closed on July 4, the registration fee might be lower than for other sessions)
   - The last date on which a registration can be modified

4. At the bottom of the page, click **Save**. The MANAGE A PROGRAM page will be displayed, and the new session will be added to the list.

Modifying Additional Program Session Settings

Follow the instructions in [Additional Program Session Settings](#) to assign registrant ratios, registrant attributes, forms, price groups, and/or payment schedules to each additional session.

Adjusting Online Registration Dates for Session Events

If you make a change to the online registration dates and times for a session, you can automatically adjust the online registration dates and times of the associated session events to have the same dates. The following dates can be automatically adjusted:

- Registration Begin Date/Time
- Registration End Date/Time
- Modify Registrants Until Date

To change the online registration dates of session events to match the changes in the online registration dates for the overall session, follow these steps:

1. At the MANAGE A PROGRAM page, click **Adjust Session Event Dates**. A confirmation dialog box will be displayed.
2. Click **Adjust**. The online registration dates of all session events will be adjusted to match the online registration dates of the sessions in which they occur.

Synchronizing Session and Session Event Registration Dates

When you're setting up a program with multiple session events in every session, Doubleknot's registration date synchronization features can help you ensure that all of the registration dates are set correctly. You can set the registration dates and times for all session events in a single session or for all session events in the entire program.

The following options are available for syncing registration dates:

- **Sync session event registration dates to the same dates as their sessions**. This program-wide setting changes the registration dates and times for every session event to be the same as the registration dates and times for the session that contains it. For example, if you use this feature, all session events in Session #1 will have the same registration dates and times that you set for Session #1, and all session events in Session #2 will have the same registration dates and times that you set for Session #2.
- **Set all session event registration dates to the same dates**. This program-wide setting allows you to assign the same registration dates and times to every session event in every session of the program. If you use this feature, all session events in the program will have the same registration dates and times.
- **Set registration dates for all session events in a single session**. This session-wide setting allows you to assign the same registration dates and times for all session events in the selected session.

Set All Session Event Dates to the Same Dates as the Session

To change the registration dates of session events to the same date as the session that contains them, follow these steps at the MANAGE A PROGRAM page:

1. At the left, click **Sync Session Event Registration Dates**. The dates will be updated to match the session dates.

Set All Session Events in the Program to the Same Registration Dates

To change the registration dates of every session event in the program to the same registration dates, follow these steps at the MANAGE A PROGRAM page:

1. At the left, click **Set All Session Event Registration Dates**. The SET ALL SESSION EVENT REGISTRATION DATES AND TIMES page will be displayed.
2. In the REGISTRATION BEGIN DATE/TIME section, choose the date and time that registration will begin.
3. In the REGISTRATION END DATE/TIME section, choose the date and time that registration will end.
4. If you want to allow registration owners to change their registrations, follow these steps at the MODIFY REGISTRANTS section:
   - To allow changes, click the checkbox next to ALLOW REGISTRATION CHANGES.
   - In the UPDATE CHANGES ALLOWED UNTIL field, choose fthe end date for registration changes.
5. Click **Set**. All session events will be updated to the registration dates you entered.

Setting the same registration date and time for every session event in the program

Set All Session Events in a Session to the Same Registration Dates

To set registration dates for all the session events in a selected session, follow these steps at the MANAGE A SESSION page:

1. At the left, click **Set Session Event Registration Dates**. The SET SESSION EVENT REGISTRATION DATES AND TIMES page will be displayed.
2. In the REGISTRATION BEGIN DATE/TIME section, choose the date and time that registration will begin.
3. In the REGISTRATION END DATE/TIME section, choose the date and time that registration will end.
4. If you want to allow registration owners to change their registrations, follow these steps at the MODIFY REGISTRANTS section:
   - To allow changes, click the checkbox next to ALLOW REGISTRATION CHANGES.
   - In the UPDATE CHANGES ALLOWED UNTIL field, choose the end date for registration changes.
5. Click **Set**. All session events will be updated to the registration dates you entered.

