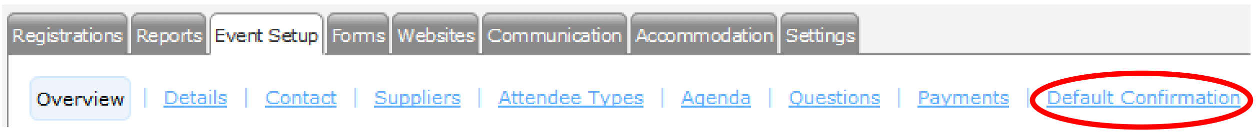
Certain

How-To Guides

Changing the Default Confirmation message for your event

1. From the event that you need to make changes to, go to the Event Setup tab and click Default Confirmation.

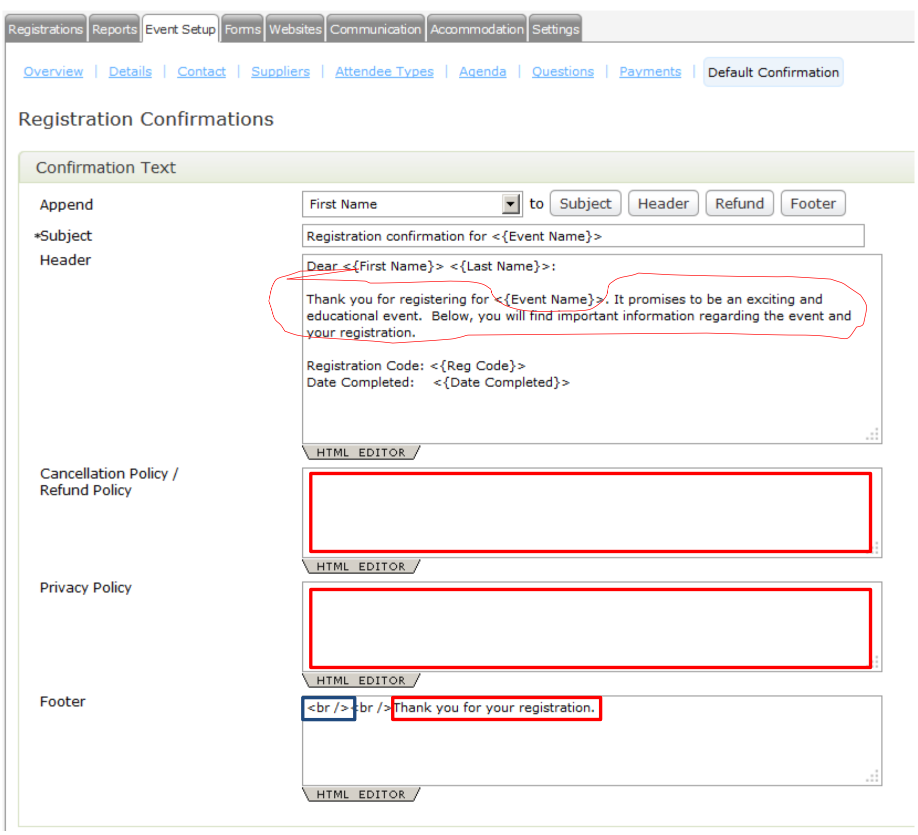


2. In the Registration Confirmations screen, notice that each section of the Confirmation Text can contain combinations of plain text and codes specific to your event's data (registration information surrounded curly braces enclosed by angle brackets). Using event code data is a way to include confirmation information that are dynamically driven by registration information submitted by event registrants or event data already captured when the event was setup.

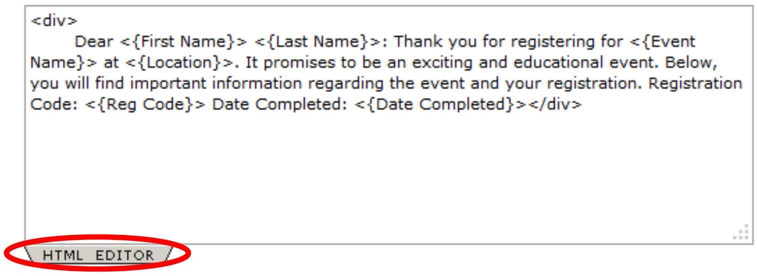
   You can edit any of the Confirmation Text for any of the following Subject, Header, Cancellation Policy/Refund Policy, Privacy Policy, or Footer according to your needs but special care must be taken when making changes to any event code data.

   In some sections of the Confirmation Text, you may also find HTML tags that are recognizable being surrounded by angle brackets (see a sample below highlighted by a blue box).

   a. For any plain text, simply editing and replacing the text with your own content is enough. In the sample below, we've highlighted the freeform text (in red) that can be overwritten/revised and/or added.

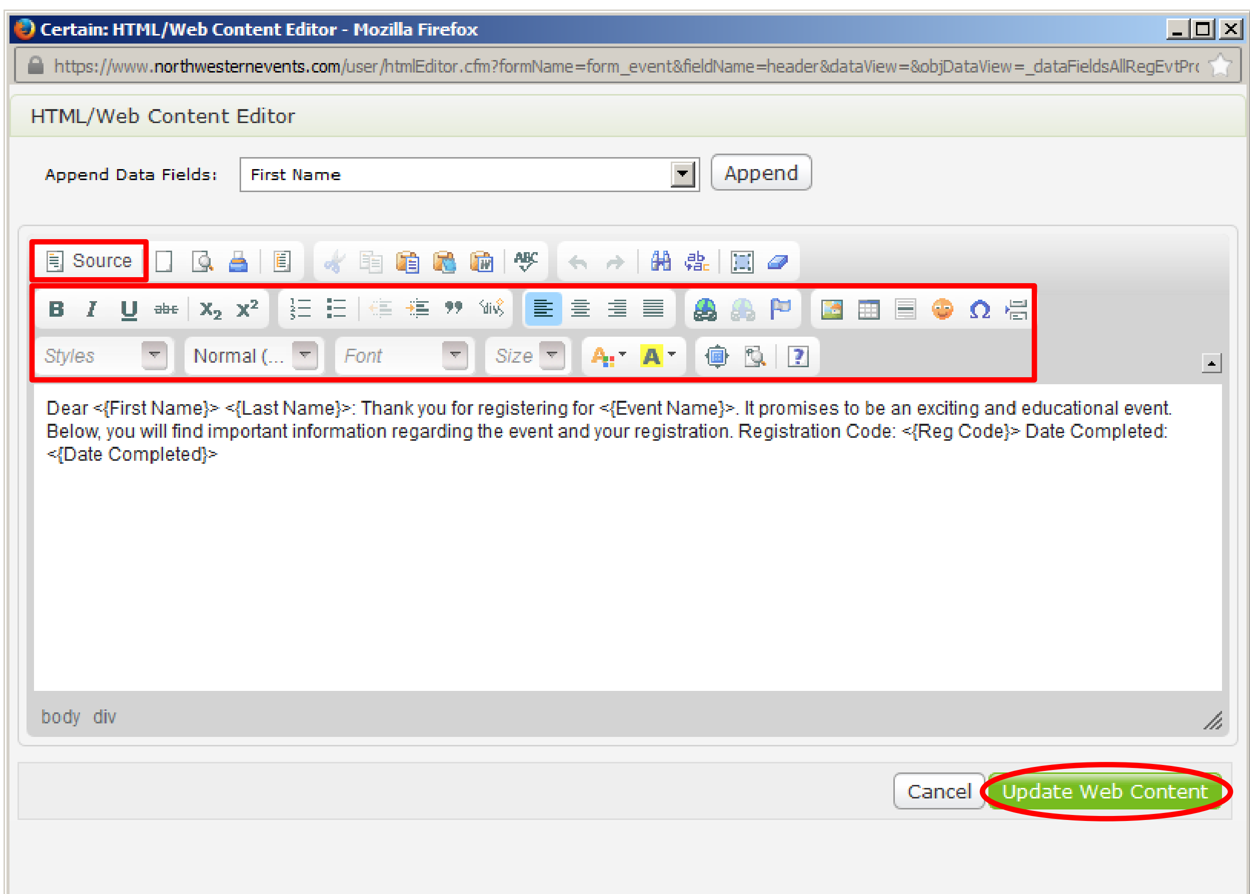


b. If you’d like to do more advanced editing of any portions of the Confirmation Text, click on the HTML Editor tab that appears underneath each section.



