

ChamberMaster/MemberZone Event Setup

Agenda

- Overview of Events Module
- Setup Event Default Settings (Admin)
- Review Setup of Event Fee Items (Admin)
- Find Events
- Create and Publish an Event






Events Module Overview

The Events module is designed to help you navigate every aspect of the event process

Everything from inviting attendees to tracking registrations to creating invoices

WIKI: [Events Module Overview](#)

Ye Ol' Rodeo BBQ

Share:     


Advertising Opportunities are Going Fast!
Contact the Chamber for more information.

Name: Ye Ol' Rodeo BBQ

Date: June 17, 2017

Time: 6:00 PM - 11:00 PM CDT

Register Now



Back to Calendar

Location:
Joe's Pasture
21748 South Raider Court - Crosby
[View a Map](#)

Date/Time Information:
June 17, 2017 6pm - 11 pm
Fireworks at Dusk

Contact Information:
Cheri Petterson
[Send an Email](#)

Fees/Admission:
\$50.00 per person

Set a Reminder:

Enter your email address below to receive a reminder message.

Enter Email Address

-- Select Days Before Event --

Event Description:

Enjoy the best barbeque around, live music & more!

Events Module Overview

The Events Module consists of the following tabs:

- **Calendar:** Displays the internal events calendar in one of five views photos and images
- **General:** Allows you to update the general information about an event (i.e. date, time, location, photos, maps, etc.)
- **Fees:** Assign event fees, billing preferences, and discounts based on age, date, or volume
- **Sponsors:** Manage event sponsors by adding sponsorship level, logos, etc.
- **Advanced:** Add Custom Fields to your registration form, monitor goals, add message
- **Guest List:** Send invitations; add guests to the roster; print roster sheet, labels, and name tags; send emails; register invitees
- **Account:** View income and payment activity, generate invoices and sales receipts (if applicable)
- **Files:** Keep track of files associated to the event, i.e. catering contracts
- **Tasks:** If using Projects/Tasks you can design a project to keep track of all of the tasks that must be completed for a successful event.

Setup Event Default Settings

Calendar Options

- The display of your online Events calendar may be customized
- In addition to these selections, there is an option to create your own list of Event Categories

WIKI: [Event Options & Settings](#)

Organization Management

Chamber Management: Event Options & Settings

General Settings


☒ Allow public users to submit events for display (requires approval of each submitted event by chamber staff).

Upcoming Events List

Heading/Title: Upcoming Events

Maximum List Size: 10

List Position: Middle

☐ Display  icon on Event Search page.


Featured Events List [edit featured events](#)

Featured Events Title: Featured Events

Maximum List Size: 10

List Sort Order: Start Date

List Position: Bottom


☐ Display  icon on Event Search page.

New Events List (RSS-only)

New Event List Title: New Events

Maximum List Size: 10

List Sort Order: Creation Date

☐ Display  icon on Event Search page.

iCal Import

+ Add

Registration & Billing Preferences

Ensure you have “Enable Updated Event Registration and Guest List (Beta)” enabled

Registration and Billing Preferences

Registration Member Authentication Method ?

- ☐ Email Address Only (No Password Required)
- ☐ Login Name and Password
- ☒ Login Name and Password / Email Address Only (Dual Option)
- ☐ Member Names List and Password

Registration Preferences

- ☐ Enforce required fields for staff.
- ☐ Require registrants to provide a company name.
- ☐ Require registrants to provide an email address.
- ☐ Require registrants to provide first name.
- ☐ Require registrants to provide a phone number.
- ☐ Require registrants to provide an address.
- ☐ Allow online registrants to include multiple attendees on a single registration.
- ☒ Send an automatic Registration Confirmation email to consumers registering online.
- ☐ Send an automatic Registration Notification email to our association at
- ☒ Display event reminder sign-up box on public event details page ?
- ☒ Enable updated event registration and Guest List (BETA)
- ☐ Always open full attendee editing screen
- ☐ Display unlinked attendees from previous registrations in selection list ?
- ☒ Display representatives from other members in selection list

Default Company Name when staff create/edit a registration ?

