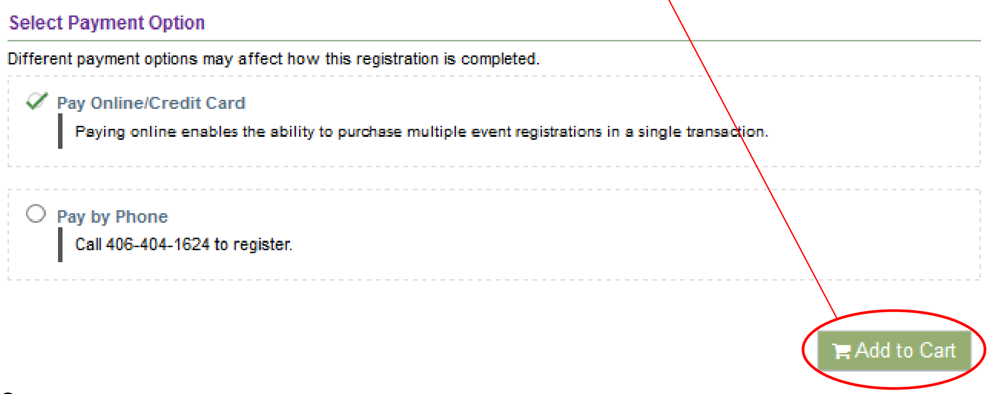
Online Registration FAQs

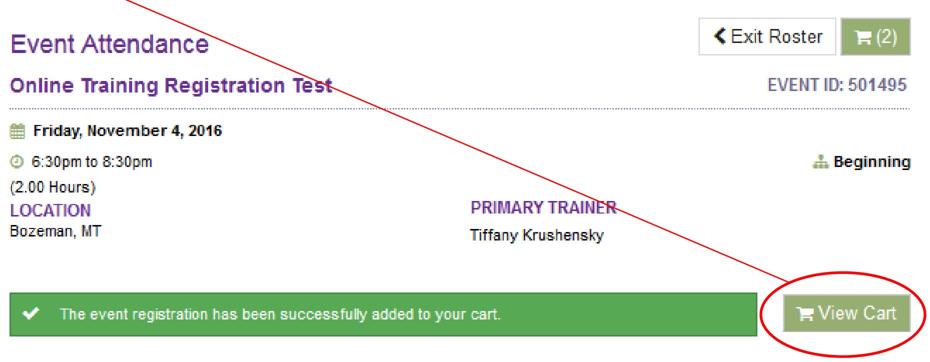
- **How do we register individuals from the 'back end'? (Over the phone)**
- **How do we send emails to individuals on the roster?**
- **How do we view and print a roster of individuals attending and items they have registered for?**
- **How do we add payments when made by check (if applicable)?**
-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

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

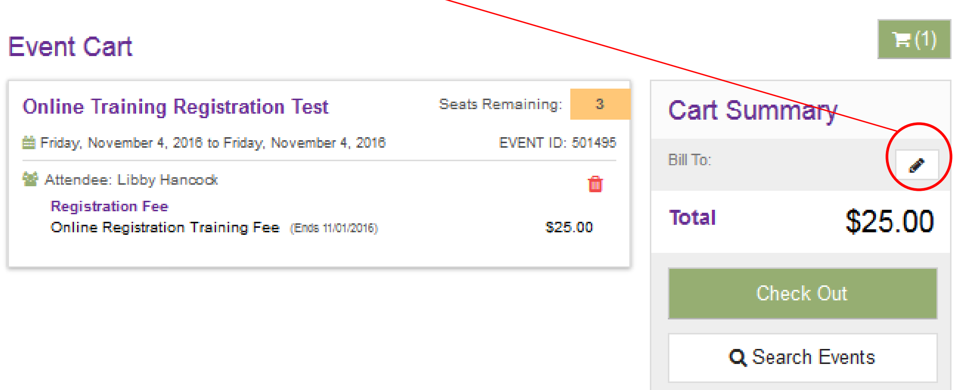
Add attendee to Roster
Choose Registration options (i.e. payment for course and additional items if there are any)
Select payment option (you may only have one), click Add to Cart



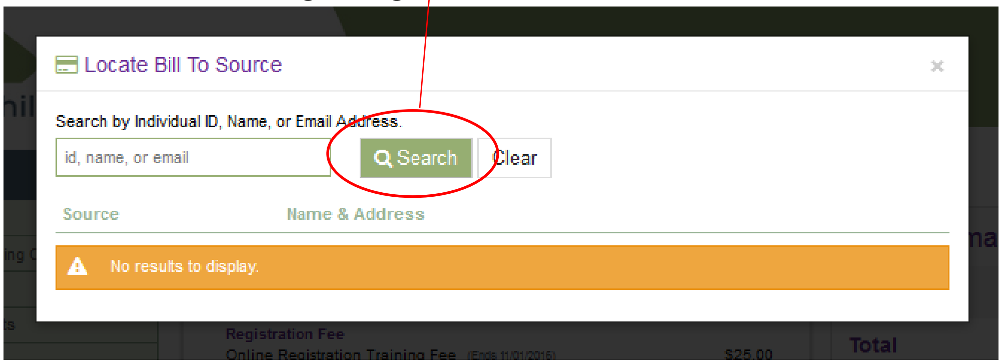
Click View Cart



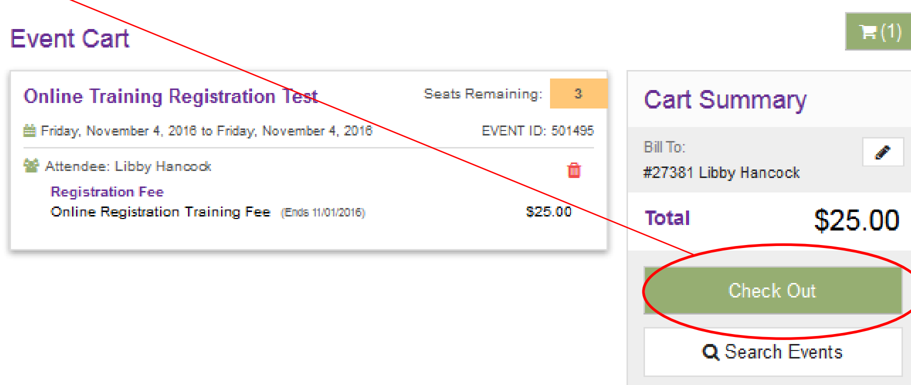
Click the edit button to choose who to bill to