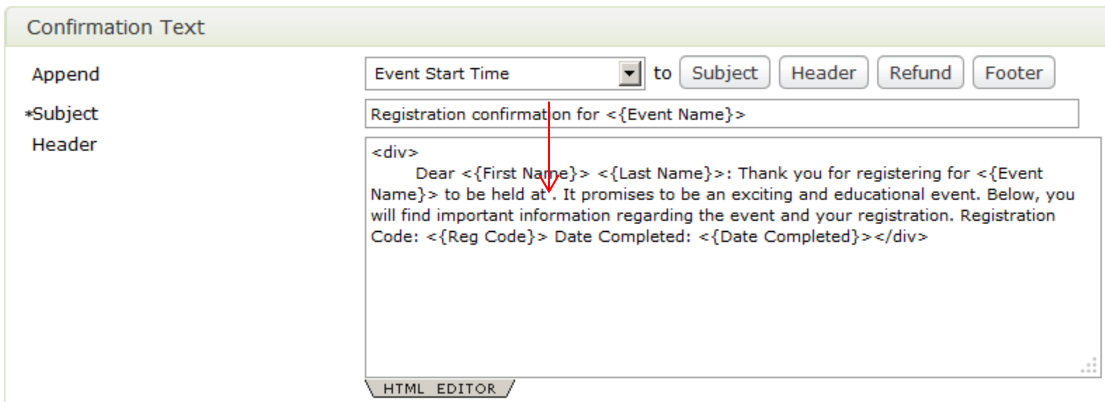
c. You can change formats, embed objects such as images, links, tables, etc. or use other features that you wouldn’t otherwise have access to. You can also switch from the GUI based editor to Source edit mode by clicking on the Source icon. Note that switching to Source mode requires knowledge of HTML.

Always remember to click on the Update Web Content button at the bottom when you are done making edits from this screen.

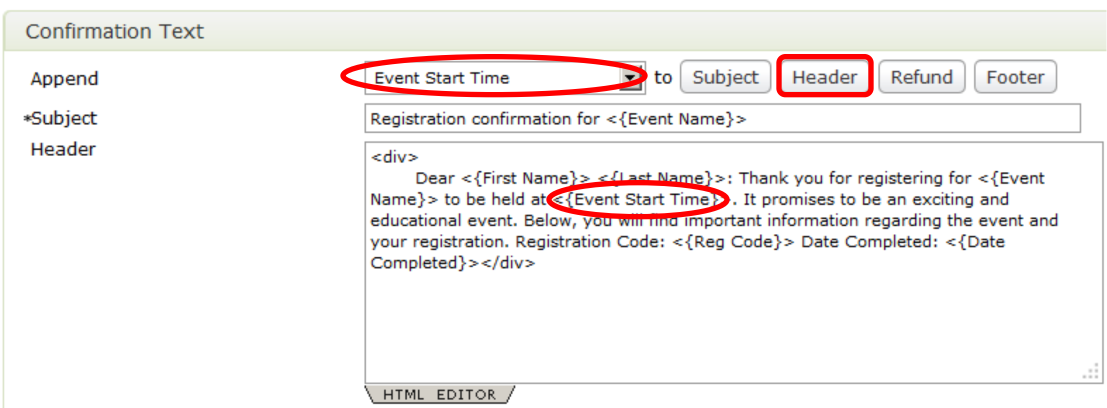


d. To use event code data, you must select the code from the Append dropdown, position your cursor in the appropriate section of the confirmation text, and then click on the button pertaining to the section that you are interested in adding the event code data to.

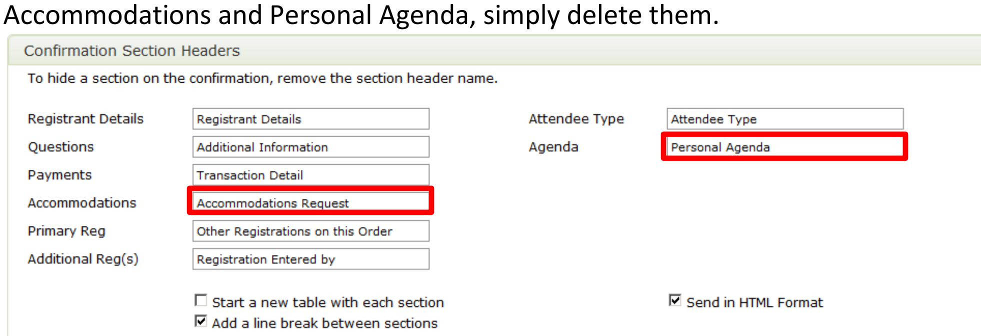
In the following example, we are adding the event's start time to the Header section of the Confirmation Text. First, position the cursor after the word 'at'.

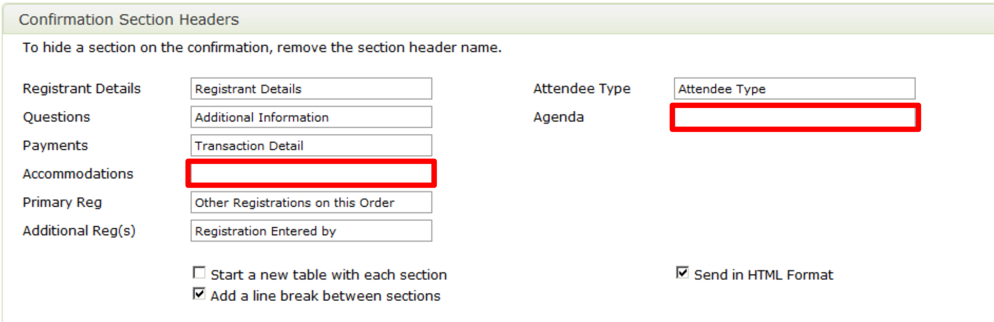


Then select 'Event Start Time' from the Append dropdown and click on the Header button to append the <{Event Start Time}> data to the default confirmation text.



3. Besides being able to modify confirmation text as outlined in all of the above steps, you can also pick and choose which Confirmation Sections you'd like to include. To do so, simply remove the Section Header name in the Confirmation Section Headers text box next to the Confirmation Section Header labels. For example to exclude Accommodations and Personal Agenda, simply delete them.



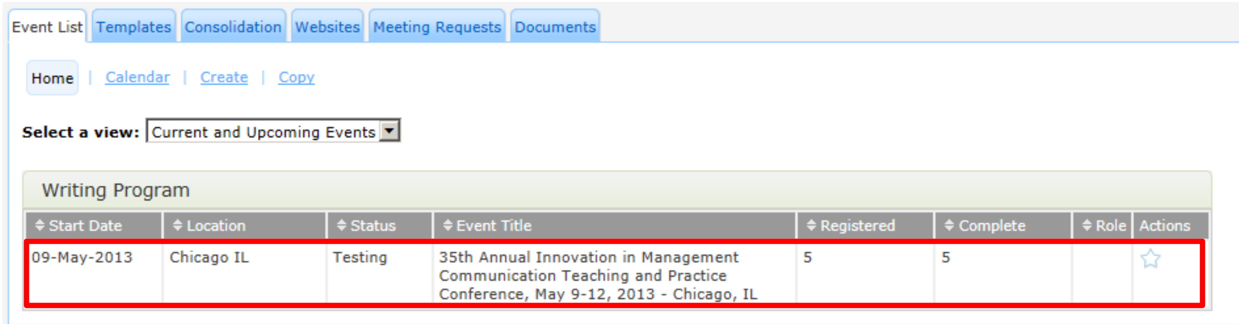


4. After making any modifications, remember to press the Save button to commit the changes.

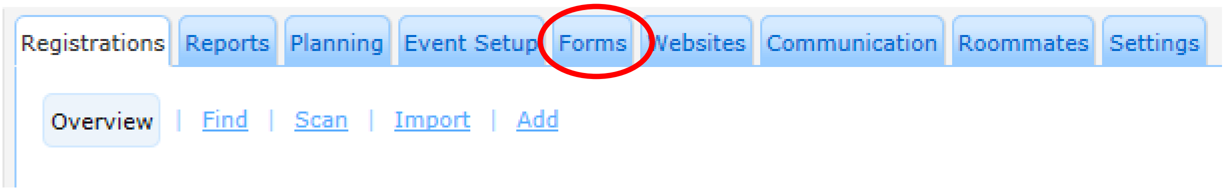
Switching a Certain Event Live

1. Logon to Certain

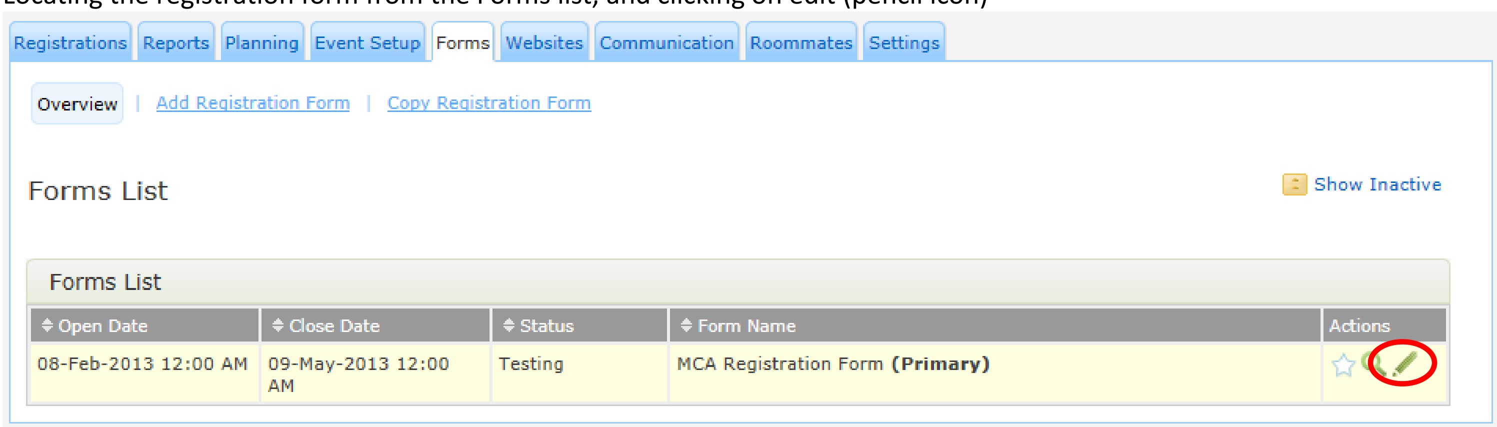
2. From the Event List tab, locate the event you'd like to go live with, hover your mouse anywhere over the event and then click on the event



