CDM Plus Event Registration

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CDM plus

CHURCH MANAGEMENT SOFTWARE

The power to help you connect your church's **ministry** to its **mission**

CDM+ Event Registration

CDM+ Event Registration can record registrations for any type of event, conference, retreat, or camp. User-defined activities for each event are created to keep track of meals, workshops, material ordered, or any other aspect of the event. Lists, name badges, monies received and due, mailing labels, confirmation letters and a variety of other reports and information are readily available. Total persons registered for an event or an activity can be quickly viewed. If a workshop or meal can only accommodate a limited number of registrants the program can prompt you when such a limit is reached.

Registrations can be tied to individuals in CDM Plus or be maintained independent of the individual records. Tying registration entries to the main CDM Plus Membership database allows you to have a history of events to which someone in the church has participated. The latter option allows the user to enter registrations to an event for persons you do not wish to have in the main Membership database. An event can have both types of registrations.

Registration Menu

To access Event Registration click on **CDM+** on the menu bar and select **Event Registration** or click on the Event Registraton icon on the Tool Bar. This puts **Registration** on the menu bar under which you have the menu items as shown to the left. These are also available through buttons on tool bar:

Events File

Registration Entry

Camps Entry

Family Address Records

Individual Records

Adding an Event

Before entering any registrations, Event Codes must first be established for the various events or camps for which you wish to track registrations.

1- Click on **Registration** on the menu bar and pull down to **Events File** or click on the **Events File** icon on the Tool Bar.

2- Click the **Add** button.

3- Type a code for the Event or Camp you are tracking — up to 5 characters, letters or numbers, or a combination (e.g.--VBS02, CB01, or JRCAMP, etc.).

4- If this is a Camp, click on the check box next to **Camp**.

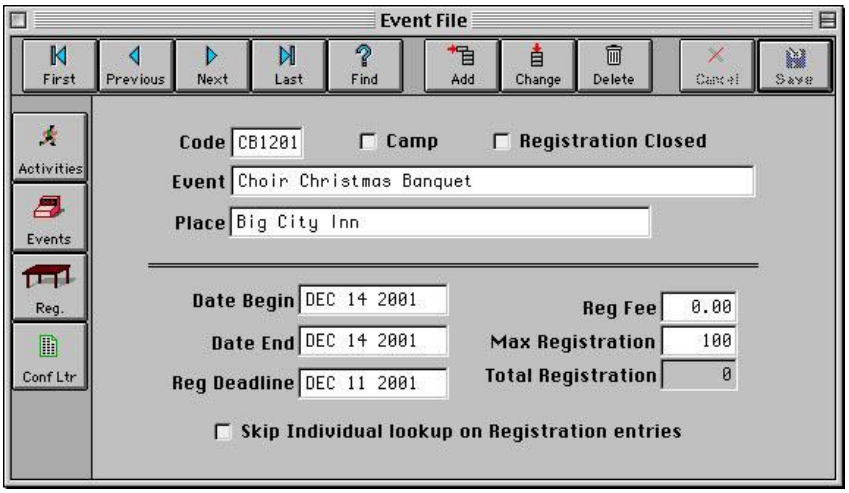
IMPORTANT: Checking the **Camp** box, will provide a camp registration entry window that allows you to record additional information, including the registrant's parent/guardian, age and birthdate.

5- Press the **Tab** key, placing the cursor in the **Event** field. Type the name of the event or camp (e.g.,Choir Christmas Banquet).

6- Press the **Tab** key, placing the cursor in the **Place** field. Type the location of the event or camp.

7- Press the **Tab** key, placing the cursor in the **Date Begin** field. Type the date the event or camp will begin.

8- Press the **Tab** key, placing the cursor in the **Date End** field. Type the date the event or camp will end.



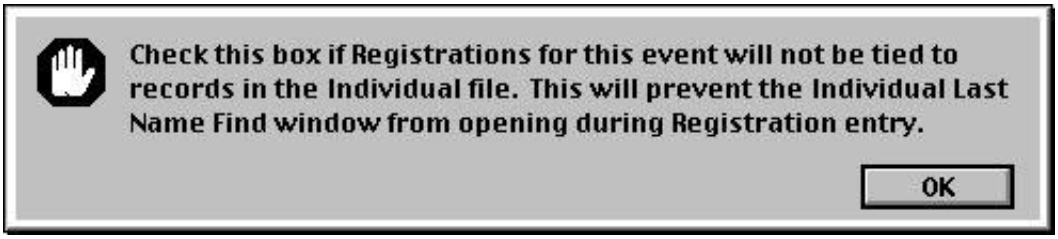
9- Press the **Tab** key, placing the cursor in the **Reg Deadline** field. Type the registration deadline for this event or camp.

10- Press the **Tab** key placing the cursor in the **Reg Fee** field. Type the amount to be paid for registration.,

11- Press the **Tab** key, placing the cursor in the **Max Registration** field. If there is a maximum number of registrants for this event or camp, type the number.

NOTE 7.1: As persons are registered for this event/camp, the total number registered to date will appear in the **Total Registration** field.

