

LOGOS

Powering Your Ministry

Event Registration with Wufoo

PRODUCT RELEASE DOCUMENT

Document Version:

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RELEASE OVERVIEW

This release is another major improvement to Logos Ministry Connection, adding web-based event registration functionality that is increasingly in-demand.

The Ministry Connection solution consists of two sites:

- **Dashboard** (www.logosdashboard.com) – The Back Office System for Church / Parish Staff. This includes the “Ministry Connection” module for management of the Logos Connect site.
- **Logos Connect** (www.Logos Connect.com) – The engagement portal for attendees, congregants, members, and parishioners. This system contains family management, online giving, **and now event registration as well.**

To provide this web-based event registration functionality, Logos has integrated with an expert in online form creation, Wufoo.com. This integration allows us to provide you with an established, easy to use form creation system as the backbone of our event registration process. Wufoo’s intuitive interface, accessible backend database, and competitive pricing structure make it the perfect solution to join the rest of the Logos Ministry Connection functionality.

With this integration, creation and management of your forms will take place within the Wufoo.com environment. You’ll need to create an account with Wufoo, and export your registration info out of the Wufoo site and import it into your Logos II program.

Once you have your Wufoo account created, you will need to create at least one form before the connection to your Logos Ministry Connection account can be established. Wufoo does not generate the API key until at least one form is created. See the [Basic Wufoo Form Creation](#) section below for directions on creating a form and finding your API key. Once you have your API key, please contact Logos Support at support@logoscms.com to setup the connection between your Logos Ministry Connection account and your Wufoo account.

For the members of your organization, the registration forms will be embedded directly in your Logos Connect website, providing a seamless interface that includes family management, online giving, and event registration. No separate login is required for a user to register.



You may access all of this documentation & helpful training videos at the following URL:

<http://www.logoscms.com/event-registration>

RELEASE DOCUMENT OUTLINE

This document contains a plethora of resources about this release to help position it for success at your church / parish. Below is an outline of all the resources contained in this Release Documentation:

- **[Basic Wufoo Form Creation](#)** – A brief overview on how to create Wufoo forms, plus information on how to publish your forms, turn on/off guest registrations, and accept payments.

- [Form Requirements](#) – Details on the fields that are required in your Wufoo forms and in your import file.
- [Export Data From Wufoo](#) – Steps to create an export of your registration data for import into Logos II.
- [Import Into Logos II](#) – How to import the registration data into your Logos II program.

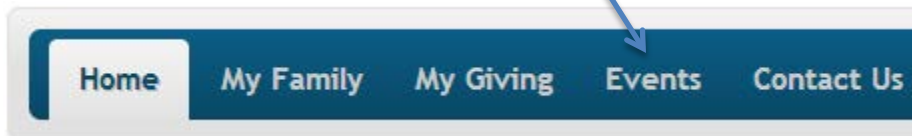
DASHBOARD UPDATES

The Ministry Connection module now allows you to turn guest registrations on or off.

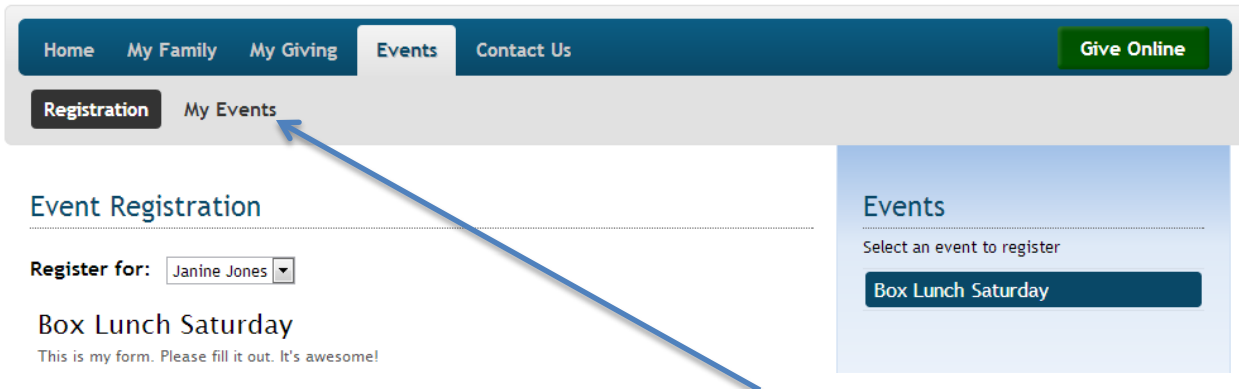
LOGOS CONNECT UPDATES

Logos Connect has most of the new functionality associated with this release.