3. Click on the Forms tab



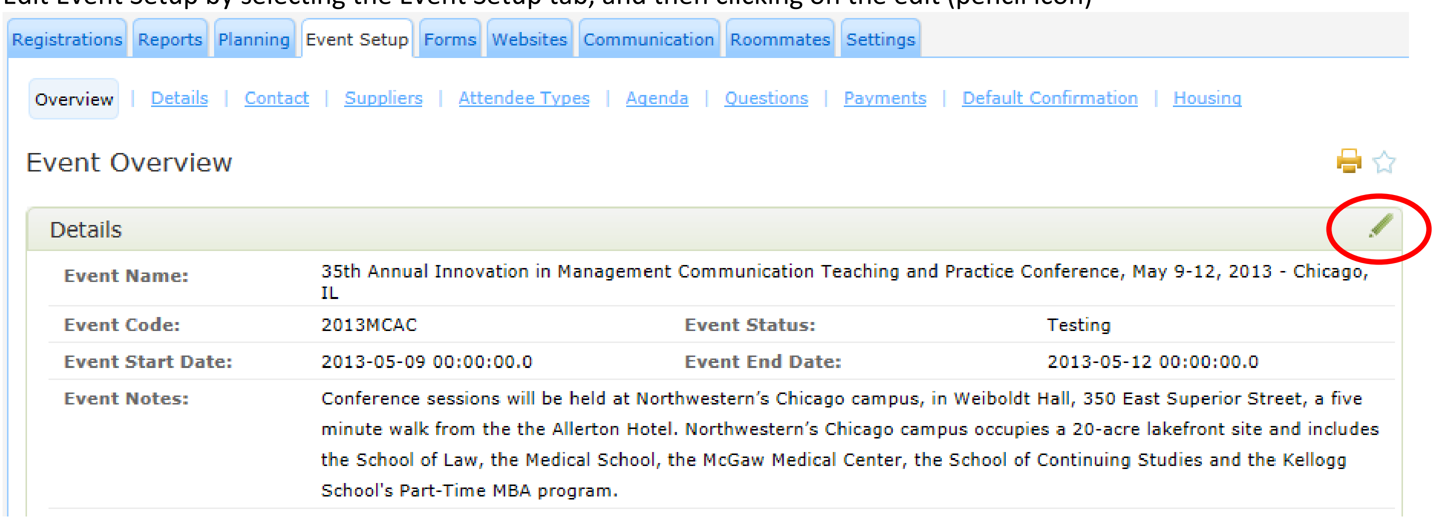
4. Disable Test mode by:
   a. Locating the registration form from the Forms list, and clicking on edit (pencil icon)



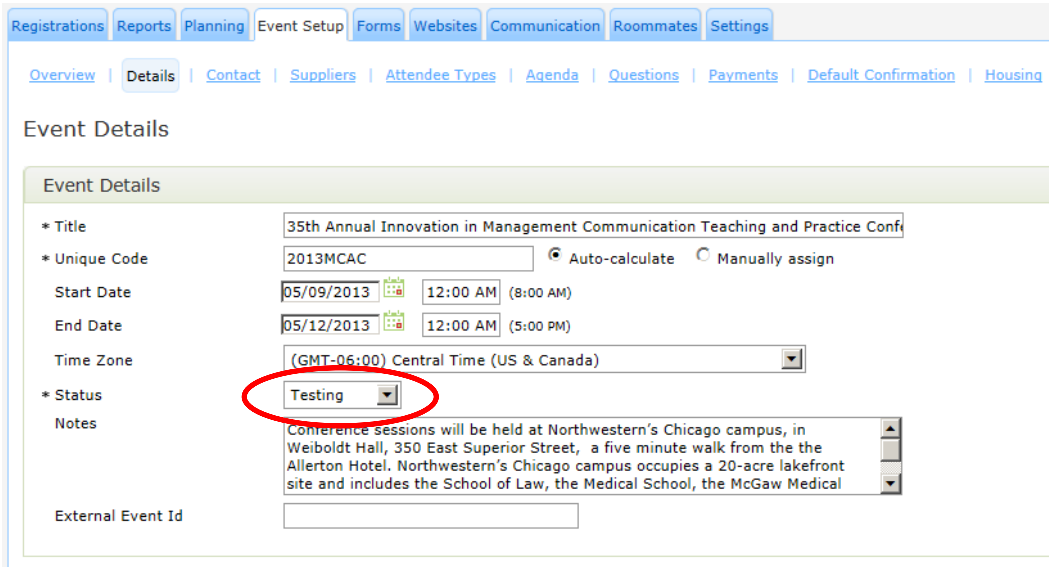
   b. From Form Setup, uncheck the Test mode check box

c. Save the change by clicking on the Save button at the very bottom of the Form Setup screen

5. Switch the event's status from Testing to Live by:
   a. Edit Event Setup by selecting the Event Setup tab, and then clicking on the edit (pencil icon)



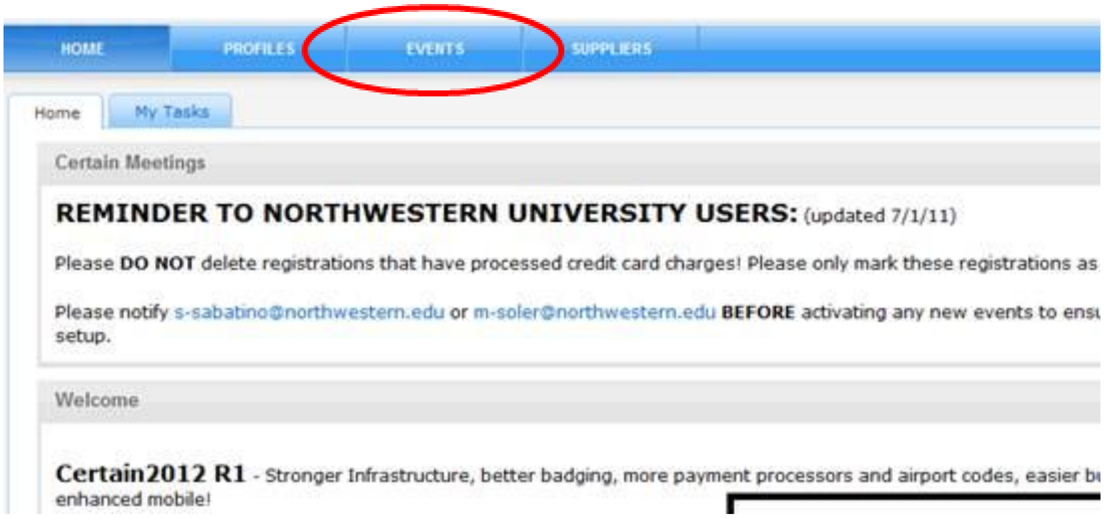
b. Select Live from the Status dropdown



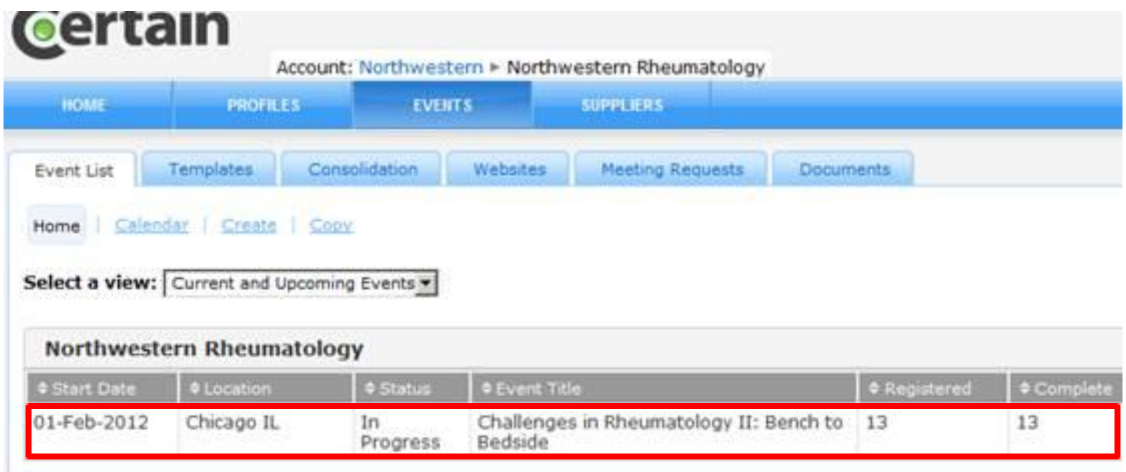
c. Save the change by clicking on the Save button at the very bottom of the screen.

