

Online Registration FAQs

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

How do we register individuals from the 'back end'? (Over the phone)

Add attendee to Roster

Choose Registration options (i.e. payment for course and additional items if there are any)

Select payment option (you may only have one), click Add to Cart

Select Payment Option

Different payment options may affect how this registration is completed.

Pay Online/Credit Card
Paying online enables the ability to purchase multiple event registrations in a single transaction.

Pay by Phone
Call 406-404-1624 to register.

Add to Cart

Click View Cart

Event Attendance Exit Roster Cart (2)

Online Training Registration Test EVENT ID: 501495

Friday, November 4, 2016

6:30pm to 8:30pm (2.00 Hours) Beginning

LOCATION PRIMARY TRAINER
Bozeman, MT Tiffany Krushensky

The event registration has been successfully added to your cart. **View Cart**

Click the edit button to choose who to bill to

Event Cart Cart (1)

Online Training Registration Test	Seats Remaining: 3
Friday, November 4, 2016 to Friday, November 4, 2016	EVENT ID: 501495
Attendee: Libby Hancock	
Registration Fee	
Online Registration Training Fee (Ends 11/01/2016)	\$25.00

Cart Summary

Bill To:

Total **\$25.00**

Check Out

Search and choose the individual registering

The screenshot shows a search window titled "Locate Bill To Source". It features a search bar with the placeholder text "id, name, or email" and a green "Search" button. A red circle highlights the "Search" button. Below the search bar, there is a table with two columns: "Source" and "Name & Address". A message "No results to display." is shown in an orange banner at the bottom of the table.

Click Check Out

The screenshot displays the "Event Cart" and "Cart Summary" sections. The "Event Cart" shows an item for "Online Training Registration Test" with a price of \$25.00 and 3 seats remaining. The "Cart Summary" shows a total of \$25.00 and a green "Check Out" button. A red circle highlights the "Check Out" button.

Enter Payment information

The screenshot shows the "Checkout" form. It includes a "Bill To" section with the name "#27381 Libby Hancock" and a "Total" of "\$25.00". The form contains input fields for "Email Address", "Card Number", "Exp MM / YY", "CVC", and "Zip Code". A green "Submit Payment" button is located at the bottom. A red box highlights the "Email Address" and "Zip Code" fields.

How do we send emails to individuals on the roster?

Choose the event out of the organizations list of trainings.

Click on the Manage Event drop down and choose Manage Roster.

The screenshot shows the 'Event Details' page for 'Online Training Registration Test' (Event ID: 501495). The event is scheduled for Friday, November 4, 2016, from 6:30pm to 8:30pm, lasting 2.00 hours. It is a 'Beginning' level event. The 'Event Admin' tab is active. In the 'Event Status' section, the 'Manage Event' dropdown menu is open, with 'Manage Roster' selected. Other options include 'Duplicate Event', 'Manage Online Registration', and 'Online Registration: Activated (10/25/2016)'. The event roster shows 4 attendees.

Click Email Attendees

The screenshot shows the 'Event Attendance' page for 'Online Training Registration Test' (Event ID: 501495). The event is scheduled for Friday, November 4, 2016, from 6:30pm to 8:30pm, lasting 2.00 hours. It is a 'Beginning' level event. The primary trainer is Tiffany Krushensky. The 'Active Roster' section shows a table with 3 attendees. The 'Email Attendees' button is circled in red.

Registry ID	Name Address	Type	Registered	Paid	Attended	
	Helena, MT 59601	Agency Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
20	Klaas, Ann 12970 Cottonwood Rd Bozeman, MT 59718	Agency Staff	<input checked="" type="checkbox"/>	enter payment	<input type="checkbox"/>	
9700	Krushensky, Tiffany 166 Jackson Ln. Belgrade, MT 59714		<input checked="" type="checkbox"/>	enter payment	<input type="checkbox"/>	

Click Compose Email

Event Attendance ◀ Exit Roster 0

Online Training Registration Test EVENT ID: 501495

Friday, November 4, 2016 👤 Beginning

🕒 6:30pm to 8:30pm
(2.00 Hours)

LOCATION **PRIMARY TRAINER**
Bozeman, MT Tiffany Krushensky

Step 1: Select Email Recipients Return To Roster

<input checked="" type="checkbox"/> Select All	Registry ID	Name Address	Type	Registered	Paid	Attended
<input checked="" type="checkbox"/>		Helena, MT 59601	Agency Staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	20	Klaas, Ann 12970 Cottonwood Rd Bozeman, MT 59718	Agency Staff	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	9700	Krushensky, Tiffany 166 Jackson Ln. Belgrade, MT 59714		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Next: Compose Email

Compose the email

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

Note: Check the box next to the 'From' box to receive a CC of the email.

