

County Managers with permissions may setup and manage events. Additional Managers may be added to view registrations or to assist with the management of registrations.

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## Creating an Event

1. Click on the Events tab in the navigation pane.
2. Click the Add Event button to create a new event.
3. Enter the name of the event.
4. Enter the Event Description.
5. Select the program year in which the event will occur.
6. Enter the Event Start Date.
7. Enter the Event End Date.
8. Click Add.
9. Review the Event details.
10. Click the Edit button to modify the event details if needed.
  - a. Enable Sessions – used when there are multiple dates or options for overall registration
  - b. Allow Multiple Registrations – allows member to register more than once.
  - c. Allow Registrations by Manager Only – only a manager can register a member for the event. Families cannot self register.
  - d. Payment Credits On – checks accepted for payment.
  - e. Payment Electronic On – Credit card payments accepted. **DO NOT USE AT THIS TIME.**
  - f. Session Type – If Enable Sessions is checked this can be set for Sessions or Contest.
  - g. Bank Account – Not Used.
  - h. Require County/District/Region/Program approval – If checked a level needs to approve the registration. If nothing checked, registration is approved immediately upon submittal.
  - i. Program Year – which year is event taking place?
  - j. Start Date – Event start date. Not registration start date.
  - k. End Date – Event end date. Not registration end date.
11. Click the save button when you are done making changes to the event details.
12. Open/Restrict Event by County. By default the event is open to your county only. Click edit and add counties if you want members from additional counties to register.



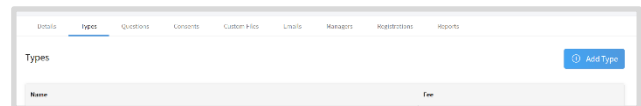
13. You may upload a logo image for your event.
14. You may upload a Splash image for your event.
15. The logo and splash image appear for families when they select an event for which to register a member. The logo is in the upper left corner next to the name of the event. The splash image is the large photo located above the Register button.



## Creating Registration Types

Each member role that will be registering needs to have a Registration Type created. There can be multiple Registration Types for a role. For example, you may have campers and camp counselors. Both would be Club Member role, but you would ask different questions. (more on questions later)

1. Click on the Types sub-tab.
2. Click the +Add Type button.



3. Enter in the name of the Registration Type.
4. Select the role from the drop-down menu that applies to the registration type.
5. Select the Health Form from the drop-down menu that applies to the event.
  - a. Adult and Youth health forms are the same as during enrollment.
  - b. Youth Extended is the full overnight health form including mediations.
6. Verify the Program year for the event is correct.
7. Set the maximum number of registrations for the registration type. 0 = unlimited.
8. If registration is limited to only members that are enrolled in the program, check the box for Restrict to Program. If this box is not checked, participants may register for the event.
9. Initiate Registration by Manager Only – Staff needs to start the registration before member can continue and submit
10. Enter the registration fee if applicable.
11. Set the Registration Start Date.
12. Set the Registration End Date.

13. If Early Registration is available (i.e. discounted registration fee for early registrants), check the box to allow Early Registration. Otherwise, skip to Step 17.
14. Set the Early Registration Fee.
15. Set the Early Registration Start Date.
16. Set the Early Registration End Date. (NOTE: It should not overlap with the Registration Start Date in step 11)
17. If available, check the box to Allow Late Registration (i.e. a different registration fee applies to late registrations). Otherwise, skip to step 21.
18. Set the Late Registration Fee.
19. Set the Late Registration Start Date. (NOTE: It should not overlap with the Registration End Date in Step 12)
20. Set the Late Registration End Date.
21. To restrict this registration type by age or grade, select Youth Registration Type to Age Grade or Program Youth Division.
  - a. If you chose Age Grade, add the ages (as of Jan 1 of program year) or add the Grades.
  - b. There are four grade divisions – Cloverbud (K-2), Intermediate (3-5), Junior (6-8), and Senior (9+). Depending on what grades you select, this might be quicker and Age Grade.
22. Click Add.
23. Repeat Steps 2 – 22 for each registration Type that you are setting up for the event.

