



MinistryPlatform

## Online Event Registration

A guide to set up and manage online registrations for event participants & volunteers

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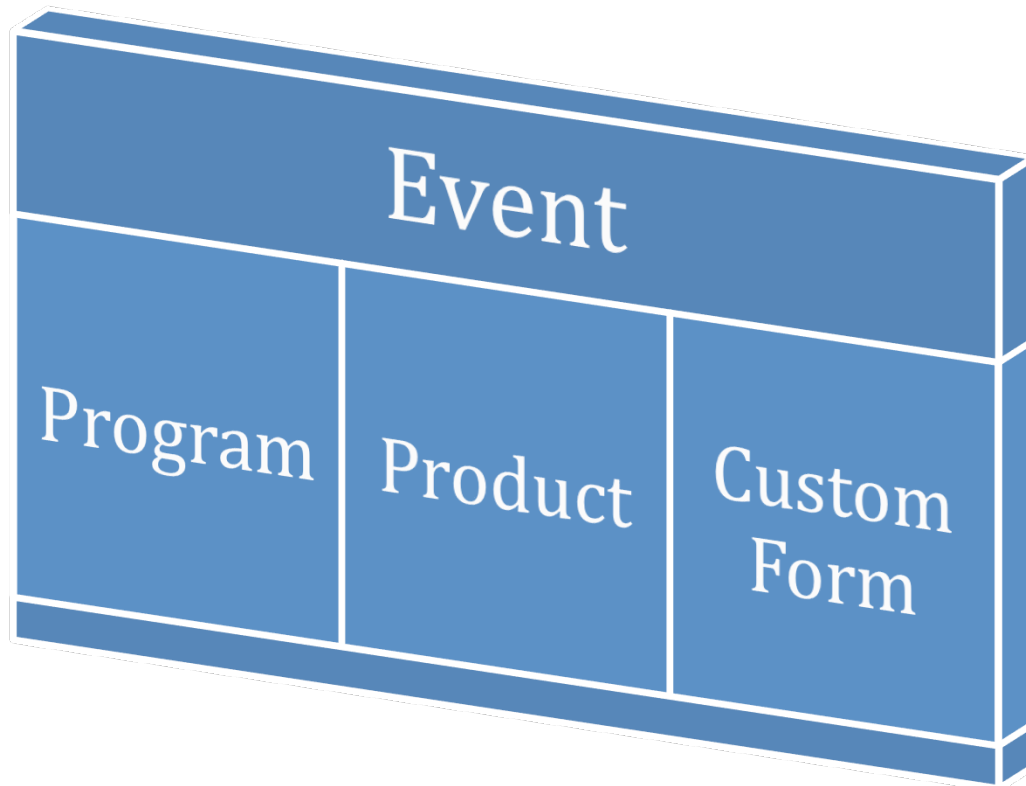
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## Why use online registration?

MinistryPlatform and the Public Portal (the Portal) application offer an integrated online registration solution. This solution allows users to create an event within MinistryPlatform that can appear on your church's public calendar on the Portal and enable congregation members to sign up and if necessary, pay for an upcoming event. This information is then captured within MinistryPlatform where a host of tools and options make event attendee management simple.

## Building an Online Registration Form

When building an online registration event in MinistryPlatform it is important to note the three areas of the system that support the event. These areas should be updated or created BEFORE creating an event, as they will support the event once it is created.



### Programs

All online registration events are required to be attached to a program. Any online registration event that is collecting money should be attached to a program where the account number fields are filled in appropriately. This will ensure that the payments collected from registrations go to the appropriate place in your accounting system. The program is what connects the event to the appropriate account number.

## Products

Products hold the amount that should be charged for attending an event. All online registration events require a payment. If the event is free, then the payment amount will be set to “\$0.00.”

## Product Option Groups

Often multiple price options are needed when creating an event. This can be managed through creating a payment with payment options. The base price (payment) can be set to 0.00 with the option prices indicating the full amounts for each option or the base price can be set to the basic price with the payment option amounts being optional and offer additional items, such as a book.

