

Edit Event Registration Link

Article Number

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Information

Constituents can access their event registrations and edit those registrations directly through a link in the confirmation email.

The primary registrant can use the Edit Registration link to edit guest information at any time, including un-registering a guest for a non-fee based activity. When the primary registrant comes back to the site through the edit registration link, they will see the fees previously purchased for themselves and their guests for the main event and the activities. The primary registrant is able to do the following:

- Edit the fields in the main registrant category and the guest category.
- Purchase additional tickets for guests that did not already have a ticket purchased for the event and/or activity.
- Add additional guests and purchase fees to the event and/or activity for that guest.
- Un-register themselves or a guest from an activity if the activity doesn't have commerce.

The primary registrant **cannot** do the following:

- Change the fees associated with themselves or their guests. (Example: Change from a student fee to and alumni fee.)
- Remove fees purchased or remove guest fee purchases.
- Remove a guest that purchased through a commerce item or a fee control.

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Member Confirmation Email

The constituent will see a link in the member registration confirmation email with the verbiage **Click here to edit your registration information.** (This link verbiage can be changed in the member confirmation email editing tool.)

Clicking the link will take the constituent back to the event registration form and present a pop-up window asking the constituent to confirm that they want to edit the registration. (This window prevents multiple registrants from using the same email address to register, and also ensures that the link in the email was used to reach this editing step.) Once the confirmation button is clicked, the form will appear for editing.

NOTE: Verbiage will display on the registration form letting the constituent know that registrations/purchases can be added, but not reduced (and that they will need to contact the institution for refunds).

After editing a registration, the constituent will receive another confirmation email, outlining the most recent registration change/details.

NOTE: The confirmation email the constituent receives *AFTER* making a change to the initial event registration will not reference the previous registration details. For example, if the constituent purchases four tickets initially, and then edits the registration by purchasing another two tickets, the second confirmation email will only reference the two tickets purchased.

NOTE: If the [EditLink] token is not in the email, the link is added to the bottom of the message.

Admin Confirmation Email

Although it is not added by default, the Edit Registration link can be added to the admin confirmation email. (It works a bit differently from adding our regular tokens for member fields.) You will need to use the content editor hyperlink manager to add it. Put the token value [EditLink] in the URL line, then put in your verbiage for the Link text.



Reporting

In event reporting, only one line per constituent will display for non-commerce registration changes. For registration changes that involve commerce, reporting will display one line per transaction. If a user comes back in and edits their submission, it will be tied to the original submission. Subsequent transactions made while editing an event registration will result in additional rows.

The system will look at both the date added and the last updated date when you pull reporting for date ranges. For example:

7/1 - Member registered for event

7/3 - Member edited the event registration

7/4 - Member edited the event registration again

Running the report on 7/2 with a date range of 7/1 - 7/1 would return the original registration only. Running the report on 7/5 with a date range of 7/1 - 7/1 would show the registration with the updates from 7/3 and 7/4. Running the report on 7/4 prior to the 7/4 edit with a date range of 7/3 - 7/3 would show the two rows from 7/1 and 7/3. Running the report on 7/4 after the 7/4 edit (or at any time in the future) with a date range of 7/3 - 7/3 would not return any rows (since last updated is now 7/4).

Business Rules

- Regular non-instance data is pre-populated for the member from the last known value submitted.
- Event roles will override the edit registration link, meaning that if the event requires authentication the member will have to log in.

- If a user edits their registration, they still get only one row in export (the exception is, of course, commerce transactions).
 - The feature is set on a form by form basis and the default is to enable the editing of an event registration.
 - Once a form has a registration, the edit registration capability cannot be turned off because an email with a link in it would have already been sent.
 - Event/member and ticket/registration limits will still be enforced.
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- If records are merged either due to an Identity Checkpoint match or a non-member merge import file, the edit registration link will take them to the correct constituent record after the merge.

Edit Registration on a Form-Driven Event

When a member comes back to the site to edit their registration for a Form Submission based event the following will occur:

- The registrant is able to edit the fields in the guest category and the main registrant category. Example: Change a guest's name that was spelled wrong. These changes are reflected in reporting, export, etc.
- The registrant is able to add additional tickets to the activities for the primary registrant and/or guests if the commerce item field was used.
- If the fee control is used on the activity, the registrant is not be able to change the selection for themselves or their guests. The fee control shows the previous selection and is grayed out with messaging around the control letting the registrant know about their previous purchase.
- The registrant is able to add additional guests.
- The registrant is able to remove a guest that does not have commerce associated with them.
- The registrant is able to register for additional activities for the primary registrant or the guest by checking the box next to the name.
- The registrant is able to unregister themselves or a guest for an activity that doesn't have commerce.

