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Getting Started

This tutorial will guide you through the use of the EasyREG program and how it can be best be used to make the administration of your Upward program a success. EasyREG was designed to integrate the accepting of online registrations and importing of this data into the Upward MSP program as effortless as possible.

The basic steps in integrating EasyREG into your Upward registration process is as follows:

1. Use EasyREG to create your program registration forms (directions below). Once the form is complete and tested, place the link to this form on your web site and begin accepting registrations. Use our integration with Paypal to collect your registration fees.
2. Install the ULM software that is provided to you by Upward Unlimited. Enter in all the required information to create your program (dates, administrators, users, etc ...).
3. Once your registration period is complete view your registrations in EasyREG from either the Approved or Paid status pages. Click on the "Evaluation Form" link provided and print out all of your evaluation forms. Use these forms to collect player skill data, and uniform sizes on your evaluation nights as well as the required liability waiver signatures from the parents/guardians (unless you did waiver acceptance online).
4. After evaluation night is complete use the EasyREG "Export Data" tool to export all of your player, coaches and volunteer data into files which can then be imported into the Upward ULM software.
5. Validate that all of your data was correctly and completely imported. Use the Upward ULM software to finish organizing your teams and coaches.
6. Use EasyREG's "Broadcast Message" tool to keep the players and parents advised on program developments (ability to broadcast out an email to everyone registered).

Creating an Upward Event

All Upward programs begin with the creation of an event from the main EasyREG screen so that you can build your registration form and accept registrations. From the main screen click on the "Create New Event" link located at the top of the page. There are several steps to fully configure a new event, however, only a few of them are mandatory. Please note that all the inputted event information on this page can be edited at another time. Below find a list of the steps that you should consider in the creation of your new Upward registration event.

- **Setup Name.** Choose the event year and then a title for your event (example: Upward Basketball – Winter 2007). Choose the year your program will be held in.
- **Setup Event Type.** Since this is an Upward event, choose the appropriate Upward program from the drop down list. Do not select that this is a "Registration Event".
- **Setup Email Notifications.** Under "Setup Email Notifications" we suggest that you turn all your notifications to the ON position. Once you create your event you will be asked to edit your email that you send to each registrant. By doing this you will be instructing EasyREG to send to your registrants emails, customized by you, for each part of the registration process (Pending, Approved and Paid). Note that when you create your registration form from our Form Library you will also have the chance to "borrow" our prewritten email templates to help get you started.
- **Setup Online Payment Capabilities.** If you wish to accept credit card payments for your event you must obtain a Paypal account and then turn on the online payment capabilities here. If you wish to do this, but do not yet have a Paypal account, you may skip this step and come back to it at a later date. One thing to note is that with Upward programs there are always a set of fees. If you wish to collect these fees through a method other than Paypal, please be sure to **check the appropriate box** in this section. Doing so alters the messages registrants see on the screen during registration and allows them to understand that there are fees associated with the event but that they will be collected using another method. For full instructions in using our online payment functionality see our section "Accepting Online Payments".
- **All other fields can be left at their default settings.**
- **Hit the "Create New Event" button.**
After event creation EasyREG automatically provides to you default email templates as well a default registration form for the Upward program that you just created.

Editing your Email Templates

Ability to edit your email templates can be accessed through the “View Registrations” page or immediately after you create your event. There are 4 emails that can be sent to your registrants. They are:

- **Pending Email.** This email is sent after the initial registration submission and tells the registrant that their request was successful and that you have a request from them to participate in event.
- **Approved Email.** This email is sent once you have approved the registration for the event. At times payment instructions are included in this email if the event has a fee accompanying it and the registrant wishes to pay via check. The approval email also gives you the capability to include in a shopping cart payment link. This link provides a way for the approved registrant to pay for the event in case they had not done so during the initial registration process.
- **Paid Email.** This email tells the registrant that their money has been received and that they are all paid up for the upcoming event.
- **Payment Email.** This email template is located off of the “Account Settings” page and is a general, account wide, email template with payment instructions when a registrant chooses to “Pay by Check”. It includes the wording you enter in plus an itemized bill of each invoice fee. In general you should put in your mailing address and attention too details for any check payments to your organization.

