



# Managing Program Registrations

## User Guide

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# About Managing Program Registrations

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The following topics are covered in this section:

- [Can I Move Registrants Off of a Waitlist?](#)
- [How Do I Handle Mail-In Registration Payments?](#)
- [What Happens When I Delete a Registration?](#)
- [My Program is Starting Soon—What Should I Do?](#)

## Can I Move Registrants Off of a Waitlist?

As an administrator, you can move registrants off of a waitlist for a session or session event even if the maximum number of attendees has been reached. For more information, see [Managing Waitlists](#).

## How Do I Handle Mail-In Registration Payments?

If your organization is accepting mail-in payments for a program, you must manually post any offline payments that you receive and assign them to the correct registration. After the payment is posted, you should issue a receipt so that the registration owner is informed of the updated balance.

**NOTE:** If your program sessions offer a payment schedule, it's critical that you enter offline payments as quickly as possible. Otherwise, the registration owner may not receive the appropriate early payment discount or may be charged an incorrect late fee.

If you are creating a new registration that's being paid for with a check, you should not issue a receipt until after you post the check. If you issue a receipt before the payment information is entered, the receipt will show that there is a balance due.

Instructions for handling mail-in payments are located in [Entering a New Registration with Offline Payment](#).

## What Happens When I Delete a Registration?

When you delete a registration, all the registrants from that registration are removed from the list of attendees for the session and any session events they were registered for. However, registration payments are not automatically refunded. If a refund is due to the registration owner, you must manually issue the refund before deleting the registration. For more information, see [Cancelling Registrations and Issuing Refunds](#).

## My Program is Starting Soon—What Should I Do?

In the last few weeks or days before a program starts, someone in your organization should address the following:

- If spaces are still available, let people know they can still register! Send a targeted email, update your web site, share the information in a newsletter, post flyers, etc.
- If you want to send a custom reminder or last-minute information to attendees, use the Communications Center.
- Check for outstanding payments. Use the [Balance Due By Session report](#) to see which registrations have balances due, and take the appropriate actions to collect outstanding payments or adjust registration information.
- Make sure that you're ready to check in attendees.

# Displaying the Manage a Program Session Page

Registration management for program occurs in the Manage a Program Session page for each session. To display the Manage a Program Session page, follow these steps:

1. In Event Management, click the **Programs** tab. The Programs page will be displayed.
2. Locate and select the program whose registrations you want to work with. The Manage a Program page for that program will be displayed.
3. In the Session area of the page, locate and select the session whose registration you want to work with. The Manage a Program Session page will be displayed.

*Manage a Program Session page*

**Manage A Program Session**

2014 Nonprofit Fundamentals Conference  
<http://www.doubleknot.com/event/2014-nonprofit-fundamentals-conference/1035649>  
 2/27/2014 - 2/28/2014  
 Register between 9/12/2013 and 1/17/2014

Financial		Registration Status	
Total Booked	\$14,530.00	Completed Registrations	5
Total Collected	(\$5,530.00)	Pending Registrations	0
Outstanding	\$9,000.00	Deleted Registrations	7

Total Registrants				
	Capacity	Registered	Waitlisted	Remaining
General	15	14	0	1
<b>Total</b>	<b>15</b>	<b>14</b>	<b>0</b>	<b>1</b>

Session Events			
Description	Start Date	End Date	
Board Development	2/27/2014 9:00 AM	2/27/2014 11:30 AM	
Capacity Building	2/27/2014 9:00 AM	2/27/2014 11:30 AM	
Human Resources	2/27/2014 9:00 AM	2/27/2014 11:30 AM	
Program Development	2/27/2014 9:00 AM	2/27/2014 11:30 AM	

# Entering New Registrations

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Doubleknot's online registration capabilities make it easy for people to register and pay for program sessions. However, sometimes you may have to create a new registration on behalf of a constituent. For example, if someone calls to register for a program session, an administrator must create a new online registration with the information that the caller provides. Or, if you allow mail-in registrations, you will have to manually enter the mailed-in registration and payment information into Doubleknot.

The following topics are covered in this section:

- [Starting a New Registration](#)
- [Entering Online Payment Information for a New Registration](#)
- [Entering Offline Payment Information for a New Registration](#)

## Starting a New Registration

When you enter a new registration for a program session, the first several pages that are displayed depend on how the program is configured. For example, you may be asked to do any of the following:

- Select a registration owner or create a new one
- Select a price group
- Select a group or enter information about a new group
- Enter information about each registrant
- Register attendees for session events
- Select a facility for the group
- Complete forms for individual registrants and/or the group

## *New Registration for Individual Signup Programs*

To enter a new registration for an individual signup program, follow these steps.

1. Display the Manage a Program Session page for the session. .
2. At the right, click **New Registration**. The Search and Select Owner page will be displayed.
3. To see if the owner of the new registration already has a profile, follow these steps:
  - In the First Name and/or Last Name fields, type the registration owner's first and/or last names.
  - Click **Search**. A list of members that match your search criteria will be displayed.
  - If the registration owner is listed, click **Select**. The registration owner's information will be displayed on the following pages.
  - If the owner is not listed, or if no results are found, click **New Owner**. At the end of the registration, you will enter information to identify the new registration owner, and a member profile will be created on their behalf.
4. Follow the registration process for the session. As an administrator, this part of the registration process will be essentially the same as if you were a visitor to your web site.
5. When you are finished entering the requested information, the Shopping Cart page will be displayed with a summary of the registration information and the amount due.
6. At the bottom of the Shopping Cart summary page, click **Checkout**.
7. Choose one of the following to complete the registrations:
  - If the registration will use an online payment method such as credit card, electronic check, or gift card (if your organization accepts them), follow the steps in [Entering Online Payment Information for a New Registration](#).
  - If the registration will use an offline payment method, follow the steps in [Entering Offline Payment Information for a New Registration](#).

## ***New Registration for Group Signup Programs***

If the program is configured for group signup, follow these steps:

1. Display the Manage a Program Session page for the session.
2. At the right, click **New Registration**. The Select Group page will be displayed.
3. To see if a registration profile is available for this group, scroll through the pages or follow these steps to search for the profile:
  - From the Group Name pop-up menu, select the criteria you want to search by. (**Group Name** is the default criteria.)
  - Enter a few characters of the search criteria in the field.
  - Click **Search**. A list of group that match your search criteria will be displayed.
4. Follow one of these steps:
  - If the group is listed, click **Select**. The registration Quick Links page will be displayed. Go to step 5.
  - If the owner is not listed, or if no results are found, click **New Group**. The Edit Group page will be displayed.
  - Enter information for the group, and click **Continue**.
5. Complete the registration process on behalf of the customer. As an administrator, this part of the registration process will be essentially the same as if you were a visitor to your web site.
6. When you are finished entering the requested information, the Shopping Cart page will be displayed with a summary of the registration information and the amount due.
7. At the bottom of the Shopping Cart summary page, click **Checkout**.
8. Choose one of the following to complete the registrations:
  - If the registration will use an online payment method such as credit card, electronic check, or gift card (if your organization accepts them), follow the steps in [Entering Online Payment Information for a New Registration](#).
  - If the registration will use an offline payment method, follow the steps in [Entering Offline Payment Information for a New Registration](#).

## **Entering Online Payment Information for a New Registration**

If you're entering a new registration that will be paid for immediately by credit card, e-check, or gift card, follow the steps in this section. For example, use this procedure if you're creating a new registration for someone on the phone who will provide their credit card information.

### ***Entering Online Payment Information***

To enter online payment information, follow these steps:

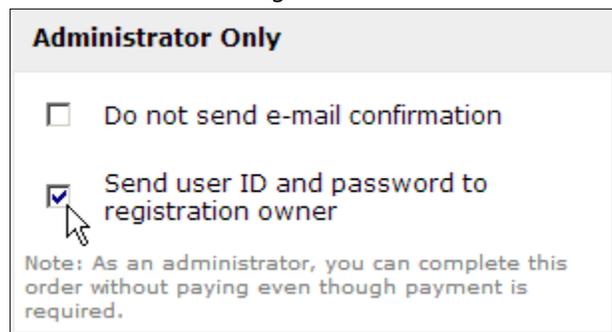
1. In the Payment Type section, select **Credit Card**, **eCheck**, or **Gift Card** (only available for organizations that use Mercury payment processing services). Fields to enter payment information for the selected payment type will be displayed. (Instructions for handling mail-in and other offline payments are located in the next section.)
2. Enter the required payment information in the fields.
3. For the Name and Billing Address section, follow one of these steps:
  - If you selected an existing owner profile when you began the registration, confirm that the displayed name and billing address are correct. (For example, if the registration owner is paying by credit card, make sure that the name and billing address are the ones associated with that credit card.)
  - If the name and billing address for your administrator account are displayed, enter the correct name and billing address for the registration owner instead.

### **Setting Administrator Only Options and Completing the Registration**

To set administrator-only options and complete a registration with online payment, follow these steps:

1. When you create a new registration with online payment, a confirmation receipt should be emailed to the registration owner. To ensure that a confirmation receipt is emailed to the registration owner, make sure that **Do not send e-mail confirmation** is not selected in the E-mail Confirmation: section. (By default, this item is not selected.)
2. If you created a new owner for the registration, or if the registration owner doesn't know their logon information, select **Send user ID and password to registration owner**. The registration owner will receive an email with logon information for their profile, which will allow them to update the registration, make additional payments, and use their profile to register for later events.

*Setting Administrator Only options for a registration with online payment and a new registration owner*



**Administrator Only**

Do not send e-mail confirmation

Send user ID and password to registration owner

Note: As an administrator, you can complete this order without paying even though payment is required.

3. At the right side of the page, click **Make Payment**. The payment will be processed and the Adjust Balance page for the registration will be displayed. In most cases, you will not need to adjust the balance because the online payment has already been processed and applied.
4. At the bottom of the Adjust Balance page, click **Done**.

### **Entering Offline Payment Information for a New Registration**

If you are entering a new registration that will be paid for with an offline method, follow the steps in this section. For example, use this procedure if you received a registration form and a check by postal mail.

