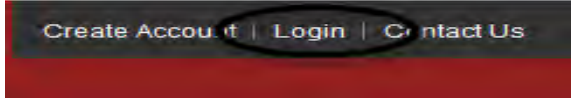


How To: Create an Event from a Template (Fee-Driven)

This documentation is designed to walk through the necessary steps to create a new event using a Fee-Driven Template. When using a template, some additional edits will need to be made. The Fee-Driven registration model is used for an event that charges a fee for attendance. The registrant will have to purchase a ticket (registration fee) in order to be registered. This event registration model can also have associated activities, with or without fees. By default, the form will include first name, last name and email address. ***This works best for events where there is a registration fee to attend.***



Create Account | Login | Contact Us

GETTING STARTED

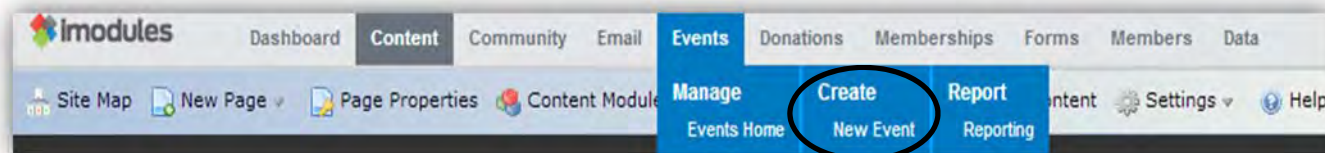
On the class, club or group's home page, go to the **LOGIN** link. Use your Infinite Connection username and password to login.

CREATE A NEW EVENT

There are two ways to create a new Event.

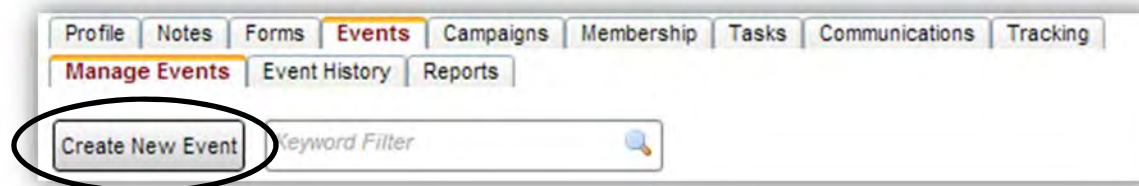
Option 1:

On the iModules Administrative Toolbar, go to the **Events** tab and select **Create New Event**.



Option 2:

On the iModules Administrative Toolbar, go to the **Events Home** page and select **Create New Event**.



Step 1: (Option 1)

On the iModules Administrative Toolbar, go to the **Events** tab and select **Create New Event**.

Step 1: (Option 2)

On the iModules Administrative Toolbar, go to the **Events Home** page and select **Create New Event**.

Please note: In order to choose the Fee-Driven Template, you must choose **Create New Event**.

ENTER: EVENT NAME, EVENT LISTING/CALENDAR AND AUDIENCE

Before you begin building your event, **ENABLE** the **TOGGLE ADVANCED MODE** by clicking on the text to view all of the available options. For the **EVENT LISTING/CALENDAR**, think about where the event should appear on your website. If you select **Event Listing**, your event will appear on the MIT Alumni Association's central calendar of events. If you select **Event Homepage Listing**, your event will appear on your website's homepage. You can select one or both listing types.

Toggle Advanced Mode

You have enabled the Advanced view. You will now see optional fields that give you greater control over your Event. This view may be modified by clicking on the text to view all of the available options. Any changes you make will be preserved if you toggle this view off.

Event Name:

Event Listing / Calendar: Use Ctrl or Shift keys to multi-select.

Custom URL:

Display Audience: Everyone Logged In Role

Form Audience: Everyone Logged In Role

Pre-populate user profile data from return link Include on the Template List for reuse Allow users to comment

User Comments:

If the event is for **ALUMNI ONLY**, Display Audience **MUST** be Everyone and Form Audience **MUST** be Logged In. * If the Display Audience is set to Logged In, the event **WILL NOT** appear on the MITAA Events Calendar.

Step 2: Event Name: Enter the full name of the event. The character limit is set at 75. **DO NOT** use punctuation.