Click Preview Email

Step 2: Compose Email

From: Send a copy to this email address.

Subject:

🔍 📎 📧 **B** *I* U 🔄 🌐 📧 **Rea...** **ABC**

Previous: Select Recipients Next: Preview Email

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

Step 3: Preview Email

To: [selected recipients](#)

From: ann.klaas@montana.edu

Subject: Reminder

Dear [Attendee Name],

Please do not forget to bring your materials to the training on November 4th. See you all soon!

Previous: Compose Email

Finish: Send Email

A success message will be shown on the page.

How do we view and print a roster of individuals attending and items they have registered for?

Choose the event out of the organizations list of trainings.

Click on the Manage Event drop down and choose Manage Roster.

The screenshot shows the 'Event Details' page for 'Online Training Registration Test' (Event ID: 501495). The event is scheduled for Friday, November 4, 2016, at 6:30pm to 8:30pm (2.00 Hours) in Bozeman, MT. The event status is 'Approved' and has 4 attendees. A 'Manage Event' dropdown menu is open, with 'Manage Roster' highlighted. Other options in the menu include 'Manage Online Registration', 'Cancel Event', and 'Reschedule Event'. The 'Event Admin' and 'Course Details' tabs are visible at the top.

Click on the Print Roster button

The screenshot shows the 'Event Attendance' page for 'Online Training Registration Test' (Event ID: 501495). The event is scheduled for Friday, November 4, 2016, from 6:30pm to 8:30pm (2.00 Hours) in Bozeman, MT. The primary trainer is Jamie Warmbrodtest. The 'Active Roster' section shows 3 attendees. A 'Print Roster' button is highlighted with a red circle. Other buttons include 'Exit Roster', 'Removed Attendees (3)', and '+ Attendee'.

View the report or export into a different file type by clicking save button

montana early childhood project Train Record

Event ID: 501495
Title: Online Training Registration Test
Sponsor: The Montana Early Childhood Project
Trainer: Jamie Warmbrodtest
Location: Montana Early Childhood Project
Bozeman, MT
Number of Hours: 2.00

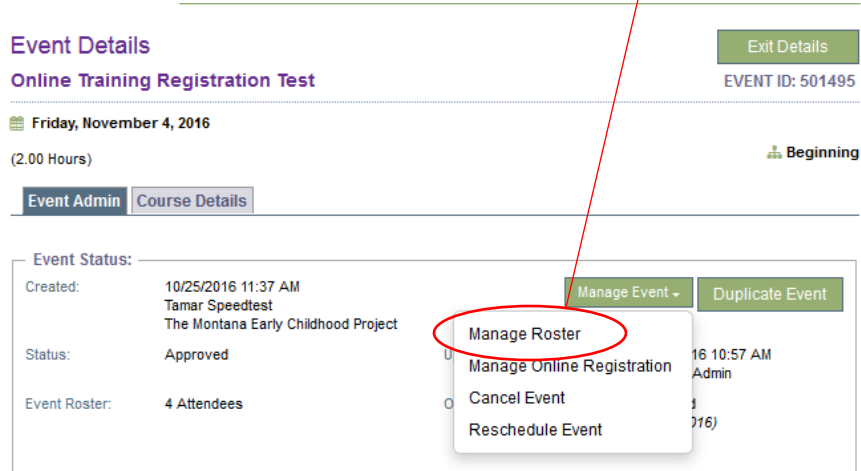
Indy ID	Last Name	First Name	Email Address	Position Title	Address	City	Paid	Books	Food
9279	Allentest	Amy	Amy.Allentest@email.com	Center/Preschool Director	900 DiMaggio Dr.	Bozeman	Unpaid	--	--
36278	Greenetest	Andria	Andria.Greenetest@email.com		58 Dry Creek Trail	Billings	Unpaid	--	--
17001	Hill Larson	Christy	Kristen.Urbaniaktest@email.com	Child/Family Service Agency Staff	111 11th Ave W	Great Falls	Unpaid	--	--
20	Klaas	Ann	Kourtenay.Clelandtest@email.com	Child/Family Service Agency Staff	652 Willow Glen Drive	Missoula	Unpaid	--	--