Setting the same registration date and time for every session event in the program

SET SESSION EVENT REGISTRATION DATES AND TIMES

This feature sets the registration dates and times of **every session event in this session** to the dates and times that you select below. It does not change the dates of the session.

Session Event Registration Dates And Times For Educational Tracks

Registration Begin Date/Time: 4/6/2020 9 ▾ 00 ▾ AM ▾
Registration End Date/Time: 6/8/2020 5 ▾ 00 ▾ PM ▾
Modify Registrants: ☑ Allow registration changes. Update changes allowed until: 6/8/2020

Cancel   Set

Working With Program Facilities

The following topics are covered in this section:

- About Facilities and Facility Bundles
- Before You Start
- Creating and Assigning Facilities to a Program
- Creating a Facilities Bundle

About Facilities and Facility Bundles

For group signup programs, you can allow registration owners choose a facility during the registration process. For example, if you are managing a week-long sleepaway camp that groups attend together, you can let registration owners choose the facilities that best meet their groups' needs.

For each facility, you can configure the following:

- The minimum and maximum number of attendees per facility. If a group contains fewer than the minimum or greater than the maximum number of attendees for a facility, the facility will not be available for selection.
- Whether the facility can be used by multiple groups (up to the maximum number of attendees for the facility) or if use is limited to a single group.

Registration owners may only select facilities that can accommodate a group of their size and that are still available for a group of their size. The following is a sample facility configuration for a camp program.

Sample facilities configuration for a program

Facility Name	Allocation	Min	Max	Action
Bunkhouse 1	Multiple Groups	3	40	Edit Remove
Bunkhouse 2	Multiple Groups	3	50	Edit Remove
Cabin 1	Single Group	8	8	Edit Remove
Cabin 2	Single Group	8	8	Edit Remove
Cabin 3	Multiple Groups	3	15	Edit Remove

If a group of eight attendees were registering and no facilities were reserved yet, all of the facilities would be available for reservations because the group meets or exceeds the minimum requirement for all of the facilities.

If a group has between three and seven attendees, only Bunkhouse 1, Bunkhouse 2, and Cabin 3 will be visible during registration (assuming the facilities had enough space remaining to accommodate the group). Cabin 1 and Cabin 2 would not be displayed even if they were available because the group does not have those facilities' minimum requirement of eight attendees.

If a group of nine or more attendees were registering, only Bunkhouse 1, Bunkhouse 2, and Cabin 3 would be visible, because the group exceeds the maximum numbers for Cabin 1 and Cabin 2.

Bunkhouse 1, Bunkhouse 2, and Cabin 3 can be reserved by multiple groups. Every time a group reserves one of these facilities, the available space for other groups is decreased by the number of attendees in the group that reserved the facility.

Before You Start

Before you set up program facilities and facility bundles, gather the following information:

- The name of each facility
- The minimum and maximum number of attendees that can be accommodated in each facility
- Whether the facility can be used by multiple groups (up to the maximum number of attendees) or only by a single group

NOTE: If you're allowing registration owners to select facilities, it's a good idea to provide detailed information on the Facility Selection Page section to help registration owners select the best facility for their needs. For more information, see Allowing Registration Owners to Select Facilities.

Creating and Assigning Facilities to a Program

Getting Started

To get started with program facilities, follow this step:

1. At the main PROGRAMS page, click **Manage Facilities**. The EDIT FACILITY INFORMATION/VIEW FACILITY USAGE page will be displayed.

Edit Facility Information/View Facility Usage page for program facilities

EDIT FACILITY INFORMATION / VIEW FACILITY USAGE

Program	Edit Facilities	View Usage
Summer Group/Troop Camp Signup Individual	Edit Facility	View Usage
2020 Summer Group Camp	Edit Facility	View Usage
Learning Through Play II	Create Facility	
Volunteer Conference 2020	Create Facility	
Nature and Science Daycamp 2020	Create Facility	
2020 Leadership Conference	Create Facility	
		1 2

2. In the PROGRAM column, locate the program to which you want to assign facilities.

   NOTE: Programs that already have facilities are assigned are displayed before programs without facilities, and all programs are displayed in reverse chronological order. Use the page navigation numbers at the bottom of the table to find the page that contains your program.

