

How to register individuals and their guests on behalf of your organization.

31 Steps [View most recent version](#) 

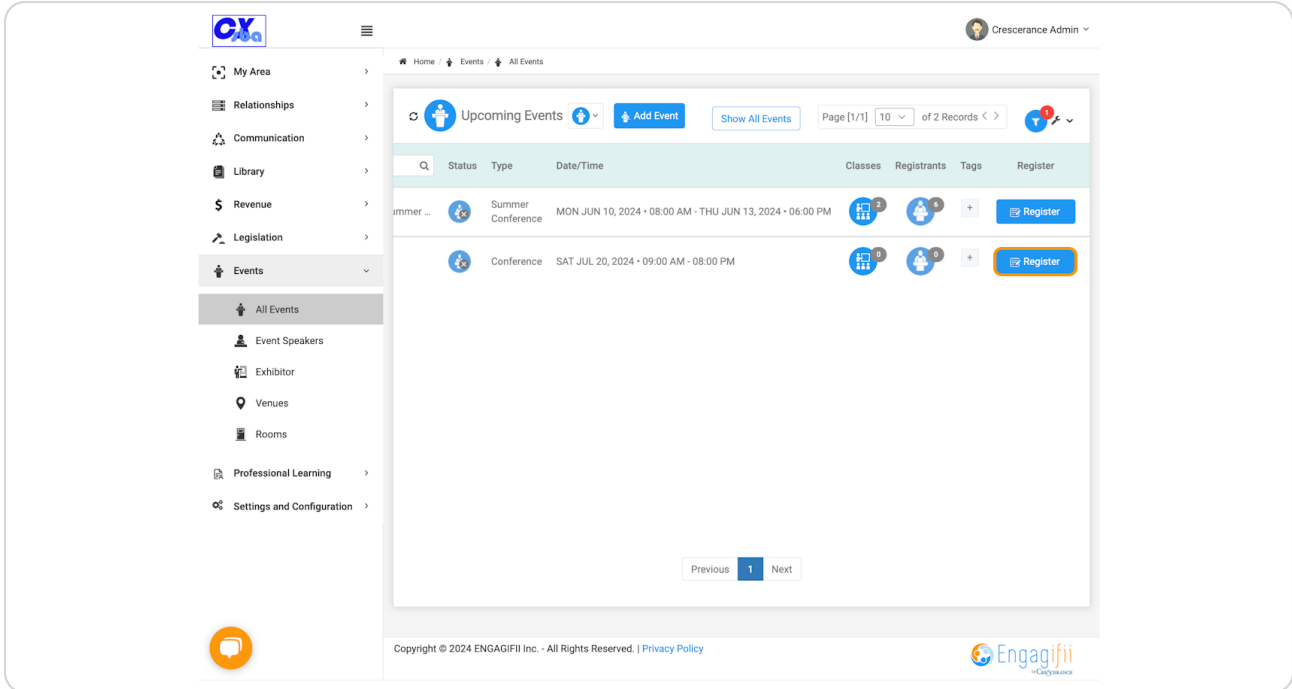
Created by
Engagifii Inc.

Creation Date
February 19, 2024

Last Updated
February 19, 2024

STEP 1

Click on Register



The screenshot displays the XSBA Events dashboard interface. On the left is a sidebar menu with options: My Area, Relationships, Communication, Library, Revenue, Legislation, Events (selected), All Events, Event Speakers, Exhibitor, Venues, Rooms, Professional Learning, and Settings and Configuration. The main content area is titled 'Upcoming Events' and includes an 'Add Event' button, a 'Show All Events' link, and pagination information (Page 1/1, 10 of 2 Records). A table lists upcoming events with columns for Status, Type, Date/Time, Classes, Registrants, Tags, and a Register button. The first event is 'Summer Conference' on 'MON JUN 10, 2024 - THU JUN 13, 2024' with 2 classes and 2 registrants. The second event is 'Conference' on 'SAT JUL 20, 2024' with 0 classes and 2 registrants. The 'Register' button for the second event is highlighted with a yellow border. At the bottom, there is a footer with copyright information (Copyright © 2024 ENGAGIFII Inc.) and the Engagifii logo.

Status	Type	Date/Time	Classes	Registrants	Tags	Register
	Summer Conference	MON JUN 10, 2024 - THU JUN 13, 2024	2	2		Register
	Conference	SAT JUL 20, 2024	0	2		Register

STEP 2

Click on Next

[illegible]

STEP 3

Select individuals from your organization to register

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t Speakers

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es

ns

Alex Administrator-)