- **Events Tab** – This new tab is the home for the new Event Registration functionality. Once enabled, this tab will display on your Logos Connect login page (if guest registration is enabled) and on the Home page after users login.



- **Registration** – After selecting the Events tab, users can then click on the **Registration** menu option to view the available events and submit their registrations.



- **My Events** – Users also have the option to click on the **My Events** menu option to view the details of any previous events they've registered for.
- **Register For** – When enabled (see [below](#)), this combo box will allow your users to register family members. For example, parents can use this feature to register their children for youth events.
- **Form Errors** – When logged in with an admin account, the Events area will notify you if there are any problems with the setup of your event forms. If your form doesn't match the rules in the [Form Requirements](#) section of this document, the form will not display for your users, and you will see a **Form Errors Detected** message. Click on the error message to display details about the errors. Correct the problems in Wufoo, then click the **Refresh Forms** button in the **Events** list to verify all errors are resolved. If no errors are found, the name of the form will display instead of the error message.



CUSTOMER SUPPORT

- You may access all of this documentation & videos at the following URL:
<http://www.logoscms.com/event-registration>
- Email Support at support@logoscms.com.
- Call Support at **877.99-LOGOS (877.995.6467)**, available Monday-Friday, 6am - 5pm PDT
- Login to the Client Support portal: <http://logoscms.com/client-portal>.

BASIC WUFOO FORM CREATION

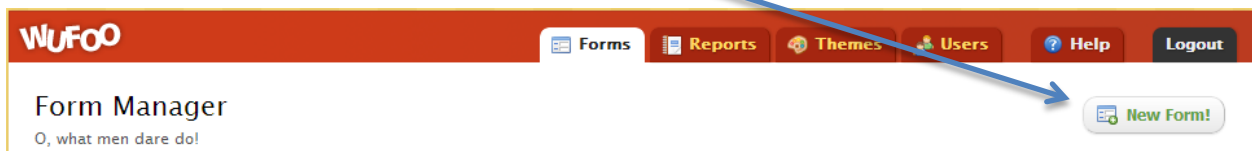
The information below provides basic steps for creating a form in Wufoo. Please see the following section, [Form Requirements](#), for details on the required fields you will need to add to every form.



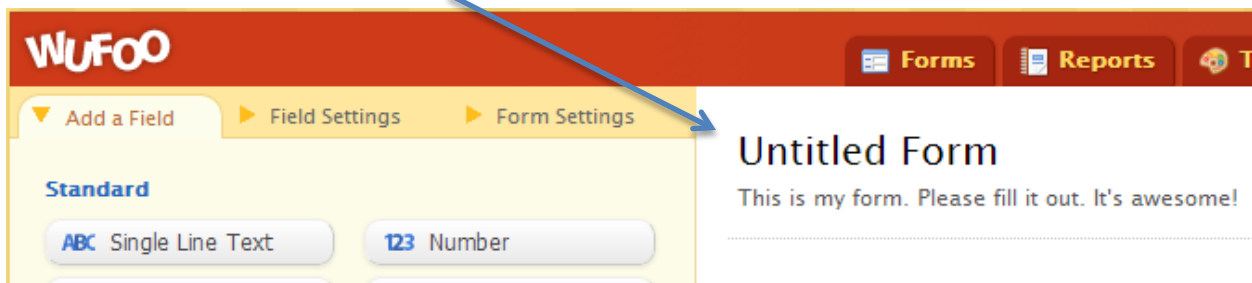
Additional form settings and field options are available, beyond what is described in this document. Please see Wufoo's [online help documentation](#) for additional details on creating forms.