3. Choose one of the following:
   - If no facilities are assigned to the program, click **Create Facility**.
   - If facilities are already assigned to the program, click **Edit Facility**.

   The CREATE/MODIFY PROGRAM FACILITIES Information page will be displayed.

Create/Modify Program Facilities Information

CREATE/MODIFY PROGRAM FACILITIES INFORMATION

Facility Name	Allocation	Min	Max	Action
Cabin 1	Multiple Groups	1	30	Edit Add
Cabin 2	Multiple Groups	1	30	Edit Add
Cabin 3	Multiple Groups	1	30	Edit Add
Lean to	Single Group	1	10	Edit Add
Lean-to	Single Group	1	10	Edit Add
Lean-to	Single Group	1	10	Edit Add
North Pavilion	Multiple Groups	1	100	Edit Add
Tent site 1	Multiple Groups	1	20	Edit Add
Tent site 2	Multiple Groups	1	20	Edit Add
Tent site 3	Multiple Groups	1	20	Edit Add
West Pavilion	Multiple Groups	1	75	Edit Add
				Add New Facility

Create and Assign a New Facility

To create a new facility for your organization and assign it to the program, follow these steps:

1. At the bottom of the ACTION column, click **Add New Facility**. A row for the new facility will be added to the table.
2. In the FACILITY NAME column, enter the name of the facility.
3. If only one group can use the facility during a session, follow these steps:
   - In the ALLOCATION column, select **Single Group**.
   - In the MIN column, enter the minimum number of attendees that must be in a group for this facility to be available. If the group contains fewer than the minimum attendees, the facility will not be displayed.

- In the MAX column, enter the maximum capacity of the facility. If a group contains more than the maximum number of attendees, the facility will not be displayed.

4. If more than one group can use the facility during a session, follow these steps:

- In the ALLOCATION column, select **Multiple Groups**.
- In the MIN column, enter the minimum number of attendees per group for this facility. If a group contains fewer than the minimum attendees, the facility will not be displayed.
- In the MAX column, enter the maximum capacity of the facility. If a group is larger than the remaining available spaces in the facility, the facility will not be displayed.

5. In the ACTION column, click **Save to List**. The facility will be added to the list and will be available as a selection for all of the organization's programs.
6. In the ACTION column, click **Add**. The facility will be assigned to the program.

Assigning an Existing Facility

To assign an existing facility to your program, follow this step:

1. In the ACTION column, click **Add**. The facility will be assigned to the program.

Editing an Existing Facility

To edit information for a facility, follow these steps:

1. In the ACTION column, click **Edit**. The row will be redisplayed so that you can modify the information.
2. In the FACILITY NAME column, modify the name of the facility as needed.
3. If only one group can use the facility during a session, follow these steps:

- In the ALLOCATION column, select **Single Group**.
- In the MIN column, enter or modify the minimum number of attendees that must be in a group for this facility to be available. If the group contains fewer than the minimum attendees, the facility will not be displayed.
- In the MAX column, enter or modify the maximum capacity of the facility. If a group contains more than the maximum number of attendees, the facility will not be displayed.

4. If more than one group can use the facility during a session, follow these steps:

- In the ALLOCATION column, select **Multiple Groups**.
- In the MIN column, enter or modify the minimum number of attendees per group for this facility. If a group contains fewer than the minimum attendees, the facility will not be displayed.
- In the MAX column, enter or modify the maximum capacity of the facility. If a group is larger than the remaining available spaces in the facility, the facility will not be displayed.