Sarah Anderson

Tara Banks

Bob Billing

Rhonda Billing

STEP 4

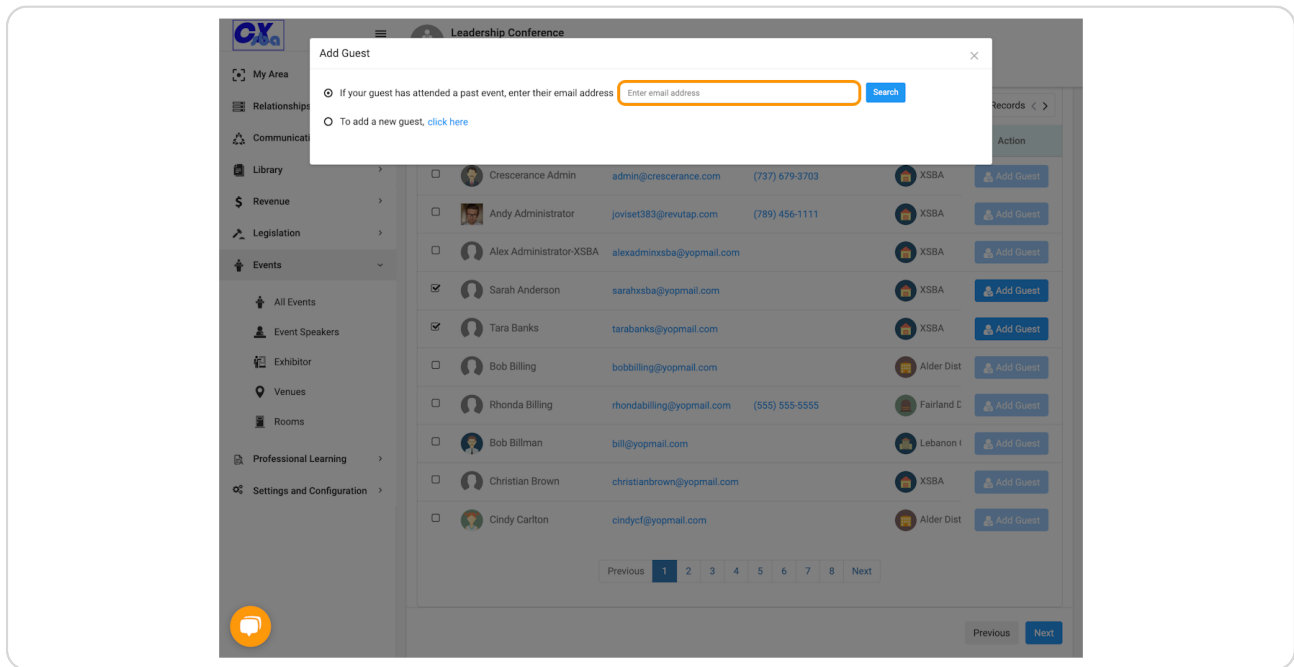
Select individuals from your organization to register

STEP 5

Click on Add Guest on the individual bringing a guest.

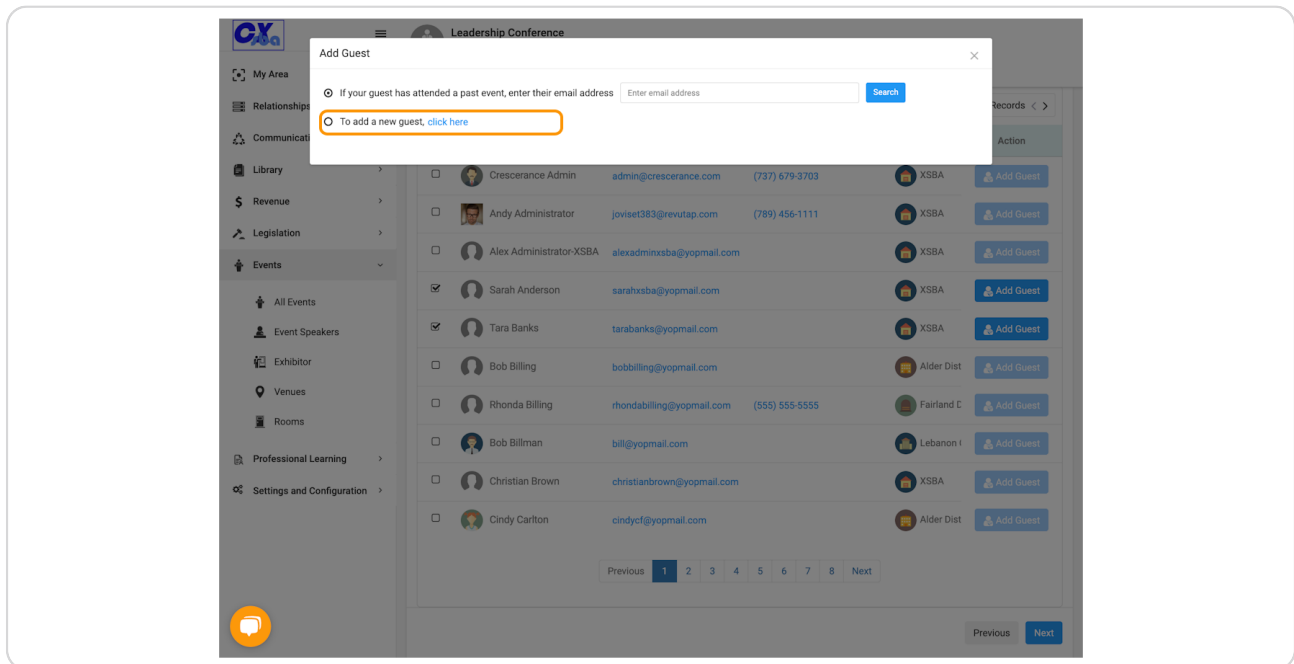
STEP 6

If the guest has attended previously then search their email address here



STEP 7

If this is a new guest click to add a new guest



STEP 8

Enter Guest Information

Leadership Conference

New Person (Non-Member | Non-Member)

