

Registration Modifications

23 Steps [View most recent version](#) 

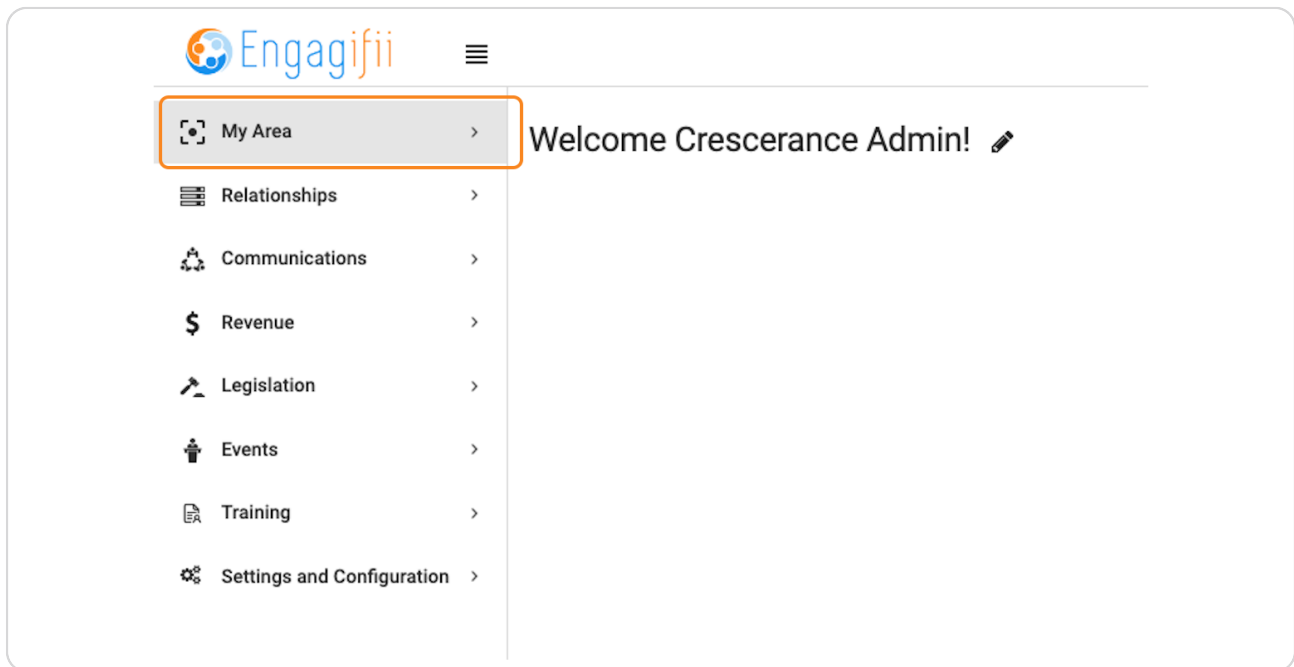
Created by
Engagifii Inc.