- ☒ Company Name (Members->General tab)
- ☐ File-by Name
- ☐ Web Display Name (Members->Web tab)

Default Line Item Description:

Default Bill/Sold To Contact Type:

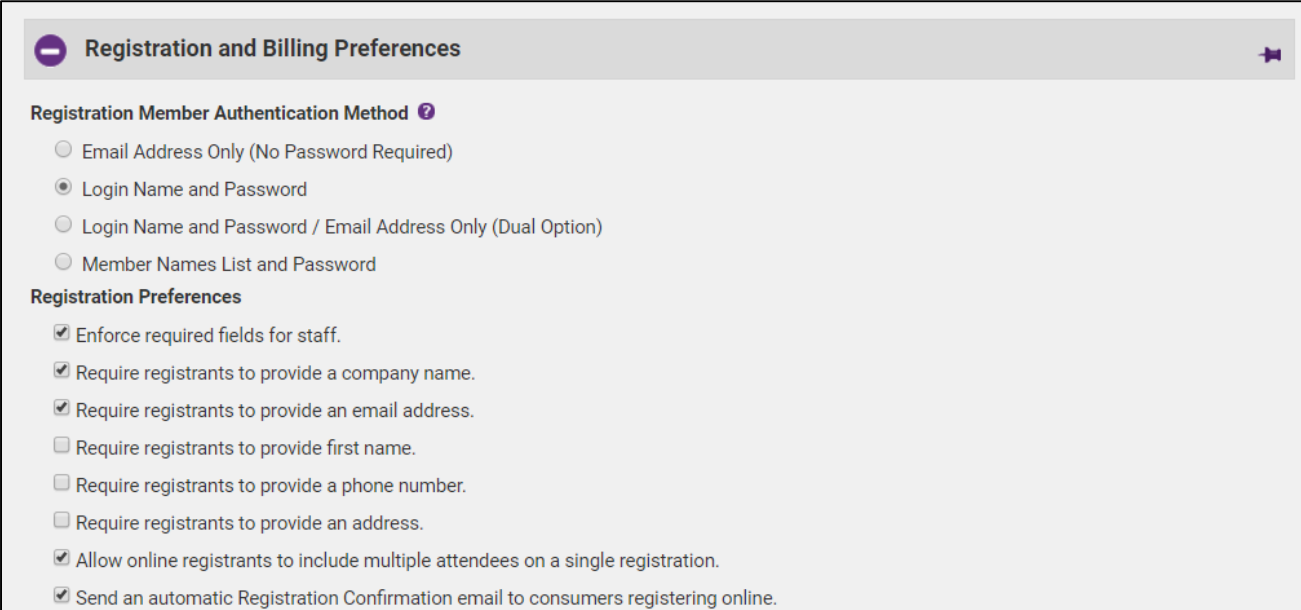
Default Transaction Class:

Registration & Billing Preferences

Registration & Billing Preferences allow you to set defaults for:

- How the system identifies members for member pricing
- Default required fields on your event registration form
- Allows you to customize terminology and email confirmations used for events

WIKI: [Registration & Billing Preferences](#)



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Registration & Billing Preferences

Registration Preferences

Allows you to setup the required fields on your registration form as well as additional registration options

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Registration & Billing Preferences

Terminology Options

Allows you to customize the messages display on the registration page

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Default Transaction Class:

Registration & Billing Preferences

Invoice/Receipt Options

Allows you to manage non-member registrations

You can associate all non-members to a single member (recommended) OR

For each non member you create a new member (could become unwieldy)

Invoice/Receipt Options

- ☒ Assign **only non-member** invoices/receipts to a single Member: [▶ Golf Tournament Non-Member](#)
- ☐ Create a **new Member** for each non-member participant that pays by credit card to assign the invoice/receipt to.

Registration & Billing Preferences

Credit Card Payment Tracking Options

Allows you to manage tracking of credit card transactions

NOTE: “Do not create Credit Card Payment records” is not recommended

Credit Card Payment Tracking Options

- ☐ Create a new Invoice and Payment for each Credit Card Payment
- ☐ Create a new Sales Receipt for each Credit Card Payment
- ☒ Do not create Credit Card Payment records

Registration & Billing Preferences

Registrations Email Confirmation Billing Message Options

Registration Email Confirmation Billing Message Options	
Credit Card:	Online Credit Card Payment.
Invoice:	You will be invoiced for the amount due.
Cash or Check:	Cash or check payment for the amount due will be expected at the time of the event.
No Charge:	No Charge.
Non-Specific Pmt Type:	We will be in contact with you regarding registration fees for this event.
Chamber Message:	<div>▶ edit</div>

Fee Items

If an event requires a fee in order to participate, the Event Fee must be created in before it can be assigned to the event

Setup > Billing Options > Fee Items

WIKI: [Working with Fee Items](#)

Administrative Options: Edit Fee Items

list options

Item Type:

Collection Basis:

☒ Hide inactive fee items.
☒ Count only active members/approved events.