Offline payment information is entered after the registration is completed. When you're creating a new registration with offline payment, make sure that a confirmation receipt is not sent when the registration is completed—because the payment information hasn't been entered, the confirmation receipt will show a balance due even though the registration owner has sent an offline payment. Instead, you should send the confirmation receipt after you post the offline payment information.

### **Entering Billing Information**

To enter online payment information and complete the registration, follow these steps:

1. In the Payment Type section, select **Mail**.
2. For the Name and Billing Address section, follow one of these steps:
  - If you selected an existing owner profile when you began the registration, confirm that the displayed name and billing address are correct.
  - If the name and billing address for your administrator account are displayed, update the name and billing address with the registration owner's information.

### **Setting Administrator Only Options and Completing the Registration**

To set administrator-only options and complete the registration, follow these steps:

1. To suppress sending an email confirmation at the end of the registration process, select **Do not send e-mail confirmation** in the E-mail Confirmation: section. This ensures that the registration owner does not receive a receipt until their offline payment is posted.

- If you created a new owner for the registration, or if the registration owner doesn't know their logon information, select **Send user ID and password to registration owner**. The registration owner will receive an email with logon information for their profile, which will allow them to update the registration, make additional online payments, and use their profile to register for later events.

*Configuring Administrator Only options for a registration with offline payment.*

**Administrator Only**

Do not send e-mail confirmation

Send user ID and password to registration owner

Note: As an administrator, you can complete this order without paying even though payment is required.

- At the right side of the page, click **Save**. The registration will be completed, and the Adjust Balance page will be displayed so you can enter the offline payment information.

*After you save a registration that will be paid for with offline payment, the Adjust Balance page for the registration is displayed.*

Adjust Balance					
Transaction History for Order 12957					
Transaction Time	Account	Posting Date	Type	Details	Amount
4/16/2014 2:06:30 PM	Summer Camps	4/16/2014	Online Purchase	New registration	\$370.00
				<b>Balance</b>	<b>\$370.00</b>
Order 12957					
Total Adjustment: \$ <input type="text"/>					
Adjustment Type: <input type="text" value="Offline Check Payment"/>					
Posting Date: <input type="text" value="4/16/2014"/>					
Adjustment Description: <input type="text"/>					
Item #	Description	Amount	Payments and Adjustments	Balance	Adjustment
2830830	Summer Daycamp--Session 2	\$370.00	\$0.00	\$370.00	\$ <input type="text"/>
	<b>Total</b>	<b>\$370.00</b>	<b>\$0.00</b>	<b>\$370.00</b>	
<input type="button" value="Done"/> <input type="button" value="Adjust"/> <input type="button" value="Issue Receipt"/>					

### **Entering the Offline Payment Information**

After creating the registration, you must adjust the balance to reflect the offline payment and issue a receipt that shows the updated balance. To post an offline payment, follow these steps on the Adjust Balance page:

1. In the Total Adjustment field, enter the amount of the payment.
2. In the Type pop-up menu, select one of the following (the other options in the menu are not appropriate for posting offline payments):
  - **Offline Check Payment**
  - **Offline Credit Card Payment**
  - **Offline Cash Payment**
3. By default, the posting date is today's date. To post the payment on another date, enter the date or select it from the calendar in the Posting Date field.

**NOTE:** Be sure to enter the correct posting date. If your event has early registration discounts, late fees, or payment schedules, entering the correct posting date can make a difference in the total balance due.

4. In the Adjustment Description field, enter a description of the adjustment. For example, enter the check number to record a payment by check.
5. At the bottom of the page, locate the line item for the registration. (If the registration was the only item that was purchased in this order, it will be the only line item.)
6. In the Adjustment field at the right of the registration item, enter the amount of the payment.

**NOTE:** If the purchase contained items other than the registration and the payment should be applied to more than one item, enter the amount to apply to each item in the Adjustment fields. The sum of the amounts in the Adjustment fields must equal the amount that you entered in the Total Adjustment field. If the amounts are not equal, the **Adjust** button will be grayed out and you will not be able to complete the adjustment.

7. Click **Adjust**. A confirmation dialog box will be displayed.
8. In the dialog box, click **OK**. The balance will be adjusted, and the changes will be reflected in the transaction history at the top of the page.

**NOTE:** Once an adjustment is posted, it can't be changed. If you need to correct an error, you must post an offsetting adjustment.

9. Follow the steps in the next section to send a receipt to the registration owner.

In the following example, an offline check payment of \$370 is being entered for a new registration. The check number is used as a description for the adjustment.

Example: Adjusting a registration to reflect an offline check payment of \$370

Adjust Balance						
Transaction History for Order 12957						
Transaction Time	Account	Posting Date	Type	Details	Amount	
4/16/2014 2:06:30 PM	Summer Camps	4/16/2014	Online Purchase	New registration		\$370.00
					<b>Balance</b>	<b>\$370.00</b>
Order 12957						
Total Adjustment: \$ <input type="text" value="370"/>						
Adjustment Type: <input type="text" value="Offline Check Payment"/>						
Posting Date: <input type="text" value="4/16/2014"/>						
Adjustment Description: <input type="text" value="Check #1776"/>						
Item #	Description	Amount	Payments and Adjustments	Balance	Adjustment	
2830830	Summer Daycamp--Session 2	\$370.00	\$0.00	\$370.00	\$	<input type="text" value="370.00"/>
		<b>Total</b>	<b>\$370.00</b>	<b>\$0.00</b>	<b>\$370.00</b>	<b>\$370.00</b>
<input type="button" value="Done"/> <input type="button" value="Adjust"/> <input type="button" value="Issue Receipt"/>						

After the administrator clicks **Adjust**, the transaction history is updated to show that the offline payment was applied to the balance due. Next, the administrator will issue a receipt that shows the updated balance.

Adjust Balance						
Transaction History for Order 12957						
Transaction Time	Account	Posting Date	Type	Details	Amount	
4/16/2014 2:06:30 PM	Summer Camps	4/16/2014	Online Purchase	New registration		\$370.00
4/16/2014 2:13:07 PM	Summer Camps	4/16/2014	Offline Check Payment	Offline Check Payment (Check #1776) made through store order 12957		(\$370.00)
					<b>Balance</b>	<b>\$0.00</b>
Order 12957						
Total Adjustment: \$ <input type="text"/>						
Adjustment Type: <input type="text" value="Offline Check Payment"/>						
Posting Date: <input type="text" value="4/16/2014"/>						
Adjustment Description: <input type="text"/>						
Item #	Description	Amount	Payments and Adjustments	Balance	Adjustment	
2830830	Summer Daycamp--Session 2	\$370.00	(\$370.00)	\$0.00	\$	<input type="text"/>
		<b>Total</b>	<b>\$370.00</b>	<b>(\$370.00)</b>	<b>\$0.00</b>	

### ***Sending a Receipt that Reflects the Adjusted Balance***

To send a receipt after adjusting the balance, follow these steps on the Adjust Balance page:

1. Click **Issue Receipt**. The receipt will be displayed.
2. At the top of the page, enter the email address where the receipt should be sent. (By default, the field contains the address of the registration owner.)
3. Click **Send**. The receipt will be emailed.
4. To leave the receipt, scroll to the bottom of the page and click **Done**.

# Searching For Registrations

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The following topics are covered in this section:

- [Searching for Registrations from the Manage a Program Session Page](#)
- [Searching Registrations in All Events](#)

## About Searching for Registrations

Doubleknot offers two ways to locate registrations:

- From the Manage a Program Session page, which limits the search to registrations for the selected session. You can search by registration date, registration number, or the name of the registration owner. This search method makes it easy to quickly find registrations for program sessions.
- From the overall Event Management page, where you can search all events of all kinds in all organizations. This method offers the greatest flexibility for searching, and allows you to locate registrations by searching for a registrant's name even if the registrant is not the registration owner.

## Searching for Registrations from the Manage a Program Session Page

To search within registrations for an individual session, follow these steps:

1. At the Manage a Program Session page, click **Manage Registrations**. The Manage Registrations page for the session will be displayed, showing all registrations for the session.
2. To change the number of rows displayed on the page, select the desired number from the Rows to Display pop-up menu.
3. To search for a specific registration or range of registrations, use the steps in the following table:

To search by	In the pop-up menu, select	Enter
Registration date	<b>Registered After</b>	The starting date of the registrations you are searching for
Registration number	<b>Registration #</b>	The registration number of the registration you are searching for
Group name (for group signup programs only)	<b>Group Name contains</b>	The name of the group whose registration you are searching for
Last name of the registration owner	<b>Last Name contains</b>	The registration owner's last name (or a few characters)
First name of the registration owner	<b>First Name contains</b>	The registration owner's first name (or a few characters)

4. Click **Search**.

All registrations that meet your search criteria will be displayed.

**NOTE:** The search results will contain information about active registrations as well as registrations that have been deleted.

For registrations that have not been deleted, the following options are available in the Action column:

- **Edit Registration** allows you to modify registration information including group information (for group signup programs), registrants, session events, and payment information.
- **View Detail** displays a summary of registration information for the session, including registrants and payment history.
- **View Payments** displays payment details for the registration, and allows you to adjust the balance or issue a receipt. More information about adjusting the balance is located in [Adjusting a Registration Balance](#).
- **Edit Owner** allows you modify information about the registration owner and group (if a group signup program).

- **Checkin** allows you to check in any or all of the registrants for the session.
- **Delete Registration** allows you to delete the registration. Before you delete a registration, you should issue any refunds. Information about issuing refunds and deleting registrations is located in [Cancelling Registrations and Issuing Refunds](#).

For registrations that have been deleted, only **View Detail** and **View Payments** are available in the Action column.

## Searching Registrations in All Events

Doubleknot's advanced Registration Search feature allows you to search registrations for any or all calendar activity, dues, fund raiser, or program events. In Registration Search, you can search by a registrant's name if you don't know the name of the registration owner.

