

RegPoint New User Overview and System Setup

This document includes important information regarding the initial set up of your RegPoint System. Upon your first login to the system, there are certain steps to take in order to best prepare for accepting registrations.

Settings



The Settings link is located at the top of your Dashboard. Click the Settings link to begin your system setup.

Once in your system settings, the menu on the left includes the following options: Site Parameters, User Accounts, User Groups, Access Rights

1. Site Parameters:

- a. Organization Name
- b. Invoice Settings
- c. Registration Settings
- d. Download Forms

a. Organization Name

Completing the fields in this screen will allow your system to access this information when formatting statements/invoices, footer data for your shopping cart page, etc...

Below are descriptions of some of the fields included in this section:

- **Website Title:** This is the system title at the top of the Shopping Cart page. It is displayed right after the Organization Name.
- **Statement Message:** This message is displayed on the bottom of all Invoices and Statements.
- **Home Page URL:** This is where you want all system dependent "Home" buttons to point. For example, the Home button on the Thank You page. This URL can be your main website or your Shopping Cart homepage deep within your website.
- **Phone, Email, Address, City, State and Postal Code fields:** Once completed, these fields will populate the mailing address and contact info fields on all Statements and Invoices as well as the contact information for the Contact Us button that displays on all pages of the registration process. *NOTE: The email address entered in the email address field also serves as the 'From' address for all emails sent by the system, i.e. all email sent by the system and sent 'From' this address.*

b. Invoice Settings Tab

Check the Use Custom Header box to activate this option. To create custom text in the footer notes section of your Invoices/Statements, enter that information in the section provided. This can include items such as the name and address of your organization, phone contact information as well as your Tax ID number, if desired.

c. Registration Settings Tab

Forms of Payment: Select the forms of payment you will receive. This affects ALL program listings.

Additional Reg. Questions Page Title: This enables you to set the title for the Additional Registration Questions section on the registration form. For instance, if you are a sports camp, you may entitle it Additional Athlete Information, whereas if you are an academic camp, you may want to entitle it Additional Student Information. This setting affects the Additional Registration Questions page on ALL registration forms.

Search Labels: Set the names of the search tags that you will enter into each Program Listing. These are the titles presented on the Search Filter box of the Program Listing page on your public website.

Auto Registration Acceptance: If you check this box, all new registrations will automatically be Accepted at time of registration, meaning the registration, once submitted, will be submitted to Confirmed Status automatically, and the Accept Participant Email (setup on the individual Program Listings) will be sent to the new participant. This setting will affect ALL registrations coming in for ALL Program Listings. *NOTE: The Auto Registration Acceptance and Auto Payment Processing options must be combined. Utilizing one of these features without the other could result in undesirable results.*

Auto Payment Processing: If you check this box, all new registrations will automatically be processed for payment immediately, and in real time, upon submission. This setting will affect ALL registrations coming in for ALL Program Listings, and will only work if the Auto Confirm Registration is selected as outlined above. *NOTE: The Auto Registration Acceptance and Auto Payment Processing options must be combined. Utilizing one of these features without the other could result in undesirable results.*

New Registration Notification Email: If this box is checked, the system will send an email to the email address entered on the Organization Name tab notifying you that you have received a new registration.

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d. Download Forms Tab

All forms added here will be displayed in the "Download Forms" link within your Shopping Cart page. To upload files for display, use the Upload Files button at the bottom of this page. When you select this button, a "Picture/File Upload" box will appear. Simply click "Choose File" to browse to the file you want to upload on your computer, then click Start Upload.

Once your file is uploaded, enter a description in the Description field. This description will appear when the user views the form for downloading.

2. User Accounts:

Setup user accounts for those you wish to grant access to the system. To customize access levels, or create new ones, go to Access rights. See below for more information.

3. User Groups:

User Group Access allows you to create groups, permitting access of programs to specific users. This is a great tool to use when you have several program options and different people administering those programs.

4. Access Rights:

- a. Access Rights
- b. Access Levels

Within this section, you can both grant access rights to certain users and/or create custom user access levels.

a. Access Rights

Once all the Access Levels are setup at the bottom of this page, you can go about assigning them access to the various parts of your system. For instance, if you do NOT want all accounts with "User" access level to have access to the Master Accounts, simply click [Edit] next to Master Accounts and remove "User" from the Level field, then hit Save and then Close. This also works in reverse if you do want a particular access level to have access to a specific system section.