Printed: 11/18/2016

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

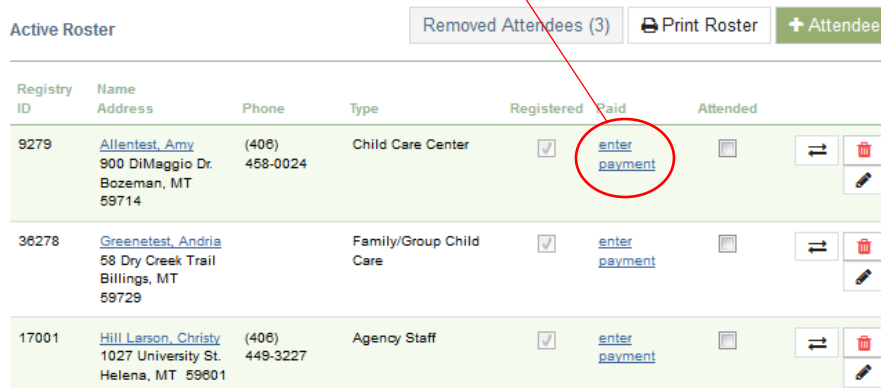
Choose the event out of the organizations list of trainings.

Click on the Manage Event drop down and choose Manage Roster.



The screenshot shows the 'Event Details' page for 'Online Training Registration Test' (Event ID: 501495) on Friday, November 4, 2016, at 2:00 hours. The 'Event Status' section shows it was created on 10/25/2016 at 11:37 AM by Tamar Speedtest. The 'Event Roster' shows 4 attendees. A 'Manage Event' dropdown menu is open, with 'Manage Roster' highlighted. Other options include 'Manage Online Registration', 'Cancel Event', and 'Reschedule Event'. A 'Duplicate Event' button is also visible.

Click enter payment next to the individual that has paid



The screenshot shows the 'Active Roster' table with columns for Registry ID, Name, Address, Phone, Type, Registered, Paid, and Attended. Three individuals are listed, each with a circled 'enter payment' link in the 'Paid' column.

Registry ID	Name	Address	Phone	Type	Registered	Paid	Attended
9279	Allentest, Amy	900 DiMaggio Dr. Bozeman, MT 59714	(406) 458-0024	Child Care Center	<input checked="" type="checkbox"/>	enter payment	<input type="checkbox"/>
36278	Greenetest, Andria	58 Dry Creek Trail Billings, MT 59729		Family/Group Child Care	<input checked="" type="checkbox"/>	enter payment	<input type="checkbox"/>
17001	Hill Larson, Christy	1027 University St. Helena, MT 59601	(406) 449-3227	Agency Staff	<input checked="" type="checkbox"/>	enter payment	<input type="checkbox"/>

Enter check information, including Check Number, Check Date, and Amount, click submit.

Payment For: Allentest, Amy ✕

Invoice: 9279-20161110-5
Status: Unpaid
Amount: \$25.00

Payment From: **#9279 Amy Allentest**
Amy.Allentest@email.com
receipt will be sent via email

Pay Online

Clicking "Pay Invoice" will allow you to pay via credit card online. Pay Invoice

Check/Money order

Check Nbr:
Check Date:
Amount:
Notes:

Submit

How do we add a person to the roster if they show up to the training and did not register?

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

Event Status:

Created: 10/25/2016 11:37 AM
Tamar Speedtest
The Montana Early Childhood Project

Status: Updated:

Event Roster: 5 Attendees Online Registration:

Staff Notes:

[Manage Event](#)

- Edit Event
- Manage Roster**
- Manage Online Registration
- Cancel Event

Click on add Attendee

Online Training Registration Test EVENT ID: 501495

Friday, December 23, 2016

6:30pm to 8:30pm (2.00 Hours) Beginning

LOCATION Bozeman, MT **PRIMARY TRAINER**
Jamie Warmbrodtest

Active Roster [Removed Attendees \(3\)](#) [Print Roster](#) **[+ Attendee](#)**

Registry	Name
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Search for individual

Add Attendee [« Hide Form](#)

METHOD 1 : Locate Registry Account

A. By Registry ID
PS#(PS999999)/Registry ID
 [Locate »](#)

C. Advanced Search
Search by name or city
 * [Search »](#)

B. By SSN and Birth Date
Last 5 Digits of SSN:
Birth Date: [Locate »](#)

Choose program type

Registry Account Found Return

Please verify that this is the correct person before adding them to the roster.
NOTE: You cannot edit contact information for an existing registry account.