## Custom Forms

MinistryPlatform will collect Name, phone, email and (optional) physical address for any event. If other information is required it can be added to the event through the creation of a custom form. Custom forms can collect just about any piece of information. This information can later be viewed from within MinistryPlatform or exported to a .csv file. A custom form is NOT required to create an online registration event.

## Using the Parts

It is important to realize that the program, custom forms, and payment can be used for more than one event. It is often helpful to think of these three pages as “event building blocks.” They can be used within various events without a need for duplication. For instance, a different zero dollar (free) payment is not needed for every free event created. One free Payment can be created and used for every free event created. Often a program such as “Women’s Bible Studies” (as long as the account number is appropriate) can be used for every woman’s Bible study event created, year after year. A simple custom form that may include a birth date and grade field may be added to every youth event created.

## Events

The event holds the program, custom form, and payment together. It also holds the specific details of an event, such as the time and date of the event. Events are very dynamic records; there are various fields ranging from details, online registration options, check-in options and even some accounting fields. When creating an event for online registration it is important to be aware of what each field is and how it relates to other pages within MinistryPlatform as well as what fields are visible on the public event page on the portal. Once the event is created, most systems have a process that requires the user to “submit” the event for approval. There is an administrative role that approves the event in order for it to appear on the public calendar.

## Step-by-Step Application

For this guide, an event will be created as though it is completely new, and no program, custom form, or payment option already exist for it. When creating events in real-life scenarios one or all of these parts may already exist and searching for them before creating is highly recommended. If a program or form exists that is similar, often copying and editing the copied record is the simplest way to create the new record. Whether creating, editing, or double checking that

a program, product or custom form exist, it is recommended that all fields are checked to ensure that they contain appropriate information. It is important when naming Programs, Forms, and Products to realize that these three pieces may be used for more than one event. Thus names that describe what they are, rather than the Event they were first created for is recommended.

### Creating a Program

1. Click on “Programs” under the “Ministry & Groups” section
2. Click on “New”
3. Fill out the following fields as appropriate: (Bolded fields are necessary to fill in for online registration purposes)
  - a. **Program Name** – Should be an appropriate, succinct name as programs connect to many places within MinistryPlatform. Usually named for programs at your church such as Women’s Bible Study.
  - b. **Congregation** – A Portal user can filter Events by Congregation
  - c. **Ministry** – Connects the program to the appropriate Ministry. The public portal will also filter events based on the Ministry.
  - d. **Start Date** – Appropriate start date for the program.
  - e. Tax Deductible Donation – This field determines various stewardship reports.
  - f. Statement Header – Will display on contribution statement reports
  - g. **Account Number** – Fill in Appropriately according to your accounting program.

NOTE: Depending on your accounting program you may have extra fields that should be filled in to ensure proper data transmission.
4. Ensure that all appropriate fields are completed.
5. Click on “save”

### Creating a Product

1. Click on “Products & Payments” to expand this section
2. Click on “Products”
3. Click on “New”
4. Fill out the following fields as appropriate:
  - a. Product Name-Should be an appropriate, unique name, as it appears in various drop-down lists within MinistryPlatform. It does not appear on the Portal.
  - b. Description-Helpful so that users do not create a similar product twice.
  - c. Base Price-Amount required for all registrations to pay. If you are planning on creating an option group, you may want to set this as \$0.00 or the lowest price option.
  - d. Deposit Price-If you want to allow deposits fill in this field with the appropriate amount. (Note any deposits made will be applied to the total amount due, rather than in addition to the total amount due.)
  - e. Active-Makes this product available to users to attach to events.
  - f. Price Currency-Choose appropriate currency type.
5. Click on “Save”

### Creating a Product Option Group

Note: Product Option Groups are only needed if more than one price needs to be charged or if the registrants need to be added to groups and the functionality of the products-to-groups option is desired.