Creation Date
Sep 05, 2024

Last Updated
Sep 05, 2024

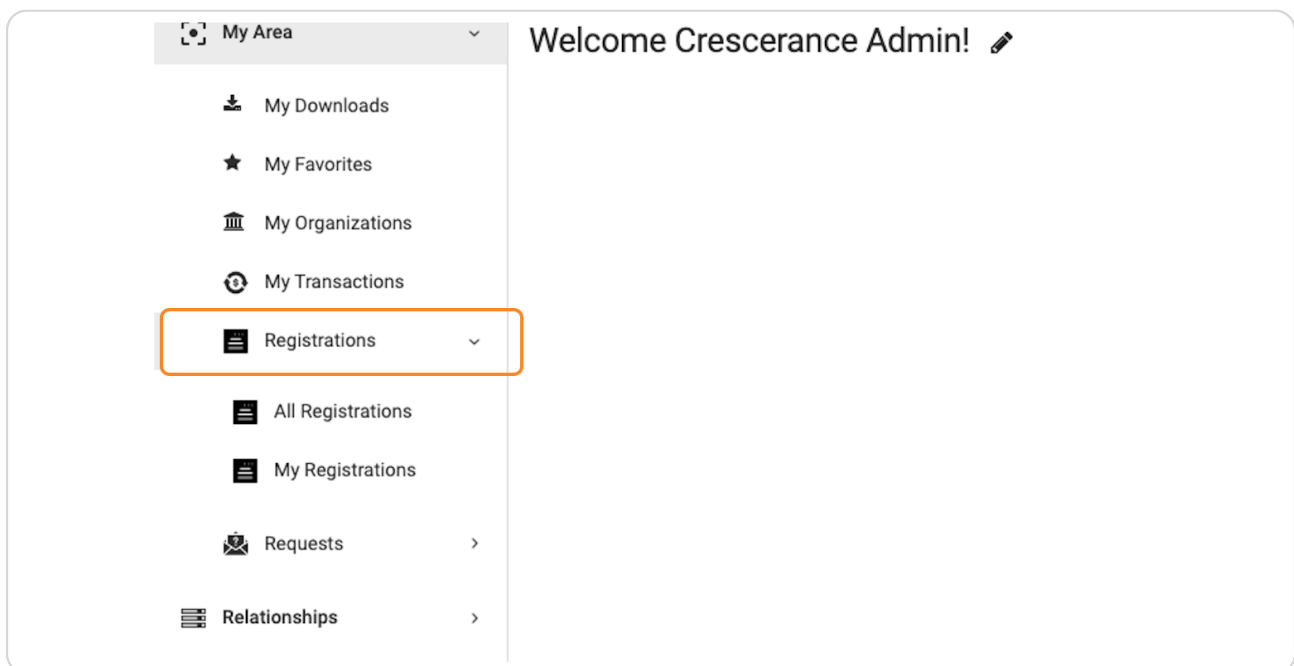
STEP 1

Click on My Area



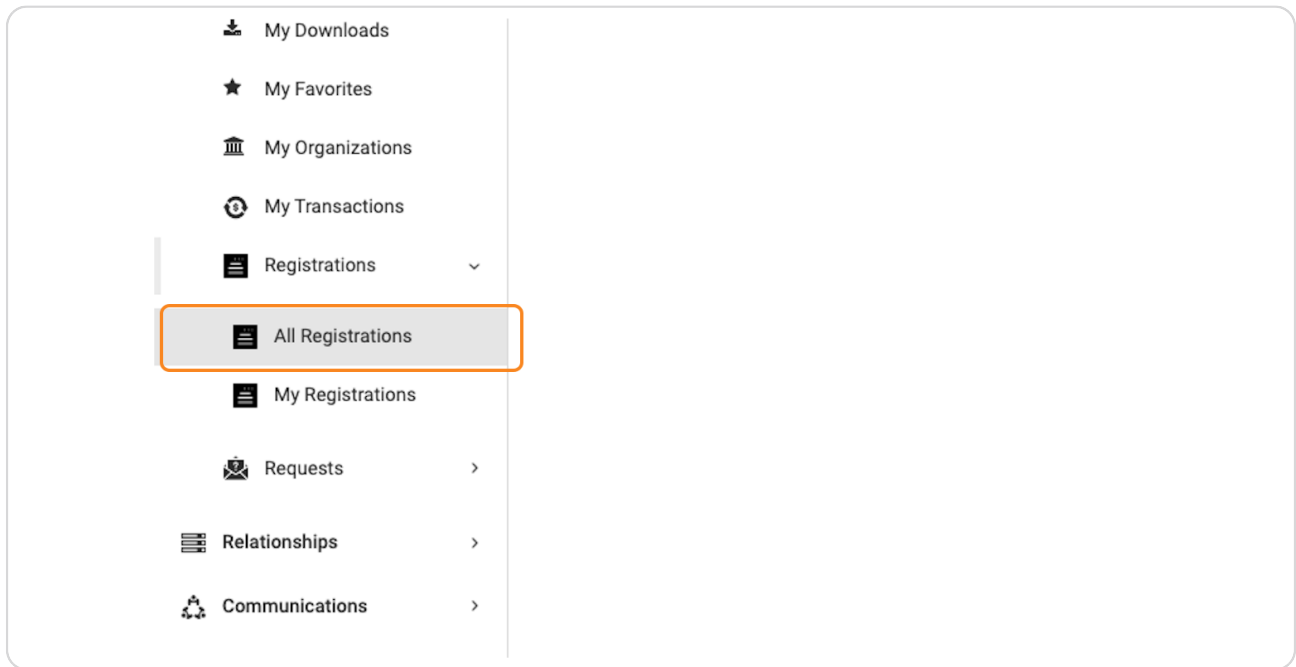
STEP 2

Click on Registrations



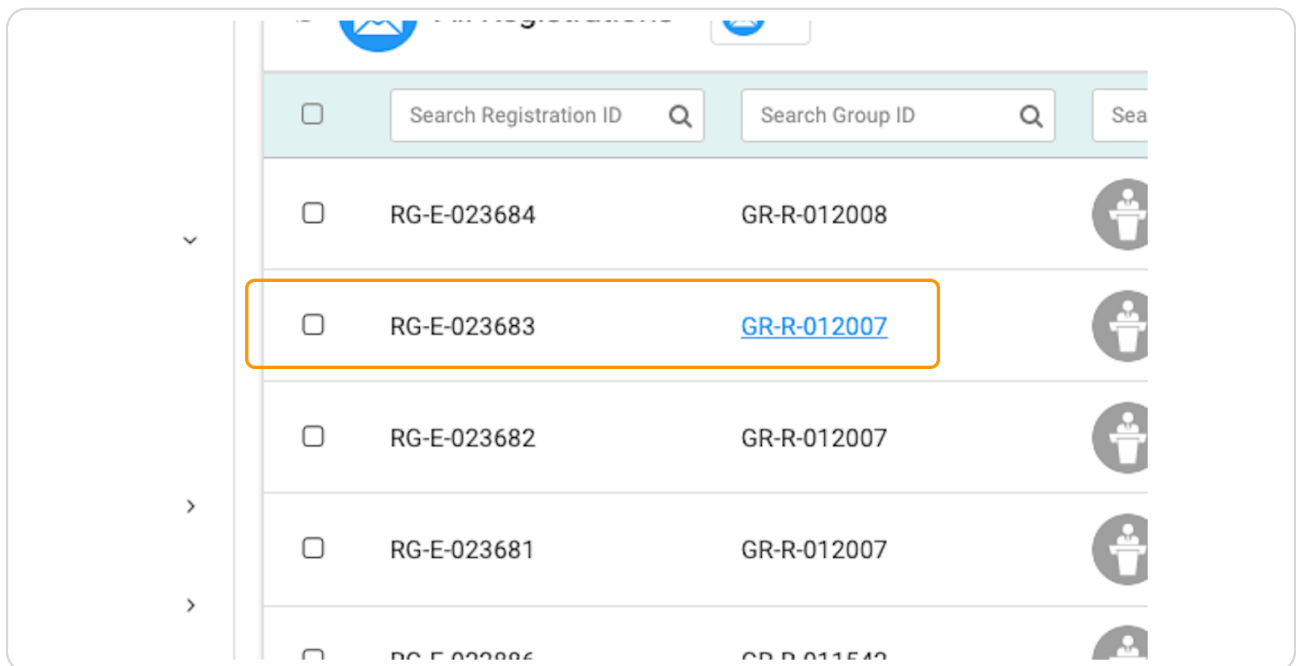
STEP 3

Click on All Registrations



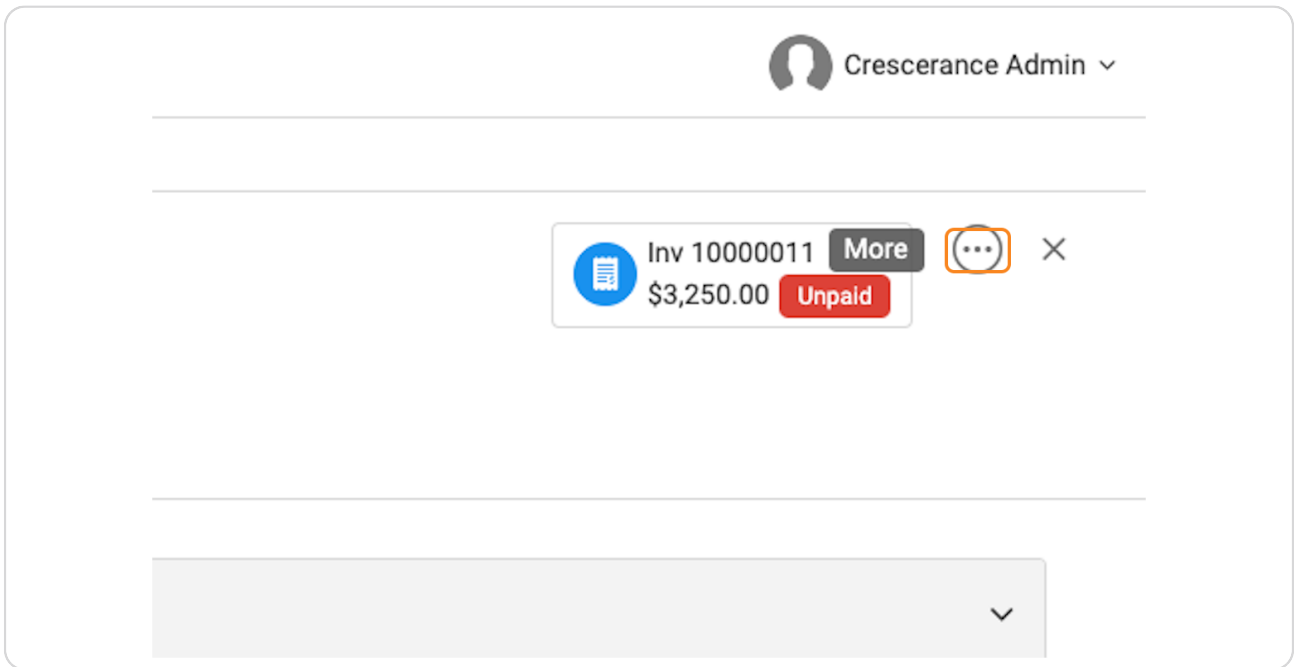
