Leader Guide to SmarTrans™
(revised on 12/10/08 – version 3.1.2)

Introduction
The MIT Alumni Association offers a web-based application in the Infinite Connection that automates many of the time consuming tasks of group management for alumni volunteers. The application communicates with the Alumni Association database, which will make record keeping easier and more efficient.

SmarTrans™ allows your group to collect credit card payments for Dues, Donations, and Events, consolidate group records into one accessible database, make year-end reporting and tax filings easier, and get feedback and information for and about your members. Your group can collect registrations for a simple no-fee event or register attendees for a complex multi-day conference or series.

In order to make the transition to the web application as smooth as possible, membership history from the database of record has been uploaded into SmarTrans™ to allow for pre-population of Dues records. If your group has provided membership information to the Alumni office, records for your members will include the historic information along with transactions completed through SmarTrans™.

This guide is designed to simplify the learning process so that you can get started right away. Remember, if you need help or have questions, let us know! Write to smartranshelp@mit.edu, or call the SmarTrans™ Help Desk at (617) 452-2500.

Note:
This guide is provided as a link in the right tool bar of each SmarTrans™ administrator page. It is downloadable as a PDF document and requires Acrobat Reader to access. Additionally, a list of Frequently Asked Questions is also provided as a link below the Leader Guide in the right menu bar on the SmarTrans™ administrator page.
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Getting Started

To manage your group’s SmarTrans account, you must first log in to the Infinite Connection at https://alum.mit.edu/. After logging in, authorized officers can access the SmarTrans™ system from “My Volunteer Tools” page. To be an authorized officer you must:

- hold an office with your group
- be coded in the Alumni Association database as an officer
- have an Infinite Connection account

The SmarTrans™ application can be accessed directly at https://alum.mit.edu/smarTrans/user/Home.dyn

Groups are not available in SmarTrans™ until the Alumni Association has “turned on” the group and loaded historical data. The database behind SmarTrans™ will recognize you as the officer of a specific group or groups after you have logged in.

If you are an officer in only one group, your login will take you directly to the SmarTrans™ administrative Home page (Figure 1). If you’re an officer in more than one group, you’ll be given the option to select which group you would like to manage (Figure 2). Once you have selected your group, you will arrive at the SmarTrans™ administrative Home page (Figure 1). From this page you can administer existing events, create new events, administer or create dues, and view reports on events, dues, or revenue.

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**Figure 1**

**Welcome to SmarTrans™**

**Choose a User Group**

Select the user group you want to manage.

User Group

- Club of Boston

Continue
Dues Management
SmarTrans™ allows you to collect online credit card payments for Dues and Donations. The database for your group might include Dues history previously reported to the Alumni Association, so if this information has been kept current, SmarTrans™ will provide you with a membership snapshot of any of your members. Each time you create a Dues type, it will be added to a web page for Dues collection for your group. You may insert the URL for this page into a "pay now" page on your group's website or send the link out in a broadcast email during your group's membership drive.

If you have members who are uncomfortable paying online and would prefer to send a check or credit card information by mail, after receiving it, you need to send in your group's Dues data (name, dues type, term, amount and credit card numbers) as before to Marilyn Finlay (mfinlay@mit.edu) in the Association. The Association staff will continue to enter this information into the database, so your group's membership records will be complete.

Create Membership Dues
Step 1) To create membership Dues, click the Dues Management link in the center of your group's administrative home page (Figure 1) or use the link in the right tool bar. It will bring up a page that allows you to create new membership Dues, view, modify, or expire existing Dues (see Figure 3 below).

2) To create new Dues types, click in the middle of the page (Figure 3).

3) On the Create a Dues Type page (Figure 4), you will provide all the information needed to create an online Dues payment form.
Select dues type from the drop down list. The most common dues types used by MITAA groups are listed below with common definitions. The description varies from group to group.

**Complimentary**
Free membership in the group, usually offered to the most recent graduates (one year out, for both graduates and undergraduates).

**Regular**
Most popular type of membership offered and most commonly used for classes. Most groups average $25-$35, which provides fiscal support for the group at a price most people will pay.
**Young Alumnus**
Discounted membership may be offered to the five most recently graduated classes. Many groups charge just $15 and some deduct 50% from regular membership.

5) Enter the details of the dues in the description field (up to 450 characters). Include information about benefits for this Dues type such as free newsletter, 10% discount to events, etc.

6) Enter the Dues amount. You do not need to use the $ sign.

7) Use the drop down boxes to select the dues term start and end date (usually starting on July 1 [fiscal year] and ending on June 30 or starting on January 1 and ending on December 31 [calendar year]).

8) Select the publish time period for which your group wishes to collect payments for this dues type.

   Note: the publish start date must be the next day’s date or later. Once published, you are only able to modify the Description and Publish End Date fields. Unless you wish to immediately modify, click Continue. All publish dates start or stop at midnight EST.

9) Repeat step 2–8 to create another dues type.

10) All dues for a particular group are saved in one dues collection form. The URL for this form can be found in the middle of the Dues Management page (Figure 5). If your group has a website, this link can be placed on your site. If your group does not have a site, you can automate Dues collection by sending the URL link in an email.

   Your dues collection form is located at https://alum.mit.edu/smarTrans/dues-login?groupId=146

You can preview your dues collection form.

Create Dues Previoulsy Published Dues

---

**Modify Membership Dues**

Step 1) From the Dues Management page, click on “Modify” link next to the dues type you wish to modify (Figure 6).

2) Modify the Dues description by typing in additional information or change the Publish End date by using the drop downs in the date area. Reminder: once published, you are only able to modify the Description and Publish End Date.
3) Click [Continue]. You will be allowed to preview your changes before saving.

4) Click [Save Dues].

**Refresh Dues**

This feature allows the officer to transfer the information about a Dues type to a successive (later) term. If the Dues currently run from July 1 of last year to June 30th of this year, this feature allows the officer to create new Dues starting in July 1 of the current year and running for a year.

**Step 1)** From the Dues Management page, click on “Refresh” link next to the dues type you wish to modify (Figure 6).

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<th>Dues Term</th>
<th>Cost</th>
<th>Published</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefactor</td>
<td>07/01/2008-06/30/2009</td>
<td>$500.00</td>
<td>YES</td>
<td>View</td>
</tr>
<tr>
<td>Sustaining</td>
<td>07/01/2008-06/30/2009</td>
<td>$200.00</td>
<td>YES</td>
<td>View</td>
</tr>
<tr>
<td>Supporting</td>
<td>07/01/2008-06/30/2009</td>
<td>$100.00</td>
<td>YES</td>
<td>View</td>
</tr>
<tr>
<td>Regular</td>
<td>07/01/2008-06/30/2009</td>
<td>$35.00</td>
<td>YES</td>
<td>View</td>
</tr>
<tr>
<td>Recent Grad</td>
<td>07/01/2008-06/30/2009</td>
<td>$15.00</td>
<td>YES</td>
<td>View</td>
</tr>
<tr>
<td>Associate</td>
<td>07/01/2008-06/30/2009</td>
<td>$0.00</td>
<td>YES</td>
<td>View</td>
</tr>
<tr>
<td>Recent Grad</td>
<td>07/01/2008-06/30/2009</td>
<td>$0.00</td>
<td>YES</td>
<td>View</td>
</tr>
</tbody>
</table>

Figure 6

2) A confirmation screen will display the details of the new Dues type. The Dues term will automatically add the same amount of time as the previous Dues term. If previously a one-year term, SmarTrans™ will add one year to the term dates.