Additionally, you can also setup a custom access user name, so if you created a new user for one of your staff, say "johnsmith" is the user name and it is setup with a "User" Access Level, and you want to grant them specific access to the Settings area, even though users with the "User" access level designation do not normally get access to Settings, you can over ride that by manually entering their user name. To do so, simply click [Edit] next to Settings, and then enter the user name, "johnsmith" in this case, to the "Users" field, then hit Save and then Close.

b. Access Levels

When first viewing this page, take note of the 4 standard Access Levels listed at the bottom of the page under Access Levels: Super User, Admin, Director, and User. At time of system setup, these four Access Levels will be setup for you automatically. If you wish, you can rename them to anything you want. In addition, you can create your own custom Access Level, and name it accordingly, here. Once all the Levels are setup, you then grant them access to the various parts of the system in the Access Rights section.

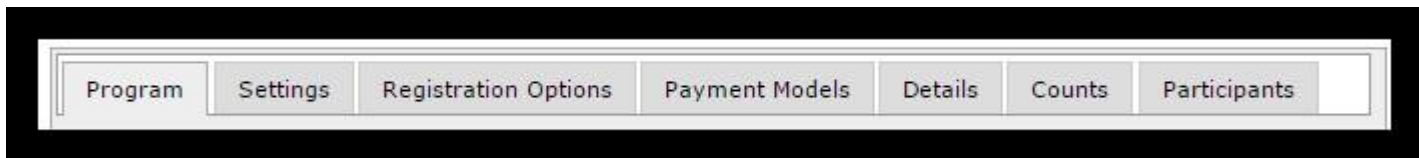
Programs



To setup a new Program listing, select Programs from the main navigation level (Black bar across top of screen), then hit the green Add New button. **Note: It is advised to setup one perfect, comprehensive listing, and then use the Copy Program Listing button inside the listing page itself to make new copies. Then simply go into each listing and copy and change the listing name, date, price, etc. as necessary.*

** All fields containing a red asterisk* must be completed before a program can be Activated.*

On the screen for each listing, there are 7 tabs across the top:



1. Program Tab

a. Status:

Active means it will show up on the main listing page and is eligible for registrations; Inactive means it is not online and cannot accept registrations.

b. Event Code:

This code is automatically assigned to your program and cannot be changed.

c. Program Title:

The main Program Title. It is advised not to use special characters, such as ()/\", in this field.

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d. Sub Title:

This line is a second descriptive line presented on the listing page right below the Program Title and can read anything you like, i.e. "Register Fast, Camp Almost Full", or "For 5 & 6 year olds only".

e. Billing Code:

This field is meant to be used as an internal code exclusive to your program. Many clients use this as a general journal entry code. This code will not only be attached to the participants' registration record, but it will also be uploaded with the batch deposit process to aid in your accounting reconciliations.

f. Start Date:

Start date of the program

g. End Date:

End date of the program

h. Registration Cutoff Date:

This is the date you want this particular program listing to be removed automatically from the main program listings page. This date will supersede the Status button above.

i. Minimum Age:

Minimum age of accepted participants.

j. Maximum Age:

Maximum age of accepted participants.

k. Gender Restrictions:

Set whether this program is Male only, Female only, or Coed.

l. Strict Requirements:

This setting allows you to tell the system to allow only those participants that are within the set age and gender parameters set forth above. If set to Yes, the Minimum Age, Maximum Age and gender requirements will be displayed for the client on the shopping cart.

m. Sort order:

Allows you to sort all your program listings by number on the main program listings page. For example, the program listing with a sort order of 1 will be listed at the very top of the page, regardless of dates, and then sort order 2 will follow that and so forth. Please keep in mind that the Sort Order fields in all programs must be updated in order for this feature to function.

Should you need to add a program later, you can duplicate numbers to place programs in specific places. For example, if you already have a program with a sort order of 2 and you need a new program to show second in the list, set the new program with a number 1 in the sort order field. This will place that program in the second position.

n. Program Description:

Enter a full program description into this field.