All email templates come with a basic email setup. Since you are created an Upward program you received default email templates during the event create process that are Upward specific. At this time you may choose to view each template for your registration form (Basketball, Soccer, Cheerleading, Flag Football, Volunteer or Coaches). If not now be sure to review all emails before making your registrations “live”.

Creating your Upward Registration Forms

Upward events are different from other events that you may create registration forms for because they have their own software program designed to use this data. In order to use this software you need to be able to export your data out of EasyREG and into the Upward software. It is for this reason that we have created registration forms for you to use as a starting point for all your Upward events. Although we have already given you your registration form on event creation they are also presently available from your online "Form Library" for the following events:

- Upward Basketball
- Upward Soccer
- Upward Cheerleading
- Upward Flag Football
- Upward Coaches sign-up form
- Upward Volunteer/Referee sign-up form

With the use of EasyREG's "Build a Form" tool, you will be able to edit and add to these forms create forms in a manner of minutes. It is important to note here a few things to avoid when customizing your Upward forms:

- Upward Basketball, Cheerleading, Flag Football and Soccer forms have all the fields required to conduct a complete registration. You may wish to add a few fields to this form BUT do not remove any of these fields.
- Common fields that need updating are STATE and GRADE. Also some optional fields (Carpool link, Coaches link) can be deleted if you do not want to offer this option.
- **Never change the name of a field! You are free to alter the description (question of a field but the name of the field is integral to the ability of EasyREG to recognize and export your data correctly.**
- Upward volunteer and coaches forms are a bit more flexible. Again, we encourage you to add additional fields but any fields marked as required (**red ***) should remain in the form to allow for proper importing.

- **Borrowing a form or an Upward banner image**

You already have a fully functioning Upward registration form. If you make a mistake and want to "start again" you can visit the "Form Library" and borrow the appropriate Upward form for the event you are creating. Note that the borrowing of a form will overwrite the existing form that you presently have. Along with borrowing a form you can also borrow an Upward banner image to display at the top of your form. Some churches may choose to use their own church banner image but if you wish to use the appropriate Upward logo just click on the "borrow banner" link to do so.

- **Editing the form**

Now you have a fully functioning Upward registration form that you can save and start using immediately. This form contains all of the fields required by Upward for the particular program that you will be running. If there are no changes to be made, proceed on to the "Saving the Form" step below. If you wish to make further changes, read on. Please note that you should not delete any fields in this form that are marked as required (noted by a red asterisk on that form line). A required field means that EasyREG will not allow the registrant to complete the registration process until that form is filled in with a valid value. You may edit the explanation of that form if you like, just do not edit the field name for that form. Once again it is important to note that if you do delete important fields in this form your registration form will not work properly. If you feel that you have messed up the form you can always reimport the form from the "Form Library" page and start again!

- **Adding form fields** – Besides the required Upward form fields you may have other information that you wish to collect during the registration process. To add additional fields simply click on the form field box that you desire to add from the “Edit your Form” page. You may add as many fields as you like.
- **Changing form field descriptions** – You may, on occasion, wish to change the description (or question) for an existing field in the form. To do so just click on the edit link next to the form you want to change, make your changes, and then click on the Save button to commit your changes.

- **Previewing and Testing your Form**

Once you have finished editing your form you will want to preview it and test it out before saving it and getting it ready for your registrants. Previewing your form allows you to see what it will look like (minus your personal graphics) and testing it out. Testing is a very important part of the form building process. Data does not always go in as you would think and it is important that you are happy with the final data values before accepting live registrations. This is not as big an issue with Upward programs since you will be exporting your data into another program, but we still suggest that you test out your form.

To preview your form, click on the “Preview your Form” button found at the bottom of the page where you have been editing your form. From this new page you can add in registration data (like it is a live form) and hit the Submit Registration button to review your data entries. Each test registration that you submit will send out any pending emails that you have created and will show up in your events “View Registrations” page. Once you are finished testing you will want to delete these test registrations.

To delete your test data click on the Hold box for each registration and click on the “Update Registration Status” button at the bottom of the page. Once in the Held state you will have the opportunity to delete the registrations.