Refresh List

Print List

Add Fee Items

Reset Options

Type	Basis	Fee Item Name	Fee Amount	Description	Account	Associations	
EVENT	CASH	Event	\$0.00 Edit Pricing		Default Accounts Receivable Events	3 Events	<input checked="" type="checkbox"/>
DUES	CASH	General Membership	\$1000.00 Edit Pricing		Default Accounts Receivable Membership	9 Members	<input checked="" type="checkbox"/>
DUES	CASH	Membership Setup	\$0.00 Edit Pricing		Income	4 Members	<input checked="" type="checkbox"/>
DUES	CASH	Monthly Lunch	\$25.00 Edit Pricing		Default Accounts Receivable Events	0 Members	<input checked="" type="checkbox"/>
DUES	CASH	MyChamberApp Optional Fee	\$10.00	Promote Your Business on MyChamberApp - Optional (<i>voluntary</i>)	Default Accounts Receivable Membership		
EVENT	CASH	Sponsorship	\$0.00 Edit Pricing	Event Sponsor	Income	2 Events	<input checked="" type="checkbox"/>
GROUP	CASH	Volunteers Fee	\$2.00 Edit Pricing		Income	0 Groups	<input checked="" type="checkbox"/>

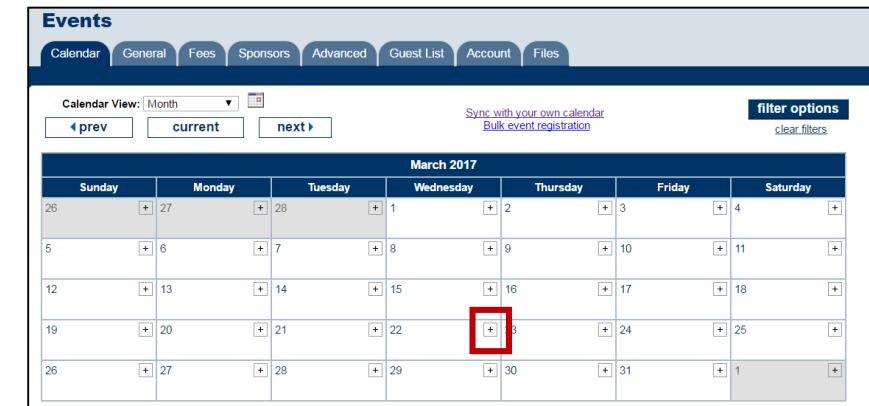
Add Fee Items

Print List

Add a New Event

Adding an event to the calendar may be done at any time using the **Add** menu OR by clicking the + sign when the **Calendar** tab is displayed

WIKI: [Adding Events](#)



Add a New Event

The Wizard will walk you through...

1. General Information
2. Descriptions/Appearance
3. Fees/Billing Information
(NOTE: It is recommended that you add fees after completing the wizard if you wish to include custom fields)

Add a New Event

Step 1: General Information
Step 2: Descriptions/Appearance
Step 3: Fees/Billing Information

Event Title: Copy a Past Event

Time Zone: (GMT-06:00) Central Time Show/Select from all time zones

Start Date/Time: 5/24/2017 ▼ ▼ ▼ ☒ All Day Event

End Date/Time: 5/24/2017 ▼ ▼ ▼ [same as start date](#)

Reminder: ▼ ▼ ▼ ☐ Send automatic [reminder](#) to all registrants

Recurrence: None ▼

Professional Development Hours: Continuing Education Units:

Goals:

Attendance:
Number of Sponsors:

Total Revenue:
Sponsorship Revenue:

Approval Status: Approved ▼

Visibility:
☐ Internal Event Calendar
☒ Display on Public Events Calendar
☐ Display on Member Information Center Calendar
☐ Display on Featured Events

Event Category: [edit categories](#)

☐ Arts & Culture
☐ Chamber Of Commerce
☐ Clubs/Organizations

☐ Community
☐ Continuing Education
☐ Festivals & Celebrations

☐ Government
☐ Holiday
☐ Networking

☐ Recreation & Sports
☐ Schools

<< Back
Next >>
Finish
Cancel

Add a New Event

General Information

Event Name, Time, Location, etc.