Cancelling Registrations, Issuing Credits, and Refunding Credit Card Payments

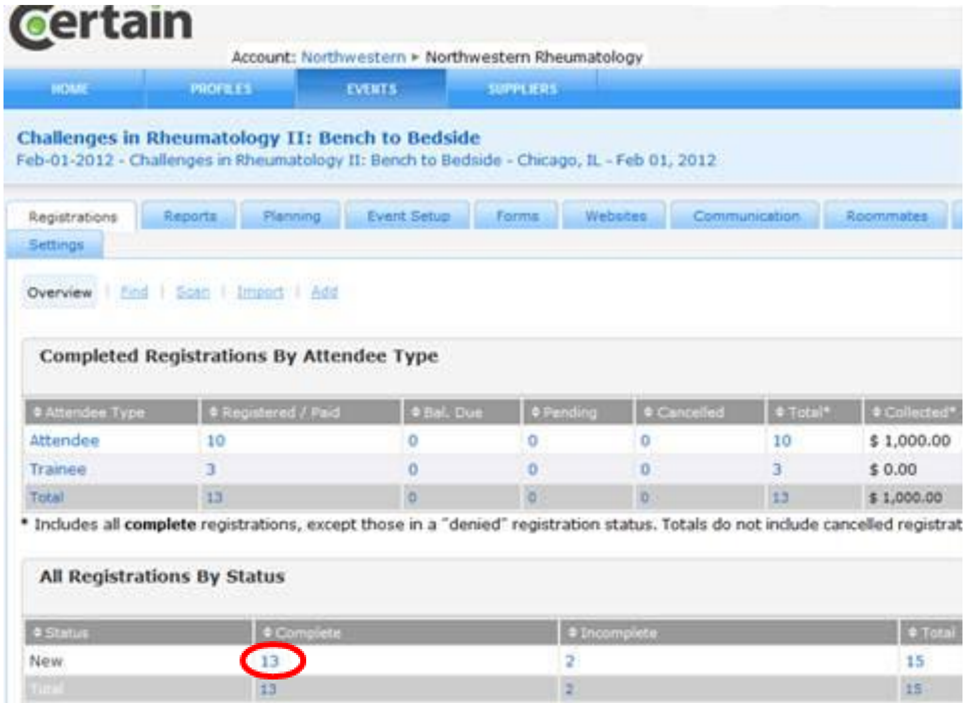
1. Logon to Certain and click on Events from the blue menu bar at the top



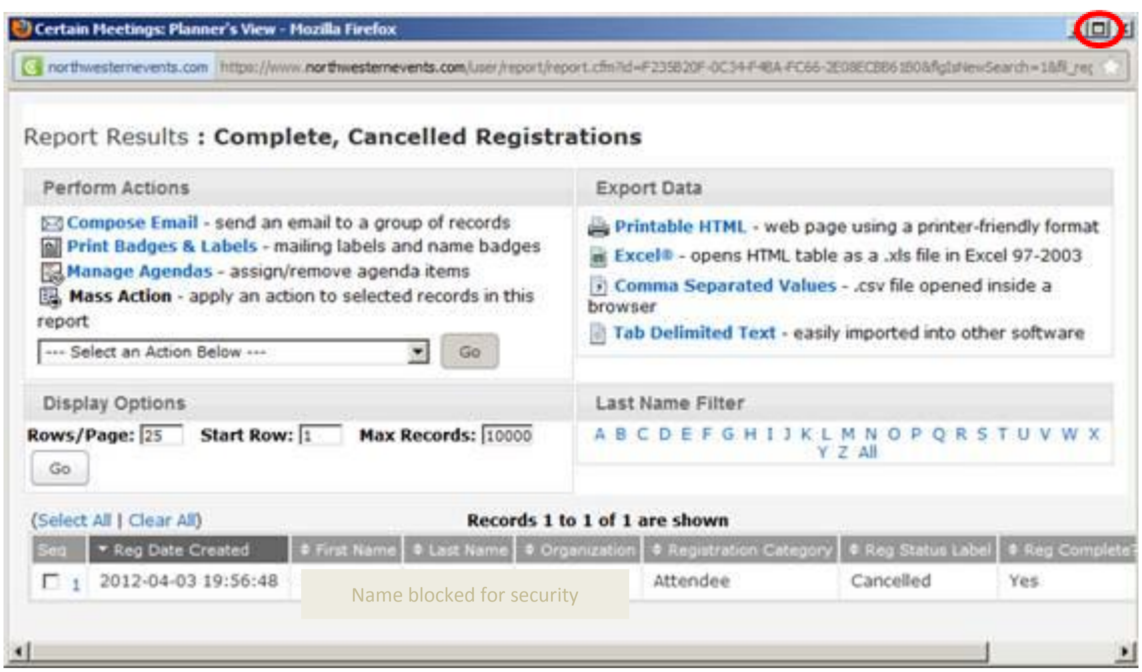
2. From the events list, hover your mouse over the event containing the registration/registrations that need/s to be cancelled and refunded, and then click anywhere on the event's listing.



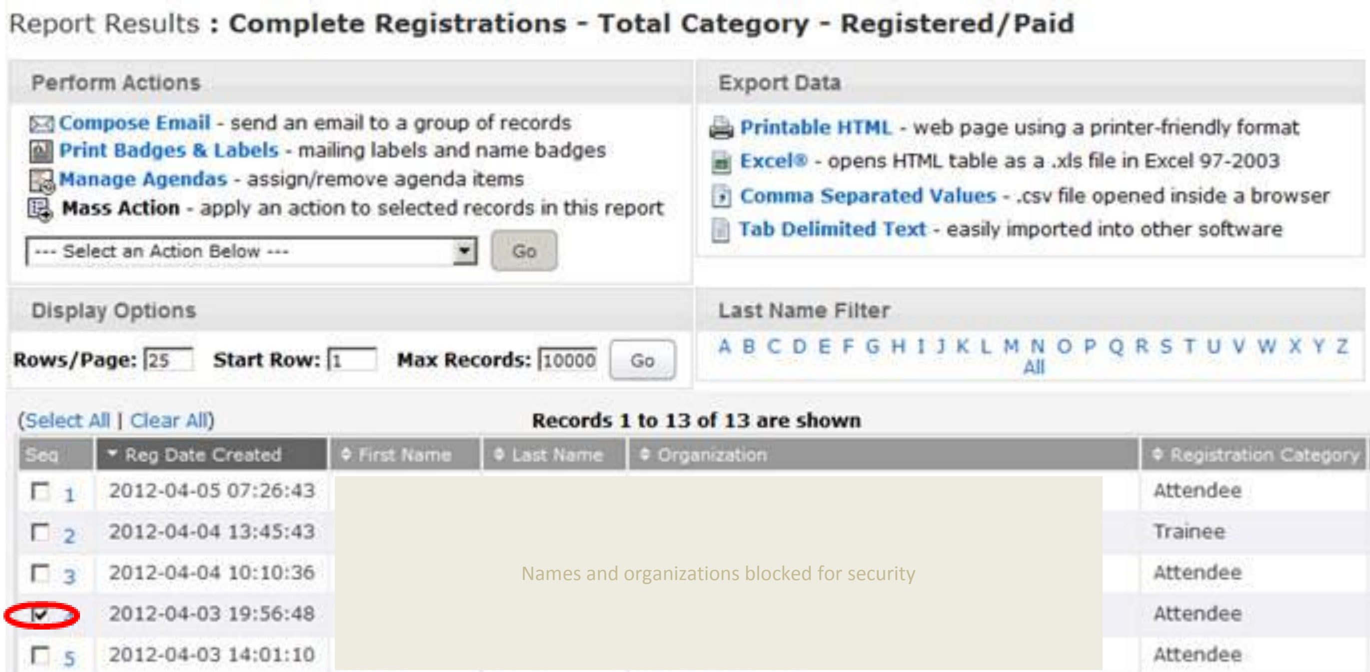
3. Select the Complete registrations by clicking on the total number of Complete registrations.