- **Saving your Form**

Now that you have finished editing and testing your form you need to save it. Saving your form is the mechanism used to create the actual registration form that you will link to and that your registrants will use to enter in their registration request. Once you have saved your form you will be presented with a link to that form which you can then place on your web site. Once you have saved your form, if you later decide that you need to update it with a newer version, you can simply replace it by editing the form and doing a save again. This will replace the current form with your newly updated version.

To save your form go to the bottom of the Preview Form page and click on the “Save Form” button. After saving you will be presented with a screen telling you the full location of your saved form. Place this form on your web site ... you can now begin accepting your registrations!

- **Private Branding your Form**

One of the neatest parts of EasyREG is that you can private brand your forms so that they look exactly like your web site. Doing this gives the impression to your registrants that they are never leaving your web site when they click on your registration link (to the form stored on our site). It is during the “Save Form” part of the registration form process that your graphics are added into your registration form. To activate this capability, send EasyREG an email (support@easyreg.org) and attach the image file that you would like to use as the top part of your registration form.

As well as your own private banner image you can also use our default Upward logo artwork. This artwork is updated each year (on approval of Upward Unlimited) and can be very useful

if you share your Upward program with other churches and want to present a more generic registration form that all can register with.

Printing Evaluation Forms

EasyREG will provide to you printable evaluation forms that can be used on evaluation night to gather all the necessary skill information needed to compute your evaluation scores. If your event type field is set to an Upward event (Basketball, Soccer, Flag Football, Cheerleading) then the "Eval Form" column will appear with a link to the evaluation form print utility once the player has entered either the Approved or Paid state. Also included in this utility is the ability to print out the liability waiver form in case it was not accepted online during the registration process. Note that some data will be populated in (data received during the registration process) but will be a small enough font so that you can write over it if the data received on evaluation night differs. Data entered (when appropriate) will be things like height, uniform sizes, etc ...

Accepting Online Payments

EasyREG, through our integration with Paypal, offers to you the ability to accept credit card payments for your Upward programs. Setting up and using Paypal is an easy process. By far the biggest part of the process is creating your Paypal account (have an account already ... you are more than half way there). Here then are the steps required to get your credit card processing up and running.

- **Setup a Paypal Account.** EasyREG requires a valid Paypal account and confirmed email address in order to use the payment part of our program. Paypal is the company responsible for the credit card processing and event fee collection for your account. Paypal is used by millions of users daily for a variety of reasons, including use on the eBay auction site. For more details on Paypal visit their site at www.paypal.com.
- **Locate the Create/Edit Events Page.** Once you have your Paypal account setup you are ready to accept credit card payments for your event fees. If you are creating a new event click on the "Create New Event" link at the top of the main page for your account to access this functionality. If you are adding these fees to an existing event, click on the "Edit Settings" link that is associated with your event. You will find the Payment Settings fields located at the bottom of these pages.
- **Verify your Paypal Primary Email Address.** The Paypal primary email address is entered in on your "Account Settings" page and is the same for any event. The primary address is the one used to log into your account and can be found by clicking on Profile -> Email once you are in your Paypal account. This address is used during the payment verification process and allows EasyREG to mark your registrations as paid once we receive a payment confirmation from Paypal.
- **Enter your Paypal Email Address.** The first field to enter is a Paypal address that is linked to your Paypal account. This address can be the primary or any secondary paypal email address but it **must be a confirmed email address in Paypal** in order to function properly in EasyREG. If you are not sure simply log into your Paypal account and click on Profile -> Emails to see that status of each of your email addresses.
- **Activate Your Paypal Account.** After entering your Paypal email address you will see three choices to indicate your payment status. These three choices are:
 - **I do not wish to use Paypal at this time.** This choice is the default value and is used if there are no fees of any kind associated with this event (unlikely for an Upward program). You may still enter in your Paypal address and event fees which will be saved, but your ability to collect these payments will not be displayed as long as your event is in this state.
 - **I wish to activate Paypal and use it to collect my fees.** This choice will activate your payment process. You will not be able to make this choice if you do not fill in a Paypal address (above)_and at least one fee with accompanying fee description.
 - **I have fees for this event but do not wish to use Paypal to collect them.** This is an important choice if you do have fees but do not want to use our system to collect them. By choosing this you enable EasyREG to present screen displays to the registrant informing them that there are fees associated with the event and that they will be receiving instructions on how to pay for them. Our assumption here is that you will then use our email template system (probably the approved template) to communicate with your registrants the fees required and how to pay for them ("Send check for \$50 to ...").
- **Setting Up Your Event Fees.** New in EasyREG is the ability to have multiple fees and do be able to mark them as a required or optional fee. To create your fees simply put the dollar amount in the Fee column and then a brief description of the fee in the description