1. Click on “Products & Payments” to expand this section
2. Click on “Product Option Groups”
3. Click on “New”
4. Fill out the following fields as appropriate:
  - a. Option Group Name-Fill out appropriately, this text will appear as the header above the option group on the event registration.
  - b. Product-Select the appropriate product to connect the option group to. (Product should have been created in “Creating a Product.”)
  - c. Description-Helpful so that users do not create a similar product twice.
  - d. Mutually Exclusive-If “Yes” is chosen, the user will only be able to pick one of the options.
  - e. Required-Forces the user to chose at least one option (or one option if “Mutually Exclusive” is set to “yes”.)
  - f. Note Label-If you would like the user to be able to add an optional note for each option. The text inputted in this field will appear above the text box on the payment option.
5. Click on “Save”
6. In the “Option Prices” sub-navigation pane click on “New” to add an Option Price.
7. Fill out the following fields as appropriate:
  - a. Option Price-Amount to collect
  - b. Option Title-A simple title, should be descriptive for the portal user to understand what they are purchasing.
  - c. Active-Set to Yes if the option should be available to users
  - d. Qty Allowed-Number of products a portal user can purchase.
  - e. Add to Group-When this option is chosen by a user they will be added to the group specified when they complete their registration.
8. Click on “Save”
9. Add more option prices as needed.

### Creating a Custom Form

1. Click on “Custom Forms” to expand this section
2. Click on “Forms”
3. Click on New
4. Fill out the form following fields as appropriate:
  - a. Form Title-A simple, unique title.
  - b. Instructions-This field will appear to users as they register.
  - c. Get Contact Info-When set to “Yes” the form will collect the user’s name, phone, and email as required fields.
  - d. Get Address Info-When set to “Yes” the form will collect the user’s physical address information as optional fields.
5. Click on “Save”

### Adding Fields to the form

1. Open the form just created in “Creating a Custom Form”

2. In the “Fields” sub-navigation panel click on “New”
3. Fill out the following fields as appropriate
  - a. Field Order-Must be a number. Will determine ordering of questions on form. Can be used to re-arrange fields on the form. It might be helpful to only use odd numbers to begin with in order to more easily add forgotten fields later with even numbers. (Note the any information from the “Get contact Info” and “Get Address Info” in the Custom Form section will be added at the top of the form. Any custom fields added will be added after this.
  - b. Field Label-Text that will appear next to the field on the form
  - c. Field Type ID: The type of data to be collected
    - i. Checkbox-Provides a checkbox to check
    - ii. Date-Provides a date field
    - iii. Drop-Down Box-Provides a drop down box with options to choose
    - iv. Instructions-A text field to provide information to the user; does not collect any information
    - v. Memo/Large Text Box-A large text box for paragraph responses
    - vi. Radio Buttons Horizontal-Provides radio buttons (Portal users may pick one with choices placed horizontally)
    - vii. Radio Buttons Vertical-Provides radio buttons (Portal users may pick one with choices placed horizontally)
    - viii. Text Box-provides space for a short response.
  - d. Field Values-If using a “Drop Down Box” or “Radio Buttons” list options to choose from separated by line breaks (hitting enter/return).
  - e. Required-Requires the Portal user to answer the question before form will be accepted.
4. Add more fields as appropriate to collect all needed information.

### Creating an Event

1. Click on the “Events & Facilities” section
2. Click on “Events”
3. Click on “New”
4. Fill out the following fields as appropriate (Note bolded fields should be filled out for an Event with online registration.
  - a. **Title**-Actual event or study name. Will appear on public event calendar.
  - b. **Event Type**-Choose the appropriate event type.
  - c. **Congregation**-Choose the appropriate campus. Filtering is available by campus on the event public portal.
  - d. **Location**-Choose the appropriate location.
  - e. Meeting Instructions- Fill out with any special instructions.
  - f. **Description**-This will appear on the event page on the public portal.
  - g. **Program**-Choose the appropriate program. In this example, it was created in “Creating a Program” above.
  - h. **Primary Contact**-Admin overseeing the event
  - i. Participants Expected-For use if using MinistryPlatform for event management.

