

Event Association in Online Event Registration

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As of July 12, 2021, this "Learn Veracross" site has been deprecated. It will remain live at least through October 1, 2021, but will no longer be updated. All knowledge content has moved to the new [Veracross Community](#). Please update your bookmarks.

[Here is the new version of this article in the Veracross Community.](#)

Overview

Event association determines the first step of the registration process (event sign up). When a registrant is presented with the form they will immediately select which event they would like to sign up for. Beginning with event selection creates opportunities for event specific questions to be asked later in the registration process as needed. The type of event(s) the registration form is configured for informs a number of form/event configuration options such as the registration type, action type, extra questions, etc. Registration forms can be set up to include sign up for a single event, multiple events, or consolidated events. All events are associated with the form using the Events input grid on the registration form record.

Associating an event with a registration form creates a registration form event record from which all event configuration is conducted. Schools configure how the event will appear to registrants, how they will sign up for the event, and more.

The process for associating a group event with a registration form is as follows:

The screenshot shows the 'Registration Form: Maine Lobster Festival' configuration page. The 'GENERAL' section includes fields for Description, Registration Form URL, View in Browser, Registration Type, Design (Banner Color, Banner Image URL, Header Image URL), Status (Form Status, Security Category), Payment (Payment Type, Override Credit Card, Override ACH Provider, Currency Code), and Events Listing (Events Listing, Consolidated Events ONLY, Description, Contact Email, Action Label Override, Details). Below the configuration fields is a green 'Add Record' button. Underneath is a table with columns: Event, Action Type, # of Tickets, Description, Event Date, Event Time, Contact Email Address, Sort Key, and a pop-out icon. The table contains two records for 'Maine Lobster Festival' events. Red arrows point to the 'Add Record' button with the text 'Click to associate a new event with the registration form'. Another red arrow points to a magnifying glass icon in the table with the text 'Click the magnifying glass to search for a pre-existing event'. A third red arrow points to a pop-out icon in the table with the text 'Click the pop-out icon to open the registration form event record for events that have already been associated with this registration form.' The bottom right corner of the table shows '2 records'.

1. Confirm the group event that will be associated with the form has been created (add a new group event if necessary).
2. From the registration form record, click the green 'Add Record' button above the input grid and enter the name of the event in the 'Event' field, or search for the event using the magnifying glass on the right side of the field.
3. Update the registration form record to create the registration form event record(s).
4. Select the pop-out icon to the far right on an event line to open the registration form event record. Confirm the event information such as description, date, and time has been copied correctly from the group event. Adjust information as necessary.
5. On the registration form event record, set which action type registrants will use to sign up for the event.
6. On the registration form event record, configure ticket information.
7. Update the registration form event record to save the event form configuration.

Group Events

The screenshot displays the 'Veracross: OLD DEMO' interface for a group event. The main content area is titled 'GENERAL' and contains several sections:

- Event Details:** EVENT TYPE (Field Trip), DESCRIPTION (Maine Lobster Festival), START DATE (07/28/21), END DATE (08/01/21), START TIME (6:00 am), END TIME (9:00 pm), CONTACT PERSON (Fir, Balsam).
- Classification:** SCHOOL LEVEL (All School), GRADE LEVEL (None), CAMPUS (None).
- Groups:** PRIMARY GROUP (None), # GROUP MEMBERS (222).
- Location - Internal:** INTERNAL LOCATION RES... (<None Specified>).
- Location - External:** ORGANIZATION (None), MAP, DIRECTIONS FROM SCHO..., DIRECTIONS HOME, LOCATION (Rockland Harbor, Maine).
- Logistics:** CLASS DEPARTURE TIME, CAMPUS DEPARTURE TIME, VENUE DEPARTURE TIME, CAMPUS RETURN TIME, TRANSPORTATION (N/A).
- Student Attendance:** MASTER ATTENDANCE ST... (Not Expected), CLASS ATTENDANCE STA... (Absent - Excused).
- Visibility:** PUBLIC (YES), PARENTS (YES), STUDENTS (YES), STAFF/FACULTY (YES), ALUMNI (NO), GROUP MEMBERS (NO).
- Communication:** EMAIL PARTICIPANTS (Send Email), EMAIL PARENTS (Send Email).
- Event Registration:** ONLINE SIGN UP (checked).
- NOTES:** The 11th grade class has been studying the great state of Maine for the past 4 months. As part of the culmination of this unit, the class will be taking a field trip to the Maine Lobster festival. The festival runs from July 30th to August 3rd. Check out more at ca...

