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](#)
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
Registration & Billing Preferences

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

Registration Preferences

Allows you to setup the required fields on your registration form as well as additional registration options.
Registration & Billing Preferences

Terminology Options

Allows you to customize the messages display on the registration page
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)

- 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
Registration & Billing Preferences

Registrations Email Confirmation Billing Message Options

<table>
<thead>
<tr>
<th>Registration Email Confirmation Billing Message Options</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Credit Card:</strong></td>
</tr>
<tr>
<td><strong>Invoice:</strong></td>
</tr>
<tr>
<td><strong>Cash or Check:</strong></td>
</tr>
<tr>
<td><strong>No Charge:</strong></td>
</tr>
<tr>
<td><strong>Non-Specific Pmt Type:</strong></td>
</tr>
</tbody>
</table>

Chamber Message: [edit]
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
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

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

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

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
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](#)
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
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
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

<table>
<thead>
<tr>
<th>Discount Options</th>
<th>Age-Based Discounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Age Range</td>
<td>Discount Name</td>
</tr>
<tr>
<td>0 - 5</td>
<td>Kids under 5 Eat Free</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Early Registration Discounts</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reg. Date</td>
</tr>
<tr>
<td>before 2:00pm on 9/12/2018</td>
</tr>
<tr>
<td>before 2:00pm on 9/12/2018</td>
</tr>
</tbody>
</table>
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.