- j. Minutes for Setup-For use if using MinistryPlatform for event management.
  - k. **Event Start Date**-Beginning date and time of event or first event in a series of reoccurring events.
  - l. **Event End Date**-End date and time of the event or the first event in a series of reoccurring events.
  - m. Minutes for Clean-up-For use if using MinistryPlatform for event management.
  - n. Cancelled-Set to "Yes" if the scheduled event gets cancelled.
  - o. Approved-Will be set to "True" once the event manager approves the event.
  - p. **Visibility Level**-Set to Public or Staff & Church to allow anyone on the public portal to view the event.
  - q. Featured on Calendar-Some 3<sup>rd</sup> party applications will use this field
  - r. **Online Registration Product**-Choose the appropriate Product. In this example, the product was created in "Creating a Product" above.
  - s. **Registration Form**-Choose the appropriate custom form. In this example, the custom form was created in "Creating a Custom Form" above.
  - t. **Registration Start**-Date for registration to begin
  - u. **Registration End**-Date for registration to close
  - v. **Registration Active**-Must be set to "Yes" If set to "no" the registration will no longer be active or available.
  - w. **Web Approved**-Will not be set to "yes" until the web event manager approves the event.
  - x. Allow Check-in-Set to yes if you would like to enable check-in for this event.
  - y. Ignore Program Groups-If set to no, those participants in groups associated with the program will be able to check-in.
  - z. Prohibit Guests-If set to yes, only those participants who are registered or in groups associated with the event will be able to check-in.
  - aa. Early Check-in Period-Minutes before the event start time that check-in will become active. If not filled in, the default of 60 minutes will be in effect.
  - bb. Late Check-in Period-Minutes after the event start time that check-in will become inactive. If not filled in, the default of 30 minutes will be in effect.
  - cc. Parent-Parent Event
  - dd. Priority-Choose the appropriate priority
  - ee. On connection Card-If set to yes, the event will appear on the Connection Card Tool.
  - ff. On Donation Batch tool-If set to "Yes" the event will appear on the donation batch tool.
  - gg. Project Code-Available for some churches for their accounting software.
  - hh. External Registration URL-If a URL is inserted into this field the "registration" button on the public portal will direct to this URL.
5. Click "Save"



6. Click on the “Submit” verb at the top to submit the event to the Event Manager to approve. The event will not appear on the public portal and be available for registration until the appropriate managers approve the event.

### **Submit Event for Approval**

Once the event is saved it needs to be submitted for approval.

1. Click on “Submit” from within the open event.

## **Event Approval Process**

When MinistryPlatform is deployed, a process exists to manage groups. This process is triggered whenever an event is created or the day or time is changed. Once the user assigned as the Event Coordinator approves the event, it will be viewable on the public portal event calendar. This process is called “Event Approval” and is found on the “Processes” page within the System Administrator section of MinistryPlatform.

### **To update the Event Approval Process Manager**

1. Click on the “System Administrator” section
2. Click on “Processes”
3. Click on “Edit”
4. Edit the “Event Manager” field to change the Event Manager to the appropriate person at the church.
5. Click on “Save”

## **Recurring Events**

Many ongoing events occur on regular intervals. Using the “recurring event” option when copying an event can create these events. After a recurring event has been created, when editing a singular event in the series the system will prompt the user to apply the change only to the current event or apply it to all future events. When creating recurring events, it is best to create the whole series from the beginning to end and then delete any dates that are not applicable because for various scheduling or holiday reasons.

### **To Create a Recurring Event**

1. Open the event created above in the “Creating an Event” section.
2. Click “Copy”
3. Click “Select Reoccurrence Pattern”
4. Select the appropriate frequency of the event
5. Select the appropriate day of the week
6. End By Time – Last day of meeting
7. Click “Ok” on the “Recurrence Pattern” Dialogue box
8. Click “Ok” on the Copy Record Dialogue box
9. Close the event

### **To Delete Event Records**

1. Search for the newly created event
2. Select any dates that may need to be deleted

3. Change your selection to “Currently selected”
4. Click on Delete
5. Select “Delete” or “Un-assign” on each option.
6. Click “ok”

### Submitting the event for approval.

Although it is possible to open each record in the recurring series, it is faster to submit all records at once from the “Home” page.