Salutation

First Name *

Middle Name

Select

Timothy

Person Type

Non-Member

Tag(s): +

Contact Details

Email Address * Primary

Phone Nu

Enter text

Enter a

STEP 9

Enter Guest Information

Last Name *

Suffix

Turner

Select

STEP 10

Enter Guest Information

Salutation First Name * Middle Name Last Name *

Select Timothy Turner

Person Type

Non-Member

Tag(s): +

Contact Details

Email Address * Primary Phone Number

timturn@yopmail.com Enter a number

Don't have an Email Address ? [Click here](#)

Organization

Organization Name Search Organization Name(s)

STEP 11

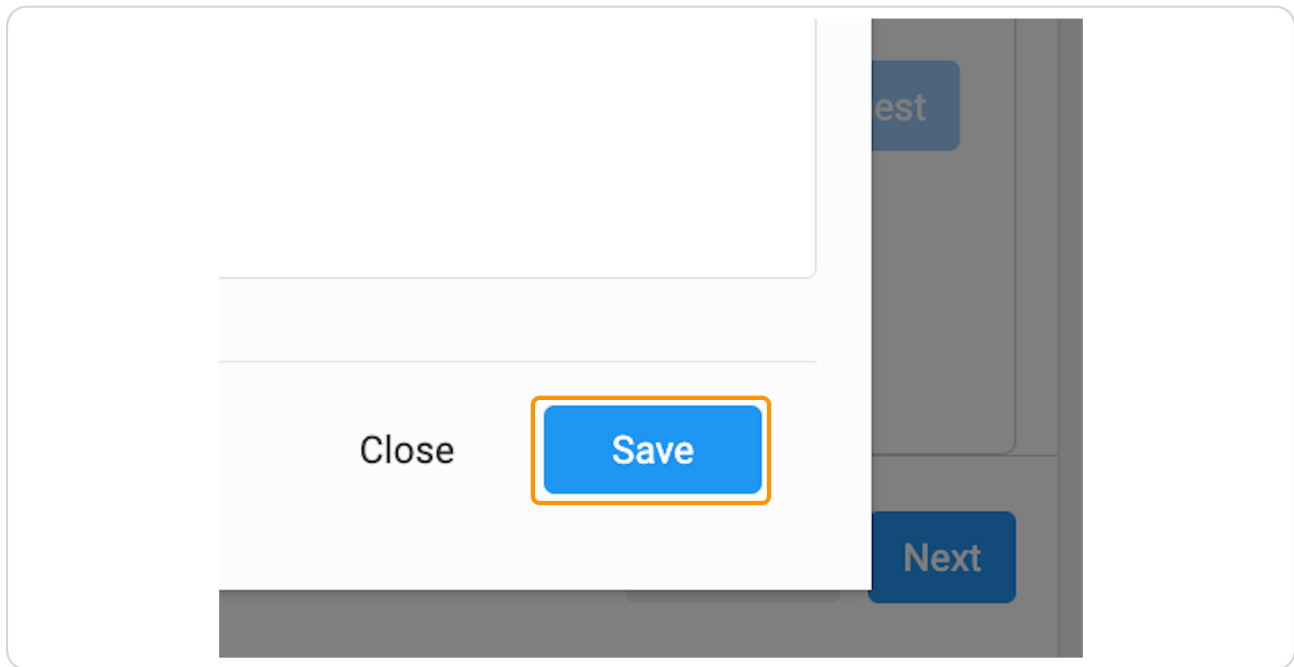
Enter Guest Information

Phone Number

7774443

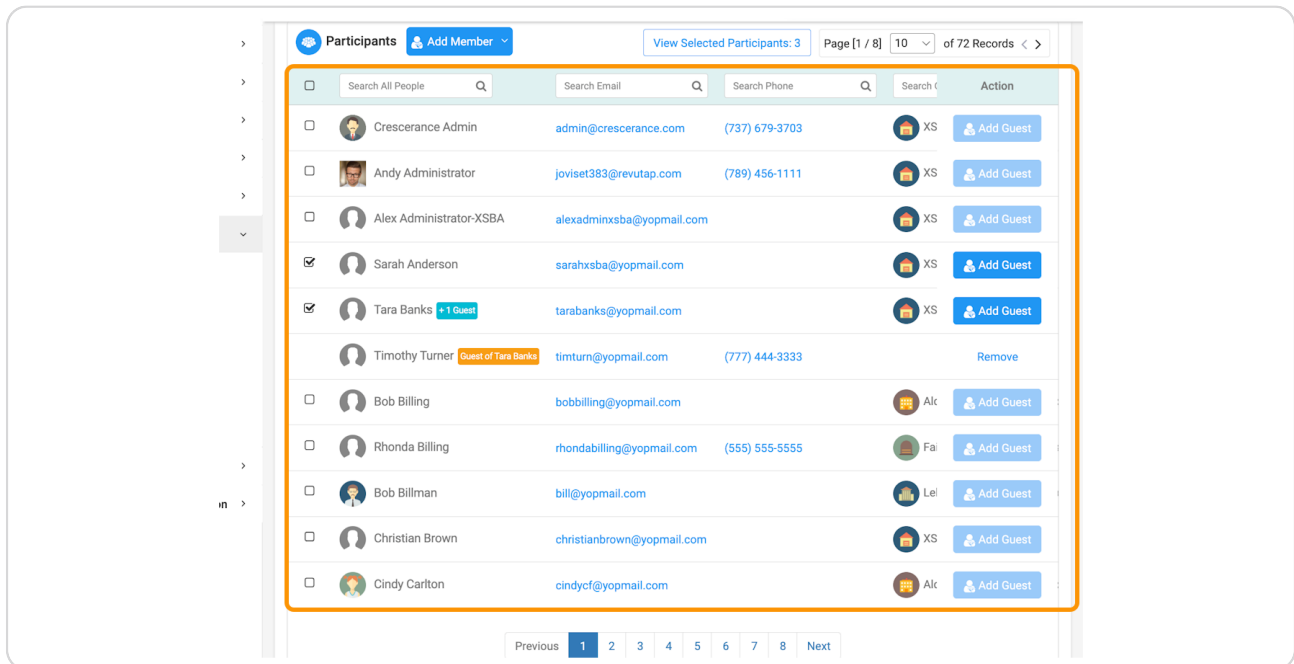
STEP 12

Click on Save



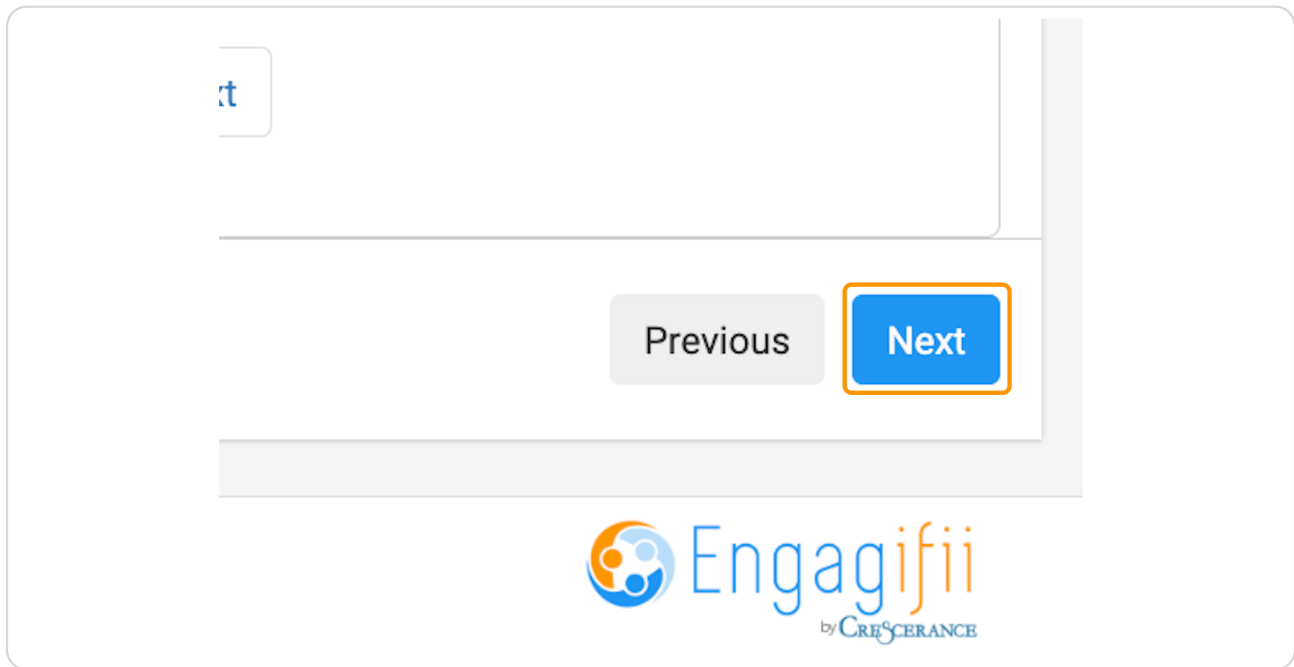
STEP 13

Here you have your attendees and their guests selected.