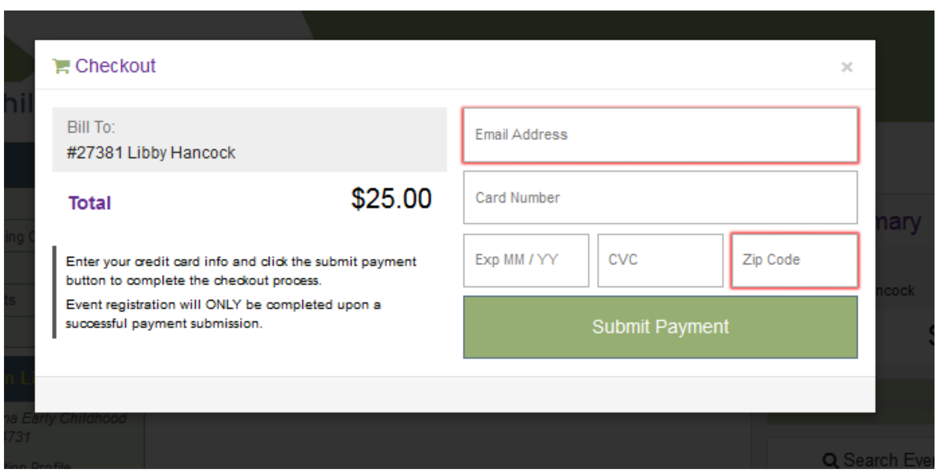
Search and choose the individual registering



Click Check Out

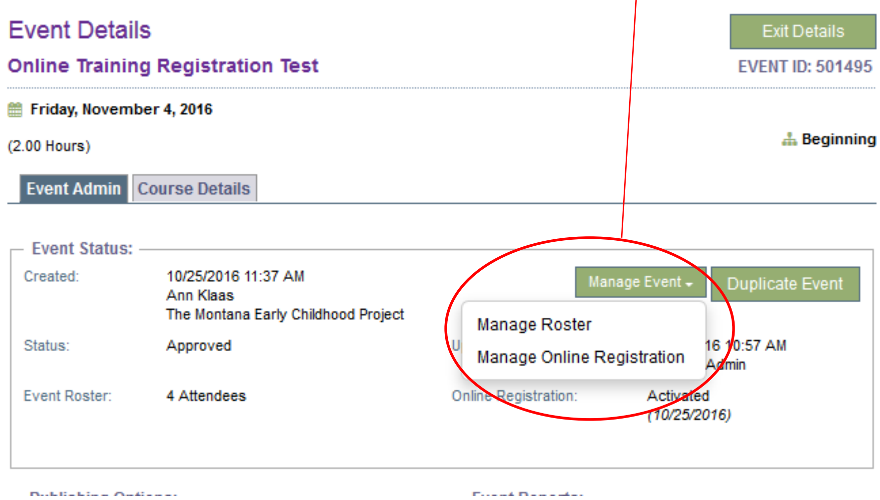


Enter Payment information

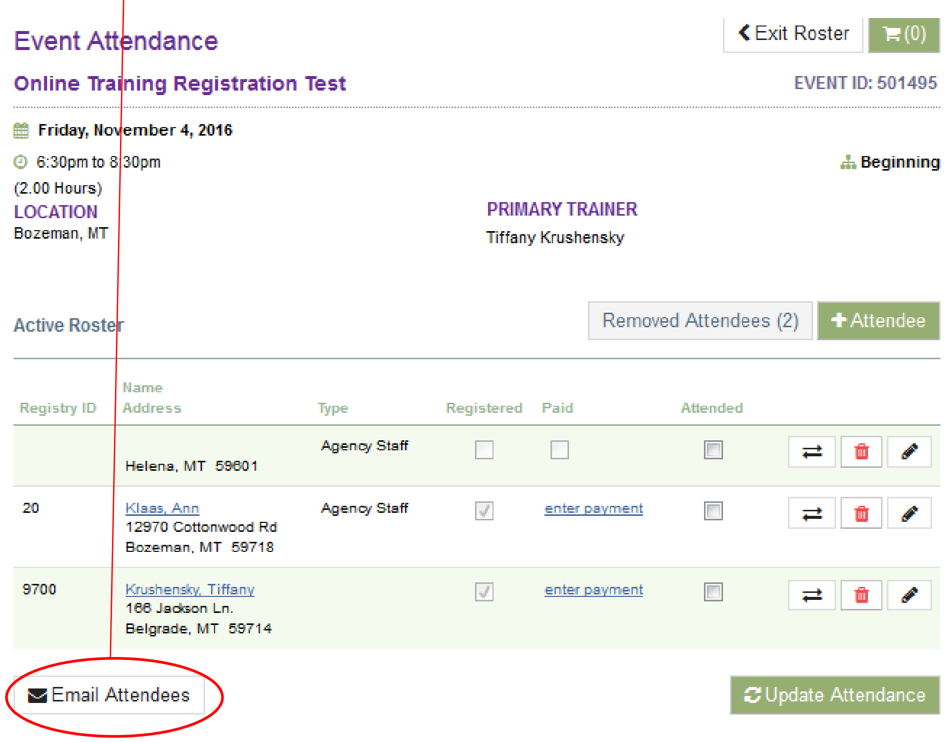


How do we send emails to individuals on the roster?

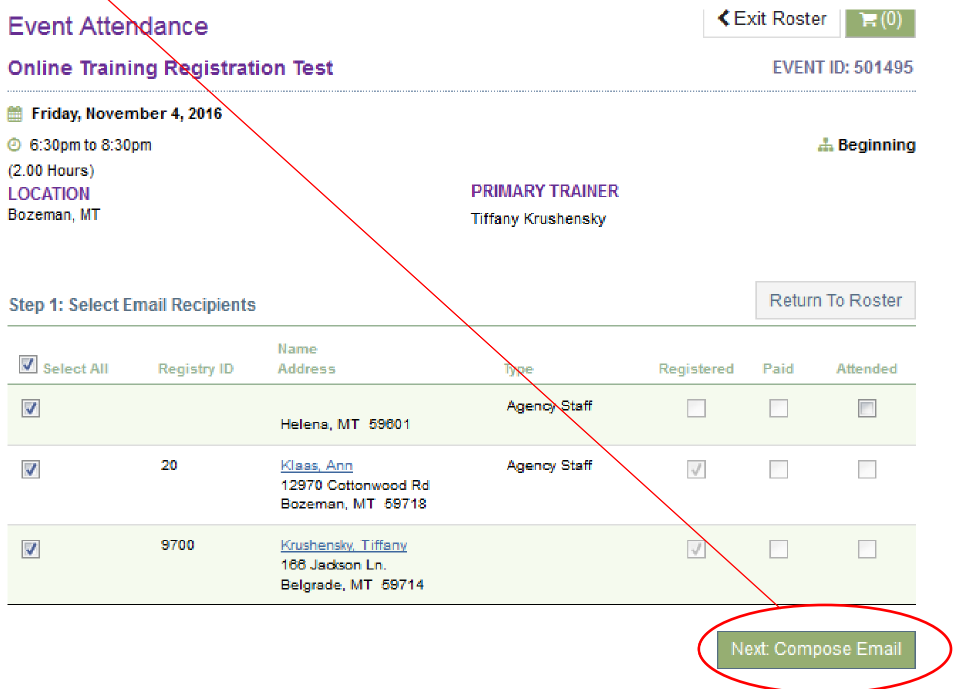
Choose the event out of the organizations list of trainings.
Click on the Manage Event drop down and choose Manage Roster.