3) If changes need to be made, click Modify and revise. If no changes, click [Save Dues].

The Refresh Dues function is also accessible by the Previously Published Dues screen. If Dues have already expired, they are available for refresh for 364 days. This function works the same as described above.

**View Dues**

From the Dues Management page, you can view existing Dues by clicking on “View” link next to each of the dues type (Figure 6).
Delete or Expire Membership Dues

Step 1) From the Dues Management page, select the dues type you wish to delete or expire from the list of current dues. If the dues have not yet been published, the choice will be Delete. If it has been published, the choice is Expire (Figure 6).

Note: Delete will delete the dues from your historical dues list. Expire simply makes the form unavailable for payment.

2) Click on the Delete or Expire link.

3) You will get a confirmation page asking for you to complete the action. Click Delete or Expire.

Previously Published Dues

You can view all of the current and expired Dues for your group by clicking on either Previously Published Dues on the Dues Management page or the Previously Published Dues link in the right menu bar.

The Dues type, Term Start Date and End Date columns are all sortable by clicking on the title on the Previously Published Dues page. The default is dues type in alpha order. If you wish to view the full description of particular dues, click on the View link at the far right of the dues type.

Pay Dues Online

When an end-user clicks on the dues payment link for your user group (Figure 5), he/she will get a login prompt from the Infinite Connection (Figure 7). SmarTrans™ requires that anyone who wishes to pay Dues must log in with an Infinite Connection account.

Request to Pay Dues

Should the individual not have an account (whether he/she is not an alumnus or just chooses not to have an Infinite Connection account), he/she can use the “send an email” link to send a request to pay dues (Figure 7).

Figure 7
Once completed and submitted, the form generates an email to the Membership Officer on record for the user group. The membership officer then will need to contact the requester to get the payment offline.

Note: in order to include the membership paid by checks in the Association’s database, the club/group’s membership officer must send the member’s name, term, and payment amount information to Marilyn Finlay (mfinlay@mit.edu) in the Alumni office. Once these payment information has been entered, they will appear in the Member Dues History Look Up.

**Add Survey Questions**
Survey Questions may be added to the Dues registration form for a user group to allow the group to collect feedback on member preferences and interests. The Survey Question function is accessed on the Dues Management page (Figure 8).

Dues Management

Use this system to keep track of overall member status for your group, as well as maintain a history for in addition to processing payments, it can show you all current members, help you track revenue and your

It’s easy to set up online dues collection for your group.

• Create the appropriate dues types
• Establish the dues term
• Set the date when the dues collection form will be published

You may send an emailed Dues Renewal Reminder to members in the current fiscal year whose dues are 60 days or to lapsed members. Please note, for clubs the lapsed member list includes only past member area.

Dues Renewal Reminder

Use this system to survey your members or collect valuable feedback from them when they pay dues.

Add/Modify Survey Questions

Collect donations from your members when they pay dues or any time during the year.

Figure 8

By clicking on the Add/Modify Survey Questions link, you can add multiple questions, each with up to 10 possible answers. See Figure 9 for the entry form.

The answers can take the form of radio buttons (only one response), check boxes (multiple choice), or open text fields. Your survey questions and responses should not be longer than 200 characters each and you should not use quotation (“ ”) marks.
• An example of a yes/no (radio button) question is: Have you ever been a member of the group?
• For multiple choice (check box) questions, an example is: What types of events would you like to see the group do? Answer: family, educational, travel, sports, etc.
• An open text question requires the end user/registration to provide feedback to a question such as “Please tell us what you think the group should do for a holiday event”.

Modify a Survey Question
By clicking on the Add/Modify Survey Question link on the Dues Management page, you can modify the Question or Hide it.

If the question is no longer applicable to your group or the term of the dues being offered, it may be hidden by clicking on the Hide button next to each question.
Reorder Survey Questions

You may re-arrange the order of the survey questions by clicking on the [Reorder Survey Questions] button at the top of the form (see Figure 10).

Figure 10

Type a number in the text box next to each survey question to reflect the new order you desire. Click [Save Form] when complete.

Dues Renewal Reminder

Use SmarTrans™ to send an automated email to your current members or your lapsed members (those who have not paid in the current fiscal year).

Steps for sending a dues renewal reminder

1) Click on the Dues Renewal Reminder link on the Dues Management page (Figure 11).

Figure 11
2) On the Dues Renewal Reminder screen, select the radio button for the population to which you wish to send, either Members in the Current Fiscal Year or Lapsed Members (see Figure 12). Note: Members in current fiscal year will include only those whose dues expire in the next 60 days.

Dues Renewal Reminder

Send an email notifying alumni that dues are available for payment.

Send to (choose one):
- Members in the current dues term (Current members whose dues term will end in the next sixty days.)
- Lapsed Members

Continue Cancel

Figure 12

3) On the Dues Renewal Reminder screen (see Figure 13), the From and Sender Email fields will be pre-populated with your information based you are logged in to the Infinite Connection. Edit these fields if required.

4) Edit the default email text by adding your personalization and the date the current dues expire. Do not delete the link information to your Dues Payment Form.

5) Click Send. The confirmation screen will indicate the number of recipients. The recipient email addresses will not appear in the email header.

Dues Renewal Reminder

5 lapsed members found with email addresses.

From
Sender Email
Subject
Message Text

We've missed you! Consider renewing your membership in Club of SmarTrans as our fiscal year ends! Visit https://alumni.mit.edu/smartrans/dues-login?groupID=149

Send

Figure 13

SmarTrans™ Leader Guide, p. 12
**Donations (for separately incorporated groups only)**

*This feature is only available to groups that are separately incorporated non-profits.* If this applies to your group, forward the appropriate documentation to smartranshelp@mit.edu and the feature will be turned on. If activated, it allows your group to collect donations either with or separate of a Dues payment.

**Add A Donation**

1) On the Dues Management screen (Figure 14), click on the Add/Modify a Donation link.

![Dues Renewal Reminder](image)

*Use the system to survey your members or collect valuable feedback from them when they pay dues.*

**Add/Modify Survey Questions**

*Collect donations from your members when they pay dues or any time during the year.*

![Add/Modify a Donation](image)

*Your dues collection form is located at https://alum.mit.edu/smarTrans/dues-login.vm?groupId=149*

Figure 14

2) On the Add a Donation screen (Figure 15), type in the name of the fund or donation recipient in the Name of Fund or Recipient field.

3) Include a descriptive paragraph about what the donation or fund pays for (such as scholarships for minority undergrads, supplement to group overhead, etc.).

4) Modify or add to the default text about your group's Donation Crediting Policy. If no goods are exchanged (such as a dinner or other item), the donation is deductible within the limitations of federal income tax laws.

If your group does not intend to send out additional donation documentation, indicate this in the Donation Crediting Policy field and encourage donors to print the receipt screen for their records. They will additionally receive an emailed receipt.

5) Click **Continue**.

6) If no modifications are needed, click **Save Donation** to activate.
Modify a Donation

On the Dues Management screen, click on the Add/Modify a Donation link (Figure 14).

1) Select the Donation you wish to modify and click on the right.
2) Edit the text in one of the three fields and click to re-activate.
3) If no additional modifications are needed, click to re-activate.

Note: on this screen, you also have the option to or a previously created Donation.
Dues Reports

SmarTrans™ offers the following useful Dues reports for Group officers (Figure 16):

1. **SmarTrans™ Dues Payment History Report**
   - View a list of all members who have paid through SmarTrans™.

2. **Member Dues History Look Up**
   - View the history of all Dues payments for an individual member.

3. **Lapsed Members Contact List**
   - View the contact information for all lapsed group members.