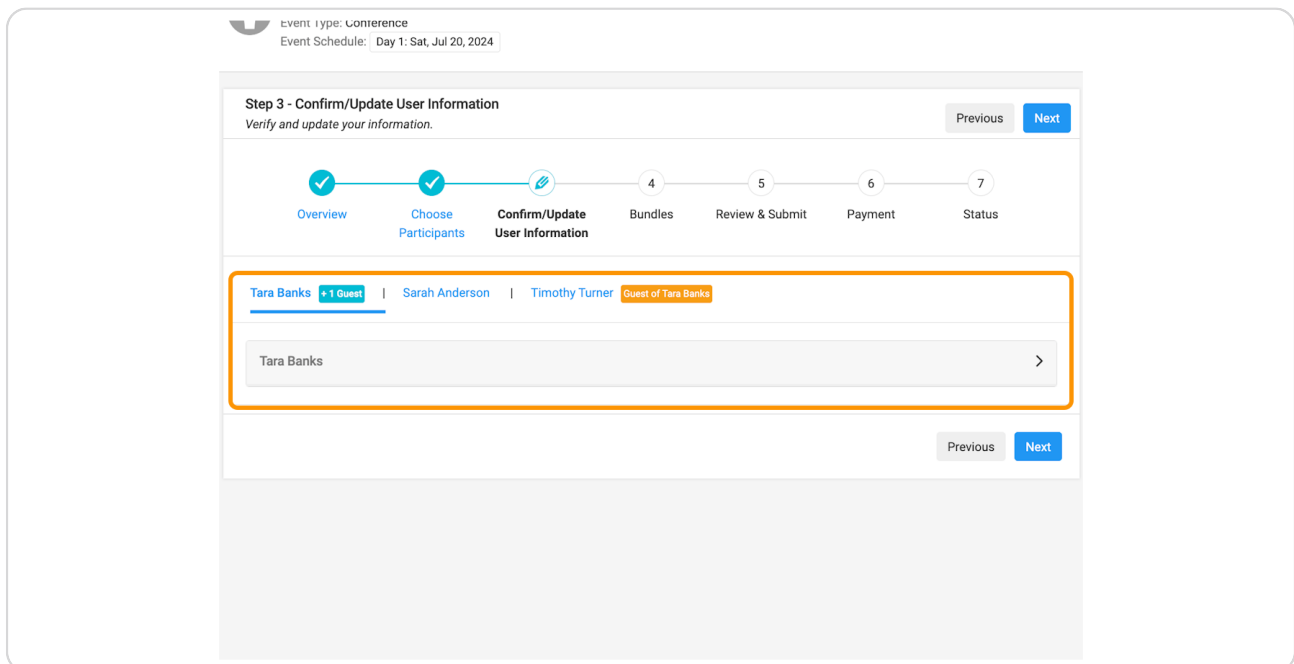
STEP 14

Click on Next



STEP 15

You can confirm the information of each of your attendees and guests



STEP 16

Click on Next

The screenshot shows a navigation bar with two buttons: 'Previous' and 'Next'. The 'Next' button is highlighted with an orange border. Below the buttons is a progress indicator with three steps: 5 (Review & Submit), 6 (Payment), and 7 (Status). Step 6 is currently active.

STEP 17



Select the bundles or options for each attendee and guest

The screenshot shows a 'User Information' section. At the top, there is a search bar and a user profile for Sarah Anderson. Below this is a table with columns for 'Select', 'Unit Price', and 'Item(s)'. The table lists two 'Conference Package' items. The first item has a unit price of \$800.00 and is not selected. The second item has a unit price of \$600.00 and is selected, indicated by an orange border around the checkbox. The total price for the selected item is \$0.00.

Select	Unit Price	Item(s)
<input type="checkbox"/>	\$800.00	Conference Package
<input checked="" type="checkbox"/>	\$600.00	Conference Package
		Item(s) \$0.00


STEP 18

Select the bundles or options for each attendee and guest

<input type="text"/>			 Tara Banks + 1 Guest
	<input type="checkbox"/>	Select	Unit Price
	<input type="checkbox"/>		\$800.00
	<input type="checkbox"/>		\$600.00
00.00			
Item(s)		\$0.00	