5. In the ACTION column, click **Save**. The changes to the facility information will be saved.

Creating a Facilities Bundle

You can "bundle" two or more facilities together so that registration owners can select a bundle of facilities that meets the needs of the group. The general steps to create a facilities bundle are the following:

- Create each individual facility that is part of the bundle
- Create a new facility to represent the facility bundle
- Assign the individual facilities to the bundle
- Assign the bundle to the program

Set up the Individual Facilities and the Bundled Facility

To set up the individual facilities that will be part of the bundle, follow these steps on the Create/Modify Program Facilities Information page.

1. Create each individual facility that will be part of the bundle. For example, if you are bundling the facilities North Pavilion and West Pavilion, create an individual facility for North Pavilion and an individual facility for West Pavilion.
2. Create a new facility to represent the bundle. For example, if you are bundling the facilities **North Pavilion** and **West Pavilion**, create a new facility called **North and West Pavilion Bundle**.
3. Assign the new bundled facility to the program.

Assign the Individual Facilities to the Bundle

To assign individual facilities to the bundle, follow these steps.

1. At the main FACILITIES page, click **Facility Bundles**. The MANAGE BUNDLED FACILITIES page will be displayed.
2. In the SELECT A BUNDLED FACILITY menu, select the name of the bundled facility that you created. The page will update to allow you to assign facilities to the bundle.
3. For each individual facility in the bundle, follow these steps:

   - In the AVAILABLE FACILITIES column, select a facility that is part of the bundle.
   - Click **Add**. The selected facility will be assigned to the bundle.

4. When all of the individual facilities are assigned to the bundle, click **Done**.

Adding individual facilities to a bundle

Testing Program Configuration

Before making a program available to the public, you should thoroughly test the registration process to ensure that it is set up correctly. Testing allows you to identify and fix configuration issues, confusing procedures, and content errors so that visitors to your Web site have a seamless and professional registration experience.

After you test the registration for a program and correct any issues, we strongly recommend that another member of your organization review the program as well. A person with no prior knowledge about the program configuration will approach the registration like a typical web site visitor, and can identify problems that the administrator may not have considered.

The following topics are covered in this section:

- [Making Sure Test Mode is Turned On](#)
- [Viewing the Program as a Visitor to Your Web Site](#)
- [General Principles for Testing Program Configuration](#)
- [Issues to Look For When Testing Program Configuration](#)
- [Turning Test Mode Off](#)

Make Sure Test Mode is Turned On
Link

View the Program as a Visitor to Your Web Site
To view the event as it appears to visitors to your Web site, follow these steps:

1. Save your changes to the program, session, and session event configuration.
2. On the MANAGE A PROGRAM page for the program, select a URL for the event and copy it to the clipboard.

   - To view a page that displays an overview of each session and includes information about facilities, select and copy the first URL.
   - To view a page that displays an overview of each session without facility information, select and copy the second URL.

3. Launch a different browser than the one you used to create the event. For example, if you created the event using the Chrome browser, launch Firefox, Internet Explorer, or Safari.

   NOTE: To see how the registration process appears to the public, you <u>must</u> use a browser in which you're not logged in to Doubleknot. It's not sufficient to open a new tab or window in the browser that you used to create the program.

4. Click in the Address bar of the new browser, and paste the URL for the event.
5. Press **Enter**. A page of information about all the sessions in the event will be displayed.

To allow other people to review the program, email them the URL and instructions to use a browser in which they are not already logged in to the Doubleknot system.

Principles for Testing Program Configuration
Testing program configuration requires completing the registration process several times for the purpose of finding errors both as a regular visitor to the web site and as an administrator. You should go through the registration process as many times as necessary to answer the following questions:

- If I enter or select information that meets the session or session event requirements, does the registration work as expected?
- If I enter or select incorrect information or information that doesn't meet the session or session event requirements, do I see the right error messages and have the opportunity to correct my errors?

Which items you should test depend on how the sessions and session events are configured. For example, if your program doesn't use price groups or price schedules, you don't need to worry about testing those options.

If your program is complex with multiple options for sessions and session events, you should test it several times and choose different options each time. For example, if you are using price groups, you should go through the registration process at least once for each price group. If you have a payment schedule, you should select various options and make sure they are displayed correctly on the payment page.