Step 3: Event Listing/Calendar: Use Ctrl **OR** Shift to select Event Homepage Listing and/or Event Listing depending on where you want the event to appear.

Step 4: Custom URL: If you'd like, **ENTER** a friendly URL. This is typically used for printed materials.

Step 5: If the event is open to the public, check **Enable Identity Checkpoint for this form** to prompt users to verify their identity when they do not log in. When you select this option, the following will automatically be defaulted: Everyone, Allow unregistered users direct access to the form, and Log out non-members after form completion. **See Best Practice, Page 2, for more information.*

Step 6: Do Not Save Form Data if the user does not complete the form and **Display breadcrumbs** will be checked by default.

Step 7: Enable the **Pre-Populate user profile data from return link**, to include a link to the form in an email. This will take the user directly to the form with pre-populated profile data fields.

Step 8: The **Display Audience** determines access to the detail page for the event. Check **Everyone** so that everyone can see the details about the event.

Step 9: The **Form Audience** determines access to the actual registration form for the event. If the event is for alumni **ONLY**, check **Logged In**.

Step 10: Check **Include on the Template List for reuse** **ONLY** if you are creating a new template.

Each new form created provides a checkbox to enable the option to **Pre-populate user profile data from return link**. By default, this box will be unchecked. By enabling this option, you will be able to include a link to the form in an email, which will take the registrant directly to the form with pre-populated profile data fields without the user having to log in. Do this by:

1. Using the Event community content item in email marketing which will automatically include the link.
2. Creating a manual link by inserting the form URL using the Hyperlink Manager.

This email link is valid for seven (7) days. After seven days, data will not pre-populate on the form from the link in this email. When a recipient clicks on this email link, he/she will be brought to the site and will see a pop-up "welcome" message asking for user verification. If the user clicks to continue, the form will display with pre-populated data.

***Important note: If an email recipient forwards an email with pre-populated links, the new email recipient will get the same links and will be accessing the form with the sender's pre-populated data (if he/she selects the on-screen option to continue as the sender)**

BEST PRACTICE:

When setting up a new event from a template consider your audience:

- If the event is open to **alumni ONLY**, **Display Audience** must be **Everyone** (so that Event Preview and Event Description appear) and **Form Audience** must be **Logged In**. Once the user clicks the “register” button, he/she will be prompted to login.
- If the event is open to the **public**, **ALWAYS enable Identity Checkpoint**. When this is selected the Display Audience and Form Audience will default accordingly.
- If the event is open to both **alumni and the public**, **ALWAYS enable Identity Checkpoint**. **STRONGLY encourage** alumni to log in by adding rich text on the event description/registration page.

Please note: The Attendee List will follow the Display Audience. If the Display Audience is set to Everyone, the Attendee list will also be set to Everyone (public). Also, if the Display Audience is set to Logged In, the event WILL NOT appear on the MITAA Events Calendar.

Identity Checkpoint will try to match the email address, first name and last name to an existing constituent record in the Encompass database. If it finds a match, it will ask the registrant to confirm their information and then he/she can proceed with registration. **When Identity Checkpoint is enabled, the registrant will have 10 minutes to complete the first step.** This will avoid duplicate records from being created. Identity Checkpoint will keep the Encompass database records up-to-date and will ensure event registration details are captured in the alum’s record.

Step 11: Start Date/End Date: Enter the date the event starts and ends. **Quick fill tip: enter the letter “T” to populate today’s date.**

Step 12: Start Time/End Time: Enter the time the event starts and ends. **Quick fill tip: enter the letter “T” to populate the current time.**

Step 13: Time Zone: Enter the desired time zone. Be certain to check your class, club or group’s website to make sure the correct time zone has been selected.

Step 14: Display Range: Enter as the first date that the event should appear on your website. The event will be displayed **through 11:59pm** on the Display Range End Date selected.

Step 15: Click **Use an existing event template**.

Step 16: Hover over the icon to the left of the Template – **TEMPLATE: Fee-Driven Event** until **Clone Template** appears and then click on the icon to clone the template.