### Accessing Registration Search

To access the Registration Search feature, follow these steps:

1. From the main Doubleknot page, click **Event Management**.
2. At the far right at the top of the page, click **Registration Search**. The Search Registrations, Memberships and Reservations page will be displayed.

#### *Accessing the Registration Search feature in Event Management*



### Entering Search Criteria

To enter search criteria, follow these steps:

1. To limit your search to events in a specific organization, select the organization whose events you wish to search from the Organization menu.
2. To search by the name of the program, enter a few characters of the program name in the Event, Membership or Facility Name field.
 

**NOTE:** On this page, Facility Name searches for reservations in the Facilities module, not facilities assigned to group signup programs.
3. To search for registrations within a specific date range:
  - Click the mouse in the first Search Registrations/Purchases From field and select the desired starting date.
  - If you want to specify an end date for your search, click the mouse in the Until field and select the desired end date.
4. Enter any of the following criteria:
  - To search by a registration number, enter the number in the Registration, Reservation, or Membership Number field.
  - To search by an order number, enter the number in the Order Number field.
  - To search by a payment number, enter the number in the Payment Number field.
  - If the event is configured to collect group information and you want to search by group name, enter the name in the Group Name field.
  - To search by registrant, enter the registrant's name in the Registrant or Member Name field.

**NOTE:** If the registrant is not the registration owner, the registrant's name will not be displayed in the results. Only the registration owner's name will be displayed.

- To search by the registration owner's email address, enter the email address in the Registration Owner/Purchaser E-mail field. If you enter a partial email address, all registrations with owner email addresses matching the characters you entered will be displayed.

5. To change the order in which results are displayed, select one of the following from the Sort By pop-up menu:
  - **Registration/Purchase Date**
  - **Number** (sorts by registration number)
  - **Event/Membership/Facility Description** (sorts alphabetically by the name of the program)
  - **Event Date**

6. Click **Search**. Registrations matching your search criteria will be displayed beneath the search fields. In the following Registration Search example, the name "Peter Parker" is entered in the Registrant or Member Name field. The results include one registration for which Peter Parker is the registration owner and one registration owned by Lois Lane in which Peter Parker is a registrant.

*Example: Peter Parker is the owner of the first registration in the list, and a registrant on the second registration, which is owned by Lois Lane.*

Number	Purchase Date	Purchased BY	E-mail	User Name	Group Name	Description	Organization	Date	Action
2828949	10/21/2013 4:25:44 PM	parker, Peter	Spidey@mailinator.com	SPIDEY@MAILINATOR.COM		2014 Nonprofit Fundamentals Conference	San Jose Zoo	02/27/2014	<a href="#">View Detail</a> <a href="#">View Payments</a> <a href="#">Checkin</a> <a href="#">Delete</a>
2828951	10/21/2013 4:52:50 PM	Lane, Lois	LoisLane@mailinator.com	LANEL	Smallville Elementary	Campstravaganza Session #1 - July 11 to July 13	San Jose Zoo	07/11/2014	<a href="#">View Detail</a> <a href="#">View Payments</a> <a href="#">Checkin</a> <a href="#">Delete</a>

For registrations that have not been deleted, the following options are available in the Action column:

- **View Detail** displays a summary of the registration, including registrants and payment history.
- **View Payments** displays payment details for the registration, and allows you to adjust the balance or issue a receipt. More information about adjusting the balance is located in [Determining if the Balance Must Be Adjusted](#).
- **Checkin** allows you to check in any or all of the registrants.
- **Delete** allows you to delete the registration. Before you delete a registration, you should issue any refunds. Information about issuing refunds and deleting registrations is located in [Cancelling Registrations and Issuing Refunds](#).

For registrations that have been deleted, only the **View Detail** and **View Payments** options are available.

# Viewing and Changing Registrations

---

As an event administrator, you can modify information in any existing registration. The following topics are covered in this section.

- [Viewing Detailed Information About a Registration](#)
- [Issuing Another Registration Receipt](#)
- [Adding, Removing, or Modifying a Program Registration](#) (and updating payment information if necessary)
- [Viewing Payment Details for a Registration](#)
- [Applying a Payment Without Changing Registrant Information](#)
- [Assigning a New Registration Owner \(Reassign Purchaser\)](#)
- [Moving a Registration with the Move Registration Tool](#)

## Viewing Detailed Information About a Registration

To view detailed information about a registration, follow these steps.

1. Locate the registration using the steps in [Searching for Registrations](#).
2. Click **View Detail**. The View Details page for the registration will be displayed with detailed information about the registration, including when the registration was created; when it was updated, and by whom; information about the registration owner; information about individual registrants; the payment history; and the update history.
3. To return to the list of search results, click <<**Go Back**.

## Issuing Another Registration Receipt

Sometimes you may wish to email another copy of the registration receipt to the registration owner or to someone else without changing any payment information. For example, use this procedure if a registration owner deleted the original receipt, or to send registration information to one of the registrants. To issue another receipt for a registration, follow these steps:

1. Locate the registration using the steps in [Searching for Registrations](#).
2. Click **View Payments**. The Payment Details page for that registration will be displayed.
1. Click **Issue Receipt**. The registration receipt will be displayed.
2. At the top of the page, enter the email address where the receipt should be sent. (By default, the field contains the address of the registration owner.)
3. Click **Send**. The confirmation receipt will be emailed.
4. To leave the receipt, scroll to the bottom of the page and click **Go Back**. The Payment Details page will be displayed again.

## Adding, Removing, or Modifying a Program Registration

**NOTE:** When you change a program registration, you must complete the entire registration process, including checking out, to ensure that the changes to the registration are saved. You must complete the checkout process even if your changes do not affect the balance.

To change a program registration, follow these steps:

1. Locate the registration using the steps in [Searching for Registrations](#).
2. Display the registration pages:
  - If you searched within Manage Events, click **Edit Registration**. The first registration page will be displayed.
  - If you searched from Event Management, click **View Detail**, and then click **Update** at the bottom of the page. The first registration page will be displayed.
3. Make the desired changes to the registration.
4. When you are finished changing the registrant information, click **Checkout**. The Shopping Cart summary page will be displayed.

- At the bottom of the page, click **Checkout**. The payment page will be displayed.
- If your changes increased the balance due or you wish to apply a payment now, click **Checkout**. The payment page will be displayed. Follow the steps in [Entering Online Payment Information for a New Registration](#) or [Entering Offline Payment Information for a New Registration](#) to apply a payment and an issue a new receipt.

## Viewing Payment Details for a Registration

To view payment details for a registration, follow these steps:

- Locate the registration using the steps in [Searching for Registrations](#).
- Click **View Payments**. The Payment Details page for that registration will be displayed.

*Payment Details for a registration paid for with an offline check.*

Payment Details Registration No. 2830638						
ID	Transaction Date	Posting Date	Type	Details		Amount
2789465	4/1/2014 4:37:26 PM	4/1/2014	Online Purchase	New registration		\$90.00
2789468	4/1/2014 4:43:39 PM	4/1/2014	Offline Check Payment	Offline Check Payment (Check #9845) made through store order 12839 (\$90.00)		
<b>Balance:</b>						<b>\$0.00</b>

## Applying a Payment Without Changing Registrant Information

If you need to apply a payment to a registration but do not need to change any of the registrant information, follow the procedures in this section.

### Applying an Online Payment

To apply an online payment to a registration, follow these steps:

- Locate the registration using the steps in [Searching for Registrations](#).
- Click **View Detail**. The View Details page for that registration will be displayed. If a balance is due, the Make Payment button will be displayed at the bottom of the page.
- Click **Make Payment**. The Shopping Cart summary for the registration will be displayed.
- Click **Checkout**. The payment page for the registration will be displayed.
- Choose the correct payment type, enter the online payment information, and make sure that the correct information is displayed in the Name and Billing Address fields.
- Click **Make Payment**. The payment will be processed and the Adjust Balance page for the registration will be displayed. In most cases, you will not need to adjust the balance because the online payment has already been processed and applied.
- On the Adjust Balance page, click **Done**.

### Applying an Offline Payment

If you're applying an offline payment, you can skip the Shopping Cart and apply the payment by adjusting the balance. To apply an offline payment, follow these steps:

- Locate the registration using the steps in [Searching for Registrations](#).
- Click **View Payments**. The Payment Details page will be displayed.
- Click **Adjust Balance**. The Adjust Balance page will be displayed.
- In the Total Adjustment field, enter the amount of the payment.
- In the Type pop-up menu, select one of the following (the other options in the menu are not appropriate for posting offline payments):
  - Offline Check Payment**
  - Offline Credit Card Payment**
  - Offline Cash Payment**
- By default, the posting date is today's date. To post the payment on another date, enter the date or select it from the calendar in the Posting Date field.

**NOTE:** Be sure to enter the correct posting date. If your event has early registration discounts, late fees, or payment schedules, entering the correct posting date can make a difference in the total balance due.

7. In the Adjustment Description field, enter a description of the adjustment. For example, enter the check number to record a payment by check.
8. At the bottom of the page, locate the line item for the registration. (If the registration was the only item that was purchased in this order, it will be the only line item.)
9. In the Adjustment field at the right of the registration line item, enter the amount of the payment.

**NOTE:** If the purchase contained items other than the registration and the payment should also be applied to one or more other items in the order, enter the amount to apply to each item in the Adjustment field. The sum of the amounts in the line-item Adjustment fields must equal the amount that you entered in the Total Adjustment field. If the amounts are not equal, the Adjust button will be grayed out and you will not be able to complete the adjustment.

10. Click **Adjust**. A confirmation dialog box will be displayed
11. In the dialog box, click **OK**. The Adjust Balance page for the registration will be displayed with the updated payment information.

**NOTE:** Once an adjustment is posted, no changes can be made. If you need to correct an error, you must post an offsetting adjustment.

