I. **Getting started:** Camp Manager makes a request to Community Outreach for access to the CircuiTree sites.

a. **CT6** site, where events are managed: [https://app.circuitree.com/TAMUS/](https://app.circuitree.com/TAMUS/)
   i. User names in CT6 are always formatted as follows: tamus.first initial of first name full last name, all lowercase, such as John Smith would be tamus.jsmith
   ii. An initial username and password will be sent by e-mail, requesting the user to change the password

![CT6 Site](https://example.com)

b. **Registration** Site:
   i. [https://events.circuitree.com/TAMUCC](https://events.circuitree.com/TAMUCC)
   ii. Username will be @tamucc.edu email address
   iii. Use the same password as CT6

![Registration Site](https://example.com)

c. **Compliance** Application:
   [https://events.circuitree.com/TAMUCC/Account/Login?ReturnUrl=%2FTAMUS%2FForm%2FQualifyingQuestions%2F](https://events.circuitree.com/TAMUCC/Account/Login?ReturnUrl=%2FTAMUS%2FForm%2FQualifyingQuestions%2F)
   i. Same username and password as registration site

![Compliance Site](https://example.com)
d. Overview of CircuiTree software: [https://support.circuitree.com/getting-started/](https://support.circuitree.com/getting-started/)

II. **Compliance Application**: the camp manager will begin camp application process by logging in to the Compliance Application at [https://events.circuitree.com/TAMUCC/Account/Login?ReturnUrl=%2FTAMUS%2FForm%2FQualifyingQuestions%2F](https://events.circuitree.com/TAMUCC/Account/Login?ReturnUrl=%2FTAMUS%2FForm%2FQualifyingQuestions%2F)

a. Sign in with @tamucc.edu email address (or work address if not TAMU-CC)
b. Choose “Create New Application”
c. Choose “TAMUCC CPM Application” from dropdown on “Form”
d. Name of Program—the camp name as determined by the department. This is important and needs to be consistent throughout forms.
e. Choose the department from the Organization drop-down
f. Continue to go through tabs to complete, and submit Compliance application

g. The Compliance application will route to approvers

III. **Setting up Registration pages**. Each individual camp (as defined by different dates or camper restrictions) will be set up as a separate event. Camps can be copied, pasted, and changed, or a new page can be created. Outreach will assist with initial setup and camp manager can edit thereafter. The information needed to set up initial page is as follows:

a. Camp Name (as used in the Compliance packet)
b. Responsible Department
c. Camp Dates
d. Age/grade/gender restrictions

e. Cost, deposit, refund information, discounts

f. Camp specific questions (school, t-shirt size, position, instrument, etc.). This includes any special terms and conditions, expectations or other information needed with registration process.

g. Any required forms other than Waiver, Indemnification, and Medical Treatment Authorization Form (TAMUS required). An example would be Talent Release

h. Additional items offered (such as parking permit, concert CD, transportation, etc) and cost for items.

IV. Viewing Registration Pages:

a. Camp Managers can view event pages by logging on to the CT6 site
   i. Click on 3 black bars in upper left
   ii. Click on Configuration gear box
   iii. Click on Registration
   iv. Click on Events under Event Configuration
   v. Choose year and Cost Center from drop downs, Click Find
   vi. Click on pencil to the right of the camp chosen to view. There are more details in the categories in the dark grey panel to the left. *Note: changes made will affect the registration pages.

V. PayFlow Pro: Departments must set up PayFlow Pro by Paypal for camps. It is recommended that camp managers work with their department businessperson for the set-up of these accounts. It is the decision of the department as to whether programs share these accounts or have individual ones.

a. If no PayFlow account exists to use for the camps, contact Accounting Services to obtain a Merchant ID.

b. Accounting Services will link the Merchant ID with PayFlow Pro (the system that processes the credit card payments) and will provide the camp representative with a user ID to access the PayFlow Pro system. All users must take PCI training (available on traintraq) prior to being issued access to PayFlow Pro.

c. After the department has completed the PayFlow Pro account setup, contact Community Outreach to attach CircuiTree to the specific PayFlow account.

d. After operations have begun,
   i. Both CircuiTree and PayFlow fees will be charged to the departmental account on a monthly basis. (see V. below)
   ii. Camp representative will submit credit card deposits to Accounting Services on a daily basis. For more information on credit card processing, please access the TAMUCC Cash Handling Procedures, which can be accessed on
VI. **Active Link** for Department/Directors to use for opening registration:
   a. After events are set up, PayFlow Pro is attached, and compliance is fully routed, the camp manager can request that the event pages be opened for registration. This should be in an e-mail to Joseph Miller, Director, Community Outreach.
   b. Once approved, the page will be made public and a link will be sent to the camp manager for distribution by the camp manager.

