Mind Towards

MINISTRY

webinar series

Let's Talk Registration!

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Registration Form

Fellowship One's Form Builder tool allows you to build forms that you can place on your website to allow people to register for events. Though Form Builder was created for event registration purposes, it is not limited to this type of form.

Prior to Creating a Registration Form

A little housekeeping must be done before you run off and create your first form. Two tasks will make it easier to create your forms: activity setup and fund setup. Let's look at these two separately.

Activity setup

When you are creating an event registration form, it's a good idea to let the form do some work for you such as assigning registrants to an activity. The ability to create assignments based on a form's submission or an answer to a question is a wonderful convenience. By having an assignment, people are easy to find using Query Builder, rosters can be created, and all participants will already be in the correct room/location when they show up at Check-in.

In order to make use of the assignment features within your form, you should take a minute to configure your activity prior to beginning your form. Create the activity, its schedule with recurrence, and a room/location to hold the registrants. When you have finished this, you can attach it to the form.

Fund/sub fund setup

If your form will have any kind of money associated with it, you must attach a fund (optionally you can attach a sub fund as well) to it. But not just any old fund will do. Funds that are to be used with forms, must have an Account Reference tied to the fund. An Account Reference is simply a fancy way to say that the fund has been tied to the payment gateway and is ready to process payments.

Account references are created in Giving > Setup > Account References by a Fellowship One user who has Contributions Write access. Once created, you can edit the fund you want to use with the form and pick the account reference to associate with it.

Remember when you are editing your fund that you do NOT want to select the Allow online giving check box unless the fund should also appear in the Online Giving section of your church's website.

Create Event Registration Form

When creating a form, you will first configure the general settings for the form. General settings include the name of the form, the date range the form will be available, how many people can use the form to register, and gender and age range restrictions.

To Build a Form

1. Click WebLink > *Event Registration*> Manage Forms. The Form List grid appears. If this is the first time you are using WebLink, there will be no forms listed in the grid.

2. Click the Add Form button just above and to the right side of the Form List grid. The Add/Edit Form profile appears.

3. Type a unique name for your form in the Form name field.

   Tip! Try to be specific in this field. For example, “Men's Retreat” is not as descriptive as “Men's Retreat - November 2008 or the actual name of the retreat.

4. Optionally, type a number in the Max submissions field to limit the number of people who can submit this form. For example, to survey 100 teens or to limit registration to an activity to 40 people.

5. Optionally, create a date range for the form by selecting the radio button beside the date fields in the Date range field. Make sure the form date includes today, otherwise you will not be able to access the form to test it. You can come back and edit the date range later for the actual range of the form.

6. Optionally, restrict the Gender of the person that can submit the form by selecting the Restricted to radio button and choosing the gender from the corresponding drop-down field. For example, if you are creating a Women’s conference registration, select *Female* for the form.

7. Click Save settings. The Form Summary appears.

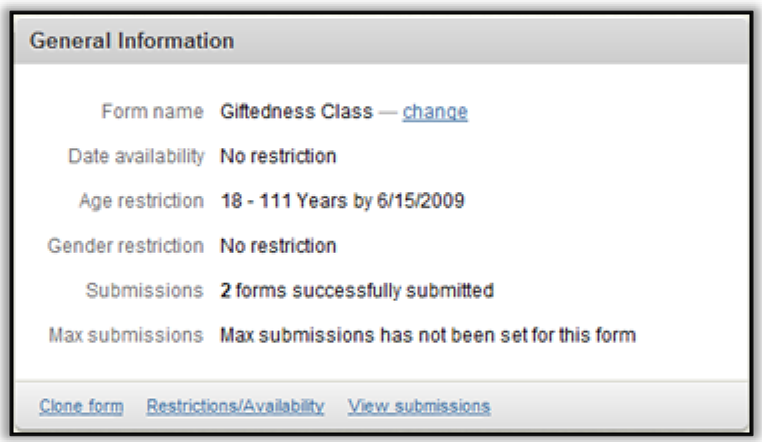
Form Summary

The Form Summary is the “command center” for your form. From the Form Summary you can customize your form to be an activity registration, a survey form, an online purchase form, or a combination of forms. You may notice that initially there is not much information in the Form Summary other than the URL link for the form and the general settings for the form. However, there is a wealth of functionality you can add to the form.

The Form Summary is broken into panels of information. Each panel provides tools to customize the form as needed. The different panels in the Form Summary are listed below:

General Information displays basic information about a form. The name, date availability, age restriction, gender restriction, submissions, and the maximum number of submissions for the form. Additionally, two important tools are available here. You can click Clone Form to make a copy of the form.