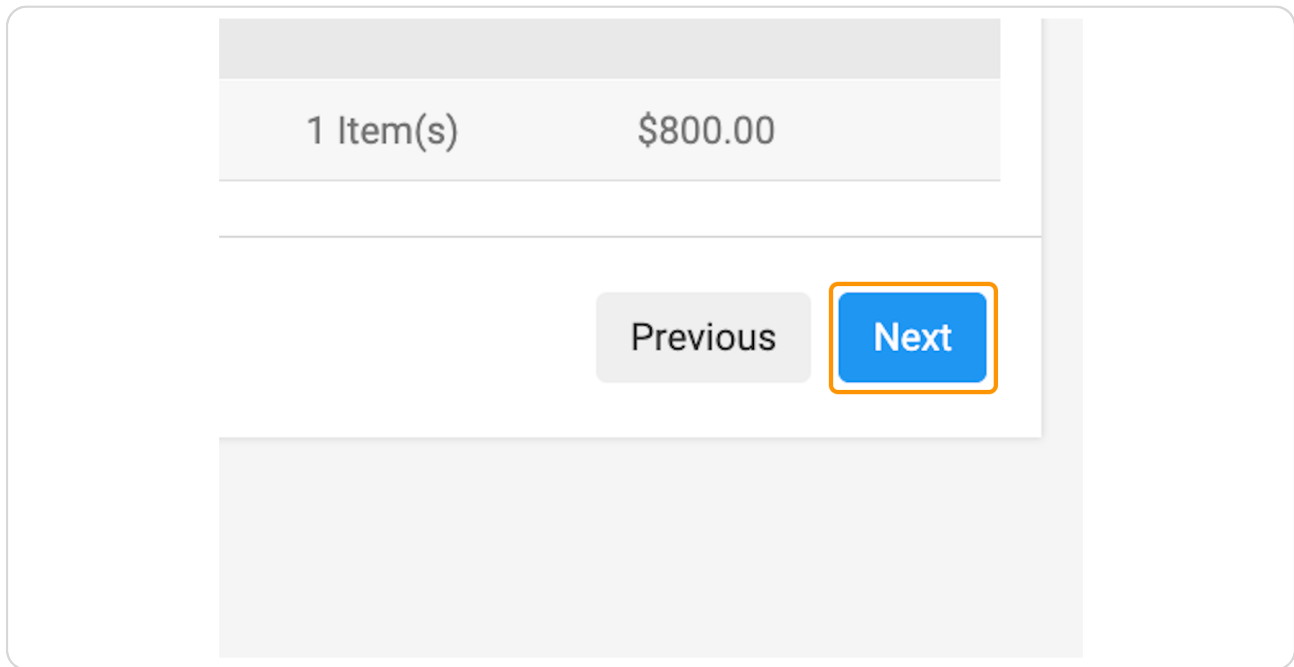
STEP 19

Select the bundles or options for each attendee and guest

		 Timothy Turner Guest of Tara Banks	
	<input type="checkbox"/>	Select	Unit Price
	<input type="checkbox"/>		\$800.00
	<input type="checkbox"/>		\$600.00
0 Item(s)		\$0.00	

STEP 20

Click on Next

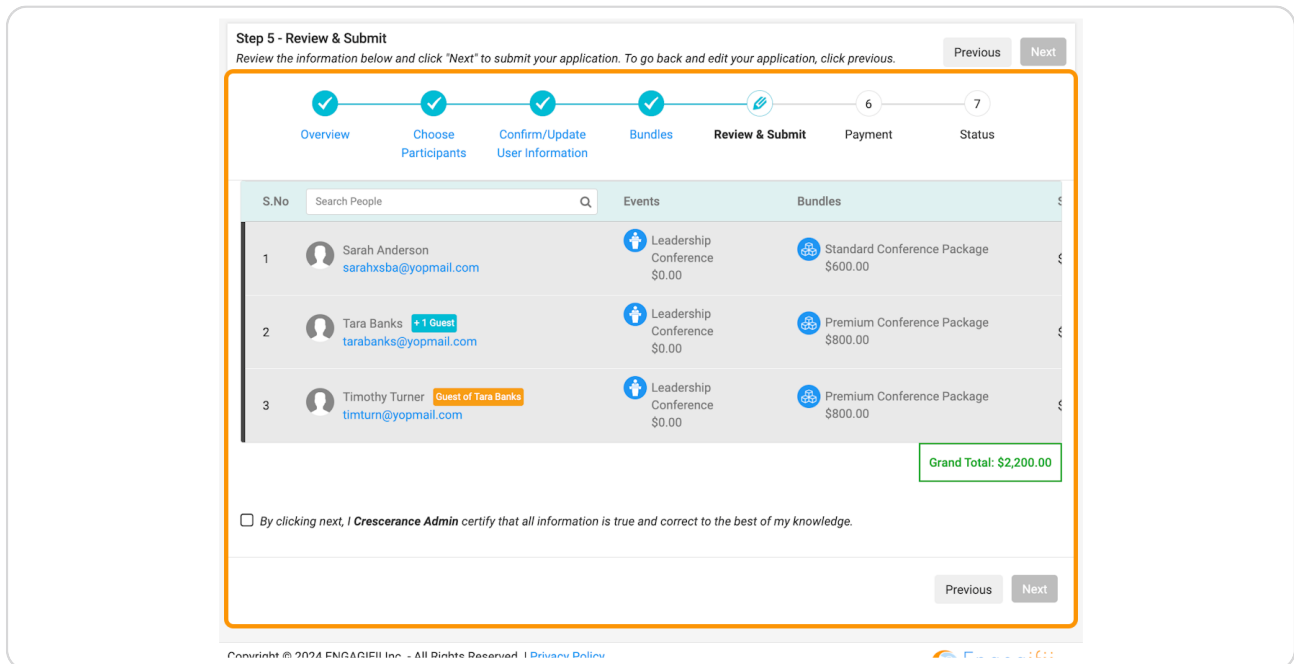


1 Item(s) \$800.00

Previous Next

STEP 21

Confirm bundles and options for each attendee and guest



Step 5 - Review & Submit
Review the information below and click "Next" to submit your application. To go back and edit your application, click previous.