FORM CREATION

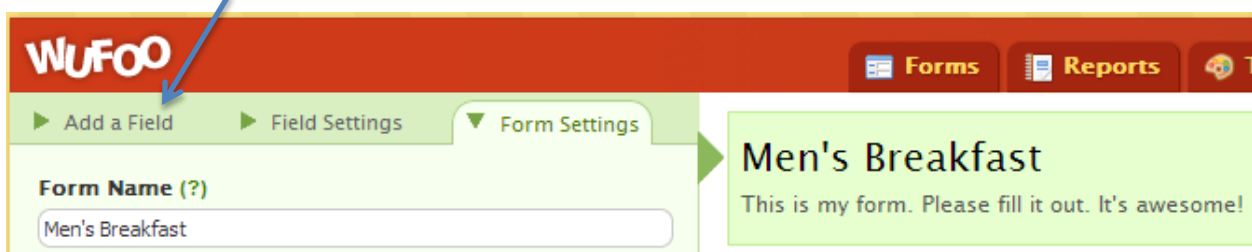
1. When logged into **Wufoo > Forms**, click the **New Form** button.




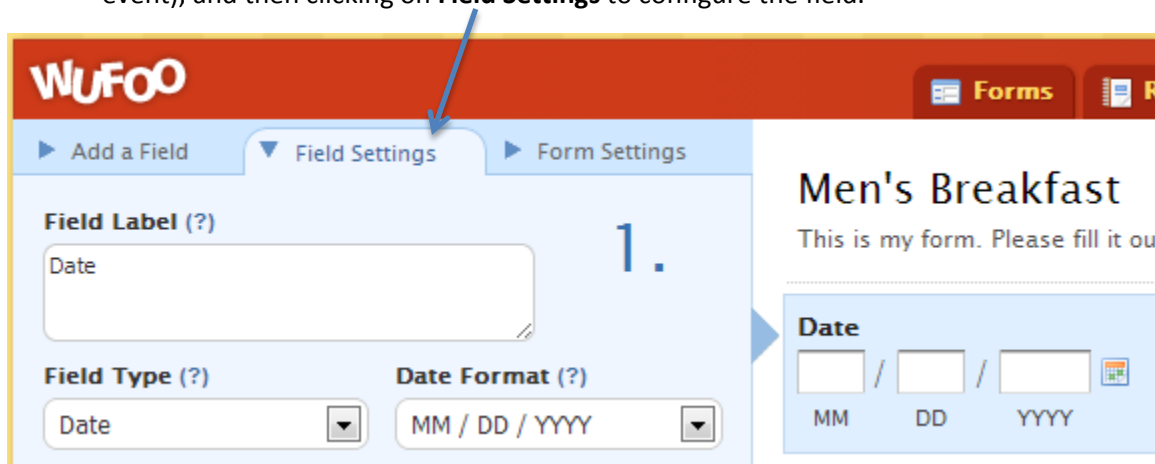
2. Click on the **Untitled Form** section to name this form. This name will appear in your **Logos Connect** site and will be used by your registrants to identify the event.




3. Click **Add a Field** to view the list of field types that can be added to your form.



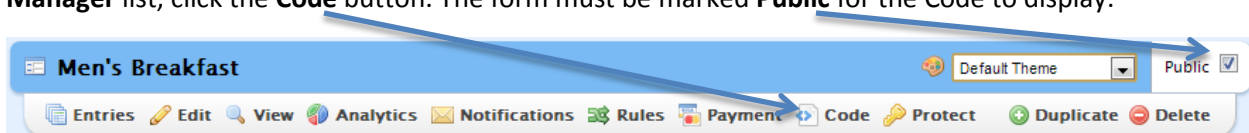
- Following the information in the [Form Requirements](#) section below, add the required fields to your form by clicking on the field type you need (such as **Date**  for the date of the event), and then clicking on **Field Settings** to configure the field.

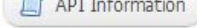


- If you have defined multiple fees for an event in Logos II, you should define a separate field for each fee in your form.
- When you've finished adding all the required fields, add any optional fields you need to gather any additional info you need from your event participants.
- Click the **Save Form**  button to save your form.

RETRIEVE WUFOO API KEY

Once you've created your first form, you can now access the Wufoo API key that is needed to establish the link between your Wufoo account and your Logos Ministry Connection account. In the **Form Manager** list, click the **Code** button. The form must be marked **Public** for the Code to display.



In the **Form Code Manager** screen that displays, click the **API Information** button  at the top right. Your **API Key** will display. Copy and paste that key into an email to support@logoscms.com, along with the subdomain (i.e. the name you gave your Wufoo account user name).

