

This document will help you understand the decisions being made for your Program Settings:

- 1.) *Use this document when your Organization is setting up Online Registration Program Settings for the first time, or when you want to review your settings*
- 2.) *Use this document to guide your decisions*
- 3.) *Best if used in conjunction with the following Guides:*
 - a. *Online Registration Program Settings*
 - b. *Management Payments*

Understanding Program Settings

It is important to understand the impact of the Program Settings on your Organization's business rules and vice versa. This guide will expand upon the different program settings so your Organization can make the choice the best fits with your existing business rules. However, please keep in mind that you may need to adjust some business rules to accommodate the limitations of the current system.

Completing Activation

- More information about Stripe and help creating your account can be found on Stripe's Support page.
 - Providing your EIN is optional, however it could greatly speed up the business account approval process and is highly recommended.
 - Even though this will be a business account, there needs to be an individual person who is the owner of the business account. They will have to provide minimal personal information.
 - You will be required to set up Two Step Verification to secure your account
 - Stripe uses a cell phone number and text messages or Google Authenticator
 - You must finish creating and linking your Stripe Account before you will be able to accept the Terms & Conditions to finalize your Online Registration set up.
- It is important to read and understand all sections of the Terms & Conditions. Please send all questions to support@the-registry.org

Alternate Payments

- Enabling this feature allows for Attendees to select an option to "Pay Later" when using online registration. They can complete the registration process and reserve a spot without paying.
- This is a great feature for individuals who are uncomfortable or unable to make their payment online using a credit or debit card.
- It is the responsibility of the Training Organization to set up clear rules and directions about how the attendee can make an alternate payment. Some examples of things to consider:
 - If they can mail the payment, when is the latest they can place the payment in the mail?
 - Can they at the event?
 - What happens if they forgot to bring payment with them to the event? How long after the event do they have to pay? Or are they denied participation in the event?
- It is up to the Training Organization to collect all outstanding funds, the Wisconsin Registry cannot help.

- **IMPORTANT NOTE:** When you enter an Alternate Payment for an Attendee they will automatically be marked as Attended for the event. Make sure your business rules accommodate this setting.
- Enabling this feature also allows Director's using Group Registration to select the "Pay Later" option. When this happens only one invoice is generated for the total amount of the group registration. When they payment is received it is only applied to one individual tied to the invoice on the roster for the full amount. Then all individuals tied to that invoice will update to "Paid" on the roster.
 - Example: A Director registers 3 staff members for a training that costs \$25 per attendee. The Director wants to send a check for payment and selects the "Pay Later" option. An invoice for \$75 is generated. When your organization's staff receive the check they click "Enter Payment" on the roster next to one of the three staff members. They enter the full amount of \$75 for that individual. The invoice is marked as Paid in full and all three staff members will display as "Paid".
- If your organization opts to not enable Alternate Payments then Attendees who register online will only have the option to pay online with a credit or debit card to complete registration and hold their spot.
 - Attendees can still pay by alternative methods if your Organization allows by Organization staff manually registering the individual and accepting payment in-person. This can be an accommodating compromise without accepting the risk of outstanding payments.
 - The staff member must have Administrative Access to the Organization Account.
 - The Individual still must at minimum created a free Registry Account so they can be registered by their Registry ID number. They do not need a paid membership.
 - Consider creating a physical location in your organization that individuals can use a computer to create their account and be walked through the registration process.

Setting Program Defaults

- This is an optional step that can be a great time saver for the staff creating your events.
- **Deadline Defaults**
 - If you have business rules that require registration to close a certain time frame before the start date of the event you can set that here. When creating an event the registration deadline will auto-generate based on the event start date.
 - You can set a default and still change a single event during Event Creation. This is in case you need to make exceptions for certain events.
 - Since Instructor Led and Self-Paced events are handled so differently you would need to set a default for each one separately.
- **Default Review, Confirmation, Reminder Pages & Emails**
 - These sections allow you to add default text that will auto-populate for each event you create. This can be a great time saving tools so you do not need to copy and paste every time you create a new event.
 - Each section can be edited unique during event creation as well

- Great place to highlight your organization's policies around registration, refunds, attendance, etc.
- Default Review Page
 - Information that needs to be made available to attendee before they chose to finalize registration.
- Default Confirmation Page
 - Can be kept as simple as a thank you, or can reiterate important policies or next steps
 - Should not be the only place attendees can access policy information or next steps as they cannot return to this page to review information.
- Default Confirmation Email
 - Can contain more information than the Confirmation page since attendees can save and re-review their email.