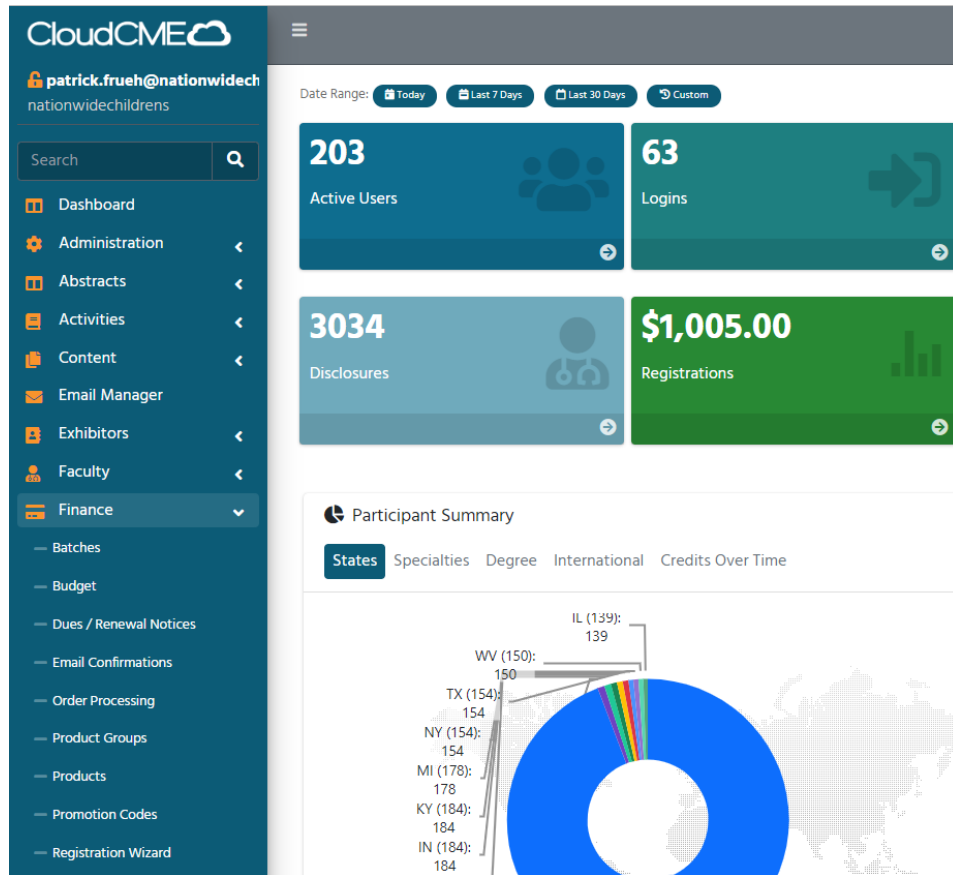


How To: Build a Registration Page in CloudCME

Step 1:

On the left navigation panel, select **Finance > Registration Wizard**

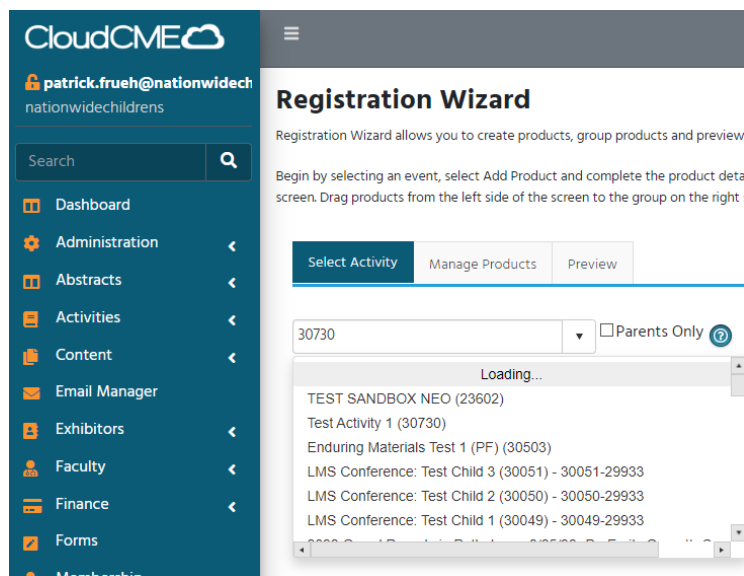


The screenshot shows the CloudCME dashboard for user patrick.frueh@nationwidechildrens.org. The left navigation panel has 'Finance' selected, with a sub-menu showing 'Registration Wizard'. The main dashboard area displays four key metrics: 203 Active Users, 63 Logins, 3034 Disclosures, and \$1,005.00 Registrations. Below these is a 'Participant Summary' section with a donut chart showing the distribution of participants by state. The chart data is as follows:

State	Count
IL	139
WV	150
TX	154
NY	154
MI	178
KY	184
IN	184

Step 2:

On the **Select Activity** tab, search for your activity by typing the activity name. Select the activity from the drop-down list.



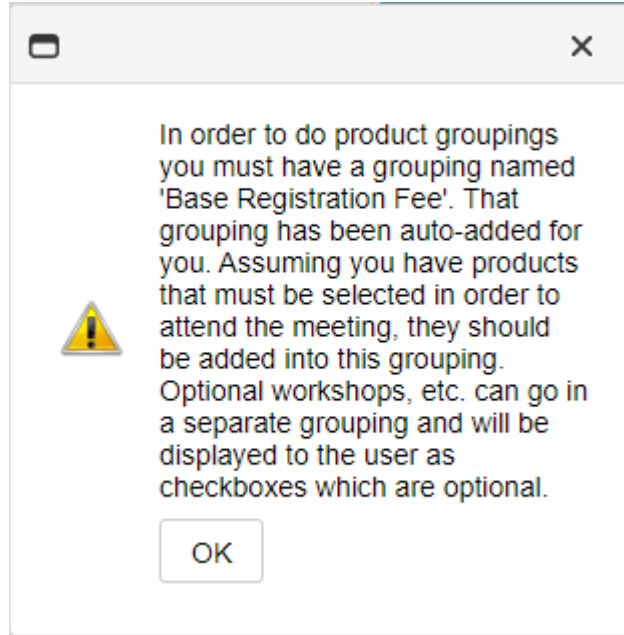
The screenshot shows the 'Registration Wizard' interface. The 'Select Activity' tab is active. A search box contains '30730' and a 'Parents Only' checkbox is checked. A dropdown menu is open, showing a list of activities to select from:

- TEST SANDBOX NEO (23602)
- Test Activity 1 (30730)
- Enduring Materials Test 1 (PF) (30503)
- LMS Conference: Test Child 3 (30051) - 30051-29933
- LMS Conference: Test Child 2 (30050) - 30050-29933
- LMS Conference: Test Child 1 (30049) - 30049-29933

Step 3:

Read the information on the pop-up, then click **OK**

Pro-tip: your event may pull up faster if you use the ParentID to search.



This instruction box will appear. Click OK to Proceed.

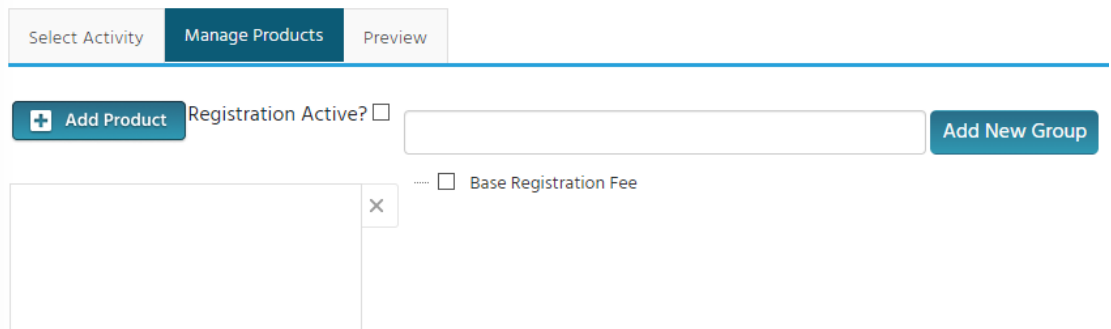
Step 4:

On the **Manage Products** tab, click the **Add Product** button

Registration Wizard

Registration Wizard allows you to create products, group products and preview in the Attendee Portal. An event registration form will be duplicated

Begin by selecting an event, select Add Product and complete the product details. Primary products will be added to the Base Registration Fee. To a screen. Drag products from the left side of the screen to the group on the right side of the screen.

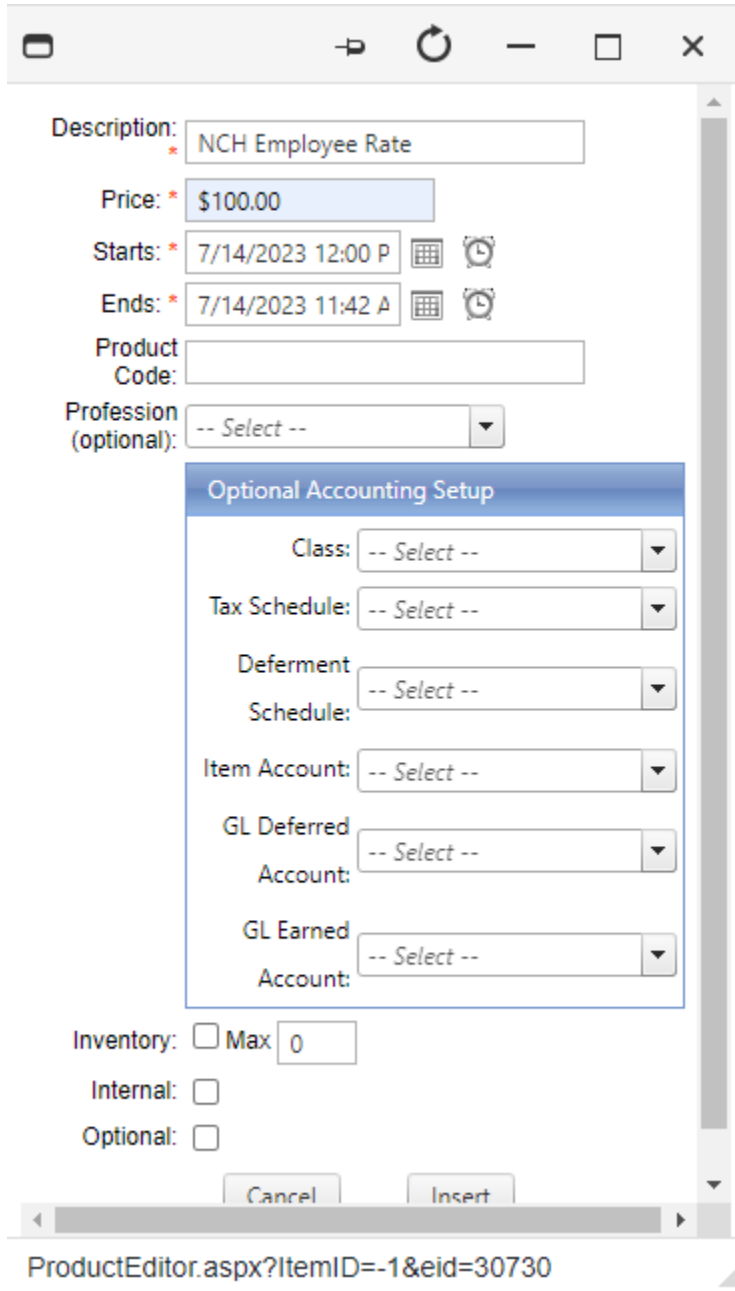


Step 5:

In the **Description** field, type the name of the product or registration type.