1. Click on “Home”
2. Select all of the tasks related to events (can easily be accomplished by searching for the term “event”
3. Click “Complete”
4. Ensure the “Submit all records” radio button is selected
5. Click “OK”

NOTE: Any event that has been created will generate a “task” for submission. Even if the event was deleted the task will still remain. It is usually easiest to simply submit this task rather than find the task to delete it. Submitting the task will not affect the event or any instances of the event.

## Opportunities

Opportunities can be created within MinistryPlatform for both the Connection Card tool and the public portal’s “Opportunity Finder” page. The Opportunity page controls various information about the Opportunity and can tie the Opportunity to various places throughout the system. Opportunities can be assigned to programs, events, groups, and roles.

Often an Event requires specific volunteers. It is possible to connect volunteer opportunities to specific events. When this is done, a “Volunteer” button appears on the event page on the public portal. When a Portal user clicks on this button they are taken to the opportunity finder with the opportunities connected to that event displayed. The Portal user can then choose an opportunity to sign-up for. To add opportunities to an event, update the “Event” field on the opportunity. Opportunities can also include Custom Forms to gather more information. By default an opportunity without a Custom Form will gather the respondents first and last name as well as their email and a phone number.

### Attaching an Opportunity to an Event

1. Click on Opportunities
2. Click on New
3. Fill out the following fields as appropriate
  - a. Opportunity Title-Will appear on the Opportunity Finder
  - b. Description-Should give a brief overview of the opportunity
  - c. Group Role-Attach the appropriate role
  - d. Program-Choose appropriate program. (Note the program will dictate the “Ministry” the Opportunity appears under.)
  - e. Visibility Level-Determines who can view the Opportunity
  - f. Contact Person-Choose the appropriate Contact
  - g. Publish Date-The date the Opportunity will appear on the public portal

- h. Duration in Hours-The amount of time the volunteer will be required to serve.
  - i. Add to Group-If a group is listed in this field the person will be added to this group automatically with the Group Role set above. This will only occur if and when the person who responds is cleared to serve and a user updates the Placed field on Response record to "yes".
  - j. Add to Event-When this field is filled in a "Volunteer" button will appear on the Event page of the Public Portal
  - k. Required Gender-Fill out if a specific gender is required
  - l. Minimum Age-Fill out if a minimum age is required
  - m. Minimum Needed-Fill out appropriately
  - n. Maximum Needed-Fill out appropriately
  - o. Letter Body-Appears in some reports related to Opportunities
  - p. Letter From-Appears in some reports related to Opportunities
  - q. On Connection Card-Set to yes if the opportunity should be available when using the Connection Card Tool.
  - r. Shift Start-Fill out appropriately
  - s. Shift End-Fill out appropriately
  - t. Custom Form-Attach an appropriate custom form. (If a form has not been created yet see the above "Creating a Custom Form" to create one.)
4. Click on "Save"

## **Adding registrations manually through MinistryPlatform**

Often there are situations where for various reasons an Event Participant is not able to complete the registration for an event online. There is a specific tool to enable adding registrations that have been collected outside of the public portal. The "Add a Payment" tool enables a MinistryPlatform user to input payment information as well as custom form information for any registrations that were collected outside of the online registration option. This tool can also enable a MinistryPlatform user to input the remainder of a payment when the online user pays only the deposit, or when a scholarship is given.

### **Handling offline registrations with a credit card**

Often the easiest way to add a credit card registration is to register the person through the public portal as a guest. This will add the individual to the event, allow any custom form information to be included and send the individual any automated emails that are set up.

### **Handling offline registrations with Cash or Check**

When an individual needs to be registered who is paying with cash or check, often it is necessary to register them from within MinistryPlatform rather than the Public Portal. This is accomplished through use of the Add a Payment tool. This tool can be launched from the Events page or from an open Event record. To use this tool the individual must already be added to the event. If they are not added to the event, add them before launching the tool.