12- Turn on the **Skip Individual lookup on Registration entries** checkbox only if you do not want any registrations to this event connected to the address and individual files stored in your CDM Plus Membership program data base. Checking this item brings up the following dialog box:



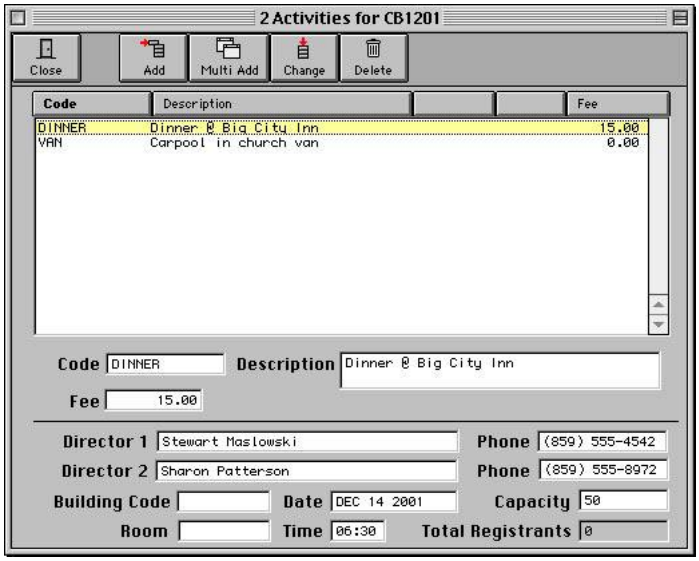
13- Click **OK** or press **Return/Enter** on this dialog box to mark the **Skip Individual . . .** checkbox.

14- If the Event File information is correct, click **Save** or press **Return/Enter**.

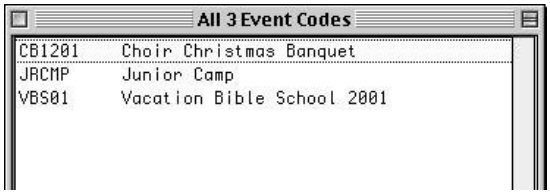
NOTE 7.2: Turn on the **Registration Closed** checkbox once registration for this event is closed or the event is past. This prevents this event/camp from showing up on any list of available events for which registrations may be entered. An unlimited number of closed events/camps may be left in the system and reports can be generated for them. Closed event/camps may also be reopened if necessary.

Special Buttons in Events File

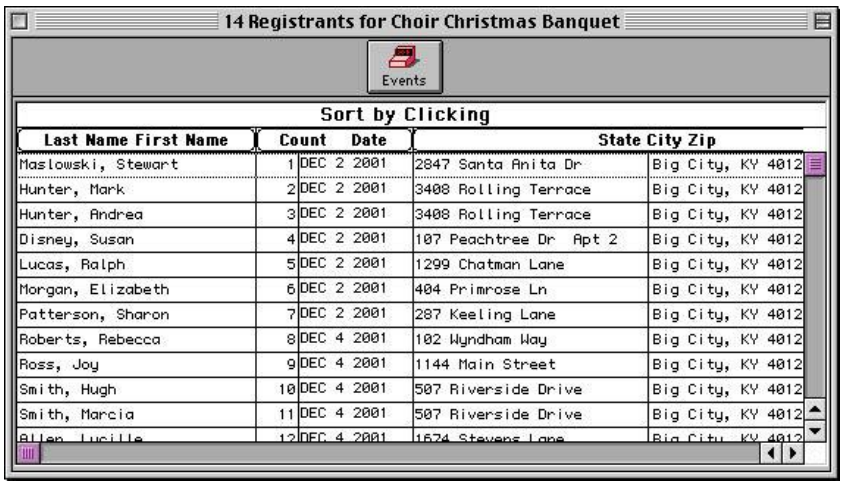
Activities – Clicking the **Activities** button opens a window (shown below) in which you can insert activities related to this particular event and for which persons must be registered.



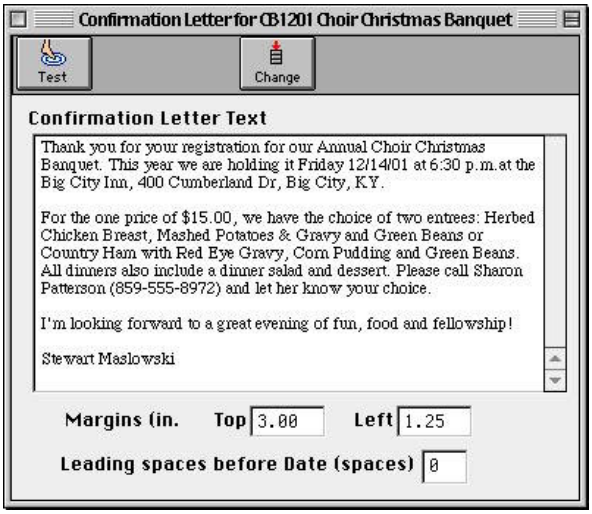
Events – Clicking the **Events** button brings up a list of all events that have been entered in the system as shown below. If the event has been marked as a camp a "C" will appear. If registration for the event has been closed, an "X" will appear. Double-clicking on an Event name will display the **Event File** window for that event.



Registrants – Clicking the **Reg** button displays a list of persons already registered for this event. Double-clicking on a name will display the registration window for that person.



Confirmation Letter – Clicking the **Conf Ltr** button opens a window in which you can set up a **Confirmation Letter** to be sent to the registrants for this event.