You may have different products for internal/external attendees, different credit types or any other differing criteria you choose.

In the **Price** field, type the amount you plan to charge for that product group.



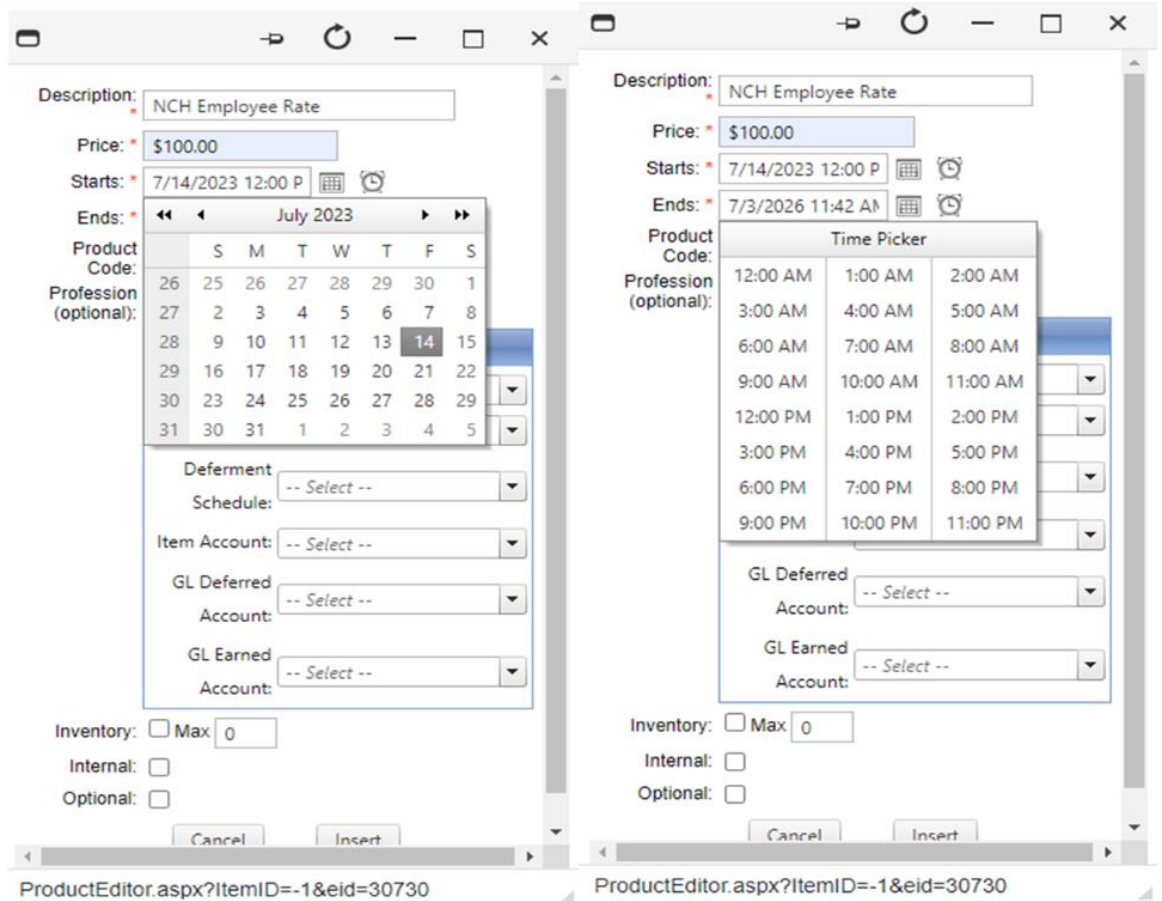
The screenshot shows a web browser window displaying the 'ProductEditor.aspx' form. The form contains the following fields and options:

- Description:** NCH Employee Rate
- Price:** \$100.00
- Starts:** 7/14/2023 12:00 P
- Ends:** 7/14/2023 11:42 A
- Product Code:** (empty)
- Profession (optional):** -- Select --
- Optional Accounting Setup:**
 - Class:** -- Select --
 - Tax Schedule:** -- Select --
 - Deferment Schedule:** -- Select --
 - Item Account:** -- Select --
 - GL Deferred Account:** -- Select --
 - GL Earned Account:** -- Select --
- Inventory:** Max 0
- Internal:**
- Optional:**

Buttons for 'Cancel' and 'Insert' are visible at the bottom of the form. The browser address bar shows 'ProductEditor.aspx?ItemID=-1&eid=30730'.

Step 6:
Using the calendar and clock icons, set **Starts** and **Ends** to when you would like the event to open and close.

(Note around adjusting times to the half or quarter hour.)



If your event will start on the half or quarter hour, you can adjust the time by typing it into the box.

Click **Insert**

Repeat this process for all products you plan to add.

Inventory: Max

Internal:

Optional:

Starts: *

Ends: *

For Enduring Materials: the end date cannot exceed 3 years from the start date.

Optional: Test the registration.

Click the **Preview** tab to view a preview of your activity's registration; **DO NOT** click the **Finish** button in the **Hosted Payment** section (you cannot submit a registration through the preview)

Registration Wizard

Registration Wizard allows you to create products, group products and preview in the Attendee Portal. An event registration form will be duplicated, renamed and assigned to the event automatically. Begin by selecting an event, select Add Product and complete the product details. Primary products will be added to the Base Registration Fee. To add a new Product Group, type in the group name and screen. Drag products from the left side of the screen to the group on the right side of the screen.

Select Activity Manage Products **Preview**

FormID: 6040 Test Activity 1 Event Registration. If edits are required to this form, make them in the [forms manager](#).

1 Login 2 **Registration** 3 Survey 4 Hosted Payment

Registration: Test Activity 1

Patrick Frueh (patrick.frueh@nationwidechildrens.org), you are logged in.

If this is correct, click Continue to start your registration. If this is not you, please click 'Sign Out' in the site navigation above and login with your own account.