STEP 4

Select the Registration ID or Group ID for the registration you wish to modify



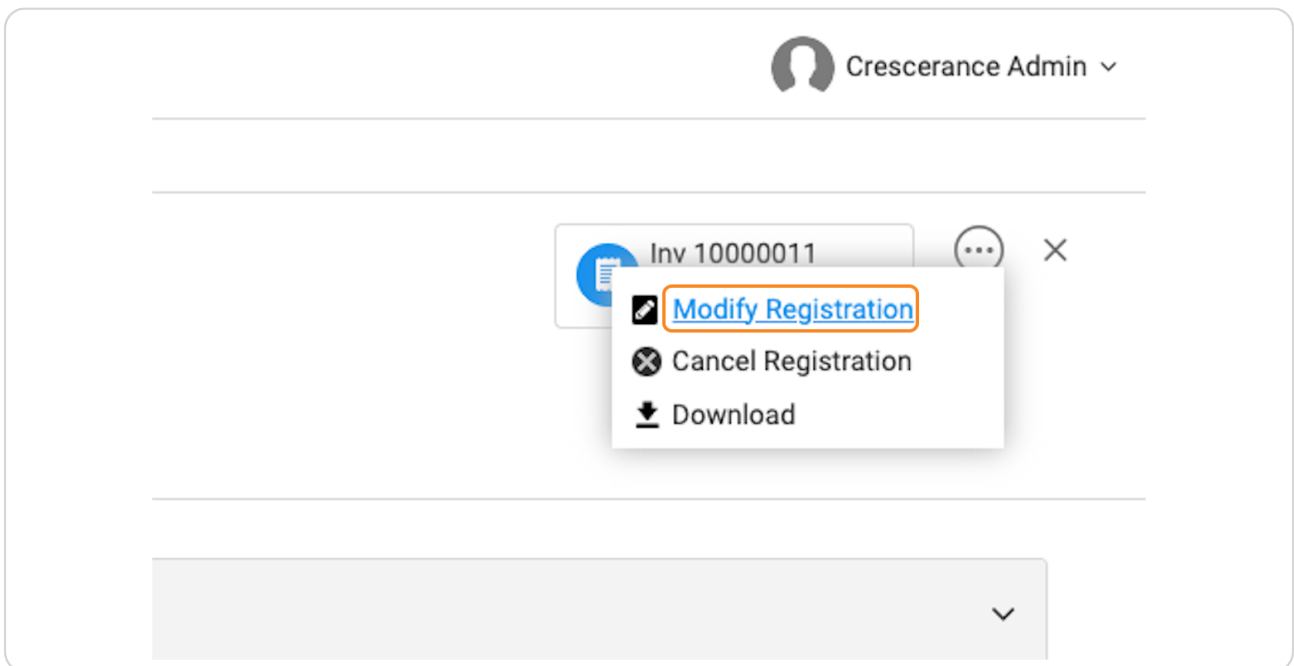
STEP 5

Click on 3 dots at the top right of the page



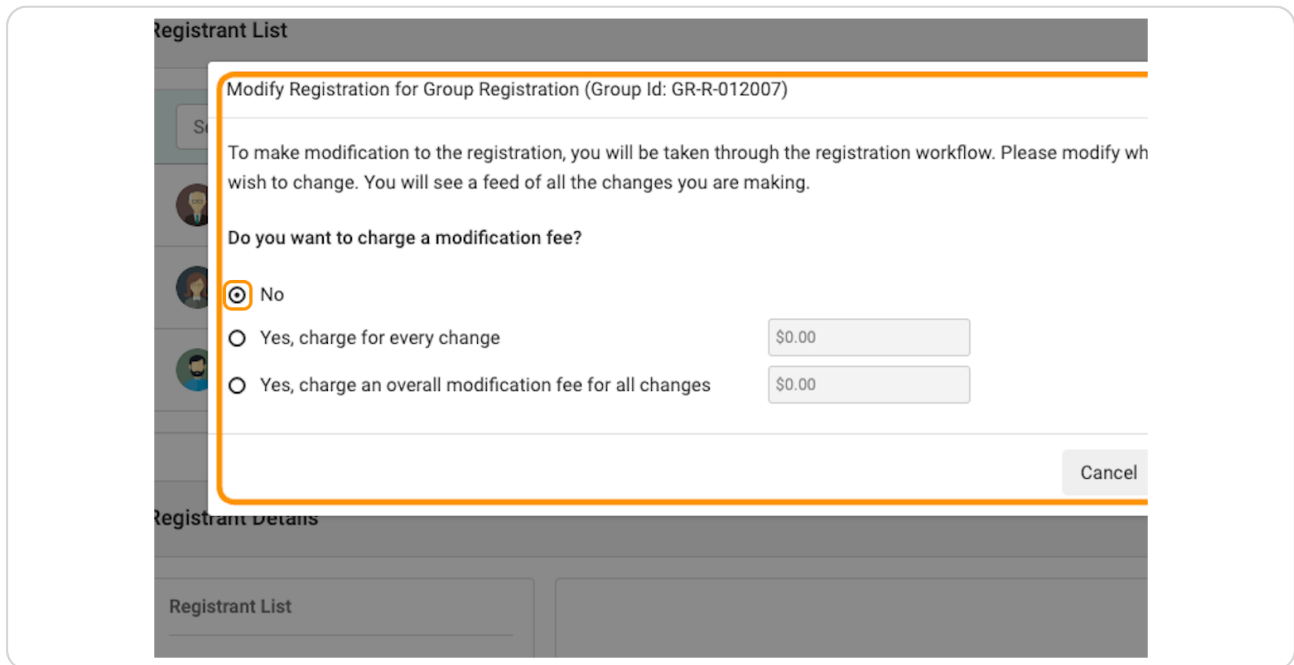
STEP 6

Click on Modify Registration



STEP 7

Select the correct circle for if a modification fee is charged



Registrant List

Modify Registration for Group Registration (Group Id: GR-R-012007)

To make modification to the registration, you will be taken through the registration workflow. Please modify what you wish to change. You will see a feed of all the changes you are making.