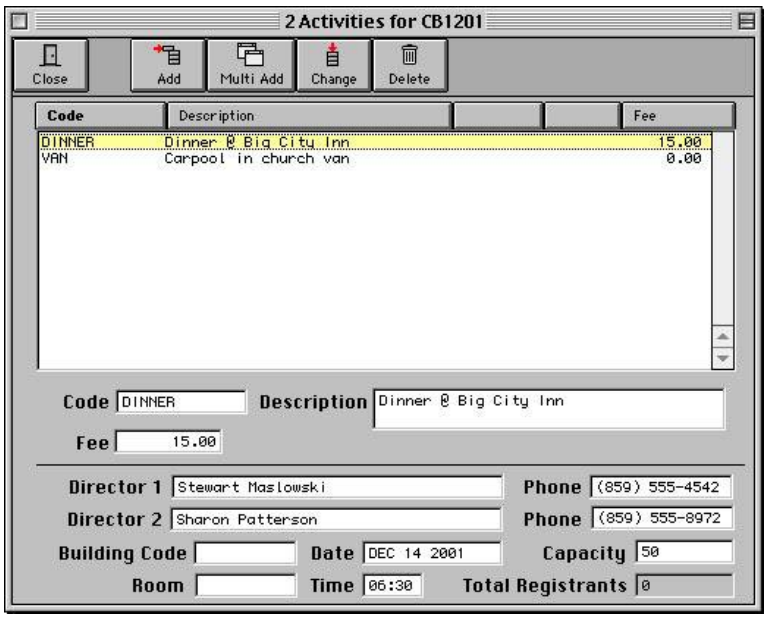
Click the **Change** button at the top of the window and type the body of the confirmation letter along with the closing as shown to the right. Do not include a salutation; CDM Plus will do that for you automatically. **Margins** may also be set here so the letter fits your letterhead and you may also enter leading spaces before the **Date** if you wish for it to be indented.

A **Test** button allows you to check the spacing before printing it on your letterhead.

Entering Activities for an Event/Camp

After entering an event, insert the activities, along with their cost, that are related to this event.

1- Click on the **Activities** button to open the Activities window (shown below).



2- Click the **Add** button. The following dialog box appears:

3- If you wish to copy activities from another event, click **YES**. If not, click **NO**. If you click **NO**, go on to step 6 below. If you click **YES** the following dialog box appears:

4- After clicking **YES** or **NO** on this dialog box, the following dialog box appears:

5- Click **OK** here and a list of available events appears. Double-click the event for which you wish to copy the Activities (and possibly) confirmation letter to this new event. The Activities for the selected event will be loaded as Activities for this new event. If additional Activities are needed, click the **Add** button and continue as described below.

6- The cursor will be in the **Code** field. Type a code for this activity. (e.g., WORKSHOP1 could stand for Workshop #1).

7- Press the **Tab** key to move to **Description**. Type the description of the activity (e.g., Keeping the Romance Alive).

8- Press the **Tab** key to move to **Fee**. If there is a fee for this activity put the dollar amount in this field. If it is free you can type "free" or leave it blank.

The information below is optional and most likely will be used only for camps, but may be used for any event.

9- Press the **Tab** key to move to **Director 1**. If there is a director, type his or her name in this field.

10- Press the **Tab** key to move to **Phone**. Type their phone number.

11- Press the **Tab** key to move to **Director 2**. If there is a second director type his or her name in the field.

12- Press the **Tab** key to move to **Phone**. Type the phone number.

13- Press the **Tab** key to move to **Building Code**. If there is more than one building being used for this event, this should be a code representing the building in which this activity will be held.

14- Press the **Tab** key to move to **Date**. Type the date for this activity.

15- Press the **Tab** key to move to **Capacity**. Type the capacity if there is one for this activity. As registrations are inserted, the system will warn you when the pre-set capacity has been reached. The following dialog box appears during registration entry:

You can add more registrants at that time, but the system will warn you that the previously set capacity has been reached.

16- Press the **Tab** key to move to **Room**. If there is a certain room or room number for this activity type that information in this field.

17- Press the **Tab** key to move to **Time**. Enter the time the activity will take place in this field.

18- Click **OK** or press **Return/Enter**.

19- Repeat this process for each activity needed for this event.

Change and **Delete** buttons on this window allow you to change or delete an activity record.

To change a record, highlight the activity with one mouse click, click the **Change** button, and make the desired changes. Once the record is changed, click **Save** or press **Return/Enter**.

To Delete a record, highlight the activity with one mouse click, click the **Delete** button, and then click **Yes** on the Delete code dialog box.

NOTE 7.3: The **Total Registrants** field will automatically be calculated as you insert registrations. You can open the events file and type the code for this event. Click on activities and all the activities for this event will appear on the top of the screen. Highlight the event and it will show you the number of registrants for this event in the field.

Deleting an Event/Camp

NOTE 7.4: Delete an event/camp only if you want all records related to this event to be removed from the system. If you want an event to remain in the system after the event is over, turn on the **Registration Closed** checkbox on the **Event File** screen. This prevents this event/camp from showing up on any list of available events for which registrations may be entered. An unlimited number of closed events/camps may be left in the system and reports can be generated for them. Closed event/camps may also be reopened if necessary. Events can also be archived out for historical purposes. Select the **Archive** under the **Registration** menu to perform this function. See the **Archiving** section of the CDM Plus Manual for more information on archiving principles.

1- Under **Registration** on the menu bar select **Events File** or click on the **Events File** icon on the Tool Bar.

2- Using the **Next**, **Previous**, or **Find** buttons, locate the Event you wish to delete.

3- Click the **Delete** button. A dialog box will display the following message**: "Delete Current Record?"** Click **Yes** if you wish to delete the event, click **No** if you wish to retain this event.

Adding Registrations for an Event/Camp

Once you have entered an event or camp and its related activities, you are ready to register persons for it.

1- Under **Registration** on the menu bar select **Registration Entry** or **Camps Entry** or click on the **Registration Entry** icon or the **Camps Entry** icon on the Tool Bar.

2- Click **Add**. A pop-up window appears displaying a list of available events/camps.

3- Double click on the event/camp for which you wish to register this person. The **Event Code** for the selected event will appear in the **Event Code** field, with its description to the right.

