How to Create a Single-Activity Event

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How to Create a Single Activity Event

What you will learn

Learn how to create a single-activity event with a formatted description, varied pricing, questions for registrants and more. Additionally, you'll learn how to set up and manage a Waitlist, and create an event that repeats over multiple dates.

What you will see

Caution – Warnings about the effects of some settings.

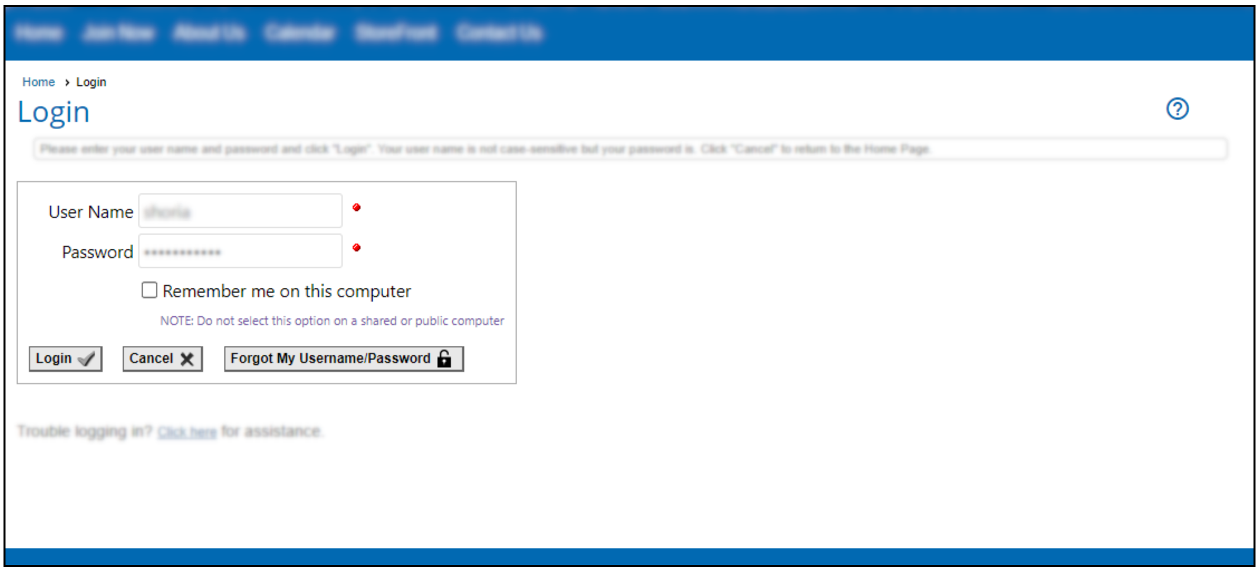
Good to Know – Information that will help you choose the right settings across your website.

Pro-Tip – Advanced tips and things you can do beyond this guide.

Part 1. Adding an Event

Navigating to the Events Module

Step 1. Log in to your website using your username and password.



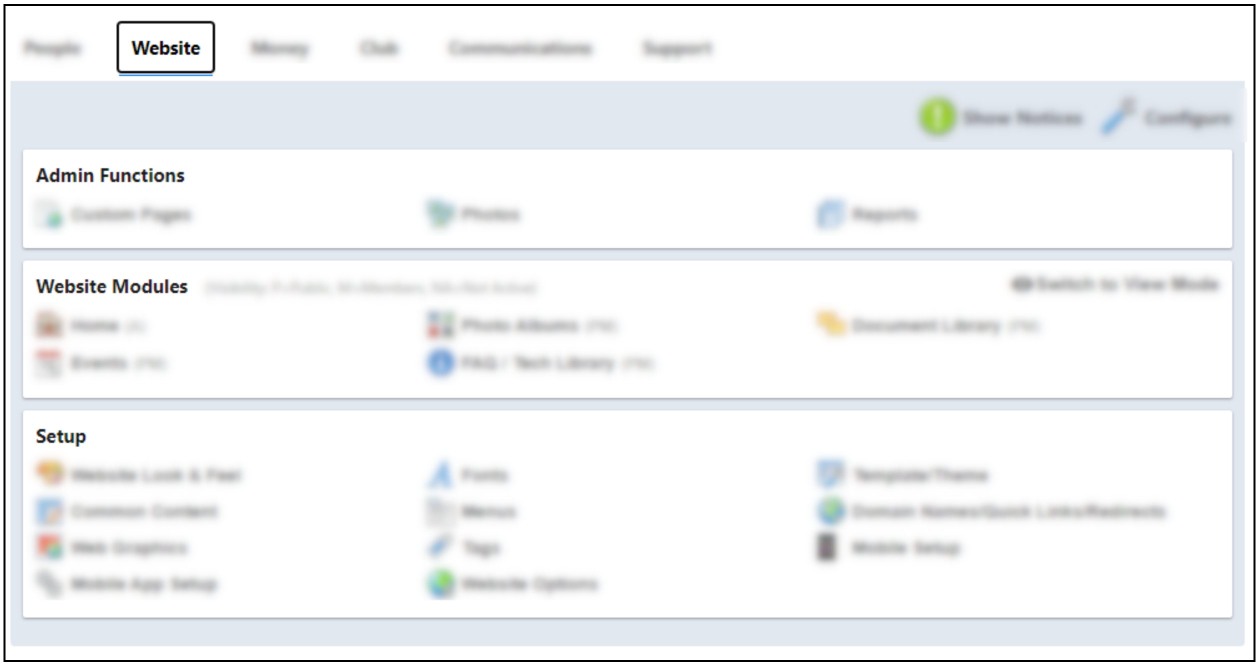
Step 2. Look for the Control Panel link at the top right or left-hand corner. The Control Panel is the “back office” of your organization and website.

Select the **Control Panel** link.

Step 3. The Control Panel has six (6) tabs.

- People Tab – Member and non-member databases, settings, and reports.
- Website Tab – Options to customize the home page, custom pages and look and feel of your website.
- Money Tab – Financial settings, data, and reports.
- Club Tab – Configure basic club information and club officers.
- Communications Tab – Communication features and settings.
- Support Tab – Access to our Online Help System, video tutorials, manuals, and the Administrator Forum.

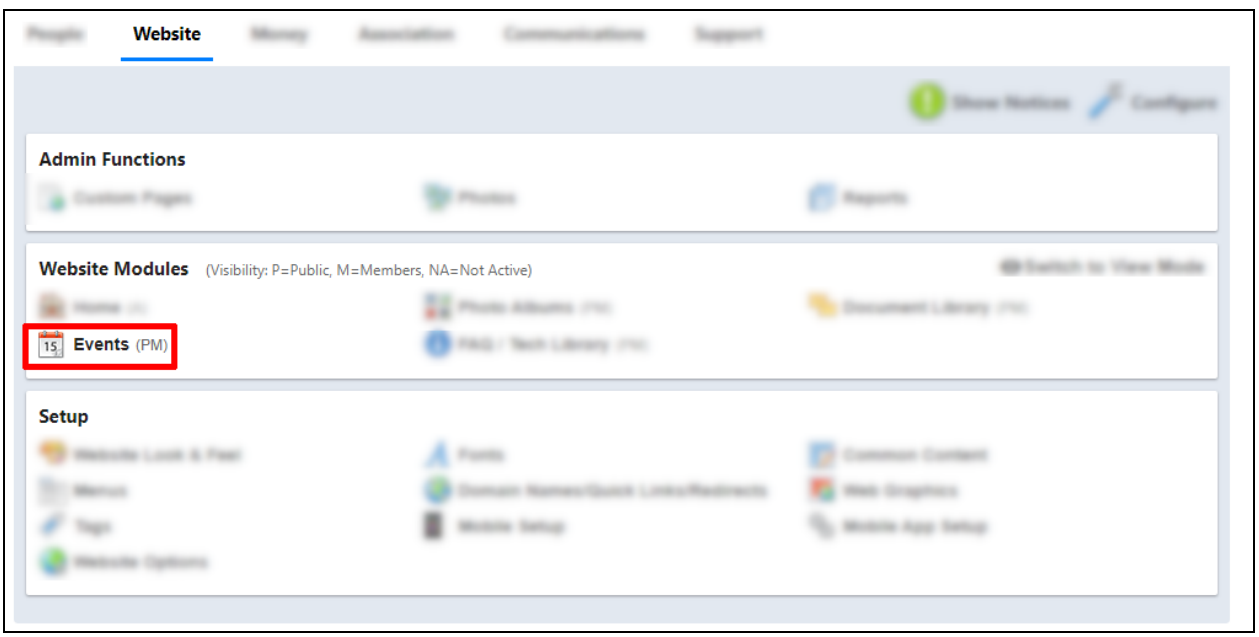
Select the **Website Tab**.



Step 4. The Website tab has three (3) panels.

- Admin Functions – The day-to-day functions of your organization, including databases and reports.
- Website Modules – Listing the enabled modules for that category.
- Setup – Setup options for the look and feel of your website, menus, common content and more.

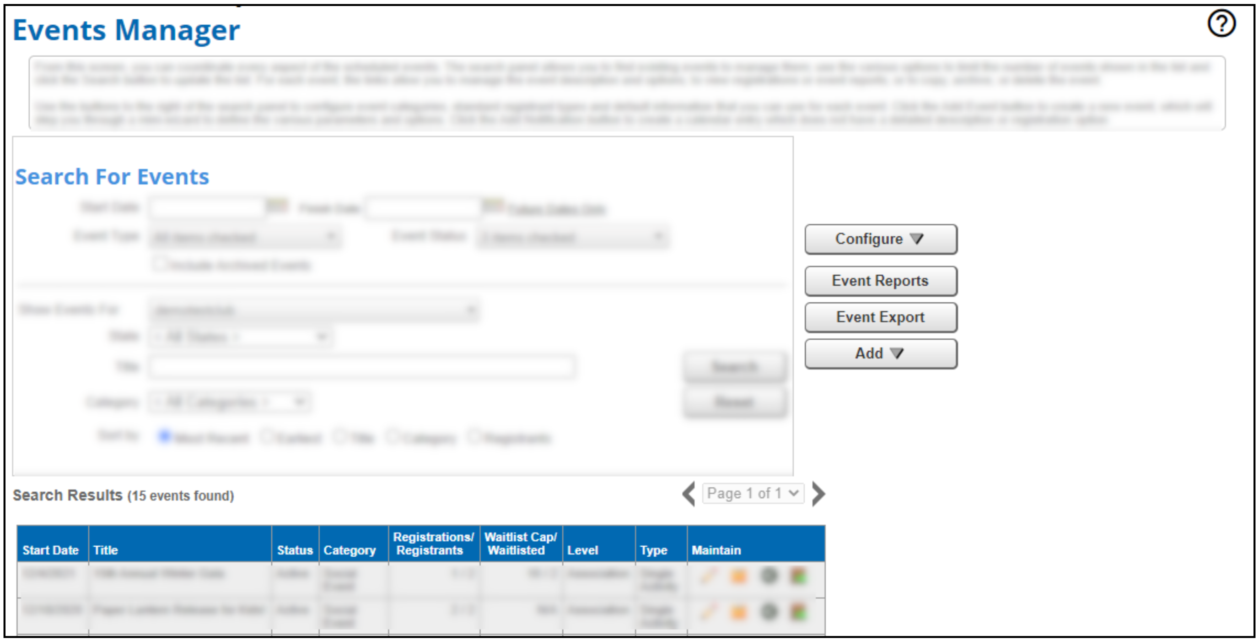
In the second section, "Website Modules", select **Events**.



The *Events Manager* screen is where you will add events to your organization calendar.

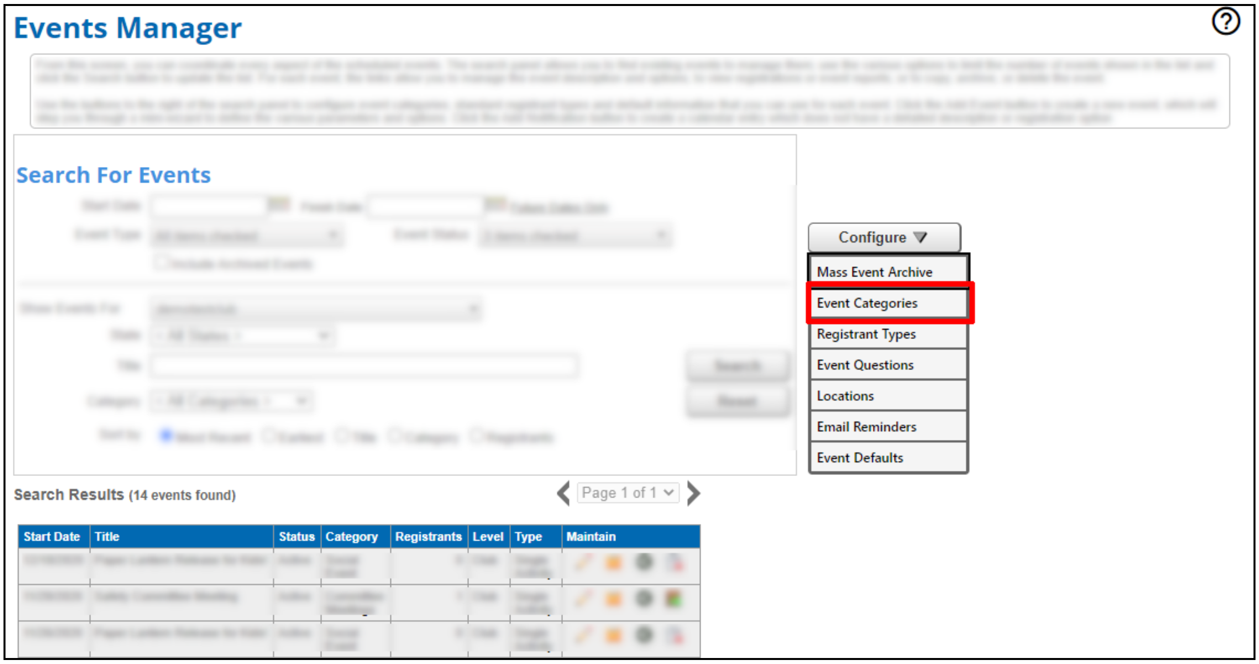
At the top of the Events Manager screen is a *Search Panel*. To the right of the Search Panel are options to configure and manage the Events module.

Each event you create will appear in a grid with options in the *Maintain* column. View a description of each icon in the Maintain column by hovering over the legend icon in the header of the Maintain column.



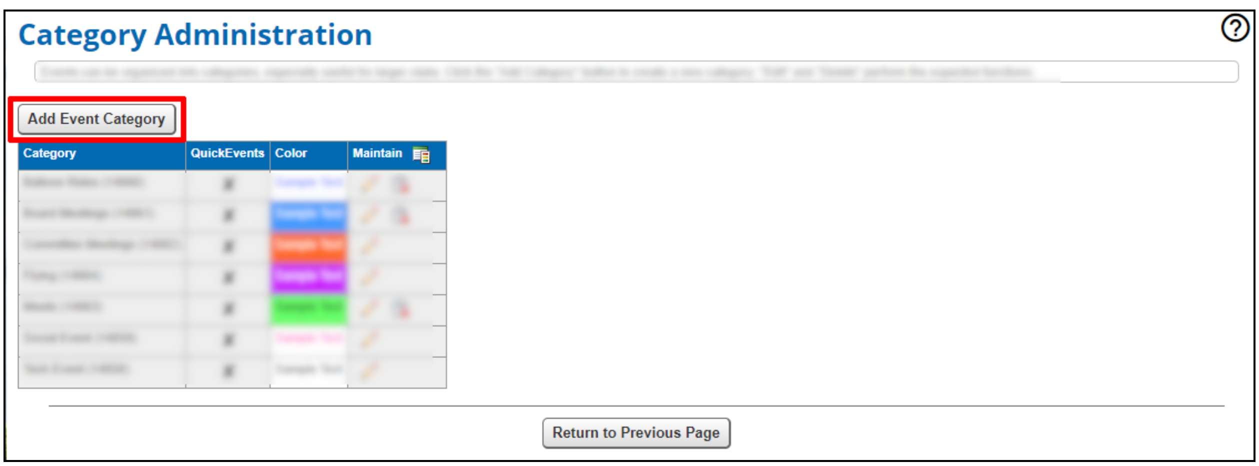
Configure Event Categories

Adding categories can help you organize all the events you create and help members search for events. For example, you might create one category for educational events, and another for social events. Select **Configure** to view a drop-down menu of options. Select **Event Categories** to go to the Events Category Administration screen.

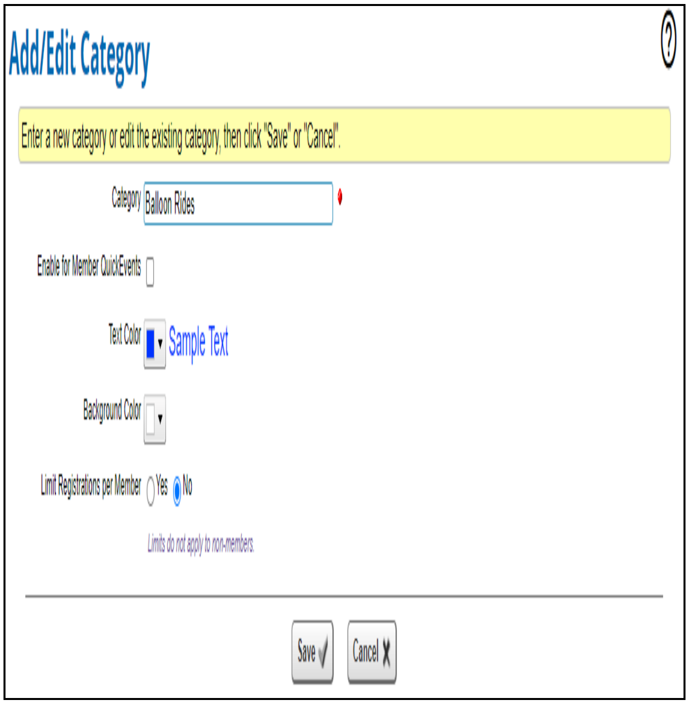


Step 5.The Events Category Administration screen is where you will add and manage your event categories. The screen contains a grid listing any categories you create, the color used to show the event on the calendar, and the option to edit the category, or delete the category if it is not being used to define any events.

Select **Add Event Category** to add a category.



Step 6. Add a Category



a. Category - Enter a name in the **Category Name** field.
b. **Enable for Member QuickEvents** - Select this option to allow members to create QuickEvents using this category.

QuickEvents
QuickEvents are easier to define than a single or multiple-activity event. They contain only one screen of information, similar to a Google Calendar event. These events are easier to register for, and you can even offer an RSVP option to members for even simpler registration. There are some limitations, for example a QuickEvent cannot have a fee associated with registration.
You can allow members to create QuickEvents in Configure > Event Defaults, with or without administrator approval.

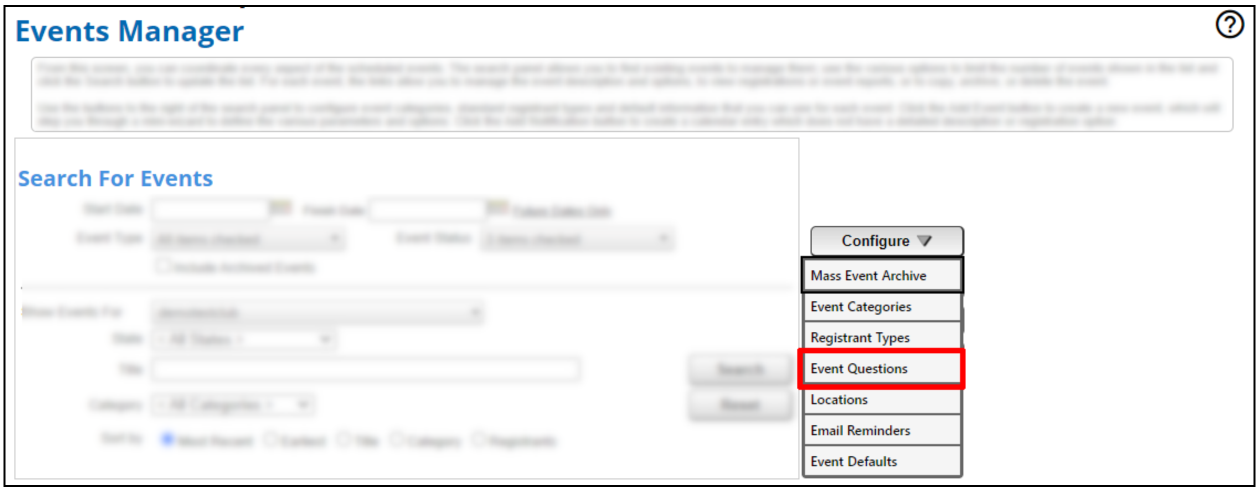
c. (Optional) Select **Text Color** to choose a color for the text of the event name on the calendar in grid view (or for the date of the event in list view).
d. (Optional) Select **Background Color** to choose a color for the background of the event name on the calendar in grid view (or for the date of the event in list view).
e. **Limit Registrations per Member** - Select **Yes** to limit the number of events a member can register for in this category. When you select Yes, two additional fields will appear. Select the **date range** to apply the limit to, and the **maximum number of registrations** per member.
f. Select **Save** to save your changes and return to the Events Category Administration screen, then select **Return to Previous Page** to return to the Events Manager screen.

Configure Event Questions

Questions can be created and presented to members and non-members when registering for an event. The questions can be asked once per registrant, or once per registration (which can include multiple registrants). The questions must be created in *Event Questions* in order to be selected when creating an event.

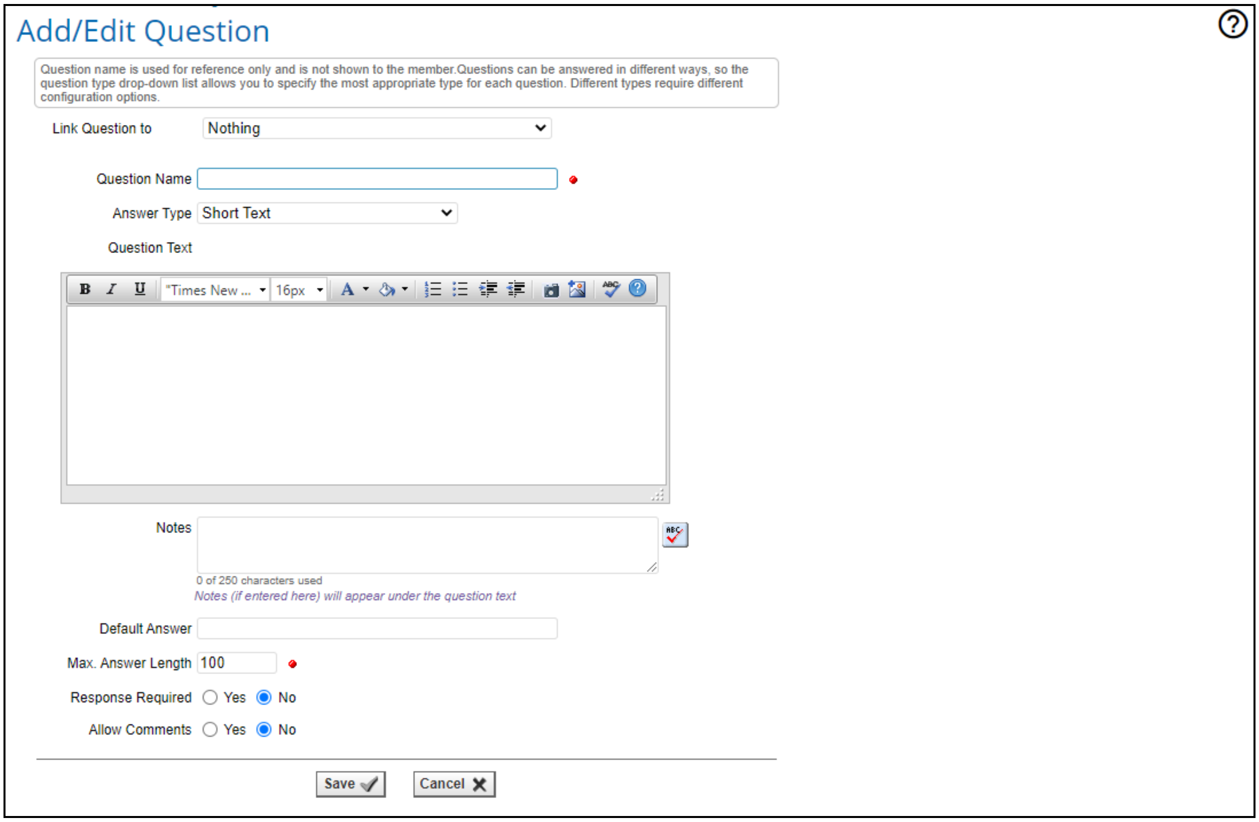
> **Note:** If registrants will not be given questions, skip ahead to Part 2.

Step 5. Select **Configure** to view a drop-down menu of options. Select **Event Questions** to go to the Event Questions screen.



Step 6. Select **Add Question** to add a question.

The Add/Edit Question screen is where you will create questions to ask of your members, or notes administrators enter for members.



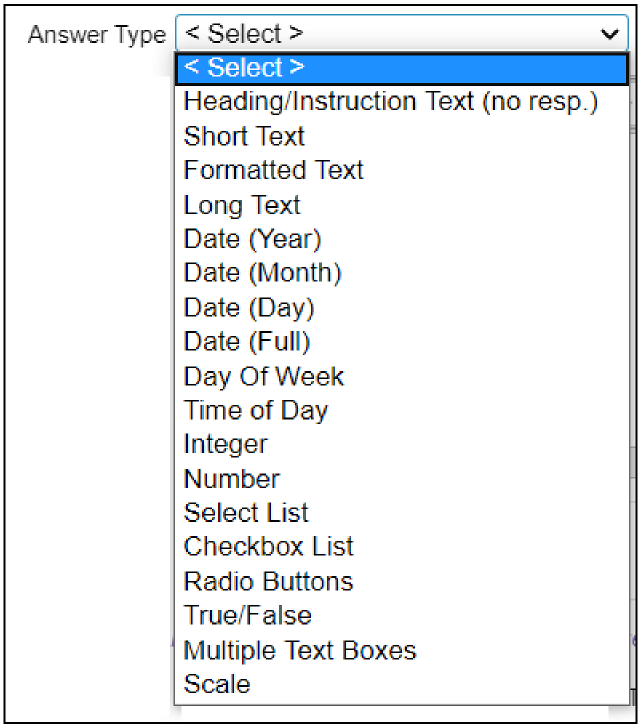
Step 7. Creating a question

a. **Link Question to** - Select an existing additional member data question or contact information question to link to the event question.

Linking Event Questions
If you link an existing question to an event question, when the member registers for the event their previous answers will auto-fill to save the member time during registration.

a. **Question Name** – This is the administrative name of the question that is displayed in the drop-down list of questions when creating an event. It is not displayed for the member. Enter the name of the question.
b. **Answer Type** – There are several answer types available to gather data from your members. Select the appropriate answer type. For a full description of each option, see the list of answer types at the

end of this guide.



c. **Question Text** – This is the question or prompt text which will appear for members. Enter the appropriate text.
d. **Notes** – This text, if filled, will display under the Question Text. Enter any additional notes your members may need to answer the question.