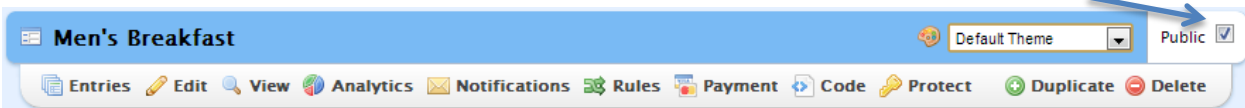


If you change your API Key or Wufoo subdomain, Ministry Connection will need to be updated also.

ADDITIONAL CONFIGURATION STEPS

How do I turn my form on/off?

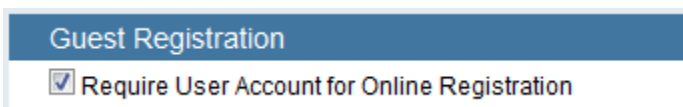
After saving your form, it will display in the **Form Manager** list. You may uncheck the **Public** box



to prevent the form from being published to your Logos Connect site, if you're not yet ready to accept registrations. Any forms that are marked as Public will display on your Logos Connect site.

How do I turn on/off guest registrations for my forms?

Log in to www.logosdashboard.com. Go the **Ministry Connection** module, and uncheck the box next to **Require User Account for Online Registration**.



How do I allow individuals to register for other family members?

- Add a field to your form called **creatorid**. In the wufoo **Field Settings** area for that field, enter **hide** (case sensitive) in the **Add CSS Layout Keywords** field. This will hide this field from the form when viewed by your registrants.

Add CSS Layout Keywords (?)



For more details: <http://www.wufoo.com/2013/06/19/hidden-fields-forms/>

- When users open a registration form, a **Register For:** field will display, allowing them to select another family member. When selected, that individual's name will automatically populate the name fields on your form.

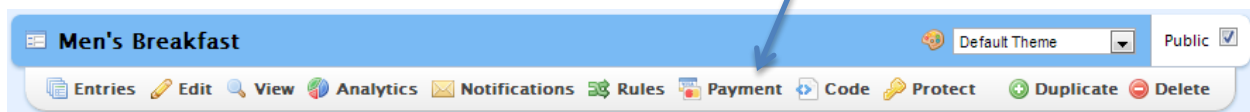
How do I accept payments for my registrations?

At this time Wufoo is not integrated with Logos' recommended payment processor, BluePay. However, Wufoo does work with a wide variety of payment processors. This allows you to accept payments as part of the registration process, and to include the payment information in the exported data file that you will import into Logos II. You will need to setup an account with one of Wufoo's accepted processors.



For additional details regarding payments, see Wufoo's [online help documentation](#).

1. In the **Form Manager**, find your form and click on the **Payment** button.




2. In the **Merchant Setup** area, select the processor you're using to accept payments, and define your account information with that processor.

 A screenshot of the 'Merchant Setup' form. It features a heading '1. Merchant Setup →' and a dropdown menu labeled 'Select a Merchant (?)' with 'Stripe' selected. Below this is a section titled 'Authenticate your Stripe Username and Password' containing a button labeled 'S Connect with Stripe'. At the bottom, it says '(Opens in a New Window)'.

3. Select your currency type in the **Payment Options** area.
4. In the **Assign Prices** area, set the **Base Price** to the fee amount defined in Logos II.

 A screenshot of the 'Fixed Amount' form. It has a heading 'Fixed Amount (?)' and a text input field labeled 'Base Price' with the value '\$ 25.00' entered.

- a. If you have defined more than one fee for an event in Logos II, leave the **Base Price** field set to \$0.00 and use the **Assign Prices to a Field** section below to define the amount for each fee. Each fee defined in Logos II should have their own fee defined in that event's Wufoo form as well.
5. Click the **Save Settings**  button to save your payment definitions.

FORM REQUIREMENTS

OVERVIEW

The fields below are required for your Wufoo registrations to be imported into Logos II, and should be added to your Wufoo forms. The field titles in the import file must exactly match the **Field Names** listed in the tables below for the Logos II import routine to automatically match the correct fields. Therefore, we recommend that when you create these fields on your forms, you name them as listed here. If a field title does not match, you can manually match the field from the form to the correct Logos II Event Registration field.

All event information (name, date, fees, etc.) in the export file must match the definitions in Logos II, or the registration will not be imported.