### ***Sending an Updated Receipt that Reflects the Adjusted Balance***

To send an updated receipt that reflects the adjusted balance, follow these steps on the Adjust Balance page:

1. Click **Issue Receipt**. The updated receipt will be displayed.
2. At the top of the page, enter the email address where the updated receipt should be sent. (By default, the field contains the address of the registration owner.)
3. Click **Send**. The updated receipt will be emailed.
4. To leave the page, scroll to the bottom of the page and click **Done**.

### **Assigning a New Registration Owner (Reassign Purchaser)**

At times, you may need to change the owner of a registration to a different person. For example, if a troop leader registered a group for camp but a new troop leader is now responsible for the group, you'll want to change the registration owner to the new troop leader.

Before you can assign a new registration owner, you must be sure that the new registration owner has a member profile. In Member Management, use Search, Display & Modify Members to make sure that the new registration owner has a profile. If they don't, use the New Member feature to create a member profile for the new registration owner.

To assign a new owner to a registration, follow these steps:

1. Locate the registration using the steps in [Searching for Registrations](#).
2. In the Action column at the right, click **View Detail**. The View Details page for that registration will be displayed.
3. In the Purchased By section, click **Reassign Purchaser**. The Search and Select Owner page will be displayed.
4. In the First Name and/or Last Name fields, enter information to locate the new registration owner's profile.
5. Click **Search**. A list of members matching your search criteria will be displayed.
6. Locate the new registration owner, and click **Select**. The View Details page will be displayed and the new registration owner will be listed as the purchaser.

Please note that this procedure only changes the registration owner and does not change registrant information. If the previous registration owner is registered for the event and the new registration owner will be attending in their place, you must edit the registration itself to remove the old registration owner and add the new registration owner as the registrant.

## Moving a Registration with the Move Registration Tool

The Move Registration tool lets you to move a registration from one event to another. For example, if someone signs up for an August workshop but decides they want to attend the September workshop instead, you can use the Move Registration tool to move the registration to the September event. All registrant information and funds are transferred to the registration for the second event, so you don't have to cancel the first registration, create the second registration, and transfer the funds.

Please note the following important information about moving registrations with the Move Registration tool:

- You can only move registrations between events that are in the same organization.
- If you move a registration from one program session to another session in the same program, selections for session events will be lost. However, because the Move Registration tool takes you through the complete registration process for the second event, you'll have the opportunity to select session events for the second program.

To use the Move Registration tool, follow these steps:

1. In Event Management, click the **Utilities** tab.
2. Click **Move Registration**.
3. In the field, enter the registration number of the registration you want to move.
4. Click **Continue**. A page containing information about the registration and a list of events to which the registration can be moved will be displayed.
5. In the Available Reassignment Events window, select the event to which you want to move the registration.
6. Click **Continue**. The registration process for the selected event will be displayed.
7. Follow the steps to complete the registration process.

# Adjusting a Registration Balance

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You may need to adjust a registration balance without making any changes to the registration information. For example, if a registration owner mails in a payment after registering, you must adjust the balance to show the amount that was paid.

After you adjust a balance, you should send a new receipt to the registration owner that shows the updated balance.

The following topics are covered in this section:

- [Adjusting the Balance](#)
- [Sending a Confirmation Receipt that Reflects the Adjusted Balance](#)

## Understanding Credits and Debits

When you are posting an adjustment, the adjustment is a credit or a debit. Doubleknot offers the following common types of adjustments as options on the Adjust Balance page:

- **Offline Check Payment**—applies a credit
- **Offline Credit Card Payment**—applies a credit
- **Offline Refund**—applies a debit
- **Offline Cash Payment**—applies a credit

When you choose one of those adjustment types, the adjustment is automatically posted as a credit or debit. However, sometimes you will post an adjustment that does not fall into one of those categories. In these cases, you must determine whether the adjustment is a credit or a debit.

A **credit** applies a payment or payment equivalent to the balance on the customer's behalf. If you are manually reducing the amount that a customer owes—for example, if you are applying a scholarship or other manual discount to the balance due—you are applying a credit. When entering this kind of adjustment, select **Misc Credit** from the Type menu.

A **debit** increases the amount that the customer owes you. If you owe a balance to the customer, a debit decreases the amount that you owe the customer. For example, if you're adjusting a balance to reflect that a customer's check was returned by the bank, you'll enter the sum of the returned check and the service fee and select **Misc Debit**. Do not enter the amount as a negative number—when you select **Misc Debit**, the system will automatically increase the amount the customer owes you.

## Adjusting the Balance

To adjust a registration balance, follow these steps:

1. Locate the registration using the steps in [Searching for Registrations](#).
2. In the Action column for the registration, click **View Payments**. The Payment Details page will be displayed.
3. At the bottom of the page, click **Adjust Balance**. The Adjust Balance page will be displayed.
4. In the Total Adjustment field, enter the amount of the adjustment.
5. In the Type: pop-up menu, select one of the following:
  - **Offline Check Payment**
  - **Offline Credit Card Payment**
  - **Offline Refund**
  - **Offline Cash Payment**
  - **Misc Debit**
  - **Misc Credit**
6. By default, the posting date is today's date. To post the payment on another date, enter the date or select it from the calendar in the Posting Date field.

**NOTE:** Be sure to enter the correct posting date. If your event has early registration discounts, late fees, or payment schedules, entering the correct posting date can make a difference in the total balance due.

7. In the Adjustment Description field, enter a description of the adjustment. For example, enter the check number to record a payment by check.
8. At the bottom of the page, locate the line item for the registration. (If the registration was the only item that was purchased in this order, it will be the only line item.)
9. In the Adjustment field at the right of the registration line item, enter the amount of the payment.

**NOTE:** If the purchase contained items other than the registration and the payment should also be applied to one or more other items in the order, enter the amount to apply to each item in the Adjustment field. The sum of the amounts in the line-item Adjustment fields must equal the amount that you entered in the Total Adjustment field. If the amounts are not equal, the Adjust button will be grayed out and you will not be able to complete the adjustment.

10. Click **Adjust**. A confirmation dialog box will be displayed
11. In the dialog box, click **OK**. The transaction history will be updated to reflect the updated payment information.

**NOTE:** Once an adjustment is posted, no changes can be made. If you need to correct an error, you must post an offsetting adjustment.

*Adjusting the balance for a registration to reflect an offline check payment for \$390.*

Adjust Balance						
Transaction History for Order 12958						
Transaction Time	Account	Posting Date	Type	Details	Amount	
4/16/2014 2:18:06 PM	Summer Camps	4/16/2014	Online Purchase	New registration		\$390.00
					<b>Balance</b>	<b>\$390.00</b>
Order 12958						
Total Adjustment: \$ <input type="text" value="390"/>						
Adjustment Type: <input type="text" value="Offline Check Payment"/>						
Posting Date: <input type="text" value="4/16/2014"/>						
Adjustment Description: <input type="text" value="Check #3764"/>						
Item #	Description	Amount	Payments and Adjustments	Balance	Adjustment	
2830831	Summer Daycamp--Session 2	\$390.00	\$0.00	\$390.00	\$	<input type="text" value="390.00"/>
<b>Total</b>		<b>\$390.00</b>	<b>\$0.00</b>	<b>\$390.00</b>		<b>\$390.00</b>
<input type="button" value="Done"/> <input type="button" value="Adjust"/> <input type="button" value="Issue Receipt"/>						

After adjusting the balance, the transaction history shows the updated payment information. The administrator's next step is to issue a receipt showing that the payment was received and applied to the registration.

Adjust Balance						
Transaction History for Order 12958						
Transaction Time	Account	Posting Date	Type	Details	Amount	
4/16/2014 2:18:06 PM	Summer Camps	4/16/2014	Online Purchase	New registration	\$390.00	
4/16/2014 2:19:34 PM	Summer Camps	4/16/2014	Offline Check Payment	Offline Check Payment (Check #3764) made through store order 12958	(\$390.00)	
<b>Balance</b>					<b>\$0.00</b>	
Order 12958						
Total Adjustment: \$ <input type="text"/>						
Adjustment Type: <input type="text" value="Offline Check Payment"/>						
Posting Date: <input type="text" value="4/16/2014"/>						
Adjustment Description: <input type="text"/>						
Item #	Description	Amount	Payments and Adjustments		Balance	Adjustment
2830831	Summer Daycamp--Session 2	\$390.00	(\$390.00)		\$0.00	\$ <input type="text"/>
<b>Total</b>		<b>\$390.00</b>	<b>(\$390.00)</b>		<b>\$0.00</b>	

### Sending an Updated Receipt that Reflects the Adjusted Balance

To send an updated receipt that reflects the adjusted balance, follow these steps on the Adjust Balance page:

1. Click **Issue Receipt**. The updated receipt will be displayed.
2. At the top of the page, enter the email address where the receipt should be sent. (By default, the field contains the address of the registration owner.)
3. Click **Send**. The updated receipt will be emailed.
4. To leave the page, scroll to the bottom of the page and click **Done**.

# Managing Waitlists for Programs

The following topics are covered in this section:

- [About Waitlists](#)
- [Checking the Size of a Session Waitlist](#)
- [Displaying the Manage Waitlist page](#)
- [Moving Registrants Off the Waitlist](#)
- [Viewing a Report of Registrants Automatically Cleared from Waitlists](#)

## About Waitlists

Any session or session event that is configured with named registrants and a maximum number of attendees can also be configured to have a waitlist. If a waitlist is available and the maximum number of people who can be on the waitlist has been reached, people who register after the capacity is reached will be informed that they're registering for the waitlist. If a waitlist is not available, or if the maximum number of people who can be on the waitlist is reached, people who attempt to register will only be informed that the session or session event is full.

More information about waitlist configuration and management is located in the following documents:

- Information about configuring waitlists for program sessions and session events is located in the document *Creating and Editing Programs*.
- Information about how waitlists work is located in the document *Understanding Event Waitlists*.
- Information about global Event Settings that affect waitlists is located in the document *Configuring Global Event Settings*.