Approval Status

Visibility – On which calendars do you wish to display this calendar

Event Category – allows for searching

Add a New Event

[Step 1: General Information](#)
[Step 2: Descriptions/Appearance](#)
[Step 3: Fees/Billing Information](#)

Event Title:

Time Zone: (GMT-06:00) Central Time

Start Date/Time: 4/20/2017 : : ☒ All Day Event

End Date/Time: 4/20/2017 : : [same as start date](#)

Reminder: : : ☐ Send automatic reminder to all registrants

Recurrence: None

Professional Development Hours: Continuing Education Units:

Goals:

Attendance:
Number of Sponsors:

Total Revenue:
Sponsorship Revenue:

Approval Status: Approved

Visibility:
☐ Internal Event Calendar
☒ Display on Public Events Calendar
☐ Display on Member Information Center Calendar
☐ Display on Featured Events

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[edit categories](#)

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☐ Government
☐ Holiday
☐ Recreation & Sports

☐ Schools

Add a New Event

Descriptions/Appearance






Allows you to add additional information about the event, and format how this information is displayed on your web-site

Click the Advanced Edit option for additional ways to format your display text (i.e. add images)

Add a New Event






[Step 1: General Information](#)
▶ Step 2: Descriptions/Appearance
[Step 3: Fees/Billing Information](#)

Event Description:
[▶advanced edit](#)

B ***I*** **U** **A** Font Size     






Make new connections at our Speedy Networking event!
Participants meet and mingle with other business professionals in a format based around a fast-paced

Location Description:
[▶advanced edit](#)

B ***I*** **U** **A** Font Size     

Paul Bunyan Brewery
56447

Date/Time Description:
[▶advanced edit](#)

B ***I*** **U** **A** Font Size     

Thursday, April 20th 5pm - 8pm

Add a New Event

Assign Fees

Select Previously created Fee Items

Configure On-line registration options

Note: you will be able to add/edit fees and settings later if needed

Add a New Event

Step 1: General Information
Step 2: Descriptions/Appearance
Step 3: Fees/Billing Information

Event Fee Types Available for this Event				
Display Name	Description	Public	Eligibility	Amount
Add fees by clicking on the Assign Fee Items button below.				
				Assign Fee Items

Online Registration Options

☒ **Allow members to register online for this event.**
Active, Courtesy members receive "Member" pricing;

☐ Allow registrant to make payment with a **Credit Card** (online only).
☐ Allow registrants to request to be **Invoiced** for fees incurred.
☐ Allow registrants to specify that they will pay by **Cash or Check** at the time of the event.

☒ **Allow non-members to register online for this event.**
Non-Member, Prospective members receive "Non-member" pricing

☐ Allow registrant to make payment with a **Credit Card** (online only).
☐ Allow registrants to request to be **Invoiced** for fees incurred.
☐ Allow registrants to specify that they will pay by **Cash or Check** at the time of the event.

[<< Back](#)
[Next >>](#)
[Finish](#)
[Cancel](#)

View/Edit your Event


Facts displayed about an event are based on information from the event's **General tab**

In addition to this basic information, the Event Information area on the general tab, you can add photos, videos & maps

WIKI: [General Information](#)

Photos & Images



Search Results Icon:



+

1

Click the 'Plus' button to select or upload an image to display as the search results icon for this event. You can even crop it!

Image Type	Image	Size	Action	
Main Event Photo		373 x 500	Change Image Remove Image	
Gallery Photo	 <div>click image to enlarge</div>	299 x 400	Change Image Remove Image	
New Gallery Photo			Add Image	
YouTube Video	https://youtu.be/rHzfwgjjppag			Change Video Remove Video
Map Image	<div> <div> <div> <input checked="" type="radio"/> Google Maps <input type="radio"/> Uploaded Image <input type="radio"/> None </div> <div> <div>Street Addr:</div> <input type="text" value="21748 S Raider Court"/> </div> <div> <div>City/State/Zip:</div> <input type="text" value="Crosby"/> <div> <div>Min</div> <input type="text" value="56441"/> </div> </div> <div>view map</div> </div> </div>			

View/Edit your Event

You may add additional fields to your event (i.e meal choice, dietary restrictions, etc.) by setting up custom fields

WIKI: [Add Custom Fields](#)

Custom Registration Fields ?