Do you want to charge a modification fee?

No

Yes, charge for every change

Yes, charge an overall modification fee for all changes

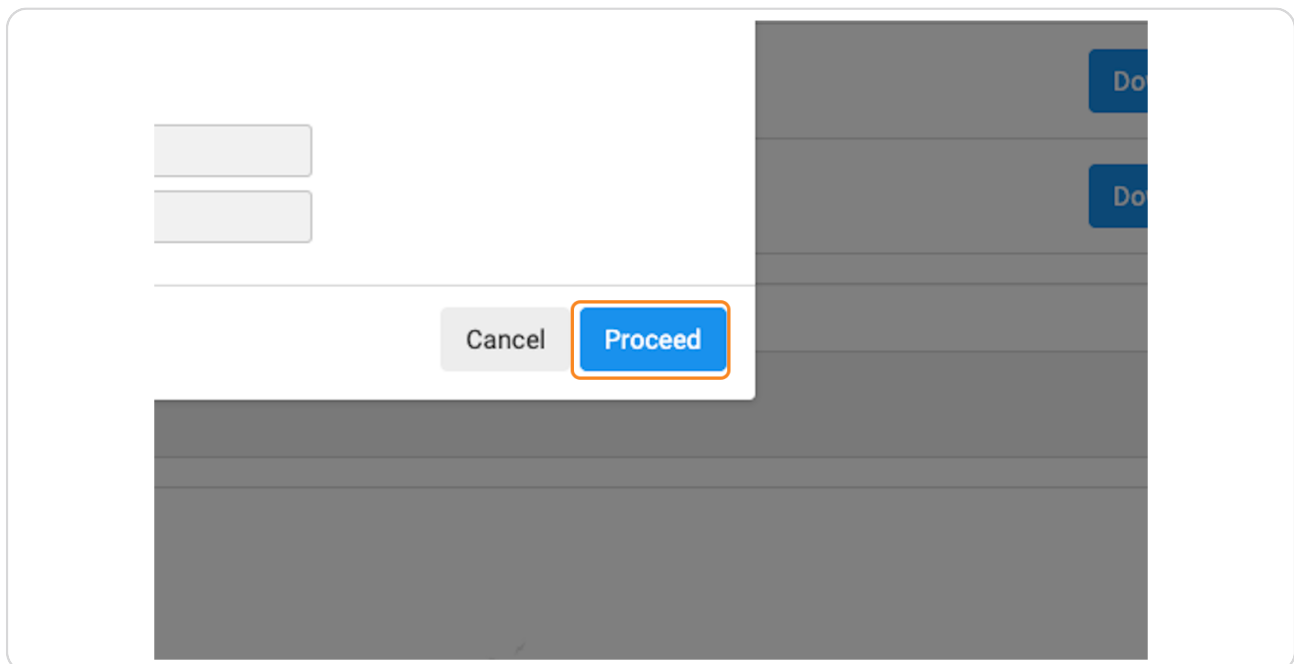
Cancel

Registrant Details

Registrant List

STEP 8

Click on Proceed



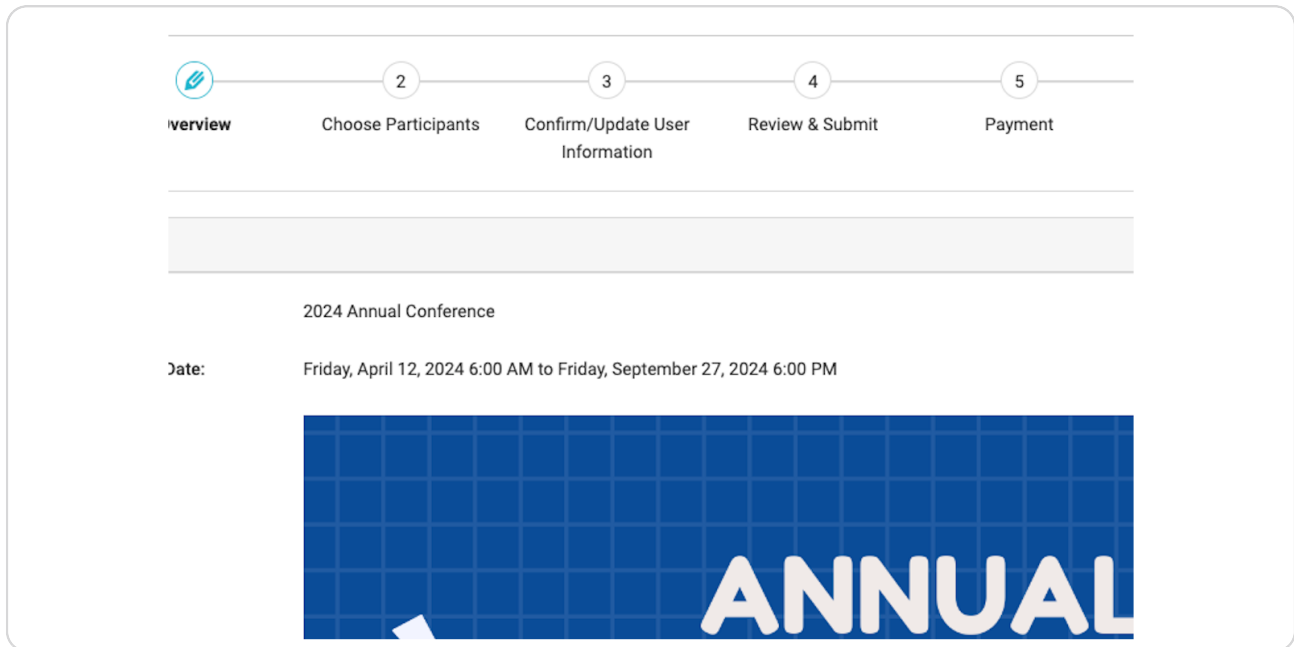
Do

Do

Cancel Proceed

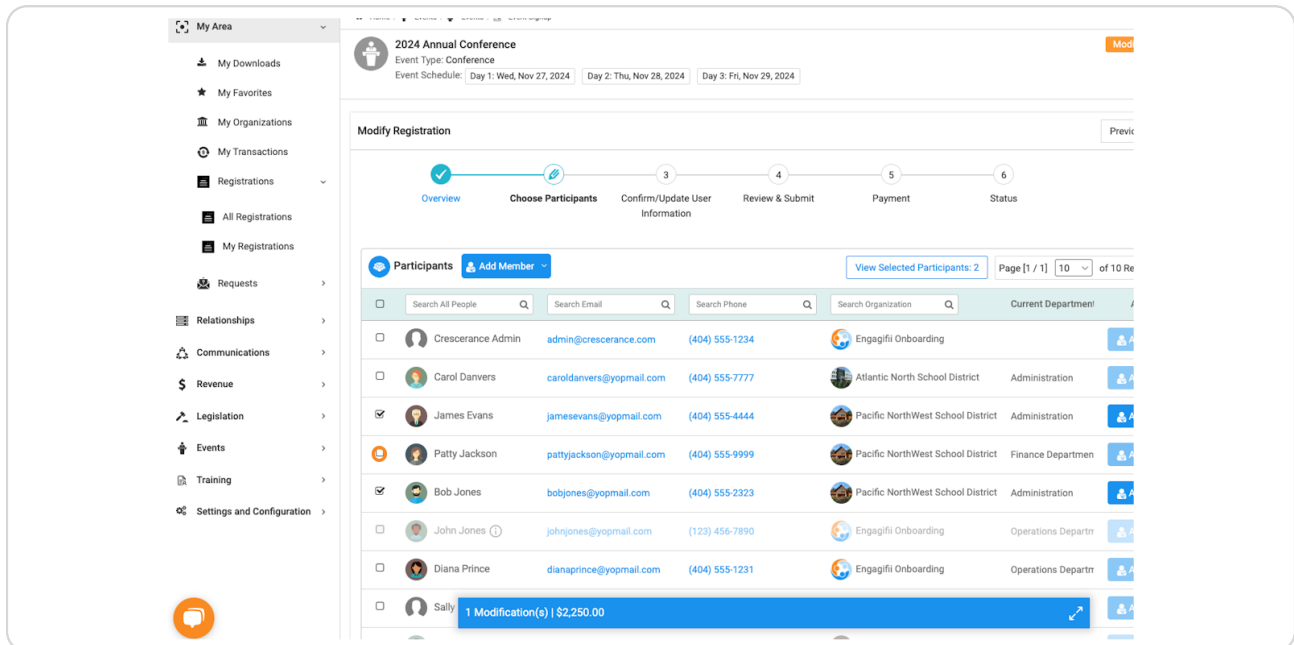
STEP 9

The event registration page opens up, click on next to modify the registration



STEP 10

Uncheck the participant(s) you wish to remove. Note the blue bar at the bottom keeping track of your modifications.



STEP 11

Check the participant(s) you wish to add

The screenshot shows the 'Modify Registration' page with a progress bar at the top. The 'Choose Participants' step is active. Below the progress bar, there is a 'Participants' section with an 'Add Member' button and a 'View Selected Participants: 3' button. A search bar with four filters (All People, Email, Phone, Organization) is present. A table lists participants with checkboxes, names, emails, phone numbers, and current departments. A blue notification bar at the bottom of the table reads '2 Modification(s) | \$3,250.00'.