### **Adding a participant to an Event**

1. Click on “Events”
2. Search for the appropriate Event
3. Click on the Event to open it
4. Click on “New” or “Add” in the participant sub-navigation pane
5. Find the participant that needs to be added
6. Add the participant with a “Registered” (pre-event) or “Attended” (post-event) status.
7. Click “Save”

### **To Launch the “Add a Payment Tool” and add the registration**

1. Open an event where a registration needs to be added
2. Click on “Tools”
3. Click on “Add A Payment”
4. Click on the appropriate participant in the “Select a Participant” box.
5. Fill out the appropriate fields in the “Complete Registration Form:” section (This section will only be populated if there is a custom form attached to the event.)
6. If the person who is registered for the event is the same person that is paying, click on the “Use Participant” checkbox under the “Make a Payment” section. (Skip to step 8)
7. If the person who is registered for the event is different than that person that is paying search for the appropriate record who is paying for this person. Then select the appropriate person.
8. Update the “Payment Date” if different than the current date.
9. Enter the payment amount
10. Select the Payment Method
11. Insert the Check Number (if applicable)
12. Click “Submit”

### **Handling offline registrations who are receiving scholarships**

When an individual is receiving a partial or full scholarship the simplest way to handle this is to collect their information and use the Add a Payment tool. Using this tool the scholarship amount can be attributed to a fake “scholarship” contact or to another contact that may be providing a scholarship for the individual.

Partial payments by either the attendee, the “scholarship contact” or another individual can be applied to the event record.

In order to apply payments as scholarship some set-up needs to occur. First a “Scholarship” Payment Type needs to be created if not already created. Second, a “Scholarship Contact Record” should be created to attribute all scholarship payments to.

For more information about the various scholarship options available go to <http://www.thinkministry.com/kb/ministryplatform/processing-scholarship-payments>

### **To create a “Scholarship Contact Record”**

The organization only needs one “Scholarship Contact Record” for all current and future scholarship handling. If this record does not yet exist, create it by following the steps below.

1. Click on “Contacts”
2. Click on “New”
3. Add a Contact called “Scholarship”
4. Update appropriate fields.

(Note it is recommended to use all of the same information for this record as the “Default Contact” included in the database. Open the default contact and ensure that the various fields and households are all the same.”

### **To Launch the “Add a Payment Tool” and add the scholarship registration**

13. Open an event where a registration needs to be added
  14. Click on “Tools”
  15. Click on “Add A Payment”
  16. Click on the appropriate participant
  17. Fill out the appropriate fields in the “Complete Registration Form:” section.  
(This section will only be populated if there is a custom form attached to the event.)
  18. Under the “Make a Payment” section search for the appropriate record who is paying for this person.
    - a. If they are receiving a scholarship from an individual search for the individual.
    - b. If they are receiving a scholarship from the organization, search for the “Scholarship” record.
  19. Update the “Payment Date” if different than the current date.
  20. Enter the payment amount
  21. Select the Payment Method
  22. Insert the Check Number (if applicable)
- Click “Submit”

## **Managing online Registration Events**

Once an online registration has been created and participants have been registered it is important to know how to work with them. Beyond simply knowing how many individuals have been registered other items may need to be addressed. There may be individuals who have not been attached to the “Default Contact” who need to be corrected. There may be custom form information that is required for various other tasks such as small group placement.

### **Understanding Default Contacts**

When an individual registers, MinistryPlatform looks at the registrant’s full name as well as the email address and phone number provided. If the system can match the full name and either the phone or the email, the system will match the registration with the record in the system. If the system cannot find a match in the database the system will create an Event Participant record assigned to the system’s “Default Contact.” These records should then be reassigned to the appropriate record. These records are created when the individual is not in MinistryPlatform or when the information they provided does not match what is in this system. This often happens when there is a typo or the participant provides a cell phone and work email when previously only their home phone and personal email is in the system. Due to this, it is important to review these records

carefully to ensure that they are not already in the system before creating a new record and thus potentially creating a duplicate record. These records can be assigned using the “Assign Participant” tool. This tool will allow a user to assign the participant from within the event record and it will update the information in not only the Event record but also in the Custom Form page. The default record will also need to be updated in the Payment section as often the person paying for the event is not necessarily the same person that is attending the event such as when a parent signs their child up for Vacation Bible School.