Click Email Attendees



Click Compose Email

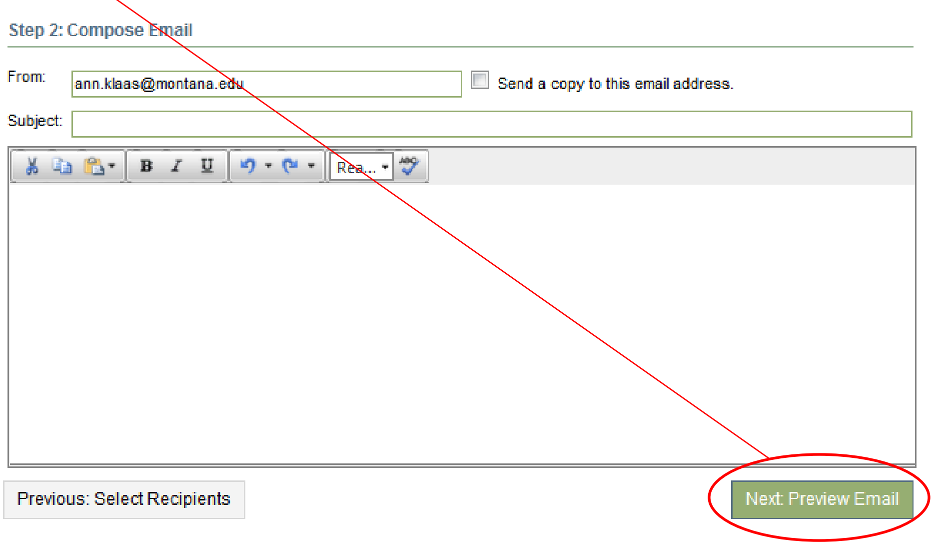


Compose the email

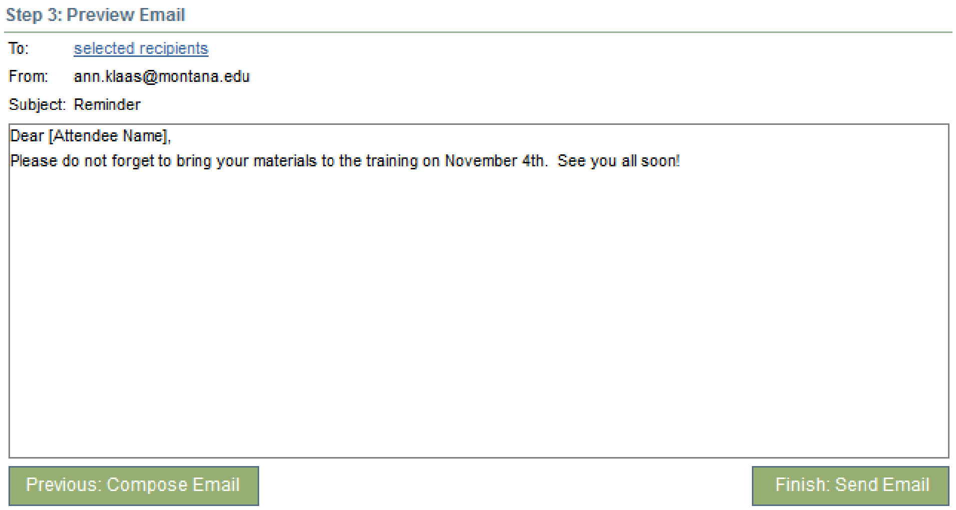
Note: The email in the ‘From’ box is the contact for the organization. If that email should come from a different individual, change it here.

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

Click Preview Email



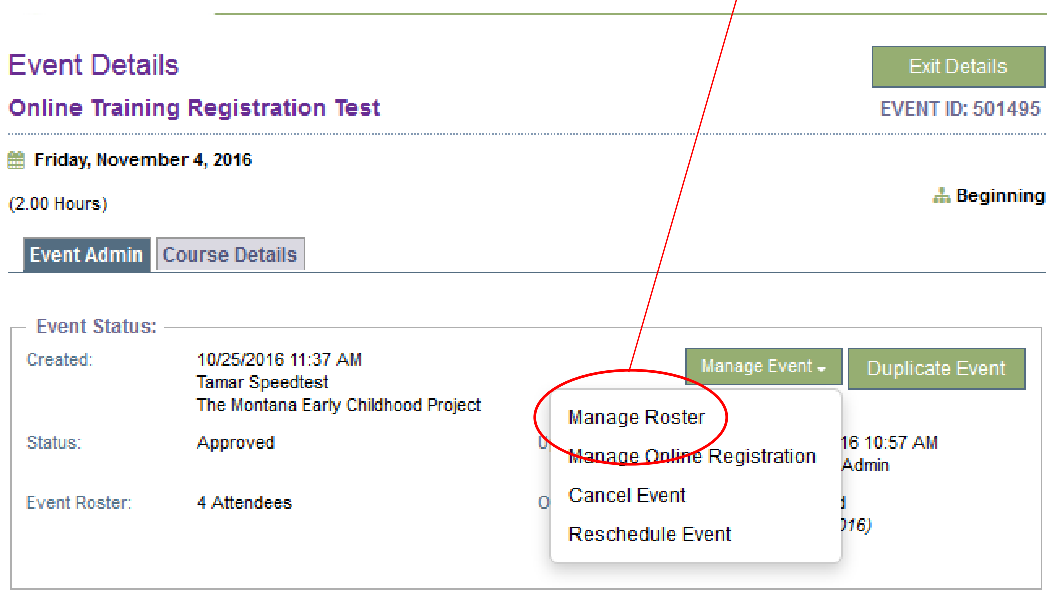
If email is complete, click Send Email. If the email needs editing, click Compose Email.