If you have to edit any of the information that we have covered thus far, you can edit the form by selecting Modify Form Name or Modify Restrictions Availability in the General Information panel.

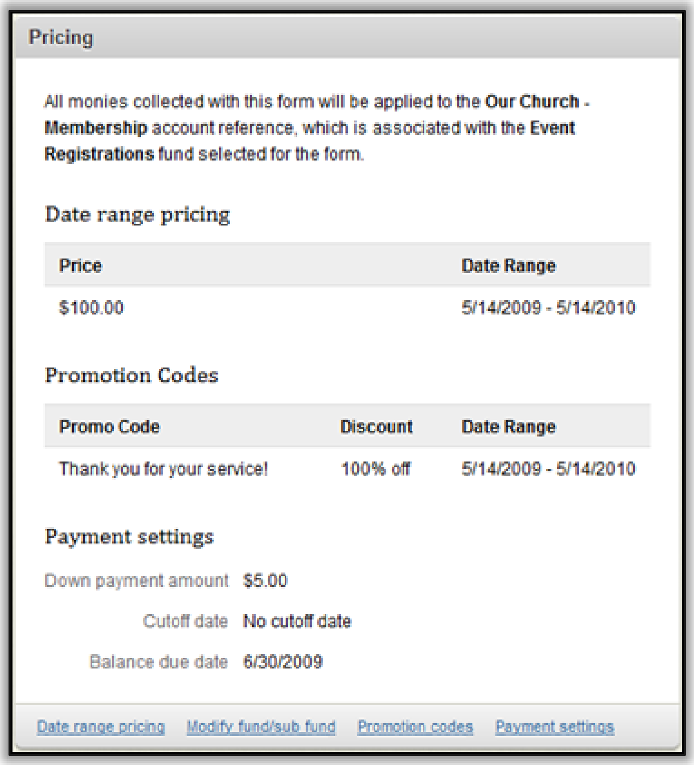


Pricing

Pricing allows you to configure a price for the form, pricing for drop-down list question answers, promotional codes, and down-payment options. Notice that the only thing you can do when you first visit the Pricing panel is Associate a Fund/Sub Fund. This is because a fund must be associated with the form to allow for payment processing.
Once you have added the fund, you will see the ability to add date range pricing.

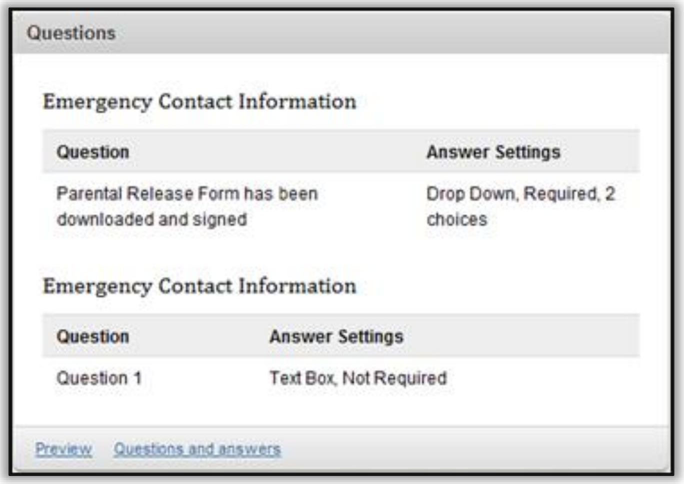
Configure pricing based on a date range. When you attach pricing to your form it means that web users must pay this amount to submit the form. Examples of this are activity registration forms where a registration fee is required for a special event or activity. An alternative to this is to attach pricing to answers to drop-down list questions. This gives people an option of purchasing something or not when submitting the form (e.g., In a drop-down list question such as "Select your T-shirt size below" each size can be associated with the correct pricing). The challenge to question pricing is that you cannot apply a promotional code or allow the down payment option on question pricing.

If you attach a price to the form itself, Promotion codes become active, which allow configuration of discounts for the cost of the registration.



Questions

The Questions panel allows you to create questions to ask people who register for the event. You can create text based answers or drop-down list answer choices.


Questions

Emergency Contact Information

Question	Answer Settings
Parental Release Form has been downloaded and signed	Drop Down, Required, 2 choices

Emergency Contact Information

Question	Answer Settings
Question 1	Text Box, Not Required

Preview Questions and answers

Drop-down list type questions have configurable answers that can be associated with a participant assignment and/or price if needed. For example, create "Select T-Shirt size" and each answer corresponds to a size along with the price for that size.