Registry ID: 8148
Name: Tiffany Absheretest
Address: 1316 Delea Drive
Missoula, MT 59404
Missoula County

Home/Mobile Phone: --
Work Phone: --
Email Address: Tiffany.Absheretest@email.com

Select Type*:

<input type="radio"/> Child Care Center	<input type="radio"/> Agency Staff	<input type="radio"/> Public School
<input type="radio"/> Family/Group Child Care	<input type="radio"/> School-Age Staff	<input type="radio"/> Parent/Guardian
<input type="radio"/> Head Start	<input type="radio"/> Special Education	<input type="radio"/> Other
<input type="radio"/> Early Head Start		

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

Select Registration Options:

Registration Fee

<input checked="" type="checkbox"/> Online Registration Training Fee Fee for training	\$25.00
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Books
Choose any books you would like to purchase.

<input type="checkbox"/> Online Registration User Guide User Guide created to walk you through online registration.	\$5.00
<input checked="" type="checkbox"/> Course and Event User Guide User Guide to walk you through the Course and Event approval process.	\$5.00
<input type="checkbox"/> New User guides User Guide created to walk you through online registration.	\$5.00

Food
If you would like lunch provided choose one option.

<input type="checkbox"/> Chicken Chicken, vegetables, and a baked potato.	\$15.00
<input type="checkbox"/> Vegetarian Veggie pasta with french bread	\$15.00

Total: \$30.00

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

Select Payment Option

Different payment options may affect how this registration is completed.

<input checked="" type="radio"/> Pay Online/Credit Card Paying online enables the ability to purchase multiple event registrations in a single transaction.
<input type="radio"/> Pay by Check Send payment to: PO Box 173540 Bozeman, MT 59717

Add to Cart

Click view cart to collect the individuals credit card information

Event Attendance
Online Training Registration Test
EVENT ID: 501495

Friday, December 23, 2016
6:30pm to 8:30pm (2.00 Hours)
LOCATION: Bozeman, MT
PRIMARY TRAINER: Jamie Warmbrodtest

Beginning

The event registration has been successfully added to your cart.

View Cart

Click the edit button to choose who to bill to

Event Cart

Online Training Registration Test
Friday, November 4, 2016 to Friday, November 4, 2016
Attendee: Libby Hancock
Registration Fee: \$25.00

Seats Remaining: 3
EVENT ID: 501495

Cart Summary
Bill To: [edit icon]
Total: \$25.00
Check Out
Search Events

Search and choose the individual registering

Locate Bill To Source

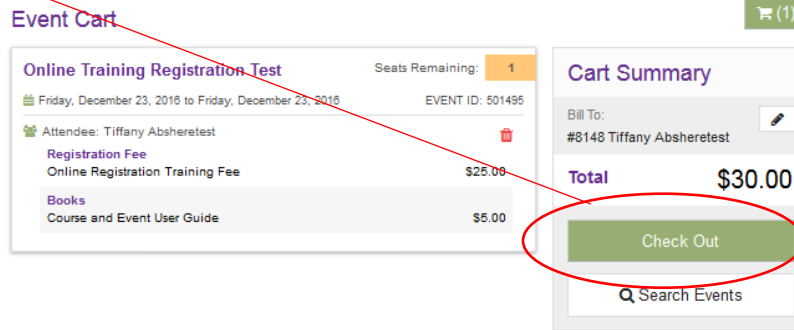
Search by Individual ID, Name, or Email Address.

id, name, or email [Search] [Clear]

Source Name & Address

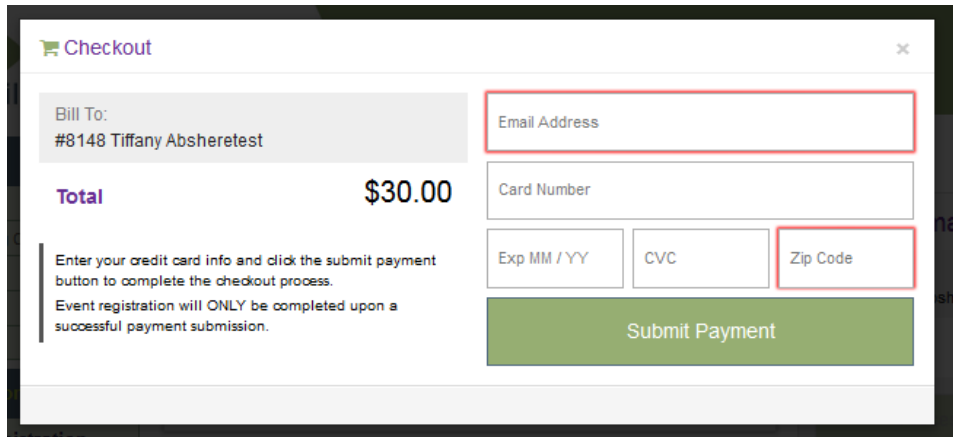
No results to display.