Issues to Look for When Testing Program Configuration

The following sections contain basic information about the kinds of issues you should look for when testing program configuration.

Session and Session Events

- Is the right information displayed? (E.g., dates, description, location, contact email, age requirements, etc.)
- Is the pricing displayed correctly? (If you enabled price groups but did not enter information about pricing in the Details section, price information will not be displayed on this page for registrant types assigned to price groups.)
- Are there typographical or grammatical errors?
- Do images and fonts appear correctly?
- Do links to other Web pages display the correct page?

Login Requirements

- If the sessions are configured so that registration owners must log in, is the logon prompt displayed? Are you allowed to register without logging in?

Price Groups

- If price groups are configured, are the correct price groups displayed?
- Are there any spelling, punctuation, or capitalization errors in the names of the price groups?

Group Information

- If you are collecting group information, are there any spelling, punctuation, or capitalization errors in the page instructions?
- Are the correct fields displayed?
- If users can select the group that they belong to, do the names of the groups appear correctly in the pop-up menu?

Registrant Information for Sessions and Session Events

- If you configured registrant types for the sessions or session events, are the correct registrant types displayed?
- Are the right costs displayed for each registrant type?
- Are there any spelling, punctuation, or capitalization errors in the registrant types?
- Is the correct information requested for each registrant type?
- Are the fields that are supposed to be required marked as required (with a red asterisk)?
- If you configured a minimum number of a registrant type per registration, try to register without the minimum number. Is the correct error message displayed?
- If you configured a maximum number of a registrant type per registration, try to register more than the maximum number. Is the correct error message displayed?
- If registrant ratios are configured, enter participants who do not meet the ratio requirements. Is the correct error message displayed?
- If you configured a minimum and/or maximum age, try to register participants who do not meet the age requirement. Is the correct error message displayed?

Forms

- If you assigned forms, are the forms displayed in the right order and at the right time?
- Does the registration procedure ask for redundant information at any time?
- Are the correct costs assigned for different options on the form?
- Are you allowed to skip entering information that should be required?
- Are you forced to enter information that should be optional?

Pre-Checkout

- If an Upsell Category was selected (and if your organization doesn't have an integrated donation campaign), are events from the Upsell Category displayed before checkout begins?
- Are all the items you added to the cart displayed in the cart before checkout?

Payment Options and Information

NOTE: While a session is in Test Mode, users without administrator privileges will not be allowed to check out and purchase the items in your shopping cart. However, you can test all other functions of the program.

- Are the correct payment options displayed for online only, mail only, or both online and mail payments?
- Are the correct payment amounts displayed?
- If a payment schedule is configured, are the correct options displayed?

Turning Test Mode Off

When you are confident that the program is configured correctly and ready to be available to the public, turn Test Mode off at the session level. As soon as Test Mode is turned off, any registration information that is entered will be saved. If the event is set to be published to the calendar, it will be displayed on the calendar.

To turn Test Mode off for all program sessions, follow these steps:

1. On any Manage a Program Session page, click **Edit**. A page asking if you want to edit all occurrences or only the selected session will be displayed.
2. Make sure that **Edit all occurrences and shared attributes** is selected.
3. Click **OK**. The Create and Modify page for the session will be displayed, but your changes will be made to all of the program sessions.
4. Scroll about halfway down the page to where the Test Mode options are displayed.
5. In the Test Mode section, select **Off**.
6. At the bottom of the page, click **Save**. Test mode will be turned off for all of the program sessions.

Copying a Program

If your organization will offer the same program again, Doubleknot makes it easy to copy an existing program so that you don't have to reconfigure all of the program information from scratch.

For example, if you're offering a summer daycamp next year that's essentially identical to the daycamp you offered this year, you can save time by simply copying the existing program and adjust the dates and information as needed.

Copying the Program

To copy a program, follow these steps:

1. At the MANAGE A PROGRAM page, click **Copy Program**. A dialog box will be displayed.
2. In the NEW DESCRIPTION field, enter the name of the new program.
3. Click **Copy**. The copy of the program will be created and the MANAGE A PROGRAM page will be displayed.