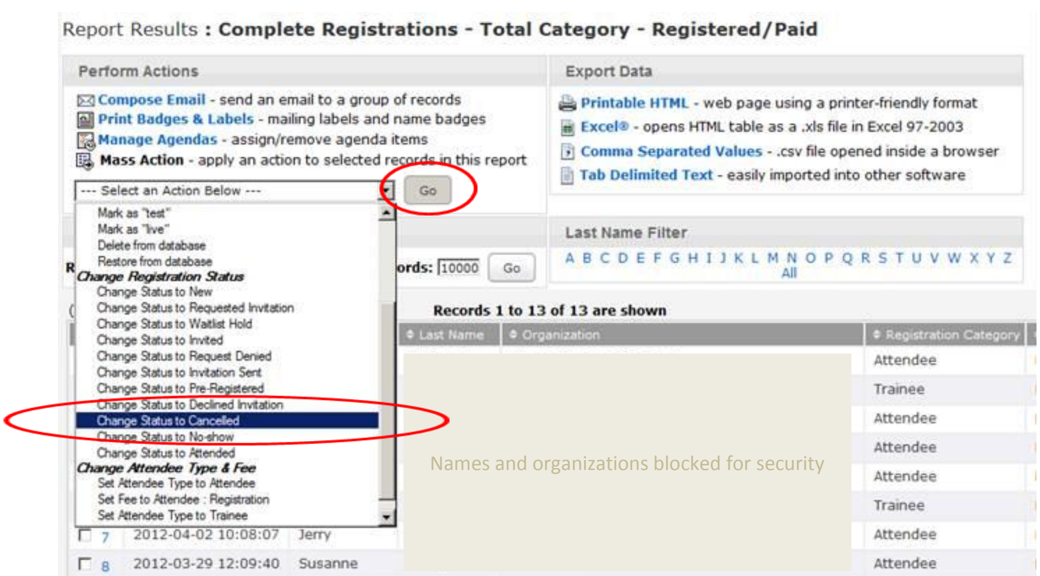
4. The Certain Meetings Planner's View Report Results window pops up. Maximize the popup window by clicking on the maximize button on the top right corner of the window.



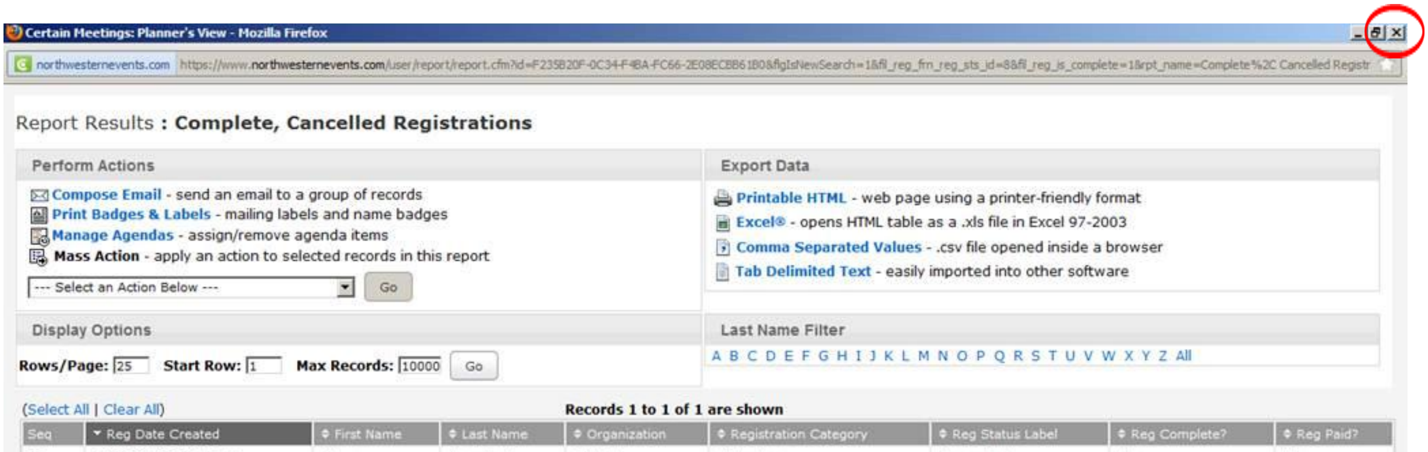
5. Select the individual/s whose registration/s need/s to be cancelled by clicking on the checkbox of the registration record/s (under the Seq column).



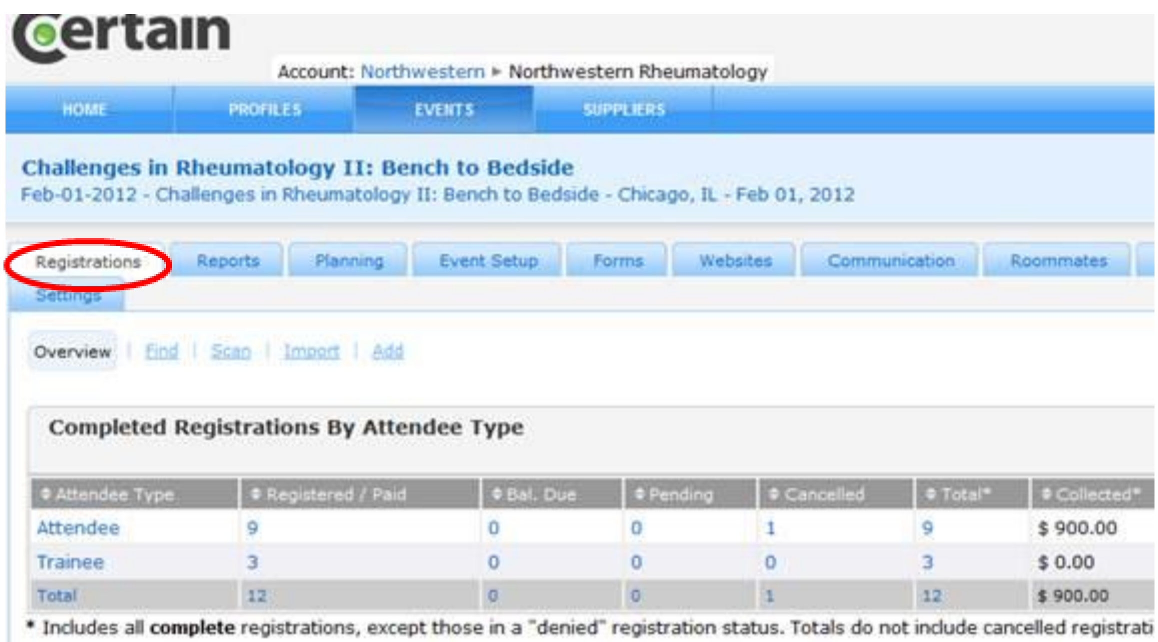
6. From the dropdown |--- Select an Action Below ---| , select "Change Status to Cancelled" and then press the Go button.



7. Close the popup window displaying the registrations by clicking on the “X” at the top right corner of the browser window”.

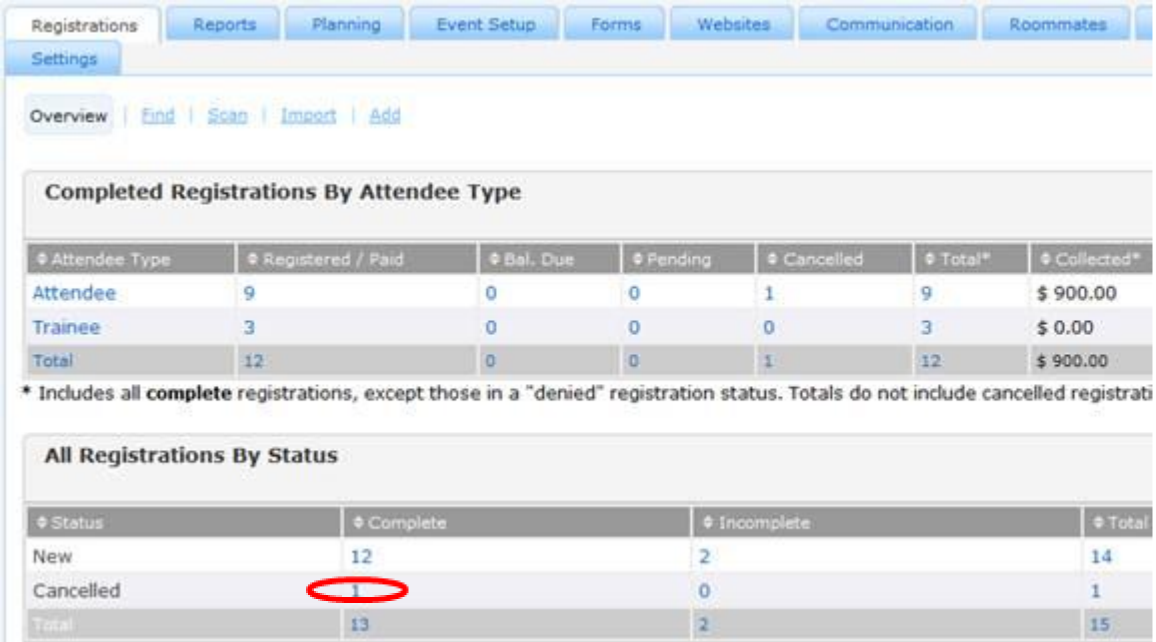


8. Refresh the registrations to display the new cancellations in the “All Registrations by Status” section, by clicking on the Registrations tab.