4. **Donation Report**
   - View donations made to the group.

**To View and Download the Report:**

Reports are available online and in downloadable form.

- From Dues Management page, click on the Dues Reports link in the right menu bar.
- Click on SmarTrans™ Dues Payment History Report (Figure 16). Using the drop down boxes across the top of the screen, select the time period for which you wish to show your group’s Dues. Hit **Go**. Information is sorted by Last name (alpha); then most recent Dues terms; and then alpha by Dues type.

- Should you wish to download this report, click on **Download Report**.
- Downloaded reports will be in Ascii format, comma delimited. To use the data, you must first save it as a file to your hard drive. On a PC, right click on the report link with your mouse and choose "Save Target As...". On a Mac, click on the report link, pull down the "File" menu, choose "Save as..." Once you name the file and save it to your hard drive, you can open it in Excel.

Note: the downloadable version of this report includes the email address for each individual and answers to the Survey Questions.

2. **Member Dues History Look Up** - a tool to look up the Dues history for a single member by name.

Note: the report will show Dues paid through SmarTrans™ and from the Alumni Association database. If your group has regularly provided membership data to the Association, it will appear here. Data from the database may show year and Dues type, but not Dues amount. Dues paid via SmarTrans™ will show the amount paid.
To Look Up a Member’s Dues Payment History:
Step 1) From Dues Management, click on the Dues Reports link in the right menu bar.

2) Click on Member Dues History Look Up link (Figure 16). On this simple screen, you can look up the history of single member by name. Enter the member’s Last and/or First Name, and then click the Go button (Figure 17).

3) Click the name of the member on the next page, you will be able to view this member’s dues payment history.

This report sorts by Dues term end date only.

Note: the downloadable version of this report includes the name of the individual, the group Dues were paid to, the term, type, amount and date Dues were paid.

3. Lapsed Members Contact List – shows most recent Dues paid for all past members who still live in the group area.

Step 1) From Dues Management, click on the Dues Reports link in the right menu.

2) Click on Lapsed Member Contact List (Figure 16). This report shows all previous members of your group who have not paid in the current Dues term and still live in your group area. The list loads in alphabetical order by last name with the most recently paid Dues information for the individual member. A total appears at the top of the page which is the aggregate of all pages of lapsed members.

Note: listings with Dues information but no Dues amount are from the Alumni Association database. The individual paid Dues for that year but the amount, not processed through SmarTrans™, will show if information was provided to us. All amounts processed through SmarTrans™ will appear.

3) To download the complete data, click on Download Report and follow the instructions.

Note: the downloadable version of the report contains contact information about each past member to be used in an email or mail membership reminder, including address, email address, and phone number.
4. **Dues Donation Report** - shows all of the donations made to a group's fund(s). *This report is visible if Donations have been turned “on” (the group is a separately incorporated non-profit).*

Step 1) From the Dues Management, click the Dues Reports link in the right menu.

2) Click on Dues Donation Report (Figure 16). This report shows all donations made to the fund(s) created by the group. It includes the individual donor name, fund name, amount and date paid. The report is filterable by date.

3) To download the complete data, click on [Download Report] and follow the instructions. Note: the downloadable version of the report contains contact information for the donor, including address, email address, and phone number.
Event Management
SmarTrans™ allows groups to collect online credit card payments and registrations for events. By creating an event, you will be creating an online registration form which can be added as a link on your group's Web site or sent in a broadcast email to your members.

If you have members who are uncomfortable paying online and would prefer to send a check or credit card information by mail, your event planner can enter their registrations in and process credit card payments through SmarTrans™. See the section on Register Attendees Offline on page 37.

Along with registrations, the SmarTrans™ event template includes a survey function through which you can collect feedback and preference data from your participants.

Create an Event
Step 1) To create an event, click on the Events Management link in the center of your group’s SmarTrans home page (Figure 18) or the Events Management link in the right menu bar. It will bring up a page that allows you to view existing events for your group, modify or expire an existing event, or create a new event.

2) Click on either in the center of the screen or the Create an Event link in the right menu bar.

3) This action will bring up a new screen, the Event Registration Form, which provides detailed information about the components of creating an event (Figure 19).
4) Enter the *Event Contact* information in the top section (Figure 19), including the name of contact person for the event, his or her phone number, email, and/or any additional information a possible registrant would want to know about the person (such as: available times to contact with questions). The *Additional Information* box can also be used for a second event planner’s contact information.

The *Receive Registration Email* check box should be checked if the event planner(s) would like to be bcc’d on each registrant’s confirmation email message every time when someone registers for the event. **This box is defaulted to unchecked.**

If there are officers in addition to the event planner who would like to receive the registration emails, check the *Receive Registration Email* box and enter their email addresses in the *Additional Recipients of Registration Emails* box.

5) Enter the specific details about the event and date/time of the event in the Event Information section in the center of the screen (Figure 20). Include the name of the event and event description (such as names of speakers, description of program).

Note: do not use quotation marks (" ") around the event name. Event name cannot be longer than 55 characters.
Event Information

6) HTML code can be used in Event Description box. Links to other Web pages and "mailto" links can be used here. Specifically, an anchor tag (<a>) may be used with the "href" attribute. The value for that attribute must start with "http://", "https://", or "mailto:". The closing anchor tag (<a>) is also needed. Examples of acceptable links include:

- <a href="http://alum.mit.edu">The MIT Alumni Association</a>
- <a href="https://www.amazon.com">Amazon.com</a>
- <a href="mailto:jdoe@alum.mit.edu">email Jane Doe</a>

7) Enter date and time. The time fields are not required. This will allow you to use SmarTrans™ for a multiple day/time event.

8) Enter a Capacity for the event. How many people can your event space accommodate? Note: Capacity is not a required field, but, if used, the system will close registrations when capacity is reached. You can modify capacity after an event has been published and change the capacity number to any number greater than the total number of registrations received.
9) Set *Capacity Warning*. Officers can set a number in the *Capacity Warning* box (Figure 20) indicating when they want to receive an email warning message with respect to the number of registrants. When the pre-determined capacity number to receive the warning message has been reached, the system will automatically send a warming message to the event contact(s).

10) Enter your group’s cancellation policy. Even though this field is optional, it’s important to indicate your event cancellation policy here because **SmarTrans™ does not process refunds. If your group offers refunds for events, your group has to manually cut a check to refund the customer.**

11) Enter the details about the event location, include the building name and address (Figure 21).

12) Enter the **Publish Start Date** and **Publish End Date**. When do you want the registration form to be available? When do you want to stop?

Note: the **Publish Start Date** defaults to today's date. If you do not change the date before your registration form is saved, the event will publish immediately. Some fields will not be available for modification but may be hidden. It’s strongly recommended that you select a day later than today’s date as the publish start date so that when the form is saved, it won’t get published right away and you will be able to edit each field, or delete the event if you’ve changed your plans.

Note: The **Publish End Date** can be set on any date between the publish start date and the event date, or the same day as the event date or one day after the event date. The event form will expire at 12:00 midnight EST on the publish end date.

13) Under the **Miscellaneous Options** section, make three choices related to your customers or members (see Figure 21).

- Check the box next to **Show Attendee List** if you wish to give participants the option to view all other registrants. The registrant is given the option to opt out of including his/her name in this list. Once this feature is turned on, you won’t be able to turn it off.
- Check the box next to **Add Work Info** if you wish to have the registrant to provide his/her company name and his/her job title in the company.
- Check the box next to **Email Reminder** if you wish to have an auto-generated email reminder sent from the SmarTrans™ system to all registrants two days before the event date. An open text box is provided to customize your message. Recipient email addresses do not appear in the email header of reminder emails.