The left sidebar contains a navigation menu with the following categories:

- GENERAL
 - General
 - Logistics
 - Communication
 - Student Attendance
 - Resources
 - Groups
- PUBLISHING
 - Publishing
 - Classification
- EVENT ATTENDANCE
 - Event Attendance
- OTHER
 - Volunteer
 - Recurrence
 - Other
 - Files
- EVENT REGISTRATION
 - Tickets Sold
 - Event Registration Forms
- REPORTS
 - Group Members
 - Class Attendance
 - Name Tags

Event forms are built from group events previously added in the system. Schools will go through the process of adding their group events per usual and then, only if they would like to create sign up forms for this event, they will attach it to a registration form record. All configuration for the online event registration form is then conducted from the registration form event record.

When a group event is associated with an online registration form, the "Online Sign Up" field on the General tab of the group event record is selected automatically, indicating this event is being used on a registration form. A link to the registration form will also be available on the Event Registration Forms tab.

Group Event Configuration for Parent/Student Registration Type

When setting up group events for registration forms with the intended audience of parent/student, all veracross with the potential to attend the event must be invited to the group event in order to appear on the online form. First add the student group or school level using the Groups tab on the group event record. Then change the "Attendance Taken" field on the Attendance tab to "Yes - Default to Invited." This will generate attendance records for all students in the chosen group. When parents of students in that group register their child(ren) through the online registration form, they will be presented with registration options for all their children eligible to attend the event. See more about parent/student registration.

Event Listing

The only step of event configuration that happens outside the context of the registration form event record is the event display settings. Schools can choose between two display options for how events are listed on the event sign up page: standard and consolidated. The standard event(s) listing displays events in individual sections on the form, each with their own action type. The consolidated events listing is used in conjunction with the action type “Multi Date (consolidated only).” It is only for events in which the registrant can select from a list of possible dates and times, such as campus tour times. Although each group event is created separately and associated with the form to the registrant the events will appear as one dropdown selection option for registration.

See more about [standard and consolidated event listings](#) in the Form Configuration article.

Event Configuration

The screenshot shows the 'GENERAL' configuration page for a registration form event. The event is titled '6am-9pm - Maine Lobster Festival - 11'. The description is 'Maine Lobster Festival Five-Days'. The event date is '07/28/21' and the event time is '6:00 am'. The contact email address is 'erica.street@breuer.com'. The action type is 'Multi Ticket' and the status is 'Enabled'. The number of tickets sold is 2.

Type	Description	Rate	Donatic Placehc	Total Quantity	Maximum Quantity Per Registration	Discount Code	Sort Key	Status	# of Tickets Sold
Normal	Total Trip Cost	\$200.00		123	2		10	Enabled	3
Discount ...	Seniors	\$150.00		50	1	seniors	1000	Enabled	

Each event associated with the online form can be managed and configured individually. Events have different configuration options based on the type of event registrants are able to sign up for. For example, a registration option for a parent signing their child up for a school field trip has different configuration needs than a guest user purchasing tickets for the school’s fall musical. Each event may be configured individually to allow for tailoring of the registration experience per event type. All event configuration is conducted from the registration form event record and includes the following configuration areas:

- Basic Information
- Event Availability
- Event Sign Up
- Ticket Sales & Question Summary

Basic Information

All group event information such as date, time, and description is copied from the group event to the online form. Schools have the option to update any information that they would like. This will not change the details on the group event record, but simply update the event text on the online form.