Any additional registrations or purchases are added to the form submissions / adjustment grid the same way new registrations or purchases are added.

Edit Registration on an Activity-Driven Event

When a member comes back to the site to edit their registration for an Activity-Driven event the following will occur:

- The registrant is able to edit the fields in the guest category and the main registrant category. Example: Change a guest's name that was spelled wrong. These changes are reflected in reporting, export, etc.
- The registrant is able to add additional tickets to the activities for the primary registrant and/or guests if the commerce item field was used.
- If the fee control is used on the activity, the registrant is not able to change the selection for themselves or their guests. The fee control shows the previous selection and is grayed out with messaging around the control letting the registrant know about their previous purchase.
- The registrant is able to add additional guests and purchase additional tickets for that guest to the activities through the commerce item or fee control.
- The registrant is able to remove a guest that does not have commerce associated with them.
- The registrant is able to register for additional activities for the primary registrant or the guest by checking the box next to the name.
- The registrant is able to unregister themselves or a guest for an activity that doesn't have commerce.

Any additional registrations or purchases are added to the form submissions / adjustment grid the same way new registrations or purchases are added.

Edit Registration on a Fee-Driven Event

When a member comes back to the site to edit their registration for a fee-based event the following will occur:

- The registrant is able to edit the fields in the guest category and the main registrant category. Example: Change a guest's name that was spelled wrong. These changes are reflected in reporting, export, etc.
- The registrant is able to add additional tickets to the main event or activities for the primary registrant and/or guests if the commerce item field was used.
- If the fee control is used on the main event or activity, the registrant is not be able to change the selection for themselves or their guests. The fee control shows the previous selection and is grayed out with messaging around the control letting the registrant know about their previous purchase.



- The registrant can add additional guests and purchase additional tickets for that guest to the main event and activities through the commerce item or fee control.
- Guests that were previously added will appear with messaging around the the control label letting the registrant know what was previously purchased for a guest. The registrant should not be able to remove a guest that has previously purchased through a commerce item or fee control.



- The registrant is able to register for additional activities for the primary registrant or the guest by checking the box next to the name.
- The registrant is able to unregister themselves or a guest for an activity that doesn't have commerce.

Any additional registrations or purchases are added to the form submissions / adjustment grid the same way new registrations or purchases are added.

Similar changes are applied to the Data Entry mode on the admin side when viewing a registrant who has previously registered.

Edit Registration on a Simple RSVP Event

For **Simple RSVP Events**, the primary registrant will be able to change the response to the 'Are you attending?' question for themselves, but not their guest.

When an event registration is edited, a confirmation email is sent to:

- The primary registrant
- Any new guests that are added to the event if the 'Send guest confirmation email' option is selected
- Any guest that was updated if the 'send guest confirmation email' option is selected

When a member comes back to the site to edit their registration for a Simple RSVP event the following will occur:

- The registrant is able to edit the fields in the guest category and the main registrant category. Example - Change a guest's name that was spelled wrong. These changes are reflected in reporting, export, etc.
- The registrant is able to change a 'Yes' RSVP to 'No' for the primary registrant.
- A guest can be removed from the registration via the 'X' in the upper right hand corner if no commerce is associated with the guest. If the guest has commerce associated with them, the 'X' will be disabled.
- The registrant is able to add additional guests to the event.
- The registrant is able to remove a guest from the event via the 'X' in the upper right hand corner if no commerce is associated with the guest. If the guest has commerce associated to them, the 'X' will be disabled.
- Any guest that is added to the event through edit or the first time is forced into a "Yes" RSVP.
- A registrant is not able to add a guest and say they are not coming. If the primary registrant respond no, the 'Add Guest' button is disabled and messaging appears.



- A primary registrant can change their RSVP to No and that will keep any guests that were added during the first transaction. It would not keep any guests that are added during the edit session. Also, the 'Add Guest' button gets disabled and messaging appears on the guest step when the primary registrant changes Yes to No.

Any additional registrations or purchases are added to the form submissions / adjustment grid the same way new registrations or purchases are added.

Similar changes are applied to the Data Entry mode on the admin side when viewing a registrant who has previously registered.

KB Product

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