Click to save the information for this step.
Event Location

Location

* Street

* City

State/Province/Zip

* Country

Publishing Information

Publishing start date is when this form is published online and available for registration. Put it available. The publish date is defaulted to today's date. If it is not modified, your event will be published on the first available date.

* Publish Start Date
  
  * December
  * January

* Publish End Date
  
  * 8
  * 8

Miscellaneous Options

Show Attendee List?

- Display names of registered attendees who opt in. Once it is turned on, it cannot be turned off.

Add Work Info?

- Display company name and title fields to the registrant.

Email Reminder?

- Send an automated email to registrants 2 days before event date.

Maximum 1000 characters. This field does not allow HTML tags.

Continue  Cancel

Figure 21
14) Enter ticket types. If there is more than one ticket price for your event, use the pre-populated Ticket Types or type over them (except for the default Member authentication ticket type) with categories appropriate to your event. Check the check boxes in front of the types in order to activate them. Include a price in the price column (no dollar sign) (Figure 22). Each time you click on Add More Lines button, the system will add ten lines/options (up to 40).
Note: if you have multiple meal options, but wish to make your registration form simple, you can use the Ticket Types to collect meal/registration information at the same time (such as: Member/Chicken, Non-member/Chicken ticket types).

If your event is free, create a Ticket Type called “Attend” or some other generic term and put a zero in the price column.

- **Member authentication ticket type:** SmarTrans™ provides a default member ticket type and it should be used if membership validation is required in order for the member price to be offered on your event registration form. Officers can activate the default member ticket by checking the box next to it (see Figure 22). After the member authentication ticket has been activated, when the end-users have logged in to register, only the current members will be able to see the member ticket price in addition to all other ticket types. In order for member-validation to be successful, it is important for clubs and groups to submit their offline membership information to Marilyn Finlay (mfinlay@mit.edu) in the Association in a timely manner.

Note: Groups can offer a regular member ticket price and not utilize the member authentication ticket type. This member ticket type will be displayed to all users. A sample of a regular member ticket type can be “Member” or “Club Member”, etc. You should not use the same name format as for the membership authentication ticket type (e.g. Member, Club of Boston).

- **Ticket Limit** should be used if you would like to control the number of a particular ticket type for your event (for instance, you may want to limit the number of reduced-price tickets for young alumni or retiree or make more tickets available to alumni/member than non-members). Ticket limit field can be modified after the event is published. It can be deleted or changed to any number greater than the total number of tickets already sold for that particular ticket type.

- **Limit per registration** may be set if you would like to control the number of a specific Ticket Type each registrant can purchase. End user will receive an error message if he or she attempts to buy more tickets in a particular Ticket Type than set by the officer (see Figure 22).

- **Date-activated tickets** feature should be used if you would like to publish a specific ticket type on a date later than the event publish start date. By using this feature, the officer can set the active and inactive date of a ticket type (Figure 23). When it reaches the active date of a ticket type, the ticket will be shown on the registration form; when it reaches the inactive date, the ticket will be hidden from the registration form. This feature is helpful if groups want to sell an “early-bird” or “late-registrant” ticket type.
Note: If you don’t set up the active or inactive date for a ticket type, by default, the system will use the event publish start date as the ticket’s active date and the publish end date as the inactive date. After the registration form gets published, you will be able to modify the active or inactive date of a ticket type if the date is later than today’s date.

Click **Save Ticket Types** to move to the next step.

15) The *Event Summary* screen will show you a summary of everything you have entered so far for your event (Figure 24). If your event is a simple event, you can click **Save Form** and complete the registration form.

If your event has meal options, or a second component to the ticket (see steps 16-18 below for types of components), or if you wish to collect survey information from your registrants, continue to step 19.
Add a Ticket Option. If you wish to add a component to one or all of your Ticket Types, click the Add Option link next to the Ticket Type. For example, if only members are given the option of being invited to a pre-dinner cocktail party, this would be an add-on question or ticket option (see Figure 25).

Clicking on Add Option link next to a ticket type, the next screen will allow for a question or phrase and give up to ten possible answers for the registrant to choose from (see Figure 26).
### Ticket Types

<table>
<thead>
<tr>
<th>Ticket Type</th>
<th>Price</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alumnus</td>
<td>$20.00</td>
<td>add option</td>
</tr>
<tr>
<td>Young Alumnus</td>
<td>$15.00</td>
<td>add option</td>
</tr>
<tr>
<td>Current Student</td>
<td>$10.00</td>
<td>add option</td>
</tr>
<tr>
<td>Member, Club of SmarTrans</td>
<td>$15.00</td>
<td>add option</td>
</tr>
<tr>
<td>Friend</td>
<td>$20.00</td>
<td>Total 50 tickets available</td>
</tr>
</tbody>
</table>

#### Figure 25

---

### Add Add-On Option

Enter a question and 2 or more answers below. Answers will be listed as radio buttons - registrants will add on question.

If answers will incur an additional cost, it can be indicated, and registrants will be billed accordingly; the number of times an option may be selected, enter the limit, and the option will be displayed but not Additional Costs and Limits are optional.

**Type of Ticket:** Alumnus, $20.00

<table>
<thead>
<tr>
<th>Question</th>
<th>Additional Cost</th>
<th>Limit</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Answer 1</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Answer 2</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Figure 26

Note: if you choose to **Cancel** in the middle of adding an option, SmarTrans™ will take you back to the Summary page and the saved event.

17) **Add a Meal Option.** Click on **Add Meal Option** on the top or bottom right of the summary form (Figure 24). The form has been pre-populated with several options. You may use any of these options or type over them. Remember to check the box next to the meal choices you have selected.
Is there an extra price for one meal option? Include the additional price in the price column (such as: Filet Mignon $5 extra). Click on the lower left to save.

Note: if you choose to in the middle of adding an option, SmarTrans™ will take you back to the Summary page and the saved event.

Add an Event Option. Event option is an activity related to the event that may carry a separate registration and/or additional price. An unlimited number of event options can be added to an event. As described on page 39 in the section on Creating a Complex or Multi-day Event, event option can be utilized to include multiple components of an event/conference/weekend/reunion, etc.

Your event option and responses should not be longer than 200 characters each and you should not use quotation (“ ”) marks. Examples from group events are the privilege of seating at the Speaker's Table or joining him/her for a private pre-event cocktail party. If it is related to a specific ticket type, it is added in Step 16 above. If it is a stand-alone add-on to which all are invited, click on the top or bottom right.

When clicking on, the screen asks for a question or phrase and gives up to ten possible answer boxes to complete. When completed and saved, it takes you back to the summary page (Figure 27). You can add as many event options as needed.

Note: if you choose to in the middle of adding an option, SmarTrans™ will take you back to the Summary page and the saved event.

<table>
<thead>
<tr>
<th>Meal Type</th>
<th>Modify</th>
<th>Hide</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beef:</td>
<td>$0.00</td>
<td>add</td>
</tr>
<tr>
<td>Chicken:</td>
<td>$0.00</td>
<td>add</td>
</tr>
<tr>
<td>Vegetarian:</td>
<td>$0.00</td>
<td>add</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Event Option 1</th>
<th>Modify</th>
<th>Hide</th>
</tr>
</thead>
<tbody>
<tr>
<td>Would you like to buy the reunion T-shirt?</td>
<td>$15.00</td>
<td>add</td>
</tr>
</tbody>
</table>

Figure 27
19) **Add Survey Option.** SmarTrans™ enables you to collect information and feedback from your constituents with each registration through the use of survey questions. By clicking on **Add Survey Question** on the top right, you can add a question each time, with up to 10 possible answers (Figure 28). The answers can take the form of radio buttons (only one response), check boxes, or open text fields. Your survey questions and responses should not be longer than 200 characters each and you should not use quotation (“ ”) marks.