Custom Registration Fields

	Field Name	Public Display Text	Field Type	Field Size	Public	Required	
	Meal Choice	edit	Select	edit items	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Dietary Restrictions	edit Do	Text	50	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Add A Field

Remove Selected Fields

Save Changes

View/Edit your Event

Events that require a fee to participate can be managed through the Events module. Event fees, designated for members or non-members, may be associated with each event

WIKI: [Setup Event Fees](#)

Events

Calendar

General

Fees

Sponsors

Advanced

Guest List

Account

Files

Tasks

Floral Festival

Event Registration Fees ?

Event Registration Fee Options Available for this Event

Drag fees in the order you want them to appear on the registration form.

	check all clear all	Display Name	Description	Public	Eligibility	Amount
iii	<input type="checkbox"/>	Floral Festival Registration Fee - Members	Floral Festival Registration Fee - lunch, wine glass, garden tour	<input checked="" type="checkbox"/>	Members	\$25.00
ii	<input type="checkbox"/>	Floral Festival Registration Fee - Non Members	Floral Festival Registration Fee - lunch, wine glass, garden tour	<input checked="" type="checkbox"/>	NonMems	\$50.00
iii	<input type="checkbox"/>	Floral Festival Registration Fee - Table of 8	Floral Festival Registration Fee - lunch, wine glass, garden tour for 8 people	<input checked="" type="checkbox"/>	Any	\$250.00
ii	<input type="checkbox"/>	Floral Festival Sponsorship	Floral Festival Registration Fee - lunch, wine glass, garden tour for 4	<input checked="" type="checkbox"/>	Any	\$250.00

Remove Selected Fee Items

Assign Fee Items

View/Edit your Event

Any event may have special discounts available

Discounts based on age, date, or volume may be created for each event and applied when appropriate information is provided during registration or the discount criteria is met because of date or volume.

WIKI: [Create Discount Options](#)

Discount Options

Age-Based Discounts

check all clear all	Age Range	Discount Name	Description	Applies To	Amount
<input type="checkbox"/>	0 - 5	Kids under 5 Eat Free		Floral Festival Registration Fee - Members	\$25.00 off

Remove Selected Items
Add Discount

Early Registration Discounts

check all clear all	Reg. Date	Discount Name	Description	Applies To	Amount
<input type="checkbox"/>	before 2:00pm on 9/12/2018	Early Bird Registration		All Fees	20.0% off
<input type="checkbox"/>	before 2:00pm on 9/12/2018	Early Bird Registration - Non Members		All Fees	20.0% off

Remove Selected Items
Add Discount

Preview Event Page

On the General Tab, you will find a Preview Event Page option so you can easily review what your event page and registration page will look like

Events

Calendar General Fees Sponsors Advanced Guest List Account Files Tasks

Floral Festival

Save Cancel Preview Event Page Delete Event

Event Information

Title: Floral Festival

Time Zone: (GMT-06:00) Central Time ☐ Show/Select from all time zones

Start Date/Time: 9/29/2018 2:00 PM ☐ All Day Event

End Date/Time: 9/29/2018 7:00 PM [same as start date](#)

Reminder Date/Time: 9/25/2018 10:00 AM ☒ Send automatic reminder to all registrants

Recurrence: None

Approval Status: Approved Professional Development Hours:

Display Status: Approved Continuing Education Units:

Limit Attendee Count To: 200 (current attendee count: 2)

Enable waiting list: ☒

Limit Attendees per Registration:

Description: [advanced edit](#)

Beautiful flowers and luncheon by Chef Dox


Floral Festival

Name: Floral Festival

Date: September 29, 2018


Time: 2:00 PM - 7:00 PM CDT

[Register Now](#)



[To Current Calendar](#)

Event Sponsors:
-Premium Sponsor



Location:
Rabbit Lake
[View a Map](#)

Date/Time Information:
Registration at 2
Lunch at 3
Garden Tour at 5

Contact Information:
[Send an Email](#)

Fees/Admission:
\$25 members
\$50 Non Members
\$500 Sponsor
\$200 table of 8

Event Description:
Beautiful flowers and luncheon by Chef Dox