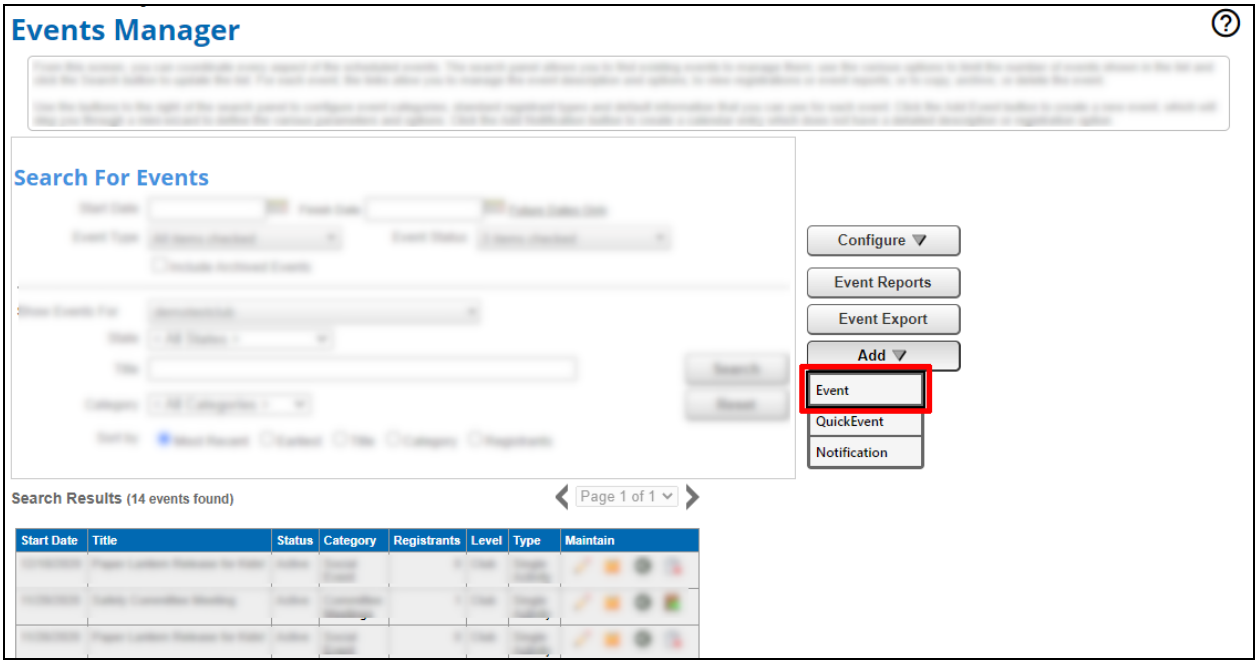
> **Note:** One or more additional fields may appear depending on your Answer Type selection. For example, a Number answer requires you to choose a minimum and maximum value. A Checkbox List requires you to list the items which will be presented to the user. For a full description of the Answer Types, additional fields and a detailed example, see the Answer Types section at the end of this guide.

Step 8. Select **Save** to save the question. You will be returned to the Event Questions screen.

Adding an Event

Step 9. Add an Event

Select **Add** to view a drop-down menu of options. Select **Event** to add an event and navigate to the *Event Creation Wizard*.

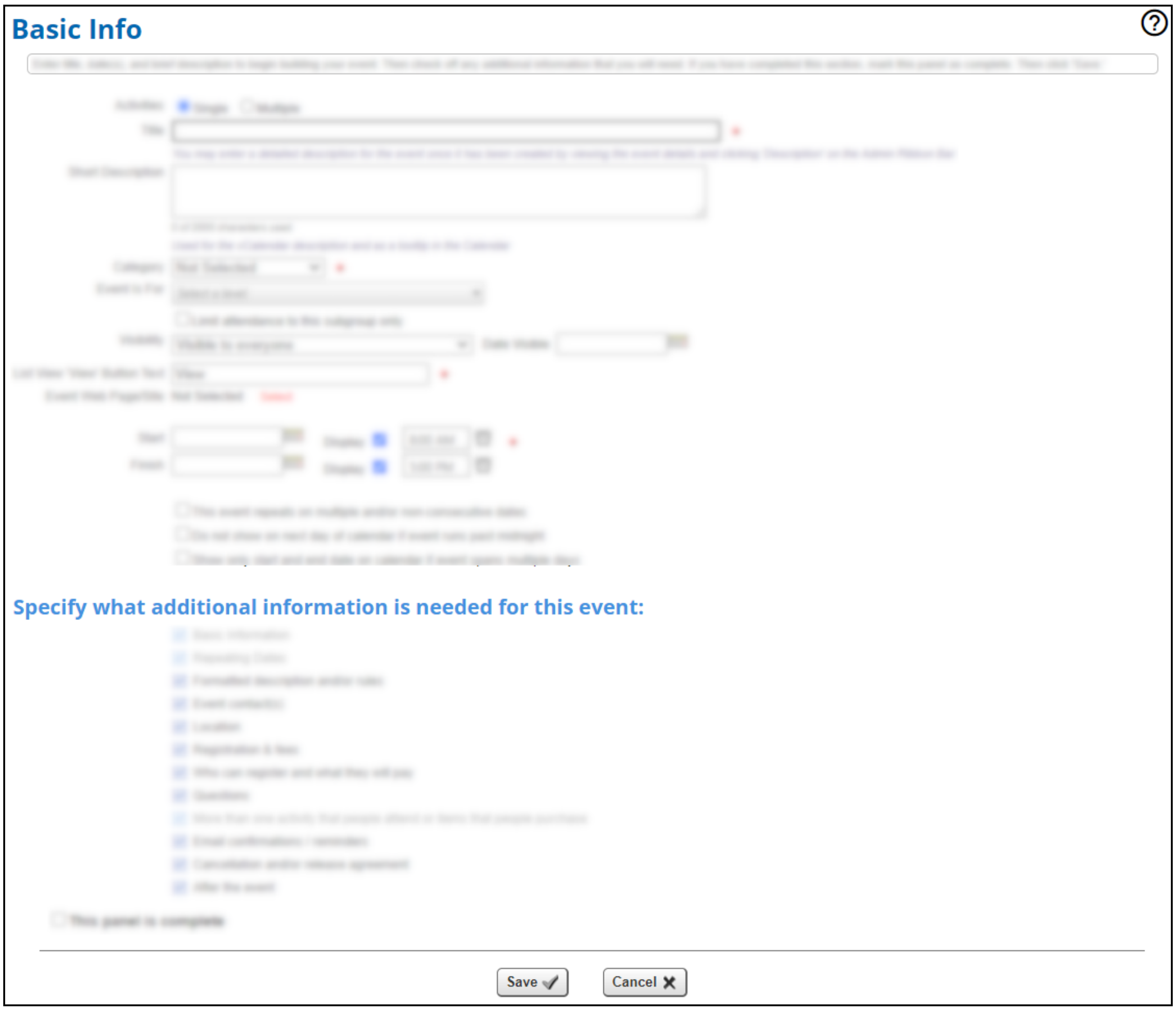

Events Manager
Search For Events
Configure
Event Reports
Event Export
Add
Event
QuickEvent
Notification
Search Results (14 events found)
Page 1 of 1
Start Date
Title
Status
Category
Registrants
Level
Type
Maintain

Part 2. Basic Info

The Basic Info screen is the first screen in the Event Creation Wizard. This is where you will configure the basic information for your event, as well as the additional types of information you will add for your members.

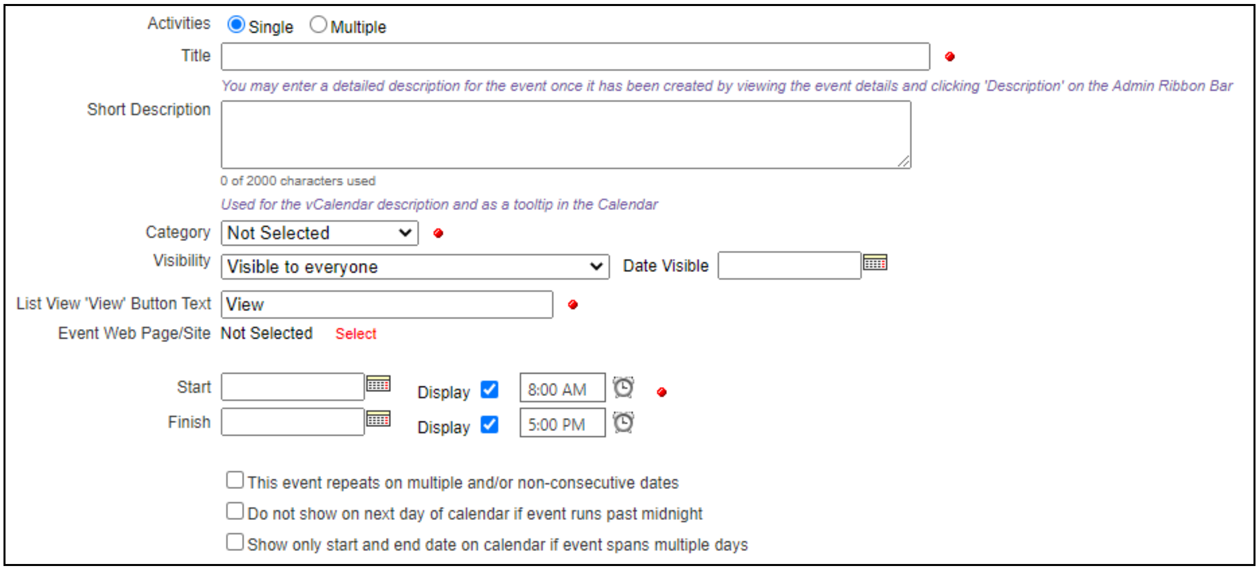
The Basic Info screen has two (2) sections:

- Basic Information - Basic information for the event, including the date and time.
- Additional Information - Select the types of additional information to add to the event.



Configuring Basic information

Step 1. Add basic information for the event.



a. Activities - Select **Single** to configure the event as a single-activity event.

Single vs. Multiple-Activity Events
A single-activity event is one which takes place in one location on one or more days, and attendees will sign up for the entire event. A multiple-activity event can take place at multiple locations over one or more days, and attendees can sign up for individual activities that occur over the span of the event. Each of those activities can have separate registrations and/or fees.

a. Title - Enter the **title** of the event. The title will display on the calendar in *both grid and list view*.
b. Short Description - Enter the **short description** of the event. The short description will display in *list view* when the user selects the *More Info* button in the event.
c. Category - Select the **category** to use for the event. The category will control the color of the event on the calendar in *grid view*, as well as the color of the date of the event in *list view*. Members can also find the event by searching for the selected category.
d. Visibility - Select the appropriate option.
    - **Visible to everyone** - everyone can view the event on the calendar and view event details.
    - **Visible to everyone, details for members only** - everyone can view the event on the calendar, however only logged-in members can view event details.
    - **Visible to members only** - only logged-in members can view the event on the calendar.
    - **Not Visible** - only administrators can view the event.

- (Optional) **Date Visible** - Select the calendar icon to display a pop-up date selector. Select the date the event should appear on the calendar. If a date is not selected, the event will be visible as soon as it is created.

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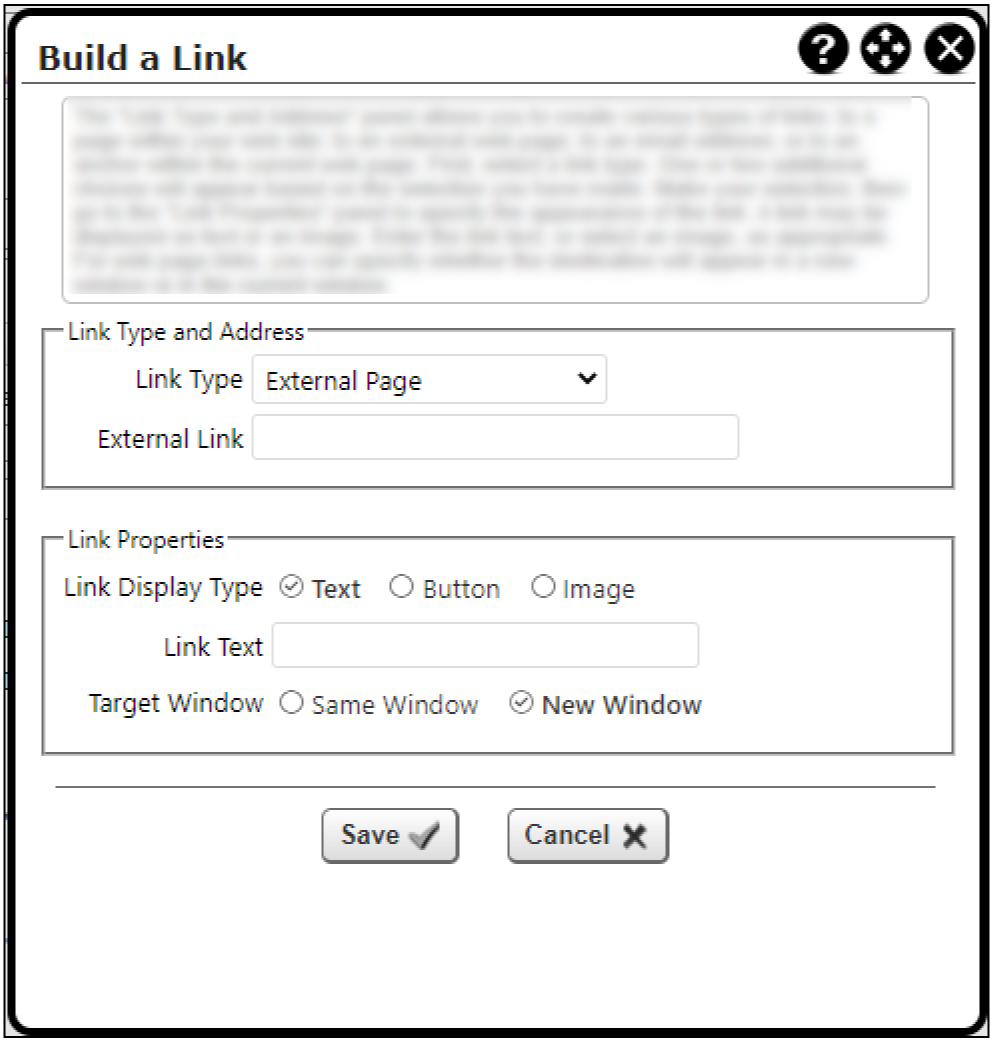
Event Visibility and Registration
Visibility settings are different from registration settings. For example, you can allow everyone to view an event, but only allow members to register. On the other hand, if you want non-members to be able to register for the event, be sure to allow them to view the event on the calendar. You will configure registration settings later.

e. (Optional) List View 'View' Button Text - Enter the **text** to display in list view in the button users will select to view more details about the event.
f. (Optional) Event Web Page/Site - If the event has an associated existing custom page, photo album, external website, etc., choose the appropriate **link** to display.

- Select the Select link to view the Build a Link pop-up dialog.



- Link Type and Address
  - **Custom Page** - Link to any custom pages you have created. The next field is a drop-down list of custom pages.
  - **Photo Album** - Link to a photo album, if the Photo Albums module is enabled. The next field is a drop-down list of categories; once you select a category, you can select a photo album within that category.
  - **External Page** – This is a link to a web page stored on another website. The next field will prompt for the External URL, the address of the website you wish to go to.
  - **Email** – The next field will prompt for the Email Address.
  - **Blog** - Link to any blog, if the Blogs module is enabled. The next field is a drop-down list of available blogs.
  - **Volunteering Opportunity** - Link to any volunteering opportunity, if the Volunteering module is enabled. The next field is a drop-down list of available opportunities.
  - **Add to Mailing List link** - Enter a link the allows non-members to add themselves to your organization's mailing list. These non-member contact are also automatically added to your non-member database.

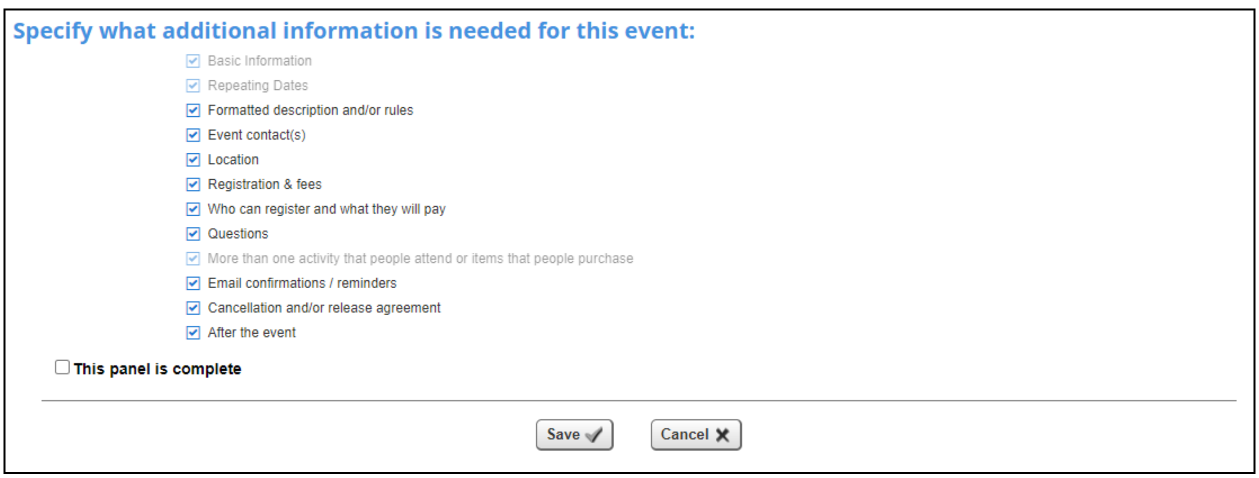
    - Link Properties
        - **Link Display Type** - Links can be represented in three ways, using text, a button or an image. If you select **Text** or **Button**, the next field prompts for the text to be used. If you select **Image**, the field is replaced by a button that displays the Image Selector pop-up window, where you can browse your Web Graphics library for images, or upload a new image.
        - **Target Window** - Select Same Window to open the link in the same window as the event. Select New Window to open the link in a new window or tab.
    - Select **Save** to save your changes and return to the Basic Info screen.

g. Start and Finish time -
    - **Date** - Select the calendar icon to display a pop-up date selector. Select the start and finish date.
    - **Display** - Select Display to display the start and finish time in the event details.

h. Repeating/Multiple Date Options
    - **This event repeats on multiple and/or non-consecutive dates** - If configuring a multiple date event, such as an eight-week course, see the Repeating Dates section. If this option is selected, the Finish date is removed from Basic Info. The final date of the event is configured on the Repeating Dates screen.
    - **Do not show on next day of calendar if event runs past midnight** - Select this option to only show the event on the start date on the calendar.
    - **Show only start and end date on calendar if event spans multiple days** - Select this option to show the event only on the start and end dates if the event spans more than two (2) days.

Step 2. Specify what additional information is needed for this event.

Additional information is added to the event in the pages of the Event Creation Wizard. Select the pages that contain information necessary for the event. In this example, we will leave all boxes checked.



- *Basic Information* - This is the current page. This page is required.
- *Repeating Dates* - If the event is a single-date event, this page cannot be selected and is greyed out. If the event is a multiple-date event, the option will be selected automatically.
- *Formatted description and/or rules* - Add a fully formatted description to the event, with formatted text, photos and links.
- *Event Coordinator(s)* - Select one or more members to serve as the contact(s) for the event.
- *Location* - Enter the event location.
- *Registration & fees* - Select registration options, and whether or not a fee is required for the event.

- *Who can register and what they will pay* - Determine who can register for the event, and what each registrant will pay.
- *Questions* - Ask registrants questions during registration.
- *More than one activity that people attend or items that people purchase* - If the event is a multiple-activity event, this page cannot be selected and is greyed out. If the event is a multiple-activity event, the option will be selected automatically.
- *Email confirmations/reminders* - Add additional information to the registration confirmation email, and/or determine when reminder emails are sent.
- *Cancellation and/or release agreement* - Configure the cancellation policy for the event, and/or the release agreement.
- *After the event* - Link users to a custom page or photo album dedicated to the event.

Event Creation Wizard Pages
If you select a page to add information to, but decide later you don't need the page you can remove it from the wizard. If you don't choose to add a specific page, for example Location, but later decide you need it, you can add the page back by visiting the Basic Info screen and checking the box.

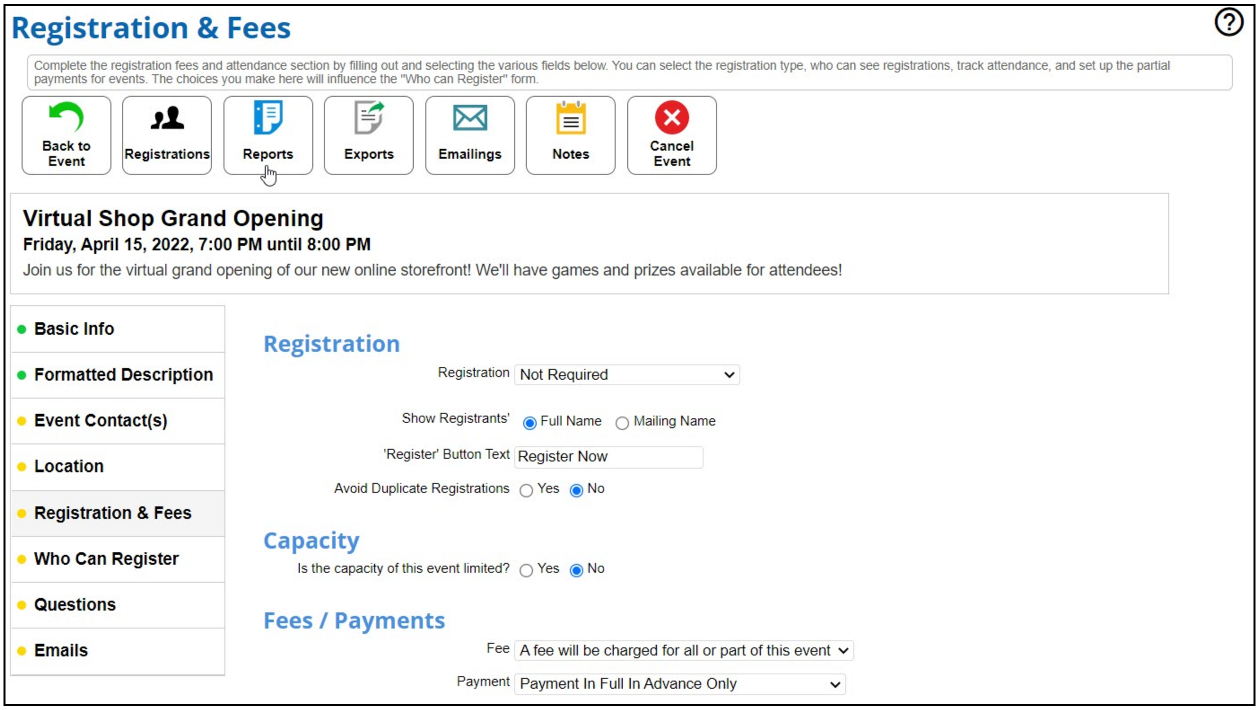
Default Event Creation Wizard Pages
If you find that you tend to use the same pages most of the time, you can set pages to be selected and unselected automatically in Configure > Event Defaults. For example, if you almost never ask registrants questions, you might want the Questions page unchecked by default. You can still add the page to the Wizard, however the option will be unchecked by default.

Step 3. Select **This panel is complete to complete** the Basic Info page. Select **Save** to save your changes and navigate to the *Event Admin Screen*.

Event Admin Screen

The Event Admin Screen is where you will access each page in the Event Creation Wizard. The Event Admin Screen has three (3) sections:

- Builder Status Menu - Select the **menu option** to view details for that section. A green dot indicates the panel has been marked as Complete. The menu appears on each page in the Event Creation Wizard, to allow you to easily navigate between pages.
- Editing Area- Select the edit icon at the top left corner to edit the information for that section.
- Admin Icons - The toolbox of icons at the top right of the screen gives you more administrative options, such as viewing registrations, running reports and configuring blast emails for the event.



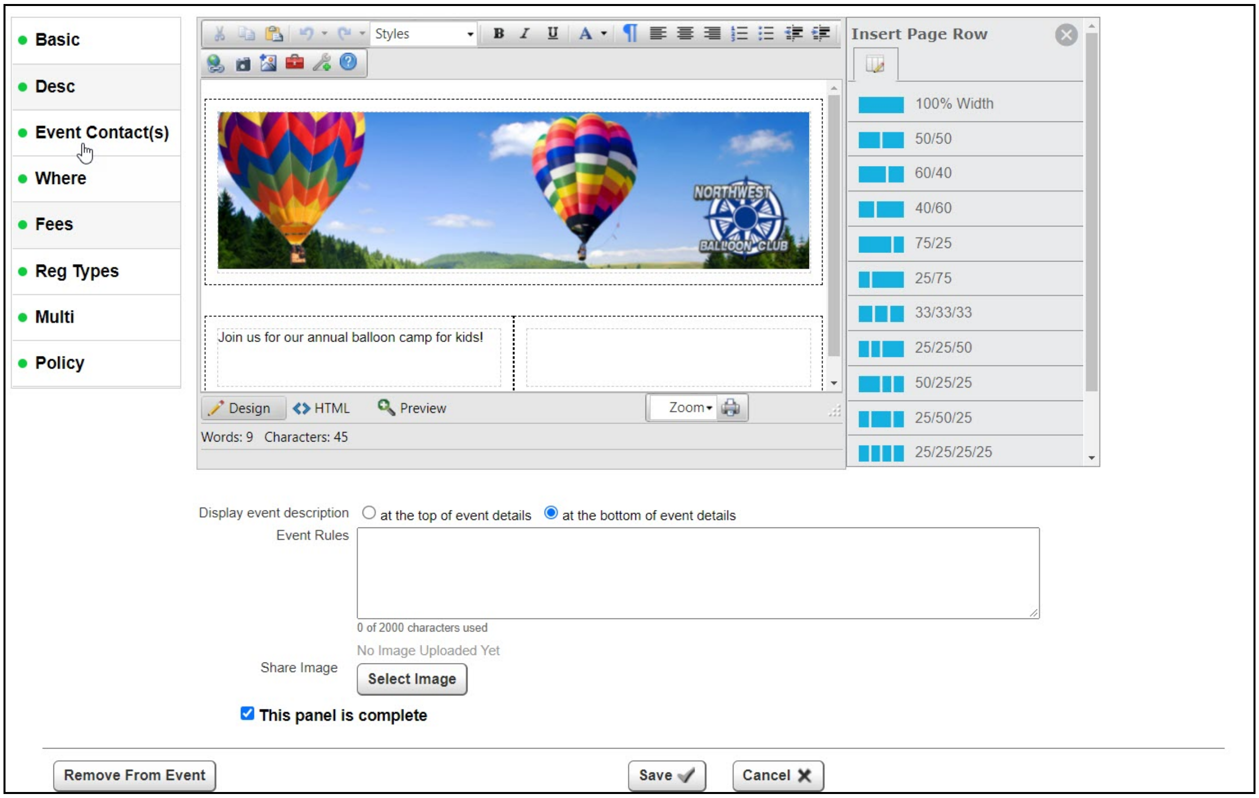
Step 4. Select the **Formatted Description** option on the Builder Status Menu, then select the **Edit** icon in the panel.

Part 3. Formatted Description and/or Rules

The Formatted Description screen is where you will configure the formatted description for your event using the Content Editor.

The Formatted Description screen has two (2) sections:

- Content Editor - Use the Content Editor to add a description with formatted text, photos and links.
- Event Rules - Add text for special event rules to display with the description.



Event Creation Wizard Pages
If you select a page to add information to, but decide later you don't need the page you can remove it from the wizard by selecting the **Remove From Event** button that appears at the bottom of each page in the wizard.