- An example of a yes/no (radio button) question is Have you ever before attended a group event?
- For multiple choice (check box) questions, an example is What types of events would you like to see the group do? Answer: family, educational, travel, sports, etc.
- An open text question requires the end user/registration to provide feedback to a question such as Please tell us what you thought about the speaker from the Embassy Lecture.

You have the option to make the question mandatory (Figure 28). If you check the box, the primary registrant will not be able to check out until all asterisked survey questions have been answered.

Note: Mandatory survey questions do not apply to guest registrations or to registrations completed by the officer using *Register Attendees* or *Post-Event Registration* link. After it’s saved, there will be an asterisk shown in front of the mandatory question (Figure 29).

Click **Save Survey Question** to save it.
ADD/MODIFY SURVEY QUESTION

Survey Question

Add survey questions to your registration form if you'd like to gather some type of information from your registrants.

Survey Question:

Tell us what types of events you'd like to attend.

Maximum 200 characters. Do not use quotation marks (").

☐ Radio Button

Answer Type:

☐ Check Box

☐ Text

Answer 1: Cultural
Answer 2: Educational
Answer 3: Family
Answer 4: Career
Answer 5: Travel
Answer 6: Sports
Answer 7:
Answer 8:
Answer 9:
Answer 10:
Make this question mandatory: ☐

Save Survey Question  Cancel

Figure 28
20) After you have saved the survey question, you may wish to modify. Click the “Modify” next to the question (Figure 29) and change all fields at any time. You may also delete to eliminate the survey question entirely if the form hasn’t been published yet or the question after the form has already been published.

21) After all additions and edits have been made to the event, click on Save Form in the lower left corner. If you did not use today’s date as your publish date, all information in the Event registration form just created is available for modification prior to publish. If your event publish date was the day of creation and you wish to make changes, see Modify an Event below for more information.

Note: all publish dates start/stop at midnight EST.

22) When the event is saved, the system will present the URL for your registration form on the Event Management page. It appears on the Event Management or Event List page, below the bolded title of the event (Figure 30).

After the event has been published, if your group has a Web site, this link can be placed on your site after your promotional information about the event. If your group does not have a site, you can automate registration by sending the URL link in an email.

For SmarTrans™ users with Alumni Site Builder (ASB) sites, when a new event is created, the officer designated as the primary contact for the group in ASB will be bcc’d on the event creation confirmation email message.
This feature will keep group officers informed about upcoming events and allow them to update their ASB event page information on a timely basis.

23) **Special Feature: Email RSVP Report to Event Planner(s)**
For each SmarTrans event, the system will automatically send an email to event contact(s) with an attached RSVP report in Excel format on the following dates: event date less than 14 days; event date less than 5 days; event date less than 1 day; and day of the event.

**Preview an Event**
Step 1) To Preview an Event registration form as it will appear to the end user/registrant, go to the *Events Management* page for your group (Figure 30) and click on the *Preview* link below the event name. You will be presented with the registration form in a format similar to how it will appear for the end-user.

2) The Event cannot be modified from this view.

**Modify an Event**
Step 1) To modify an event that has been created but not published, go to the *Events Management* page for your group (Figure 30) and click on the *View/Modify* link below the event name.

2) Each section of the event registration form is modified by clicking on *Modify* on the top right side of the applicable section. You may delete a section as well as modify it.

At the bottom of the section being modified or deleted, click *Save Option* to save changes. When you have returned to the full form, *Go Back* will take you back to the *Events Management* page for your group.

Note: as when the event was being created, you are presented with the option to or as well as edit the existing information.

3) To modify an Event that has published, go to the *Events Management* page for your group and click on the *View/Modify* link below the event name.

4) When the *View an Event* screen is presented, choose the section of the form you would like to *Modify*.

Note: Publish start date cannot be modified.
Text in the following fields can be added to or hidden, but not modified:
Existing Ticket Types
Existing Event Options
Existing Meal Options
Existing Survey Questions
The order in which Ticket Types, Event Options, and Survey Questions can be modified if there’re more than one Ticket Type, Event Option and Survey Option created.

Note: If you hide a ticket type, an event option or a meal option and then create one with the exact same name, you will have two entries of this option in all reports. Example: Hide ticket type Non-member with price $75 and create Non-member with price $70. Two non-member ticket types will appear in your reports.

**Reorder Ticket Types**

You may re-arrange the order of the ticket types, by clicking on [Reorder Tickets] at the top or bottom of the summary form (Figure 24). Type a number in the text box next to each ticket type to reflect the new order you desire (Figure 31). Click [Save Form] when complete. The [Reorder Tickets] button displays when two or more ticket types have been created.

![Figure 31]
**Reorder Event Options**
You may re-arrange the order of the event options, by clicking on **Reorder Event Options** at the bottom of the summary form (Figure 32). The button displays when two or more event options have been created. Type a number in the text box next to each event option to reflect the new order you desire. Click **Save Form** when complete.

![Figure 32](image)

**Reorder Survey Questions**
You may re-arrange the order of the survey questions, by clicking on **Reorder Survey Questions** at the bottom of the form (Figure 32). Type a number in the text box next to each survey question to reflect the new order you desire (Figure 33). Click **Save Form** when complete. The **Reorder Survey Questions** button displays when two or more survey questions have been created.

**Re-order All Survey Questions**
Place a number in each of the boxes below to re-order the Survey Questions.

<table>
<thead>
<tr>
<th>Survey Question</th>
<th>Question Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Tell us how you liked the reunion last year.</td>
<td>1</td>
</tr>
<tr>
<td>2. Would like to organize an event for the club next year?</td>
<td>2</td>
</tr>
</tbody>
</table>

![Figure 33](image)
**Expire an Event**

Step 1) To *expire an event* and discontinue registration, go to the *Events Management* page, locate the event, and click on the *expire* link below the event name (Figure 34).

You will be asked to confirm that you do want to expire the event. Click *expire* to complete the task.

**Clone an Event**

Step 1) To clone an event and modify it as a new one, go to the *Events Management* page, locate your event, and click on the *Clone* link below the event name (Figure 34).

2) The next screen will be the *Create an Event* form with the previous event’s data populating the fields. Modify all fields as needed for the new event. Remember to change the event date, publish start, and stop dates.

3) Save revisions in each section.

**Add/Update Registration Note**

Officers can add a note to an existing registration for published or expired events. By using the *Add Registration Note* feature, they can record information received from registrants who have already submitted their online registration information.

Notes might include cancellations, meal or event options change, or any specific requests. **All information entered into the Add a Note field will be included in the downloaded RSVP report.**

1) Click on *Add/Update Registration Note* link (Figure 35) and a Registration List will be provided.

2) Click on the registrant name that you want to add/update a note to his/her existing registration form (Figure 36).
3) Enter the note in the *Registration Note* box (Figure 37) and then click [Modify](#) to save the change.

*Registration Summary*

- **Event Name**: 2009 Club Reunion
- **Registrant**: Marry Warren
- **Email**: ndzheng@mit.edu
- **Registration Date**: 2008-12-09
- **Total Attendees**: 1

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Badge Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Warren</td>
<td>Marry</td>
<td>Nora</td>
</tr>
</tbody>
</table>

**Affiliation**: Other

**Address**: Alumni Association
600 Memorial Drive W98-2nd Fl
Cambridge MA 02139
United States

*Type of Ticket*: Current Student

*Update Registration Note*

Maximum 1000 characters.