Click Check Out



The image shows a user interface for an event cart. On the left, under the heading "Event Cart", there is a section for "Online Training Registration Test". It includes the event dates (Friday, December 23, 2016 to Friday, December 23, 2016), event ID (501495), and attendee name (Tiffany Absheretest). A list of items is shown: "Registration Fee" for \$25.00 and "Books" (Course and Event User Guide) for \$5.00. On the right, a "Cart Summary" box shows the "Total" as "\$30.00". A green "Check Out" button is highlighted with a red circle. A red arrow points from the text "Click Check Out" to this button. Below the cart summary is a "Search Events" field.

Enter Payment information



The image shows a "Checkout" form. On the left, it displays "Bill To: #8148 Tiffany Absheretest" and a "Total" of "\$30.00". Below this, there is a note: "Enter your credit card info and click the submit payment button to complete the checkout process. Event registration will ONLY be completed upon a successful payment submission." On the right, there are input fields for "Email Address", "Card Number", "Exp MM / YY", "CVC", and "Zip Code". A green "Submit Payment" button is located at the bottom right of the form.

How do we use the transfer roster button?

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

Event Status:

Created: 10/25/2016 11:37 AM
Tamar Speedtest
The Montana Early Childhood Project

Status: Updated:

Event Roster: 5 Attendees Online Registration:

Staff Notes:

[Manage Event](#)

- Edit Event
- Manage Roster**
- Manage Online Registration
- Cancel Event

View your active roster and click the Transfer button

Active Roster [Removed Attendees \(3\)](#) [Print Roster](#) [+ Attendee](#)

Registry ID	Name Address	Phone	Type	Registered	Paid	Attended	
9279	Allentest, Amy 900 DiMaggio Dr. Bozeman, MT 59714	(406) 458-0024	Child Care Center	<input checked="" type="checkbox"/>	paid	<input type="checkbox"/>	Transfer Delete
36278	Greenetest, Andria 58 Dry Creek Trail Billings, MT 59729		Family/Group Child Care	<input checked="" type="checkbox"/>	enter payment	<input type="checkbox"/>	Transfer Delete
17001	Hill Larson, Christy 1027 University St. Helena, MT 59601	(406) 449-3227	Agency Staff	<input checked="" type="checkbox"/>	enter payment	<input type="checkbox"/>	Transfer Delete
20	Klaas, Ann 12970 Cottonwood Rd Bozeman, MT 59718	(406) 763-4948	Agency Staff	<input checked="" type="checkbox"/>	enter payment	<input type="checkbox"/>	Transfer Delete
48897	Robbinest, Naomi 608 7th Ave N Belgrade, MT 59401-	(406) 490-1044	Early Head Start	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Transfer Delete

[Email Attendees](#) [Update Attendance](#)

Choose the training you are transferring the individual to, this list will reflect the current events that you have approved in the system.

Transfer Registration
Attendee: #9279 Allentest, Amy

Search all events by Event ID, course title, trainer name, location name or city

Select Event

ID	Date	Course Title	Web	Location/URL	Trainer	Event Status
501172	5/14/2016 - 5/14/2017	Training Basics	<input type="checkbox"/>	Bozeman, MT	Sandra Morris	Approved
501498	12/7/2016	Immunization Training Module	<input type="checkbox"/>	Montana Early Childhood Project Bozeman, MT	Ann Klaas	Pending

Click Confirm

Confirm Transfer
Attendee: #9279 Allentest, Amy

Search all events by Event ID, course title, trainer name, location name or city

Selected Event

Event: 501172
Date: 5/14/2016 - 5/14/2017
Title: Training Basics
Location: Bozeman, MT

Note: If the fee for the training is not the same you will need to collect the rest of the fee from the individual or refund the individual through stripe. Your organization may create your own policies of how you would like to handle these situations.

What extra fees are charged when using online registration?

- There is a flat fee of \$1.00 charged by the system developers.
 - This fee is charged when the payment is made online with a credit card.
- There is a 2.5% fee that will be charged on the fee total of the training for the use of Stripe (the online payment provider).
- There will be a \$2.00 fee per check that is accepted for registration fees.
 - This fee is not on top of the fees charged above.
 - Your organization may choose to charge this extra fee to their users. To do this add wording to the alternate payment description (screen shot below). **Note:** The total fee for the training in the system will not reflect this extra fee.

Alternate Payments

Enable: Yes

Payment Name:

Describe the alternate payment type

Instructions on how to provide desired alternate payment.

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Send payment to:
PO Box 173540
Bozeman, MT 59717

How often do we get invoiced for check payments? (If your organization has chosen to accept checks)

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