## Creating Custom Event Questions

1. Click on the Questions sub-tab.
2. Click the + sign to create a question.

3. Select the type of question you would like to create from the list of options.

- A) Checkbox – a single option (not recommended for Yes/No questions)
- B) Content Block – text information
- C) Date Picker – date field
- D) Dropdown – menu of selections
- E) Multi-Line Text – long text response
- F) Multiple Choice – multiple responses may be selected
- G) Number Input – numerical response
- H) Radio Group – single response selection (use this for Yes/No questions)
- I) Single-Line Text – short text responses
- J) Quantity – select 1, 2, 3, etc.

4. Click the Add button.

5. Enter in your question.

6. Setup your option Labels.

7. If there is a limited number of registrants that can select each option label, enter the number in the # Available fields.

8. If a fee is associated with each selection, enter the fee amount. This amount is in addition to the registration fee.

9. If the member may only select a certain number of options, check the Limit Choices box and enter the number of choices that may be selected.

10. Check the Required box if a response is required.

NOTE: If a checkbox question is required, the member will be required to check the box(es).

11. Select the registration type that can view the question.

12. If the fields should only be answered by a manager, check the True box for Manager Only.

13. Use the Minimum Hierarchy View menu to choose the lowest level of the hierarchy for Managers who may view the question and response. (Institution or County)

14. Use the Minimum Hierarchy Edit menu to choose the lowest level of the hierarchy for Managers who may edit the response.

15. Click the Save button.

16. Repeat steps 2 – 15 for each question you need to add.

Label	# Available	Fee	Remove
IS - Science of It	45		
FS - Tasting Lab	45		
Hort - Landscap	60		
HORT - Greenho	45		
SP - Athletic Tra	60		
SP - Sports Pron	60		
ENGR - Chemica	90		

## Event Consents

1. Click on the Consents sub-tab.
2. Click the + Associate Consent button.
3. Choose the consent title you want to associate with the event.
4. Choose the Registration Type that will need to complete the consent.
5. Click the Save button.
6. Repeat for each consent and each registration type that needs to complete the consent in order to participate in the event.

## Event Custom Files

1. If your registrants should upload a file as part of their registration, click on the Custom Files sub-tab.
2. Click the + Add Custom File.
3. Enter the name of the custom file.
4. Enter a description of the file.
5. Use the Type drop-down menu to select the type of file to be uploaded.
  - A) High Quality Image (.tiff)
  - B) Image (.jpg, .png, .gif)
  - C) PDF
6. Check the box next to the Registration Type(s) that will be uploading the files.
7. Click the Add button.

## Event Emails

There are default emails that are sent when certain steps are completed in the registration process. You can customize these for the event.

1. Click on the Email sub-tab.
2. Click the +Add Email Template button.

3. Enter in the Display Caption (subject).
4. Use the Type drop-down menu to select the type of action that will trigger the sending of the email.
  - A) Partial Payment Applied
  - B) Payment Approved
  - C) Payment Declined
  - D) Payment Refunded
  - E) Registration Approved
  - F) Registration Declined
  - G) Registration Moved to the Next Level
  - H) Registration Sent Back
  - I) Registration Submitted
5. Click the Add button.
6. Click on Edit to update the text of the email template.
7. Click Edit to add or change the text of the message.
8. Enter the text of the message.
9. Click on an email variable to insert a form field to customize the message.
10. Click Save at the bottom of the message.

A dialog box titled "Add Event Email Template" with a close button (X) in the top right corner. It contains two input fields: "Display Caption" and "Triggering Event Action" (which is a dropdown menu). An "Add" button is located at the bottom right.

A section titled "Event Emails" with a blue "+ Add Email Template" button. Below the title, there is a list of email templates, with "Registration Submitted" visible.