#### Matching a registration to a contact using the “Assign Participants” tool

1. Open the Event where a record needs to be Reassigned (will be indicated by a “Default Participant” record)
2. Ensure that the Event is highlighted in the first box
3. Click on the “\*\*\*Default, Contact\*\*\*” record in the second box.
4. Once the Default Contact has been selected the information provided by them will display in the “Notes” section.
5. The tool will then display “Possible Matches” if one of these matches is the appropriate match, click on the “Assign” button next to it. The event participant will be assigned to the appropriate Participant record.
6. If the provided matches are not correct, click on the “Create Participant” button.
7. Fill out the appropriate fields. If more information was collected using “Custom Forms” it may be helpful to look up the correlating form response from this individual to add the information collected to the “Assign Participant Tool.
8. Click on “Create Participant.” This record will now be updated on both the “Event Participant” page and the “Form Responses Page.

#### To Reassign Payment Records

1. Click on “Payments” page under the “Products & Payments” section
2. Change the view to “Reassign Free (\$0)” or “Reassign Not Free” to view all of the unassigned Contacts for free or paid events.
3. Click on one of the records to open it.
4. Click on Edit
5. Click on the pick box next to the “Contact”
6. Choose the appropriate Contact (if the appropriate contact does not exist, use the “Add/Edit Family Tool” to add the Contact to the system.
7. Click on Save

#### Viewing Registrations

The simplest way to know how many people have registered for an event is to go to the event and look at the participants in the sub navigation pane. If the event is ongoing it is recommended to look at the “Event Participants” page as this page will show anyone who has registered for any instance of the event. If the event has been set up to use the “Product Option Group-Group Assignment option” the simplest way to see how many individuals are registered for an event is to look at the groups or groups participants page and search for the group that was assigned.

#### To view individuals on the Events Page

1. Click on “Events”

2. Search for the event by it's name
  3. Open the event.
  4. Note the individuals registered for the event
- Note: This option is not recommended for recurring events as other individuals may be registered for future events in the series

#### **To view individuals using the Event Participants page**

1. Click on "Event Participants" (under the "Participation" heading)
2. Search for the event title
3. Note the number of individuals registered

This is the preferred method for viewing registered participants when an event is recurring.

#### **To view individuals using the Groups page**

1. Click on Groups (Under the Ministry & Groups header)
2. Search for the group name assigned in the product option groups
3. Open the group
4. Note the number of group members

#### **Viewing Custom Form Information**

When an event has a custom form attached to it there are a few ways to view the information provided by registrants. One way to view this information is to view the individuals custom form information from the "All Form Responses" page. Custom views can be created on the "All Form Answers" page to quickly view all of the responses of one question at a glance. There is also a tool specifically designed to export all of the "Custom Form" information as well as the participant's payment and contact information in one .csv file for quick reference.

#### **Viewing information on the "All Form Responses" page**

1. Click on the "All Form Responses" page under the "Custom Forms" section.
2. If necessary Search for the record, event, or form that is appropriate
3. Click on a record to open it
4. Note the form responses in the sub-navigation pane

#### **Viewing information on the "All form Answers" page**

This page shows every answer from every individual. Thus one individual will probably be listed multiple times, once for every question they answered. As a result, this page is often most helpful after an Advanced Search has been created to filter based on the responses to one or two questions per form. For more information on creating an Advanced Search go to <http://www.thinkministry.com/kb/ministryplatform/creating-advanced-search-personal-view>

1. Click on the "All Form Answers" page under the "Custom Forms" section
2. Search for the appropriate event, form or participant
3. View the information

#### **Viewing Custom Form information using the Form Responses Tool**

1. Click on the "Events" page under the "Events & Facilities" section
2. Open the appropriate event record
3. Click "Tools"

4. Click “Form Responses Tool”
5. Choose whether to export “All Records” or “Selected Records” (specify appropriate dates)
6. Click on “Complete”
7. Download the file using the download link provided.