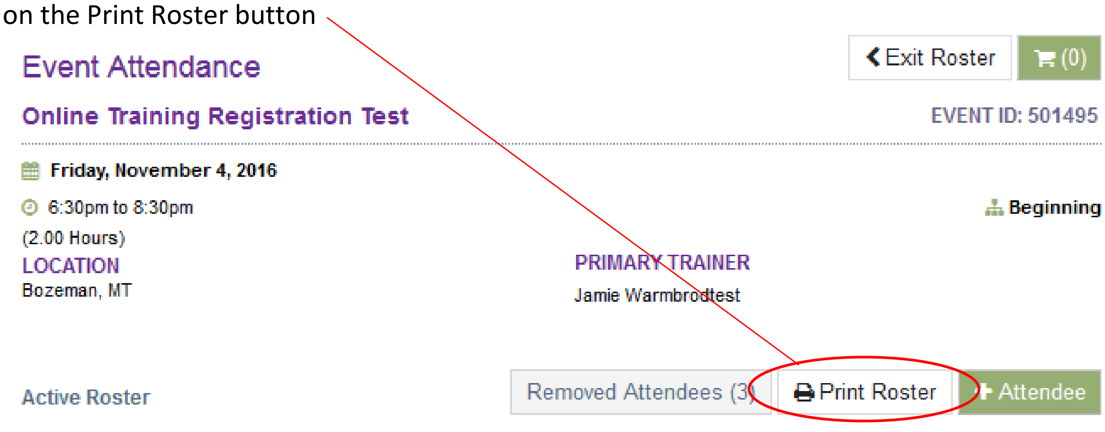
A success message will be shown on the page.

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

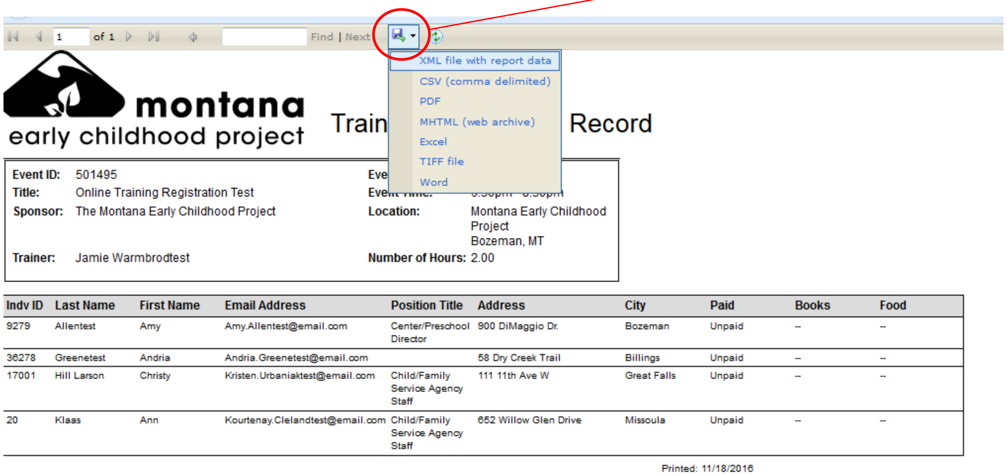
Choose the event out of the organizations list of trainings.
Click on the Manage Event drop down and choose Manage Roster.



Click on the Print Roster button



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



1 of 1 Find | Next

XML file with report data
CSV (comma delimited)
PDF
MHTML (web archive)
Excel
TIFF file
Word

montana early childhood project

Train Record

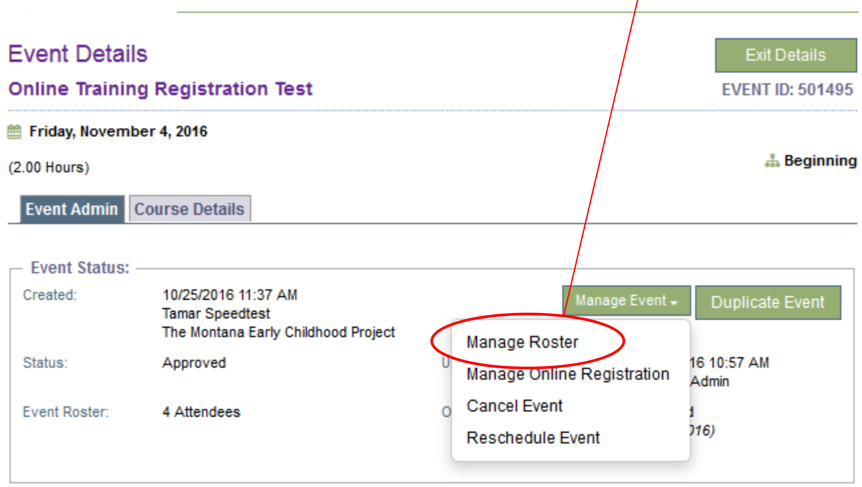
Event ID:	501495	**Eve**	
Title:	Online Training Registration Test	**Event Time:**	6:30pm - 8:30pm
Sponsor:	The Montana Early Childhood Project	**Location:**	Montana Early Childhood Project Bozeman, MT
Trainer:	Jamie Warmbrodtest	**Number of Hours:**	2.00