[Modify] [Cancel]
Register Attendees Offline
If you have received registrations and payments by mail, email, fax or phone, you can integrate this information into the SmarTrans™ reports and records for your event.

1) From Events Management page, click on the Register Attendees link below a particular event listing (Figure 38).

![Image of Event Management page with Register Attendees link highlighted]

2) The screen displays a Registrant Look-Up form (see Figure 39). You can use this form to search by attendee name, or name in combination with middle initial and/or class year. The last name is required.

![Image of Registrant Look-Up form]

3) Choose the correct name from the results by clicking on the first or last name and the attendee’s contact information will pre-populate the registration form.
4) You can also skip the look-up option and go to the registration form directly by clicking on the registration form link on the top of the look-up page (see Figure 39) and fill out the required information manually.

5) Select the Ticket Type and any Meal Choices or Event Options the individual requested.

6) Click Checkout to move to the payment information screen. You will be asked to accept or modify the information you have entered and/or add a guest. Follow the same steps if adding a guest.

7) Choose the payment method:
   - By Check – you will enter the payee name, check number, and check date for your records.
     
     Note: this information is for your information only. It will appear in the Revenue Report but SmarTrans™ does not process payments by check or cash. Checks or cash received should be deposited into the group’s bank account. The event officers should get in touch with their treasurers regarding all the deposit related issues.
   - By Credit Card – you will enter the billing address and credit card information as any other online payment screen. The transaction on your registrant's credit card will take place in real time.
   - By Cash – check the radio button and go to the confirm screen.

The final screen will be an online receipt. If you used the registrant's email address when entering his/her personal information, a registration receipt will be emailed to the email address you entered.

Post-Event Registration
The event planner has the opportunity to add late and day-of registrations by using the Post-Event Registrations function. This option is a link under the event title and URL that will appear when the event has expired (Figure 40).

<table>
<thead>
<tr>
<th>Event</th>
<th>Publish Date</th>
<th>Event Date</th>
<th>Status</th>
<th>Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nuclear Power Plants in New England?</td>
<td>02/03/2008</td>
<td>02/29/2008</td>
<td>EXPIRED</td>
<td></td>
</tr>
</tbody>
</table>

https://alum.mit.edu/smarTrans/register-login.vm?eventID=19961&groupId=202

View | Clone | Add/Update Registration Note | Post-Event Registration

Post-Event Registration works exactly like Register Attendees. The link is called Register Attendees when the status of an event registration is “Published” and changed to “Post-Event Registration” when the
status of an event changed to “Expired.” Once the link has been clicked, a look-up form is presented for the officer or administrator to search. Follow instructions above.

**Create a Complex or Multi-day Event**

SmarTrans™ allows you to create a simple single-priced or free event or a complex event. A complex event can be multi-day or it can involve simultaneous ticketed or pre-registered sub-events.

1) To create an event, click on the *Events Management* link in the center of your group’s administrative home page or the *Events Management* link in the right tool bar. Click on [Create a New Event] in the middle left of the screen or in the right menu bar.

2) Fill in the *Event Information* (contact, date the event begins), and primary location as you would for a simple event.

3) If your event has multiple sessions per day, the best way to set it up is to create simple *Ticket Types* and use the *Event Option* component for the sub-events. Since Event Options can carry their own price, you can use the Ticket Types to charge the registration fee for the event and then drill down by using Event Options.

   Note: the end-user can only select one Ticket Type per individual registration (one for each guest), but may select as many Event Options as you offer (one per Event Option).

4) Create Ticket Types and save them. Under each *Ticket Type*, you can use *Add Event Option* to create each of the time slots (with multiple options in each) in your schedule. In our example, we’ve created a Early Bird Registration Fee and a Late Registration Fee as our Ticket Types. Below that, we have a lunch (with meal choice and fee), and event options. The afternoon could be scheduled similarly. Each of the time blocks is created as a single *Event Option*. See Figure 41 for the result.
Note: it should take you less than thirty minutes to create a multiple-day event such as our example indicates. However, because the system will time out if you are inactive for more than thirty minutes, save your work in segments (remembering to change the publish date from today) and modify later to prevent lost data.
Events Reports
On the Events Management page is a running list of all events for which a group has used SmarTrans™ for registration. The list presents with the most recent five events in descending order by most recent Event Date.

There are two ways to see all events from a particular group:

- To see the list in the same default sort order (most recent Event Date first), scroll down to the bottom of the Events Management page and click View All Events link. This screen provides a historical list of all events your group has posted in the SmarTrans™ system. The full list can be sorted alphabetically by Event Name or numerically by Publish Date or Event Date. Each list is sorted by clicking the underlined column header.

- In the right toolbar under Events Management, click on Event List. This will present the entire list as described above. From this view, the full list can be sorted alphabetically by Event Name or numerically by Publish Date or Event Date. Each list is sorted by clicking the underlined column header.

SmarTrans™ offers four useful Events Reports for each individual event and two global reports for officer planning and review purposes. You may retrieve a report either by clicking on the Reports icon to the right side of a particular event listing on your group’s Event Management page (Figure 42) or by clicking on the Events Reports link under Events Management in the right menu bar.

The Event-specific reports are as follows (Figure 43):

- **RSVP Report** – this report provides information about the attendees for a specific event, including their meal selection, answers to survey questions, middle initial, salutation, company name and title and registration note entered by event planner(s).

- **Badge Name Report** – this report is designed to be downloaded into word processing software which creates templated labels (formatted for your badge stock).

- **Registrant Summary Report** – this report provides ticket and revenue information for a specific event.

- **Registrant Receipt Report** – this report provides a one-page per registration view of an individual registration (including guests). This report is downloadable in PDF format and requires Acrobat Reader to view.
The Group-specific reports are as follows (Figure 44):
Clicking on the Events Reports link under Events Management in the right menu bar takes you to the Event and attendee history report page.

- **Event History Report** – this report provides a snapshot of your group’s events attendance records for events in SmarTrans™.

- **Attendee History Report** – this report shows all of the attendees and events for a specific, filtered period of time.

**Event Reports**

- **Event History Report**
  A list of all your groups' events with attendance figures.

- **Attendee History Report**
  A list of all your groups' attendees.

**View and Download Reports**
Reports are available online and in downloadable form.

**RSVP Report**

1) Click on the page logo under Reports next to your event name on the Event Management page (Figure 42)

2) Click on RSVP Report link on the next page (Figure 43). Fields shown on the screen are registrant name, attendee name, amount paid, ticket type, meal type, affiliation and class year. The report is sortable on both the attendee and registrant names by clicking on the hyperlinked header at the top of the column you wish to sort.

2) Should you wish to download this report, click on and follow the instructions on the next page to pull the text into a spreadsheet.

Note: the downloadable version of this report might contain significant information not shown on screen, depending upon the complexity of your event. This report captures all registrant contact information, ticket type, meal type, event option, survey responses for registrants and guests, middle initial, salutation, company name and title, and text from Additional Comments box,
**Badge Name Report**

Step 1) Click on *Name Badge Report* (Figure 43). This report pulls data to create name badges with the full name of the attendee, first name, and suffix (graduation year), middle initial, salutation if any, and company and title. If your registrant logged in to the Infinite Connection, course and year will be pre-populated. If not, data will be based on registrant input and possibly inconsistent.