The email address for the contact person specified on the group event record is also copied from the group event. On the online form, an envelope icon is visible. Registrants may click on this icon to view contact details. Clicking on the email address opens a new message in the schools email provider with a pre-populated subject line “Regarding the Name of the Event.”

Further information can be communicated about the event using the “Detail” text box. Detail notes appear on the registration page of the form under the basic event information such as time and description. Event details can include such information as explanation of payment, location details, event agenda, etc.

Event Availability

Capacity

Schools can set a capacity level for the event using the “maximum capacity” field. Capacity refers to the total number of spaces available for the event. As registrants approach the capacity limit, an error message will occur indicating how many spaces are left for the event. Once the event has reached it’s capacity, it will automatically close the registration. Available capacity is calculated based on the maximum capacity setting on the registration form event record and the number of “confirmed” attendees. A confirmed attendee is someone who has completed the registration process, has an attendance status of “confirmed,” is invited to the event, and indicated some form of payment (if payment is applicable to the event).

Schools can also set limits on the total quantity of tickets available at a particular rate. Once a ticket quantity has been sold out, the rate option will no longer be available. The event will still be open for registration if the form contains multiple tickets. Remaining ticket are calculated based on the submission status of the ticket (i.e. complete or incomplete) and totaled by the quantity requested. Payment status also factors into the quantity remaining calculation to account for registrants who may pay later, pay in cash, etc.

Checks for Available Capacity

Online Event Registration allows simultaneous submissions by multiple registrants at one time. Because of this, available capacity is checked multiple times during the registrants sign up process to ensure their ticket quantity is still available by the time they get to the confirmation step. Available capacity is checked three times during event sign up. The first occurs when the registrant arrives at the event sign up page. If capacity is already exceeded a green banner replaces the sign up page,

indicating registration for this event is closed. The second capacity check occurs when the registrant selects the event they would like to attend. If they have selected a quantity that is more than the available capacity they will be notified of the remaining spaces available and can adjust their registration accordingly. The third and final check occurs when the registrant confirms their registration. If during the time the registrant began the registration process another user has signed up and completed their event registration which now causes the previous registrant's sign up to exceed the maximum capacity, the registrant will be redirected to the event sign up page. The total remaining spaces will display to the registrant so they can adjust their sign up accordingly.

Status

The status determines whether the event is enabled or disabled for use on the form. It is possible that a form might contain multiple events and one may need to be closed to registration before the other. A school can disable that event to remove it from the form without disabling the entire form. Event registration will still be open for the enabled event(s).

Event Sign Up

Action Types

Action types determine how the registrant will sign up for the event. Action types are event specific, which means if the form contains multiple events each event can have its own action type configured to allow varied sign up options. Sign up options should be chosen based on the type of event. Some events will require a quick sign up in which registrants simply check whether they are attending. Other events will require the purchasing of tickets to confirm their registration.

Each action type has various text configuration options which should be used to make the registration process as clear as possible for registrants. These include display and label overrides. Most important is the text override for action type labels. This is the text inside the grey box and is controlled by the "Action Label Override" field. Schools can set their own text inside the grey box so it most accurately reflects what value needs to be captured for that sign up. The default label is dependent on the action type selected. For example, the "Quantity" action type's default label is "Qty" and the checkbox action type is "sign up." Schools may want to override this label to indicate exactly what quantity registrants are selecting (i.e. number of people, number of tickets, etc.).

Schools can also override the action detail for certain action types. The action detail is the text that appears to the left of the action type section. This text is controlled by the "Action Details Override" field. Schools can include text here for the action types "checkbox" and "quantity." Multi ticket and multi date have their own configuration settings. Text included in the "Action Details Override" will replace any text to the left of the grey selection box, including rates.