An editor for an "Event Email Template". The title bar says "Event Email Template" with a "Save" button. The main area shows a "Registration Submitted" template with a rich text editor. On the right, there is a list of "Email Variables" including Program Name, Program Year, Family/Program Name, Family Email, Family Street, Family City, Family State, Family Postal Code, Member Email, Member First Name, Member Last Name, and Member Age. An "Edit" button is in the top right.

## Event Managers

1. Click on the Managers sub-tab to assign managers to the event. The manager creating the event will appear in this list by default as well as the primary admin for that area of the hierarchy.
2. Event Managers may be added to any event from any level of the hierarchy. County events may have Institution or County level Managers added to help manage the event, or they can be given read only access. Click the +Add Event Managers button.
3. Enter the Manager's Name or email address.
4. Use the Role drop-down menu to select the manager's role.
  - A) Admin
  - B) Staff
  - C) Volunteer

A screenshot of the "TestingEvent" page with the "Managers" sub-tab selected. The "Event Managers" section shows a table with columns: Last Name, First Name, Role, Setup, Registrations, and Managers. One manager is listed: Truhn, Patricia, Event Admin, Write, Write, Write. A blue "+ Add Event Managers" button is in the top right.

A dialog box titled "Add Manager to Event" with a close button (X) in the top right corner. It contains several dropdown menus: "Email or Name", "Role" (with "Volunteer" selected), "Event Setup" (with "None" selected), "Registration Management" (with "None" selected), and "Edit Event Managers" (with "None" selected). A "Save" button is at the bottom right.

5. Use the Event Setup drop-down menu to select the manager's permission for setting up the event.
  - A) None
  - B) Read
  - C) Write (edit)
6. Use the Registration Management drop-down menu to select the manager's permission to manage registrations.
  - A) None
  - B) Read
  - C) Write (edit)
7. Use the Edit Event Managers drop-down menu to select the manager's permission to Edit (Add/Remove) Event Managers.
  - A) None
  - B) Read
  - C) Write (edit)
8. Click the Save button.

## Registrations

1. Click on the Registrations sub-tab.
2. Event managers with permissions may search and view registrations. Use keywords, and filters for Registration Status, Registration Type, Registration Dates and Approval Dates to search for specific registrations.
3. You may also send a broadcast email to the search results.

## Making an Event Active

1. By default, the event is in Testing status during the setup process.
2. Click the Change status link in the upper right corner of any of the Event sub-tabs.
3. Select the new status of the event.
  - a. Active – open for members to register. Also needed if you approve registrations.
  - b. Canceled
  - c. Closed
  - d. Sold Out
  - e. Testing – make changes to the set up
4. Click Save.
5. If you need to make any changes to the setup of the event, you will first need to set the Event Status back to Testing.



## Managers Registering A Member for an Event

1. Click on the Members tab in the navigation pane.
2. Search for the member you need to register for an event.
3. Click on the member's name in the search results.

Lead Name	First Name	Program Age	Email	Role	County	Primary Club	Last Active	Status	Registration
12	Leah	Child	leah@364u.com	Club Member	Kent	Stametsville Club	2018-2020	Approved	

4. Click Events in the navigation pane.

5. Click the +Register button.

6. Click on the name of the event the member is being registered for, and then click the next button.

Event Name	Start Date	End Date
Summer Fest Parade	Aug 22, 2020	Aug 23, 2020
Chili Cook-off	Aug 15, 2020	Aug 15, 2020

7. Click on the Registration Type the member is being registered as, and then click the Start Registration button.

Name	Role	Start Date	End Date
Youth Contestant	ClubMember	Jul 16, 2020	Aug 12, 2020

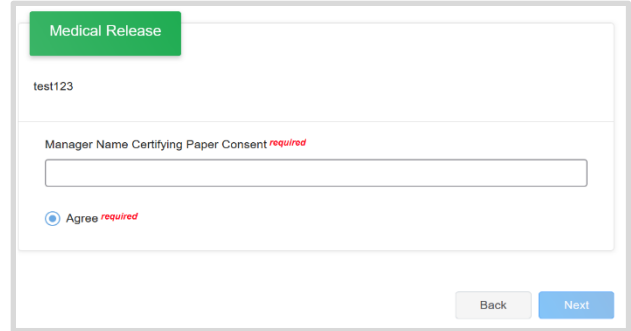
8. Complete the response for the Questions.

