

Automatic Event Waitlisting

You can now set Certain to automatically process waitlisted registrations for your event.

Before: You could set a maximum Registration Capacity for an event, and when registrations reached that number the registration form(s) would close so that nobody could register.

But now: If you set an event Registration Capacity you can have registrants automatically waitlist for the event when it's full. If spaces become available, waitlisted registrants are then registered automatically (by a background process that runs once a minute).

To use this feature: set the event's **Registration Capacity** and enable **Automatic Event Waitlisting** for it, configure a few settings for the event, and then add a **Waitlist** section to each form.

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Summary of Steps

These steps are explained in detail below. See also the [Important Notes](#) at the end of this guide.

In the **event**:

- Set a registration capacity ([Step 1](#))
- Set up an email template ([Step 2](#))
- Switch on automatic waitlisting ([Step 3](#))

In the **form(s)**:

- Configure an Event Waitlist section for the form ([Step 4](#))
- Allow the form to remain open when capacity is reached ([Step 5](#))
- Add an Event Waitlist section to the form sequence ([Step 5](#))

Once any registrants have joined the waitlist, you can view the [Waitlist Queue](#).

Event

1. Set the event registration capacity.

- a. Go to **Plan > Event Setup > Details**.
- b. Set the **Registration Capacity**: the maximum number of attendees at the event.

2. Set up an email template

Do this so that the registrant can receive an automatic email if they are registered by being moved off the waitlist automatically; see step 3d below.

Note: As explained under Step 3, you may skip this step if a Registration Status Logic Rule will send an email anyway.

- a. Go to **Promote > Communication > Email Templates**.
- b. Create a new email template with appropriate wording of your choice.

3. Switch on automatic waitlisting

- a. Go to **Plan > Configure > Options**.
- b. Under '**Automatic Event Waitlisting**', select **Enable Event Waitlist Automation**.
(This is disabled unless you've completed step 1.)
The following three additional fields (c, d, e) are displayed:
- c. **Waitlist Status** – (*Required*) Select the Registration Status to be applied to a registrant who joins the event waitlist.
This can be:
 - a **standard** status such as 'Waitlist Hold'
 - or a **custom** status (created in Plan > Event Setup > Custom Statuses)The only statuses available in both cases are those categorized as "Pending".

The next two fields are under the heading '**Upon acceptance from waitlist:**'

- d. **Update Reg Status** – (*Required*) Select the Registration Status to be applied to a registrant who is moved off the waitlist by the automatic process and is therefore allowed to attend the event.
- e. **Send Email** – Select the email template to be sent to a registrant when the automatic process moves them off the waitlist. This is the email you selected in step 2b.

Note:

- This is optional because if the **Update Reg Status** you selected in the previous step (3d) is a custom status configured with a Logic Rule to email a registrant when they get that status, then selecting an email template here would mean accepted registrants would receive two emails.
- Otherwise, we strongly recommend selecting an email template here. If you don't, then an accepted registrant might never learn about their registration becoming successful.

Forms

In each form in which you want registrants to join the waitlist if event capacity is reached:

4. Configure the Event Waitlist form section

- a. Go to **Plan > Forms > (form) > Event Waitlist**
- b. Edit the **Header Text** as required. The default is “Event Waitlist”.
- c. Edit the **Text Above Header** if required. The default is blank.
- d. Edit the **Page HTML**, adding data fields in the usual way if required.

For example:

“This event has reached its registration capacity. Select the check box below to be automatically registered for the event should a space become available.

If you *are* auto-registered, you’ll receive an email confirming your registration.”

- e. Edit the **Label** of the option the registrant must click to go onto the waitlist.
Default value: “Add to Waitlist”
- f. Edit the **Error Message** shown to the registrant if they don’t select the option.
Note: If the waitlist option is on the form, the registrant *must* select it.

5. Set the Form Up

- a. Go to **Plan > Forms > (form) > Setup**
- b. Select ‘**Allow form to remain open when event Registration Capacity is reached**’.
- c. Add an **Event Waitlist** section to the form sequence.

Event Waitlist Queue

When a registrant goes onto the waitlist, their registration is added to the **Event Waitlist Queue**. You can see the event’s queued records below the Event Waitlist options on **Plan > Configure > Options**.

The records shown include *all* the *Active* and *Complete* registrations that have been queued, and whose Live/Test mode is the same as the event’s. They include those that have been processed (that is, changed from waitlisted to registered). The details shown for each record include:

- Full Name
- Waitlist In Date – When they joined the waitlist
- Date Processed – When the registration was processed (if it has been, yet)
- Queue Order – 1 = first to join the queue
- Is Processed? – Yes or No
- Source – Automatic or Manual (if processed)

This is *read-only* information, giving you full visibility of the queue at any time.

The queue is processed on a strict First-In First-Out basis. But if you want to move someone from waitlisted to registered you can always do so by changing their **Status** in any of the ways listed below. This overrides the capacity restriction, which applies only on attendee-side forms.

Note: Registrations join the Waitlist Queue when their status is set to the one selected as **Waitlist Status** (see [Step 3c](#)), regardless of *how* it was set. That is, not *only* via registration forms, but also in *any* other way, including:

- Manual entry on the Attendee Profile
- Registration import
- Mass actions

Similarly, registrants can have their status changed *from* the Waitlist Status **to** the **Update Reg Status** by any of those means.

Important Notes

• The Scheduled Task

A scheduled task runs once a minute looking for waitlisted registrants and changing their status to registered if space has become available.

Important: This means there is the *possibility* that if a cancellation occurred during this one-minute window, a registrant who's *not* on the waitlist could access the form and register, taking an available slot. If you are concerned about this, you should continue to use the previous manual waitlist processes instead of automatic waitlisting.

• Fee-Based Events

If an event is fee-based, then waitlisted registrants will still accrue charges for any fees associated with their registration; they will still be presented with the payment page before completing their registration.

If they enter a credit card number, then the card information will be securely **stored but not processed** upon submission.

If space becomes available and the registrant is accepted into the event, then either the registrant needs to log back into their registration to process their payment **or** a planner needs to process it manually.

• Clearing the Registration Capacity

If a planner clears the **Registration Capacity** field for an event (in **Event Setup > Details**) that would make the capacity infinite.

Every waitlisted registration would become registered, their status changing to the one selected as **Update Reg Status** in [Step 3e](#).

- **Attendee Type Waitlisting**

Event waitlisting and Attendee Type waitlisting are mutually exclusive. If you set up event waitlisting, as described here, do not set up capacities for attendee types.