HIDDEN FIELDS

Some information (**Event Name, Event Date**, etc.) is required by the Logos II import routine but should not be presented on the form for your registrant's to make an entry. You can manually add these to your Wufoo export file before importing it into Logos II. Or, to have these fields populate in Wufoo automatically, add them to your form, then for each field:

- In the Wufoo **Field Settings** area, enter the value you need in the import file in the **Predefined Value/Date** field. This will populate that field with the information required by the Logos II Import routine.



For more details: http://help.wufoo.com/articles/en_US/SurveyMonkeyArticleType/Field-Settings

- In the wufoo **Field Settings** area, enter **hide** in the **Add CSS Layout Keywords** field. This will hide this field from the form as presented to your registrants.



For more details: <http://www.wufoo.com/2013/06/19/hidden-fields-forms/>

REGISTRANT'S MEMBER INFO

If a registrant is logged into Logos Ministry Connection, their Logos II Member ID and their Name will automatically be populated into the form, if you have correctly defined those fields in the form. When you create your export from Wufoo, you will need to include these fields.

REQUIRED FIELDS

Field Name	Description	Notes
Member ID	Registrant's LII Member ID	<ul style="list-style-type: none"> Use wufoo hide command. Automatically populated for logged in registrants. Leave blank in import file for guest registrations.
First Name	Registrant's First Name	<ul style="list-style-type: none"> Visible in form. Automatically populated for logged in registrants. If guest registration is enabled, registrant must make an entry.
Last Name	Registrant's Last Name	<ul style="list-style-type: none"> Visible in form. Automatically populated for logged in registrants. If guest registration is enabled, registrant must make an entry.
Event Name	Name of the Event	<ul style="list-style-type: none"> Use wufoo hide command. Enter event name as Predefined Value in wufoo. Must exactly match name of event in LII.
Event Date	Date this event is scheduled to begin	<ul style="list-style-type: none"> Use wufoo hide command. Enter event date as Predefined Date in wufoo. Must exactly match start date of event in LII.
Date Created	Date the individual registered	<ul style="list-style-type: none"> Not needed on form. Will automatically be included in export file from Wufoo.

REQUIRED FOR EVENTS WITH FEES

When accepting fees for a registration, the fields in the table below are required, in addition to the fields in the table above.

Field Name	Description	Notes
Fee Name	Name of the Fee	<ul style="list-style-type: none"> Use wufoo hide command. Enter fee name as Predefined Value in wufoo. Must exactly match name of fee in LII.

Amount	Amount of the Fee	<ul style="list-style-type: none"> • Use wufoo hide command. • Enter fee amount as Predefined Value in wufoo. • Must exactly match amount of fee in LII.
Payment Date	Date of Fee Payment (Use wufoo field)	Create a duplicate of the wufoo Date Created field, which is automatically added to export file.
Payment Total	Amount Paid as part of this registration	Use wufoo Payment Total field, which is automatically added to export file.
Level 1	Attendance Class Level 1	<ul style="list-style-type: none"> • Not needed on form. • Manually add to import file.
Level 2	Attendance Class Level 2	<ul style="list-style-type: none"> • Not needed on form. • Manually add to import file.
Level 3	Attendance Class Level 3	<ul style="list-style-type: none"> • Not needed on form. • Manually add to import file.
Level 4	Attendance Class Level 4	<ul style="list-style-type: none"> • Not needed on form. • Manually add to import file.

EXPORT DATA FROM WUFOO

The first version of our integration with Wufoo requires you to export your form entries from the Wufoo site, and import into your Logos II Church Management program. This section describes the **export process**. Please review the following [Import into Logos II](#) for directions on that process.



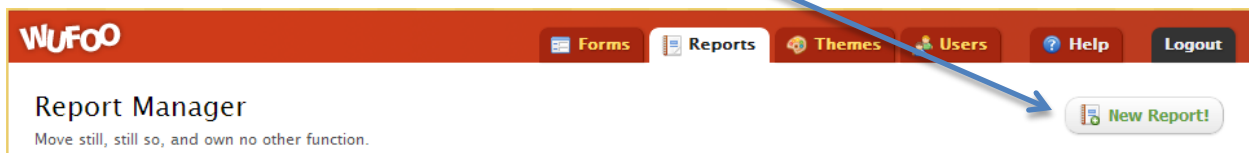
Additional report options are available, beyond what is described in this document.

Please see Wufoo's online help documentation on [creating reports](#) and [exporting your data](#).