The following action types are available for registrant sign up:

- **Check Box:** the registrant indicates their intention to sign up for the event by selecting the checkbox.
- **Quantity:** the registrant indicates their intention to sign up for the event by selecting the quantity value from a dropdown menu. Quantity can be anything from the number of tickets to number of people attending the event. Schools can set a limit to how many a registrant can select at one time (e.g. how many tickets they are able to purchase in one registration).
- **Multi Ticket:** multiple ticket options at various rates are available for registrants to select. All ticket options will be listed as separate quantity dropdowns.
- **Multi Date (consolidated only):** the registrant selects from a dropdown list the time and day they would like to attend. *Note: this is for consolidated events only. The dropdown list is generated from each group event associated with the online registration form.*

See the [Common Form Configuration Scenarios](#) article for more information on when each of these action types should be used.

Ticket Configuration

Type	Description	Rate	Donatic Placeh	Total Quantity	Maximum Quantity Per Registration	Discount Code	Sort Key	Status	# of Tickets Sold
Normal	General Admission	\$10.00		100	5		1000	Enabled	✘
Normal	Reserved Seat Admission	\$25.00		50	2		1000	Enabled	✘
Discount ...	Senior	\$5.00		50	2	SENIORS	1000	Enabled	✘
Discount ...	Student	\$5.00		50	2	STUDENTS	1000	Enabled	✘

When an event is added to a registration form record a “Default Ticket” is created automatically. This is essentially a placeholder ticket that allows schools to enter ticket quantities even for simple sign up events. Tickets are required for **all** action types. For the checkbox action type, use the “Default Ticket” that is created automatically and leave the rate field blank. This will register the checkbox as a ticket without requiring the registrant to actually purchase a ticket. For events that do involve ticket purchasing, schools can edit the “Default Ticket” and include it as one of their own ticket items.

Many events will have as the registration action some sort of a purchase (e.g. purchasing tickets, field trip expenses, etc.). Schools can add rate sign-up options through tickets. Tickets are configured from the input grid on the registration form event record. There are three options for tickets: normal, discount, and donations. The basic configuration is similar for all three, but each type results in a different kind of rate available for sign-up. Forms can have multiple ticket options available for registrant selection. If the form contains more than one ticket selection option, the action type must be set to “multi ticket.”

Common ticket configuration that must be set for all three types include:

- **Description:** the name of the ticket (e.g. general admission). This appears to the left of the rate and action type. A ticket description will only display for events with the action type “multi ticket.” Otherwise, just the ticket rate will show.
- **Rate:** the price of the ticket. This appears to the left of the action type.
- **Total Quantity:** the total number of tickets available at this rate.
- **Maximum Quantity per Registration:** the total amount of tickets a registrant is allowed to purchase during a single registration submission. This will appear as a dropdown menu option with the “Quantity” action type.
- **Sort Key:** the order in which the tickets appear on the form (for multi ticket action type only).
- **Status:** controls the availability of the ticket by changing the status to disabled or enabled. By default, all tickets when first entered are enabled. If a particular ticket rate needs to be removed at any point during registration, change the status to “disabled” to hide it on the form.
- **# of Tickets Sold:** (calculated field) displays the number of tickets sold per ticket type as registrants sign up to attend the event.

Normal

The normal ticket type defines a price or rate for each ticket item on the registration form. When a registrant selects that option for registration, their total purchase price will display in the footer of the registration page.

Discount Code

The screenshot shows a web browser window with the URL 'ss.com/vcsandbox/8-christmas-gala?testing=123#'. The browser's address bar shows 'History 03 > ... Backpack Calendar Veracross Setup'. The main content area features a red banner at the top with the text 'VERACROSS ACADEMY'. Below the banner is a white registration form titled 'Step 1. Select Events'. The form displays the event details: '6:30pm - Christmas Gala' on 'Sat, Dec 20' at '6:30PM'. There are two ticket options: 'General Admission' for '\$10.00' and 'Reserved Seat Admission' for '\$25.00'. Each option has a 'Qty' dropdown menu set to '0'. Below the ticket options is a link labeled 'Discount Code?'. At the bottom right of the form is a blue 'Register >' button.