In the same way the Form Summary is the "command center" for a form, the Question and Answer Summary is the "command center" for questions. The Question and Answer Summary is the launching point for adding new question headers, adding questions, adding answer choices to questions, and preview how the questions will appear to people submitting the form.

You can preview your questions any time by clicking Preview in the Questions panel or in the Question and Answer Summary.

Question headers

Before we can develop questions for the form, you must create question headers. These are organizational devices that are used to separate questions by type. For example, "Registration Information", "Emergency Contact", and so on.

Once headers have been added, you can sort them in any order necessary by clicking the up and down arrow beside the header names in the Headers grid at the bottom of the page.

To Configure Headers

1. Click Questions and answers in the Questions panel on the form summary. The Question and Answer Summary appears.
2. Click Add new header. The Add/Edit Question Headers form appears.

3. Type some text for your header in the header text in the Form header field
4. Click Add header. The question header appears in the Headers grid at the bottom of the profile.
5. Click Done. This will take you back to the Question and Answer summary.

Adding Questions

From the question and answer summary, you can now add questions to any of your form headers.

To Add a Question

1. Click Add new question beneath one of your headers. The Add/Edit Questions profile appears.
2. Type the question in the Question field.
3. Select the Answer required check box so registrants must answer this before the form can be submitted.
4. Next, decide what type of answer you expect from your users. Your choices are as follows:
    - Text—this is the default selection and there are many features you can use to ensure your users type what you expect them to in the resulting text field. As you may guess, this selection means that you are providing a blank field that your users are expected to type their answer into. First, decide whether you want to display a single line text box or a multi-line text area. This selection depends upon how long you expect the answer to be.

      The next decision to make is if you are going to limit the answer to a particular number of characters. This field is helpful when you are trying to capture a specific piece of information such as a postal code or a phone number where there is a known quantity associated with the value.
      Finally, decide if you want Fellowship One to check the answer your user enters. Use the settings in the Validation type drop-down list to determine what type of check to do. This is very useful when checking to ensure the user has entered a phone number. Choose Phone if you only expect 7 numbers in the answer and Phone ACH if you expect 10 or more numbers in the results.

    - Drop Down—this type of question requires you to provide a list of options your users can choose from. For example, what grade will your child enter in the fall? Is a drop-down list question where you can provide a list of school grades to choose from. Other options might be T-shirt size, Meal choice, Number of family members attending, and so on.

5. Optionally, you have the ability to add additional instructions to your questions. The Instructions area can be used for a variety of things but its main purpose is to give

you a place to provide additional information about your question. The following image displays an example of one way this field can be used.

6. Click Add question. The question appears in the Questions grid at the bottom of the form.
7. Continue adding questions until you are finished with the selected header area.
8. Click the small arrow at the top of the form to return to the Questions and Answers summary.
9. Continue adding questions to each of your header areas in the same manner.

Adding Answer Choices

Now you need to add your answer choices for your drop-down list questions. You may have noticed by now that everything in the question area of form building is done one thing at a time. First headers, then questions, and finally drop-down list answers.

Drop-down list answers are pretty powerful. You can add pricing and participant assignments to answer choices. There are a couple of things to remember though as follows:

- Question pricing is quite a bit different from form pricing. Promotion codes and Down payment options do not apply to question pricing. Question pricing must be paid at the time the form is submitted.

- To use question pricing, you must have a fund associated with your form. You can also use a sub fund as well. Remember that these funds must have account references tied to them. See Form Pricing for more information.

- Participant assignments require that you have the activity pre-configured before you can associate the activity's elements with your question answer. A very popular use for this feature is to have a parent select a child's age range or grade. The answer can be mapped to the correct participant assignment for that age range/grade (the rooms/locations for the activity).

- You cannot attach activity schedules to question answers. If you have an activity that has multiple schedules consider one of the two following options:

1) Create separate activities for each schedule rather than one activity with many schedules. You will also need to create separate forms—one for each schedule.

2) Do not use question answers to create your assignments. Rather, use the Activity Association panel in the Form Summary. If you choose this option and you have multiple rooms/locations people should be checked into, create a single registration room. Prior to your activity date, use the Move Assignments feature on the Ministry tab to move registrants to the correct room/location.