Indv 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	--	--

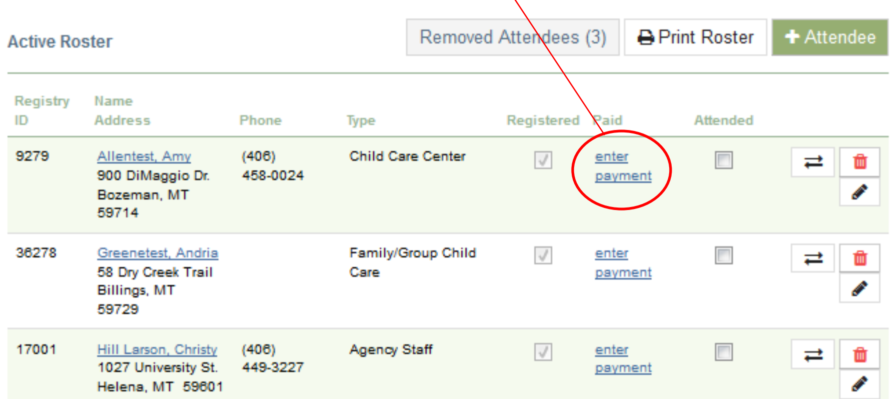
Printed: 11/18/2016

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

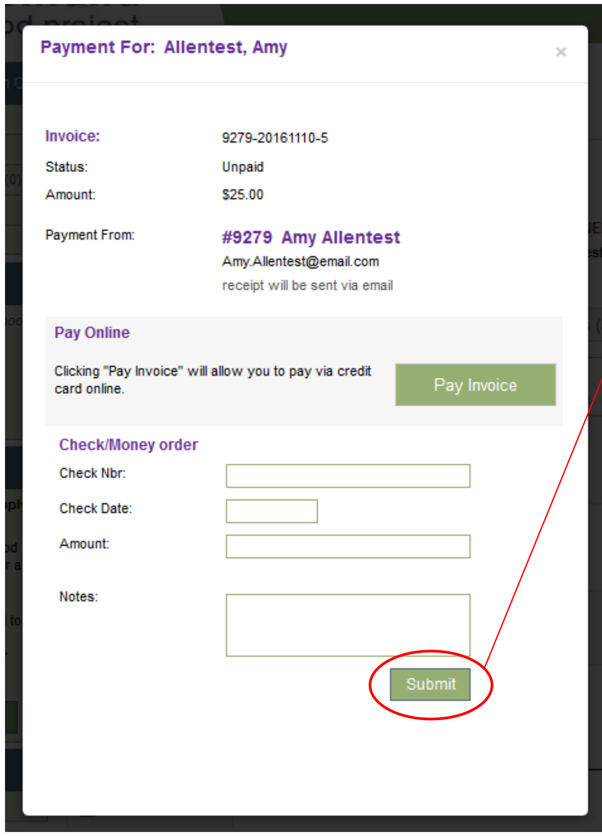
Choose the event out of the organizations list of trainings.
Click on the Manage Event drop down and choose Manage Roster.



Click enter payment next to the individual that has paid

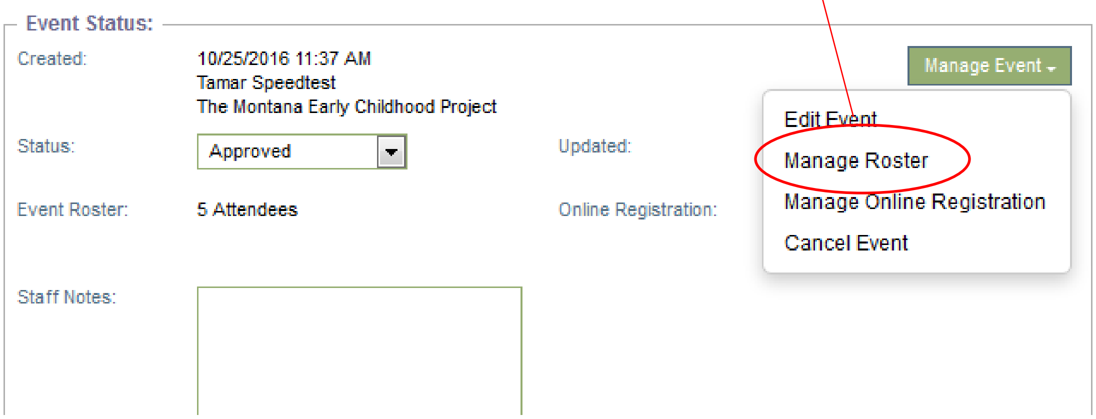


Enter check information, including Check Number, Check Date, and Amount, click submit.

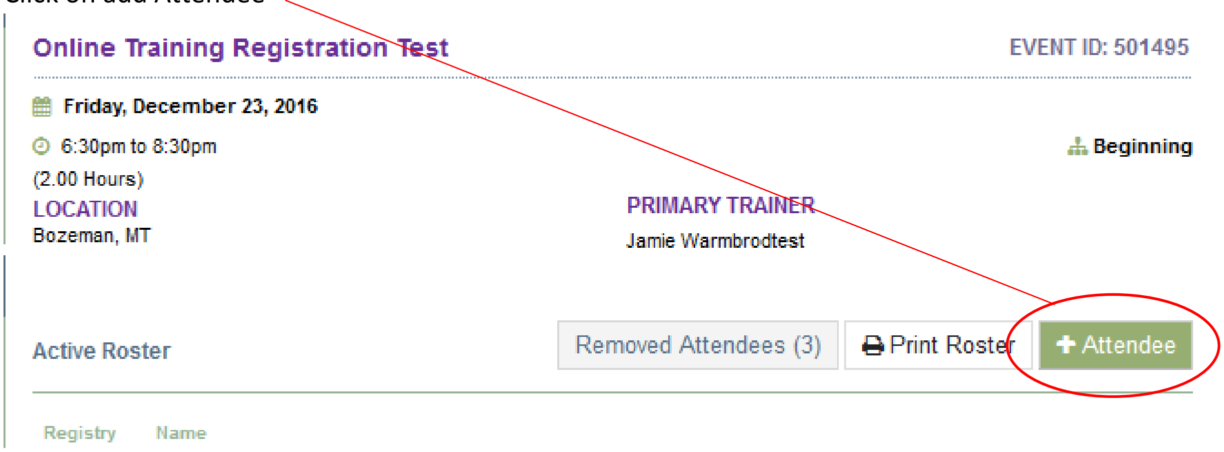


How do we add a person to the roster if they show up to the training and did not register?

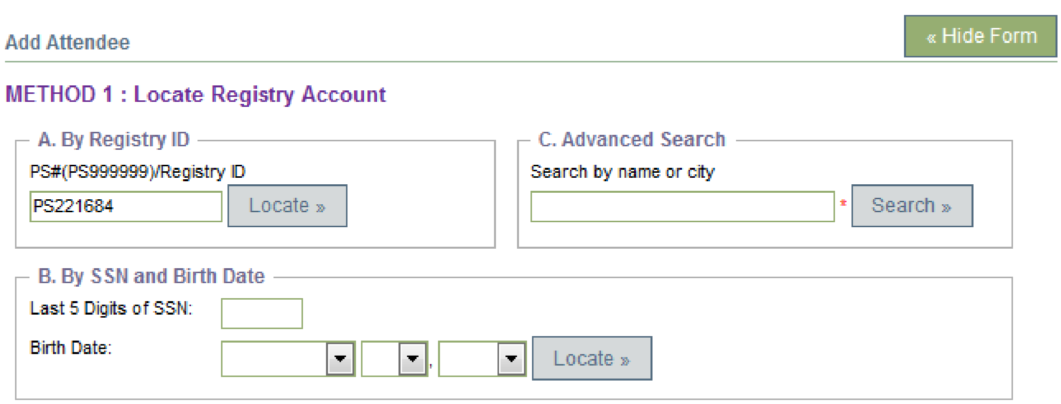
Choose the event out of the organizations list of trainings.
Click on the Manage Event drop down and choose Manage Roster



