Learning The Contacts Section

Within the “Contacts” section, you’ll find 5 tabs titled: Groups, Leaders, Members, Individuals, and Contact Master List. Each of these tabs holds relevant information to both your contact management and event facilitation. Read about each tab below.

GROUPS

Within the “Groups” section, you’ll find all of the groups that have registered for a trip. You can see the group’s name, event and number of both reserved and registered participants. If you need to manually change some of the group’s information, simply click on the “Edit” link and you’ll find all of the groups name and registration details.

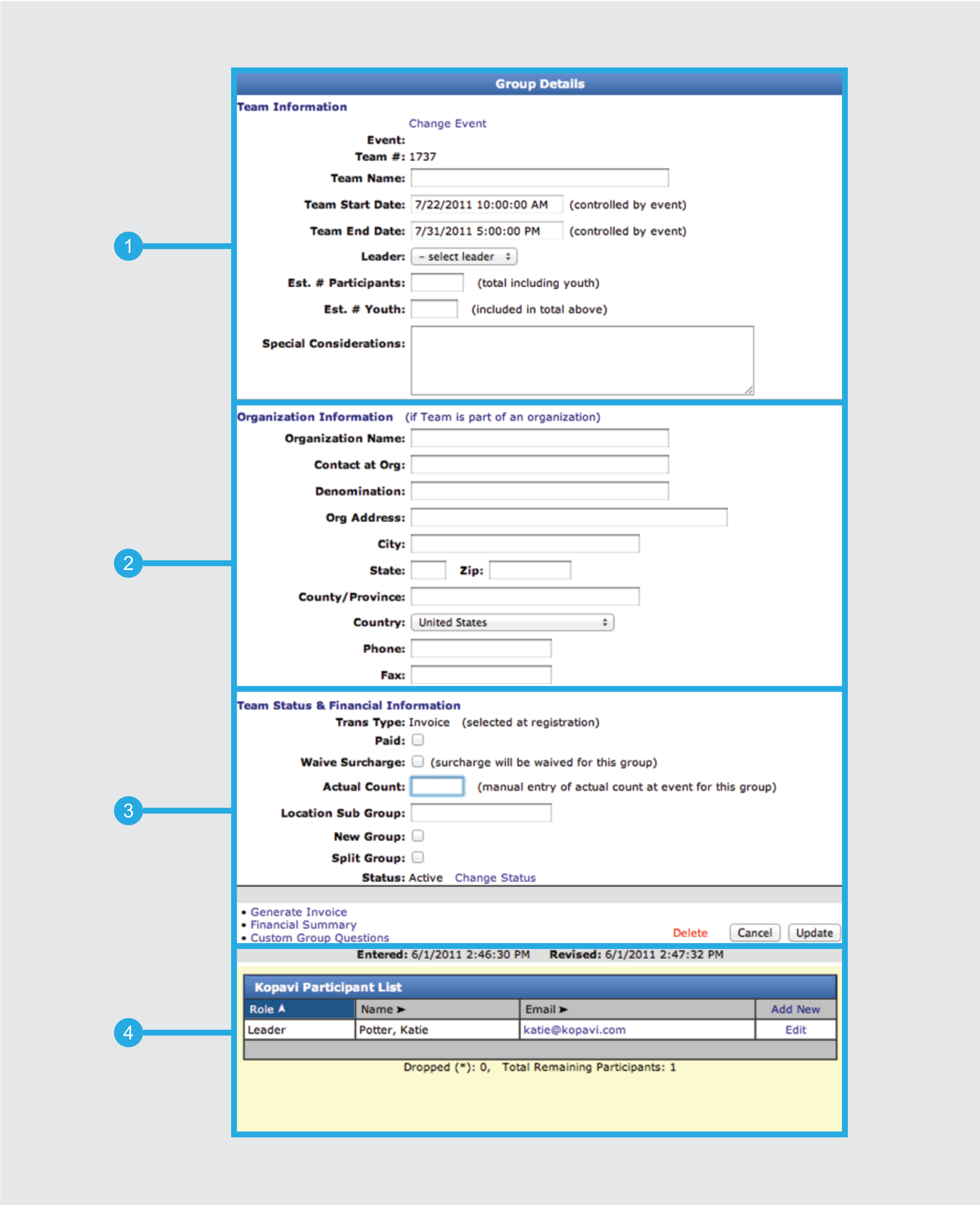
Group Details (See Image on next page)

1. **Group Information** – Edit the group name, start and end dates, team leader and the estimated number of participants. You can also insert special notes and considerations about the group for future access.