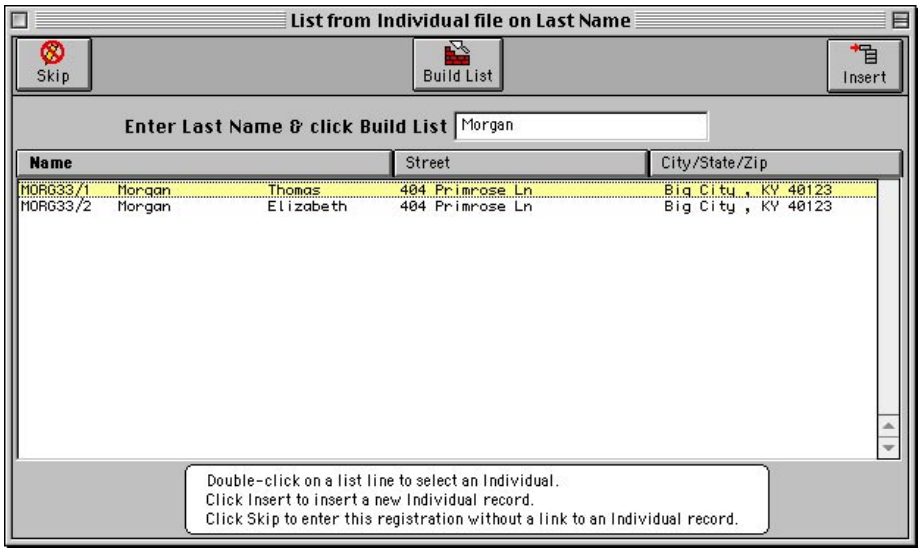
NOTE7.5: If you entered a number in the **Max Registration** field on the **Event File** window and this registratrion exceeds that amount, the dialog box below will appear.

Click OK. You can add more registrants, but the system will continue to warn you that the previously set capacity has been reached.

4- Press the **Tab** key.

NOTE 7.6: If the **Skip Individual lookup on Registration entries** checkbox is checked on the **Event File** screen, this **List from Individual file on Last Name** screen will not appear.

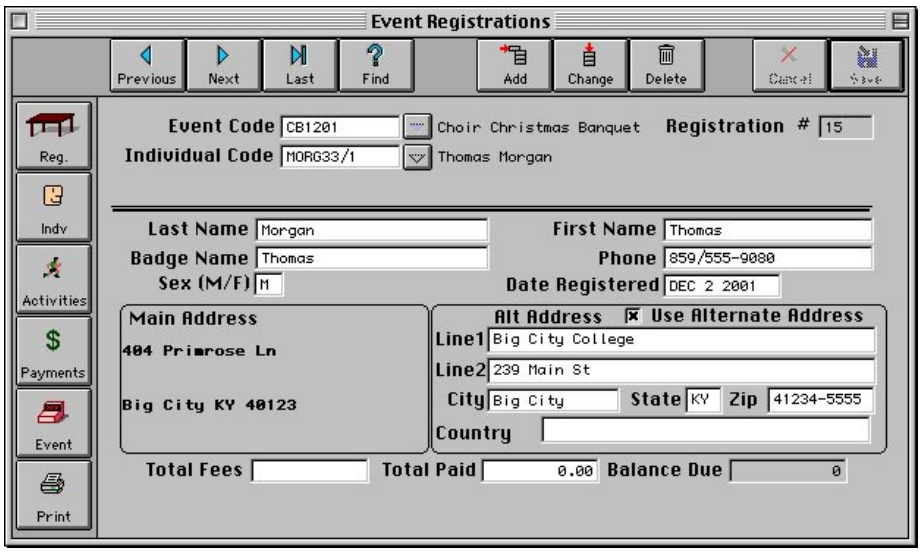
5- The **List from Individual file on Last Name** screen appears. Type the last name of the person you wish to register if you think they are included in your data base of individuals. Press **Return/Enter** or click the **Build List** button to view a list of individuals with that last name.



6- From the **List from Individual file on Last Name** screen, several choices, listed at the bottom of the screen, are available.

NOTE 7.7: If Registrant's name is not in the ***List from Individual file on Last Name*** list, see instructions below entitled **Registrant's name not in the "List from Individual file on Last Name" list**.

7- If you double-click on a name from the list, that name with related address information, will load in the **Event/Camp Registrations** window.



NOTE 7.7: If the address connected to this individual is not the one to be used for mailings related to this event, fill in the **Alternate Address** fields and check the **Use Alternate Address** checkbox.

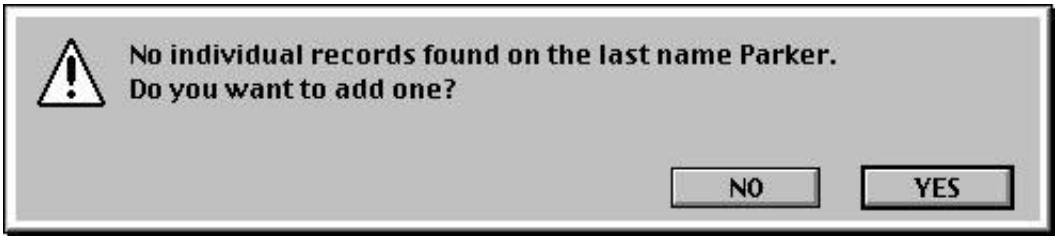
NOTE 7.8: If you clicked the **Skip** button on the **List from Individual file on Last Name** screen, input the name and address information manually for this individual using **the Alternate Address** fields.

8- If this is a camp registration tab through **Birthday**, **Age Next Fall**, and the **Parent/Guardian Information** area at the bottom of the window, filling in the appropriate information

9- Once the data entry is complete and the information is correct, click **Save** or press **Return/Enter** to record this registration.