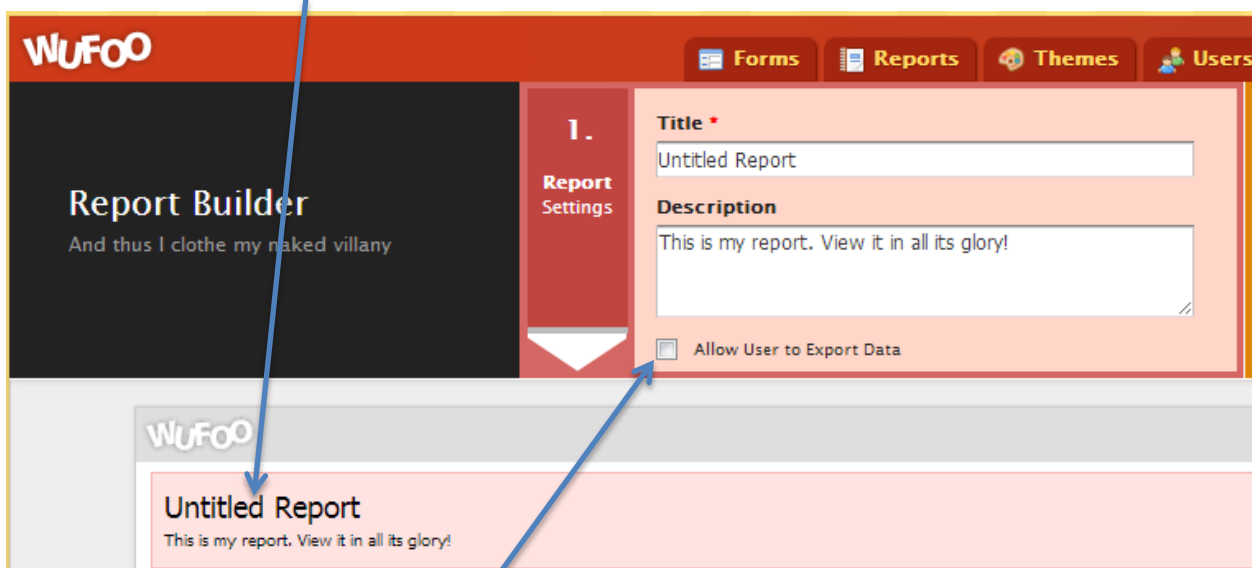
STEP 1: CREATE A REPORT

Before you can export the data from your forms, it's necessary to build a report in Wufoo gathering all the information you need to be included in the export. Each form should have its own report.

1. In Wufoo, click on the **Reports** tab, and click the **New Report** button.



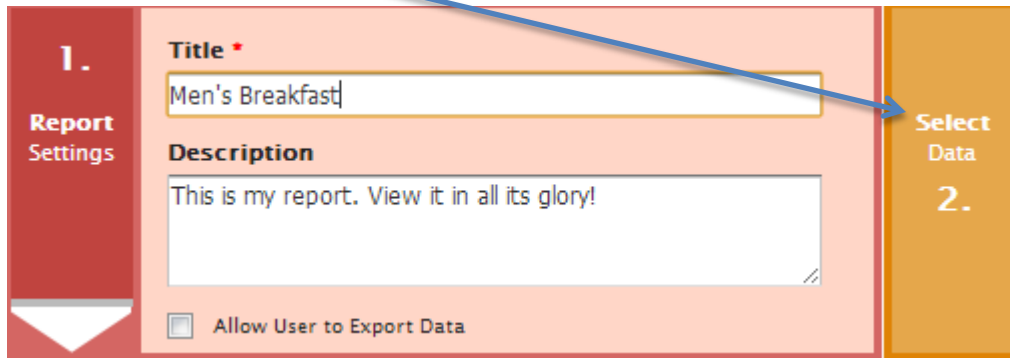
2. Click on the **Untitled Report** section to display the **Report Settings** window and define a title.



We recommend you title your report the same as your form, for easy identification.