2) To create badges, click on [Download Report](#) and follow the instructions on the next page. You will need to configure a label page in your word processing document based on the specifications of your badge stock. The most common brand is Avery. All of the instructions for formatting the page are on the Avery box.

**Registrant Summary Report**

Step 1) Click on *Registrant Summary Report* (Figure 43). This report is a quick view of tickets sold and revenue collected through SmarTrans™ for a particular event. Fields shown are registrant name (sortable), number of tickets per registrant, and total paid per registrant.

2) Should you wish to download this report, click on [Download Report](#) and follow the instructions on the next page.

Note: the downloadable version of this report contains information not shown on screen, depending upon the number of guests in each party. This report captures the total tickets purchased in each Ticket Type category, the registrant’s contact information, and date paid.

**Registrant Receipt Report**

Step 1) Click on *Registrant Receipt Report* (Figure 43). This report provides a one-page per registration view of an individual registration (including guests). This report is downloadable in PDF format and requires Acrobat Reader to view. Data in the report include name, address, MIT affiliation and registration selections for the primary registrant and for each guest individually, the total paid and date paid.

Note: This report also includes the group’s cancellation policy and is a useful report if mailings to registrants are a part of the event planning process.

**Event History Report**

Step 1) Click on the *Events Reports* link under Events Management in the right tool bar.

2) Click on *Event History Report* (magenta link on top before the event list begins) (Figure 44). This report is available for specific dates by using the drop down filters at the top of the screen, but defaults to all of your group’s SmarTrans™ events in publish date order.
Both the event name column and the event date are sortable. The report also includes the capacity for the event and the number of tickets sold.

3) Should you wish to download this report, click on the Download Report button and follow the instructions on the next page to pull the info into a spreadsheet.

The downloadable version of the report will retain date filtering as shown on the previous screen.

Attendee History Report
Step 1) Click on the Events Reports link under Events Management in the right tool bar.

2) Click on Attendee History Report (second magenta link before the event list begins) (Figure 44). This report is available for specific dates by using the drop down filters at the top of the screen, but defaults to all of your group’s SmarTrans™ events in publish date order. All three columns are sortable (attendee name, event name and event date).

3) Should you wish to download this report, click on the Download Report button and follow the instructions on the page to pull the info into a spreadsheet.

The downloadable version of the report will retain date filtering as shown on the screen.
Revenue Report
Reports are available online and in downloadable form.

The Revenue Report in SmarTrans™ (Figure 45) was created to allow your group to view transactions to date or for a specific period for Dues, Donations, Events, or all. So that your group can plan, we have included the 2.5% transaction fee in the report so that you can predict payments from the Association.

Step 1) From any main page in the group’s SmarTrans™ administrator screens, click on the Revenue Report link at the bottom (Figure 45) or from the right menu bar.

2) Utilize the drop down boxes to select the time period you want to display. Utilize the drop down boxes to select All, Events Only, or Dues and Donations Only (Figure 46). Click GO.

3) On next screen, the report shows the date, type (Event/Dues/Donation) of transactions, amount paid, the transaction fee (2.5% credit card processing fee collected by the credit card company), and the type of payment (Credit Card/Check/Cash). See Figure 47.
4) Since this report provides the above-mentioned filters the columns do not sort. Should you wish to download this report and manipulate the data, click on [Download Report] and follow the instructions on the page to pull the text into a spreadsheet.

Note: the downloadable version of this report contains more granular information than available on screen. For Dues, it will include the member name, Dues type, and Dues amount. For Donations, it will include the Fund name(s), donation amount and date paid. For events, it includes the event name, registrant name, transaction date, and ticket total for the registrant's order. It also includes email/contact information, class year, and phone number for the registrant.

The downloadable version of the report will retain date filtering as shown on the screen.

5) A summary of the revenue report for a selected period of transactions is also displayed on the top of the page (Figure 48). Club or group treasurers can use the “Net to User Group” information to verify if it matches the amount on the reimbursement check or wire transfer received for that period for your group. If they don’t match, email smartranshelp@mit.edu and we look into it.
Revenue Report

Total Credit Card Transactions: $5,848.00
Total Credit Card Transaction Fees: $146.53
Total Cash and Check Transactions: $260.00
Total Transactions: $6,108.00
Total Credit Card Refunds: $20.00
Not To User Group: $5,681.47

The total shown reflects the total transactions for type of transaction(s) and time period selected.

The downloadable version of this Revenue Report contains data not included in the online view and includes the event name, dues type or fund name, and the registrant’s name, class year, email...
End-User Experience

Pay Dues and/or Make a Donation
SmarTrans™ processes Dues payments and donations online for alumni with Infinite Connection accounts. Donations will only appear on Dues forms for groups that are separately incorporated non-profits and have the Donations feature turned “on.” When a Dues payment link is clicked (either from a group’s website or sent via email), the alumnus is presented with a login screen (Figure 49). If the alum has an account and logs in, he/she will be taken through a short pre-populated screen (Figure 50 below) in which he/she will select the Dues type he wants to pay, make a Donation (can be done separate of a Dues payment), verify his billing address, and input credit card information.

Note: non-alumni or alumni without an Infinite Connection account will follow the process described on page 50 in the Request to Pay Dues section.

Pay Dues
Alumni and others who have an Infinite Connection account should log in here to pay dues.

Login Name:

Password:

Login and Pay Dues

If you don't have an Infinite Connection account you can register then pay dues.

Infinite Connection Registration

REQUEST TO PAY DUES
You can send an email to the VP of Membership to let them know you prefer to pay by check or cash. The group will contact you shortly.

Figure 49
To make a donation, the alumnus simply types the amount of the gift into the text box next to the fund name (Figure 51).
Request to Pay Dues
When an end-user clicks on the Dues link for your user group, he/she will get a login prompt from
the Infinite Connection. SmarTrans™ requires that anyone who wishes to pay Dues or Make a
Donation must have an Infinite Connection account. Should the individual not have an account
(whether he/she is not an alumnus or just chooses not to have an Infinite Connection account),
he/she can click on the “Send an email” link under Request to Pay Dues to send in a request
(Figure 52).

The dues payment request form allows the person to indicate the Dues Type and asks for
information about an alumnus the person might be affiliated with (Figure 53).
When completed, the form generates an email to the Membership Officer on record for the group. The transaction is then conducted “offline.”

Note: When the dues payment received offline, the membership officer need to send in the member’s name, type, payment amount, and term information to Marilyn Finlay (mfinlay@mit.edu) in the Alumni office. Once these dues info has been entered into the database, it will appear in the Member Dues History Look Up report.
Register for an Event

The process of registering for a free event or paying for event tickets is similar to the Pay Dues process. When clicking on the event registration link, the registrant will see a login page where he/she can choose to get a pre-populated form (by logging in) or get a blank form (without logging in) that will have to be completed as the registration is processed.

If the registrant logs in, he will follow these steps:

1) Below his pre-populated name is the option to opt out of and also to view the Attendee List, if this feature is set by the event planner.
   - The attendee list feature is defaulted to “opt in.” The registrant must check the box next to Hide My Name in order to opt out.
   - By clicking on the red hyperlink View Attendee List, the registrant may look at an alphabetical list of all registrants who have not opted out. He will also see the total number of registrants signed up for the event (number includes those opting out of showing their name). It is shown in a pop-up window so the registration process is not interrupted (see Figure 54).

![Club of New York][1]

**ATTENDEE LIST**

Total Number of Registered Attendees: 3

Below is the list of people who are willing to share their names.