ENTER: START/END DATE, START/END TIME, TIME ZONE, DISPLAY RANGE

The screenshot shows a form with the following fields:

- Start Date: 8/31/2014
- End Date: 8/31/2014
- Start Time: 12:00 PM
- End Time: 1:00 PM
- Time Zone: (GMT - 05:00) Eastern Time (US & Canada) (ET)
- Display Range: 8/1/2014 to 8/31/2014

You will see the options for **EVENT TYPE**, be sure to scroll down and click on, **USE AN EXISTING EVENT TEMPLATE**. Click on the icon to the left of the **TEMPLATE: Fee-Driven Event** by hovering over it until **“Clone Template”** appears.

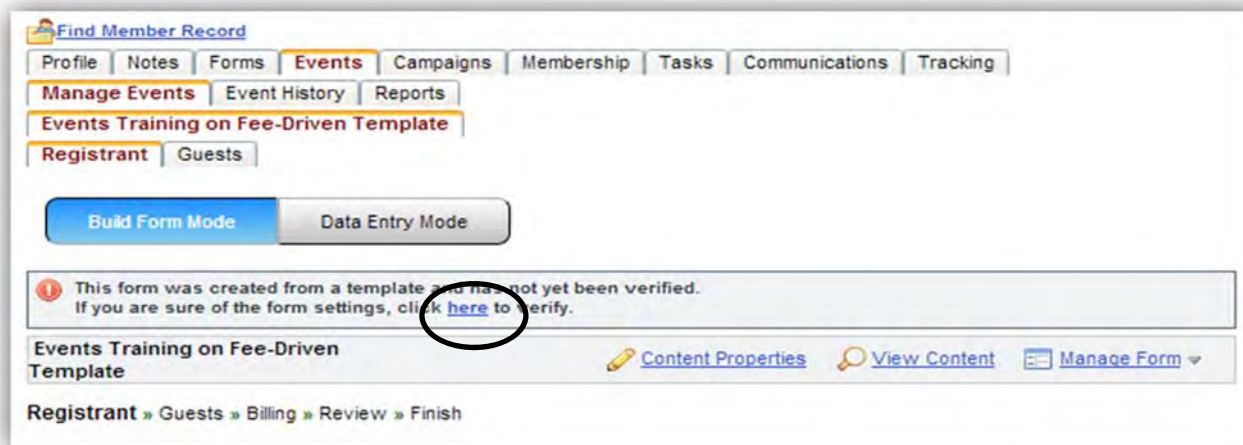
CHOOSE: EVENT TYPE

Name	Description	Date Created
Nora - Non Member Incomplete Data	Nora Test	3/12/2014 9:49:00 AM
Template - Simple RSVP (login required)	Template - Simple RSVP (login required)	9/25/2013 9:08:00 AM
TEMPLATE - Simple Ticket-Based	TEMPLATE for ticket-based events	3/14/2013 5:04:00 PM
TEMPLATE: Fee-Driven Event	TEMPLATE: Fee-Driven Event	7/22/2014 8:15:00 AM
Tracy Test13: Institute Diversity Summit	Tracy 1 (Limits: Steps, Activities, Commerce Items, Guests)	1/24/2014 11:45:00 AM