column. By default there are three lines of fees available to use. If you have a need for more than three lines, fill in the first three, save your event, and then go back into the "Edit Settings" page. Proceed to the bottom of the page where you will find your previous fees listed plus an additional 3 lines to use as you wish. You may not enter a fee without an accompanying description.

- **Save Your Changes.** Now that you have completed your fees, save your event changes and you are ready to go.

[For full tutorial instructions on entering fees and seeing how they will appear, please refer to our online fee tutorial link.](#)

How the Registration/Payment Process Works

EasyREG's integration with Paypal provides for a flexible payment system. When a registrant fills out your event registration form, and then submits the registration request, they are brought to a series of screens that will walk them through the registration process. These screens will allow them to add in fees (required or optional), register other people for this or other listed events and pay online or choose the "pay by check" option.

If the registrant wishes to register another individual then all their fees will get combined into a single payment. The Paypal receipt that you receive will include the name of the individual who paid you, the event that the fees are for as well as the registered individual for each of these registrations.

A Word on Registration vs Non Registration Events ...

One thing to note is that all types of events (Registration and Non Registration events) allow you the ability to accept fees. The only difference is that with Non Registration events the user is not given a choice to register another individual for an event as Non Registration events are seen as stand alone events.

Exporting your Registration Data

There are two types of exports available in EasyREG, Standard and Upward. As an Upward customer you will probably have times where you will want to perform both types of exports. Upward dictates which fields in the form can be imported out of your form and into the Upward software and our defined registration forms found in the Form Library provide for that export/import capabilities. The Upward export option will accommodate creating the proper Upward import file. Any additional fields that you might add to your forms can also be exported and then viewed in any spreadsheet program (like Microsoft Excel). The standard export option will allow for creation of this type of file.

Exporting Upward Data

To export your data into an import file that Upward understands do the following:

- Click on the “Export Data” link off of the View Registrations page.
- In Step 1 choose the proper Upward import format (Player, Coaches, or Volunteer)
- Proceed to Step 3 and choose your data range (you can export date range, status type or all of your data).
- Press the Export Data button
- Download the data file created on the results page by right-mouse clicking and saving the file to your PC (use the Desktop location for this example).

EasyREG Export Formats

- **Standard Export:** This format allows you to choose which data fields you would like to download and then puts them in a tab delimited file. This file can then be imported into a spreadsheet program such as Microsoft Excel to sort and organize in any manner that you like. This is the most common type of export, except for Upward registration events.
- **Upward Export Formats.** This format allows for the creation of an import file that the Upward software program can use to take in all of the registration data that you have collected via the EasyREG program. There are 3 types of Upward exports and it depends on whether you are exporting player, coaches, or volunteer/referee data. Depending on the event type that you designated when setting up your event initially you will see one of the following types of export options.
 - **Players:** This format is specifically used to export player data into the Upward software program. Players can be either Basketball, Soccer, or Cheerleading registrations. All fields that are not Upward software specific fields will NOT be exported into this file. Any field whose name was changed during the edit process by the administrator also will not be exported. The file will be specifically formatted to allow you to import it directly into your Upward software program.
 - **Coaches:** This format is specifically used to export coaches data into the Upward software program. All fields that are not Upward software specific fields will NOT be exported into this file. The file will be specifically formatted to allow you to import it directly into your Upward software program. In order for this export to work properly EasyREG’s Upward coaches registration form must be used.
 - **Volunteer/Referee:** This format is specifically used to export volunteer/referee data into the Upward software program. All fields that are not Upward software specific fields will NOT be exported into this file. The file will be specifically formatted to allow you to import it directly into your Upward software program. In order for this export to work properly EasyREG’s Upward volunteer registration form must be used.