Registrant's name not in the "List from Individual file on Last Name" list

1- After entering a last name and clicking on **Build List** on the **List from Individual file on Last Name** screen, if the system finds no one with that last name, the following dialog box appears:



2- Click **YES** and the **Family Address Record** screen appears with the desired last name appearing in the **Last Name** field.

3- Tab thorugh the fields, entering the appropriate information for this person. (See the **Adding Family Address Records** section of the Membership chapter of the *CDM Plus Manual*).

4- Click the **Add** button beside the Individuals window in the lower right corner of the Family Address Records window. The **Individual Records** window appears in the **Add** mode. Tab through the fields, entering the appropriate information. After entering the information, click **Save** or press **Return/ Enter**.

5- Now click on the **Register** button . The following dialog box appears:

6- Click **Yes** to register this person. After clicking **Yes** the following dialog box appears:

7- Click **Yes** if this is a camp registration. If you click **Yes** the **Camp Registration** screen will appear displaying available camps. Double-click on your choice and then continue the registration procedure as described above under **Adding Registrations for a Event/Camp**. If this is not a camp registration, but rather another event, click **No**. A list of available Events will appear. Double-click on your choice and then continue the registration procedure as described above under **Adding Registrations for a Event/Camp**.

Deleting a Registration or Camp Entry

1- Under **Registration** on the menu bar select **Registration Entry** or **Camps Entry** or click on the **Registration Entry** icon or the **Camps Entry** icon on the Tool Bar, depending on which type you wish to delete.

2- Click the **Find** button. Select desired **Field** and **Options**, type appropriate **Criteria**, and click **OK** or press **Return/Enter**. Use Next button if necessary to locate exact record.

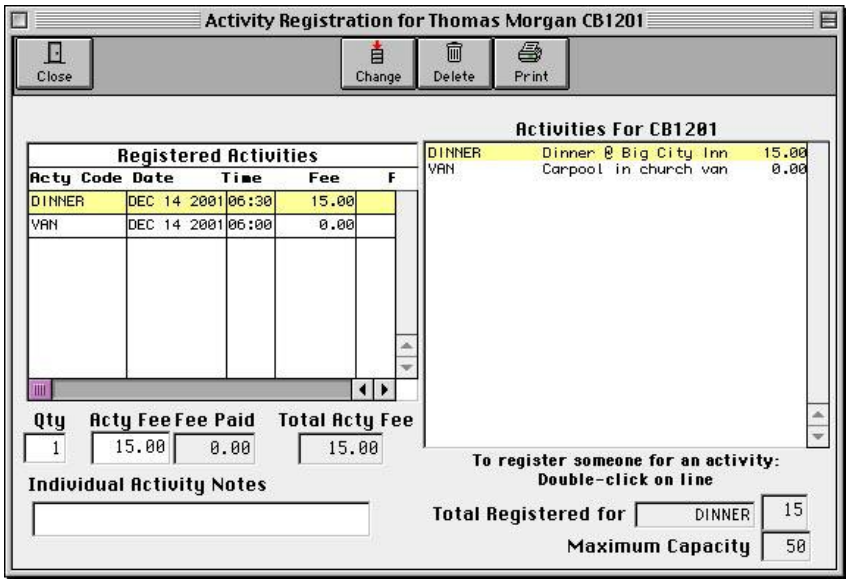
3- Once the desired record is displayed on the screen click the **Delete** button. A dialogue box appears asking "Delete Current Record?"

5- Click **Yes** to delete this entry.

Registering an Individual for One or More Activities of an Event/Camp

Once an individual has been registered for an event/camp, he or she should be registered for the various activities she or he will participate in, if applicable.

1- While on the **Event/Camp Registrations** window, click on the **Activities** button . The **Activity Registration** window appears as shown below.



2- Double click on the activities in which this registrant wishes to participate, moving them to the **Registered Activities** list. The total amount due will be in the **Total Acty Fee** field. This amount may increase as additional activities are added.

NOTE 7.9: The **Change** and **Delete** buttons on this screen allow you to change or delete a particular activity. For example, if this person is to receive a special price for some activity or if it is to be free, you may change the Activity Fee accordingly using the **Change** button. An activity may also be removed from a person's record by using the **Delete** button.

3- After inserting all the activities for this person, click the **Close** button to return to the Event/Camp Registrations window.

4- If you desire, you may add Payments for this record at this time. click on the **Payments** button

and follow steps 5–10 of the instructions below **"Adding, Changing or Deleting Payments."**

Adding, Changing or Deleting Payments

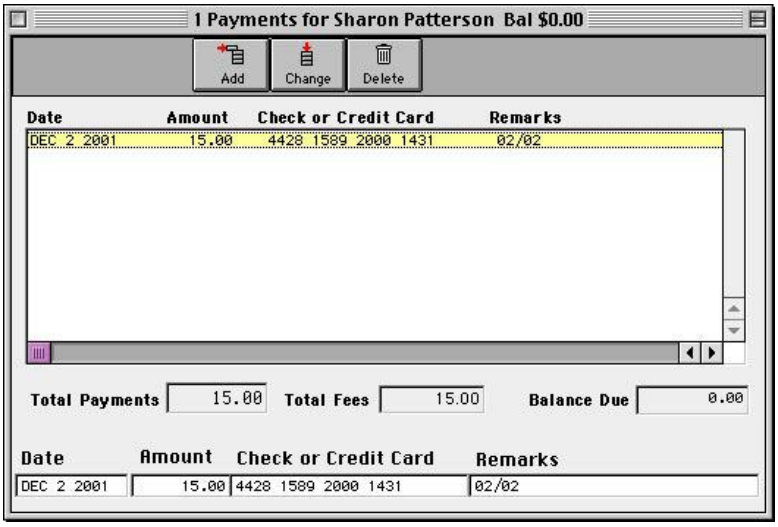
1- Under **Registration** on the menu bar select **Registration Entry** or **Camps Entry** or click on the **Registration Entry** icon or the **Camps Entry** icon on the Tool Bar.