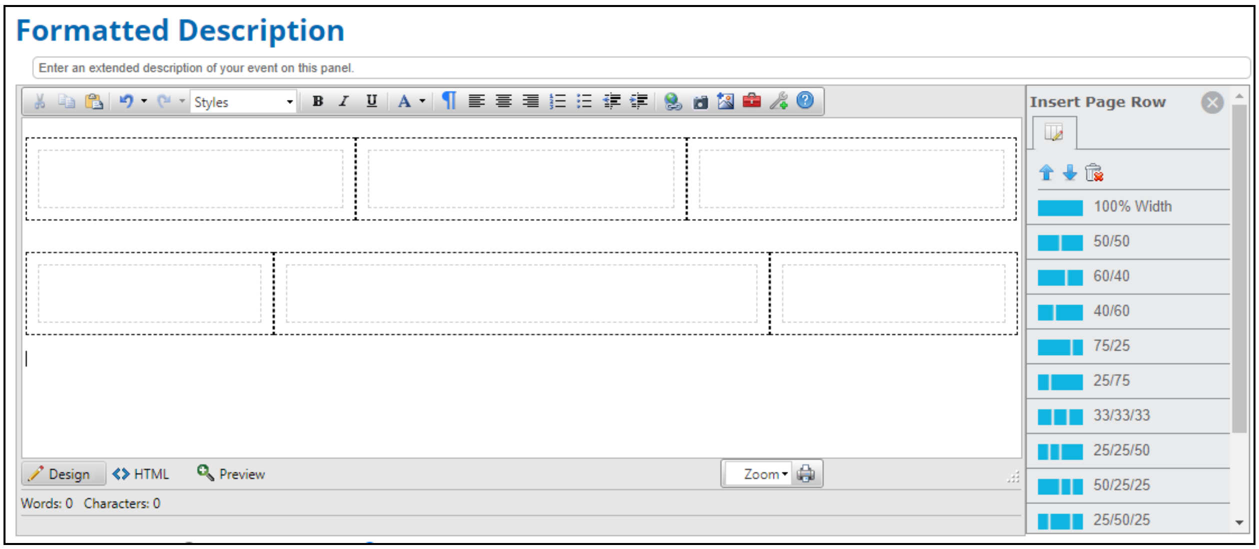
Adding a Formatted Description

Use the Content Editor to add a formatted description to your event. In this example, we'll add a photo, description of event activities and rules for the event. For more information on working with the Content Editor, go here.

Step 1. Build the Outline

Page Rows ensure the description displays properly on all screen sizes and contain cells which will hold all the formatted description content.

Place the cursor in the editing area of the Content Editor, then select the desired **Page Row option** from the *Insert Page Row panel*. In this example, we inserted a *33/33/33* option followed by a *25/50/25* option.



Making Changes to Page Rows
If you want to change the order of the Page Rows you selected or delete a row, select the row and use the  icons to move the row up or down, or delete the row.

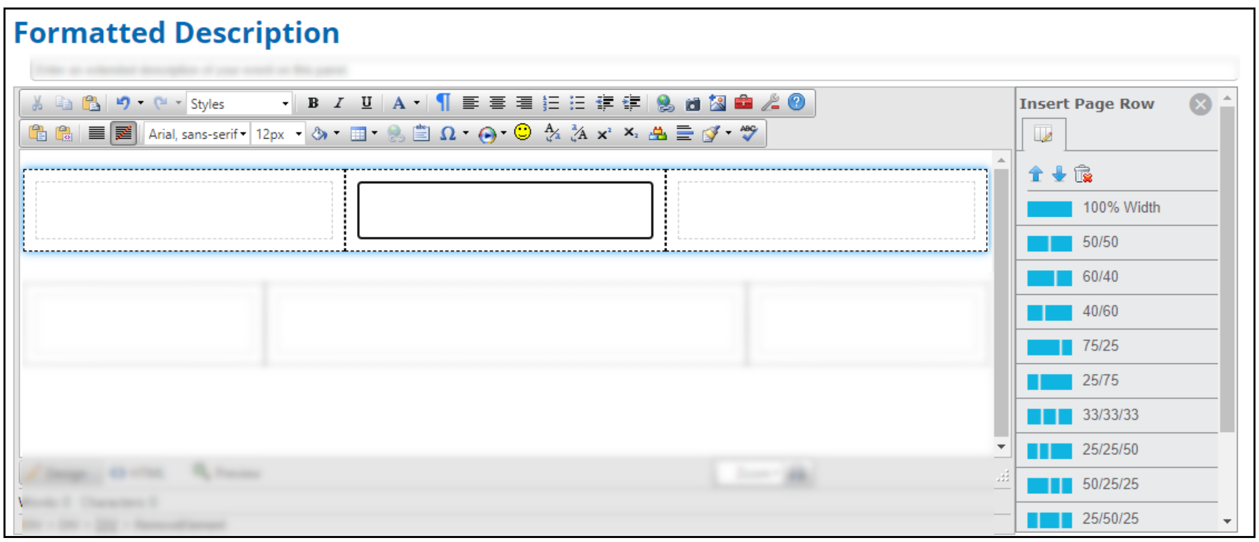
Step 2. Add Content to Page Row Cells

Use the tools in the Content Editor to add formatted text, photos, links and more to the formatted description. In this example, we will add an image and formatted text.

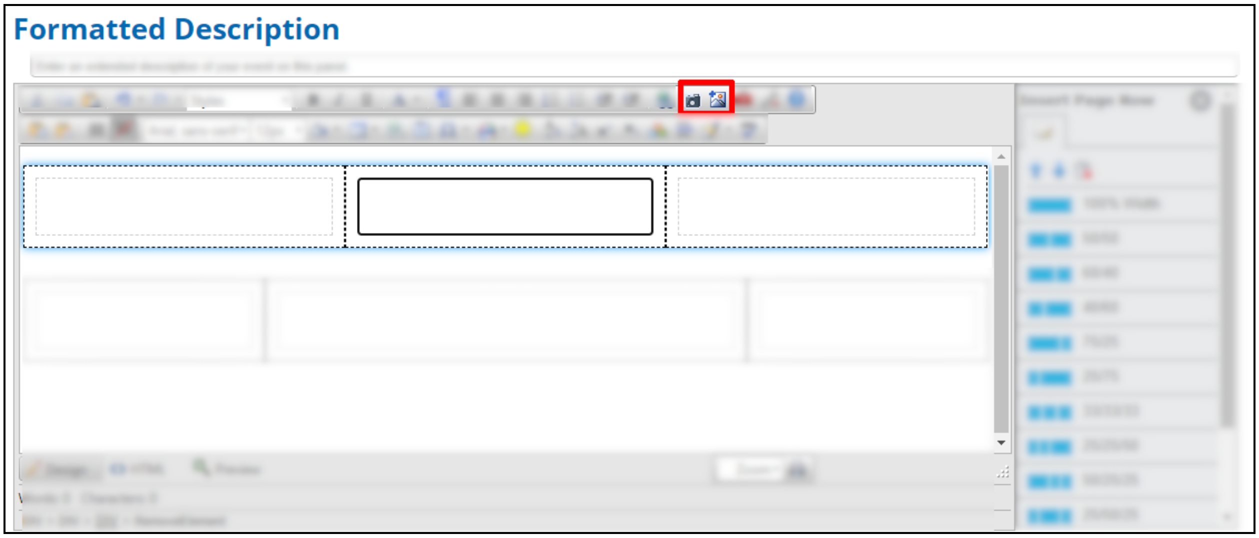
Using the Content Editor Tools
Remember to click the wrench icon in the Advanced Content Editor to display the full toolbar. Once you're done adding Page Rows, or if you want to remove the Page Row menu from your view, you can close the menu. To see the Page Row menu again, click the red briefcase.

Using the Content Editor and Page Rows
Page Rows ensure the content you place in the Content Editor displays properly on any screen or device, even mobile devices. Avoid typing or adding photos directly into the Content Editor and only add content to Page Rows.

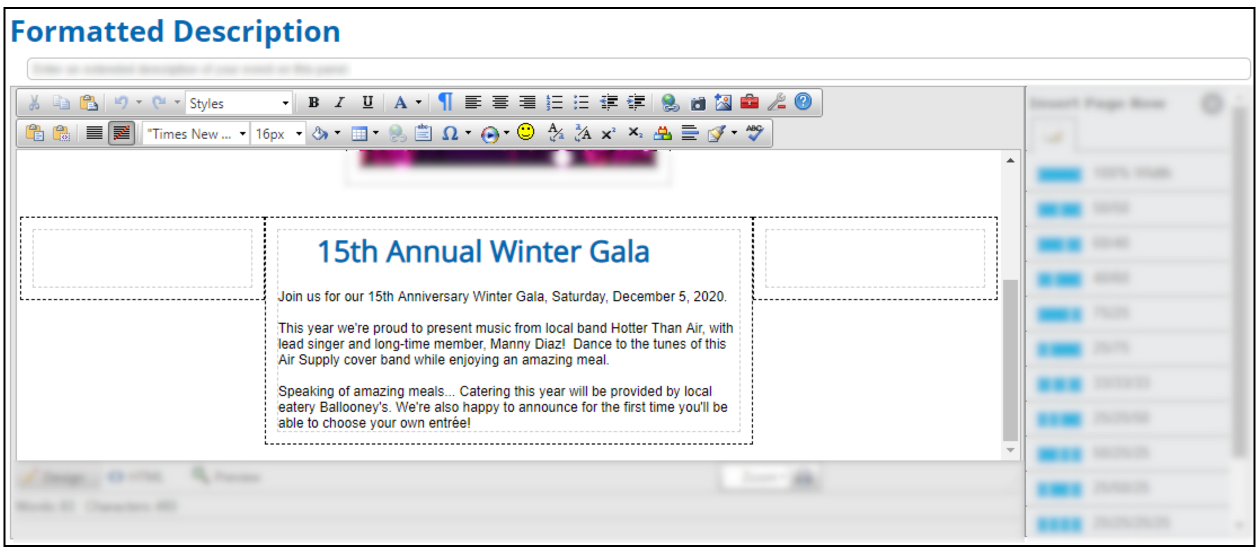
a. Adding an Image
   Select the **cell** for the image. The selected row will have a blue border, and the selected cell will have a solid black border.



b. Select the **Photos** icon browse images saved to Photos, or the **Images** icon to browse images saved to Web Graphics, or to upload a new image.

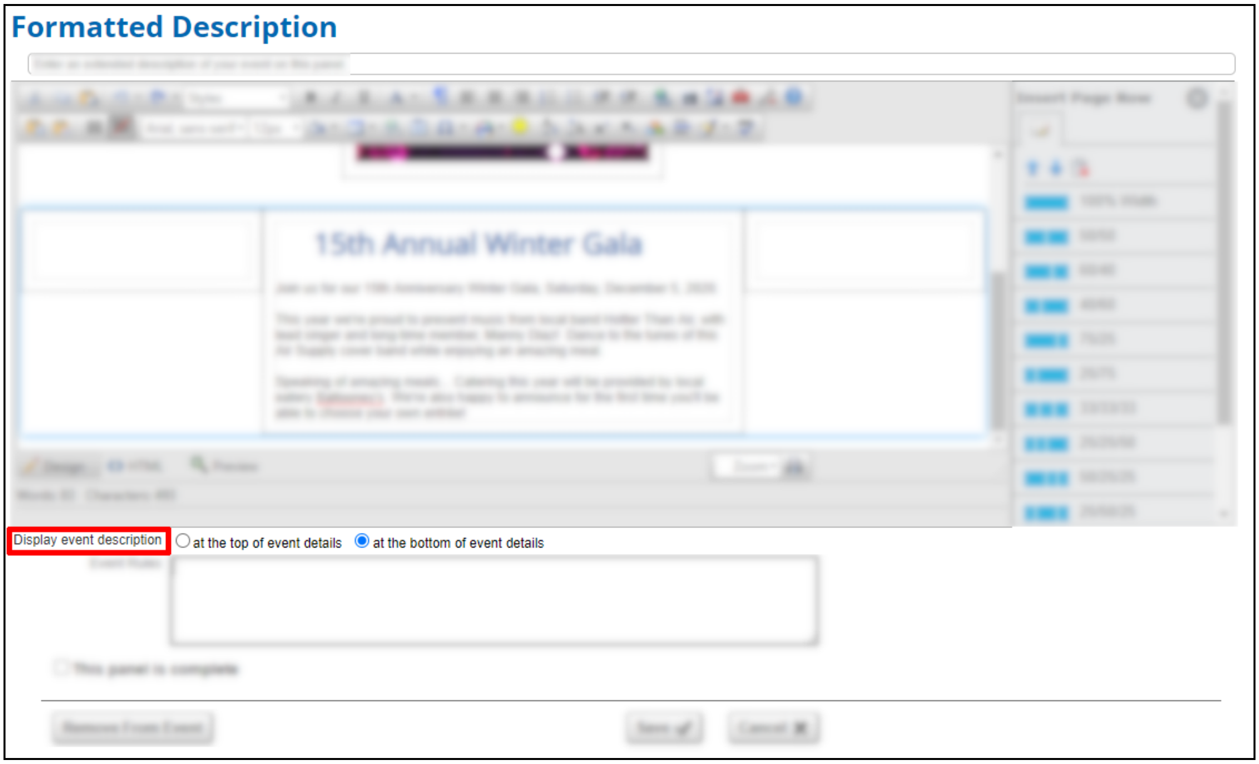


c. Adding Text
Select the **cell** for the text. Begin typing in the cell, using the text formatting options in the Content Editor.



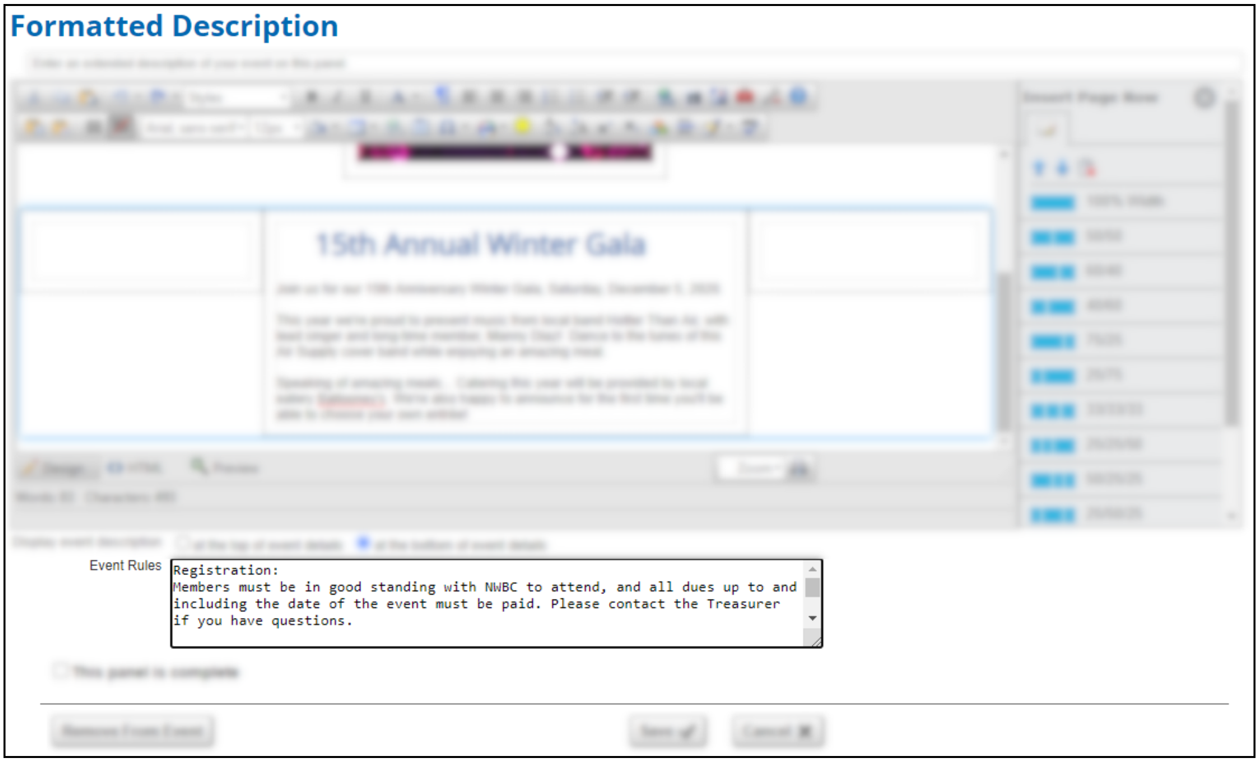
d. Display Event Description
Select **at the top of event details** to show the description before the name, date and location of the event. Select **at the bottom of event details** to show the description after the name, date and location

of the event.



Step 3. (Optional) Add Event Rules

Enter the **rules** for the event or venue . These rules will display on the event page above the event description.



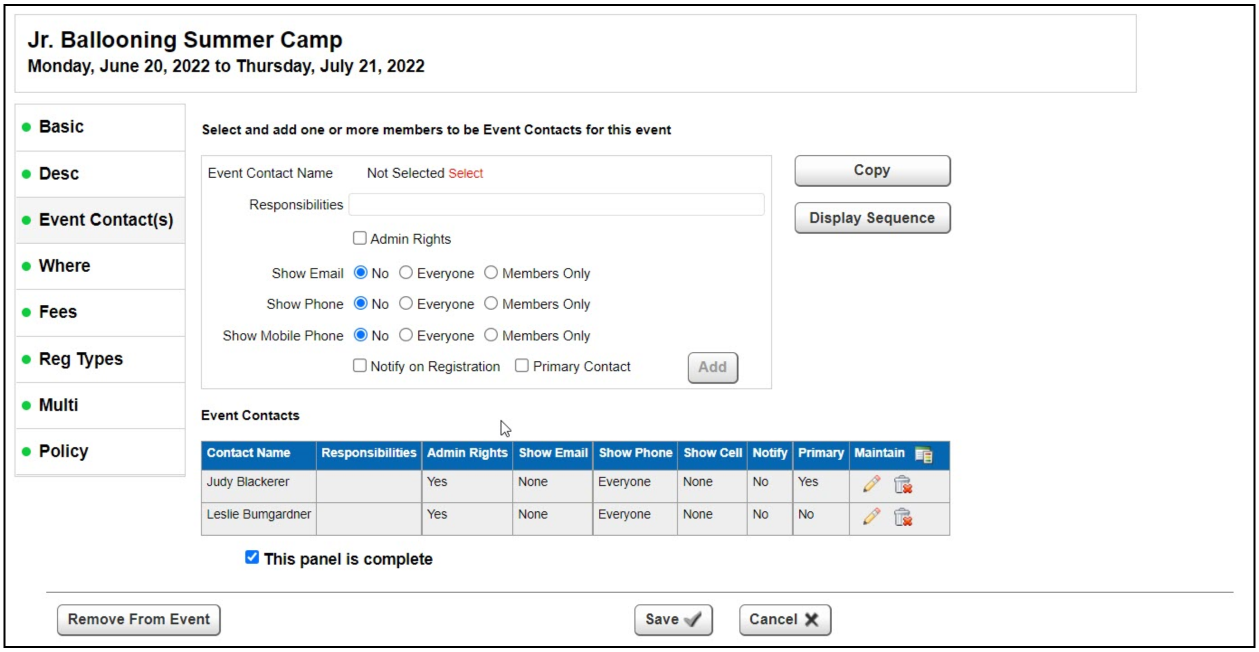
Step 4. Select **This panel is complete**, then **Save** to save your changes and return to the Event Admin screen.

Step 5. Navigate to Event Coordinator(s)

Select the **Event Contact** option on the Builder Status Menu, then select the **Edit** icon in the panel.

Part 4. Event Coordinators(s)

The Event Coordinators(s) screen is where you will designate the members to be contacted with event questions, or the members responsible for the event. You can add as many event coordinators as necessary.



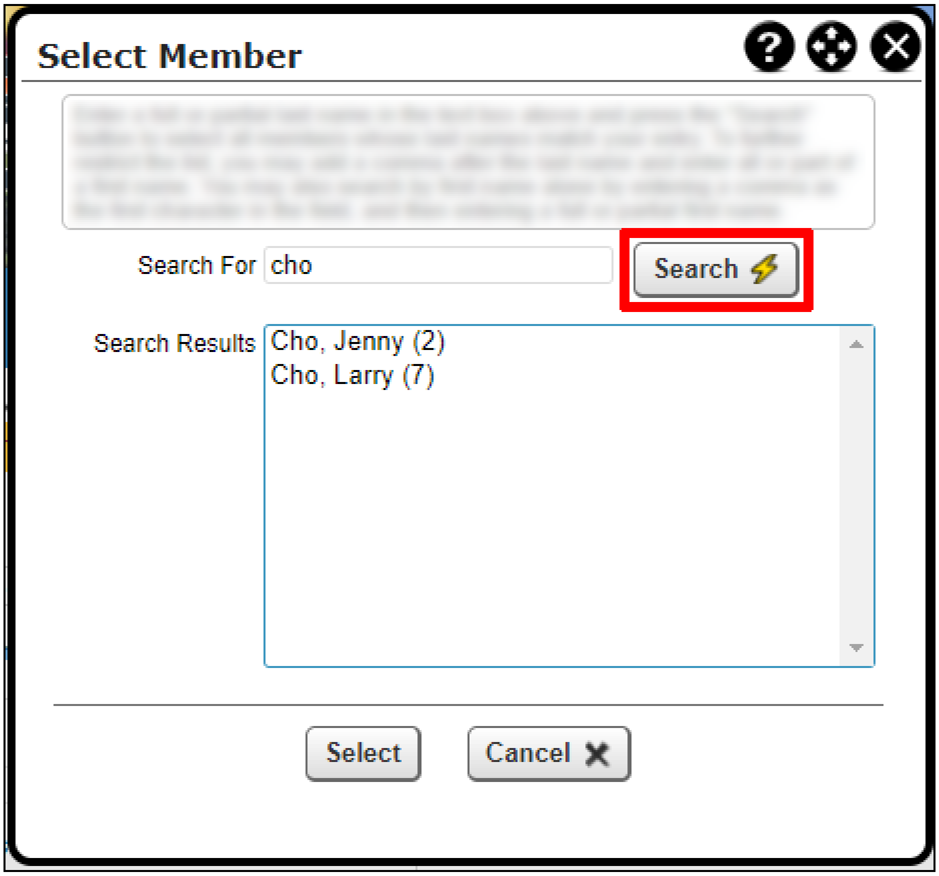
Default Event Coordiantors
If you find that you tend to designate the same coordinator most of the time, you can set a member as the default event coordinator in Configure > Event Defaults. You can still add additional coordinators and even remove the default coordinator in individual events.

Copying Event Coordinators
If you used the same list of event coordinators in another event, select the Copy button to import those contacts and their Event Coordinator settings into this event.

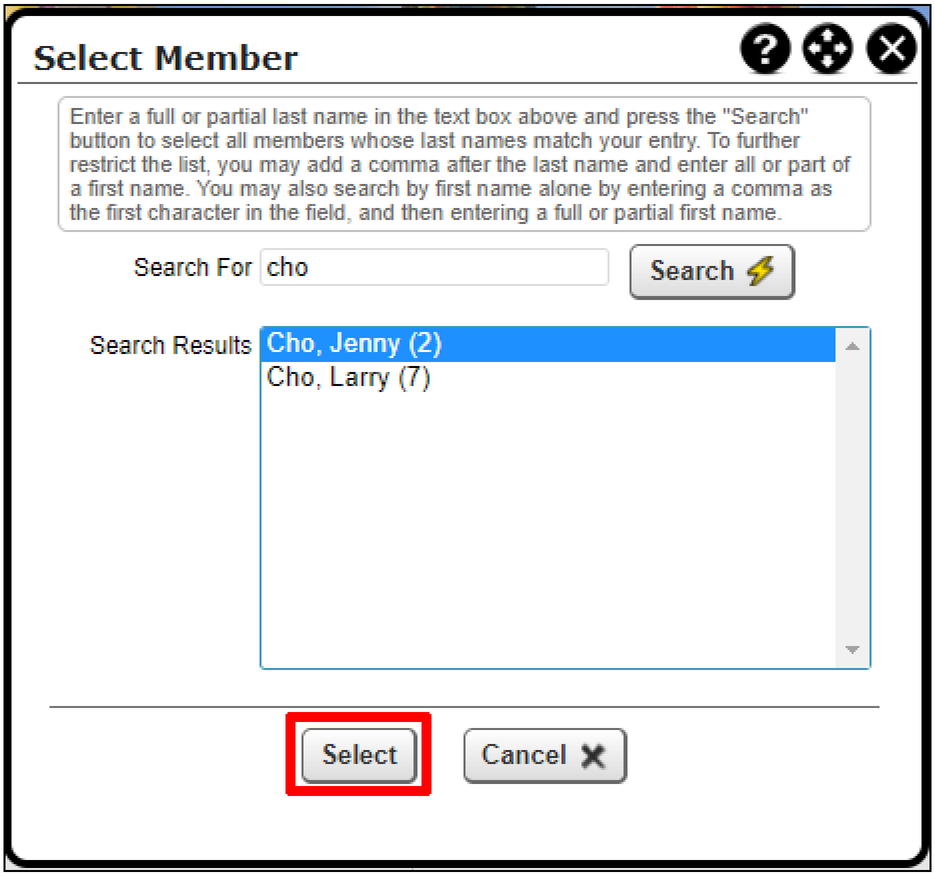
Add an Event Coordinator

Step 1. Coordinator Name

a. Select the **Select** link to choose a member from your database to list as the event coordinator.
b. Enter all or part of the member's **last name** and select **Search** to locate the member.

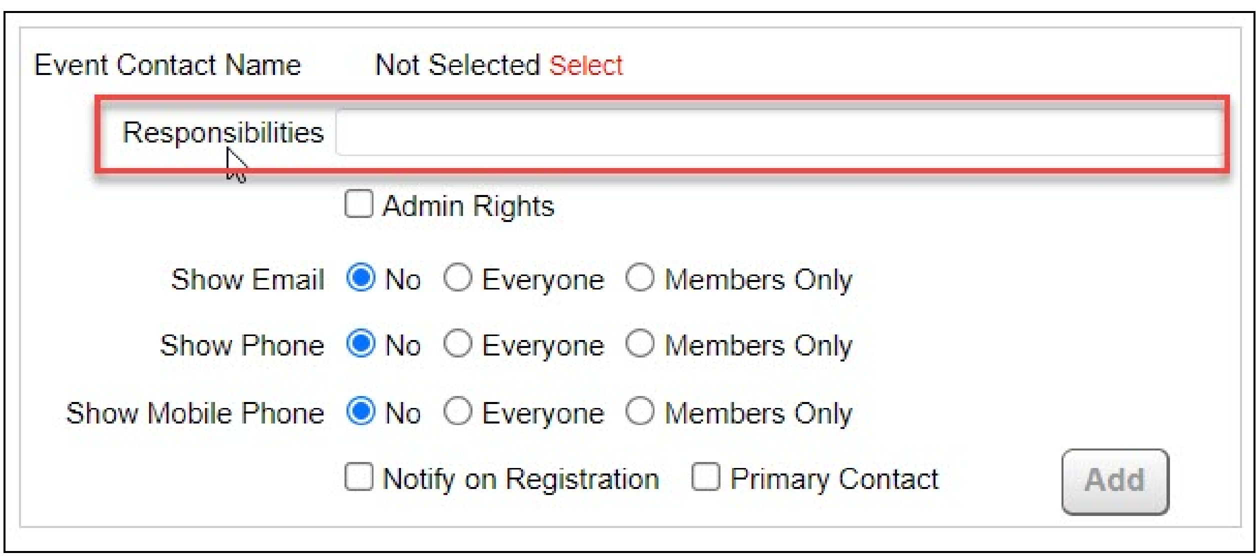


c. Select the **member** from the Search Results list and select the **Select** button to choose the member.