Cancelled registrations should have increased

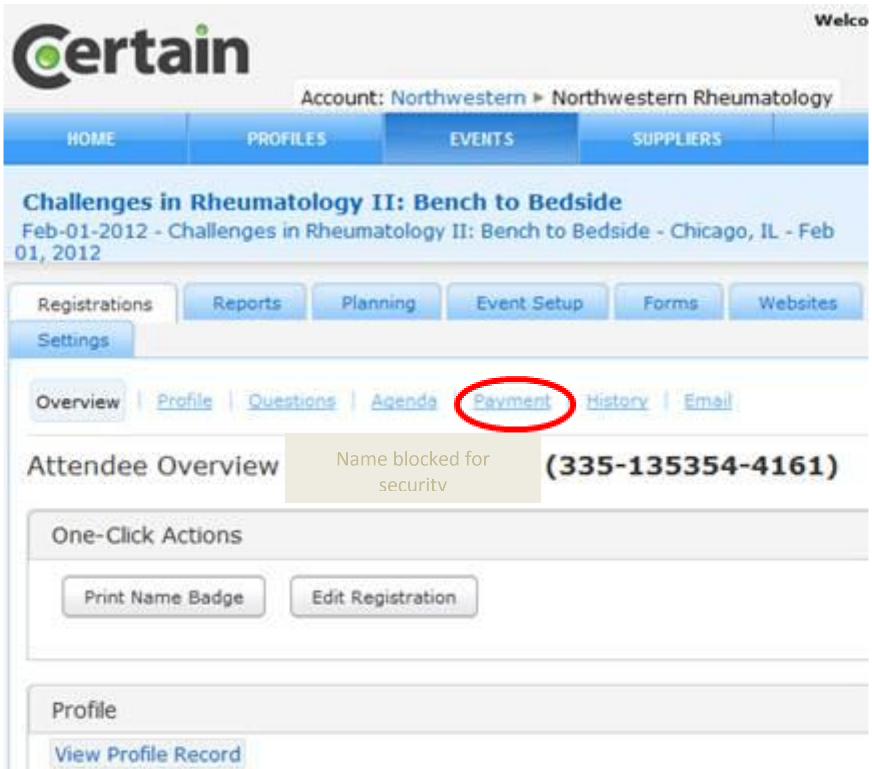
9. Click on the number of cancelled registrations to display the popup of cancelled registrations.



10. Refunds can be issued one at a time only. From the list of cancelled registrations, select an individual to issue a refund to by clicking the record number of the individual to refund.

11. Closing the Cancelled Registrations popup window will display the registration record of the individual to be refunded (it should be in the main browser window).

12. Click on the Payment link to display the List of Charges and List of Payments and Refunds.



13. On the List of Charges, if a credit exists, confirm that the amount is equal to the amount to be refunded. If it is, proceed to step 17.

14. If no credit exists, or if the amount is not the full amount to be refunded, you will need to create a credit balance that would create a net credit on the full amount to be refunded. Click on the ‘Add New’ button at the top right corner of the List of Charges.

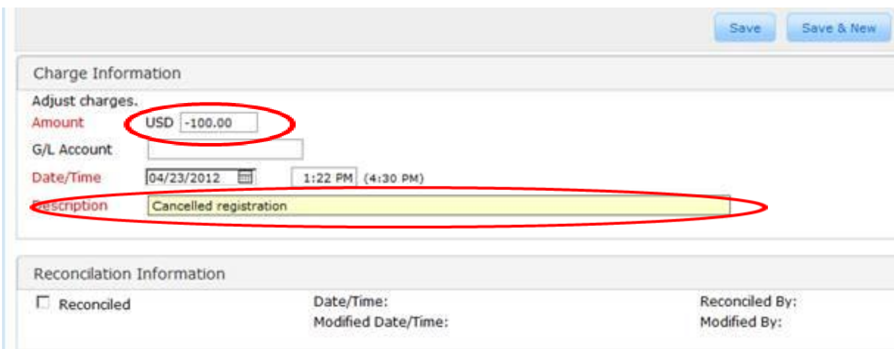

Save

List of Charges

Add New

Row	G/L Account	Date	Description	Type	Amount	Quantity	Total
1		Apr 3 2012	Attendee Registration	Fee	100.00	1	100.00

15. Enter the credit details: Amount and a description. Note that the amount should have a minus sign in order to effect a credit. Remember to press Save after.



16. From the Payment window Summary, you should see a credit balance equal to the amount to be refunded in the Balance Due section.


List of Charges

Add New

Row	G/L Account	Date	Description	Type	Amount	Quantity	Total
1		Apr 23 2012	Cancelled registration	Adjust Charge	-100.00	1	-100.00
2		Apr 23 2012	Guided Tour Guided Tour	Fee	50.00	-1	-50.00
3	110-1424000	Apr 23 2012	Regular Regular	Fee	100.00	1	100.00
4		Apr 23 2012	Guided Tour Guided Tour	Fee	50.00	1	50.00

List of Payments and Refunds

Add New

Row	G/L Account	Date	Description	Type	Amount	Received	Print	Online
1		Apr 23 2012	TEST-Martin Soler (Visa 1111)	CC	150.00	1	1	1

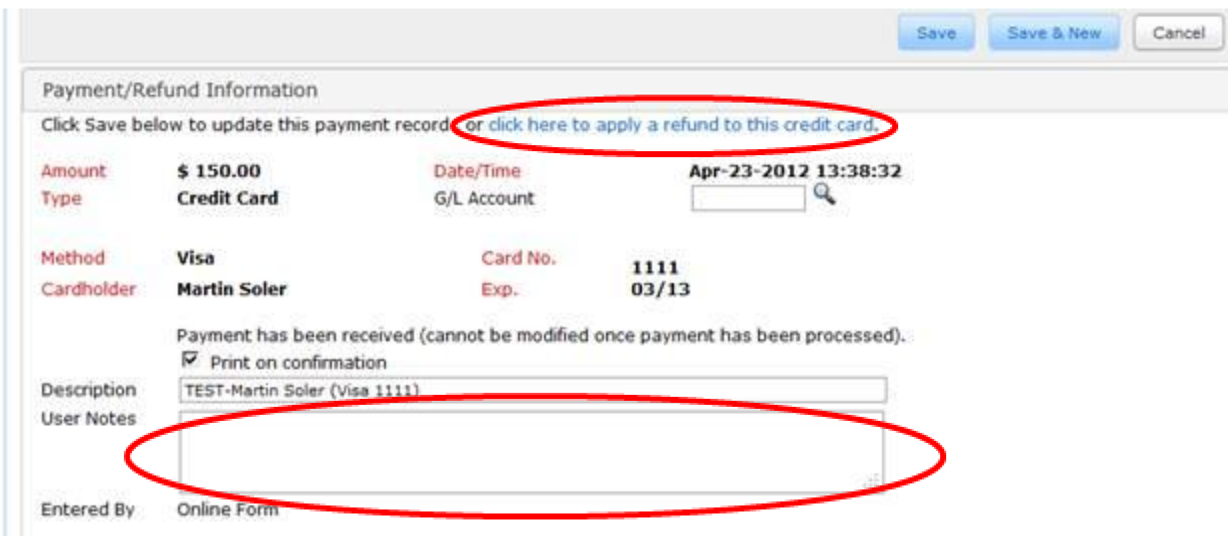
Summary

Charges	Transfer-Out	Adjustments		Refunds
100.00	0.00	Charges	Payments	0.00
		(100.00)	0.00	
Payments	Transfer-In	PO		Balance Due
150.00	0.00	0.00		(150.00)

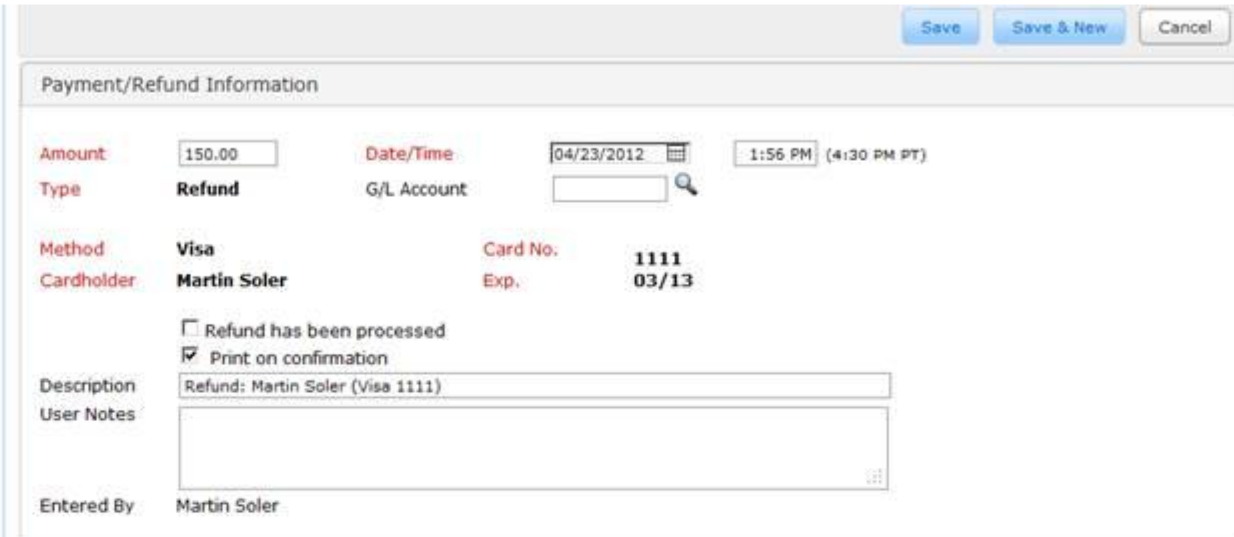
17. Issue a refund as follows:

  a. From the List of Payments and Refunds, click on the original credit card payment.