2. **Organization Information** – If the group is apart of a larger organization, you can record the organization details, including: Name, contact information, address and phone numbers.

3. **Group Status & Financial Information** – View the financial summary of your group, generate an invoice and change the group status between active, dropped, and archived. (NOTE: For information and use of custom functions such as “Actual Count,” “Location Sub Group,” “New Group” and “Split Group” contact Skycog™.)

4. **Participant List** – See all of the group members, their role on the team and their emails. You can also change their information by clicking the “Edit” link next to their name.


Group Details
Team Information
Change Event
Event:
Team #: 1737
Team Name:
Team Start Date: 7/22/2011 10:00:00 AM (controlled by event)
Team End Date: 7/31/2011 5:00:00 PM (controlled by event)
Leader: - select leader
Est. # Participants: (total including youth)
Est. # Youth: (included in total above)
Special Considerations:
Organization Information (if Team is part of an organization)
Organization Name:
Contact at Org:
Denomination:
Org Address:
City:
State: Zip:
County/Province:
Country: United States
Phone:
Fax:
Team Status & Financial Information
Trans Type: Invoice (selected at registration)
Paid:
Waive Surcharge: (surcharge will be waived for this group)
Actual Count: (manual entry of actual count at event for this group)
Location Sub Group:
New Group:
Split Group:
Status: Active Change Status
• Generate Invoice
• Financial Summary
• Custom Group Questions
Delete
Cancel
Update
Entered: 6/1/2011 2:46:30 PM Revised: 6/1/2011 2:47:32 PM
Kopavi Participant List
Role
Name
Email
Add New
Leader
Potter, Katie
katie@kopavi.com
Edit
Dropped (*): 0, Total Remaining Participants: 1
1
2
3
4

Group Reports

Group reports allow you to have quick access to a groups most pertinent information. By clicking on the “Reports” link you’re immediately directed to a contact list of all the group’s members.

WEST VIRGINIA
WV2 WK4 6/30/2013 3:00:00 PM
Group 1799 Team 2

Contact List | Member Status | Financial Summary

Team Member	Phone	Email
Abrams, Kyle		kyle-abrams@ikle.org
Cristoff, Julie		jcristoff12@network.org
Crow, Katie	123.123.1234	katie@kopavi.com
Norway, Josh		norwayj@network.org
Richard, Susan		susanr@ghk.net
Todo, Sarah	987-654-321	gregm@kopavi.com
Williams, John	345-562-3865	katie@kopavi.com
		Total Participants: 7

[print] • close [X]

By selecting “Contact List” you can view all the group members, their phone numbers, and their email addresses.

WEST VIRGINIA
WV2 WK4 6/30/2013 3:00:00 PM
Group 1799 Team 2

Contact List | Member Status | Financial Summary

Team Member	Passport	Medical	Waiver	Gender	Age
Abrams, Kyle				M	No DOB
Cristoff, Julie				F	No DOB
Crow, Katie				F	Adult
Norway, Josh				M	No DOB
Richard, Susan				F	No DOB
Todo, Sarah				F	Adult
Williams, John				F	Adult
					Total Participants: 7

[print] • close [X]

If you click on “Member Status” you can see a break down of each group member’s information. It’s easy to who has filled out their passport, medical and waiver information and get a quick look at the average age and gender of the group.