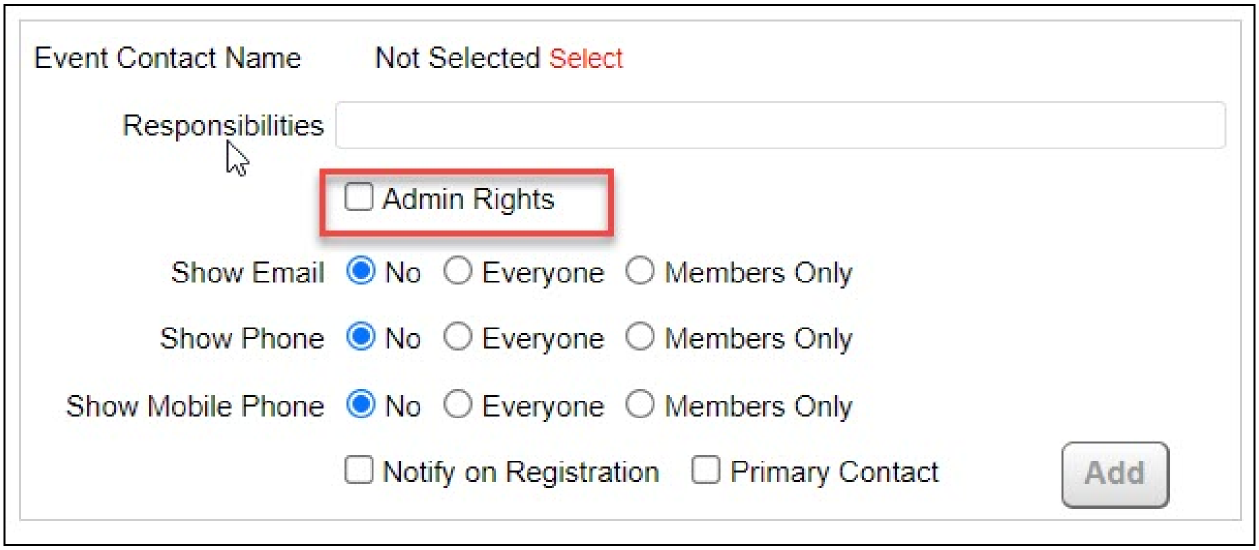
Step 2. (Optional) Responsibilities

Enter the **items** for which the member is responsible in the event.



Step 3. Admin Rights

Select the option to give the coordinator admin rights over the event, or leave the option unchecked to have the contact be listed on the event in name only.



Event Contacts and Admin Rights
If an event Contact or Coordinator is given admin rights over the event, they will be able to make changes to the event using these same panels, access reports, and manage registrations. Event Coordinators or Contacts will not have the ability to send blast emails through the Event module without also having coordinator access to Blast Emailing. to keep the contact information hidden from view.

Step 4. Show Email, Phone, Mobile Phone

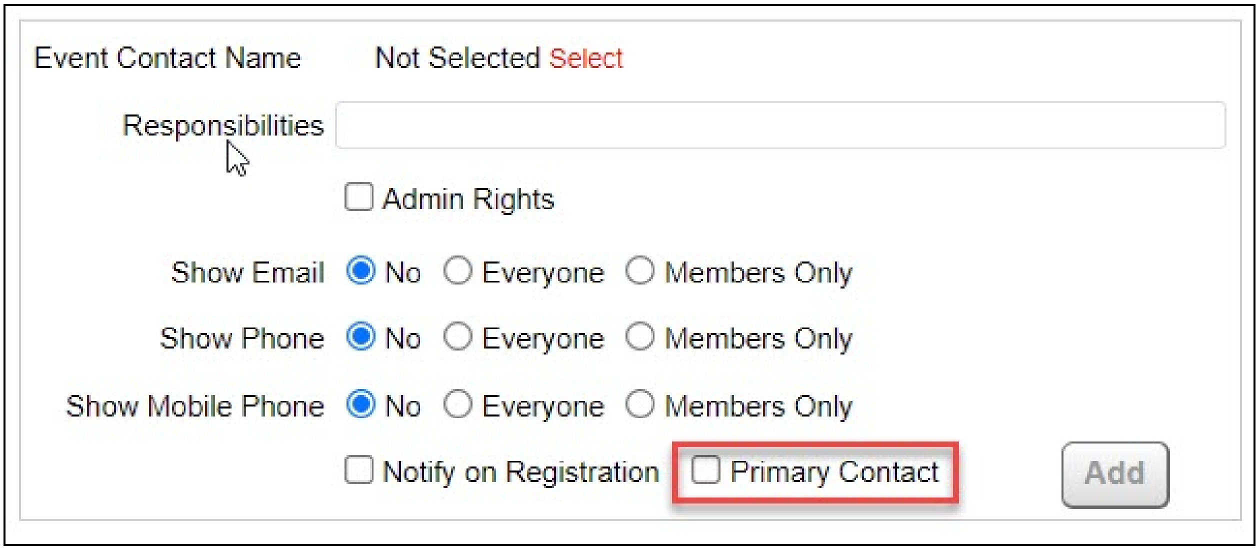
Select **No** to keep the contact information hidden from view. Select **Everyone** to allow both members and non-members to view the information. **Select Members Only** to allow only logged-in members to view the information.

Step 5. (Optional) Notify on Registration

Select **Notify on Registration** to send an automatic email to the coordinator every time someone registers for the event.

Step 6. (Optional) Primary Coordinator

Select **Primary Coordinator** to make this contact the primary coordinator, and have their contact information included on event registration confirmation emails sent to registrants.



Step 7. Select **Add** to add the coordinator to the list of event coordinators.

Step 8. (Optional) Repeat Steps 1-6 to add additional coordinators.

> *Display Sequence*
> Once you add your event coordinators, you can change the order in which they appear on the event page by selecting the Display Sequence button.

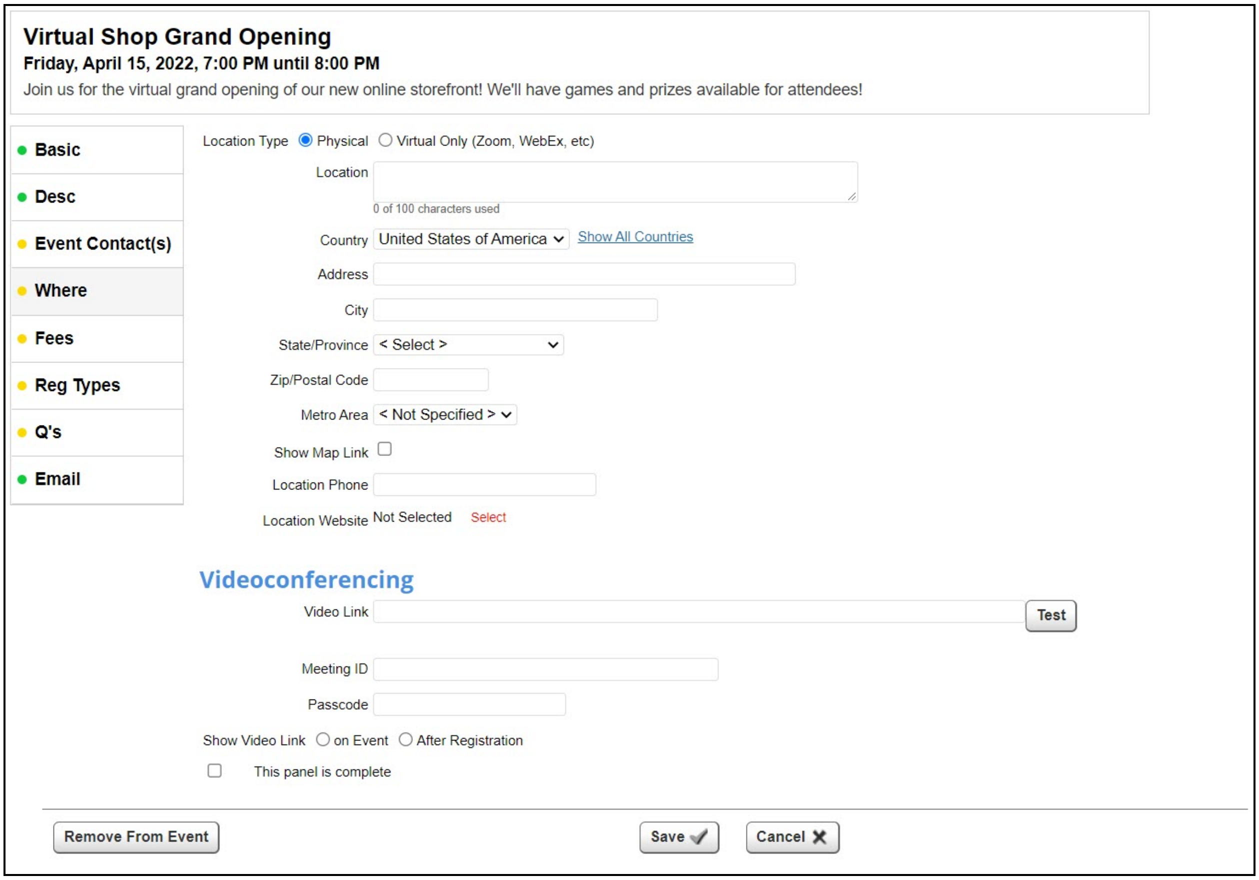
Step 9. Select **This panel is complete** and **Save** to save your changes and return to the Event Admin screen.

Step 10. Navigate to Location

Select the **Location** option on the Builder Status Menu, then select the **Edit** icon in the panel.

Part 5. Location

The Location screen is where you will enter the location information to display on the event page.

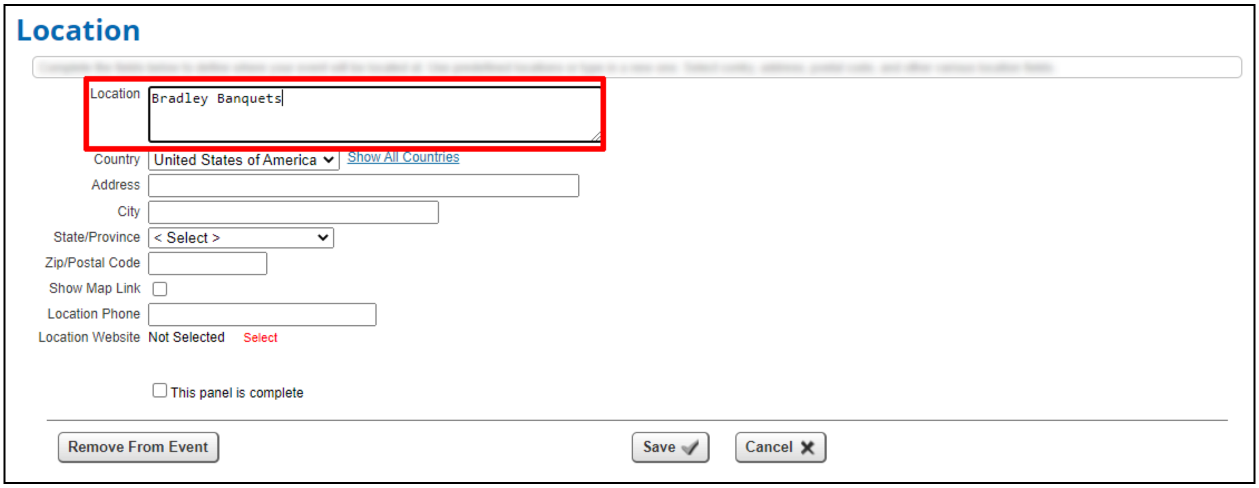


★ *Default Event Locations*
If you find that you tend to choose the same locations most of the time, you can create a list of frequently used locations in Configure > Locations. The list of locations will appear in a drop-down menu on the Location screen of the wizard. You can still enter a new location in individual events.

Add an Event Location

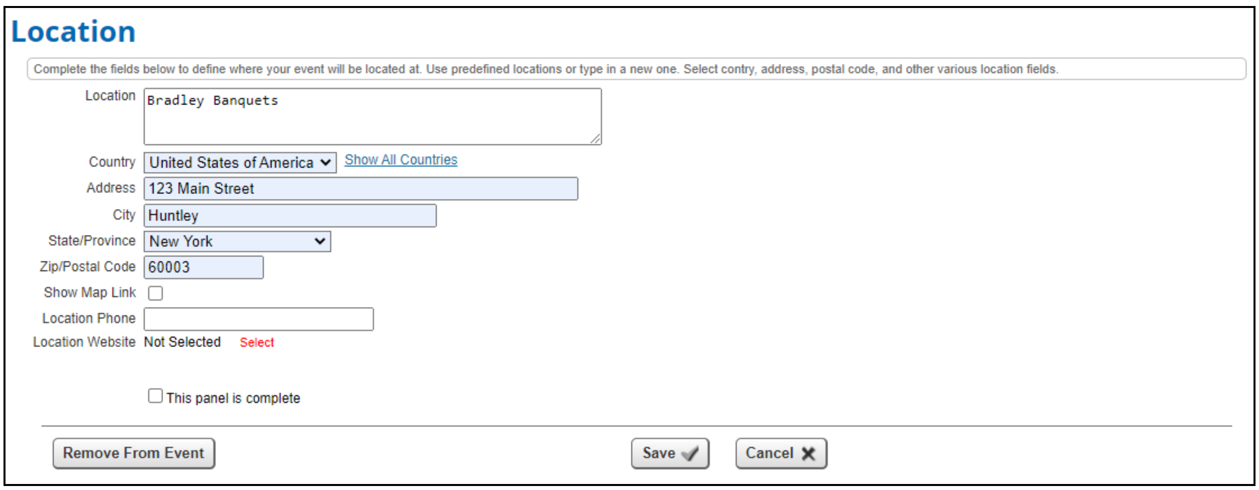
Step 1. Location

Choose whether the location is physical or virtual. If the location is physical or a combination of physical and virtual ("hybrid" events), follow Steps 2 - 5. If the location is virtual only, skip ahead to Step 5.



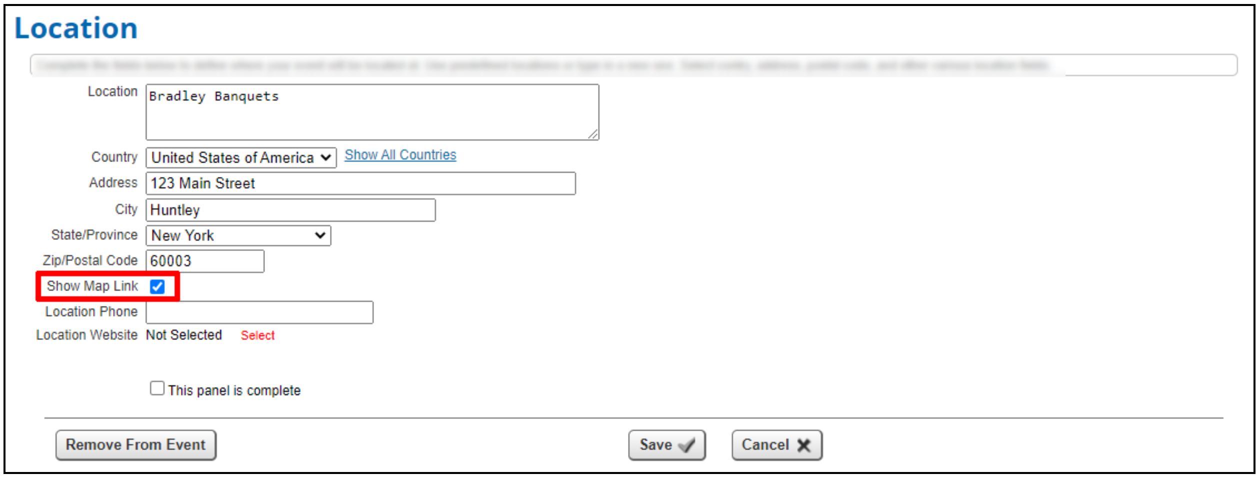
Step 2. Name and Address

Enter the **name** of the location. Enter the **address and phone number** of the event location.



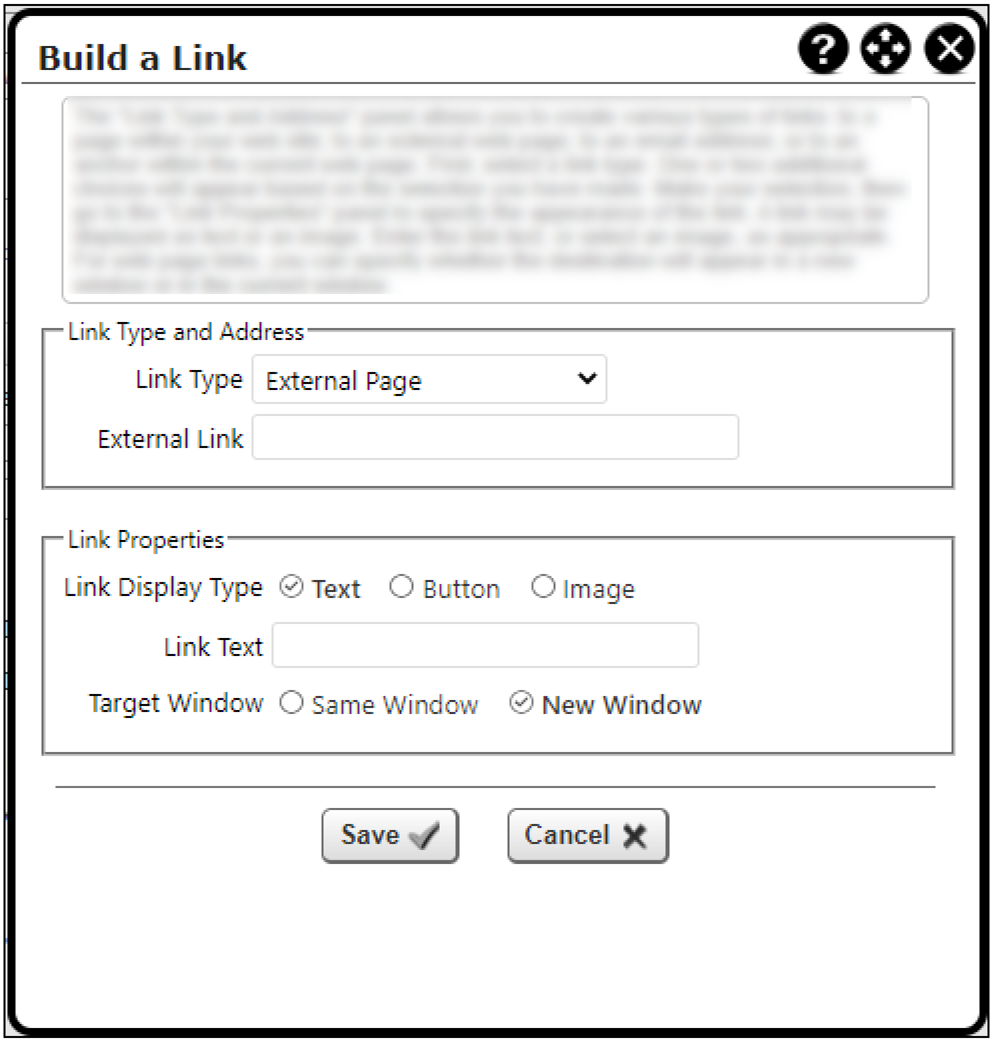
Step 3. Additional Location Information

a. Select **Show Map Link** to show a link to the map in Google Maps.



b. Select the **Select** link in Location Website to add a website for the location.

- Select the **Select** link to view the *Build a Link* pop-up dialog.



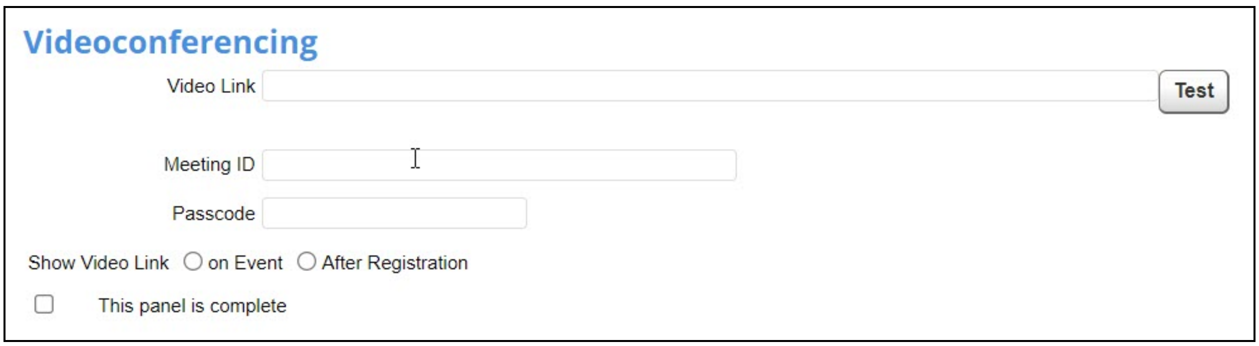
- Link Type and Address
  - **Custom Page** - Link to any custom pages you have created. The next field is a drop-down list of custom pages.
  - **Photo Album** - Link to a photo album, if Photo Albums is enabled. The next field is a drop-down list of categories; once you select a category, you can select a photo album within that category.
  - **Document** –Link to a document stored in your documents module, if the Document Library is enabled. The next field is a drop-down list of categories; once you select a category, you can select a document within that category.
  - **External Page** – This is a link to a web page stored on another website. The next field will prompt for the External URL, the address of the website you wish to go to.
  - **Email** – The next field will prompt for the Email Address.
  - **Blog** - Link to any blog, if the Blogs module is enabled. The next field is a drop-down list of available blogs.
  - **Volunteering Opportunity** - Link to any volunteering opportunity, if the Volunteering module is enabled. The next field is a drop-down list of available opportunities.

- **Add to Mailing List link** - Enter a link the allows non-members to add themselves to your organization's mailing list. These non-member contact are also automatically added to your non-member database.
- Link Properties
  - **Link Display Type** - Links can be represented in three ways, using text, a button or an image. If you select **Text** or **Button**, the next field prompts for the text to be used. If you select **Image**, the field is replaced by a button that displays the Image Selector pop-up window, where you can browse your Web Graphics library for images, or upload a new image.
  - **Target Window** - Select Same Window to open the link in the same window as the event. Select New Window to open the link in a new window or tab.
- Select **Save** to save your changes and return to the Location screen.

Step 4. Select **This panel is complete** and **Save** to save your changes and return to the Event Admin screen.

Step 5. Virtual Location

If your event will not have a virtual component, skip ahead to Step 6.



Enter the **link** used for your virtual event. If there is a **meeting ID or passcode**, enter those in the appropriate fields. Finally, determine **when the link should be sent**: on the day of the event, or after the user has registered.

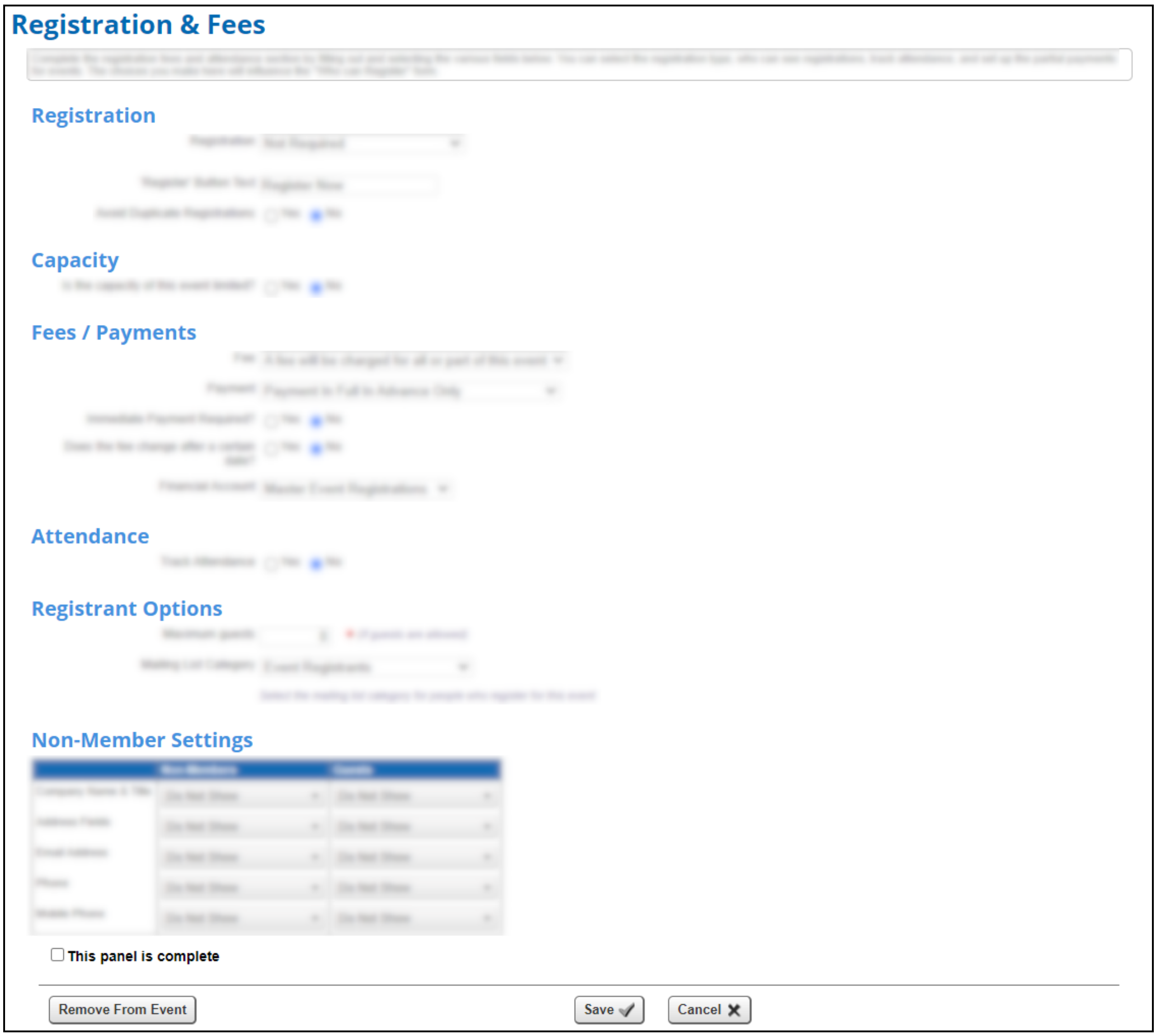
Step 6. Navigate to Registration & Fees

Select the **Registration and Fees** option on the Builder Status Menu, then select the **Edit** icon in the panel.

Part 6. Registration & Fees

The Registration & Fees screen is where you will select registration options, and whether or not a fee is required for the event. The screen has six (6) sections:

- Registration - Determine whether registration is required, and when users can register.
- Capacity - Determine the number of people allowed to register.
- Fees/Payments - Decide if a fee applies to the event.
- Attendance - Decide if attendance should be recorded for the event.
- Registrant Options - Determine the number of guests a registrant may bring.
- Non-Member Settings - Determine the data collected from non-member registrants.

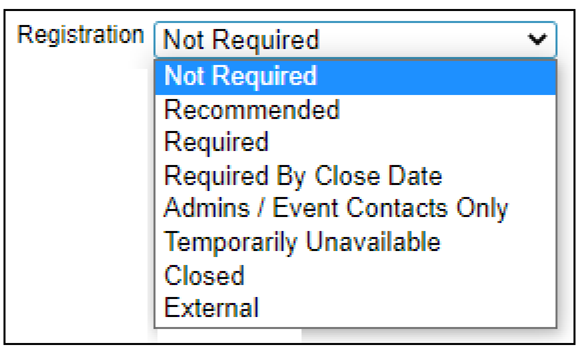


Default Registration Options
If you find that you tend to choose the registration settings most of the time, you can configure those settings in Configure > Event Defaults. You can still configure the registration settings differently in individual events.