The most important thing to remember is that the Upward software program only will accept a certain amount of information for use in their software program. Any additional data fields that you added to the Upward forms can be used by you to help organize your event but will not be imported into the Upward program when exporting your data from EasyREG.

Importing your Upward Data

Importing your file into Upward's ULM software is quite easy. After creating your event in the ULM software click on the appropriate tab (Players, Coaches, Volunteers). In the upper right side of the screen you will see an "Import Players" button. Click on that button and import in your data using the file created from the EasyREG export process.

ULM does a pretty good job of validating the data and providing information regarding the import. Please watch the ULM screens carefully to be sure all of the data you thought was imported actually got imported.

Importing Fee Data: Currently (Fall 2007) only one payment fee can be imported (the main registration fee). In order for this option to work completely **the names of every registration fee has to be one consistent name**. This requirement is on an event by event basis (so your cheerleading fees can have a different name from your basketball fees). Example:

Fee Description: **Upward Registration Fee** or **Basketball Fee**

When importing in the Upward data you will see a drop down list of all fees listed in your event settings page. Choose the fee description that matches your registration fee. During the export process EasyREG looks at all the fee descriptions within each invoice and inserts the fee amount that matches that description. **Note, if you enter in fees manually you also need to keep the naming convention consistent with what you entered in your event settings fee section.**

Fixing Bad Data

From time to time you may find bad data that Upward has found. In most cases the fix is obvious and simple to perform. You can fix the bad data in one of two ways (temporary or permanent). We obviously recommend the permanent way. **Note that all records that contain bad data will not import into the Upward software until the bad data is fixed.**

- **Permanent Fix** of bad data can be done by finding each individual registration record that has bad data and fixing it. You can do this by finding the faulty record on your View Registrations page for this event, clicking on the Edit link, and fixing the bad data for each instance pointed out in the IMPORT_LOG.txt file. After performing all of the updates simply recreate your export file and try the import validation again.
- **Temporary Fix** of bad data can also be performed. This is a faster method but your changes are not committed to the database in EasyREG, only your Upward database. To perform a temporary fix, open the suspect import file in Excel, update all the fields that need to be updated, and then save the file as a CSV (comma separated file) with the Excel program. Now you can proceed to validate your data again and complete the reimport process.

Importing Data Multiple Times

Presently the Upward ULM program (version for 2007) allows you, during the import process, to choose if you want to overwrite existing data. This means that if a player exists in the current database, and ULM sees that players data, you are telling them to keep it or overwrite it with what you are currently importing. Please be careful to choose the correct option that you desire.

Also, when setting up new events EasyREG suggests that you do not choose to import in last years player data. With our export feature this is not necessary and since player personal data may change from year to year it is best to start fresh each year.

Multiple churches using the same EasyREG account

EasyREG allows you to share your account with several churches wishing to combine together to run one single Upward account. In order to accomplish this several things need to happen.

- **Selecting an Upward URL.** Each EasyREG account has the choice of having two URL's associated with it. One is the churches main web site. The second is to the churches Upward web site. If you are a church sharing an Upward program with other churches you should (if you have not done so already) setup a common Upward site for your programs (view www.roanokeupward.com for an example of this). Usually when EasyREG wishes to link back to the churches web site we use the default church address. In the case of Upward programs however we will use the Upward URL. If there is no distinct Upward URL then just reuse the main web sites URL. **All of these settings can be found and edited on the Account Settings page directly located off of the main page.**
- **Selecting a form banner image.** When you save your registration forms you can (if one was provided) integrate in a banner image to display across the top of your Upward forms. In the case of several churches using the same account this is not always desirable. To solve this issue two things can be done.
 - **Create a new common Upward banner.** You can always choose to create a common Upward banner image that both churches can use on your forms. If you do so it will become the main default banner image for all registration forms created out of that account. This is not always desirable if the church owning the account also wishes to use it later for non Upward programs.
 - **Use the Upward banner images found in the form library.** Present in the form library are default Upward logo's and banner images available to all. These images are used with the approval of Upward Unlimited and provide a way to display a nice, generic form that can be used by multiple churches. To use these banners just "borrow" them into your form from the Form Library page.