## Checking the Size of a Session Waitlist

To see the size of the waitlist for a session, display the Manage a Program page and locate the Total Registrants section. The following information is available:

- **Capacity**—The maximum number of attendees for the session or session event that was configured when the event was created.
- **Registered**—The total number of people registered for the session. If this number is greater than the Capacity, an event administrator has manually moved people off the waitlist, or Event Settings allow administrators to override capacity and an administrator has entered new registrations that bypass the waitlist.
- **Waitlisted**—The number of registrants on the waitlist.
- **Remaining**—The total number of available spaces for the session or session event. If the number displayed is negative, an event administrator manually moved that number of people off the waitlist or entered new registrations that overrode capacity. If this number is negative, cancelling existing registrations will not cause registrants to move off of the waitlist until the number of people who are registered no longer exceeds the capacity.

In the following example, the capacity for the session is set at ten, and ten people are registered. As a result, there are zero remaining spaces. Two people are on the waitlist. If Event Settings are configured so that waitlists are automatically cleared, the first person on the waitlist will be registered for the session if a registrant (or an administrator) cancels their registration.

*Example: Two people are on the waitlist*

Total Registrants				
	Capacity	Registered	Waitlisted	Remaining
General	10	10	2	0
<b>Total</b>	<b>10</b>	<b>10</b>	<b>2</b>	<b>0</b>

In the next example, the capacity of the session is set at ten. However, an administrator has manually moved two people off the waitlist or overrode the capacity by registering two people who bypassed the waitlist. As a result, the number of people registered for the session is twelve, and the Remaining column contains a negative number because the administrator overrode the capacity by two. Three registrants are on the waitlist. Even if Event Settings are configured to automatically clear the waitlist, no one will automatically move off the waitlist until the number in the Remaining column returns to zero. If two registrants are deleted, the Registered column will show ten and the Remaining column will show zero. If another registrant cancels, the first person on the waitlist will automatically be registered (if Event Settings are configured to automatically clear the waitlist).

*Example: The event administrator overrode the capacity settings, so there are -2 remaining spaces.*

Total Registrants				
	Capacity	Registered	Waitlisted	Remaining
General	10	12	3	-2
<b>Total</b>	<b>10</b>	<b>12</b>	<b>3</b>	<b>-2</b>

### Displaying the Manage Waitlist Page

Waitlists for sessions and session events are managed at the Manage Waitlist page. To display the Manage Waitlist page, follow these steps:

To view the waitlists associated with a session, follow these steps:

- Depending on your location in Event Management, perform one of the following:
  - At the Manage a Program Session page, click **Waitlist**. The Manage Waitlist page will be displayed.
  - At the Manage Registrations page for the session, click **View Waitlist**. The Manage Waitlist page will be displayed.
- By default, the page will display information about the waitlist for the overall session.

**NOTE:** Waitlist information for the session will always be displayed by default. If there is not a waitlist for the session, you'll see a message that there aren't any registrants on the waitlist. However, the menu will contain the names of session events that have waitlists.

*Manage Waitlist page for a session that doesn't have a waitlist.  
The menu contains the session events that have waitlists.*

Manage Waitlist				
No waitlisted registrants for this event.				
<div style="border: 1px solid black; padding: 2px;">                     2014 Nonprofit Fundamentals Conference (02/27/2014 - 02/28/2014)                 </div> <div style="border: 1px solid black; padding: 2px;">                     2014 Nonprofit Fundamentals Conference (02/27/2014 - 02/28/2014)                 </div> <div style="border: 1px solid black; padding: 2px;">                     Board Development (Feb 28 2014 1:00PM - Feb 28 2014 3:30PM)                 </div>				
Name	Date Added		Owner	
				1

*Manage Waitlist page for the session event*

Manage Waitlist				
<div style="border: 1px solid black; padding: 2px; display: inline-block;">                         Board Development (Feb 28 2014 1:00PM - Feb 28 2014 3:30PM)                     </div>				
Name	Date Added	Group	Waitlisted	Registration Owner
Spongebob Squarepants	10/22/2013 11:06:58 AM	2828989	<a href="#">Clear WaitListed</a>	Squarepants, Spongebob
Squidward Squidoo	10/22/2013 11:07:05 AM	2828989	<a href="#">Clear WaitListed</a>	Squarepants, Spongebob
Patrick Starfish	10/22/2013 11:07:09 AM	2828989	<a href="#">Clear WaitListed</a>	Squarepants, Spongebob

### Moving Registrants Off the Waitlist

Sometimes you might want to manually move a registrant off of the waitlist. For example, if a board member or other VIP registered for a waitlisted session or session event, you might want to ensure that the VIP can attend the event even if it exceeds capacity settings.

**NOTE:** If Event Settings are configured so that waitlists are not automatically cleared, this procedure is the only way to move registrants off the waitlist. For more information, see the document Configuring Global Event Settings.

To manually move a registrant off the waitlist, follow these steps:

1. Display the Manage Waitlist page for the session or session event.
2. In the menu, select the waitlist you want to manage. The page will be redisplayed with information about the selected waitlist.
3. Find the registrant you want to move off the waitlist.
4. In the Waitlisted column, click **Clear Waitlisted**. The registrant will move off the waitlist and be registered for the session or session event.

### Viewing a Report of Registrants Automatically Cleared from Waitlists

To view a report of registrants who automatically cleared from session and session event waitlists, follow these steps:

1. Display the Manage Events page for the session.
2. At the left, click **Reports**. The Report Selections page will be displayed.
3. Click **Waitlists Automatically Cleared**. The Waitlists Automatically Cleared Report will be displayed.
4. The following options are available:
  - To display more or fewer records on the page, choose the desired amount from the Rows to Display Per Page menu.
  - To display records by date range, choose the desired range from the Range pop-up menu and click **Go**. Or, to specify the beginning and end dates for the range of records, enter or select the dates in the calendar fields, and click **Go**.
  - To download the data as a Microsoft Excel file (.xls) file, click **Download Data as File**.
  - To display the report in a format suitable for printing, click **Printable Version**. The printable report will be displayed in a new browser tab.
  - To download the data as a PDF, click **PDF Version**.
5. To leave the report, click **Done** at the bottom of the page.

*The Waitlists Automatically Cleared report shows registrants who automatically moved off the waitlist for the session and/or session events. In this example, Spongebob Squarepants moved off the waitlist for the session event Board Development, and the others moved off the waitlist for the session 2014 Nonprofit Fundamentals Conference.*

Waitlists Automatically Cleared Report				
Rows to display per page: 50				
Range: Choose one... Or: 10/21/2013 To: 10/23/2013 Go				
<a href="#">Download Data as File</a> <a href="#">Printable Version</a> <a href="#">PDF Version</a>				
<< First   < Prev   Page 1 of 1   Next >   Last >>				
Registration Key	Date Processed	Registration Owner	Cleared Registrant	Event Cleared
2828989	Oct 23 2013 12:40PM	Squarepants, Spongebob	Squarepants, Spongebob	Board Development
2828997	Oct 23 2013 1:10PM	Franklin, Benjamin	Franklin, Benjamin	2014 Nonprofit Fundamentals Conference
2828997	Oct 23 2013 1:10PM	Franklin, Benjamin	Washington, George	2014 Nonprofit Fundamentals Conference
2829000	Oct 23 2013 1:10PM	Franklin, Benjamin	Jefferson, Thomas	2014 Nonprofit Fundamentals Conference
2829000	Oct 23 2013 1:10PM	Franklin, Benjamin	Hancock, John	2014 Nonprofit Fundamentals Conference
2829000	Oct 23 2013 1:40PM	Franklin, Benjamin	Hamilton, Alexander	2014 Nonprofit Fundamentals Conference
2829003	Oct 23 2013 1:40PM	Pig, Porky	Pig, Porky	2014 Nonprofit Fundamentals Conference

# Cancelling Program Registrations and Issuing Refunds

The following topics are covered in this section:

- [Cancelling Program Registrations: Overview](#)
- [Do I Need to Issue a Refund?](#)
- [Cancelling a Program Registration with Online Payment](#)
- [Cancelling a Program Registration With Offline Payment](#)
- [Cancelling Registrations that the Customer Hasn't Paid For](#)
- [Issuing a Receipt that Reflects the Cancellation](#)

## Cancelling Program Registrations: Overview

When you cancel a registration, you are deleting the registrants from the list of attendees for the program. All payment information still exists in the records for that registration. You can continue to view and modify financial information for a deleted registration.

The main tasks in cancelling a registration are:

- Issue a refund (if necessary), which should be performed before you delete the registration. The section [Do I Need to Issue a Refund?](#) contains information to help you determine if you need to issue a refund.
- Delete the registration.
- If needed, adjust the balance due to account for offline refunds or for partial refunds of any kind.
- Issue a new receipt to the customer.

## Do I Need to Issue a Refund?

The Payment Details page for a registration contains information about all the financial transactions associated with the registration. Review the Payment Details page to determine what kind of refund should be made (if any) and the amount of money to refund. To display the Payment Details page, follow these steps:

1. Locate the registration using the steps in [Searching for Program Registrations](#).
2. In the Action column at the right, click **View Payments**. The Payment Details page will be displayed.

## Example: Online Payment Made

In this example, the Payment Details page shows that the registration you want to cancel was paid for with an online credit card payment of \$40.

*Payment Details for a registration paid for online with a credit card.*

Payment Details Registration No. 988355						
ID	Transaction Date	Posting Date	Type	Details		Amount
959688	7/25/2013 12:28:44 PM	7/25/2013	Online Purchase	New registration		\$40.00
959690	7/25/2013 12:28:44 PM	7/25/2013	Charge	Payment made through store order 7919		<del>(\$40.00)</del>
<b>Balance:</b>						<b>\$0.00</b>

To cancel this registration, you would:

- Issue an online refund.
- If you issued a full online refund, delete the registration (the balance is automatically adjusted to reflect the online refund).
- If you issued a partial online refund, use the Adjust Balance and Delete feature to account for the portion of the fee that you did not refund.
- Send an updated receipt to the registration owner.

### Example: Offline Payment Made

In this example, the Payment Details page shows that the registration you want to cancel was paid for with an offline check for \$40.