<input type="checkbox"/>	Search All People	Search Email	Search Phone	Search Organization	Current Department
<input type="checkbox"/>	Crescerance Admin	admin@crescerance.com	(404) 555-1234	Engagifii Onboarding	
<input type="checkbox"/>	Carol Danvers	caroldanvers@yopmail.com	(404) 555-7777	Atlantic North School District	Administration
<input checked="" type="checkbox"/>	James Evans	jamesevans@yopmail.com	(404) 555-4444	Pacific NorthWest School District	Administration
<input type="checkbox"/>	Patty Jackson	pattyjackson@yopmail.com	(404) 555-9999	Pacific NorthWest School District	Finance Departmen
<input checked="" type="checkbox"/>	Bob Jones	bobjones@yopmail.com	(404) 555-2323	Pacific NorthWest School District	Administration
<input type="checkbox"/>	John Jones	johnjones@yopmail.com	(123) 456-7890	Engagifii Onboarding	Operations Departm
<input type="checkbox"/>	Diana Prince	dianaprince@yopmail.com	(404) 555-1231	Engagifii Onboarding	Operations Departm
<input checked="" type="checkbox"/>	Sally Ray	sallyray@yopmail.com	(404) 555-5555	Pacific NorthWest School District	Administration
<input type="checkbox"/>	Tony Romero	tonyromero@yopmail.com	(404) 555-2200	Atlantic North High School	Administration
<input type="checkbox"/>	Jane				

STEP 12

Click on Next when finished making changes

This is a close-up view of the participant list table. It shows the search filters and the first seven rows of the table. The 'View Selected Participants' button is visible in the top right corner.

<input type="checkbox"/>	Search All People	Search Email	Search Phone	Search Organization	Current Department
<input type="checkbox"/>	Crescerance Admin	admin@crescerance.com	(404) 555-1234	Engagifii Onboarding	
<input type="checkbox"/>	Carol Danvers	caroldanvers@yopmail.com	(404) 555-7777	Atlantic North School D	
<input type="checkbox"/>	James Evans	jamesevans@yopmail.com	(404) 555-4444	Pacific NorthWest Sch	
<input type="checkbox"/>	Patty Jackson	pattyjackson@yopmail.com	(404) 555-9999	Pacific NorthWest Sch	
<input type="checkbox"/>	Bob Jones	bobjones@yopmail.com	(404) 555-2323	Pacific NorthWest Sch	
<input type="checkbox"/>	John Jones	johnjones@yopmail.com	(123) 456-7890	Engagifii Onboarding	

STEP 13

Click on Next to verify user information

Engagifii 2024 Annual Conference
Event Type: Conference
Event Schedule: Day 1: Wed, Nov 27, 2024 | Day 2: Thu, Nov 28, 2024 | Day 3: Fri, Nov 29, 2024

Modify Registration

Progress: Overview (✓) | Choose Participants (✓) | **Confirm/Update User Information** (✎) | Review & Submit (4) | Payment (5) | Status (6)

Bob Jones | James Evans | Sally Ray

Bob Jones

Basic Information [Edit]

Contact Details

Organization * [Term History]

Pacific NorthWest School District
Department: Administration
Position: District Coordinator **Corner**

Email Address **Primary** bobjones@yopmail.com unsubscribe
Phone Number **Primary** (404) 555-2323

Address 2 Modification(s) | \$3,250.00

STEP 14

Verify in the new window the changes you have made, green for additions, red for removals

Modify Registration

Progress: Overview (✓) | Choose Participants (✓) | Confirm/Update User Information (✓) | **Review & Submit** (✎) | Payment (5) | Status (6)

Review the information below and click "Next" button to submit your application. To go back and edit your application, click previous.

S.No	Search People	Events	Sub-total
1	Bob Jones bobjones@yopmail.com	2024 Annual Conference \$1,250.00	\$1,250.00
2	James Evans jamesevans@yopmail.com	2024 Annual Conference \$1,000.00	\$1,000.00
3	Sally Ray Added sallyray@yopmail.com	2024 Annual Conference \$1,000.00	\$1,000.00
4	Patty Jackson Removed pattyjackson@yopmail.com	2024 Annual Conference \$1,000.00	\$1,000.00
No modification charge is applicable			\$0.00
			Grand Total: \$3,250.00

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

Previous Next

STEP 15

Click on the acknowledgement and then click Next

Engagifii

Home / Events / Event Signup

2024 Annual Conference
Event Type: Conference
Event Schedule: Day 1: Wed, Nov 27, 2024 | Day 2: Thu, Nov 28, 2024 | Day 3: Fri, Nov 29, 2024

Modify Registration

Previous Next

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

Review the information below and click "Next" button to submit your application. To go back and edit your application, click previous.

S.No	Search People	Events	Sub-total
1	Bob Jones bobjones@yopmail.com	2024 Annual Conference \$1,250.00	\$1,250.00
2	James Evans jamesevans@yopmail.com	2024 Annual Conference \$1,000.00	\$1,000.00
3	Sally Ray Added sallyray@yopmail.com	2024 Annual Conference \$1,000.00	\$1,000.00
4	Patty-Jackson Cancelled pattyjackson@yopmail.com	2024 Annual Conference \$1,000.00	\$1,000.00
No modification charge is applicable			\$0.00
			Grand Total: \$3,250.00

I, Crescance Admin certify that all information is true and correct to the best of my knowledge.

Previous Next

STEP 16

New screen shows the changes for the new registration details

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

ORDER ITEMS: Here are the updated registration details for the registrants.