WEST VIRGINIA
WV2 WK4 6/30/2013 3:00:00 PM
Group 1799 Team 2

Contact List | Member Status | Financial Summary

REGISTRATION FINANCIAL SUMMARY

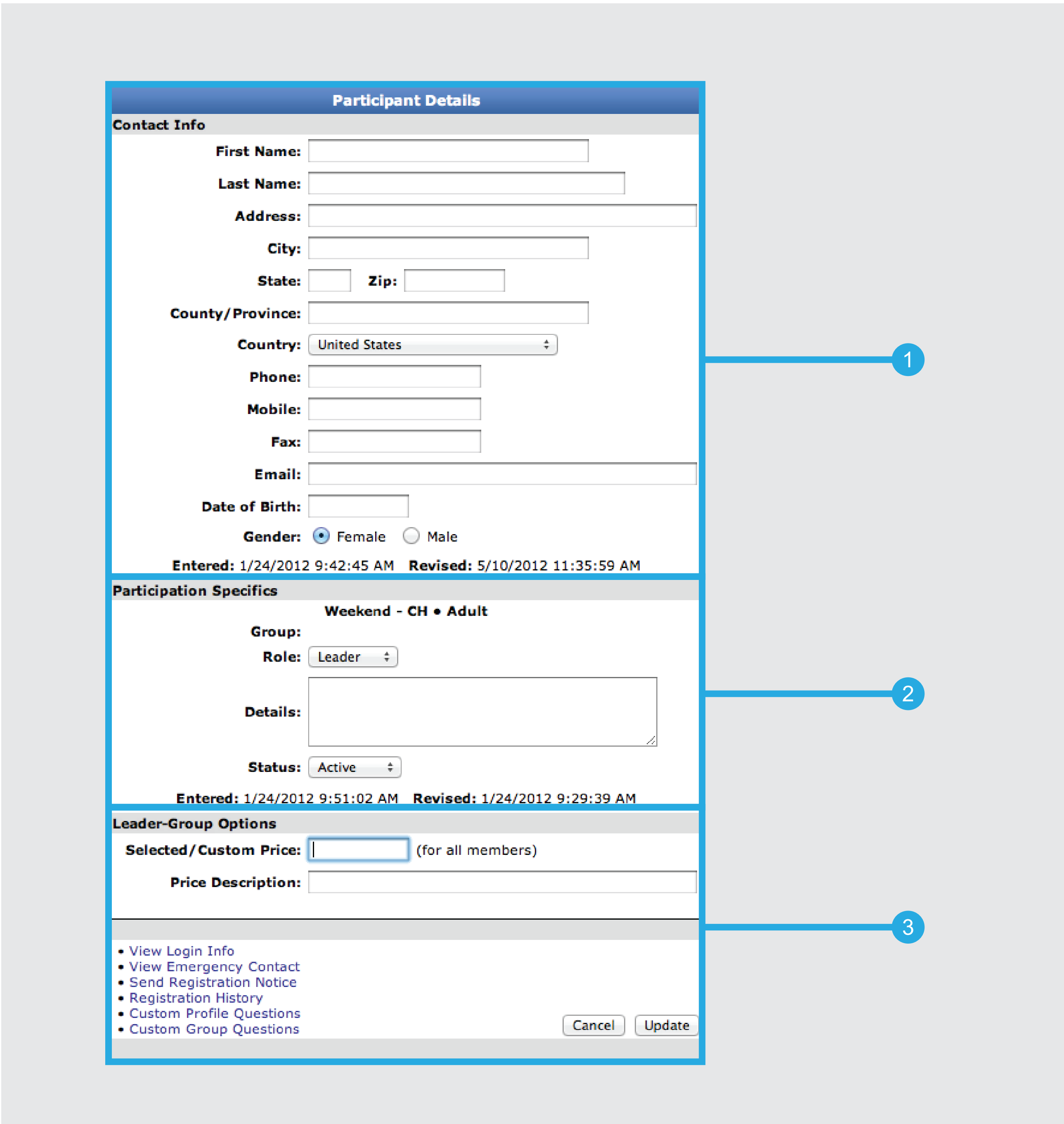
Group Registration fee:	25.00
Price/Person for 10 x 600.00:	6,000.00
Total Trip Cost:	**6,025.00**
Deposit (10 x 0.00):	0.00
Payments Received:	-25.00
Remaining Balance:	6,000.00

Date	Description	Amount
Wilson, David ()		
8/2/2012	Payment	$25.00
Total for Wilson, David		**$25.00**
Sum of Transaction History:		**$25.00**

By selecting the “Financial Summary” tab you can take a quick look at the group’s financial information, including their total trip cost, deposits, payments and the remaining balance.