Configuring Registration Settings

Step 1. Registration

a. Registration - Select the appropriate option:
   - **Not Required** - Users will not see a button to register and the event will note that registration is not required.
   - **Recommended** - Users will see a registration button, however registration is not required.
   - **Required** - Users will see a registration button and registration will be required to attend the event. Optionally, select a future date and time registration opens.
   - **Required By Close Date** - Users will see a button and registration will be open until the specified date and time. Select the registration close date and time, and optionally the open date and time.
   - **Admin/Event Coordinators Only** - Only administrators, event calendar coordinators and event coordinators can register users for this event. Users (logged-in members or non-members) cannot register themselves.
   - **Temporarily Unavailable** - Users see a note that registration is temporarily unavailable.
   - **Closed** - Users see a note that registration has closed.
   - **External** - A link button is displayed and users can select it to navigate to another website to register for the event. Use the Build a Link tool to add the appropriate link.



b. Registrant List Visibility - Select the appropriate option:
   - **None** - The list of registrants will only be visible to administrators and event coordinators.
   - **Public** - The list of registrants will be visible to members and non-members.
   - **Members Only** - The list of registrants will only be visible to logged-in members.

c. Register Button Text - Enter the **text** to be displayed on the button users will select to register for the event.

d. Avoid Duplicate Registrations - Select the appropriate option:
   - **Yes** - If a *logged-in member* is registering, the system will check to see if the member has registered for the same event previously and prevent the member from registering again. If a

non-member is registering, the system will check the non-members email address and last name, If both the non-member email address and last name match, the system will prevent the non-member from registering again.

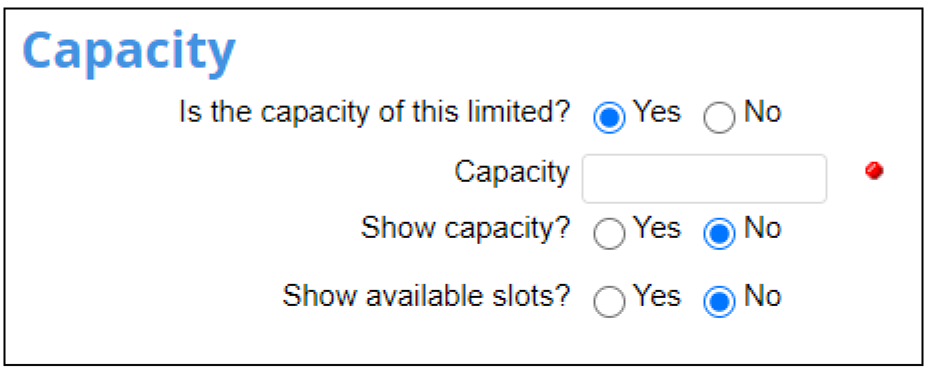
- **No** - Any member or non-member can register for the event more than once.

Duplicate Registrations

Avoiding duplicate registrations might seem obvious, but if you want to allow users to register each other for an event, select **No**. The system will still warn the member or non-member that they have already registered, but they can still go through the process to register a friend. For example, Joe and Sue are members and Joe mentions to Sue that he registered for an event with a limited capacity. Sue isn't able to register right away, so she asks Joe to register her on her behalf.

Configuring Capacity Settings

Step 2. Capacity



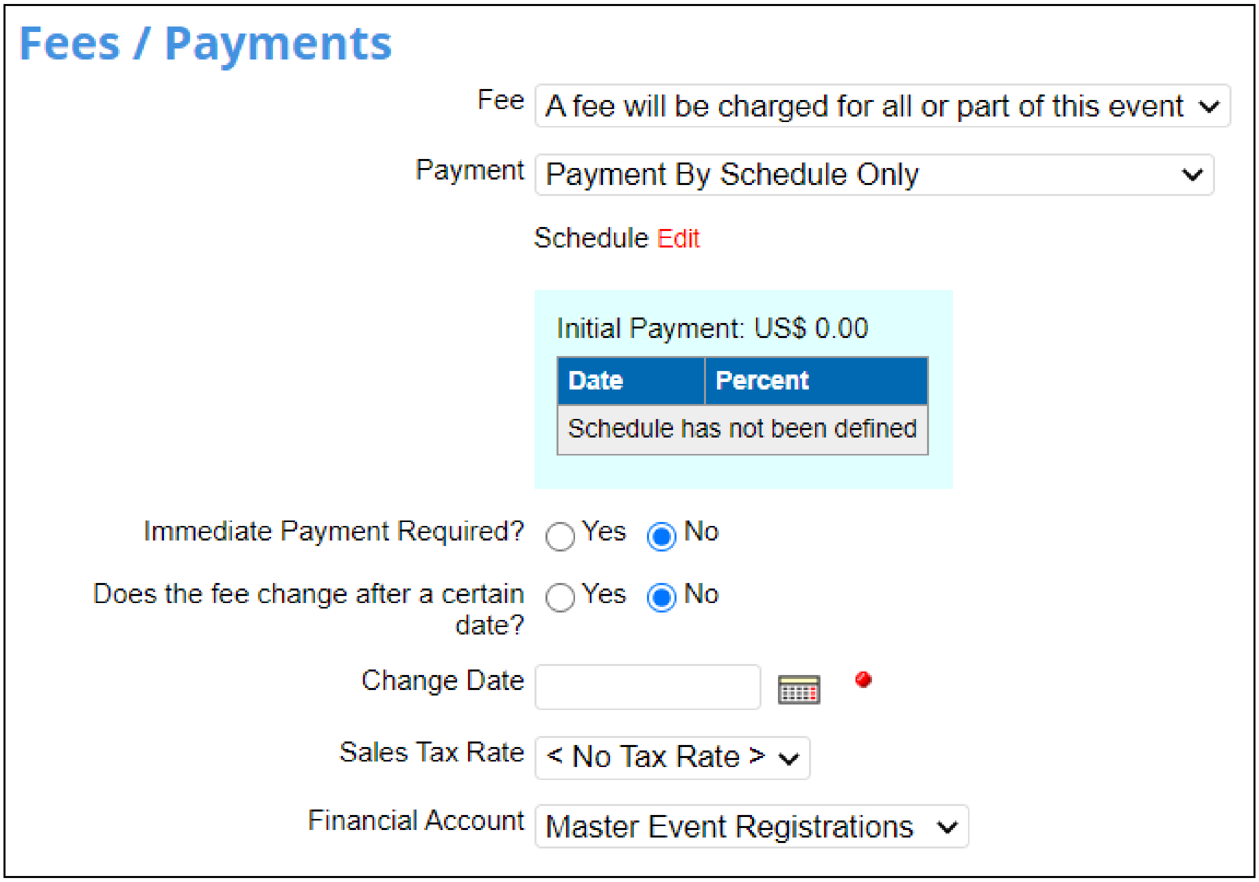
a. Is capacity of the event limited? - Select the appropriate option.
   - **Yes** - The event will allow users to register until capacity is reached.
     - Capacity - Enter the **capacity** of the event.
     - Show capacity - Show users the **maximum number** of attendees that can attend the event.
     - Show available slots - Show users how many **spots are left** for registration.
   - **No** - The event will allow users to register until the event has concluded.

Event Waitlist

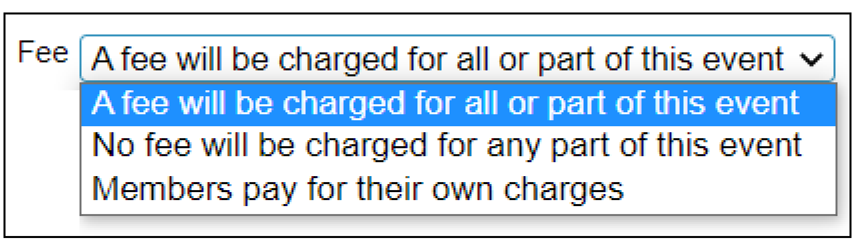
If you set event registration to either Recommended, Required, or Required by Close Date and you set a registrant capacity, you can enable a Waitlist for the event. See the Waitlist section at the end of this guide for instructions.

Configuring Fees and Payments

Step 3. Fees/Payments

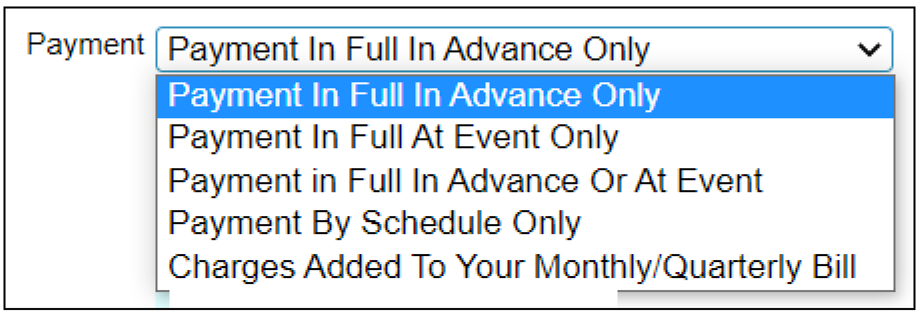


a. Fee - Select the appropriate option:
- **A fee will be charged for all or part of this event** - To attend the event, users must pay a fee.
- **No fee will be charged for any part of this event** - The event is free to attend.
- **Members pay for their own charges** - The event is free, but attendees might pay for something at the event on their own.



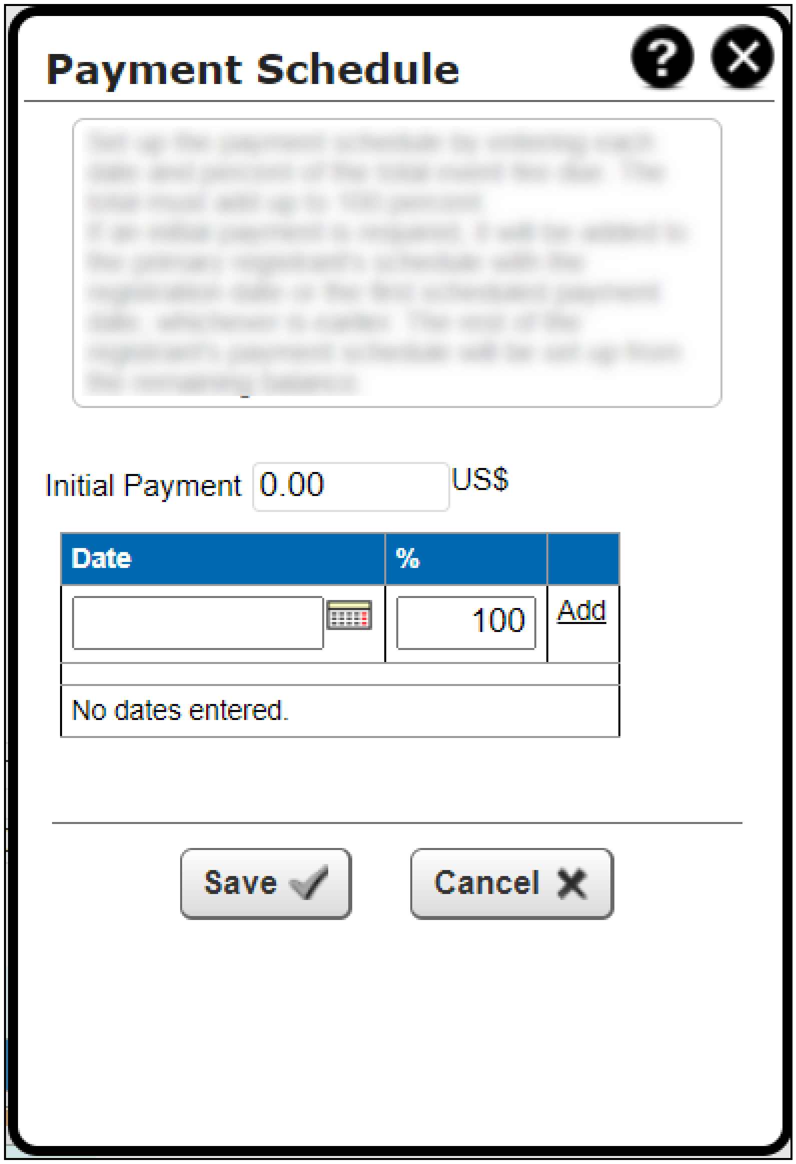
Members pay for their own charges
Some events or social outings might technically be free to attend, but stating members are expected to pay for their own charges lets members and non-members know that they might need to purchase something at the event. For example, if your organization hosts a networking event at a bar, attending the event might be free, but attendees would pay for their own drinks.

b. Payment - Select the appropriate option:
   - **Payment In Full In Advance Only** - In order to attend the event, attendees may only pay in advance.
   - **Payment In Full In At Event Only** - In order to attend the event, attendees may only pay at the event.
   - **Payment In Full In Advance or At Event** - In order to attend the event, attendees can pay either in advance or at the event.
   - **Payment By Schedule Only** - In order to attend the event, attendees must pay specific amounts on a schedule. When you select this option, a new *Schedule* field appears.



- Select **Edit** to edit the payment schedule.
- (Optional) Initial Payment - Enter the **initial payment** required. This payment is due when the attendee registers, followed by the schedule of payments configured in the next step.
- In the *payment schedule grid*, select the **date** the first payment is due. Enter the **percentage** of the total payment that is due on that date. Select **Add** to add the configured payment to the schedule.

- **Repeat** the previous step until the TOTAL % Scheduled equals 100%.



Scheduled Payments
When attendees register for an event with a payment schedule, they will receive a reminder email letting them know they have an upcoming payment due.

⚠

Charges Added to Your Monthly/Quarterly Bill
This option was added for a club which needed to bill members monthly; avoid selecting this option.

c. Immediate Payment Required? - This option will only appear if *Payment In Full In Advance Only* was selected. Select the appropriate option:
    - **Yes** - Registrants will be required to pay immediately to hold their spot at the event. A pop-up notification will appear on the event registration payment screen warning the user they have 30 minutes to complete payment.
    - **No** - Registrants can wait to pay for the event and exit the payment screen without giving up their registration spot.

⚠

Immediate Payment and Alternative Payment Methods
If you want to allow registrants to pay with cash or a check, select **No** to allow registrants to send in payment without sacrificing their registration spot.

d. Does the fee change after a certain date? - Select the appropriate option:
    - **Yes** - Use this to configure "Early Bird" pricing for the event. Select the **date** the fee change goes into effect.
    - **No** - The fee remains the same regardless of when the user registers.

e. (Optional) Sales Tax Rate - If tax must be charged for the event, select the appropriate **tax rate**. Note the option may be labeled differently depending on the country where your organization is based.

★
Tax Rates
Configure tax rates for transactions on your website in Control Panel > Money > Tax Rates. Depending on the country in which your organization resides, the option may be labeled Sales Tax, GST, VAT, etc.

f. Financial Account - The default financial account for events is **Master Event Registrations**. If another financial account applies, select the appropriate option.

Financial Accounts
Financial Accounts are different from your bank account listed with ClubExpress and are used to categorize charges on ClubExpress reports. Categorizing charges across your website can be a helpful financial reporting tool. For example, ten members each pay $15 to attend various events hosted by your organization ($150). Five of those members registered for your most popular event of the year, your Yearly Training Seminar ($75). On your bank statement, you will only see a deposit of $150. If you create a separate financial account called Yearly Training Seminar, you could run a report to show that $75 of the $225 deposit came from members signing up for the seminar.
With our QuickBooks® integration, ClubExpress Financial Accounts allow you to link to the financial accounts in your own accounting system.

Configuring Attendance Tracking

Step 4. Attendance

Track Attendance - Select the appropriate option:

- **Yes** - Administrators and event coordinators will have the option to track which of the registrants attended the event. Attendees who did not register in advance can also be registered and marked attended simultaneously at the event.
- **No** - Administrators and event coordinators will not be able to mark attendance for the event.

Configuring Registration Options

Step 5. Registrant Options

a. Maximum Guests - Enter the maximum number of **guests** a user may register for the event.
b. Mailing List Category - The default mailing list category for events is **Event Registrants**. If another mailing list category applies, select the appropriate option.

Mailing List Categories

Mailing list categories are a great way to categorize members and non-members. Sometimes this is done automatically, such as when someone registers for an event that has a specific category assigned to it. It can also be done manually, such as when you want to assign someone to a “Press” category you have created to track members of the press. Both members and non-members can have multiple categories assigned to them. For example, a member might have both the volunteer and donor categories applied to them because of past volunteer work and donations.

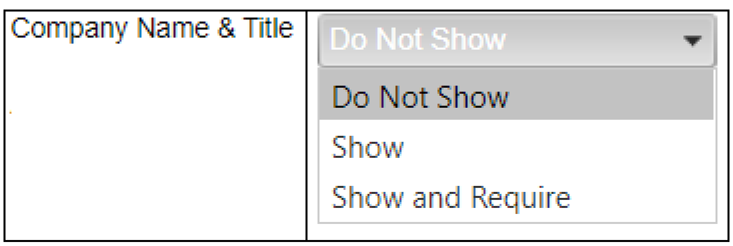
Configuring Non-Member Guest Data Collection

Step 6. Non-Member Guest Settings

If a non-member registers for an event, or a member or non-member registers a guest for an event, the non-member and/or guest contact information is saved to your non-member contact list and can be accessed in the People Manager.

For each contact item, select the collection method.

- **Do Not Show** - The field will not be shown on the registration screen.
- **Show** - The field will be shown on the registration screen.
- **Show and Require** - The field will be shown on the registration screen and will be required to register.



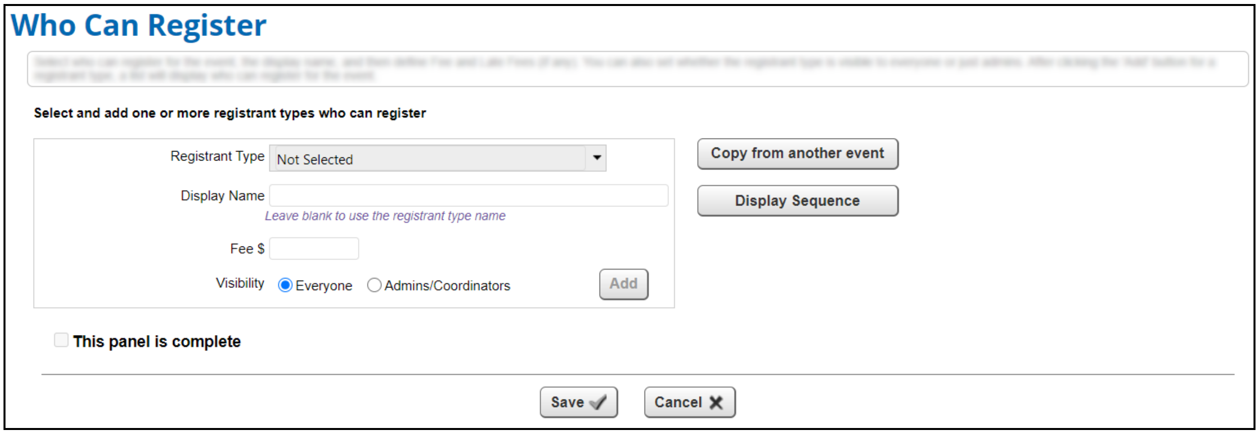
Step 7. Select **This panel is complete**, then **Save** to save your changes and return to the Event Admin screen.

Step 8. Navigate to Who Can Register

Select the **Who Can Register** option on the Builder Status Menu, then select the **Edit** icon in the panel.

Part 7. Who Can Register

The Who Can Register screen is where you will determine who can register for the event and what each registrant type will pay.



Adding a Registrant Type and Fees

Step 1. Registrant Type

Select the appropriate option. If a fee is required for the event, each registrant type selected can pay a different fee.

> **Example:** Members of the Event Planning Committee might pay $10, active members $20 and non-members $30.

- **Everyone** - Any member or non-member can register for the event. If a fee is required, both members and non-members will pay the same fee.
- **Any Non-Member** - Any non-member can register for the event. If a fee is entered, it will apply to only this registrant type.
- **User of a specific mailing list category** - Any member or non-member on a selected mailing list category can register for the event. If a fee is entered, it will apply to only this registrant type. Select the mailing list category from the Category drop-down list.
- **Non-Member Guest (another non-member)** - A non-member registering can register a non-member guest. If a fee is entered, it will apply to only this registrant type.
- **Active Members** - Any active member can register for this event. If a fee is entered, it will apply to only this registrant type.
- **Members by selected type** - Any member that is a selected member type can register for the event. If a fee is entered, it will apply to only this registrant type. Select the member type from the Member Type drop-down list.

- **Members of a selected committee** - Any member of a selected committee can register for the event. If a fee is entered, it will apply to only this registrant type. Select the committee from the Committee drop-down list.
- **Members of a selected interest group** - Any member having a selected interest can register for the event. If a fee is entered, it will apply to only this registrant type. Select the interest from the Interests drop-down list.
- **Member Guest – Another Person in your Membership** - A member registering can register another person in his or her membership (a secondary or tertiary member). If a fee is entered, it will apply to only this registrant type.
- **Member Guest – another member** - A member registering can register another member of the organization. If a fee is entered, it will apply to only this registrant type.
- **Member Guest – a non-member** - A member registering can register a non-member. If a fee is entered, it will apply to only this registrant type.

Subgroups and Events
If your organization has subgroups, another registrant type option is Members of a selected member subgroup. Selecting this option will allow you to configure pricing and registration for each subgroup.

⚠

Member Groups and Registration
If you select individual groups (member types, committees, etc.) to register and pay separate fees, be sure to include all groups who might possibly register, not just the ones paying a different fee. For example, let's say you are hosting an event where your Gold Members pay $50, and your Silver and Bronze Members each pay $100. If you only add Gold Members, $50, only Gold Members will be able to register for the event. There are two ways you can ensure all members can register, and the Gold Members pay a separate fee. The first way is to add Gold Members, $50, and then add Active Members, $100. In this case, Gold Members will see both registration options because they qualify for both. Silver and Bronze Members will only see the $100 registration option. The second way is to add each member type separately. In this case, each member type will only see their member type registration option.

Step 2. (Optional) Display Name

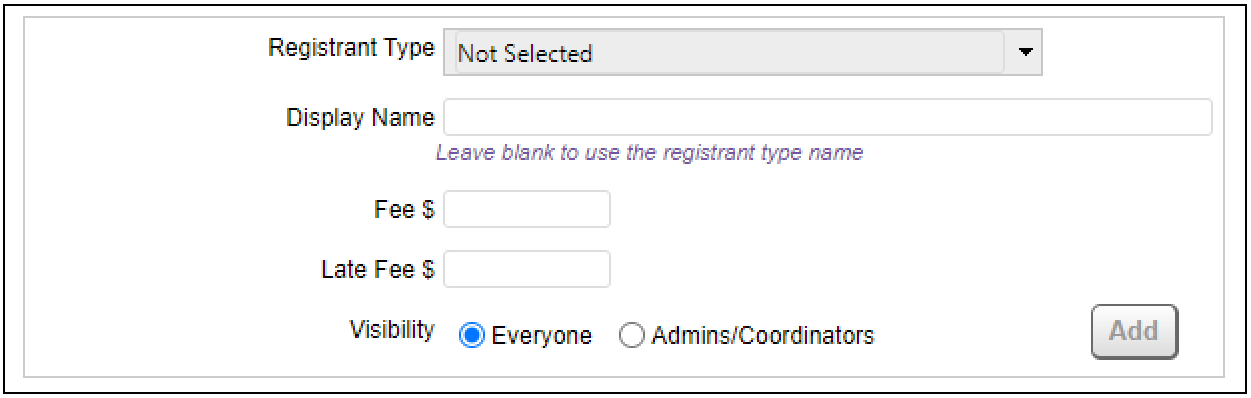
Enter the text to be displayed to the user as the registrant option. The default is to use the Registrant Type name.

> **Note:** If a fee is not required for this event, skip ahead to **Step 4**.

Step 3. Fee

If in Part 5, Step 3(d) the fee *does not change* after a specified date, enter the **fee** to be charged to the registrant type.

If the fee *does change* after a specified date, two fields will appear: *Fee* and *Late Fee*. Enter the **earlier fee** in the *Fee* field. Enter the **later fee** (changed fee) in the *Late Fee* field.



Step 4. Visibility

Determine who can see the registrant type as an option on the registration screen. Select the appropriate option:

- **Everyone** - Any qualifying member or non-member can select this type.
- **Admins/Coordinators** - Only administrators and event coordinators can select this registrant type.

Step 5. Select **Add** to add the registrant type to the list of people who can register.

Step 6. (Optional) Repeat Steps 1-5 to add more registrant types.

Step 7. Select **This panel is complete**, then **Save** to save your changes and return to the Event Admin screen.

Step 8. Navigate to Questions

Select the **Questions** option on the Builder Status Menu, then select the **Edit** icon in the panel.

Copy from another event and Display Sequence
Select the**Copy from another event** button to copy the registrant types configuration from another event.
Select the **Display Sequence** button to change the order in which the registrant type options are displayed for the user.

Part 8. Create Event Questions

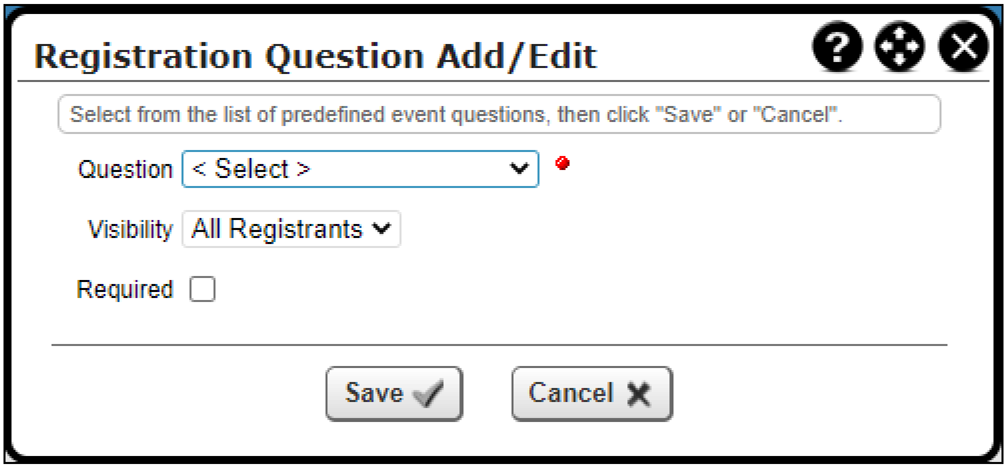
The Event Questions screen is where you will choose which questions to ask registrants. The questions must be created in Event Questions. The screen has two (2) sections:

- Registration Questions - These questions will be asked once per registration, no matter how many people are included. For example, if one member registers themselves and a guest, the question will only be asked once.
- Registrant Questions - These questions will be asked once per registrant in the same registration. For example, if one member registers themselves and a guest, the question will be asked for each registrant.

Adding a Registration Question

Step 1. Select **Add Question** under Registration Questions.

Step 2. In the Registration Question Add/Edit pop-up window:



a. Question - Select the **question** from the drop-down list of questions. These questions are configured in Event Questions.
b. Visibility - Select the appropriate option:
    - **All Registrants** - All registrants will be able to see the question.
    - **Admins Only** - Only administrators registering themselves or other users will be able to see the question.
    - **Not Visible** - The question will not be visible. This option is commonly used to turn a question off before the event without losing answers already submitted by members.

Marking Questions Not Visible
Questions are typically marked Not Visible after some answers have been collected, but before an event takes place. For example, if your organization offers a free t-shirt to the first 20 registrants, you might ask what size t-shirt they would like. After 20 people have registered, you would mark the question Not Visible in order to maintain a record of everyone's answers so far, but not to display the question to future registrants who would not get a t-shirt.