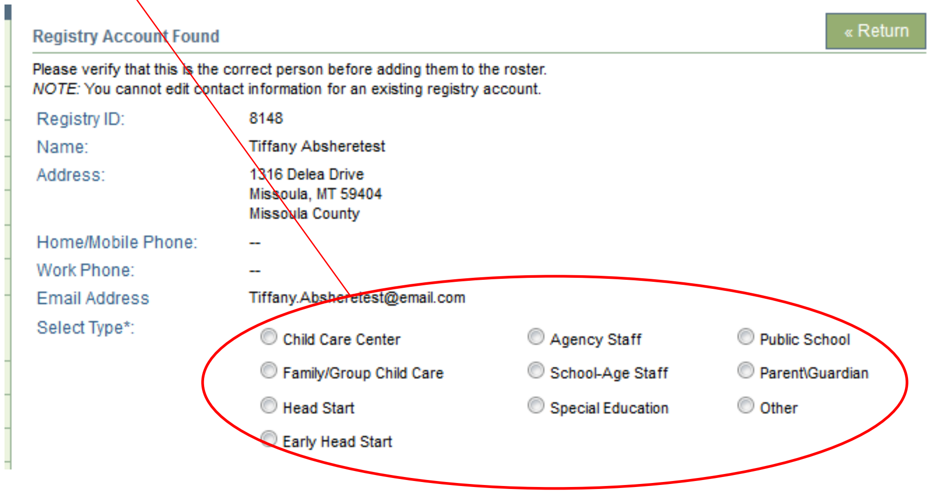
Click on add Attendee



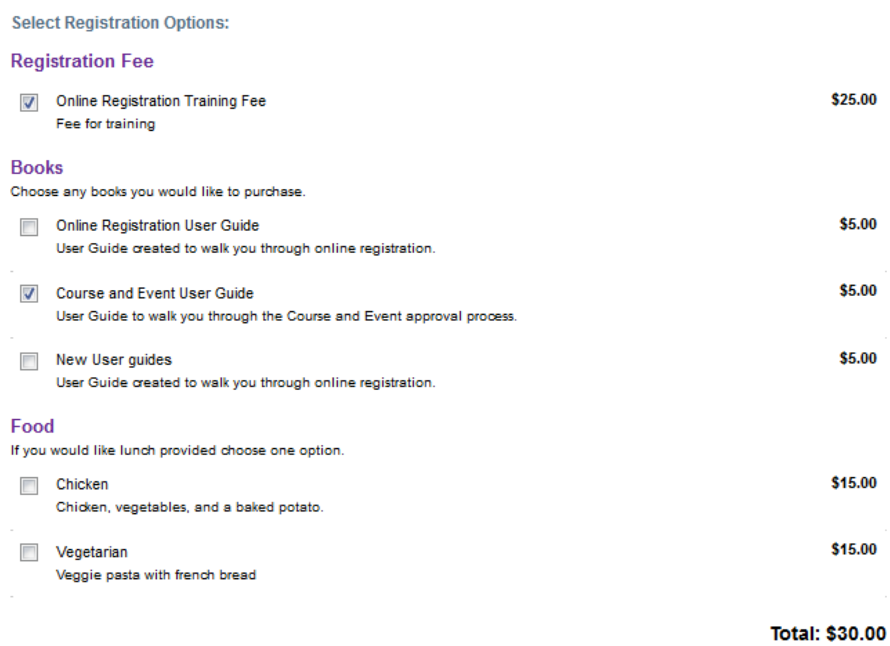
Search for individual



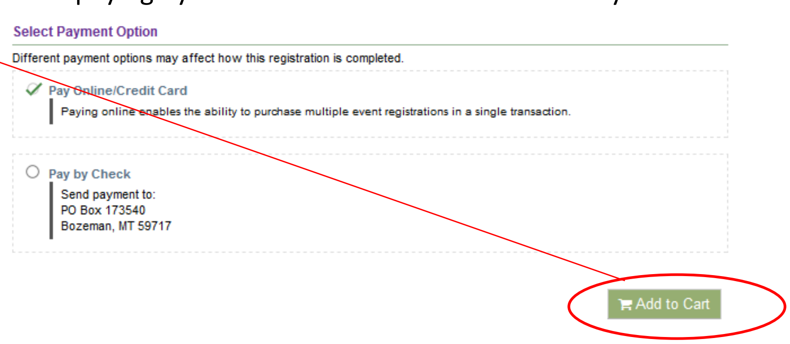
Choose program type



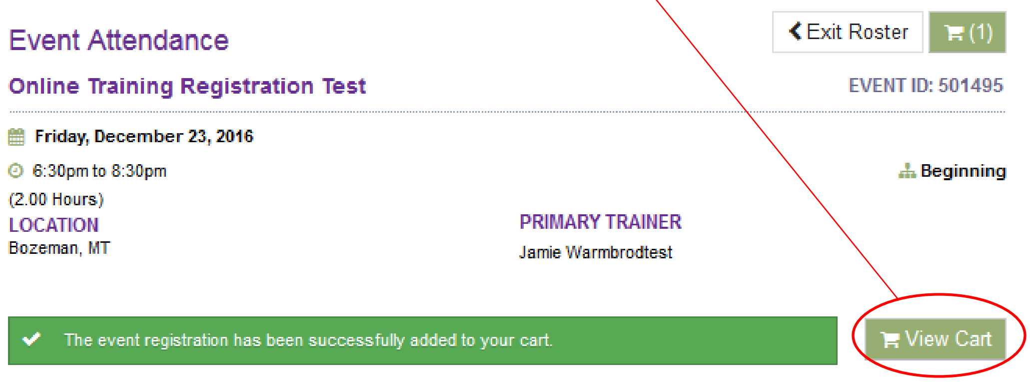
Check the fee for the training and any options they would like to choose if applicable



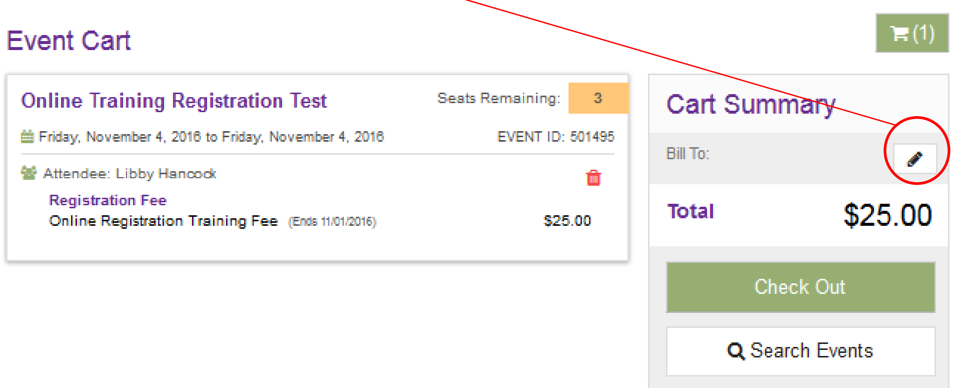
Choose the payment type if applicable for your organization. If individual is paying with credit cart click Add to Cart. If individual is paying by check use directions for check entry in this document.