2- Click the **Find** button.

3- Select desired **Field** and **Options**, type appropriate **Criteria**, and click **OK** or press **Return/Enter**. Use Next button if necessary to locate exact record.

4- Once the desired record is displayed on the screen click on the **Payments** button

. The **Registration Payments** window will open.



5- Click the **Add** button.

6- The current date is entered and the amount field is highlighted (the date may be changed if necessary).

7- Type the **Amount** of the check or credit card payment.

8- Press the **Tab** key and type the check number or credit card number.

9- Press the **Tab** key and type or change remarks as necessary.

10- Click **Save** or press **Return/Enter**.

11- Repeat this process for each payment received for this registrant.

12- To close this window click the close box in the upper left corner of the window (Macintosh) or upper right corner (Windows).

NOTE 7.10: To change or delete a payment on the Registration Payments window, highlight the payment and click the **Change** or **Delete** button. After making a change, click **Save** or press **Return/Enter**.

Event Registration Reports

Master Report

This report provides detailed information about each person registered for this event or camp. Included are Name, Address, Phone, Total Fees, Amount Paid, and Amount Due. Totals also appear on this report.

1- Click on **Reports** on the menu bar and select **Master Report**. A pop-up list of available events or camps appears.

2- Double-click the desired event loading the code in the **Event Code** field.

3- Enter the date range desired in the **Date Selection** window and click **OK** or press **Return/Enter**.

4- Send the report to the printer.

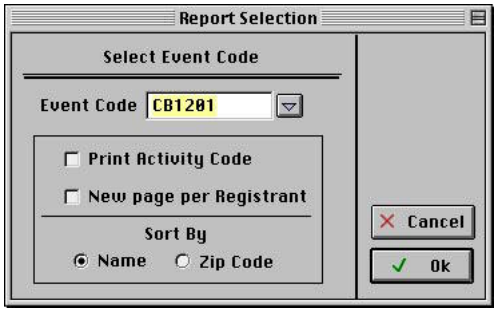
Master Report Detailed

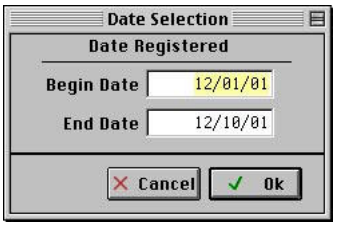
This report provides detailed information about each person registered for this event or camp along with activity information.

1- Click on **Reports** on the menu bar and select **Master Report Detailed.** A pop-up list of available events or camps appears.

2- Double-click the desired event loading the code in the **Event Code** field.

3- Make your selections from the options on the Report Selection and Date Selecton windows. Click **OK** or press **Return/Enter** and you complete each window.





NOTE 7.11: Check the **Print Activity Code** checkbox if you want Activity Codes printed along with their descriptions. Check the **New page per Registrant** checkbox if you want 1 page per person.

4- Send the report to the printer.

Confirmation Letters

Confirmation letters may be generated to send to all registrants. To set up the confirmation letters see the **Special Buttons in Events File** section above and refer to the information about **Confirmation Letters.**

1- Click on **Reports** on the menu bar and select **Confirmation Letters**. A pop-up list of available events or camps appears.

2- Double-click the desired event loading the code in the **Event Code** field.

3- Select the appropriate sort order and font size and click **OK** or press **Return/Enter**,

4- Enter the date range desired in the **Date Selection** window and click **OK** or press **Return/Enter**.

5- Send the report to the printer.

6- After printing the Confirmation Letters, CDM Plus will ask you if you wish to print labels at this time (see **Labels** report description below).

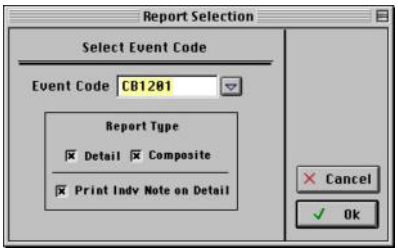
Activity

This report provides a listing of all persons registered for all activities related to a particular event

1- Click on **Reports** on the menu bar and select **Activity**. A pop-up list of available events or camps appears.

2- Double-click the desired event loading the code in the **Event Code** field.

3- Select the desired options under Report Selection by turning the checkboxes on or off.



Detail - lists each person registered for a particular activity

Composite - lists only total number of persons registered for a particular activity

Print Indv Note on Detail - prints information that was added to a specific activity for a registrant

4- Click **OK** or press **Return/Enter**.

5- Send the report to the printer.

Activity Selected

This report provides a listing of all persons registered for 1 or more selected activities related to a particular event,

1- Click on **Reports** on the menu bar and select **Activity Selected**. A pop-up list of available events or camps appears.

2- Double-click the desired event loading the code in the **Event Code** field.