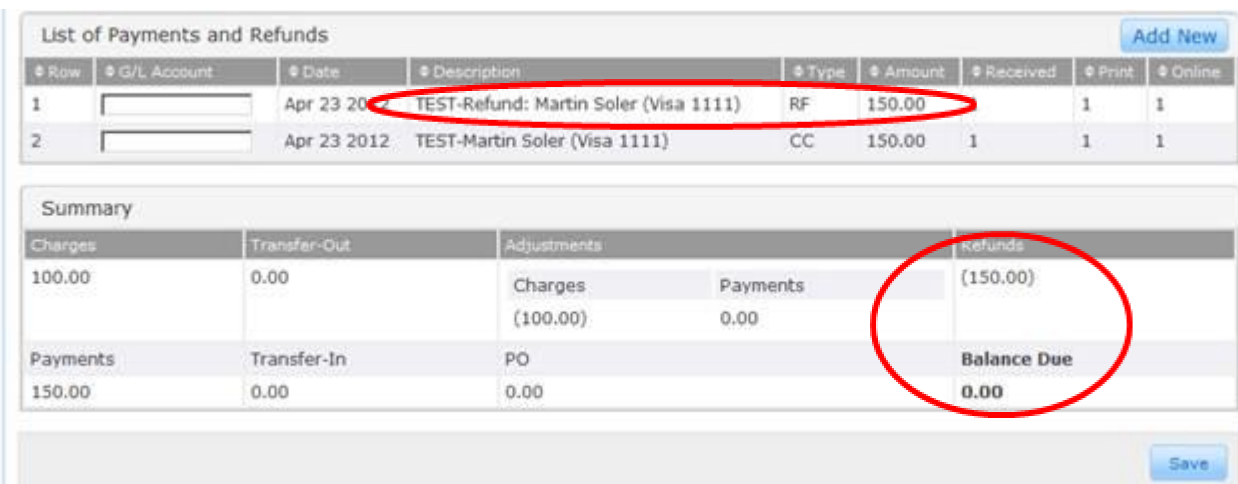
  b. Enter any notes in the User Notes box if desired, and then click on the link 'click here to apply a refund to this credit card.'



c. A window reflecting the refund will be displayed. Press the Save button to process the refund.
*** DO NOT CHECK THE BOX MARKED 'Refund has been processed' ***



d. The Payment window should now reflect the refund, and a total balance due of 0.

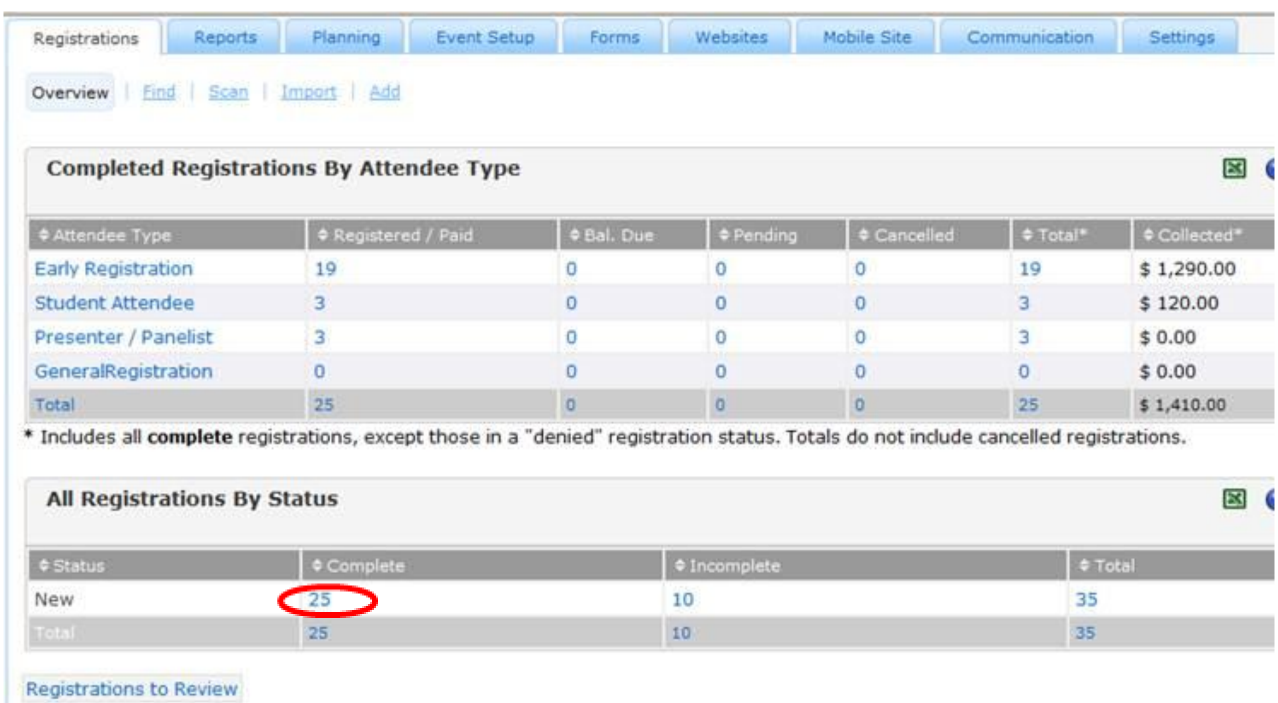


Revision History:
Modified 5/1/2012 – MS
Modified 9/13/2012 – MS
Modified 2/21/2013 – MS
Modified 6/4/2013 – MS

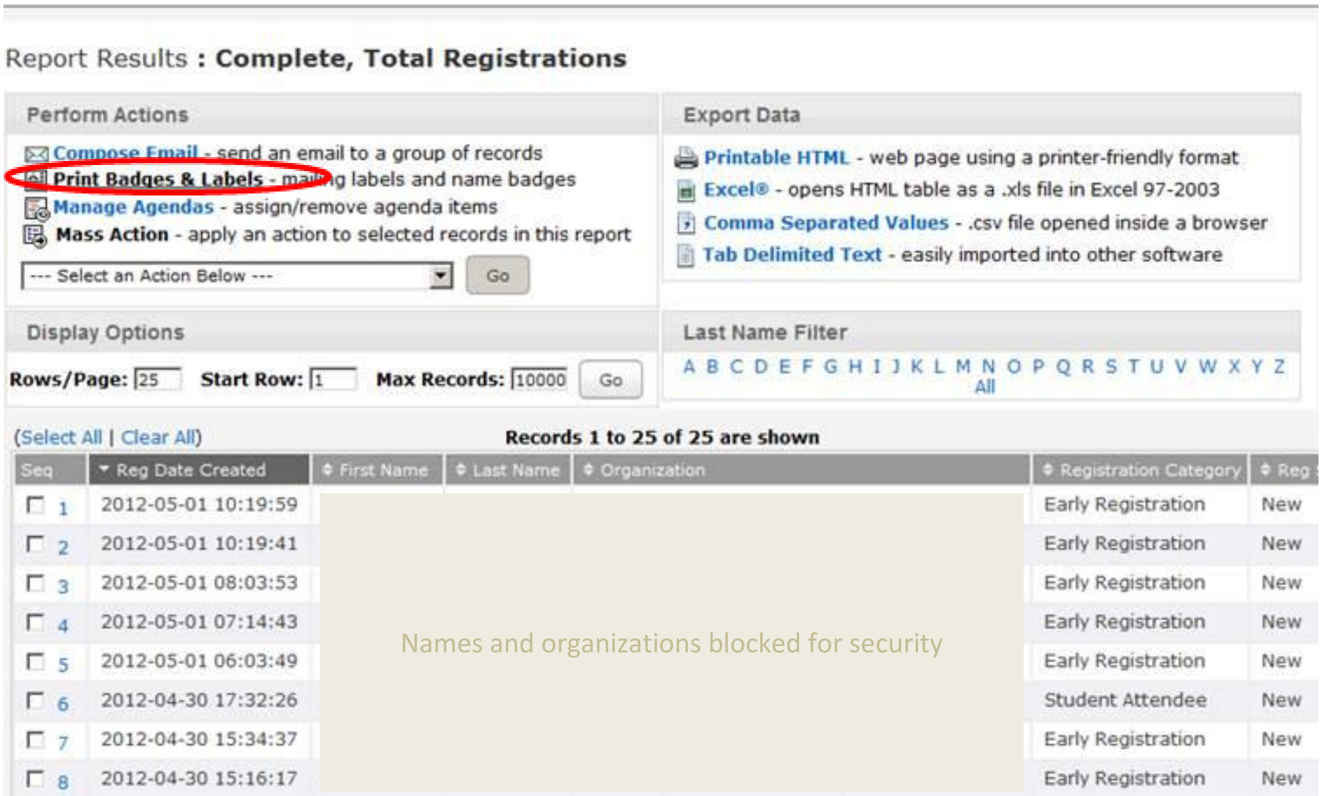
Configuring and creating name badges and labels