Continue

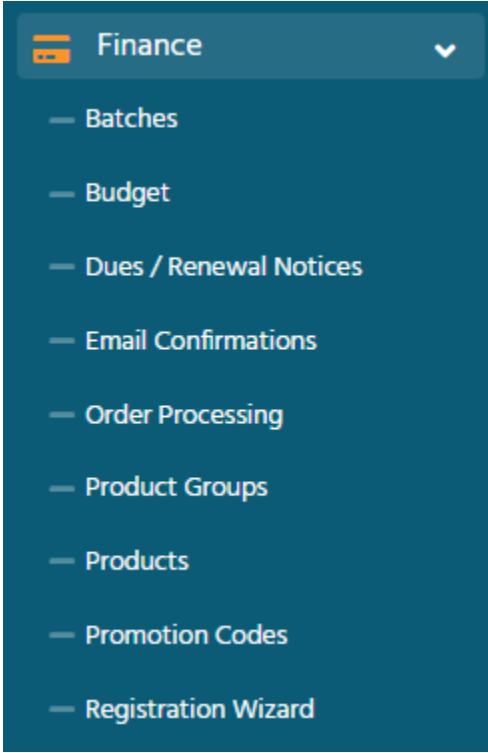
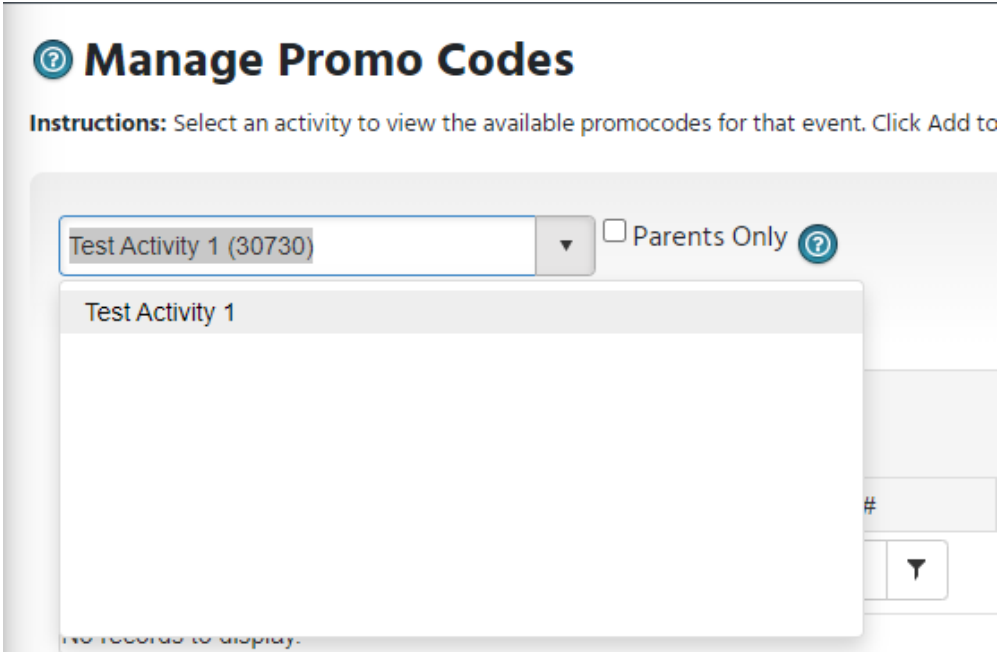
If you are satisfied with how the registration shows in Preview, click the **Manage Products** tab and click the checkbox next to **Registration Active?** to publish the registration to the **Attendee Portal (AP)**

Select Activity **Manage Products** Preview

Add Product Registration Active? **Add New Group**

NCH Employee Rate Base Registration Fee

NCH Employee Rate - \$100.00

<p>Optional: finance codes</p>	<p>You can add a promo code to discount the activity fees if needed.</p>
<p>Navigate to Finance > Promotion Codes</p>	
<p>In the Activity Name field, search for your activity. Select the activity from the drop-down list.</p>	

Click the **+Add new record** button

In the **Description** field, give your promo code a name.

In the **Code** field, type what you would like attendees to type in for the code to work.

You have a few choices for how to set up your promo.

% Discount will take a percentage you identify off the total.

Discount will subtract a set dollar amount

Override will set the price to whatever you identify here.

+ Add new record

ID	PromoCode	Description	PromoCode#
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Instructions: Promocodes allow registrants to pay a lower or \$0 amount by entering the cc discounts. Percentage will reduce the order total by that percentage. Discount will subtract code, which will make the code inactive after xx uses. Codes are applied to all products p Complete all fields below, then click submit.

ID:

Description:

Code:

% Discount: ▲ ▼

Discount: ▲ ▼

Override: ▲ ▼

Quota: ▲ ▼

Applies to Products: ▼

Start Date:

End Date:

No records to display.

In this example, we'll use **% discount**.

NOTE: The promo keyword cannot contain the word promo in it

In the %
Discount field,
verify that **100%**
is visible

Click **Insert**

+ Add new record

ID	PromoCode Description	PromoCode#
<input type="text"/>	<input type="text"/>	<input type="text"/>

Instructions: Promocodes allow registrants to pay a lower or \$0 amount by entering the cc discounts. Percentage will reduce the order total by that percentage. Discount will subtract code, which will make the code inactive after xx uses. Codes are applied to all products p Complete all fields below, then click submit.

ID:

Description:

Code:

% Discount: ▲▼

Discount: ▲▼

Override: ▲▼

Quota: ▲▼

Applies to Products: ▼

Start Date: 📅 ⌚

End Date: 📅 ⌚

No records to display.

Questions? Reach out to us at IPCE@nationwidechildrens.org