3. Check the **Allow User to Export Data** box.

4. Click on the **Select Data** window.



1. Report Settings

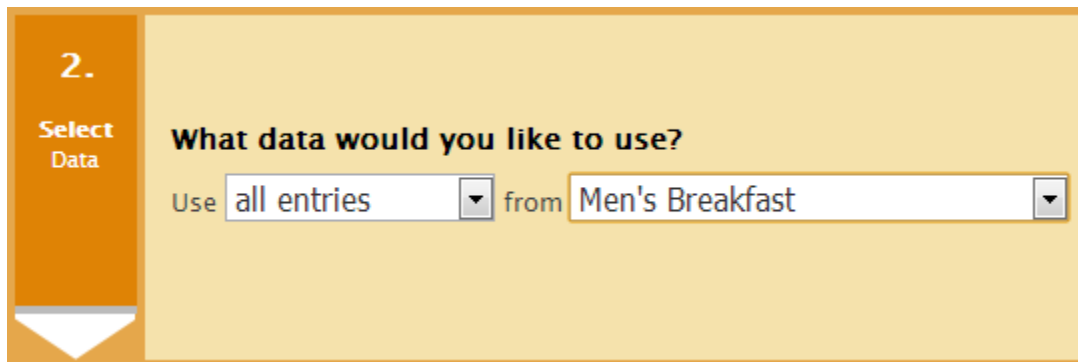
Title *
Men's Breakfast

Description
This is my report. View it in all its glory!

Allow User to Export Data

Select Data 2.

5. In the **Select Data** window, choose the **all entries** option and the name of your form.

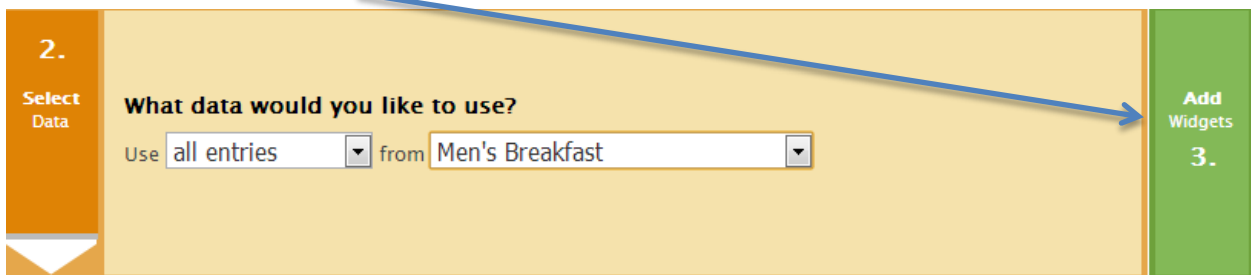


2. Select Data

What data would you like to use?

Use **all entries** from **Men's Breakfast**

6. Click on the **Add Widgets** window.



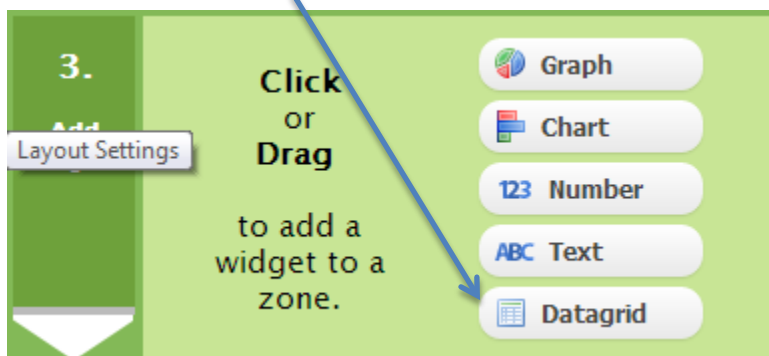
2. Select Data

What data would you like to use?

Use **all entries** from **Men's Breakfast**

Add Widgets 3.

7. Click on the **Datagrid** option and drag it down to the report area below.



3. Add Layout Settings

Click OR Drag
to add a widget to a zone.

Graph

Chart


123 Number

ABC Text

Datagrid

- Click on the data grid below to open the **Widget Settings** window.

- Click the **Show All Columns** box. Then scroll down and verify all required fields are checked.

 Any fields that are not marked will not be included in the report data, and cannot be exported. Any time you add new fields to your form, you **must** edit the report and select that field to be included.

- Click the **Save Report**  button.

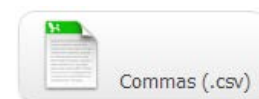
STEP 2: EXPORT DATA

Once your form is published, you've created a report, and users have begun registering, you can export the form entry results and import them into your Logos II program.

- In Wufoo, click on the **Reports** tab.

- Find the report you created, and click the **Export** button.

- A pop up window provides multiple file format choices. For easiest import into **Logos II**, we recommend you select **Commas (.csv)**.
- After clicking on the Commas option, the exported file will download to your computer.