VERIFY FORM: ACTIVATES TEMPLATE

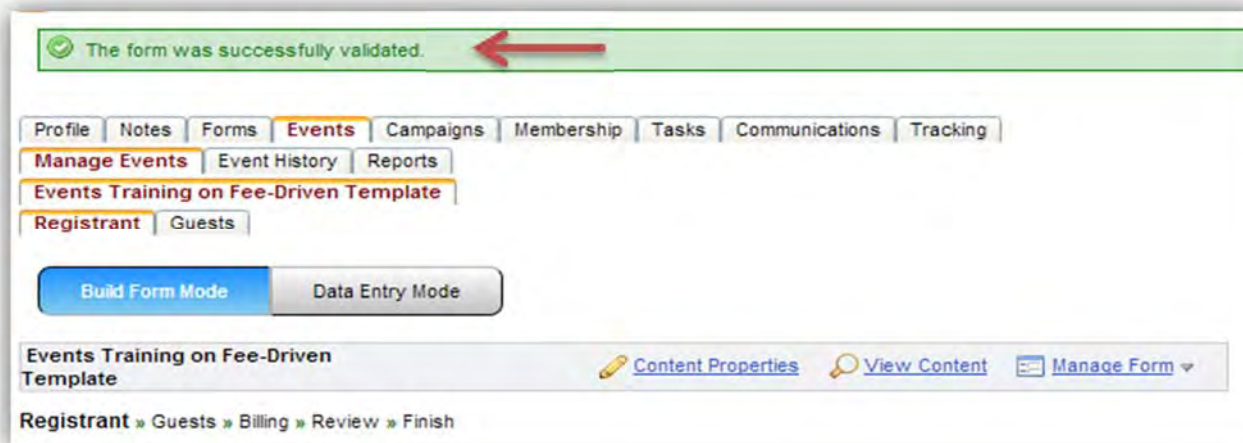
Once you have cloned the template, you will need to activate it before you are able to use it. To do this, click on the word [here](#) where it reads, “click [here](#) to verify.” This will activate the template. You will **ALWAYS** need to verify the form before you are able to proceed. An exclamation mark will appear within a red circle at the top as a reminder to verify the form before use.

Step 17: Click on the word [here](#) where it reads, “click [here](#) to verify.” This will activate the template.



The screenshot shows the 'Find Member Record' interface. At the top, there are navigation tabs: Profile, Notes, Forms, Events, Campaigns, Membership, Tasks, Communications, and Tracking. Below these are sub-tabs: Manage Events, Event History, Reports, Events Training on Fee-Driven Template, Registrant, and Guests. There are two buttons: 'Build Form Mode' (highlighted in blue) and 'Data Entry Mode'. A warning message is displayed in a light blue box: 'This form was created from a template and has not yet been verified. If you are sure of the form settings, click [here](#) to verify.' The word 'here' in the message is circled in black. Below the warning, there are links for 'Content Properties', 'View Content', and 'Manage Form'. At the bottom, there is a breadcrumb trail: Registrant » Guests » Billing » Review » Finish.

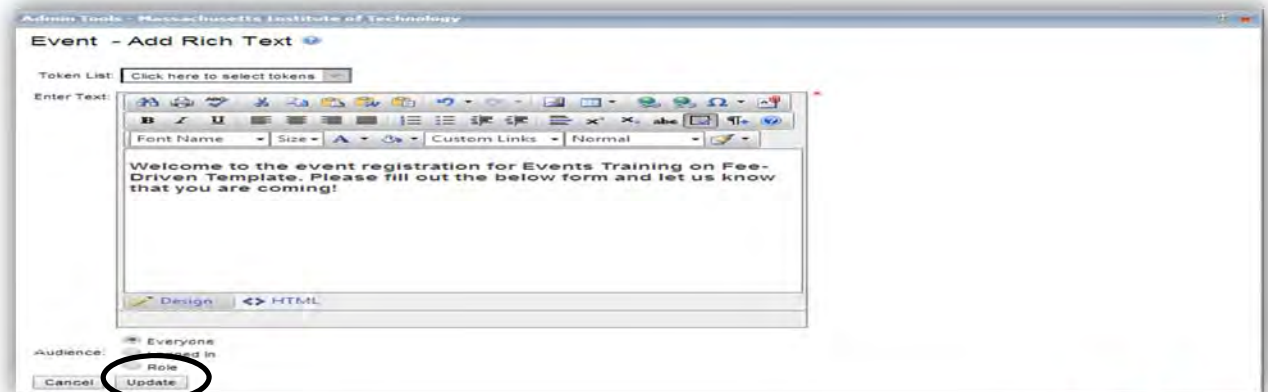
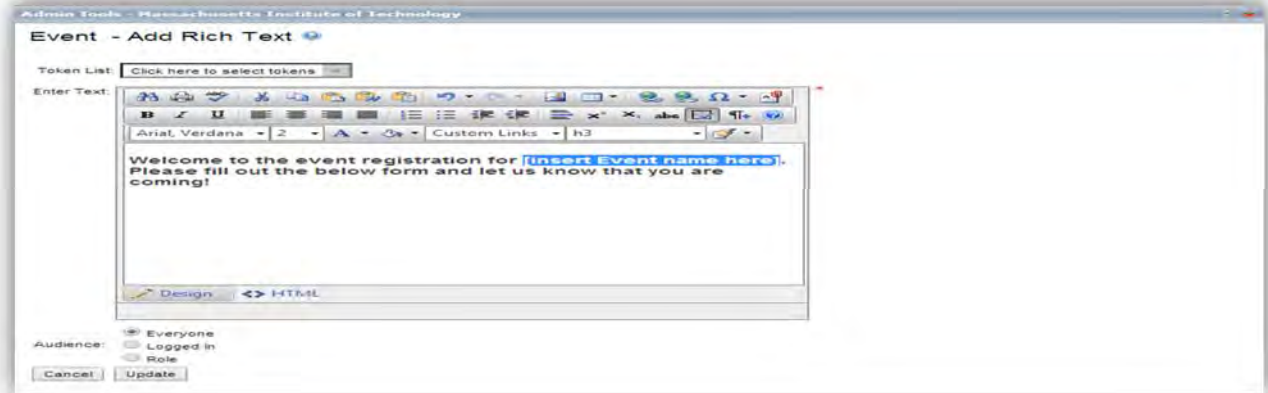
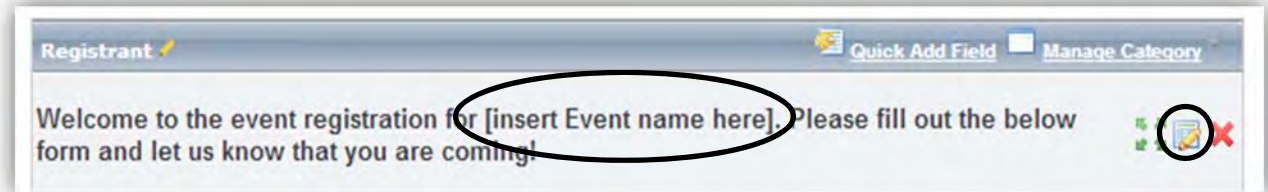
Once you have clicked on the link, you will receive the green confirmation message below.