2. Settings Tab

Note: ALL settings below are specific to the listing you are working on at that time. They do not relate to any other listing. Each individual listing must be setup independently.

a. Max Participants:

How many active participants you want to allow in the program.

b. Deposit Amount & Expiration Date:

The Deposit Amount and the Expiration Date of that Deposit Amount (the date they no longer can select the deposit amount and must pay full amount) for this particular listing. If you do NOT want to show the Pay Deposit option on the registration form at all, simply enter a date in the past, and this entire row will disappear from the Registration Form.

c. Convenience Fee:

This is an optional fee added at the end of the registration process. The title, "Convenience Fee" can be changed to a title more suitable to your specific needs. In most cases clients choose to use this if they wish to recover their cost of providing online registration. If you enter a number here, this fee will be added to the total amount due on the Registration Summary page, the final page before the payment information and entry page. If you set this field to zero (0), the Convenience Fee row on the Registration Summary page will not appear.

d. Search Tags:

This section works in conjunction with the Default Search Options found in Settings --> Registration Settings and allows you to set the Minimum and Maximum Grade Levels for a particular program. The remaining Search options can be found in the Details tab of your program setup.

e. Include the Following Health Information:

Only those fields selected here will be included on the Health information page of the registration Form.

f. Skip Registration Steps:

Any registration process sections checked here will be skipped during the registration process all together.

g. Require Health Questions:

If set to "Yes", this will set all questions in the Health Information Fields as required fields.

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3. Registration Options Tab

This tab allows you to set the various price points you want to offer for this program, i.e. Day Camper is \$575, and Resident Camper is \$975. When selecting 'Add New Option', you will be asked to complete the following fields:

Position Title: Option title describing the price option offered.

Position Price: Price of Registration Option. Enter in 0000.00 format.

Max Registrations: Maximum number of registrations for that specific Registration Option.

Order: Order in which this Registration Option appears in the listing.

4. Payment Models Tab

Assign payment models created through Payment --> Payment Models by clicking on 'Assign Payment Model'. This will take you to the Payment Models section where you can create and select the Payment Model(s) to assign to your program.

Payment Models will be listed and can be removed by clicking on the red minus sign or edited by clicking on the Payment Model title.

For more detail on Payment Models click this link --> [PAYMENT MODELS](#)

5. Details Tab

This tab is where all custom messages and line items are set up and customized. Each message here is unique to the program listing, however, can be shared with other program listings through the 'Manage Program Details link on left side menu.

The following messages and line items are included here:

a. Custom Fields:

Custom Fields can be used for any purpose. Using the Meta_Info Detail Type, you can create custom labels, allowing you to fully customize the registration process.

b. Facility Details:

Facility Details can include location details of where your camp or program is being held. These details will be available for view on the View Details page for your camp or program.

Using the Facility Map URL allows you to include a map of the location of your facility. To use this feature, you will need to copy the HTML from your Google Map location into the field available.

c. Registration Policies:

Single Registration Policy: The Single Registration Policy shown here will include one large field of text which will display all text entered below, followed by a single name field at the bottom. This name field is immediately preceded by the following prompt: "You must accept these policies in order to continue with your registration. Please enter your First and Last Name to accept these terms". No participant will be allowed to submit their registration without first entering their full name into this field.

Multiple Registration Policies (Policy Title/Text Options): The Multiple Registration Policies option allows you to have up to three separate Registration Policy sections with individual section titles, text fields, and "I Acknowledge" check boxes. These "I Acknowledge" check boxes prompt the user to check each box to indicate that they have read and understand that particular section. They cannot move past this page without all check boxes being checked. You can use 1, 2 or all 3 sections at once.

After these policies have been affirmed, the very bottom of the policies popup box will show the name field. Once again, this name field is immediately preceded by the following prompt: "You must accept these policies in order to continue with your registration. Please enter your First and Last Name to accept these terms". No participant will be allowed to submit their registration without first entering their full name into this field.

d. Schedules:

Schedules are used to outline specific daily or weekly schedules in accordance with your particular program or camp. These schedules are viewable in the View Details section of your program, within the shopping cart.

e. System Messages:

When creating your program(s), it is necessary to create your System Messages. These are email responses to registrants after their registration has been completed.

System Messages include: Thank You Message, Accept Participant Message, Credit Card Declined Message, Waitlist Message

f. For more details on Details Setup and Detail Labels, click this link --> [DETAIL LABELS](#) & [DETAILS SETUP](#)

6. Counts Tab

This tab gives you a quick overview of all registration totals for this program.

7. Participants Tab

This tab listed in order of registration, all participants registered for this program. It also provides the current status of that registration, as well as the date they originally registered.

Note: you can link directly to that particular registration by clicking on the blue link.