STEP 3: FORMAT EXPORT FILE

If you've correctly configured your form according to the [steps above](#), your export file won't need much formatting work. Here are some items to review and change, if needed:

1. Date fields should be formatted as **mm/dd/yyyy**.
2. If you've been accepting fees for this event and wish to include the payment info in the import file:
 - a. Duplicate the **Date Created** column and title the new column **Payment Date**.
 - b. You'll need to manually add the **Logos II Attendance Levels** to the file. Without the Attendance Levels, the registration will not import.
3. If you have defined multiple fees in Logos II for an event, in your file you'll need to create a separate line item for each individual for each fee. For example, if your event has a "T-Shirt" fee and a "Lunch" fee, you'll need to create two line items for each individual who has registered, one for each fee. The info in both line items will be exactly the same, except for the **Fee Name** and **Amount** fields. The entries in those fields will be specific to each fee.

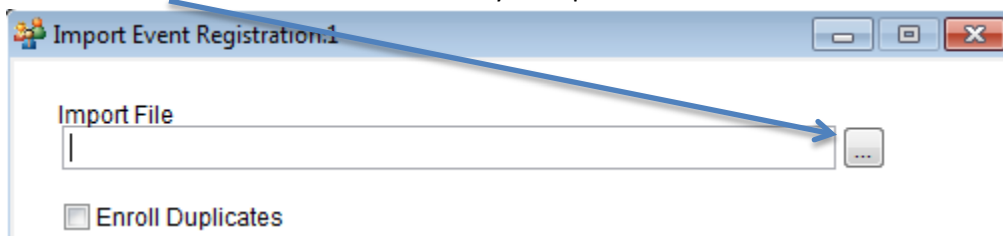
IMPORT INTO LOGOS II

This section provides the steps to import your exported Wufoo form data into the **Event Registration** module in **Logos II**.

1. In Logos II, go to the Utilities menu in the **Event Registration** module, and choose the **Import / Export** option, and then the **Import Registrations** option.



2. Click the browse button to select the file you exported from Wufoo.



3. If you allow duplicate registrations for this event, check the **Enroll Duplicates** box. Otherwise, any duplicates will not be registered for the event.
4. Once selected, click the **Next** button.
5. When the import grid displays, if you've titled your fields in accordance with the [Form Requirements](#) section above, the columns will already be automatically matched. Columns that are matched will display the field title and be highlighted in purple. Unmatched columns will be gray and display **Column_1**, **Column_2**, etc.

Matched Column	Unmatched Column						
<table border="1"> <tr><td>Member ID</td></tr> <tr><td>Membernum</td></tr> <tr><td>9.07</td></tr> </table>	Member ID	Membernum	9.07	<table border="1"> <tr><td>Column_1</td></tr> <tr><td>Membernum</td></tr> <tr><td>9.07</td></tr> </table>	Column_1	Membernum	9.07
Member ID							
Membernum							
9.07							
Column_1							
Membernum							
9.07							

6. To match a column, click into that column in the grid, then select the corresponding Logos II field in the Define Grid Column above.

Define Grid Column as:

7. Once all fields are matched, verify the check box in the bottom left corner, **Ignore first line (contains Header)**. If you have column headers defined in your import file, make sure this box is checked. Otherwise your column headers will be added as part of the import and you'll receive an error.
8. Click **OK** to proceed with the import.

After the import completes, if the routine found any duplicate registrations a report will display alerting you. If you marked the **Enroll Duplicates** box in step 3, the duplicates will have been registered. If you did not mark that box, they will have been removed by the import.

MATCHING PROCESS

If your event has Guest Registration enabled, your import file may contain registrations that are not linked to an individual in your Logos II data. Therefore, the import routine will not be able to automatically link those registrations to the correct Logos II member records.

1. For those registrations, a Select Individual window will display.
2. The bottom of the window will list the current record from your file that cannot be automatically matched. Referring to the Name entry, search in the grid above to find the matching Logos II member record. Double click on the record, or click once then click the OK button, to link the registration to the selected Logos II individual. Or, if the individual does not exist in Logos II, use the buttons at the top (New Family, Add to Family, New Organization) to create a new member record in your database. If you click the Cancel button, the current record will be removed from the import and the process will continue on to the next record. This Select Individual window will display for every guest registration in your import file.