The screenshot shows the same 'Find Member Record' interface as above, but with a green confirmation message at the top: 'The form was successfully validated.' A red arrow points to this message. The rest of the interface, including the navigation tabs, sub-tabs, buttons, and breadcrumb trail, remains the same.

UPDATE: REGISTRANT INFORMATION

The Registrant Information acts as a welcome message to registrants. The information in brackets is default text carried over from the template and needs to be updated with the new Event name.



Step 18: Under **Registrant Info**, click on the pencil icon to **Edit Field**. In the line "Welcome to..." replace [insert Event name here] with the name of the event.

Step 19: Remove the [insert Event name here] text by highlighting the text and pressing the **Delete** key.

Step 20: Enter the Event name.

Step 21: Click **Update**.

UPDATE: CONTENT PROPERTIES (Reg Date Range, Event Preview/Description, Contact, Location, Directions)

Step 22: Click **Content Properties**.

Step 23: Enter **Registration Date Range**. This is the date range you want to allow registration to occur. Registration will be active **through 11:59pm** on the Registration Date Range End Date selected.

Step 24: Guests. By default, the **Allow registrants to bring guests** will be checked. If primary registrants are allowed to bring guests, leave this as is. If guests will not be allowed, deselect this option.

Step 25: Click on **Enable Registration Limit across all registrants, if applicable**.

Step 26: Enter **Total Registration Limit across all registrants (which INCLUDES guests)**.

Step 27: Click on **Enable Registration Limit for each primary registrant**.