<table>
<thead>
<tr>
<th>Attendee</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jeff Harrington</td>
</tr>
<tr>
<td>Cheese Martin</td>
</tr>
<tr>
<td>Joe Smith</td>
</tr>
</tbody>
</table>

[Continue Window to Continue Registration](#)

Figure 54

2) Scroll down to the middle of the page to the Ticket Type section and choose one type for himself. Additionally, complete any Meal Option, Event Option or Survey Questions presented.

3) At the bottom of the registration screen, the registrant will click [Continue](#) (Figure 55).
4) The registrant can modify the existing registration, check out (input credit card information) or add a guest. To register a guest, the registrant clicks **Add Guest** before checking out (see Figure 56).
5) The primary registrant will then enter the name, badge name and mailing address information (or check a box indicating that the guest has the same address) and continue with selections for Ticket Type, Meal Type and Survey Questions for the guest.

6) An unlimited number of guest registrations can be processed in this manner unless a limit per registration has been set by the event planner.

7) When all are added, click and input credit card information.

If the registrant does not log in, he will not get a pre-populated form and will need to complete his name and address information in addition to following all of the steps above.
Your Information
The end user can view his/her transactions history in SmarTrans™ by logging into the Infinite Connection and then go to “My Account” page. Under dues and payment, click on the “View” link (Figure 57). An individual can always see his or her most up-to-date membership and event registration history via this method (Figure 58).

![Figure 57](image)

Your Transactions

<table>
<thead>
<tr>
<th>Dues Transactions</th>
</tr>
</thead>
<tbody>
<tr>
<td>There are no entries in the report.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Event Transactions</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Group</td>
</tr>
<tr>
<td>Club of SmarTrans</td>
</tr>
<tr>
<td>Club of SmarTrans</td>
</tr>
<tr>
<td>Club of SmarTrans</td>
</tr>
<tr>
<td>MIT10 Alumni</td>
</tr>
</tbody>
</table>

Events payment information is provided only for events that used the MIT Alumni Association online registration system.

![Figure 58](image)
Refunds
SmarTrans™ does not process refunds or registration modification. This policy is clearly indicated on all payment pages for the end user/registrant/member. For many groups, this will not be an issue since they already have "no refund" policies. For those groups who do allow refunds, manual provisions will need to be made on the part of the group treasurer or finance officer.

Data Collection
Event attendance data is collected so that groups can plan and execute events and activities that will best meet the needs of the local alumni, and so that Alumni Association programs and services can be enhanced to meet those needs. Most data will be viewed in the aggregate to assist the Association staff in determining attendance trends and program planning.

Reimbursements to Groups/User Groups
On the 15th and 30th of each month, the finance department of the Alumni Association will process reimbursement checks or wire transfers for groups with activity in a prior 15 day period. For checks/wire transfers processed on the 15th, activity will be from the 16th to 31st of the prior month. For checks/wire transfers on the 30th, activity will be from the 1st to 15th of the current month.

Wire Transfer Payments
Clubs/groups that have a domestic bank account can set up wire transfers through Bank of America (the Institute vendor). The wire transfer service does not carry an additional cost to the group, unless your bank charges a fee.

To sign up for the wire transfer service, the club/group must take the following steps:
2) Click on Enroll in the right column and complete the online application for an account using your group's bank information. If your group is not separately incorporated and you need to use the MIT's Federal Identification number, please contact smartranshelp@mit.edu to obtain this information.
3) Email the SmarTrans™ Help Desk at smartranshelp@mit.edu and let us know when you have signed up.

Step 3 is very important because if you forget to inform us, we won’t be able to follow up and have your group set up for this service.

As soon as the bank verifies your information, we will be able to create an internal vendor number and set things up for funds to be transferred. It takes a few days to get the customer number from the bank and a vendor number from MIT's accounting office, so your first transfer may take up to three weeks after you complete the application.

After the wire transfer service has been activated, since there is no check involved, you will not receive any paper reports any more from our office. The same information we mail out with the check is available in SmarTrans™ by using the Revenue Report, filtering it for the applicable dates, and downloading. The downloadable version of the report has the detail we send by mail (customer name, event name or dues type, date paid, amount, etc.).
**SmarTrans™ Privacy Policy**
The MIT Alumni Association is committed to preserving the privacy of MIT alumni. SmarTrans™ is a secure area of the Association website where alumni, students, and friends can purchase tickets or register for events and where alumni can pay membership Dues for groups and classes. The following policy explains our information gathering and dissemination practices.

**Information we receive from you**
When you register for an event using the SmarTrans™ application, our registration form requires you to give us certain information such as your name, email address, phone number, and address. We also gather the information you provide about guests such as name, address, and affiliation to provide you with a specific service (such as name badges or meal preferences at the event). If you are an alumnus and choose to login via the Infinite Connection, you will be served with a pre-populated registration or payment form through which you can update your personal information in with the Alumni Association.

**How we use your data**
MIT staff or a user group officer may use your data to contact you regarding the use of the application or about a transaction processed on our site. We may also use the data to send you information about the activities, programs, and services of the Alumni Association or about the Institute. You may choose to stop receiving specific types of materials or information from us via either an opt-out link in an email or by contacting us directly with your preferences.

For event participants who do not login to the Infinite Connection, data is stored in Alumni Association systems and accessible only to event planners of the particular event, the officers of the group to which Dues are paid or registrations made, and to MIT staff.

The information stored on this site will not be used for any commercial or philanthropic purpose not directly connected with the Massachusetts Institute of Technology and the MIT Alumni Association; nor will copies be made for anyone outside of MIT staff and authorized MIT alumni volunteer groups.

**How does the MIT Alumni Association safeguard your information in SmarTrans™?**
This site has industry-standard security measures in place to protect the loss, misuse, and alteration of the information under our control. We make every effort to store the information collected through SmarTrans™ in a secure operating environment that is not available to the public.

By providing you with this policy statement, the MIT Alumni Association is pledging our continued commitment to protecting the information you provide us.

SmarTrans™ automatically encrypts all personal information including your credit card data in transit from your desktop to our systems. Your credit card number is not stored once the transaction is complete. It is used only to process the current transaction. During processing, we use card authorization and fraud-screening services to verify the information you provide.

Neither MIT nor the MIT Alumni Association shall be liable for any direct or indirect, special incidental, or consequential losses or damage arising out of the use or misuse of this site or the contents of any message sent by or to site users.
We are committed to providing you with a safe online experience. The software we use for processing credit card payments employs secure encryption technology (SSL) to reduce the possibility of theft, manipulation, and other alteration of any information that you provide to us.

Cookies
Cookies are used to store active login sessions to allow visitors to move between the public and the secure areas without repeated logins. Cookies are also used to gather aggregate data about web page hits that help us measure web page performance.

In case of errors or questions
In case of errors or questions about the amount charged to your credit card for a transaction processed via SmarTrans™, send email to: smartranshelp@mit.edu. Or you may call 617-452-2500. If you call or email, please provide or be prepared to provide:
- User group to which you made the payment
- Date of the transaction
- Name of the event or Dues you paid for
- Description and amount of suspected error

In case of questions about the application or to report bugs, please contact SmarTrans™ Help at: smartranshelp@mit.edu or 617-452-2500. Please provide:
- Full description of the issue, question, or suspected bug
- Description of what activity you were doing when the issue occurred
- Browser and hardware information
- User group in which the problem occurred

Changes to this policy
This policy may change from time to time. If we make any substantive changes to the policy with regard to how we use your information, we will notify all alumni users via the Tech Connection email newsletter. Your continued use of this application after the changes are posted constitutes your agreement to the changes with regard to information collected in the past and in the future from you.

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