*Payment Details for a registration paid for with an offline check.*

Payment Details Registration No. 988281						
ID	Transaction Date	Posting Date	Type	Details	Amount	
959668	7/22/2013 11:04:28 AM	7/22/2013	Online Purchase	New registration	\$40.00	
959669	7/22/2013 11:04:47 AM	7/22/2013	Offline Check Payment	check 4231	(\$40.00)	
					<b>Balance:</b>	<b>\$0.00</b>

To cancel this registration, you would:

- Issue an offline refund.
- Use the Adjust Balance and Delete feature to adjust the balance to reflect the offline refund and delete the registration.
- If you made a partial offline refund, adjust the balance again to account for the portion of the registration fee that you did not refund.
- Send an updated receipt to the registration owner.

### Example: No Payment Made

In this example, the Payment Details page shows that no payment was made for the registration you want to cancel, and the balance due is \$60.

*Payment Details for a registration that has a balance due.*

Payment Details Registration No. 988283						
ID	Transaction Date	Posting Date	Type	Details	Amount	
959671	7/22/2013 11:31:40 AM	7/22/2013	Online Purchase	New registration	\$60.00	
					<b>Balance:</b>	<b>\$60.00</b>

To cancel this registration, you would:

- Delete the registration (because no payment was made, there are no payments to refund).
- Send an updated receipt to the registration owner.

### Canceling a Program Registration with Online Payment

The general steps to cancel a registration with online payment are:

- Issue an online refund.
- If you issued a full online refund, delete the registration (the balance is automatically adjusted to reflect the online refund).
- If you issued a partial online refund, use the Adjust Balance and Delete feature to adjust the balance to account for the funds that you did not return.
- Send an updated receipt to the registration owner.

### Issuing an Online Refund

This section contains instructions for refunding online payments.

#### Beginning the Online Refund Process

To begin refunding an online payment, follow these steps:

1. Locate the registration using the steps in [Searching for Registrations](#).
2. In the Action column at the right, click **View Payments**. The Payment Details page will be displayed.
3. Locate the line item for the online payment you wish to refund.
4. Click the underlined amount. The Transaction Detail page for that transaction will be displayed.

- At the bottom of the Transaction Detail page, click **Issue Credit**. The Issue a Credit page will be displayed. Follow the steps in the next two sections to complete the information on this page.

*Issue a Credit page for issuing online refunds.*

**Issue a Credit**

**Organization Account:** San Jose Zoo Development

**Payment Description:** Order Number 12960

**Cost to process credit:** \$0.30

**Original Payment Amount:** \$390.00

**Less Previous Issued Credits:** \$0.00

**Available to Credit:** \$390.00

**Payer to credit:** Katherine Hepburn

**Payer's Account:** American Express 3782XXXXXXXX0005 Exp. Date:12/2015

**Amount to Credit:**

**Reason for Credit:**

Transactions to Credit:		Account	Item #	Description	Original Amount	Credit Amount
Summer Camps	2830833			Summer Daycamp--Session 2 (06/30/2014)	\$390.00	<input type="text" value="\$ 390"/>

**By clicking in the check box to the left you authorize Doubleknot, Inc. to process the credit.**

### Entering Refund Information

To enter information about the refund, follow these steps at the Issue a Credit Page:

- In the Amount to Credit field, enter the total amount of the refund. This amount cannot exceed the amount displayed in Available to Credit section.
- In the Reason for Credit field, enter the reason for the refund.
- In the Transactions to Credit section, locate the transaction for which you're creating the refund. In the example illustration above, there is only one transaction in the order.
  - If you are refunding only one registration (or if only one registration is displayed), enter the amount of the refund in the Credit Amount field.
  - If you are refunding more than one registration, enter the amount to be refunded for each registration in the Credit Amount field for each item.

**NOTE:** The total amount that you enter in the Credit Amount column must be equal to the number you entered in the Amount to Credit field.

### Completing the Refund

To complete the refund, follow these steps:

- Click the box for **By clicking in the check box to the left, you authorize Doubleknot, Inc. to process the credit.** (The exact text depends on your merchant services provider.)
- At the bottom of the screen, click **Credit**. The Credit Confirmation page will be displayed.
- Click **Done**. The Transaction Details page will be displayed.
- Click **Done**. Financial account information will be displayed.
- At the top of the page, click **Feature List** to return to the main Doubleknot page.
  - If you issued a full refund, follow the steps in [Full Online Refund: Deleting the Registration](#).
  - If you issued a partial refund, follow the steps in [Partial Online Refund: Adjusting the Balance and Deleting the Registration](#).

### ***Full Online Refund: Deleting the Registration***

To delete a registration for which you've issued a full online refund, follow these steps after you issue the refund:

1. Locate the registration using the steps in [Searching for Registrations](#).
2. In the Action column, click **Delete Registration**. The Delete Warning page will be displayed.
3. Click **Delete**. A confirmation dialog will be displayed.
4. Click **OK**. The registration will be deleted, the balance for the registration will be adjusted to \$0.00, and the only available items in the Action column will be View Detail and View Payments.
5. Follow the steps in [Issuing a Receipt that Reflects the Cancellation](#).

### ***Partial Online Refund: Adjusting the Balance and Deleting the Registration***

When you delete a registration for which you've issued a partial online refund, you must adjust the balance with a Misc Debit for the amount you didn't refund so your organization doesn't appear to owe the customer money. To adjust the balance and delete a registration for which you've issued a partial online refund, follow these steps:

1. Locate the registration using the steps in [Searching for Registrations](#).
2. In the Action column, click **Delete Registration**. The Delete Warning page will be displayed.
3. Click **Adjust Balance and Delete**. The Adjust Balance page will be displayed.
4. In the Total Adjustment field, enter the amount of the cancellation fee.
5. In the Type menu, select **Misc Debit**.
6. In the Posting Date field, enter the posting date for the cancellation of the registration.
7. In the Adjustment Description field, enter a description of the adjustment (for example, "Cancellation fee retained per event cancellation policy.")
8. In the Adjustment field for the registration, enter the amount of the cancellation fee. This should be the same number that you entered in the Total Adjustment field.
9. Click **Adjust and Delete**. A confirmation dialog box will be displayed.
10. Click **OK**. The adjustment will be applied, and the registration will be deleted.
11. Follow the steps in [Issuing a Receipt that Reflects the Cancellation](#).

After clicking Adjust Balance and Delete, the Adjust Balance page shows the partial online refund. The administrator enters the amount that was not refunded as a Misc Debit (in this example, \$50). After clicking Adjust and Delete, the balance will be \$0.00 and the registration will be deleted.

Adjust Balance						
Transaction History for Order 13027						
Transaction Time	Account	Posting Date	Type	Details	Amount	
4/24/2014 5:27:26 PM	Summer Camps	4/24/2014	Online Purchase	New registration	\$360.00	
4/24/2014 5:27:26 PM	Summer Camps	4/24/2014	Charge	Payment made through store order 13027	(\$360.00)	
4/25/2014 12:08:46 PM	Summer Camps	4/25/2014	Credit	Credit issued through store order 13027	\$310.00	
<b>Balance</b>					<b>\$310.00</b>	

Order 13027						
Total Adjustment: \$ <input type="text" value="50"/>						
Adjustment Type: <input type="text" value="Misc Debit"/>						
Posting Date: <input type="text" value="4/25/2014"/>						
Adjustment Description: <input type="text" value="Cancellation fee per policy"/>						

Item #	Description	Amount	Payments and Adjustments	Balance	Adjustment
2830904	Summer Daycamp--Session 4	\$360.00	(\$50.00)	\$310.00	\$ <input type="text" value="50.00"/>
<b>Total</b>		<b>\$360.00</b>	<b>(\$50.00)</b>	<b>\$310.00</b>	<b>\$50.00</b>

After adjusting the balance with a Misc Debit for the cancellation fee, the Payment Details shows the refund, the cancellation, and the amount retained as a cancellation fee. The final balance for the deleted registration is \$0.

Payment Details Registration No. 2830904						
ID	Transaction Date	Posting Date	Type	Details	Amount	
2790557	4/24/2014 5:27:27 PM	4/24/2014	Online Purchase	New registration	\$360.00	
2790559	4/24/2014 5:27:27 PM	4/24/2014	Charge	Payment made through store order 13027	(\$360.00)	
2790570	4/25/2014 12:08:47 PM	4/25/2014	Credit	Credit issued through store order 13027	\$310.00	
2790573	4/25/2014 12:10:58 PM	4/25/2014	Misc Debit	Misc Debit (Cancellation fee per policy) made through store order 13027	\$50.00	
2790574	4/25/2014 12:10:58 PM	4/25/2014	Online Purchase	Deleted registration	(\$360.00)	
<b>Balance:</b>					<b>\$0.00</b>	

## Cancelling a Program Registration With Offline Payment

When you cancel a registration with offline payment, you will:

- Follow your organization's procedures to issue an offline refund.
- Use the Adjust Balance and Delete feature to adjust the balance to account for the offline refund and delete the registration.
- If you issued a partial offline refund, you will adjust the balance of the deleted registration again to account for the funds that your organization did not return.
- Send an updated receipt to the registration owner.

### Adjusting the Balance and Deleting the Registration

To adjust the balance and delete a reservation that was paid for with an offline method, follow these steps after you issue the offline refund:

1. Locate the registration you wish to delete using the steps in [Searching for Registrations](#).
2. In the Action Column at the right, click **Delete Registration**. The Delete Warning page will be displayed.

3. Click **Adjust Balance and Delete**. The Adjust Balance page will be displayed.
4. In the Amount field, enter the amount of the refund.
5. In the Adjustment Type menu, select **Offline Refund**.
6. In the Adjustment Description field, enter a description of the refund.
7. Click **Adjust and Delete**. A confirmation dialog box will be displayed.
8. Click **OK**. The registration will be deleted, and the page where you looked up the reservation will be displayed. The only items in the Action column will be View Detail and View Payments.
9. Choose one of the following:
  - If you issued a partial online refund, follow the steps in [Adjusting the Balance for a Partial Offline Refund](#).
  - If you issued a full online refund, follow the steps in [Issuing a Receipt that Reflects the Cancellation](#).