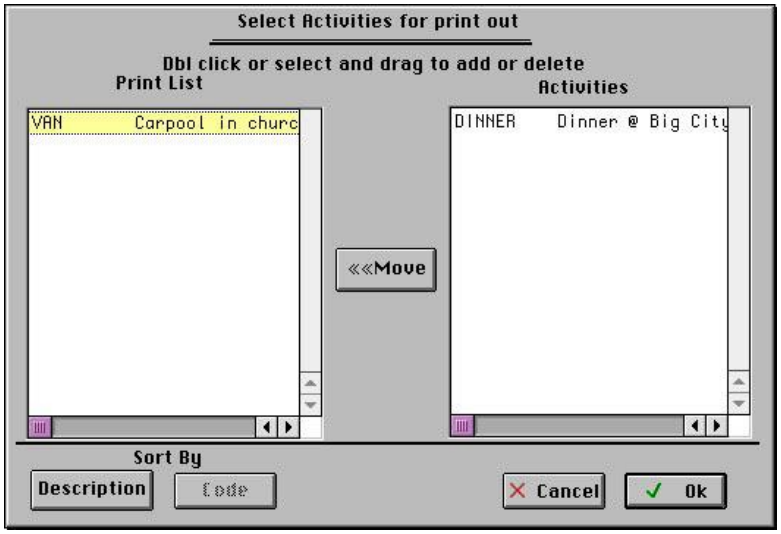
3- Select the desired options under Report Selection by turning the checkboxes on or off. (See A**ctivity** report above.)

4- Click **OK** or press **Return/Enter**. The **Select Activities for print out** dialog box appears.

5- Double-click or select and drag the **Activities** you want included in the report to the **Print List**.

6- Click **OK** or press **Return/Enter**.

7- Send the report to the printer.

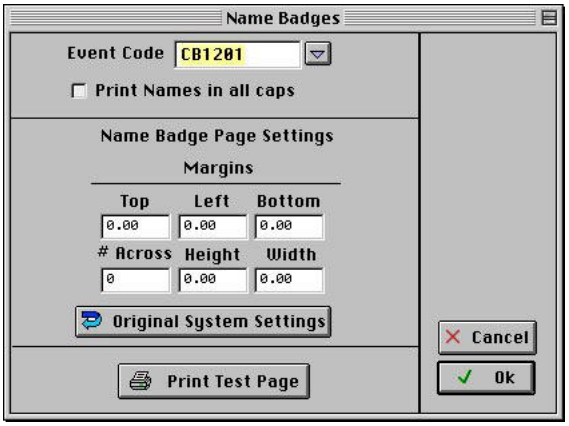


Name Badges

1- Click on Reports on the menu bar and select Name Badges Page. A pop-up list of available events or camps appears.

2- Double-click the desired event loading the code in the **Event Code** field.

3- The Event Code appears in the Event Code field. Check the **Print Names in all caps** checkbox if desired. Make changes to **Name Badge Page Settings** to match the name badge stock you are using.

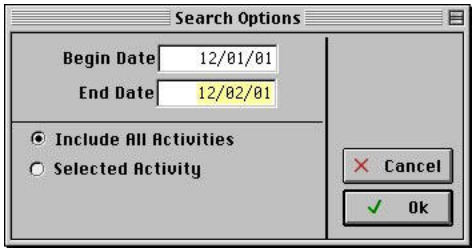


NOTE 7.12: You may click the **Print Test Page** button to print a test page to make sure the settings are correct. If correct, click **OK** or press **Return/Enter**. If not correct, change the settings and print another test.

4- After clicking **OK** or pressing **Return/Enter** the **Name Badge Options** dialog box appears.

5- Select the desired options and click **OK** or press **Return/Enter.**

6- The **Search Options** dialog box appears.



7- Type the beginning and ending registration dates for which you want name badges to print. You may **Include All Activities** or turn on the radio button by **Selected Activity** and pick a particular activity off the pop-up list.

8- Click **OK** or press **Return/Enter**

9- Send the report to the printer. Make sure the proper name badge stock is in the printer.

Name Badge Export

This provides a tab-delimited export document of name badge information which can then be merged with a word processing name badge template or imported into a third-party name badge program.

1- Click on **Reports** on the menu bar and select **Name Badge Export**. A pop-up list of available events or camps appears.

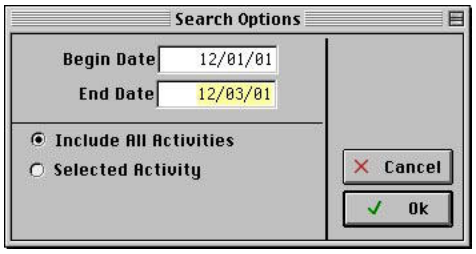
2- Double-click on the event for which you wish to print name badges. The window to the right appears.

3- The Event Code you selected appears in the **Event Code** field. Check the **Print Badges in all caps** checkbox if desired.

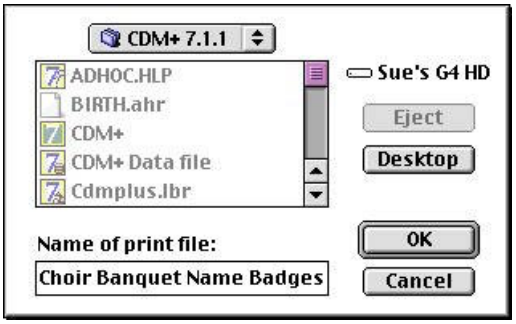
4- Click **OK** or press **Return/Enter**.

6- Select the desired Name Badge Options and click **OK** or press **Return/Enter.** The Search Options window appears.

7- Type the beginning and ending registration dates for which you want name badges to print. You may **Include All Activities** or turn on the radio button by **Selected Activity** and pick a particular activity off the pop-up list.