1. From the event, go to the Registrations tab.

2. Click on the number of completed registrations.

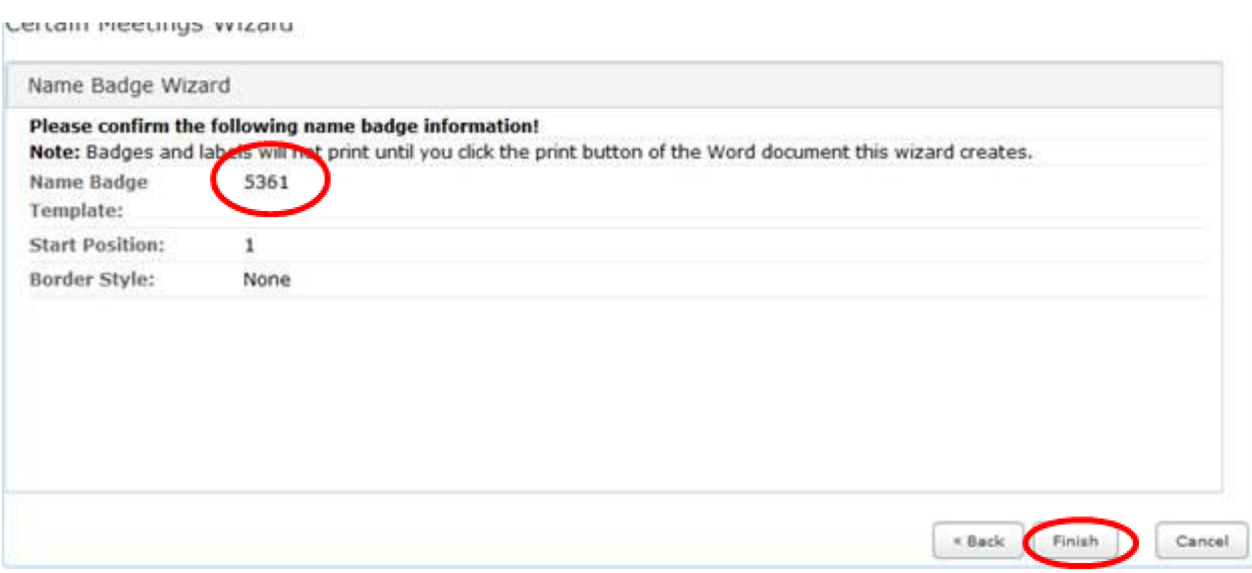


3. From the window that pops up (the report results window), click on Print Badges and Label to open the Name Badge Wizard



4. Configure the badges according to the needs of the event (fields, avery label type, etc.) and continue clicking the Next button until you are done with any of the configuration changes.

5. At the final configuration page, confirm that the Avery label type is displayed, and then click on the Finish button.



6. Microsoft Word will be launched with the labels displayed in the appropriate Avery Label format.

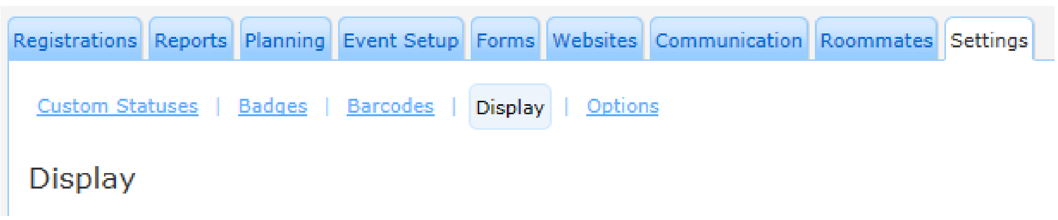
Revision History:
Modified: 2/21/2013 – MS

Remove the Default Footer

If you'd like your event to be branded with your own identity, chances are you'd much rather not have a standard footer that looks like this:

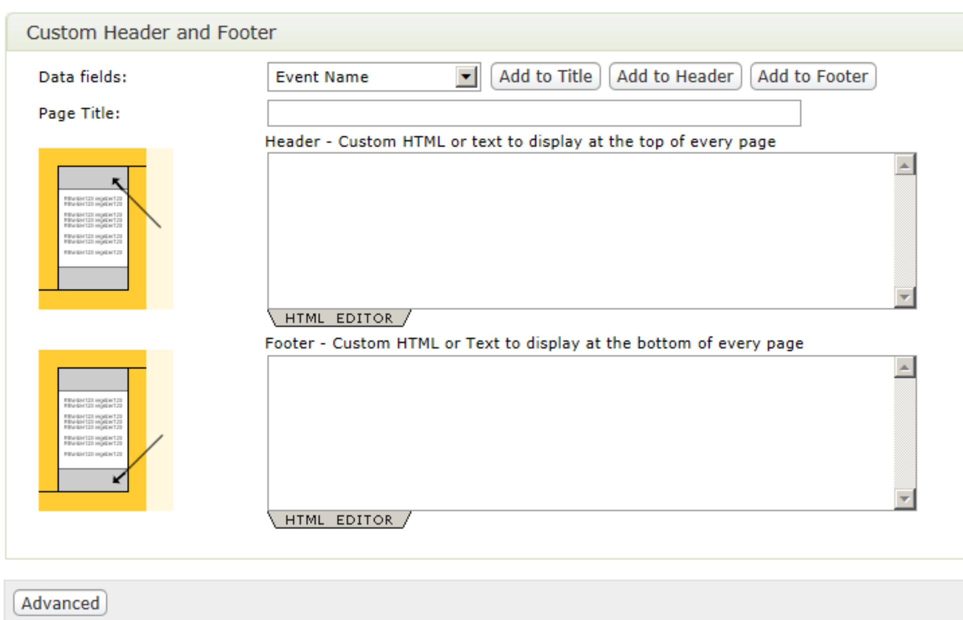
By following these few simple steps, you can eliminate the above default footer.

1. Go to the Event and click on the Settings tab



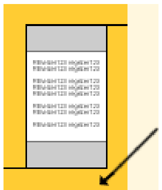
2. Click on Display

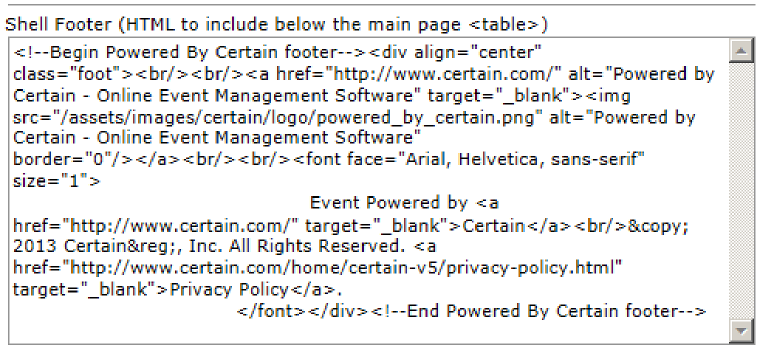
3. Scroll all the way to the bottom of the Display page to the 'Custom Header and Footer' section



4. Click on the Advanced button at the bottom

5. In the window that pops up, scroll to the ‘Custom HTML Shell’ section, more specifically, to the section ‘Shell Footer (HTML to include below the main page <table>)’





```
Shell Footer (HTML to include below the main page <table>)
<!--Begin Powered By Certain footer--><div align="center"
class="foot"><br/><br/><a href="http://www.certain.com/" alt="Powered by
Certain - Online Event Management Software" target="_blank"><img
src="/assets/images/certain/logo/powered_by_certain.png" alt="Powered by
Certain - Online Event Management Software"
border="0"/></a><br/><br/><font face="Arial, Helvetica, sans-serif"
size="1">
                    Event Powered by <a
href="http://www.certain.com/" target="_blank">Certain</a><br/>&copy;
2013 Certain&reg;, Inc. All Rights Reserved. <a
href="http://www.certain.com/home/certain-v5/privacy-policy.html"
target="_blank">Privacy Policy</a>.
               </font></div><!--End Powered By Certain footer-->
```

6. Either comment out all of the HTML or delete the HTML

7. Press Save

Your event should no longer have the default “Powered by Certain” displayed on the footer.