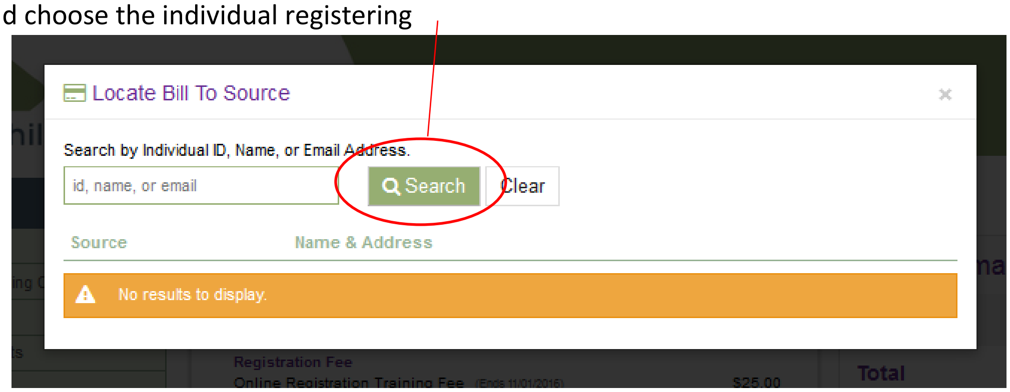
Click view cart to collect the individuals credit card information



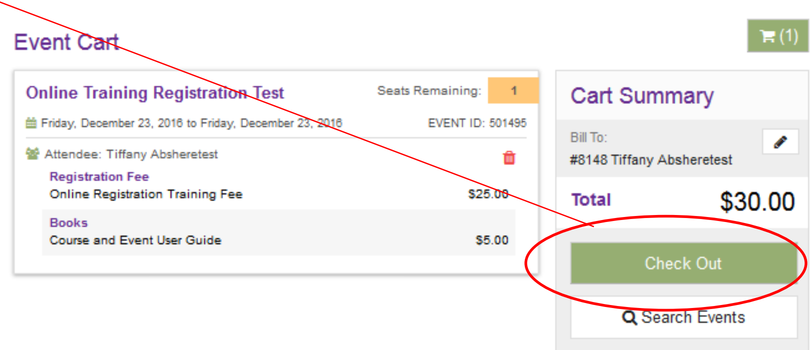
Click the edit button to choose who to bill to



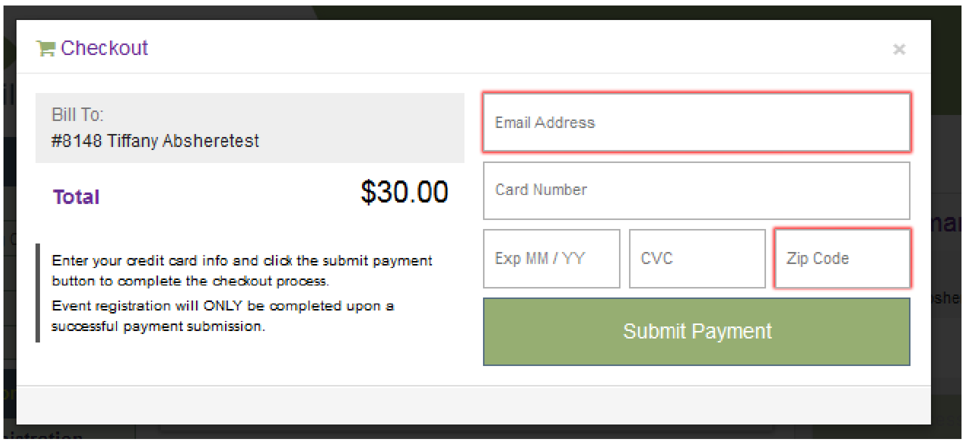
Search and choose the individual registering