Previous Next

Overview Choose Participants Confirm/Update User Information Bundles **Review & Submit** Payment Status

S.No	Search People	Events	Bundles
1	Sarah Anderson sarahxsba@yopmail.com	Leadership Conference \$0.00	Standard Conference Package \$600.00
2	Tara Banks +1 Guest tarabanks@yopmail.com	Leadership Conference \$0.00	Premium Conference Package \$800.00
3	Timothy Turner Guest of Tara Banks timtum@yopmail.com	Leadership Conference \$0.00	Premium Conference Package \$800.00

Grand Total: \$2,200.00

☐ By clicking next, I **Crescence Admin** certify that all information is true and correct to the best of my knowledge.

Previous Next

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STEP 22

Confirm

Additional Learning >

Settings and Configuration >

3

 Timothy Turner
timturn@yopm

☒ By clicking next, I **Crescerance**

STEP 23

Click on Next

wledge.

Previous

Next

 Engagifii
by CRESCERANCE

STEP 24

Search for your organization if billing to organization.

ected Bundles

int

MENT: Please select who should be billed for the registration and select payment timing.

d for this registration?*

now or later?*

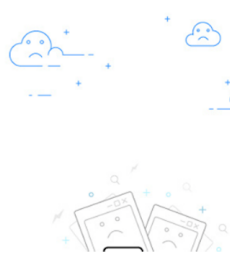
umber (Not mandatory)

Q cxba

People (0 Records) >

Organizations (0 Records) >

Start typing to search People or Organizations



STEP 25

Search your organization

int

MENT: Please select who should be billed for the registration and select payment timing.

d for this registration?*

now or later?*


umber (Not mandatory)

Q xsb

People (15 Records) >

Organizations (1 Record) >

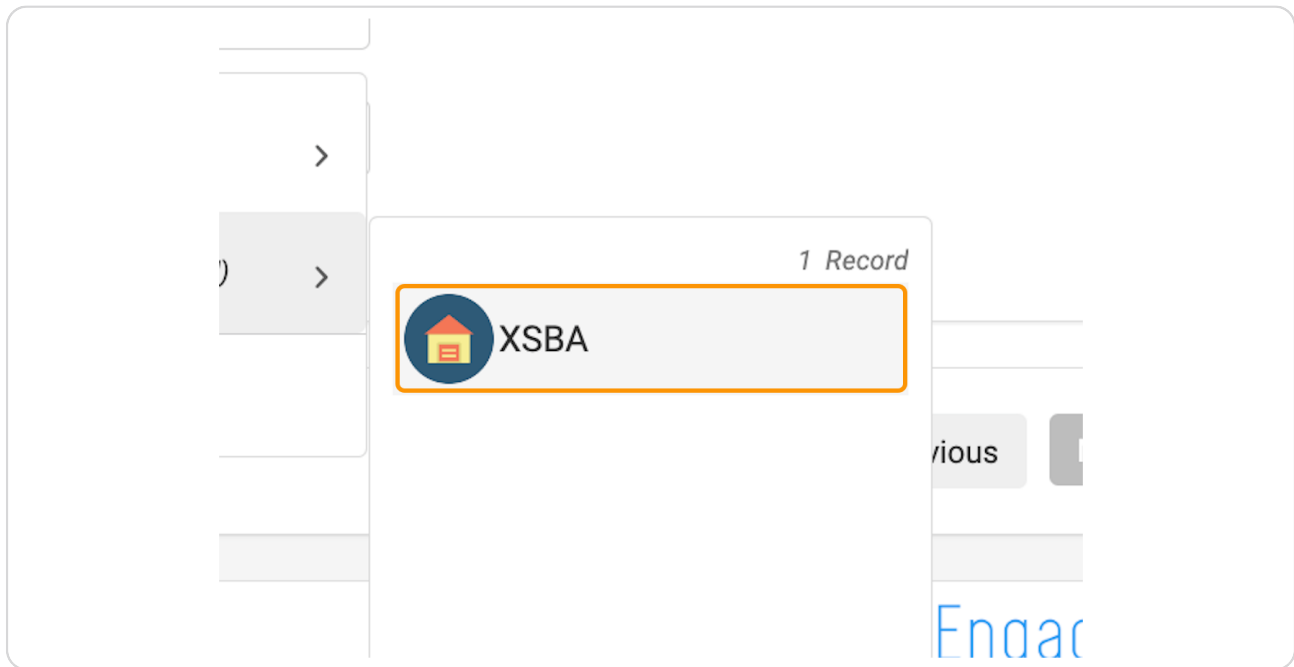
Start typing to search People or Organizations