What is the base protein of your chili?

Fees

Total: \$0.00

9. Update the Health Form with any needed changes (if applicable). As a Manager, you will enter your own name in the electronic signature field indicating that you have received the signed paper copy of the health form.
10. Click the Next button.
11. Complete the Consents. Manager will enter their own name in the electronic signature field certifying they have received the signed paper consent form.
12. Click the Next button.



Medical Release

test123

Manager Name Certifying Paper Consent *required*

☒ Agree *required*

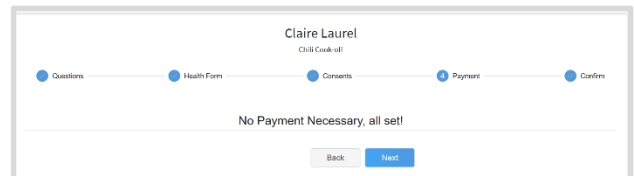
Back Next

13. If no payment is due, click the Next button

OR

If payment is due, it can either be paid directly in the county office, or a coupon code can be entered if the registration fee is sponsored by a donor. Click the Apply button next to the appropriate payment method. If the member is paying in the county office, the manager will get a pop-up window and the manager will need to click the Confirm button to proceed.

14. Click the Next button.

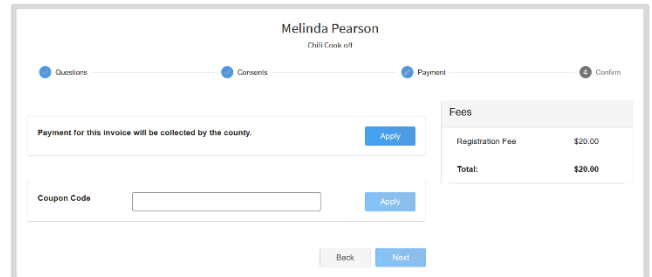


Claire Laurel  
Child Cook-off

Questions Health Form Consents **Payment** Confirm

No Payment Necessary, all set!

Back Next



Melinda Pearson  
Child Cook-off

Questions Consents **Payment** Confirm

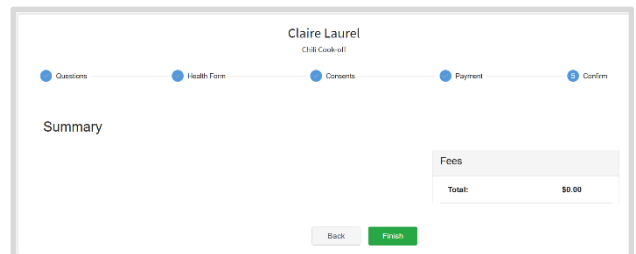
Payment for this invoice will be collected by the county.

Coupon Code

Fees	
Registration Fee	\$20.00
<b>Total:</b>	<b>\$20.00</b>

Back Next

15. Click the Finish button.



Claire Laurel  
Child Cook-off

Questions Health Form Consents **Payment** Confirm

Summary

Fees	
<b>Total:</b>	<b>\$0.00</b>

Back Finish

## Reviewing Submitted Event Registrations

1. Click on the Events tab in the navigation pane.
2. Click on the Submitted sub-tab.
3. Click on the name of a record to begin the review process.

Event Name	Last Name	First Name	Status	Type
Club Cook-off	Carson	By	Completed	Competition
Club Cook-off	Wagner	Clark	Completed	Competition

4. Review the Registration Type Details, Other Questions, Health Form – Medical Release, Consents, and Invoice Information (if applicable).

5. Managers may edit the Other Questions responses and the Invoice to apply a coupon if applicable.

6. There are three options for processing the event registration:

- a. Approve – accept the registration
- b. Send Back – enter comments and click Send Back to return the event registration to the member for corrections
- c. Block – Rejects the registration and does not allow the member to register again.