LEADERS

The Leaders section allows you to see all of the leaders you have registered. It displays their names, group names, event names and email addresses. If you need to change some of the leader's information, click on the "Edit" link to display their participant details (See Participation Details below).



Participation Details (See image on previous page)

Within the Participant Details, you can see all of the individual's contact information, personal information, group affiliation, and role within their specific event. You can write notes about the participant, view their login information, and even send a registration notice. (When editing a leader's details, you can also record a custom price for their trip. This custom price will be applied to all of the group's members.)

1. Update the participants personal, location and contact information.

2. Select the participant's group, select their role, change their status and record any specific notes for them.

3. Set a custom price and description (Leaders only), view their login information, registration history, emergency contacts and send a registration notice.

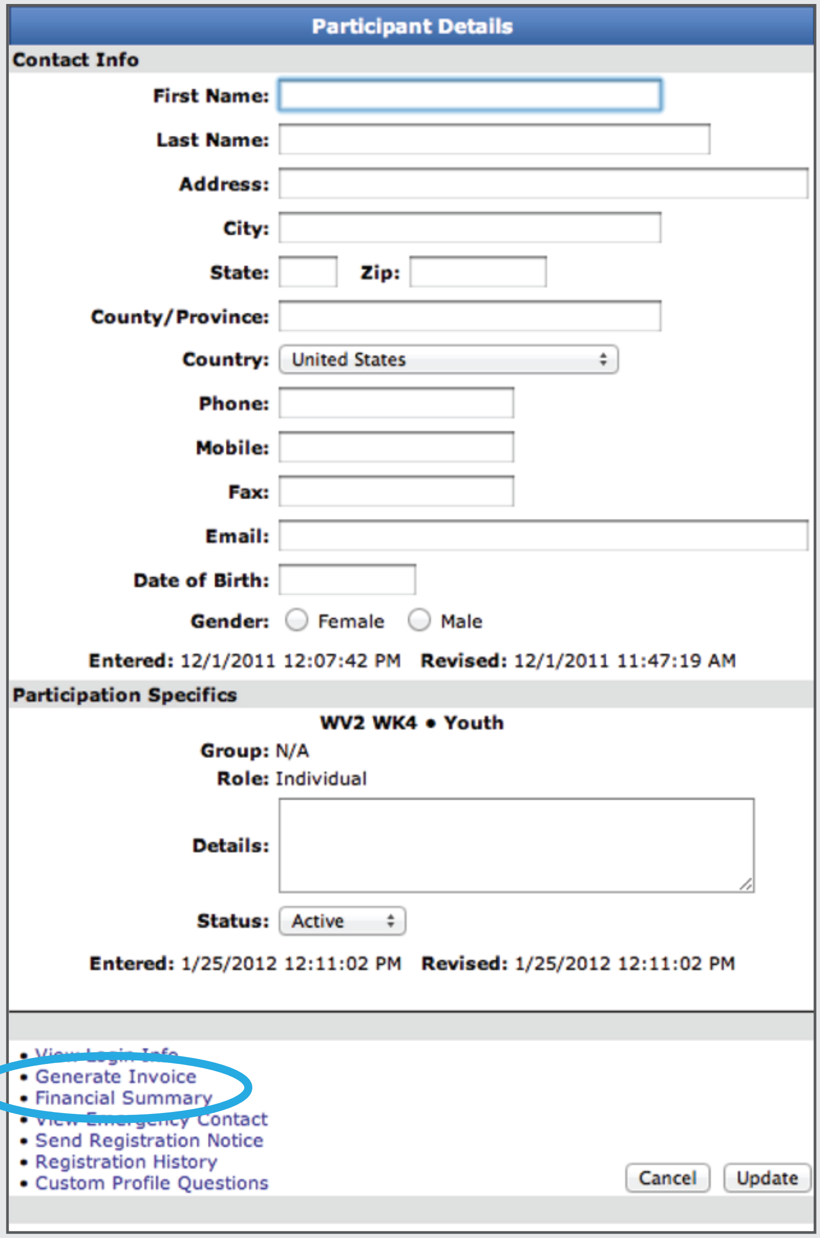
MEMBERS

The Members section is very similar to the Leaders section. You can quickly sift through all of your currently registered group members and view their participant details by clicking on the "Edit" Link (See Participant Details on previous page). You can also delete any members who have dropped from the program.