To Add an Answer Choice

1. In the Question and Answer Summary, click the Add button for one of your drop-down list questions. The Add/Edit Answer Choice form appears.
2. Type an answer choice in the Answer choice field.
3. Optionally, type a price associated with the answer in the Price field. For example, if the answer choice is a T-shirt size, enter the price of the t-shirt.
4. Optionally, select the Default selection check box if you would like to pre-select this answer choice for your user. This option can be selected for only one answer choice. It is useful if you expect the majority of your users to select one particular choice over others.
5. Optionally, add a participant assignment by selecting the Create a participant assignment to the following radio button. This action will enable all activity drop-down options where you can select the Ministry, Activity, Breakout Group, Activity Group, and Room Location options. If your activity does not have Breakout Groups or Activity Groups, you can skip these fields.
6. Click Add answer.
7. Repeat the steps until you have added all your answer choices.
8. Click the return arrow button at the top of the form to return to the Question and Answer Summary.

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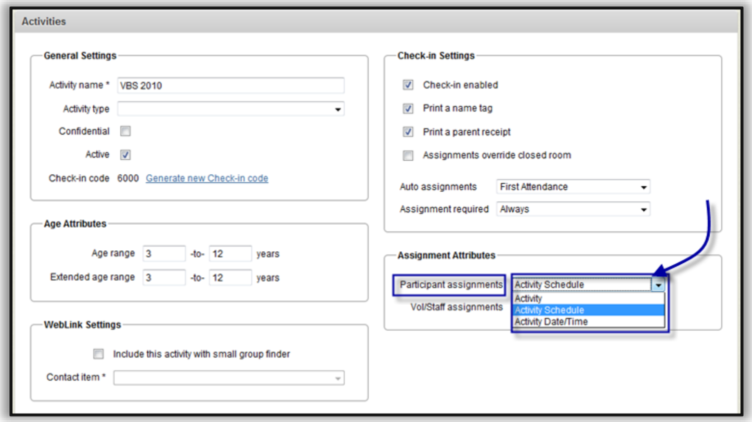
Activity Association Panel

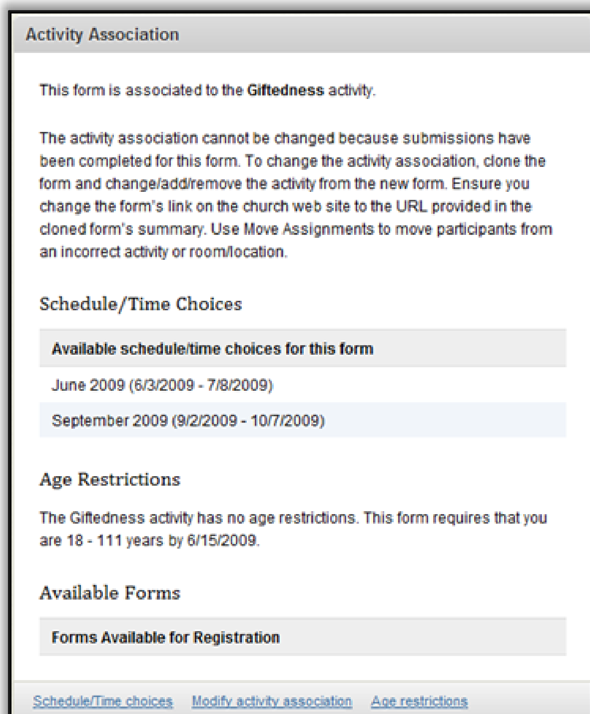
The Activity Association panel allows you to associate an activity with the form so that when people register, an assignment is created. This panel also allows you to make the activity schedules available to registrants so they can choose a particular schedule or date/time to attend.



These choices are defined below:

- Activity—the participant can attend this activity any time it is available to check into. This setting is appropriate for all activities that do not require registration to attend.

If you have your assignments set to Activity, do not even bother associating a schedule to your form. It will not be recorded when people begin registering. Remember that the Activity choice means you do not care about schedules. The person can come any time the activity is available.



- Activity Schedule—the participant will attend the selected schedule. This setting is appropriate when you have activities that meet several times during a set period of time (for example, a semester). MOPS, Giftedness Classes, Celebrate Recovery are all examples of activities that occur often at church but people only attend when it's convenient to do so.

- Activity Date/Time—the participant will attend the selected date/time only. This setting is appropriate for activities that occur over and over but participants typically attend only one time. For example, a baby dedication service, or a Baptismal service.

When you make your schedule association to your form, you will choose the option that best matches your activity configuration. As shown in the picture below, you’ll see that there are two places to associate schedules. The topmost area is reserved for activity schedules while the bottom area is reserved for date/time. Choose the radio button option that matches your activity configuration.