S.No	Search People	Events	Sub-total
1	Bob Jones bobjones@yopmail.com	2024 Annual Conference \$1,250.00	\$1,250.00
2	James Evans jamesevans@yopmail.com	2024 Annual Conference \$1,000.00	\$1,000.00
3	Sally Ray Added sallyray@yopmail.com	2024 Annual Conference \$1,000.00	\$1,000.00
No modification charge is applicable			\$0.00
			Grand Total: \$3,250.00

NOTIFICATIONS: Who will be notified about this set of registration modifications?

Who will be notified?

- Modified registrants: 3 Registrants | [Preview Notification Email](#)
- Cancelled registrants: Patty-Jackson (pattyjackson@yopmail.com) | [Preview Notification Email](#)
- Requested by: Crescance Admin | [Preview Notification Email](#)
- Notify me: Crescance Admin | [Preview Notification Email](#)

STEP 17

Scroll down to select who will be notified of these changes or add additional notification people

The screenshot shows a registration management interface. On the left is a sidebar with navigation options: My Area, My Downloads, My Favorites, My Organizations, My Transactions, Registrations, All Registrations, My Registrations, Requests, Relationships, Communications, Revenue, Legislation, Events, Training, and Settings and Configuration. The main content area displays event details for a '2024 Annual Conference' with a schedule from Nov 27 to Nov 29, 2024. A table lists two registrants: James Evans and Sally Ray, both with a registration fee of \$1,000.00. A 'Grand Total' of \$3,250 is shown. Below the table, a 'NOTIFICATIONS' section is highlighted with an orange box. It asks 'Who will be notified about this set of registration modifications?' and lists several notification options, all of which are checked: Modified registrants (3 Registrants), Cancelled registrants (Patty Jackson), Requested by (Crescencere Admin), Notify me (Crescencere Admin), Event Contact(s) (John Jones), Billing Contact(s), and Finance Contact(s). Below this is a 'Notify Additional People' section with a table for adding new contacts. At the bottom, a 'BILLING AND PAYMENT' section is partially visible, asking 'Who should be billed for this registration?'.




STEP 18

Type in Billing Organization and select from dropdown

The screenshot shows the 'BILLING AND PAYMENT' section of the registration management interface, highlighted with an orange box. It contains the following elements: a search bar for 'Who should be billed for this registration?' with the text 'pacif' entered; a dropdown menu for 'Do you want to pay now or later?'; a dropdown menu for 'Purchase order number (Not mandatory)'; a search bar for 'Notify Additional People' with a dropdown menu showing 'People (0 Records)' and 'Organizations (2 Records)'; and a 'DETAILED FINANCIAL IMPACT' section with a list of actions: a new invoice for \$3,250.00, a credit note for \$3,250.00, and status changes for the original invoice and credit note. At the bottom right, there are 'Previous' and 'Next' buttons.




STEP 19

Select the organization

Requests >	Who should be billed for this registration?*
Relationships >	 Select the organization to bill this transaction
Communications >	
Revenue >	  PACIFIC NORTHWEST SCHOOL DISTRICT
Registration >	275 Riverside Parkway Austell, GA 30168 United States
Notes >	

STEP 20


Select Bill them to Pay Later or Bill Now

  PACIFIC NORTHWEST SCHOOL DISTRICT	
275 Riverside Parkway Austell, GA 30168 United States	
Not the correct address? Change	
Do you want to pay now or later?*	<input type="text" value="Bill them to Pay Later"/>
Purchase order number (Not mandatory)	<input type="text"/>
 Send the invoice to buyer and the selected billing contacts:	
<input type="checkbox"/> Also Copy me on the invoice email.	

STEP 21


Review Detailed Financial Impact

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"/>  Patty Jackson	Board Member	Finance Department	pattyjackson@yopmail.com	(404) 555-9999

DETAILED FINANCIAL IMPACT: Here is specifically what will happen as a result of this modification.

What will happen when this registration is modified?


- A new invoice for \$3,250.00 will be generated in an **Paid** state.
- A Credit Note for \$3,250.00 against the original invoice (Inv 10000011) will be generated to offset the invoice due balance.
- Status of the original invoice (Inv 10000011) will change to **Paid** with a due balance of \$0.00.
- Status of the credit note will change to **Used** with a balance of \$0.00.

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STEP 22

Click on Next



STEP 23

And view updated registration modification details

Step 6 - Status Close

Registration successful.

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

Summary Invoice

Registrant Details ▼

Registration modified successfully.

Registrant	Registration ID	Registration Date	Modification Date	Registration Status
James Evans jamesevans@yopmail.com	RG-E-023683	Thu, Sep 05, 2024 at 3:16 PM	Thu, Sep 05, 2024 at 3:42 PM	Registered
Patty Jackson pattyjackson@yopmail.com	RG-E-023682	Thu, Sep 05, 2024 at 3:16 PM	Thu, Sep 05, 2024 at 3:42 PM	Cancelled
Bob Jones bobjones@yopmail.com	RG-E-023681	Thu, Sep 05, 2024 at 3:16 PM	Thu, Sep 05, 2024 at 3:42 PM	Registered
Sally Ray sallyray@yopmail.com	RG-E-023685	Thu, Sep 05, 2024 at 3:42 PM	Thu, Sep 05, 2024 at 3:42 PM	Registered