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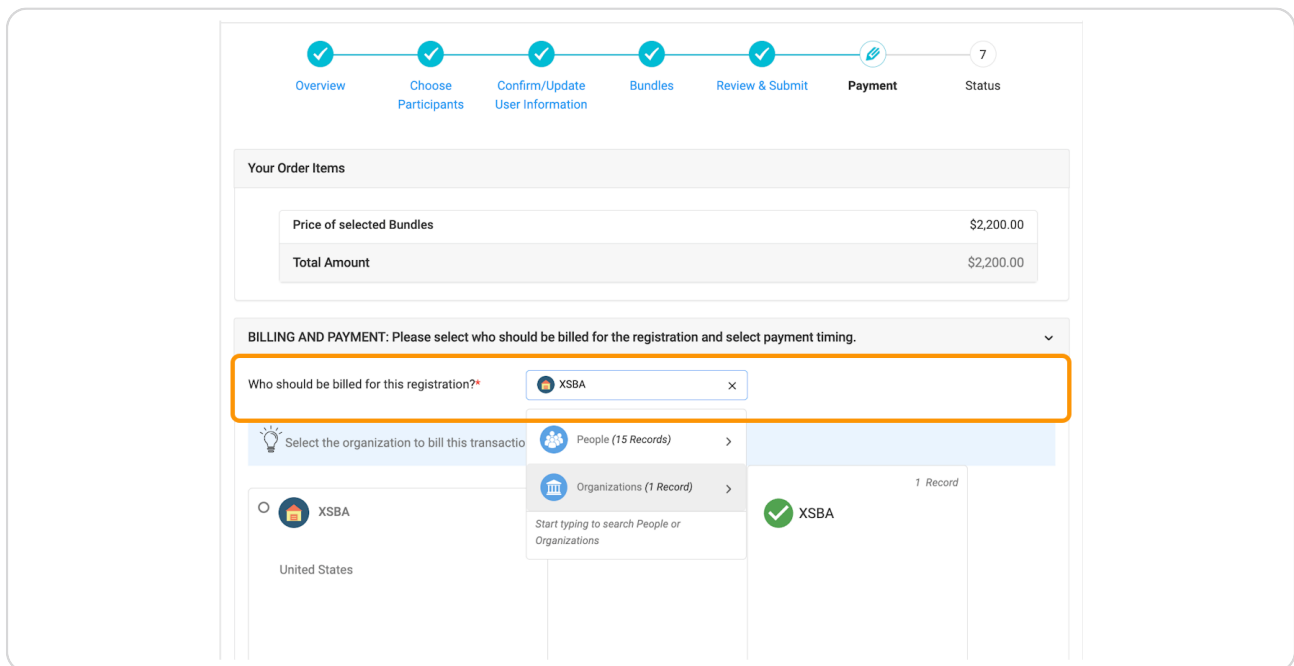
STEP 26

Click on organization



STEP 27

Click on Who should be billed for this registration?*...



STEP 28

Select Organization

My Area

Relationships

Communication

Library

Revenue

Legislation

Events

All Events

Event Speakers

Exhibitor

Venues

Rooms

Professional Learning

Settings and Configuration

Event type: Conference

Event Schedule: Day 1: Sat, Jul 20, 2024

Your Order Items

Price of selected Bundles

\$2,200.00

Total Amount

\$2,200.00

BILLING AND PAYMENT: Please select who should be billed for the registration and select payment timing.

Who should be billed for this registration?*

XSBA

Select the organization to bill this transaction.

XSBA

United States

Do you want to pay now or later?*

Bill them to Pay Later

Purchase order number (Not mandatory)

Send the invoice to buyer and the selected billing contacts:

STEP 29

Select Billing Contact

My Area

Relationships

Communication

Library

Revenue

Legislation

Events

All Events

Event Speakers

Exhibitor

Venues

Rooms

Professional Learning

Settings and Configuration

XSBA

United States

Do you want to pay now or later?*

Bill them to Pay Later

Purchase order number (Not mandatory)

Send the invoice to buyer and the selected billing contacts:

Also Copy me on the invoice email.

Add Billing Co


Name	Current Position	Current Department	Email	Phone
Alex Administrator-X...	Board Secretary		alexadminxsba@yopmail.com	

Previous

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STEP 30

Click on Next



My Area

Relationships

Communication

Library

Revenue

Legislation

Events

All Events

Event Speakers

Exhibitor

Venues

Rooms


Professional Learning

Settings and Configuration

Leadership Conference

Event Type: Conference

Event Schedule: Day 1: Sat, Jul 20, 2024



XSBA

United States

Do you want to pay now or later?


Bill them to Pay Later

Purchase order number (Not mandatory)

Send the invoice to buyer and the selected billing contacts:

☐ Also Copy me on the invoice email.


Add Billing Contact

Name	Current Position	Current Department	Email	Phone
<input checked="" type="checkbox"/>  Alex Administrator X...	Board Secretary		alexadminxsba@yopmail.com	

Previous

Next

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STEP 31

Voila!

Step 7 - Status

Close

Registration successful.

✓

Overview

✓

Choose Participants

✓

Confirm/Update User Information

✓

Bundles

✓

Review & Submit

✓

Payment

✓




Status

Summary

Invoice

Registrant Details

Thank you for registering!

Registrant	Registration ID	Registration Date	Registration Status
 Sarah Anderson sarahxsba@yopmail.com	RG-E-018902	Mon, Feb 19, 2024 at 11:56 AM	Registered
 Tara Banks <div>+ 1 Guest</div> tarabanks@yopmail.com	RG-E-018900	Mon, Feb 19, 2024 at 11:56 AM	Registered
 Timothy Turner <div>Guest of Tara Banks</div> tturn@yopmail.com	RG-E-018901	Mon, Feb 19, 2024 at 11:56 AM	Registered