8- Click **OK** or press **Return/Enter.** The following dialog box or one similar to it appears:



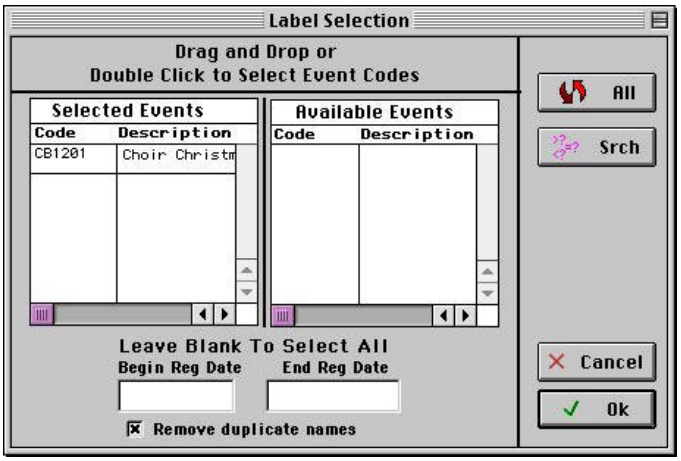
9- Type a name for the export print file in the **Name of print file** field and indicate where you wish for it to be saved.

10- Click **OK** or press **Return/Enter**. Information will be exported and the export print file you saved can now be used for a mail merge.

Event Labels

Mailing labels may be printed for any event or combination of events.

1- Click on **Reports** on the menu bar and select **Event Labels.**

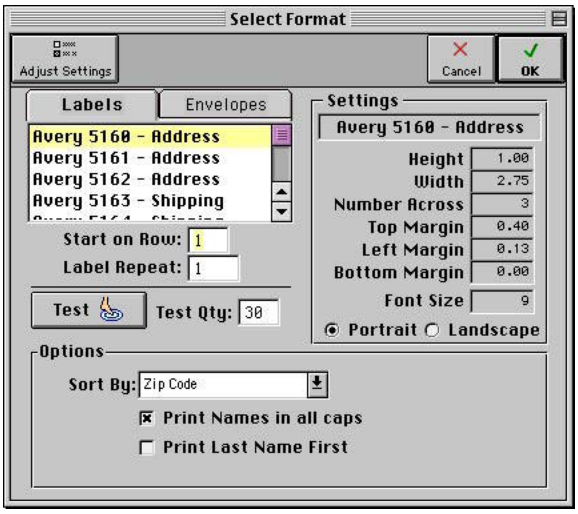


2- Select the event(s) for which you wish to print mailing labels by double-clicking on them in the Available Events list on the right, moving them to the list of Selected Events on the left. Clicking on the **All** button will select all Available Events, moving them to the lefthand list.

3- Type the beginning and ending registration dates for which you wish to print. Leave these fields blank if you want to print labels for all registrants for this activity. Click on the checkbox if you wish CDM Plus to **Remove Duplicate Names**.

5- Click **OK** or press **Return/Enter**.

6- Select type of label from the **Avery** list or click on the **Envelope Tab** and select a envelope size to print directly on envelopes.



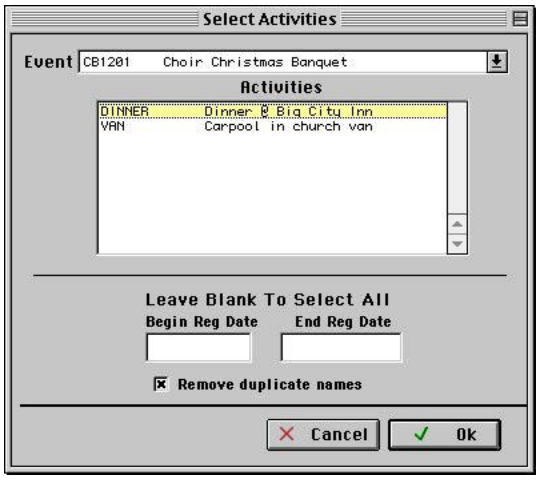
6- Select the desired sort option, print in all caps, and/or print last name first. You may choose to do an alignment test at this point by clicking on the Test button . Make sure the proper type of labels are in the printer before running an alignment test.

7- Click **OK** or press **Return/Enter**.

Activity Labels

Mailing labels may be printed for any activity of any event.

1- Click on **Reports** on the menu bar and select **Activity Labels**.



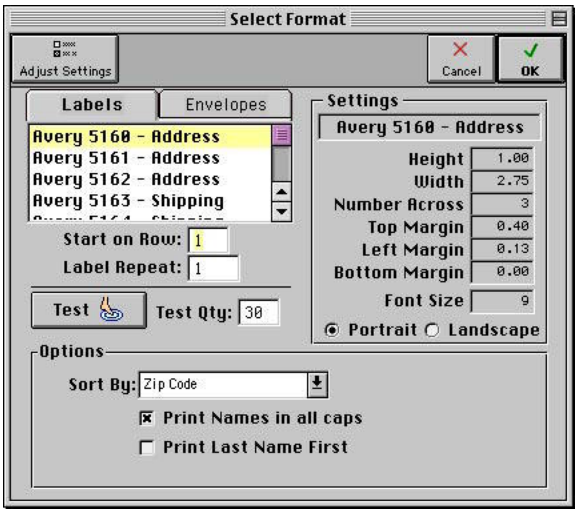
2- Use the Down arrow to select the desired event from the pull-down **Event** menu.

3- The Activites related to that Event will appear in a list below. Click once to highlight the Activity for which you wish to print mailing labels.

4- Type the beginning and ending registration dates for which you wish to print. Leave these fields blank if you want to print labels for all registrants for this activity. Click on the checkbox if you wish CDM Plus to **Remove Duplicate Names**.

5- Click **OK** or press **Return/Enter**.

6- Select type of label from the **Avery** list or click on the **Envelope Tab** and select a envelope size to print directly on envelopes.



7- Select the desired sort option, print in all caps, and/or print last name first. You may choose to do an alignment test at this point by clicking on the Test button . Make sure the proper type of labels are in the printer before running an alignment test.

8- Click **OK** or press **Return/Enter**.

9- Send the report to the printer making sure the proper label stock is loaded.