Updating Session Dates and Session Event Dates

The new copy of the program will contain one session and all of the session event groups and events. The dates of the session and the session events will be the same as the original.

You must update the activity dates and times and the registration dates and times for both the session and the session events.

When the session dates/times and session event dates/times are updated for the new program, you should create the second and following sessions.

Testing the Copied Program

Be sure to fully test every element of the copied program to make sure that it's correct.

Program Configuration Worksheets

Use the worksheets in this section to gather the configuration information for your program, sessions, and session events.

Group Signup Program Worksheet

Item	Information required	Answer
Program Name (not displayed to visitors)	Overall program name (e.g., 2014 Summer Camp)	Name:
Effective Dates	Date of first day of the first session, and last day of the last session	Effective Date: End Date:
Program Type	<Do not change default>	<Leave Calendar Activity selected>
Event Type	Group Signup	Group Signup
Require Facility	Is the registration owner required to select a facility?	Facility required: Yes / No
Limit Registration Changes	Can registration owner change the number of registrants?	Choose one: -Can change the number of registrants -Cannot decrease the number of registrants -Cannot increase the number of registrants -Cannot change the number of registrants
General Instructions For Registration Home Page	Text to display at the beginning of the registration process	Text (500 char)
Reserve Block Page	Should page be displayed? If yes: • Text for Quick Links button • Text to display on page	Display this page? Y / N Button text: Page text: (500 char)
Name Individuals Page	Should page be displayed? If yes: • Tsext for Quick Links button • Text to display on page	Display page? Y / N Button text: Page text: 500 char
Signup Method	Should registrants be signed up by individual or by activity?	Signup by Individual / Signup by Activity
Check For Scheduling Conflicts Page	Should page be displayed? If yes: • Text for Quick Links button • Text to display on page	Display page? Y / N Button text: Text to display (500 char)
Facility Selection Page	Should page be displayed? If yes: • Text for Quick Links button • Text to display on page	Display page? Y / N Button text: Text to display (500 char)
Edit Group Page		Text to display (500 char)
Edit Group Form Page		Text to display (500 char)

Individual Signup Program Worksheet

Item	Information required	Answer
Program Name (not displayed to visitors)	Overall program name (e.g., 2014 Summer Camp)	Name:
Effective Dates	Date of first day of the first session, and last day of the last session	Effective Date: End Date:
Program Type	<Do not change default>	<Leave Calendar Activity selected>
Event Type	Individual signup	Individual Signup
Instruction For Activity Signup	Text to be displayed on the activity signup page	Text (500 char)
Minimum Number Of Classes That Must Be Registered For	The minimum number of sub-activities that must be selected to complete a registration	Minimum number of activities: __ **Warning**: Be careful with this setting, since its use can keep people from registering

Session—General Information Worksheet

Item	Information required	Answer
DESCRIPTION	Name of session (displayed on calendar)	Session name:
ACTIVITY DATE	If the session occurs on a single day, what is the date? If the session occurs across multiple dates, what are the beginning and end dates?	__ Single date __ Multiple dates Beginning date: End date:
ACTIVITY TIME	What time does the session begin and end? **WARNING**: Don't set session times until you are certain it won't change.	Beginning time: End time:
URL TO EVENT PICTURES	Is there a Web page where photos from the session will be displayed? If so, what is the URL?	URL:
URL FOR ADDITIONAL DETAILS	Is there a Web page with detailed information about this event? If so, what is the URL?	URL:
CONTACT E-MAIL	What is the e-mail address of the contact person for this event?	Contact email:
DETAILS	What additional information about the event should be displayed?	(Use another sheet to list details)
ADDRESS	Where will the event take place? (City, state, ZIP)	Address:
DISPLAY	Should the session be displayed on the calendar?	Yes / No
UPSELL CATEGORY	Should the session be associated with a specific Upsell Category? If yes, which category? (Will not be used if your organization has integrated a checkout donation request.)	Yes / No Upsell Category:
CATEGORY 1, 2, 3	What category(ies) should this session be assigned to? The session will be displayed in every location where information from the category is displayed.	Category(ies), if any: 1. 2. 3.