To Associate an Activity With Your Form:

1. Click Establish an activity association in the Activity Association panel. The Create an Activity Association Form appears.
2. Select the Associate an activity to this form radio button. The assignment fields will activate.
3. Select an appropriate Ministry, Activity and Room/Location from the drop-down list. If you are using activity RLC groupings in your activity structure, you will need to choose an Activity Group prior to a Room/Location. Optionally, you can also select a Breakout Group if appropriate for your activity.
4. Click Save settings. The Form Summary page appears.

Once you have associated an activity with your form, you can associate the schedules that go along with the activity. This is only necessary if your activity has more than one schedule choice. If it has only one, you do not have to follow these steps.

To Associate Activity Schedules:

1. Click Schedule/Time Choices in the Activity Associations panel. The Add/Edit Activity Schedules form appears.
2. Select one of the following:
    - Ask the registrant to select a schedule—if you configured your activity to record assignments based on Activity Schedule.
    - Ask the registrant to select a specific date/time of attendance—if you configured your activity to record assignments based on Activity Date/Time.
3. Click Add >> or Add All >> to move your selections to the right hand box.
4. Click Save. The Form Summary appears.

Publishing Event Registration Forms

After having created a weblink form, you are now ready to hand out the link to the form. You can do this through an email, or by embedding the form link on your website. You can retrieve the form link either under Web User section on the Form Summary, or by running the A8010 report.

Using Group Email to Send the Registration Link

One way to ensure your events are very easy for users is to send the form link in a group email message. This is particularly helpful for children's events (students and children under age 13 may not create accounts).

To Insert a Form Link

1. Click People > Group Email > Compose. The email editor appears.
2. Type a Subject and click Add recipients to choose individuals or a group that has been previously created.
3. Type your invitation in the text editor.
4. Place your cursor where you want the form link to appear in the body of your email message and click Registration form in the Dynamic Link box on the right side of the editor. A light box listing all available registration forms appears.
5. Click the name of the form you want to use. The dynamic text appears in the message body.
6. Complete your email and click Send email.

Reports in Event Registration

There are many great form builder reports available in the Report Library. In the Report Library (click Reports), do one of the following to access form builder reports:

- Type "registration" in the search field at the top of the library and press Enter. Many registration related reports appear in the results.
- Type your report number in the search field and press Enter. The reports associated with the number appear.
- Click the FT Reports tab and then click Ministry and Form Builder 2.0 in the tag listing. All form builder reports appear in the search results.

The following are favorites listed by category. Many of the following reports allow you to output to a Temporary Group, which will generate a group in Groups > *Groups by Group Type* > View All. Look for the Temporary group type. This is a helpful feature when trying to communicate with registrants.

Payments

M6023E - Activity Registration by Form with Payment and Questions and Answers—this is a very detailed report that produces more than one Excel sheet within your work book. Sheet 1 contains the financial summary for the event. Sheet 2 contains registration details.

M6022E - Activity Registration by Form with Payment and Credit Info—if you're just interested in the finances of a form, this is a great report that provides detailed transactions.

G7011E - Form Based Registration Payment Summary—allows you to pull online payments by fund for forms.

G7012E - Activity Registration Balances by Form—allows you to pull a list of people with outstanding balances due on a form

Q & A

M6012E - Form Response by Form and Individual—very simple report that shows person, gender, age, phone number, and answers to selected questions.

M6007E - Activity Registration Results by Form (tabbed Excel)—shows activity assignment Room/Location, First Name, Last Name, Email, Age, Gender, answers to questions.

Top Event Registration Reports

M6023 – Core WebForm Submission Records

- Return details for Webforms selected, submitted within a time period
- Focus on one or many Webforms under Event Registration
- Focus on Form and its Questions and Answers
- Focus on Submission Notes
- Focus on Payment details and Notes

M1400 – Core Assignment Records

- Return people assigned to Activities selected (includes InFellowship Groups membership)
- Participant assignments for selected Activity, Schedule, RLC Group or RLC
- Staffing Assignments for selected Activity, Schedule, RLC Group or RLC
- Membership for selected InFellowship Groups.
- Participant or Staffing Assignment by Status or Attribute
- Run output into a Temporary Group for easy Mass Action or email distribution list

G1050 – Core Giving Records

- Return details about giving received within a time period
- Can be filtered by:
    - Who/how many with the Status of X has given and the amount.
    - Who/how many has given to a certain Fund, Sub Fund, Pledge Drive, Online
    - Contribution summaries
    - Top contributors
    - Contributions over X amount
    - Contributions less than X amount
    - Scheduled Giving frequency

M6002 - Registration Results by Individuals with Notes

- Display an individual per page