*The Adjust Balance page is completed to adjust the balance and delete a registration paid for with an offline check. In this example, the customer received an offline refund for the full amount.*

Adjust Balance						
Transaction History for Order 13029						
Transaction Time	Account	Posting Date	Type	Details	Amount	
4/24/2014 5:30:17 PM	Summer Camps	4/24/2014	Online Purchase	New registration	\$360.00	
4/24/2014 5:30:38 PM	Summer Camps	4/24/2014	Offline Check Payment	Offline Check Payment (Check #9072) made through store order 13029	(\$360.00)	
					<b>Balance</b>	<b>\$0.00</b>

Order 13029	
Total Adjustment:	\$ 360
Adjustment Type:	Offline Refund
Posting Date:	4/25/2014
Adjustment Description:	Full refund per cancellation policy

Item #	Description	Amount	Payments and Adjustments	Balance	Adjustment
2830906	Summer Daycamp--Session 4	\$360.00	(\$360.00)	\$0.00	\$ 360.00
<b>Total</b>		<b>\$360.00</b>	<b>(\$360.00)</b>	<b>\$0.00</b>	<b>\$360.00</b>

*After the balance is adjusted for the full refund and the reservation is deleted, the Payment Details page shows a balance of \$0.*

Payment Details Registration No. 2830906						
ID	Transaction Date	Posting Date	Type	Details	Amount	
2790564	4/24/2014 5:30:18 PM	4/24/2014	Online Purchase	New registration	\$360.00	
2790567	4/24/2014 5:30:39 PM	4/24/2014	Offline Check Payment	Offline Check Payment (Check #9072) made through store order 13029	(\$360.00)	
2790577	4/25/2014 12:14:17 PM	4/25/2014	Offline Refund	Offline Refund (Full refund per cancellation policy) made through store order 13029	\$360.00	
2790578	4/25/2014 12:14:17 PM	4/25/2014	Online Purchase	Deleted registration	(\$360.00)	
					<b>Balance:</b>	<b>\$0.00</b>

### **Adjusting the Balance for a Partial Offline Refund**

If you issued a partial refund for the cancelled reservation, the Payment Details will show that you owe the amount your organization retained to the customer. You must adjust the balance with a Misc Debit to show that your organization does not owe the money to the customer.

Payment Details show that the organization owes \$50 to the customer for the deleted registration. Because the organization is keeping the \$50 as a cancellation fee, the administrator must adjust the balance to show that the organization doesn't owe the money to the customer.

Payment Details Registration No. 2830905					
ID	Transaction Date	Posting Date	Type	Details	Amount
2790560	4/24/2014 5:28:28 PM	4/24/2014	Online Purchase	New registration	\$360.00
2790563	4/24/2014 5:28:55 PM	4/24/2014	Offline Check Payment	Offline Check Payment (Check #7943) made through store order 13028	(\$360.00)
2790581	4/25/2014 12:16:10 PM	4/25/2014	Offline Refund	Offline Refund (Partial refund per cancellation policy) made through store order 13028	\$310.00
2790582	4/25/2014 12:16:10 PM	4/25/2014	Online Purchase	Deleted registration	(\$360.00)
					<b>Balance: (\$50.00)</b>

To adjust the balance for a partial offline refund, follow these steps:

1. Locate the deleted registration.
2. In the Action column at the right, click **View Payments**. The Payment Details page will be displayed.
3. Click **Adjust Balance**. The Adjust Balance page will be displayed.
4. In the Total Adjustment field, enter the amount that your organization did not refund.
5. In the Adjustment Type menu, select **Misc Debit**.
6. In the Adjustment Description field, enter a description such as "Cancellation fee."
7. Click **Adjust**. A confirmation dialog box will be displayed.
8. Click **OK**. The transaction history at the top of the page will be updated with the adjusted balance.
9. To leave the page, click **Done**.

Adjusting the balance with a Misc Debit to show that the organization does not owe the \$50 cancellation fee for the cancelled registration to the customer.

**Adjust Balance**

**Transaction History for Order 13028**

Transaction Time	Account	Posting Date	Type	Details	Amount
4/24/2014 5:28:27 PM	Summer Camps	4/24/2014	Online Purchase	New registration	\$360.00
4/24/2014 5:28:55 PM	Summer Camps	4/24/2014	Offline Check Payment	Offline Check Payment (Check #7943) made through store order 13028	(\$360.00)
4/25/2014 12:16:09 PM	Summer Camps	4/25/2014	Offline Refund	Offline Refund (Partial refund per cancellation policy) made through store order 13028	\$310.00
4/25/2014 12:16:09 PM	Summer Camps	4/25/2014	Online Purchase	Deleted registration	(\$360.00)
<b>Balance</b>					<b>(\$50.00)</b>

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**Order 13028**

Total Adjustment: \$

Adjustment Type:

Posting Date:

Adjustment Description:

Item #	Description	Amount	Payments and Adjustments	Balance	Adjustment
2830905	Summer Daycamp--Session 4	\$0.00	(\$50.00)	(\$50.00)	\$ 50.00
<b>Total</b>		<b>\$0.00</b>	<b>(\$50.00)</b>	<b>(\$50.00)</b>	<b>\$50.00</b>

After adjusting the balance with a Misc Debit for the cancellation fee, the transaction history for the cancelled registration shows that the balance is \$0.00.

Transaction History for Order 13028						
Transaction Time	Account	Posting Date	Type	Details	Amount	
4/24/2014 5:28:27 PM	Summer Camps	4/24/2014	Online Purchase	New registration	\$360.00	
4/24/2014 5:28:55 PM	Summer Camps	4/24/2014	Offline Check Payment	Offline Check Payment (Check #7943) made through store order 13028	(\$360.00)	
4/25/2014 12:16:09 PM	Summer Camps	4/25/2014	Offline Refund	Offline Refund (Partial refund per cancellation policy) made through store order 13028	\$310.00	
4/25/2014 12:16:09 PM	Summer Camps	4/25/2014	Online Purchase	Deleted registration	(\$360.00)	
4/25/2014 12:18:03 PM	Summer Camps	4/25/2014	Misc Debit	Misc Debit (Cancellation fee) made through store order 13028	\$50.00	
				<b>Balance</b>	<b>\$0.00</b>	

## Cancelling Program Registrations that the Customer Hasn't Paid For

If a customer made a registration without paying and wishes to cancel the registration, you can delete the registration without issuing refunds or adjusting the balance. For example, if a customer makes a registration and chooses offline payment but decides to cancel the registration before paying, you can delete the registration and the balance due will automatically adjust to \$0.00. To cancel a registration that a customer hasn't paid for, follow these steps:

1. Locate the registration you wish to delete using the steps in [Searching for Registrations](#).
2. In the Action Column at the right, click **Delete Registration**. The Delete Warning page will be displayed.
3. Click **Delete**. A confirmation dialog box will be displayed.
4. Click **OK**. The reservation will be deleted and the Payment Details for the reservation will show a balance due of \$0.00.

*After deleting a reservation that a customer hadn't paid for, the balance is automatically adjusted to \$0.00.*

Payment Details Registration No. 2830979						
ID	Transaction Date	Posting Date	Type	Details		Amount
2790740	5/6/2014 12:54:27 PM	5/6/2014	Online Purchase	New registration		\$390.00
2790741	5/6/2014 12:55:19 PM	5/6/2014	Online Purchase	Deleted registration		(\$390.00)
<b>Balance:</b>						<b>\$0.00</b>

## Issuing a Receipt that Reflects the Cancellation

To issue a receipt to the customer that reflects the cancelled registration and all refunds and debits, follow these steps:

1. Locate the cancelled registration using the steps in Searching for Program Registrations.
2. In the Action Column, click **View Payments**. The Payment Details page will be displayed. Because you issued a refund and deleted the registration, the Balance should be \$0.00.
3. Click **Issue Receipt**. The receipt will be displayed.
4. At the top of the page, enter the email address where the receipt should be sent. (By default, the field contains the address of the registration owner.)
5. Click **Send**. The receipt will be emailed.
6. To leave the receipt, scroll to the bottom of the page and click **Done**.

# Transferring Funds From One Registration to Another

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In some circumstances, you may need to move funds from one registration to another. For example, a customer may wish to move a single registrant to another registration, or you may need to transfer a registration that can't be moved with the Move Registration tool.

The general steps to transfer funds from one registration to another are the following:

- Make the necessary changes to the first registration such as deleting the registration or removing a registrant.
- Adjust the balance of the first registration to show that the funds are no longer applied to that event. If you're deleting the registration, you'll use the Adjust and Delete feature. If you're modifying the registration, you'll follow the steps to edit the registration and adjust the balance at the end of the registration process.
- Create or modify the second registration, such as adding a registrant or entering a new registration for a different event or program sessions.
- Adjust the balance of the second registration to transfer the fees to the second registration.

## Modifying the First Registration and Adjusting the Balance

Follow this procedure to modify the first registration and adjust the balance.

1. Modify or delete the registration, and display the Adjust Balance page:
  - If you're changing a registration, locate the registration, make the changes, and save the changes to the registration on the payment page to display the Adjust Balance page.
  - If you're deleting a registration, locate the registration and click **Delete**. Then, click **Adjust and Delete** to display the Adjust Balance page.
2. In the Total Adjustment field, enter amount of the registration fee to be transferred. .
3. In the Adjustment Type menu, select **Offline Refund**.
4. In the Adjustment Description field, enter the reason for the adjustment.
5. At the bottom of the page, click **Adjust**. A confirmation dialog box will be displayed.
6. Click **OK**. The balance will be adjusted and the Transaction History will be updated.
7. To leave the page, click **Done**.

In the following example, John Doe and Mary Doe are registered for the first session of day camp, and Mary Doe is registered for the second session of day camp. The parent wants to transfer John Doe's registration to the second session of day camp. First, you will remove John Doe from the Session #1 registration and adjust the balance as an offline refund to show that your organization doesn't owe funds to the customer even though you removed a registrant.