Session—Online Registration Details Worksheet

Item	Information to enter	Answer
REGISTRATION BEGIN DATE AND TIME	On what date and time should online registration be available?	Date: Time:
REGISTRATION END DATE AND TIME	On what date and time should online registration end?	Date: Time:
COST IS PER	How are the fees assigned? • Is there a fee each registrant and no overall registration fee? OR • Is there a fee for each registrant *and* a registration fee?	Named Registrant OR Named Registrant and Per Registration
REGISTRANT COST	Is there a single cost for each registrant, or are there different costs for different kinds of registrant? NOTE: You can also assign registrant costs to price groups.	Single cost: Multiple cost per registrant type: Type/cost: Type/cost: Type/cost:
REGISTRATION COST	If the cost is per Named Registrant and per Registration, what is the Registration cost?	Registration Cost:
MIN REGISTRANTS PER REGISTRATION	What is the minimum number of registrants that a person can register at one time?	Minimum registrants:
MAX REGISTRANTS PER REGISTRATION	What is the maximum number of registrants that a person can register at one time?	Maximum registrants:
MAXIMUM ATTENDEES	What is the maximum number of attendees for the event?	Overall maximum attendees:
WAITLIST SIZE	Is there a waitlist for this event? If there is, what size is the waitlist?	Yes / No If yes, waitlist size:
EARLY DISCOUNT APPLIED BEFORE:	Is there a discount for early registration? If there is, what is the last date for the discount, and how much (in dollars) is the discount?	Yes / No If yes, discount amount:
LATE FEE APPLIED AFTER:	Is there a late fee for registering after a certain date? If yes, on what date does the late fee begin? How much is the late fee?	Yes / No If yes, late fee:
MIN AGE (MONTHS) MAX AGE (MONTHS)	If the event is limited to participants depending on their age, what is the minimum and/or maximum age in months?	Minimum age: ____ months Maximum age: ____ months
RECEIPT CONTACT INFO	By default, these fields will contain the name, address, and phone number associated with your account. If different contact information should be on the receipt, enter it here.	Contact information to display on the receipt: Name: Address: Phone number
RECEIPT CONFIRMATION MESSAGE	What information should be on the receipt confirmation message that is displayed after the registrant completes registration and in the registration confirmation email?	Confirmation message:
CANCELLATION POLICY	What cancellation policy should be displayed on the receipt and in the registration confirmation email?	Cancellation policy:
NOTIFICATION	Who should receive an email copy of each registrant's confirmation receipt?	Yes / No Email addresses:
MODIFY REGISTRANTS	Can a registration owner modify information after it's been submitted? If yes, what is the last date on which changes are allowed?	Yes / No If yes, final date for changes:
LOG ON (SIGN ON) PROMPT	Should registration owners be required to log on to register? If they're not required to log on, should they be prompted to log on anyway?	Choose one: • Log on is required • Log on is optional • No prompt to log on
PROMPT TO SIGNUP FOR ELISTS	Ask registration owners to sign up for elists?	Yes / No
SKIP REGISTRATION DETAILS	Should an information page be displayed before the registration process?	Yes / No

TICKETING AND EVENT ADMISSION	Should a ticket be issued? If yes: Is there a ticket for each individual or for the whole group? For individual tickets, are in/out privileges available? Should a link to the ticket appear on the receipt? When does check-in for the event begin? Should an event reminder be sent to the registration owner?	Yes / No If yes: Issue ticket for individuals / group For individual tickets, are there in/out privileges? Yes / No Print link on receipt? Yes / No When does event check-in begin? ___ hours before the event Send a reminder? Yes / No If yes, ___ hours before event
TICKETING AND ADMISSION	Should a ticket be issued? If yes: Is there a ticket for each individual or for the whole group? Should a link to the ticket appear on the receipt? When does check-in for the event begin? Should a reminder be sent to the registration owner?	Yes / No If yes: Issue ticket for individuals / group Print link on receipt? Yes / No When does check-in begin? ___ hours before the event Send a reminder? Yes / No If yes, ___ hours before event

Session Event Group Worksheet

Complete information for each of the program's session event groups and session events.