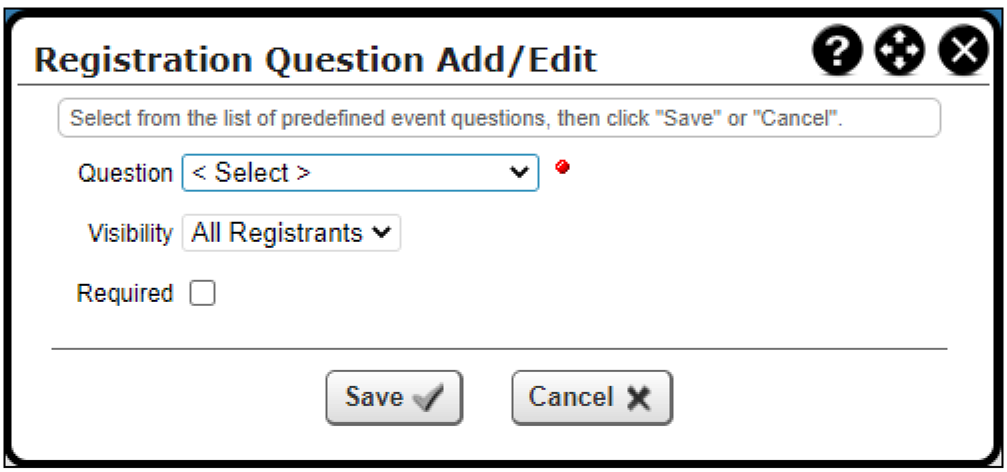
c. Required - Select this option to require registrants to answer the question.

Step 3. Select **Save** to add the question to the list of Registration Questions.

Adding a Registrant Question

Step 4. Select **Add Question** under Registrant Questions.

Step 5. In the Registrant Question Add/Edit pop-up window:



a. Question - Select the **question** from the drop-down list of questions. These questions are configured in Event Questions.
b. Visibility - Select the appropriate option:
   - **All Registrants** - All registrants will be able to see the question.
   - **Admins Only** - Only administrators registering themselves or other users will be able to see the question.
   - **Not Visible** - The question will not be visible. This option is commonly used to turn a question off before the event without losing answers already submitted by members.
c. Required - Select this option to require registrants to answer the question.

Step 6. Select **Save** to add the question to the list of Registrant Questions.

Step 7. Select **This panel is complete**, then **Return to Previous Page** to save your changes and return to the Event Admin screen.

Step 8. Navigate to Emails

Select the **Emails** option on the Builder Status Menu, then select the **Edit** icon in the panel.

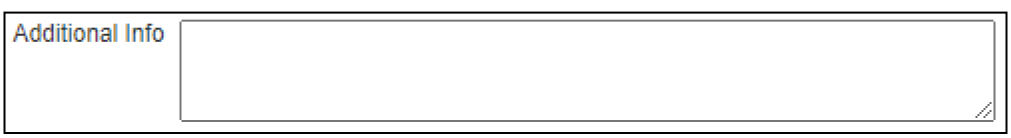
Part 9. Emails

The Emails screen is where you will configure event confirmation and reminder emails. The screen has two (2) sections:

- Email Confirmation - Additional information to be included in the standard confirmation email sent to registrants.
- Automated Email Reminders - Determine when to send email reminders, and to whom.

Configuring the Confirmation Email

Step 1. Enter any **additional information** to be included in the registration confirmation email in the *Additional Info* box.



System Emails
The Registration Confirmation email is just one of many System Emails included with your website. These emails are sent automatically for things like event registrations, confirmations of payment and survey responses. Each of these emails can be customized in *Communications > Setup > System Emails*.

Step 2. Configuring Automatic Email Reminders

a. **Automatically send a reminder email to all registrants**
   Select this option to send up to two (2) reminder emails to all users who have registered for the event (both members and non-members).
   - Select the first **Send on** option to send one reminder email to registrants. The date selector field will enable.
   - Select the second **Send on** option to send a second reminder email to registrants. The date selector field will enable.

b. **Automatically send a reminder email to all members.**
   Select this option to send up to two (2) emails to all members, regardless of whether or not they have registered for the event.
   - Select the first **Send on** option to send one reminder email to registrants. The date selector field will enable.
   - Select the second **Send on** option to send a second reminder email to registrants. The date selector field will enable.

Subgroups and Event Reminders
If your organization has subgroups, under Automatically send a reminder email to all members you will have the option to send the reminder email to the entire organization, or a specific subgroup.

Member Groups and Registration
If you select individual groups (member types, committees, etc.) to register and pay separate fees, be sure to include all groups who might possibly register, not just the ones paying a different fee. For example, let's say you are hosting an event where your Gold Members pay $50, and your Silver and Bronze Members each pay $100. If you only add Gold Members, $50, only Gold Members will be able to register for the event. There are two ways you can ensure all members can register, and the Gold Members pay a separate fee. The first way is to add Gold Members, $50, and then add Active Members, $100. In this case, Gold Members will see both registration options because they qualify for both. Silver and Bronze Members will only see the $100 registration option. The second way is to add each member type separately. In this case, each member type will only see their member type registration option.

Step 7. Select **This panel is complete**, then **Save** to save your changes and return to the Event Admin screen.

Step 8. Navigate to Policy

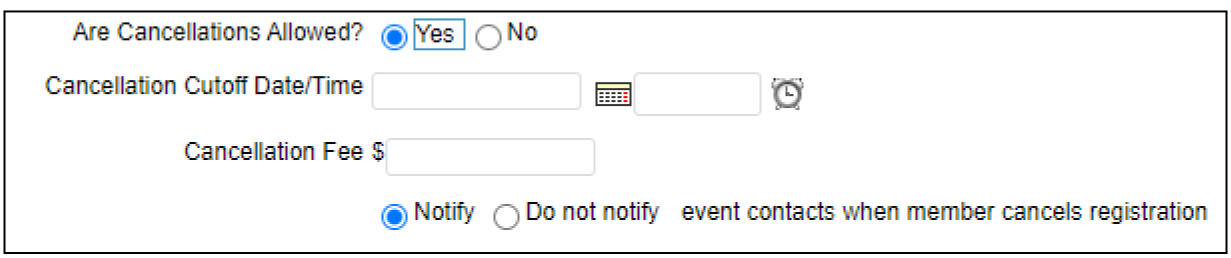
Select the **Policy** option on the Builder Status Menu, then select the **Edit** icon in the panel.

Part 10. Policy

The Policy screen is where you will configure the cancellation and release agreements for the event. The screen has three (3) sections:

- Cancellations - Determine whether cancellations are allowed, and the date and time until which cancellations are allowed.
- Cancellation Policy - Determine whether a cancellation policy is required, and enter the text of the cancellation policy.
- Release Agreement - Determine whether a release agreement is required, and enter the text of the release agreement.

Configuring Cancellation Options



Step 1. Cancellations

a. **Are cancellations allowed** - Select **Yes** to enter in a cutoff time for cancellations. If **No** is selected, skip ahead to Step 3.
   - **Cancellation Cutoff Date/Time** - Use the date selector to pick the cutoff **date** for cancellations, and optionally, the time selector to determine the cutoff **time**.
   - **(Optional) Cancellation Fee** - Determine the **fee** to cancel registration.

- **Notification** - Select **Notify** to notify event coordinators (configured in Part 4) when a user cancels registration.

Step 2. (Optional) Cancellation Policy

a. **Required** - Select **Yes** to display a written cancellation policy. If **No** is selected, skip ahead to Step 3.
b. **Use Default** - Select **Yes** to use the default cancellation policy configured by your organization. Select **No** to enter a new written cancellation policy for the event.
c. **Cancellation Policy Text** - If in *Step 2c* you selected No, enter the written **cancellation policy** for the event.

Default Event Policies
Save time by entering a default written cancellation policy or release agreement in Configure > Event Defaults. In both cases, you can enter a policy different from your default when creating an event.

Configuring Release Agreement Options

Step 3. Release Agreement

a. **Required** - Select the appropriate option:
    - **Yes, including admins** - All registrants, including administrators, are required to sign the release agreement.
    - **Yes, excluding admins** - Only member and non-member registrants will be required to sign the release agreement; administrators will not be required to sign.
    - **No** - Registrants will not be required to sign a release agreement.
b. **Enable Quick Release** - Select **Yes** to enable the Quick Release option for non-members attending the event without registering in advance.

Quick Release
Quick Release is an option you can use to quickly register a non-member at an event who did not register in advance, and therefore did not sign your release agreement. When a logged-in administrator or event coordinator accesses the event and Quick Release is enabled, they can enter the name and email address of the non-member, and the non-member can quickly agree to and sign the waiver.

c. **Use default** - Select **Yes** to use the default release agreement configured by your organization.
d. **Name of Agreement** - If in *Step 3c* you selected No, enter the **name** of the release agreement for the event.
e. **Release Agreement Text** - If in *Step 3c* you selected No, enter the written **release agreement** for the event.

Step 4. Select **This panel is complete**, then **Save** to save your changes and return to the Event Admin screen.

Step 5. Navigate to After Event

Select the **After Event** option on the Builder Status Menu, then select the **Edit** icon in the panel.

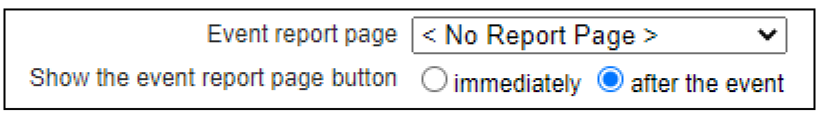
Part 11. After Event

The After Event screen is where you will add items attendees can view related to the event. The screen has two (2) sections:

- Event report page - Select a preexisting custom page to link to in the event.
- Event photo album - Select a preexisting photo album to link to in the event.

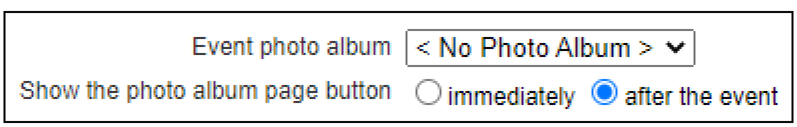
Configuring the Event Report Options

Step 1. Configure event report page options



a. Event report page - Select the appropriate **custom page** from the drop-down list.
b. Show the event report page button - Select the appropriate option:
    - **Immediately** - A link to the custom page will appear on the event page immediately.
    - **After the event** - A link to the custom page will appear on the event page immediately *following the event*.

Step 2. Event photo album



a. Event photo album - Select the appropriate **photo album** from the drop-down list.
b. Show the photo album page button - Select the appropriate option:
    - **Immediately** - A link to the photo album will appear on the event page immediately.
    - **After the event** - A link to the photo album will appear on the event page immediately *following the event*.

Step 3. Select **This panel is complete**, then **Save** to save your changes and return to the Event Admin screen.

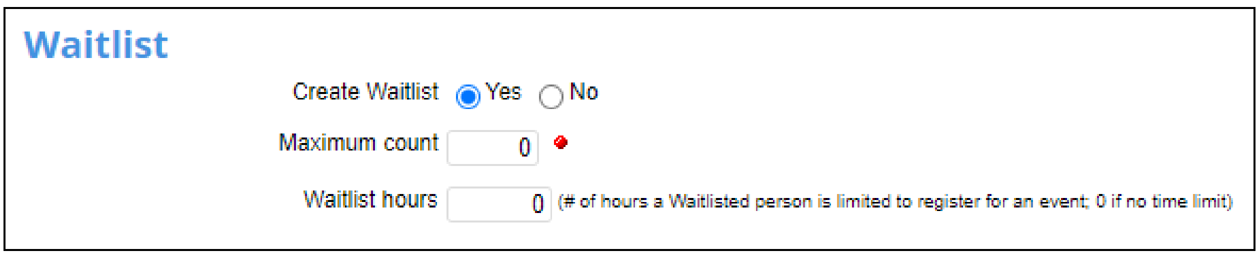
Waitlist

If either Recommended, Required, Required by Date is selected in Part 6, Step 1a **and** a registrant capacity is set in Part 6, Step 2a, you have the option to enable a Waitlist for the event. When event registration reaches capacity and a Waitlist is enabled, registrants can add themselves to the Waitlist and receive a notification when a spot opens up for registration. Waitlist settings are configured on the Registration & Fees screen.

Configuring the Waitlist

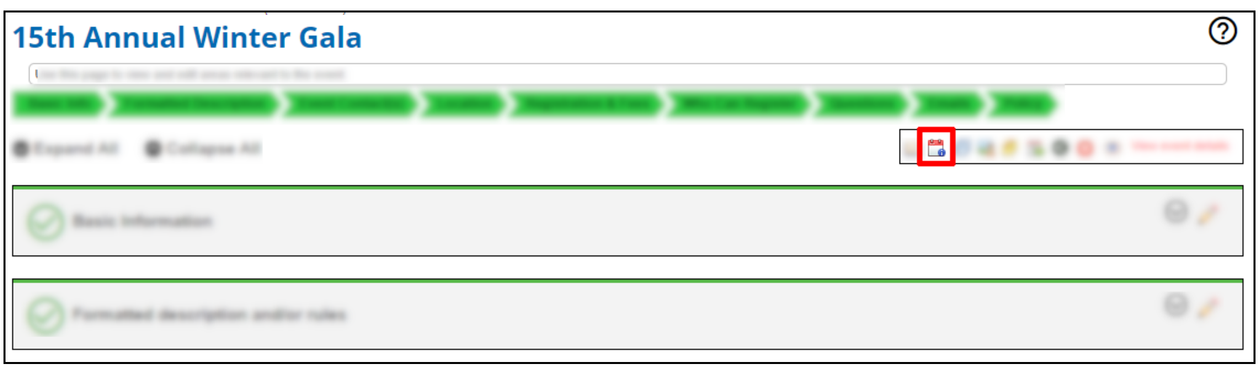
Step 1. Configure the Waitlist settings

a. Create Waitlist - Select **Yes** to enable the Waitlist.
b. Maximum count - Enter the **maximum number of people** permitted to add themselves to the Waitlist.
c. Waitlist hours - Enter the **amount of time** a Waitlisted person has to register for the event once they have been notified that a spot is open for registration.



Navigating to the Waitlist

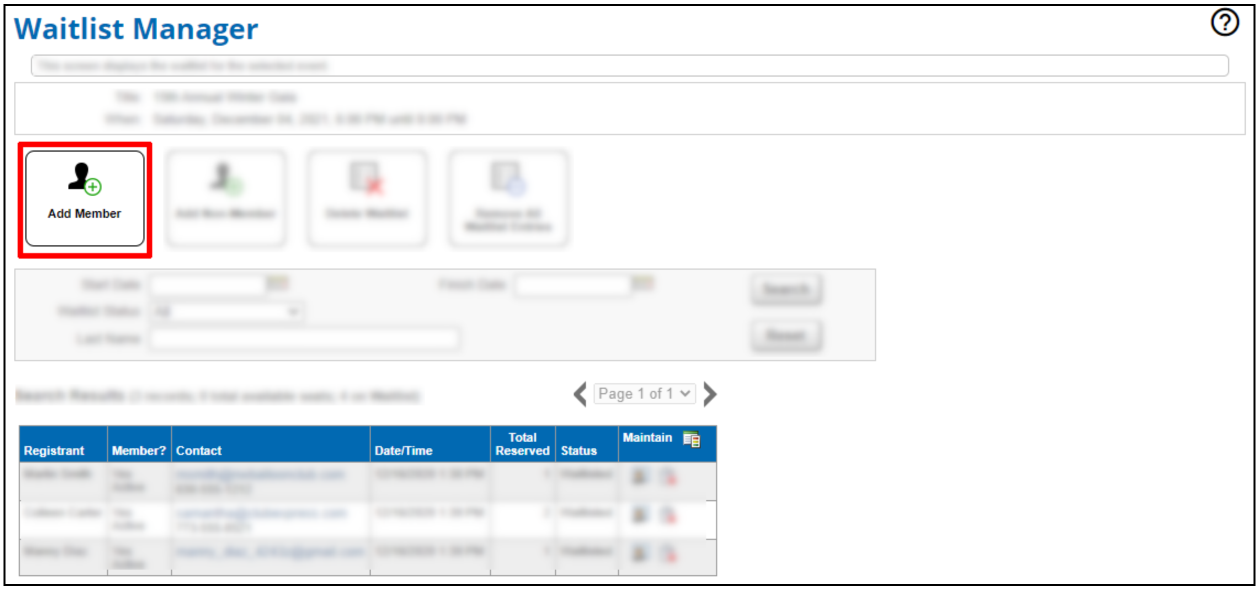
When the Waitlist is enabled, a new icon appears on the Event Admin screen in the Admin Toolbar. Select the **Waitlist icon** in the Admin Toolbar to navigate to the *Waitlist Manager* screen.



Adding a Member or Non-member to the Waitlist

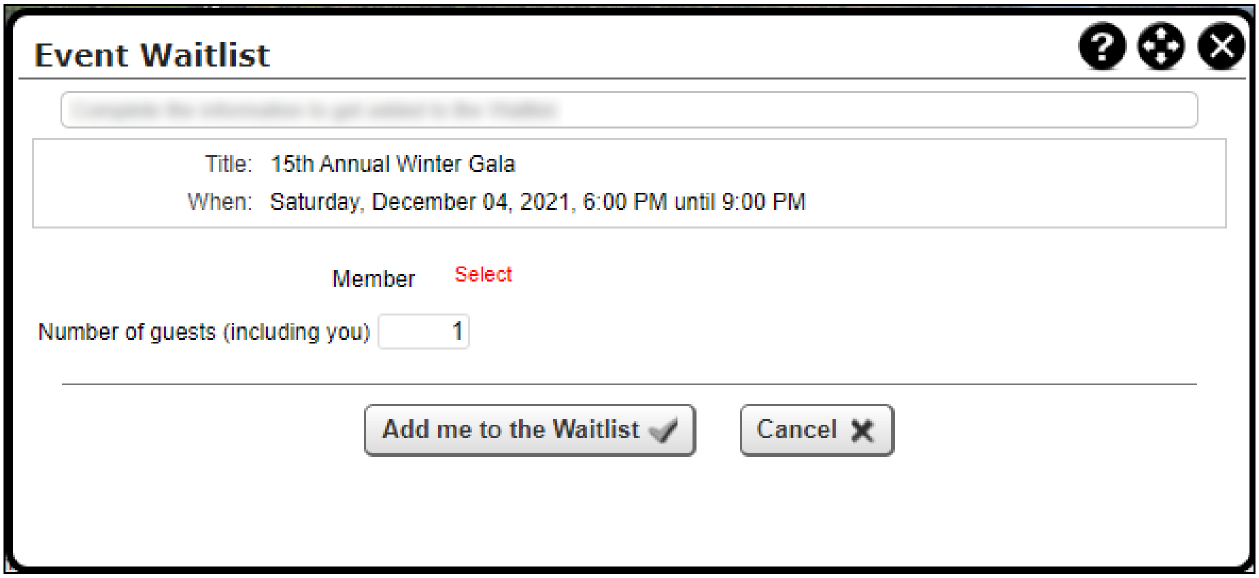
> **Note:** When the Waitlist is enabled and event capacity is reached, members and non-members will see the option to add themselves to the Waitlist instead of the option to register for the event. The following instructions are for *administrators or event coordinators* adding members and non-members to the Waitlist from Waitlist Manager screen.

Step 2. (Optional) Add a Member to the Waitlist

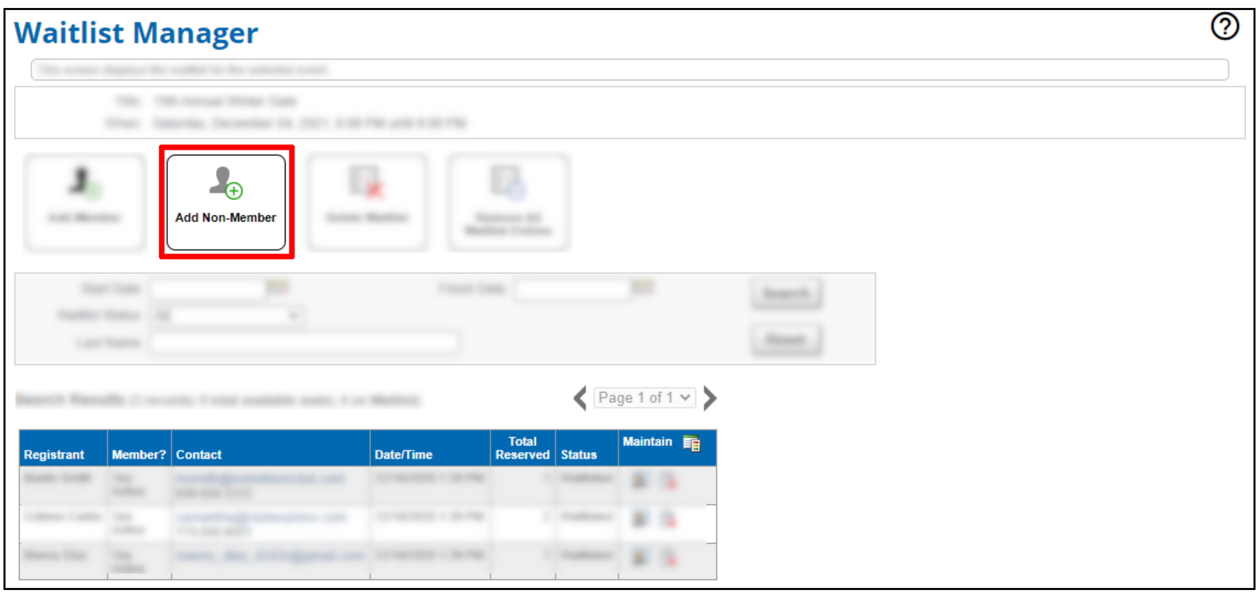


a. Select **Add Member** to add a member to the Waitlist.
b. In the Event Waitlist popup, select **Select** to search the member database.
c. Number of guests (including you) - Enter the **number of people** to add to the Waitlist, including the member.

d. Select **Add me to the Waitlist** to add the member (and guest(s)) to the Waitlist.

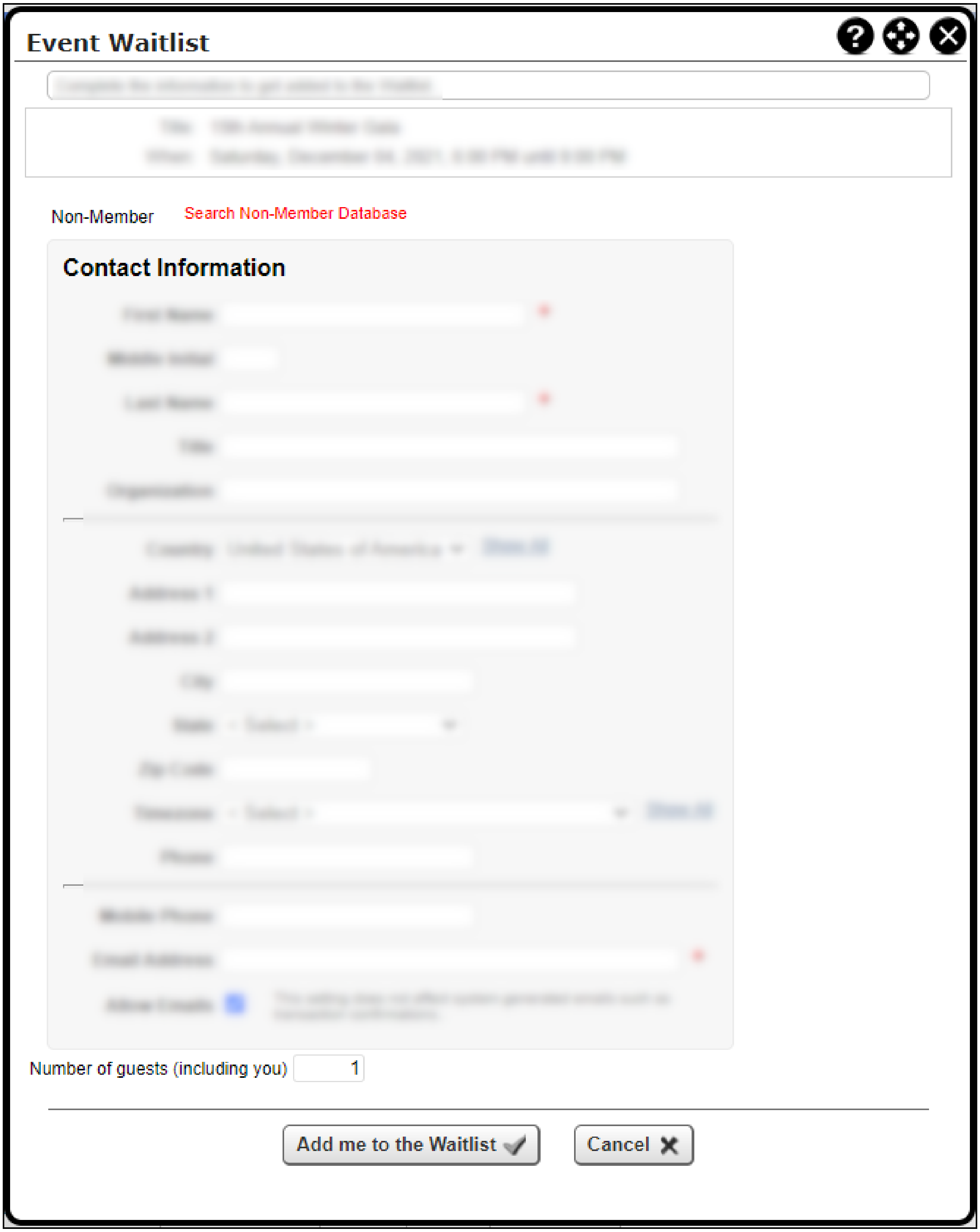


Step 3. (Optional) Add a Non-member to the Waitlist



a. Select **Add Non-member** to add a member to the Waitlist.
b. (Optional) In the Event Waitlist popup, select **Search Non-Member Database** to find the non-member if they are already in the non-member database.
c. Enter the contact information for the non-member. The non-member will be added to the non-member database.
d. Number of guests (including you) - Enter the **number of people** to add to the Waitlist, including the non-member.

e. Select **Add me to the Waitlist** to add the non-member (and guest(s)) to the Waitlist.



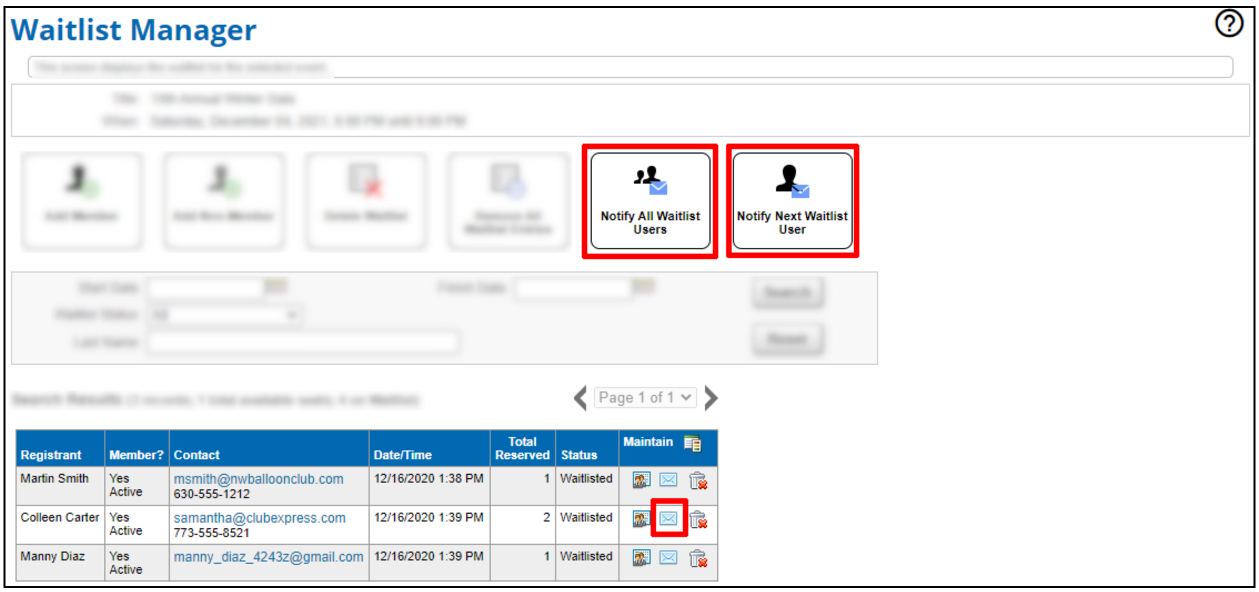
Managing the Waitlist

If an existing registrant cancels their registration, two additional buttons appear in the Waitlist Manager: Notify All Waitlist Users and Notify Next Waitlist User.