Step 28: Under **Features**, check **Attendees List**. If this is selected this will add the feature for the primary registrant to view all currently registered attendees on the Event Detail Page. **Please note: The Attendee List will follow the Display Audience. If the Display Audience is public, the Attendee List will also be public.**

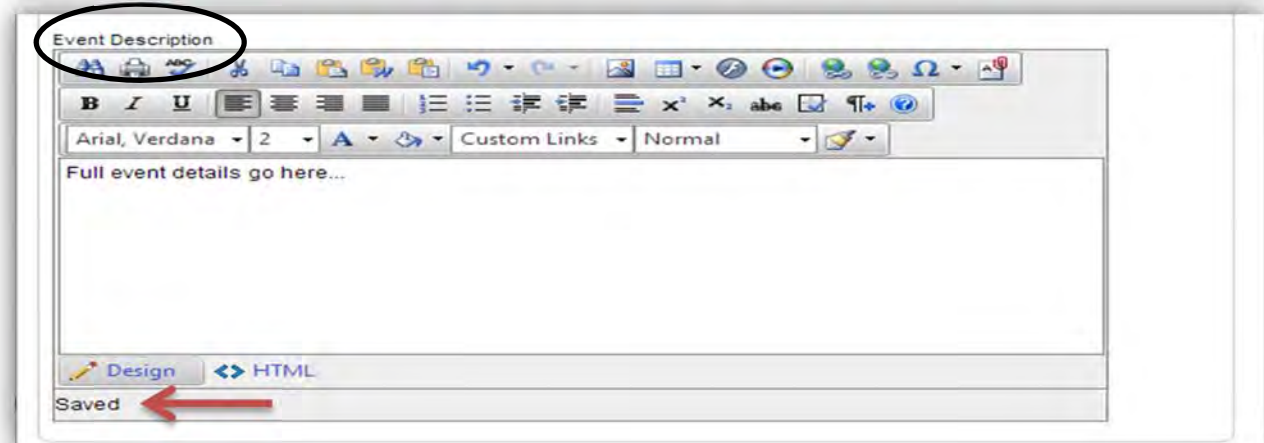
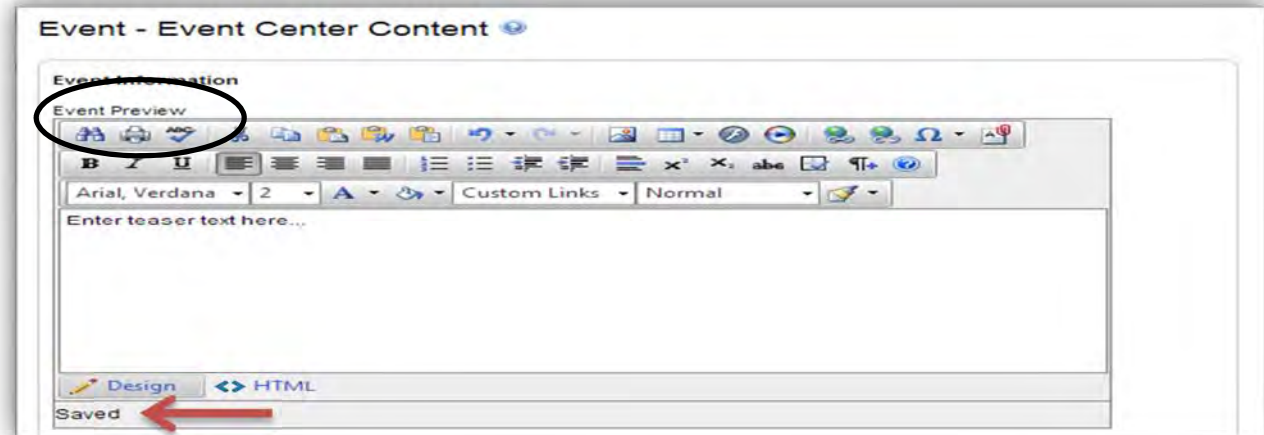
Step 29: Click **Save**.

The screenshot shows the 'Content Properties' page for an event template. At the top, there are two tabs: 'Build Form Mode' (selected) and 'Data Entry Mode'. Below the tabs, the event title 'Events Training on Fee-Driven Template' is displayed. A navigation bar contains 'Content Properties' (circled in black), 'View Content', and 'Manage Form'. A breadcrumb trail reads 'Registrant » Guests » Billing » Review » Finish'. The 'Registration Settings' section (circled in black) includes 'Start Date: 8/1/2014' and 'End Date: 8/31/2014'. Under 'Guests', there are three checked options: 'Allow registrants to bring guests', 'Enable Registration Limit across all registrants' (with a 'Total Registration Limit across all registrants' input field set to 50), and 'Enable Registration Limit for each primary registrant' (with a 'Registration Limit per registrant' input field set to 2). Under 'Features', the 'Attendees List' option is unchecked. At the bottom, there are 'Cancel' and 'Save' buttons, with the 'Save' button circled in black.