Tickets may be set up as a reduced rate using the ticket type: discount code. This allows alternate tickets at a lower rate to be available for section for those who know the code. Discounted tickets should be thought of as reduced rate tickets and are essentially another ticket selection option that is only visible if the registrant knows the discount code. When an event is configured with a discount code ticket option the text “Discount Code?” will appear under the standard ticket options. Registrants who know the discount code can click on the link and apply the code. The reduced rate will then become available for them to select for registration.

Discount codes are fixed and configured before the event is open for submission. They are usually applied in a Multi-Ticket scenario and, because discounts are not child-specific, they are not currently suited for scenarios in which a parent needs to sign up their children on an individual basis. Questions intending to gather student information are not enabled when using discount codes, so if needed, collecting the data in an additional questionnaire outside of Veracross is currently the recommended workflow.

Note about Testing: the discount code can only be applied if the registration form is published and open. Before releasing it for registrant sign up, test the form to make sure the discount codes are applying correctly.

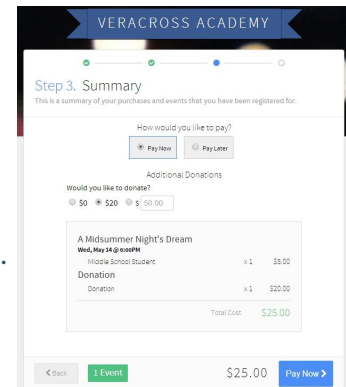
Donations

Schools may opt to collect donations from the online event registration form at the time of registration. A donation section is added to the summary page of registration when a donation ticket type is added.

Schools can provide registrants with one donation option or multiple giving options by adding additional donation tickets in the ticket input grid.

Each donation rate giving option displays as a radio button to registrants.

By default, a \$0.00 button option is included for registrants whenever any donation ticket is entered. To allow registrants to submit their own donation amounts, enter a donation ticket with the rate of \$0.00. This will display an open textbox in which registrants can enter the amount they would like to give.



The screenshot shows the 'Step 3. Summary' page for Veracross Academy. It includes a 'How would you like to pay?' section with 'Pay Now' and 'Pay Later' options. Below that is an 'Additional Donations' section with a 'Would you like to donate?' question and radio buttons for '\$0', '\$20', and '\$50.00'. A table lists items: 'A Midsummer Night's Dream' (Middle School Student) for \$8.00 and a 'Donation' for \$20.00, with a total cost of \$25.00. At the bottom, there are 'Back', 'Event', '\$25.00', and 'Pay Now' buttons.

Instruction text for making donations may be added using the “Donation Instructions” field on the Donations tab on the registration form event record. By default, the instruction text is “would you like to donate?”

Schools can also specify where they would like donations made from the online event to go by assigning it to a campaign and fund. A campaign and fund should *always* be set when a donation ticket is added. This ensures the Development office can process the donation as they would an Online Gift. On the Donations tab on the registration form event record, select from the campaign and fund dropdown to direct donations accordingly. On the ticket input grid, a description of the donation option may be entered to keep track of what the donations are for. This description is internal and will not display on the form.

Donation ticket types are integrated with Veracross Online Giving. When a registrant selects a donation option, their total purchase dynamically calculates in the summary box below. Once payment has been completed an online gift record will be created automatically. Schools can then process the donation exactly like donations made from [Online Giving](#). The notes field on the online gift record contains “Event Registration Donation” so the donation office knows where the gift originated from.

Important Note: only schools with the Online Giving application can integrate a donation ticket with Online Event Registration. If you are interested in this feature, contact your Account Manager for more information on Online Giving. Also read the [Online Giving documentation](#).

Ticket Sales & Question Summary

Tickets Sold

As registrants sign up to attend the event, the total number of tickets sold calculates in the “# of Tickets Sold” field on the Registration Form Event record. The number of tickets sold is also tracked per ticket type in the ticket input grid. Schools can use these two calculated fields to keep track of the capacity level of the event and maintain a record of the tickets sold per ticket type over time.

Question Summary

Answers for all questions captured through the “extra questions” step for the event are tracked and stored as a CSV file. Schools can download the CSV file from the Registration Form Event detail screen by clicking on the link in the “Question Summary” field.