VII. **Understanding registrations**:
   a. Part of the event setup is the allotted maximum number of registrations allowed
   b. A registration is Pending until payment is completed. Once the maximum number has been reached, the system does not allow pending registrations to go through the payment process.
   c. After the payment is made, the registration is considered Completed
   d. After the maximum number has been reached, a waitlist option is the default. See VII. b for waitlist information.
   e. NOTE that when testing registrations, it is recommended that the testing stop before the payment step. If the registration goes through the payment process (of any amount) a CircuiTree fee is charged.

VIII. **Managing registrations** for camp managers:
   a. Login to the CT6 site
      i. Click on 3 bars in green upper left
      ii. Click on Manage→Registration→Registration search (in upper left white bar)
      iii. Choose a search criteria such as organization or event→Find
b. Wait list:
   i. Once your registration capacity has been met, a wait list will be generated. These applicants will not complete their registration but will be told they are on the Wait list. If a spot opens, they must be manually moved from waitlisted to a pending registration.
   ii. To see a list of wait listed applicants: Main menu→Reports→Criteria (in grey column. May need to open black arrow)→Category dropdown choose Registration. Type Waitlist in white bar.
   iii. Click on View→fill in criteria for correct event. The report will show waiting list in order.
iv. To move registrants from waitlist to active, search for registrations as in VIII above. Search for the registrant, click View to see full registration of a participant. To activate, click the blue button Waiting List and choose Activate.

![Waiting List Menu]

v. The department will need a process to keep up with changing the status of the Wait List applications.

c. ** Cancelling and refunding** a paid registration

   i. Manage→General→Registration Search

   1. Enter Year, Select Location, Select Event, Click Find
   2. You will see the list of registrations. The balance on the camper’s account will show on the far right. If the balance is $0.00, they have paid in full.
   3. Click the view button (far right) on the camper
   4. Click accounting on the left dark column to see the payments made
   5. Click Actions in the upper right
   6. Click Cancel to cancel the registration
   7. Click Issue Refund to refund back to the credit card used to pay.

IX. **Costs** for CircuiTree and PayFlow Pro:

   a. Each registration that is completed through CircuiTree is charged a $3.65 fee. These fees will be charged to the FAMIS account assigned at the outset.
   b. The fees for the credit cards are a combination of percentages and flat fees, but a reasonable estimate is 2.3% of credit card amounts.
   c. Both fees may vary slightly based on camp activity volume.

X. **Camp Insurance** will be deducted from allocated account as an IDT (Inter-Departmental Transfer). Insurance rates are dependent on the type of camp. For more detailed rate information, please contact Joe Miller at 825-5967.
XI. Report Menu Options:
   a. Reports – Generates PDF files of the data specified.
      Ex: Attendee information generates a page per attendee with registration details.
   b. Queries – Generates a table of data.
      i. You can search for a particular attendee or piece of data using the search bar at the top of the screen.
      ii. To sort click column name once for ascending, will appear; twice for descending . To filter by a column, click .
      iii. The columns in your on-screen view can be customized by clicking the button on the top right side of your screen.
      iv. Sorts by a particular column – select column from a list.
      v. Group data by a particular piece of data (Name, Grade, Gender, Enrollment type, etc.)
      vi. Export all data in an excel file. Note: If you have customized your columns in the window, those changes will not apply to your downloaded report. Downloaded version may include additional columns.
   c. Common Queries:
      i. Attendee Information – Lists general information regarding all attendees.
         Name, enrollment status, age, grade, DOB, email, billing info, parent info.
      ii. Attendee Information Attributes – lists general attendee name + any additional questions asked during the registration process (t-shirt size, school attending, etc.)
      iii. Registration Accounting Summary – Includes name, registration status, charges, discounts applied, payments, billing info, account # (cc type and last 4 digits), Payment Type (Cash – Credit Card – Check), Transaction Date, processed date, transaction number, GL Batch ID, Entered By (if value in the field is Tamut Web, that means online registration).
   d. Formatting Exported Excel Files: To quickly narrow down an exported excel file to the columns you want to see:
      i. Open your downloaded file. Click on the Data Tab, then “From Table” in the Get & Transform Section:
ii. A prompt will come up to format your data as a table. Be sure the “My table has headers box is checked and click OK:

![Excel Table]

iii. A new “Power Query Editor” window will open. Select the **Choose Columns** option on the menu ribbon, the **Choose Columns**.

![Power Query Editor]

iv. Select the columns you would like to see, then click **OK**:
v. Close the Power Query Editor Window. Choose **Keep** when this message occurs:

```
Power Query Editor
Do you want to keep your changes?
```

vi. The selected columns will appear on a second tab in the Excel document you downloaded, automatically formatted so that you can sort and filter the data.

e. **CircuiTree support** for Reports and Queries:
   
   https://support.circuitree.com/knowledgebase/how-do-i-run-a-report-or-query/