Once you save the changes, the **Event Center Content** page will appear. This page will allow you to enter the Event Preview, Event Description, Event Planner Contact Information, Location and Directions.

Step 30: Event Preview: Enter a teaser of the event.

Step 31: Event Description: Enter the full details of the event. Consider including: event topic, abstracts, speaker picture/bio, timeline of event, menu, company logos and/or sponsors.



Please note: The auto-save feature saves a version of the work in the editor every two minutes. When you log back into Encompass you have the option to continue working with the latest version. This feature works on both the admin side of Encompass (Events, Donations, Memberships, Forms and Email) and the CMS side of Encompass. This feature ONLY works in the Edit mode. For example, if adding rich text to a form and logged out because the session expires, the unsaved content is not saved. It would be saved if editing rich text that was already on the page.

Step 32: Contact(s): Enter the Event Contact(s)/ Coordinator(s) contact information.

Step 33: Location: Enter the Location Name where the Event is being held. Use the content editor to add directions and/or links to map websites to help inform Event attendees of its location.

Step 34: Click **Next**.

BEST PRACTICE:

ALWAYS do your formatting within the Encompass content editor. However, if you are copying and pasting in content, you **MUST** first use Notepad or a similar software application in order to remove all html formatting.

The screenshot displays two contact forms, 'Contact 1' and 'Contact 2', and a location form. Each contact form includes fields for First Name, Last Name, Title, Address, Address 2, City, State, Postal Code, Phone, Fax, and E-mail. The location form includes a 'Location Name' field and a 'Directions' field with a rich text editor toolbar. The toolbar contains icons for undo, redo, bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, and a 'Custom Links' dropdown. Below the toolbar are dropdowns for 'Font Name', 'Size', and 'Normal'. At the bottom of the location form, there are 'Design' and 'HTML' tabs. A 'Next >>' button is circled in black at the bottom left of the location form area.

UPDATE: MEMBER CONFIRMATION EMAIL (from name, from e-mail, confirmation subject)

The Member Confirmation Email is the confirmation that a registrant will receive upon registration that includes all event details.

Step 35: Go to **Manage Form** and select **Member Confirmation Email**.

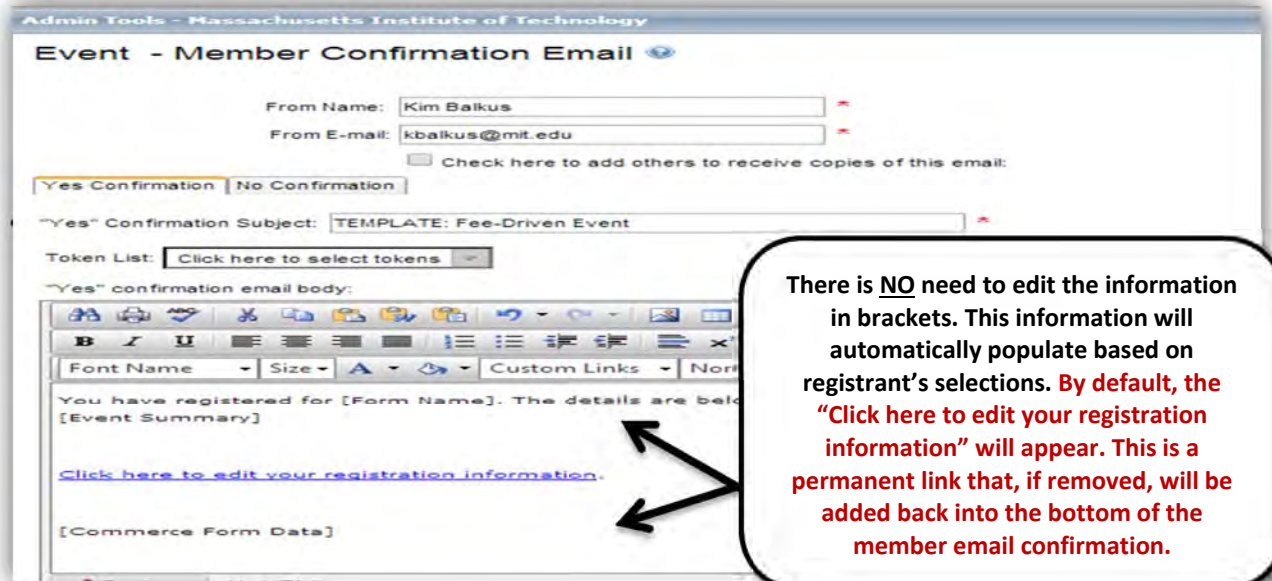
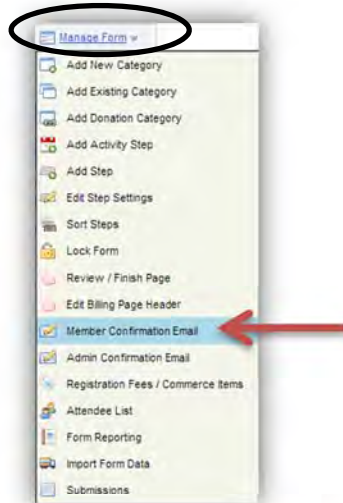
Step 36: Always review the **From Name** to update, if needed.