Step 4. Notifying Waitlist Users

Select the appropriate option to notify one or more of the users on the Waitlist:

- **Notify All Waitlist Users** - Send an email notifying each person that one or more spots for registration have opened.
- **Notify Next Waitlist User** - Send an email to the person at the top of the Waitlist queue.
- **Notify User icon** (in the Maintain column) - Send an email to notify that user.



Waitlist Hours
The time a waitlisted user has to register for a newly opened spot is the number of hours you entered in [Step 1c](). If the number of hours has passed and a waitlisted user has not registered, the status of waitlisted users will change to *Time Expired*. An administrator or event coordinator can use one of the options in Step 4 to notify waitlisted users again.

Step 5. Deleting Waitlist Users

Select the appropriate option to remove one or more users from the Waitlist.

- **Delete Waitlist** - Permanently delete all users from the Waitlist and optionally send a notification to the users.

⚠

Deleting the Waitlist
This option permanently removes all waitlisted users from the Waitlist; use this option with caution.

- **Remove All Waitlist Entries** - Remove all users from Waitlist and optionally send a notification to the users. The status of the waitlisted user will change to Removed by Admin.
- **Delete icon** (in the Maintain column) - Delete an individual user and optionally send a notification to the users. The status of the waitlisted user will change to Removed by Admin.

⚠

Deleting a User Removed by Admin
If a user has been deleted or removed, with a status of Removed by Admin, selecting the Delete icon again will permanently remove the user from the Waitlist.

★

Reactivating a Waitlisted User
If you select Remove All Waitlist Entries or use the Delete icon to remove an individual user from the Waitlist, an administrator or event coordinator can select the Reactivate icon  to add the user back to the Waitlist.

Repeating Dates

If in Part 1, Step 1h you selected This event repeats on multiple and/or on-consecutive dates, each date can be configured separately.

Default Event Creation Wizard Pages
If you find that you tend to use the same pages most of the time, you can set pages to be selected and unselected automatically in Configure > Event Defaults. For example, if you almost never ask registrants questions, you might want the Questions page unchecked by default. You can still add the page to the Wizard, however the option will be unchecked by default.

Navigate to Repeating Dates

A new option will appear on the Event Admin screen as part of the Event Creation Wizard: Repeating Dates.

Step 1. Select the **Repeating Dates** option on the Builder Status Menu, then select the **Edit** icon to edit the section.

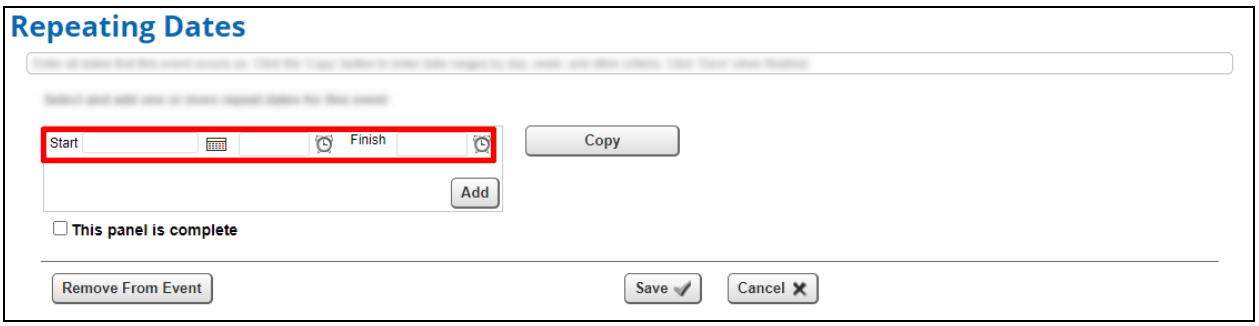
The Repeating Dates screen is where you will add each date for the event.

Adding Event Dates

Event Dates: Calendar Basis vs. Periodic

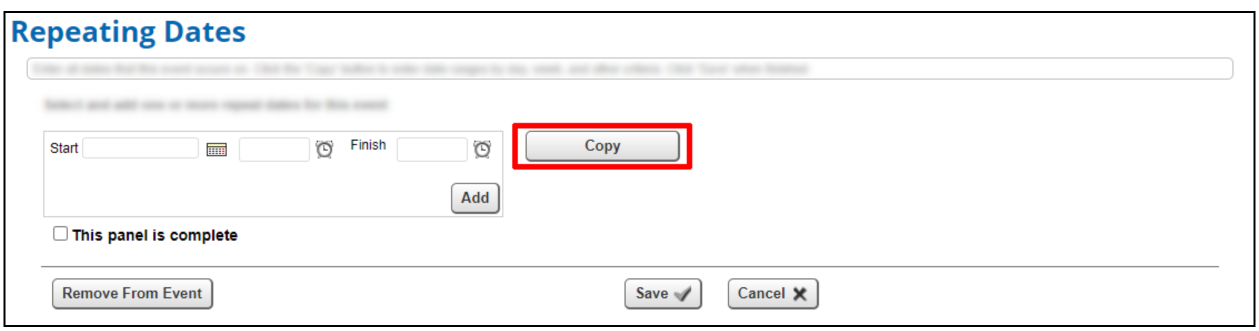
Dates for an event can be configured on a calendar basis (a meeting weekly on Monday, for 8 weeks) or periodically (a class every Wednesday at noon for 8 weeks, except the last two weeks will meet on Thursday at 3PM). If most of the dates are on a calendar basis, save time by adding all event dates at one time in Step 3, then follow Step 4 to change the date or time of the occurrences which don't match.

Step 2. Add a single date



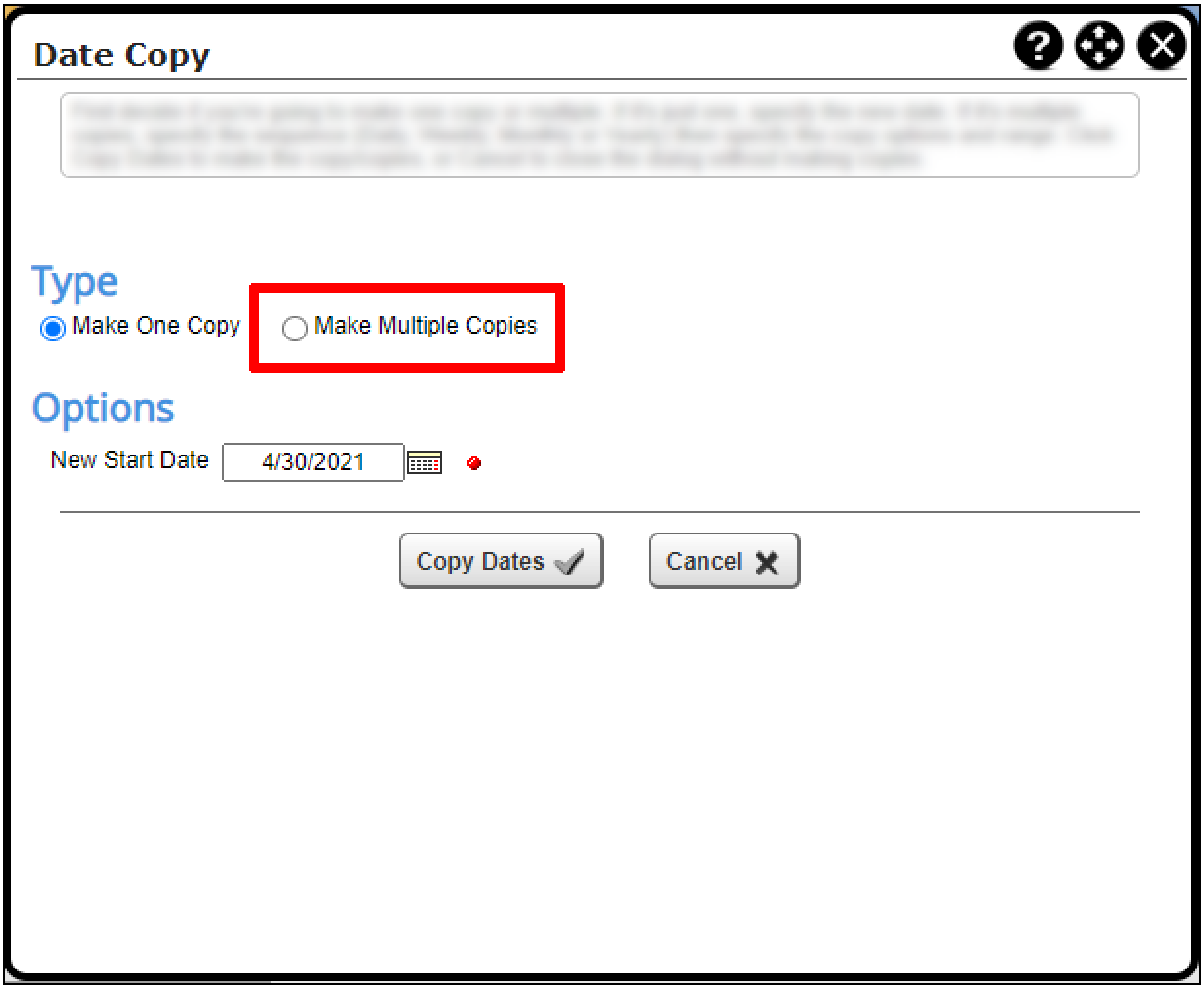
a. The first occurrence of the event was configured on the Basic Info screen. Use the date and time selectors to add the **start date/time and finish time** of the *second* occurrence of the event.
b. Select **Add** to add the occurrence to the list of event dates.
c. Repeat Step 2a-b to add remaining dates.

Step 3. Add multiple dates at once

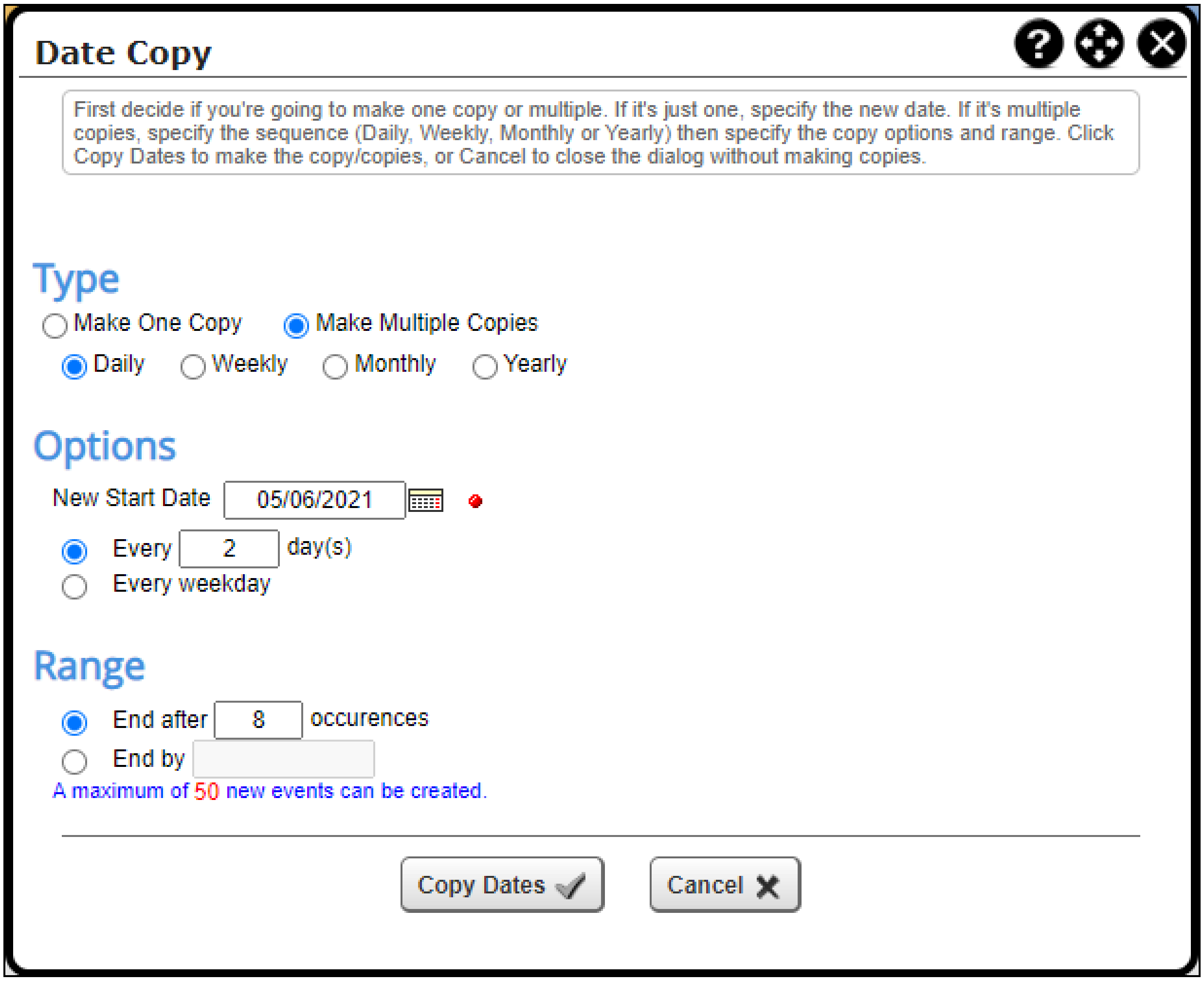


a. Use the date and time selectors to add the **start time and finish time** of all subsequent event dates.
b. Select the **Copy** button to add multiple dates.

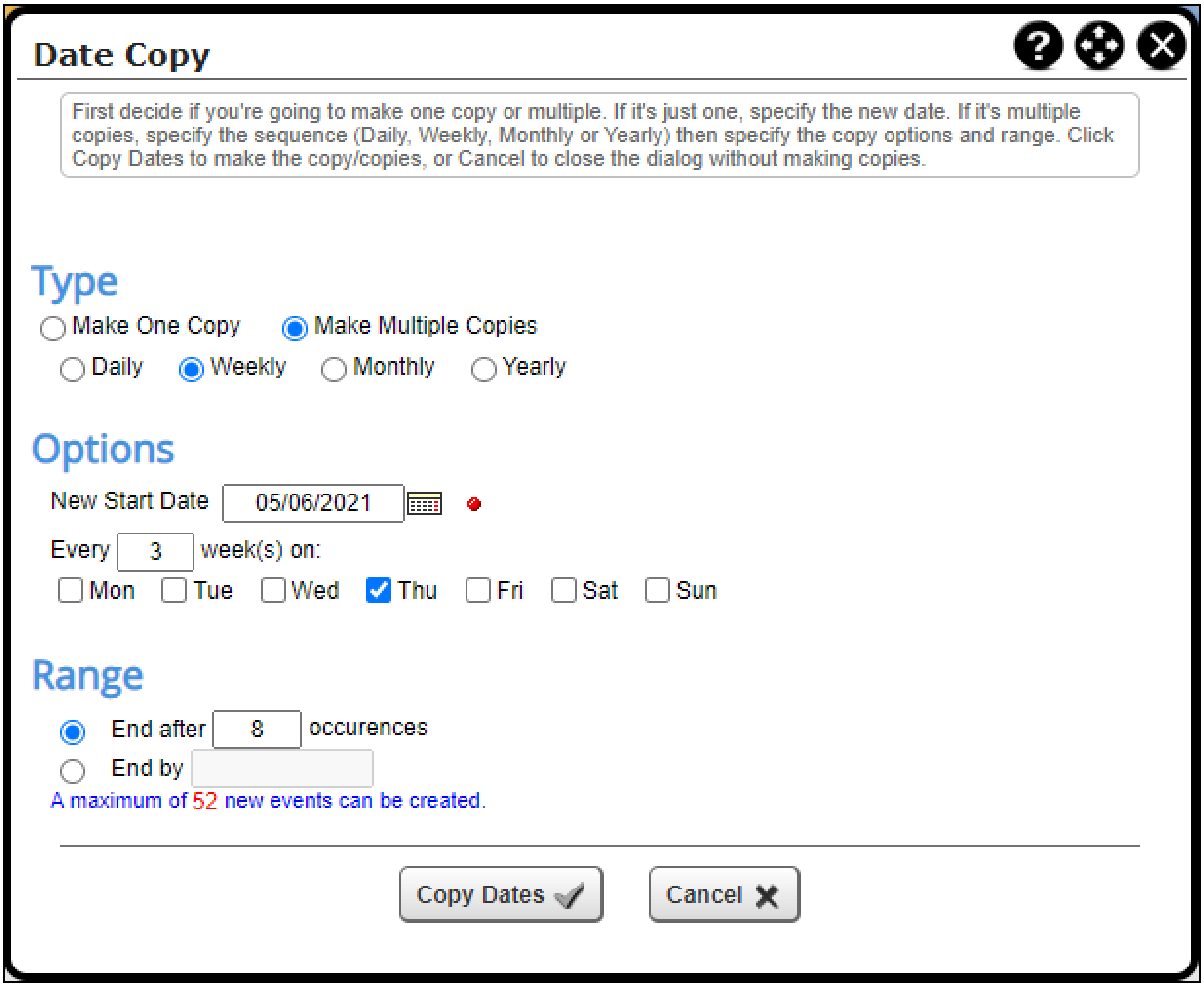
c. In the *Date Copy* pop-up window, select **Make Multiple Copies** to show additional fields and configure the dates.



d. Type - Select how often the event should repeat, either **Daily, Weekly, Monthly or Yearly**.
e. New Start Date - The first occurrence of the event was configured on the Basic Info screen. Use the date selector to add the **date** of the *second* occurrence of the event.
f. Calendar Basis - Select the appropriate option based on the *Type* selected in Step 3d.
   - **Daily** - Enter either the number of days between a repeated date (for example, every two (2) days), or select Every weekday to repeat the event Monday - Friday.

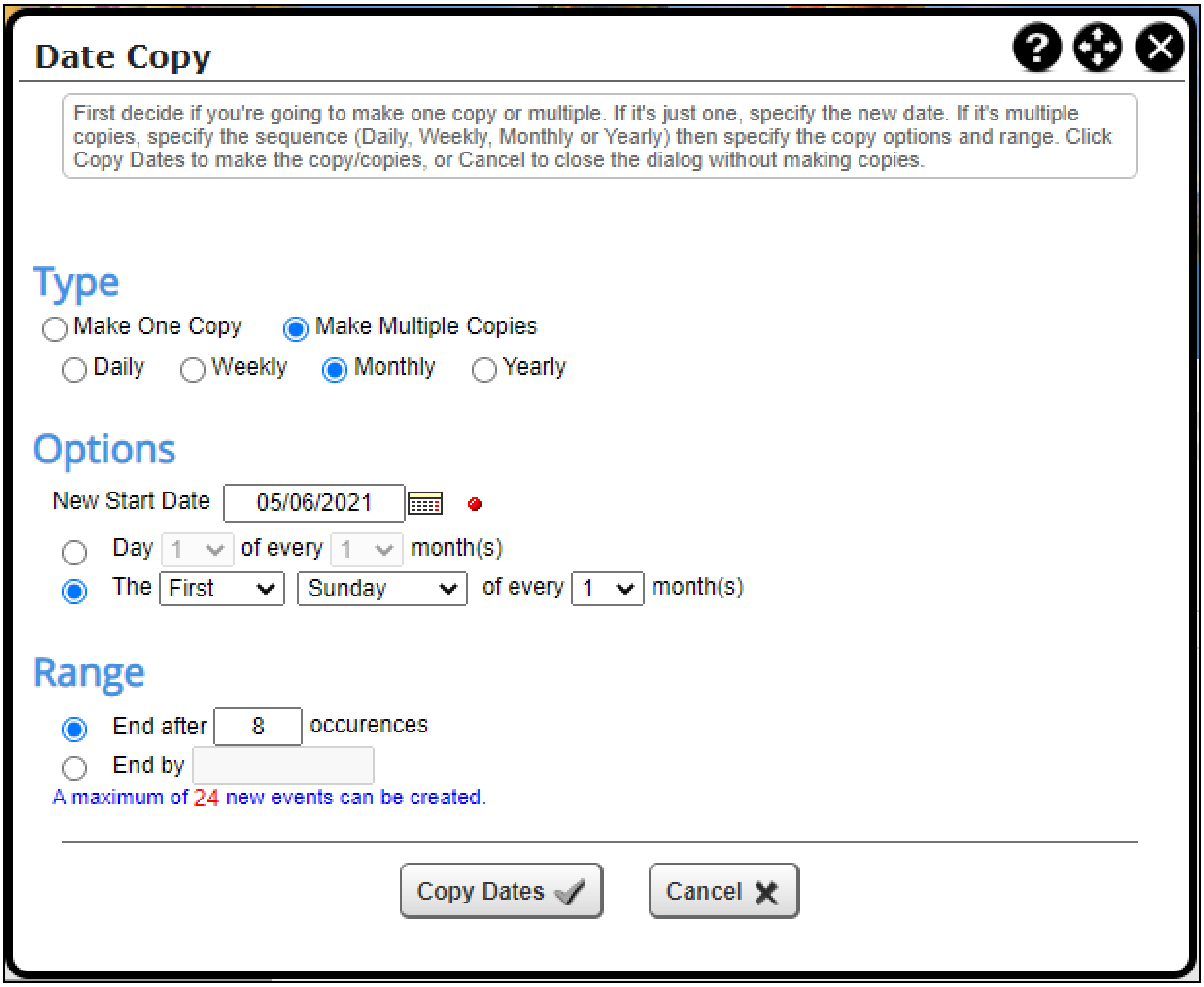

Date Copy
First decide if you're going to make one copy or multiple. If it's just one, specify the new date. If it's multiple copies, specify the sequence (Daily, Weekly, Monthly or Yearly) then specify the copy options and range. Click Copy Dates to make the copy/copies, or Cancel to close the dialog without making copies.
Type
Make One Copy
Make Multiple Copies
Daily
Weekly
Monthly
Yearly
Options
New Start Date
05/06/2021
Every
2
day(s)
Every weekday
Range
End after
8
occurences
End by
A maximum of 50 new events can be created.
Copy Dates
Cancel

- **Weekly** - Enter the number of weeks between a repeated date (for example, every three (3) weeks), then select the days of the week on which the event should repeat.



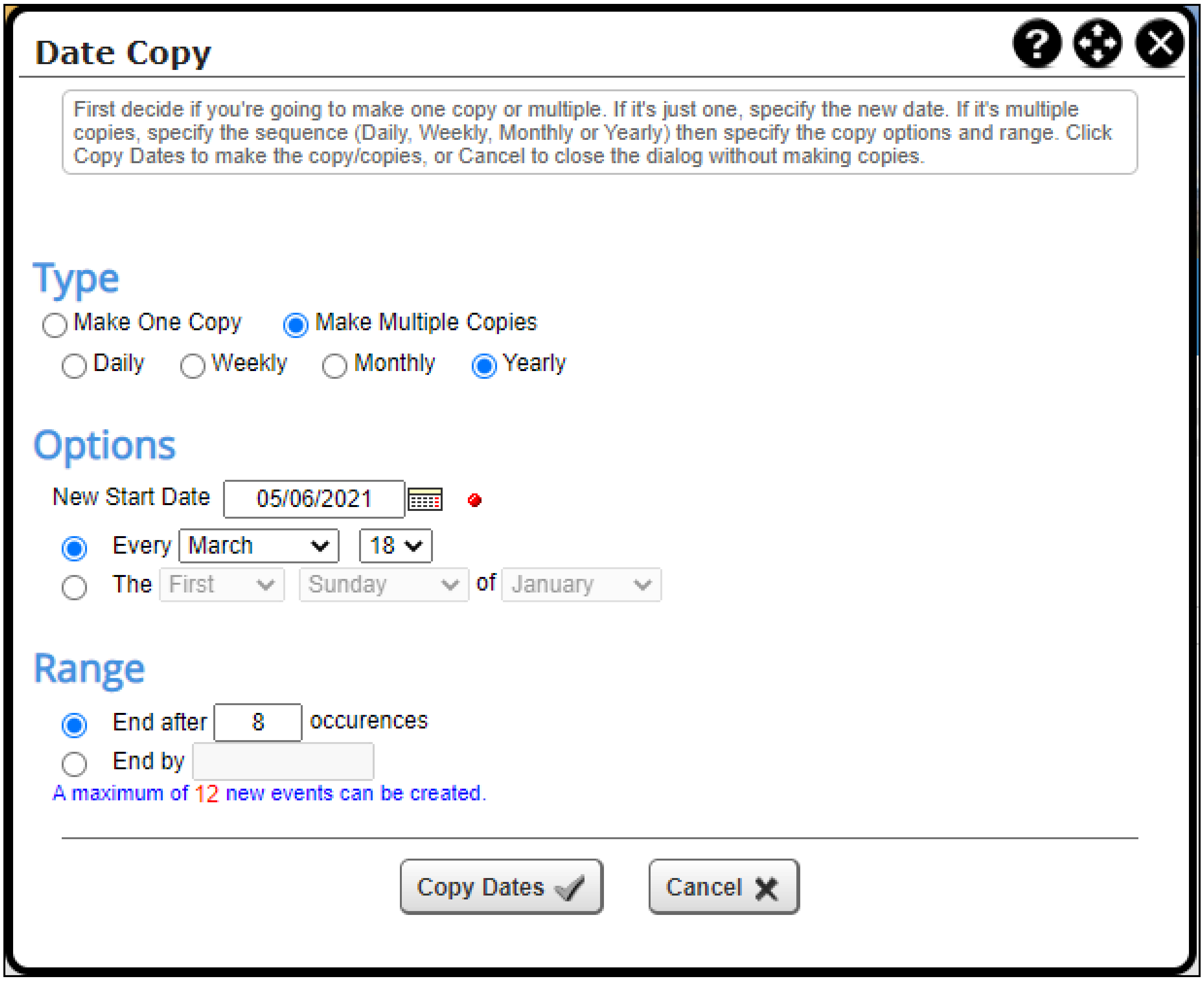
- **Monthly** -
    - Select the date and how many months between a repeated date (for example, the 14th of the month, every 2 months).
    - Select the first, second, third, fourth, or last day of every month. Select the day of the week, then the number of months between a repeated date (for example, the first Sunday

of every month).



- **Yearly** -
  - Select the month and date (for example, March 18).

- Select the first, second, third, fourth, or last day of every month. Select the day of the week, then month (for example, the first Sunday of January).



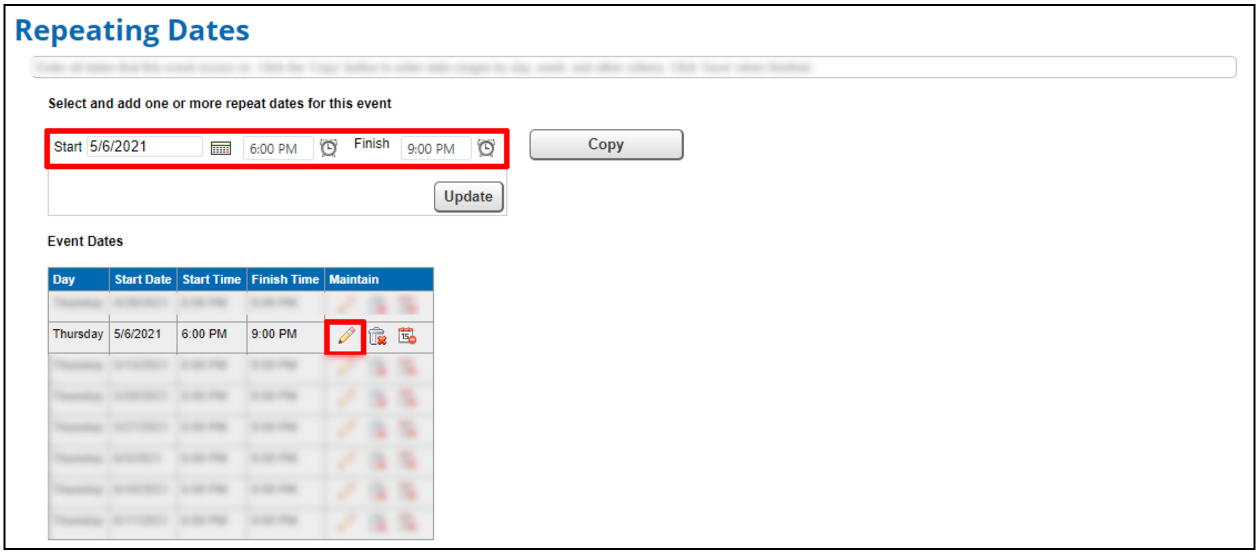
g. Range - Select **End after** to end the event after a number of occurrences, or select **End by** to end the event by a specific date.
h. Select **Copy Dates** to create the event with the selected dates.