The first step in transferring funds to a different registration is adjusting the balance of the modified or deleted registration to show that the organization doesn't owe a refund. In this example, we've removed a registrant, so we appear to owe the customer \$175. We will mark the \$175 registration fee for the removed registrant as an offline refund so the organization doesn't appear to owe the customer money.

Adjust Balance						
Transaction History for Order 13314						
Item #	Transaction Time	Account	Posting Date	Type	Details	Amount
2831499	7/3/2014 12:59:59 PM	General	7/3/2014	Online Purchase	New registration	\$350.00
2831499	7/3/2014 12:59:59 PM	General	7/3/2014	Charge	Payment made through store order 13312	(\$350.00)
2831499	7/3/2014 1:07:31 PM	General	7/3/2014	Online Purchase	Updated registration	(\$175.00)
<b>Balance</b>						<b>(\$175.00)</b>

Order 13314					
Total Adjustment: \$ <input type="text" value="175"/>					
Adjustment Type: <input type="text" value="Offline Refund"/>					
Posting Date: <input type="text" value="7/3/2014"/>					
Adjustment Description: <input type="text" value="Registrant John Doe attending Session #2 instead"/>					

Item #	Description	Amount	Payments and Adjustments	Balance	Adjustment
2831499	Session #1	\$175.00	(\$350.00)	(\$175.00)	\$ 175.00
<b>Total</b>		<b>\$175.00</b>	<b>(\$350.00)</b>	<b>(\$175.00)</b>	<b>\$175.00</b>

### Adding the Funds to the Second Registration

After you've modified or deleted the first registration and adjusted the balance for the funds to be transferred, follow these steps to apply the funds to the second registration.

1. Create or edit the second registration.
2. Display the Adjust Balance page:
  - If you created a new registration or modified an existing registration, click **Save** on the payment page.
  - If the registration already exists with the correct information and you only need to apply the payment, locate the registration and click **View Payments**. Then, click **Adjust Balance**.
3. In the Total Adjustment field, enter the amount of the funds that you're transferring.
4. In the Adjustment Type menu, select **Offline Payment**.
5. In the Adjustment Description field, enter the reason for the adjustment.
6. At the bottom of the page, click **Adjust**. A confirmation dialog box will be displayed.
7. Click **OK**. The balance will be adjusted and the Transaction History will be updated.
8. To leave the page, click **Done**.
9. To issue a receipt to the registration owner that shows the funds were applied to this registration, click **Issue Receipt**.

As we continue the example, we will add registrant John Doe to the second registration. Because we haven't transferred the funds to the second registration, the Shopping Cart shows that John Doe's \$175 registration is owed.

After adding registrant John Doe to the registration for Session #2, the customer appears to owe the organization the \$175 registration fee.

Shopping Cart		
Description	Amount	Payment
Session #2 6/22/2015	\$350.00	\$175.00
John Doe	\$175.00	
Mary Doe	\$175.00	
Previous Payments and Adjustments	(\$175.00)	
<b>Subtotal</b>	<b>\$175.00</b>	<b>-\$175.00</b>

After saving the changes to the registration, we will adjust the balance with an offline payment of \$175 to apply the funds from the first registration to this one.

Adjust Balance						
Transaction History for Order 13316						
Item #	Transaction Time	Account	Posting Date	Type	Details	Amount
2831500	7/3/2014 1:01:06 PM	General	7/3/2014	Online Purchase	New registration	\$175.00
2831500	7/3/2014 1:01:06 PM	General	7/3/2014	Charge	Payment made through store order 13313	(\$175.00)
2831500	7/3/2014 1:23:24 PM	General	7/3/2014	Online Purchase	Updated registration	\$175.00
<b>Balance</b>						<b>\$175.00</b>

Order 13316						
Total Adjustment: \$ <input type="text" value="175"/>						
Adjustment Type: <input type="text" value="Offline Cash Payment"/>						
Posting Date: <input type="text" value="7/3/2014"/>						
Adjustment Description: <input type="text" value="Funds transfer from Session #1 registration 2831499--moved registrant to #2"/>						

Item #	Description	Amount	Payments and Adjustments	Balance	Adjustment
2831500	Session #2	\$350.00	(\$175.00)	\$175.00	\$ <input type="text" value="175.00"/>
<b>Total</b>		<b>\$350.00</b>	<b>(\$175.00)</b>	<b>\$175.00</b>	<b>\$175.00</b>

After adjusting the balance, the transaction history shows that the funds are correctly applied to the second registration.

Transaction History for Order 13316						
Item #	Transaction Time	Account	Posting Date	Type	Details	Amount
2831500	7/3/2014 1:01:06 PM	General	7/3/2014	Online Purchase	New registration	\$175.00
2831500	7/3/2014 1:01:06 PM	General	7/3/2014	Charge	Payment made through store order 13313	(\$175.00)
2831500	7/3/2014 1:23:24 PM	General	7/3/2014	Online Purchase	Updated registration	\$175.00
2831500	7/3/2014 1:25:55 PM	General	7/3/2014	Offline Cash Payment	Offline Cash Payment (Funds transfer from Session #1 registration 2831499--moved registrant to #2) made through store order 13316	(\$175.00)
<b>Balance</b>						<b>\$0.00</b>

# Viewing, Exporting, and Emailing Registration Information

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Doubleknot offers comprehensive tools to view registration data. You can view a summary of all active registrations; save the report in a format that can be opened in any spreadsheet; and print the report.

The following topics are covered in this section:

- [Viewing and Downloading a Summary of Registration Information](#)
- [Emailing a Summary of Registration Information](#)

Additional information about ways to view registration data is located in [Viewing Program Reports](#).

## Viewing and Downloading a Summary of Registration Information

**NOTE:** If your session has a large number of registrations, or your registration form is complex, it may take several minutes to display the registration information. During this time, you will not be able to perform any other tasks in Doubleknot. To avoid this issue, follow the steps in [Emailing a Summary of Registration Information](#) for program sessions that are large or have complex registration forms.

To view and download registration information, follow these steps:

1. At the Manage a Program Session page, click **Export**. The View & Export page containing registration information for each registrant will be displayed. If your program contains session events, information about session event registration will be included in the report as well.
2. To view only records that meet specific criteria, follow these steps:
  - From the Filter pop-up menu, select the criteria that you want to view.
  - In the field to the right, enter the search term for the criteria you selected. For example, if you chose to filter on the registration owner's last name, enter the registration owner's last name.
3. To display more or fewer records on the page, choose the desired amount from the Rows to Display Per Page menu.
4. To display records by date range, choose the desired range from the Range pop-up menu and click **Go**. Or, to specify the beginning and end dates for the range of records, enter or select the dates in the calendar fields, and click **Go**.
5. To download the data as a comma-separated values (CSV) file that can be opened in any spreadsheet, click **Download Data as File**.
6. To display the information in a format suitable for printing, click **Printable Version**. The printable report will be displayed in a new browser tab.
7. To leave the page, click **Done**.

## Emailing a Summary of Registration Information

If the event has a large number of registrations or a complex registration form, it may take several minutes to display the information on a web page. To avoid waiting, you can request that the registration information be emailed as a link to a spreadsheet file.

## Exporting and Emailing Registration Information

To email a link to a file containing the registration information, follow these steps:

1. At the Manage a Program Session page, click **Email Export**. The Email Export page will be displayed.
2. If you want the report to contain only registrations entered within a specific date range, select the range from the Range pop-up menu, or enter a specific date range in the date field.
3. By default, the email address associated with your logon will be displayed. To send the report to someone else, enter their address in the email address field.
4. Click **OK**. When the export is complete, an email with a link to download the file will be emailed to the address you entered.

### *Requesting an export of registration information to be sent by email*

**Email Export**

You have requested a export for the following:

2014 Nonprofit Fundamentals Conference

Range:  Or:  To:

After clicking the **OK** button below the export will be prepared and sent to  as a comma delimited text file.

### **Checking the Status of an Export**

If you emailed the file to yourself, you'll know when the export is finished because the email will arrive. If you want to check the status of the export or confirm that the completed export was mailed to another person, follow these steps:

1. In Event Management, click the **Utilities** tab.
2. Click **Event Export Status**. The Email Export page will be displayed, and will list any email exports that are not yet complete.
3. Click **Refresh** to view updated information, or click **Done** to leave the page.

# Managing Attendance at Session Events

Attendance at sessions is recorded by checking attendees in to the event. Attendance at specific session events is recorded in the attendance section for the session event.

The following topics are covered in this section:

- [Viewing and Printing a Roster](#)
- [Recording Attendance](#)

## Viewing and Printing a Roster

To view a roster of people who are registered for the session event, follow these steps:

1. At the Manage a Program Session page, click the name of the session event or the attendance icon. The Attendance page containing a list of all the registrants for the session event will be displayed.
2. Click **the Report** button. An attendance report for the session event will be displayed.
3. Choose one of the following:
  - To download the data as a Microsoft Excel file that you can manipulate and format, click **Download Data as File**. The file will be downloaded to your computer.
  - To view a printable version on the screen, click **Printable Version**. The data will be displayed on the screen.
  - To download a PDF of the data, click **PDF Version**. The file will be downloaded to your computer.

*Attendance page for a session event*

Attendee Name	Group Attended
Muddyskipper, Muddy	<input type="checkbox"/>
Parker, Peter	<input type="checkbox"/>
Squarepants, Spongebob	<input type="checkbox"/>
Watson, Mary Jane	<input type="checkbox"/>

1

Save Done Report

## Recording Attendance

To record attendance at a session event, follow these steps:

1. At the Manage a Program Session page, click the name of the session event or the attendance icon. The Attendance page containing a list of all the registrants for the session event will be displayed.
2. To mark a registrant as attended, click the checkbox in the Attended column next to the registrant's name.
3. To save your changes, click **Save**.
4. To return to the Manage a Program Session page, click **Done**.