INDIVIDUALS

Similar to the Leaders section, the Individuals table displays each registered individual in tandem with their event and email. By clicking "Edit" you can also change their participation details. But because Individuals are not tied to a larger group (where you would normally check financial information), you will find their financial information as a part of their participation details (See Image on next page).

INDIVIDUAL PARTICIPATION DETAILS


Participant Details

Contact Info

First Name:
Last Name:
Address:
City:
State: **Zip:**
County/Province:
Country: United States
Phone:
Mobile:
Fax:
Email:
Date of Birth:
Gender: Female Male

Entered: 12/1/2011 12:07:42 PM **Revised:** 12/1/2011 11:47:19 AM

Participation Specifics

WV2 WK4 • Youth
Group: N/A
Role: Individual
Details:
Status: Active

Entered: 1/25/2012 12:11:02 PM **Revised:** 1/25/2012 12:11:02 PM

- View Login Info
- Generate Invoice
- Financial Summary
- View Emergency Contact
- Send Registration Notice
- Registration History
- Custom Profile Questions

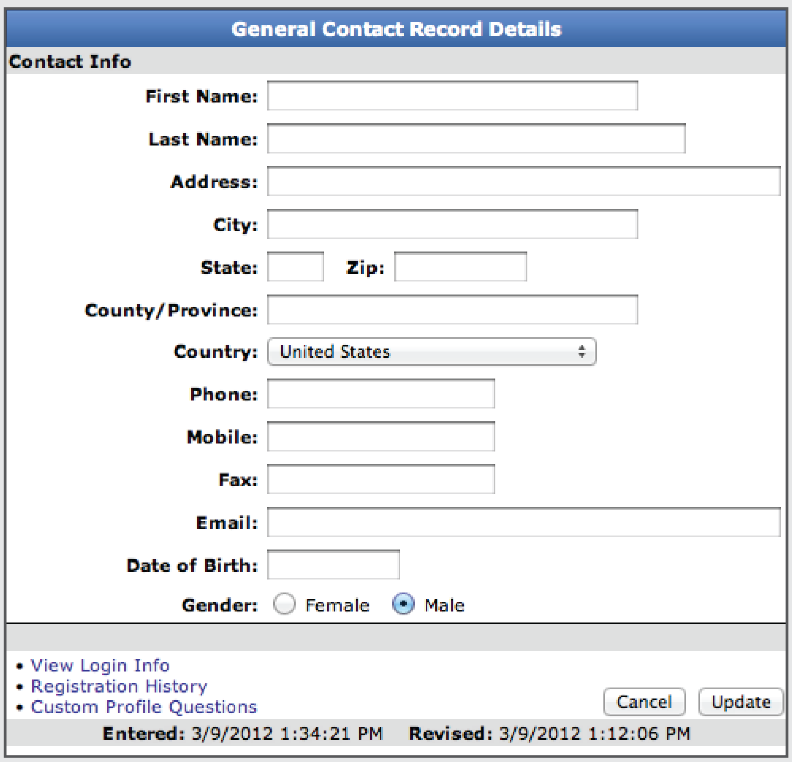
Cancel Update

* Generate Invoice & Financial Summary

CONTACT MASTER LIST

The Contact Master list is like your phone book. From the initial prompt you can search for a contact by their name or location. Once within the table, you can see a list of all of your current and prior registrants along with their email, City, and State. If you want to see further information on these contacts, you click on the "Edit" link to find a more detailed contact record (See below).

GENERAL CONTACT RECORD DETAILS



General Contact Record Details

Contact Info

First Name:
Last Name:
Address:
City:
State: **Zip:**
County/Province:
Country: United States
Phone:
Mobile:
Fax:
Email:
Date of Birth:
Gender: Female Male

- View Login Info
- Registration History
- Custom Profile Questions

Cancel Update

Entered: 3/9/2012 1:34:21 PM **Revised:** 3/9/2012 1:12:06 PM