Managing Event Dates

Event dates will appear in a grid on the Repeating Dates screen. Each date can be edited, deleted or canceled.

Step 1. Editing an event date

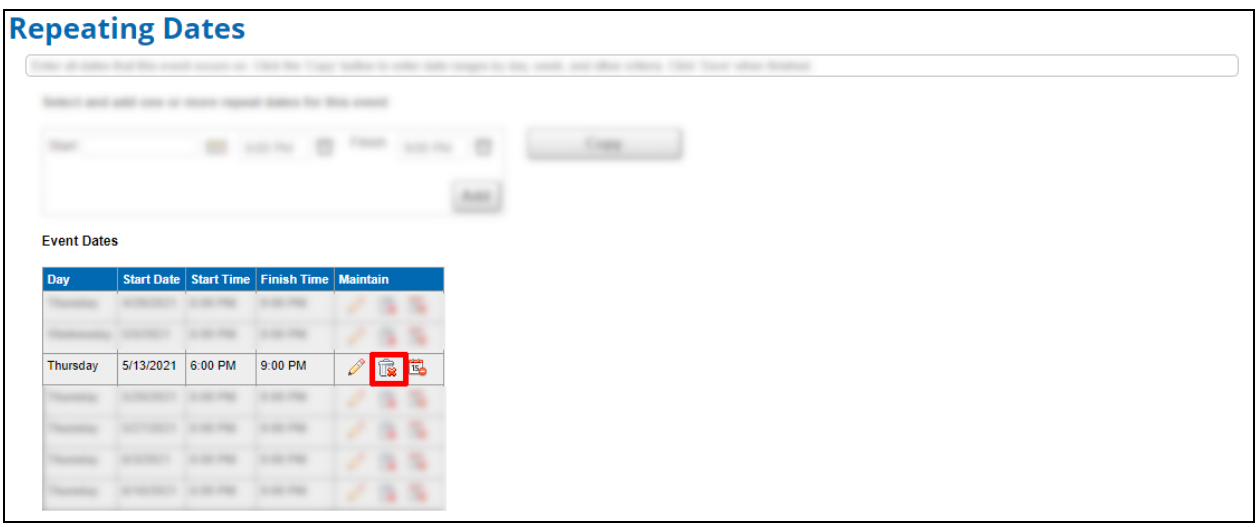
a. Select the **Edit** icon of the date to be edited. The date and time will automatically populate the fields at the top of the screen.



b. Use the date and time selectors to change the **date and time** of the event occurrence.
c. Select **Update** to change the date and/or time.

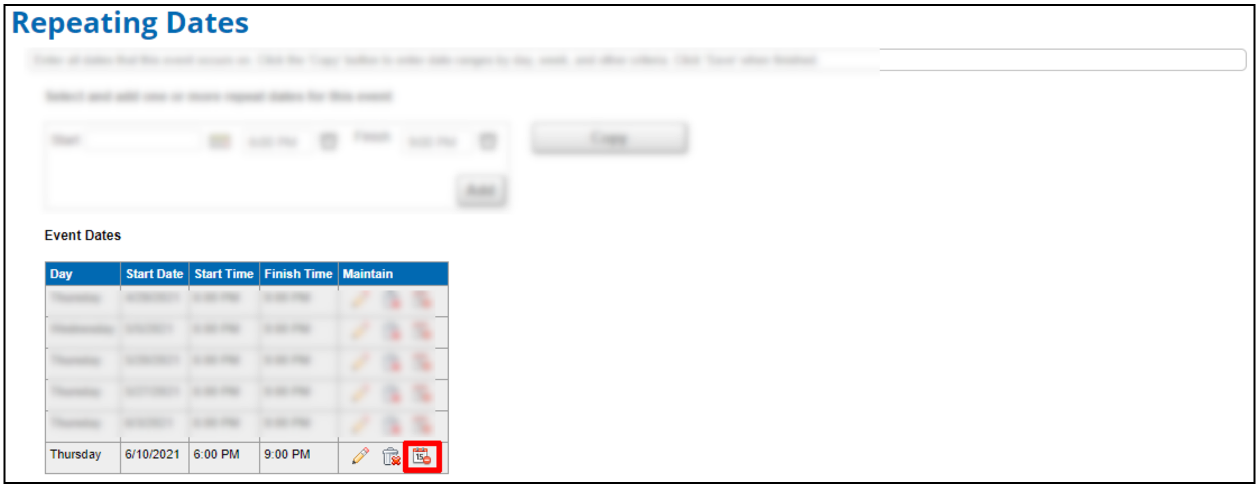
Step 2. Deleting an event date

Select the **Delete** icon to permanently delete the event date.



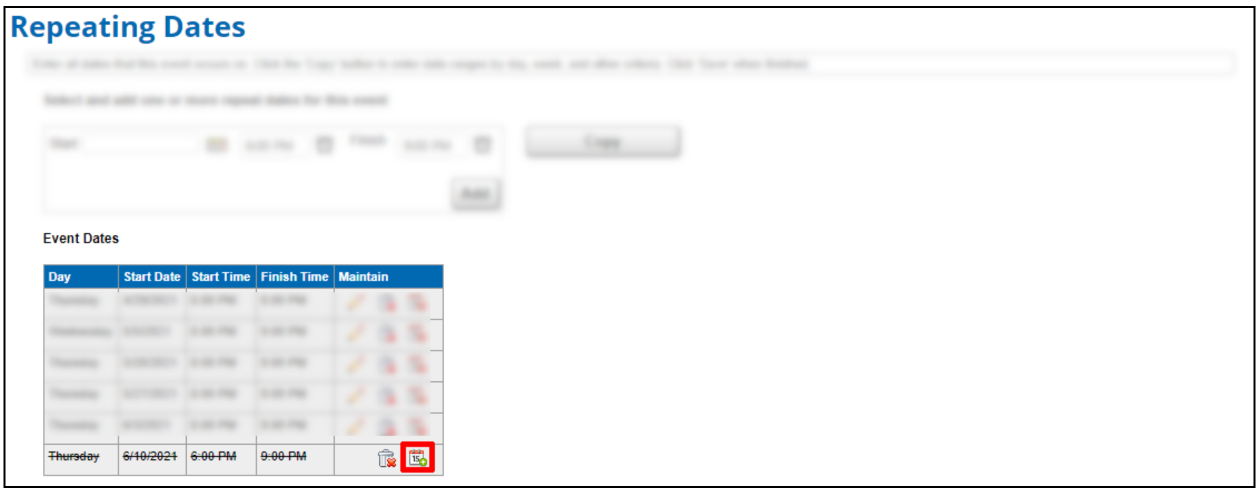
Step 3. Canceling an event date

Select the **Cancel** icon to cancel the event occurrence. The date will appear in the list of event dates when a user views the event on the calendar, but will display "CANCELED" next to the date.



Step 4. Reinstating a canceled event date

Select the **Uncancel** icon to reinstate an event.



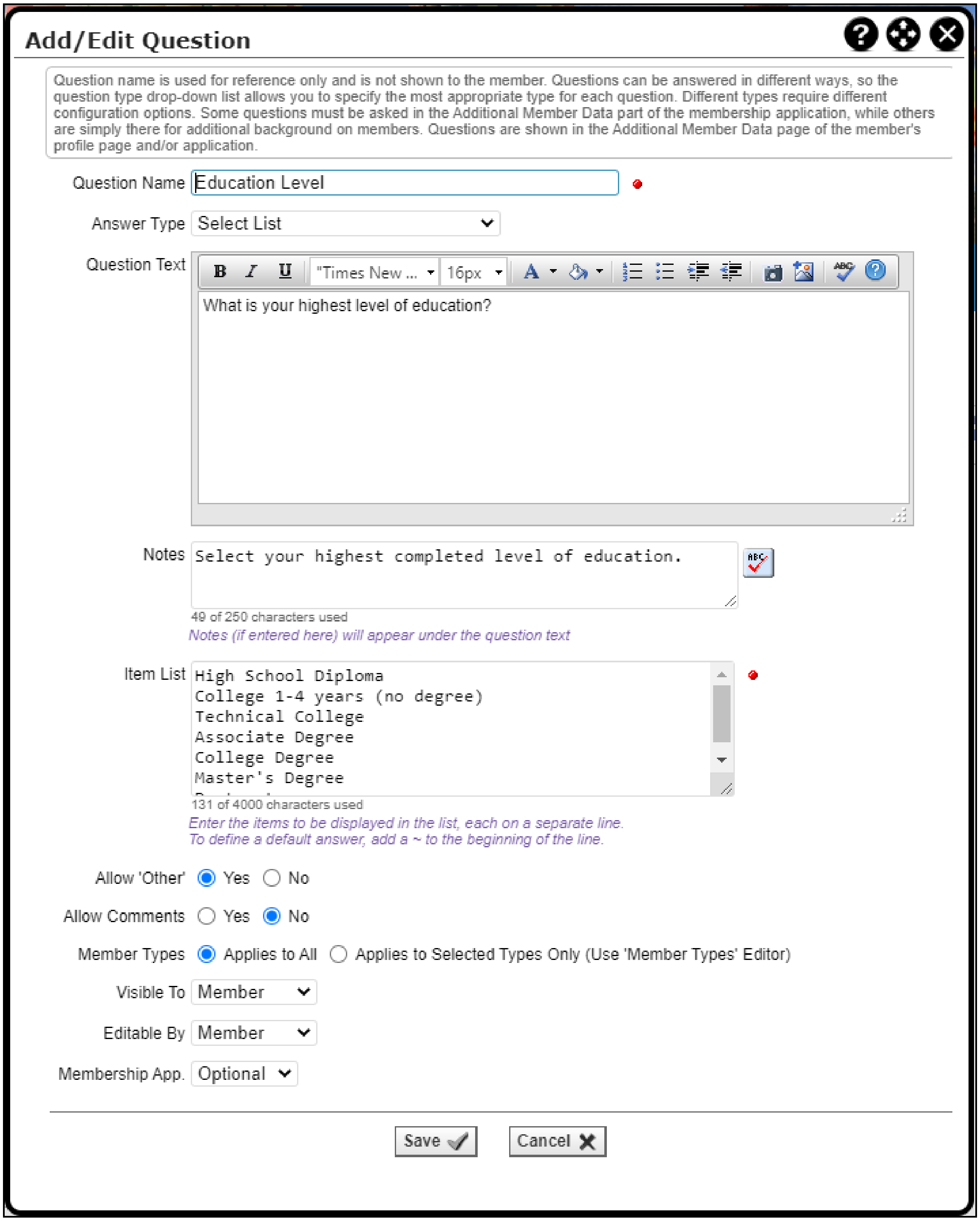
Answer Types

Reading the table

- **Type** – The answer type selected from the drop-down list of types.
- **Display** – How the response option is displayed to the user.
- **Additional Values** – Additional fields that appear when creating the question based on the selected answer type. Some of these additional fields may be required when selecting this answer type.
- **Options** – Additional options that appear when creating the question based on the selected answer type.

Example – Configuring a question

Below is an example of a question configured as a Select List.



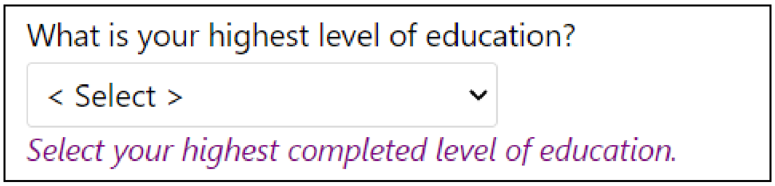
In addition to the fields in [Part 3, Step 3,](#) three new optional fields appear: Item List, Allow "Other" and Allow Comments.

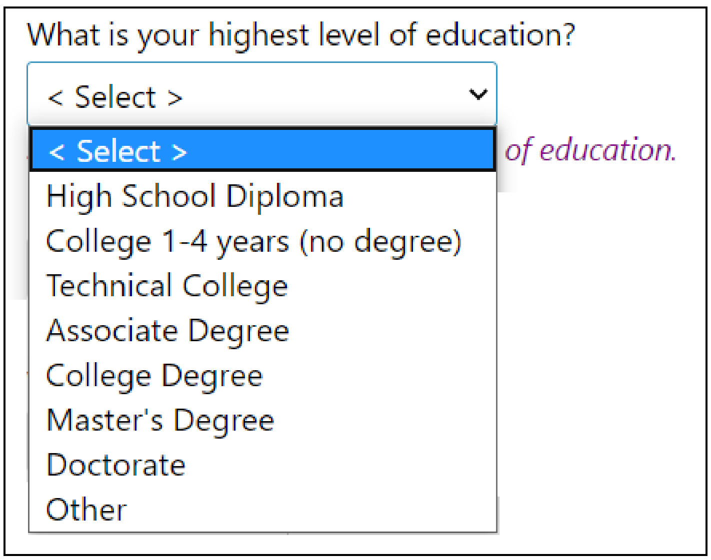
- **Item List** – Enter the items to appear in the drop-down list under the question. The items will appear in the order in which they are entered. To have one item be selected by default, enter a ~ before the item.

- **Allow "Other"** – Inserts "Other" as an option in the drop-down menu at the end of the list you configured in the previous step. Selecting "Other" will present the user with an empty text box in which to type their answer.
- **Allow Comments** – Displays a text box under the drop-down menu to allow the user to enter comments.

Example – User Interface

Below is an example of how the same question appears for a user.





Answer Types

The following answer types are available:

> **Note:** To designate a **default** answer, add a ~ to the beginning of the line. To designate a **correct** answer (for example, in creating a quiz for an E-Learning course), add a % to the beginning of the line.

Type	Display Format	Additional Values	Options
Heading/ Instruction Text	Question text only, no	Any formatted text, including images and photos	N/A

Type	Display Format	Additional Values	Options
	response is allowed		
Short Text	Text field	Default answer, Max length	
Formatted Text	Text Field where the answer must be in a specified format	Answer format • Numbers only (plus space and hyphen) • Letters only (plus space and hyphen) • Numbers and Letters (plus space and hyphen) • Email Address • Web Address (URL) • US Phone Number • US Zip Code • Canada Post Code • Australian Post Code • UK Post Code • Custom – Enter a Regular Expression and test the expression Regular Expressions are a powerful format string using dot characters, alternation, grouping, character classes, quantifiers, word boundaries, anchors, and lookaheads.	Required: yes/no Allow comments: yes/no
Long Text	Large text block	N/A	Max length required: yes/no
Date Year	Drop-down list showing 4-digit numbers	Default answer, minimum value, maximum value	Required: yes/no Allow comments: yes/no
Date Month	Drop-down list showing the months of the year	Default answer	Required: yes/no Allow comments: yes/no
Date Day	Drop-down list showing the numbers 1-31	Default answer	Required: yes/no Allow comments: yes/no
Date Full	Text field with a popup date-picker icon	Minimum value, maximum value	Required: yes/no Allow comments: yes/no
Day of Week	Drop-down list showing the days of the week	Default answer	Required: yes/no Allow comments: yes/no
Time of Day	Time selector	Earliest time, latest time	Required: yes/no Allow comments: yes/no

Type	Display Format	Additional Values	Options
Integer	Text field	Default answer, minimum value, maximum value	Required: yes/no Allow comments: yes/no
Number	Text field	Minimum value, maximum value	Required: yes/no Allow comments: yes/no
Select List	Drop-down list showing the choices in the order entered	Enter the items to be displayed in the list, each on a separate line. Press [Enter] to move to the next line as you're entering the items. A minimum of two (2) items must be specified.	Required: yes/no Allow other: yes/no Allow comments: yes/no
Check box List	Vertical list of check boxes; any and all can be selected	Enter the items to be displayed in the list, each on a separate line.	Specify the minimum and maximum selections that can be made. Allow other: yes/no Allow comments: yes/no
Radio Buttons	Vertical list of radio buttons; only one can be selected	Enter the items to be displayed in the list, each on a separate line. You can enter just one entry; the "Other" options is available for situations where the user should be allowed to enter something different (i.e. a write-in candidate for an election) **Note:** To designate a **correct** answer (for example, in creating a quiz for an E-Learning course), add a % to the beginning of the line.	Required: yes/no Allow other: yes/no Allow comments: yes/no To define an initial default answer, add a ~ to the beginning of that line
True/False	Radio button	Specify "True" text Specify "False" text Select an initial default, or no default	Required: yes/no Allow comments: yes/no
Multiple Text Boxes	Vertical list of text fields; anything can be entered into each field	Enter the number of text boxes to be displayed. Specify the maximum length of each answer. Specify the minimum number of values that must be entered.	Allow comments: yes/no
Scale	Horizontal list of radio buttons representing	Enter text to be displayed above each radio button, each entry on a separate line. The number of lines determines the	Required: yes/no Store numbers: yes/no (If

Type	Display Format	Additional Values	Options
	the "strength" of the respond-ent's opinion	number of radio buttons. A minimum of two (2) items must be specified.	no is specified, val-ues will be stored)

Question/Answer Types

More About Formatted Text Questions

When you select “Formatted Text” for the answer type, an additional option appears to define the answer format. The following predefined formats are available to select:

- Numbers Only (plus space and hyphen)
- Letters Only (plus space and hyphen)
- Numbers and Letters (plus space and hyphen)
- Email Address
- Web Address (URL)
- US Phone Number
- US Zip Code
- Canada Postal Code
- Australian Postcode
- UK Postcode
- Custom

When you select the “Custom” option, another field appears to allow you to define a custom format. This option uses a feature of many programming languages called a **Regular Expression**. With this feature, you define a format string using dot characters, alternation, grouping, character classes, quantifiers, word boundaries, anchors, and lookaheads. At runtime, this format string then defines what users can enter into the field.

Regular expression syntax is subtly different in different programming languages. ClubExpress uses the syntax defined by JavaScript.

> **Note:** Regular Expressions are for experienced software developers only. They can be as simple or as complex as you want them to be, but there is a significant learning curve. ClubExpress cannot provide support for individual regular expressions that are not working as you might want them to work.

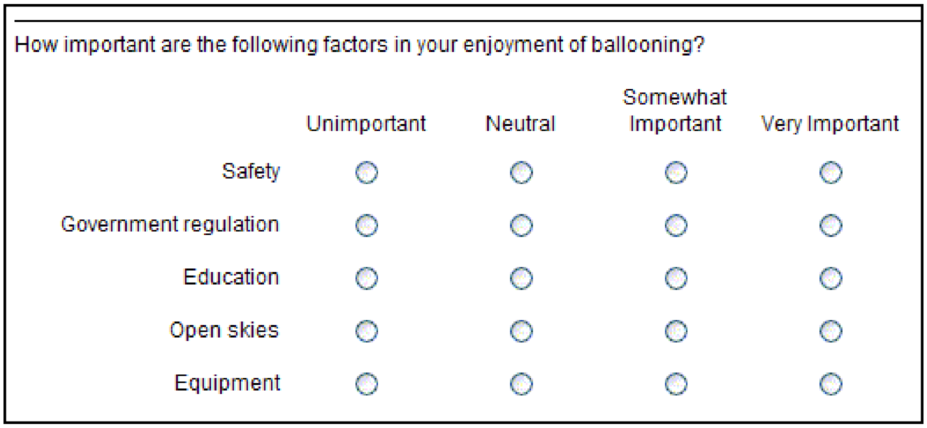
For more information about regular expressions, see the following websites:

Basic Reference: http://www.w3schools.com/jsref/jsref_obj_regexp.asp

A site with more detailed info, examples, and specifics of javascript support: http://www.regular-expressions.info/

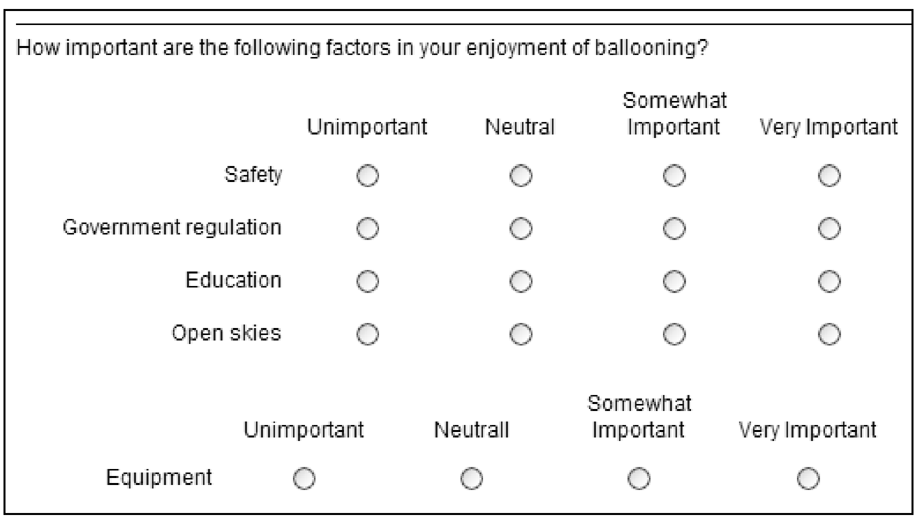
Scale Questions

Scale questions can have any number of levels, representing the strength of the respondent's opinion. They are also often displayed in groups, as shown in the following example:



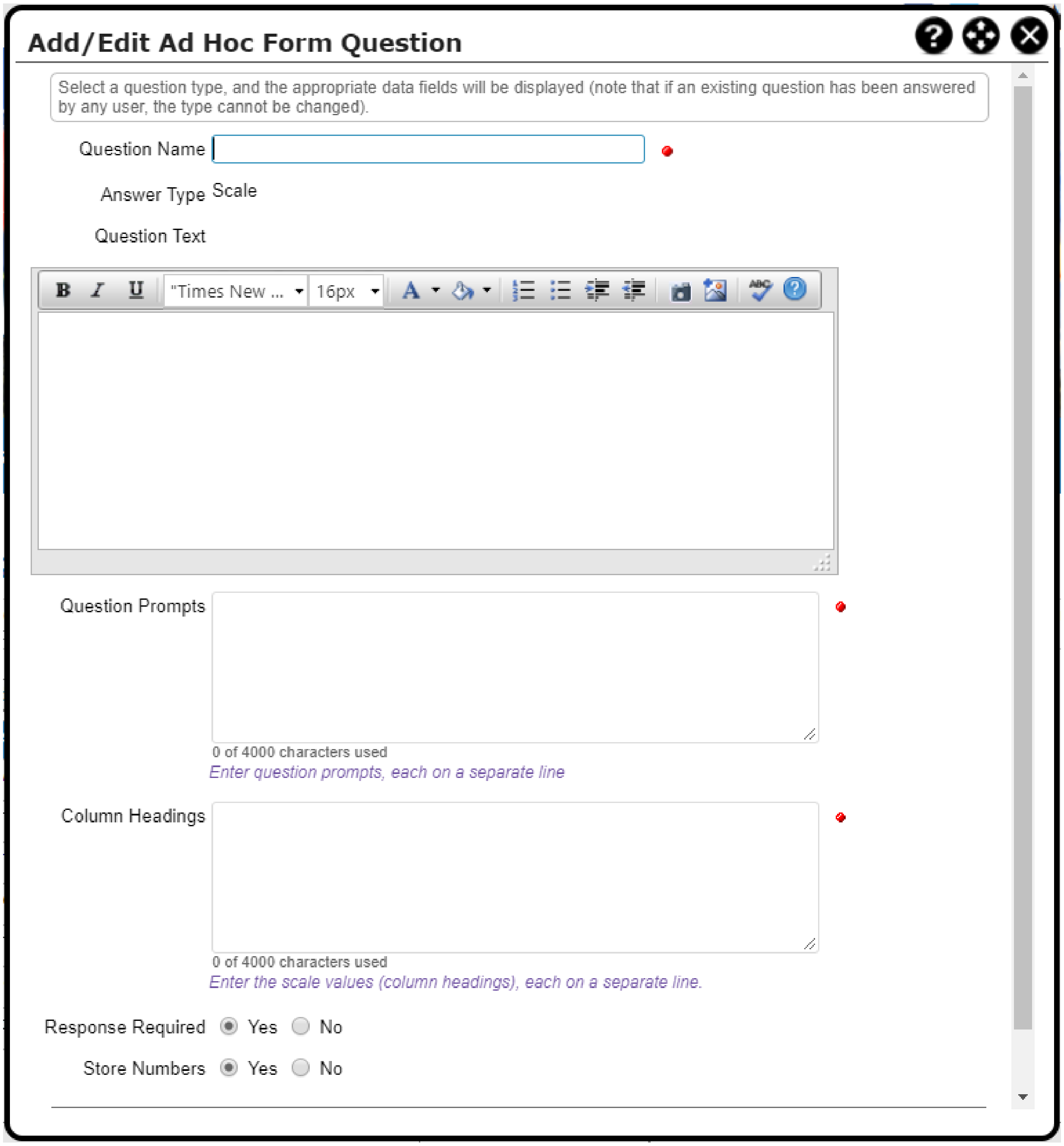
ClubExpress includes special functionality to display scale questions. If there's a group of scale questions together and they all have the same number of values, and the text for these values are the same for each question, then only one set of values will be displayed. But if the text is different in any way, they will be treated as separate questions with separate value blocks.

> **Example:** In the figure below, there is a typo in the value block for the last question ("Neutrall"), so it is separated out.



Entering Scale Questions All at Once

We have provided a shortcut to make it easier to add a group of scale questions. Click the **Add Scale Question** button. You will see the following dialog:



This dialog allows you to enter the question, the column headings and the question prompts all at once. When you save the dialog, the “Question” becomes a “Heading/Instruction Text” question, the question prompts become the questions for each row of radio buttons, and the column headings become the values above each column of radio buttons, identical for each question.

In the above example, this dialog would create six questions on the ad hoc form, the header question and five individual scale questions. The titles are also managed so that you can identify which question is which.

Entering Scale Questions One at a Time

Scale questions can also be entered like any other question. You should begin with a “Heading/Instruction Text” question. Then enter the second question, specifying the values (column headings) you want to use for all of them. Keep the actual “question” text short, since it’s just a prompt to the left of the radio buttons, and the overall question is in the heading.

You should copy the values into the Clipboard. Then when you specify each subsequent question, you can paste these values in so that they match.

This option is useful if you need to add a row to your scale question group.

> **Example:** If you want to add a row asking how important is “Competition”, you can do this by editing one of the existing questions and copying the values to the Clipboard. Then enter the new question with the same values and move it into the position you want.

Storing and Reporting Values or Numbers

Scale questions allow you to pick whether the results are stored using the values (column headings) or using a number. This is done on the Add/Edit Question dialog. If you elect not to store numbers, the actual column heading for the chosen radio button is stored. If you elect to store numbers, the first value (column heading) is treated as 1; the second value is treated as 2; etc.

> **Example:** “Poor,Fair,Good,Excellent” will be reported as 1,2,3,4. But a scale of 0 – 10 will be reported as 1 – 11.