Click Check Out

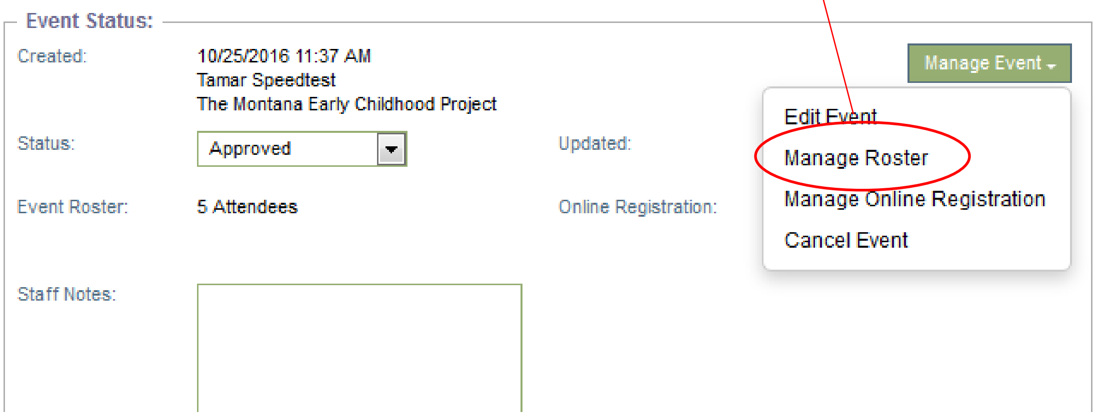


Enter Payment information

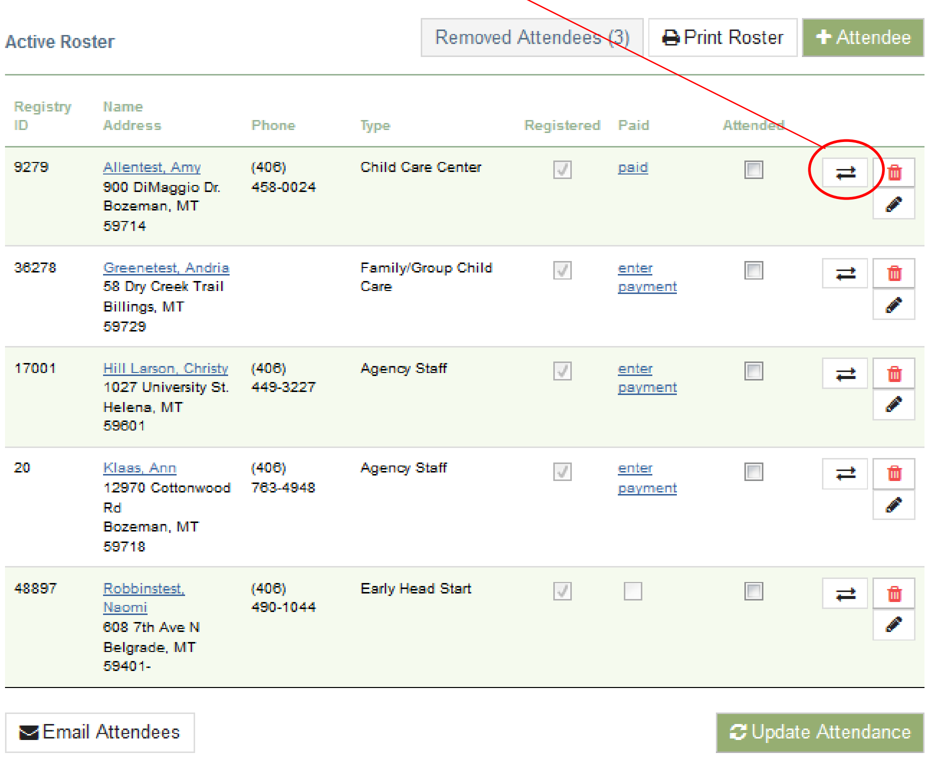


How do we use the transfer roster button?

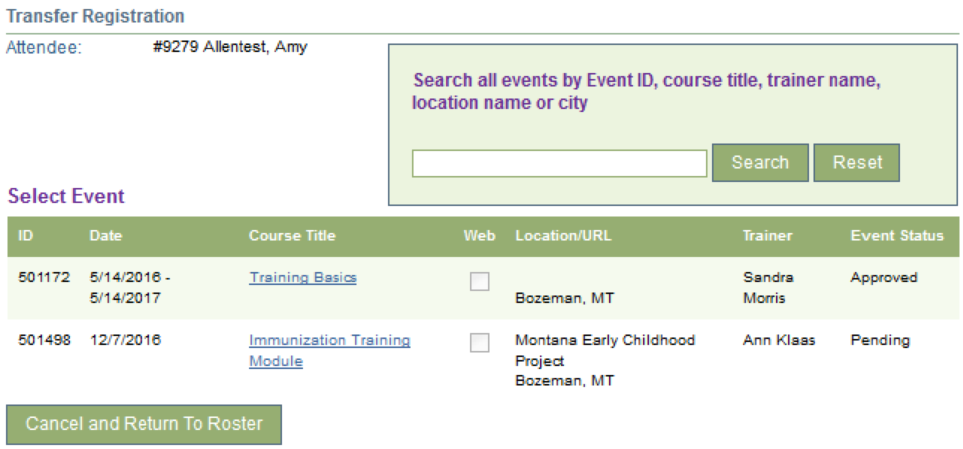
Choose the event out of the organizations list of trainings.
Click on the Manage Event drop down and choose Manage Roster



View your active roster and click the Transfer button

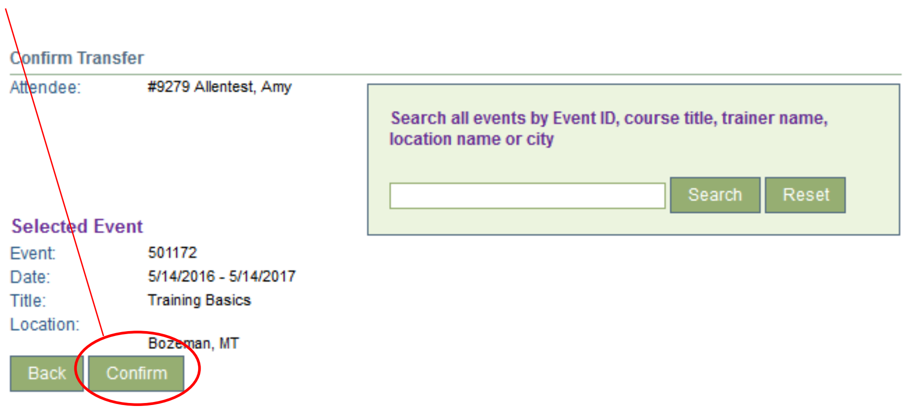


Choose the training you are transferring the individual to, this list will reflect the current events that you have approved in the system.



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

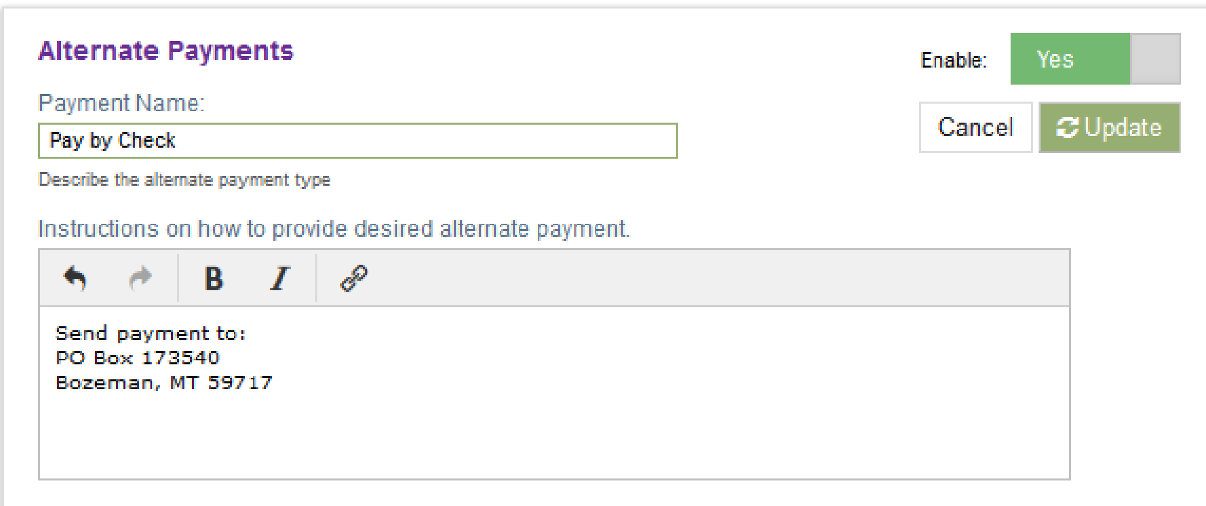
Click Confirm



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

What extra fees are charged when using online registration?

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



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.