Item	Information to enter
Session Event Group 1	• Name: • Start and end dates: • Active or inactive?
Session Event Group 2	• Name: • Start and end dates: • Active or inactive?
Session Event Group 3	• Name: • Start and end dates: • Active or inactive?
Session Event Group 4	• Name: • Start and end dates: • Active or inactive?
Session Event Group 5	• Name: • Start and end dates: • Active or inactive?
Session Event Group 6	• Name: • Start and end dates: • Active or inactive?

Session Event Information Worksheet

Item	What it wants	Your info
DESCRIPTION	What is the name of the session event ?	Name:
ACTIVITY OR CLASS START AND END DATE	If the session event occurs on a single day, what is the date? If the session event occurs across multiple dates, what are the beginning and end dates?	__ Single date __ Multiple dates Beginning date: End date:
ACTIVITY TIME	What time does the session event begin and end?	Beginning time: End time:
URL TO EVENT PICTURES	Is there a Web page where photos from the session event will be displayed? If so, what is the URL?	URL:
URL FOR ADDITIONAL DETAILS	Is there a Web page with detailed information about this session event? If so, what is the URL?	URL:
CONTACT E-MAIL	E-mail address of the contact person	Contact email:
DETAILS	Additional details about the about the session event	Details:
ADDRESS	Where will the event take place?	Address:
REGISTRATION BEGIN DATE AND TIME	On what date and time should online registration be available?	Date: Time:
REGISTRATION END DATE AND TIME	On what date and time should online registration end?	Date: Time:
REGISTRANT COST	Is there a single cost for each registrant, or are there different costs for different kinds of registrant? NOTE: You can also assign registrant costs to price groups.	Single registrant cost: Multiple cost per registrant type: Type/cost: Type/cost: Type/cost:
MIN REGISTRANTS PER REGISTRATION	What is the minimum number of registrants that a person can register at one time?	Minimum registrants:
MAX REGISTRANTS PER REGISTRATION	What is the maximum number of registrants that a person can register at one time?	Maximum registrants:
MAXIMUM ATTENDEES	What is the maximum number of attendees for the event?	Overall maximum attendees:
WAITLIST SIZE	Is there a waitlist for this event? If there is, what size is the waitlist?	Yes / No If yes, waitlist size:
EARLY DISCOUNT APPLIED BEFORE:	Is there a discount for early registration? If yes, last date of discount and cost in dollars.	Yes / No If yes, discount amount:
LATE FEE APPLIED AFTER:	Is there a late fee after a certain date? If yes, what is the date? How much is the late fee?	Yes / No If yes, late fee:
MIN AGE (MONTHS) MAX AGE (MONTHS)	If the event is limited based on age, what is the minimum and/or maximum age in months?	Min age: ____ months Max age: ____ months
ALLOW REGISTRATIONS FROM	Is registration limited to members who have signed in, or may anyone register?	Members who sign in / Anyone
MODIFY REGISTRANTS	Can registration owner change information? If yes, what is the last date on which changes are allowed?	Yes / No If yes, final date:

If the session event is a class, name of instructor: _____

Facilities Configuration Worksheet

Which facilities should be assigned to this program?

Are all of these facilities already defined? Yes/No

If any of them are undefined, use the Facilities Creation Worksheet to help you create the facilities.

Do you need to create facility bundles? Yes/No

If you need to create facility bundles, use the Facility Bundles Worksheet to help you create the bundles.

Facilities Creation Worksheet

Facility Name	Single Group or Multiple Group?	Minimum Capacity	Maximum Capacity

Facility Bundles Worksheet

Bundle Name	Facilities in Bundle