Step 37: Always review the **From E-mail** to update, if needed.

Step 38: In the **Yes Confirmation Subject** box, replace **Template: Fee-Driven Event** with the actual name of the event.

Step 39: Click on the **No Confirmation** tab. In the **No Confirmation Subject** box, replace **TEMPLATE: Fee-Driven Event** with the actual name of the event.

Step 40: **DON'T** modify the text in brackets in the **Member Confirmation Email** as it will automatically populate to provide registrant with basic event details.



BEST PRACTICE: In the From Name field, **ALWAYS** use the club, class or group's name.

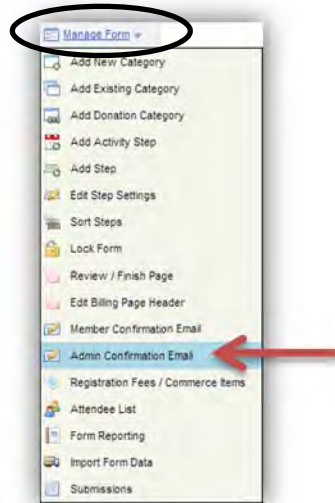


Step 41: Click **Save**.

UPDATE: ADMIN CONFIRMATION EMAIL (*from name, from e-mail, admin notification subject*)

The Admin Confirmation Email is the confirmation that an Event Administrator will receive each time there is a registration for an event. The Event Administrator should decide if they would like this enabled as it is **NOT** required.

Step 42: Go to **Manage Form** and select **Admin Confirmation Email**.



Step 43: Always review the **From Name** to update, if needed.

Step 44: Always review the **From E-mail** to update, if needed.

Step 45: If you'd like to add others to receive a copy of the Admin Confirmation Email, enter the email address into the **Admins who will receive the email** box and click the **Add** button. Make sure the email address that was added appears in the box below. If you wish to remove an email address, click on the email address then select **Remove**.

Step 46: In the **Admin Notification Subject** box, replace **TEMPLATE: Fee-Driven Event** with the actual name of the event.

Step 47: Use the **Tokens** to personalize the **Admin Notification Subject** or the **Confirmation Email Body** by using data field tokens. **See Appendix C, Page 28, for more information.*

Step 48: Click **Save**.

Admin Tools - Massachusetts Institute of Technology

Event - Admin Confirmation Email

Admin Confirmation Email Enabled

From Name: Kim Balkus *

From E-mail: kbalkus@mit.edu *

Admins who will receive the email:

Add *

kbalkus@mit.edu Remove

Admin Notification Subject: TEMPLATE: Fee-Driven Event *

Token List: Click here to select tokens

Confirmation Email Body:

Dear Administrator,

##First Name## ##Last Name## (##CONSTITUENT ID##) has completed the ##Form

Cancel Save

No need to edit the information in brackets. This information will automatically populate based on registrant's selections. The [Event Summary] will include the date and information that's located in the Location Name field.

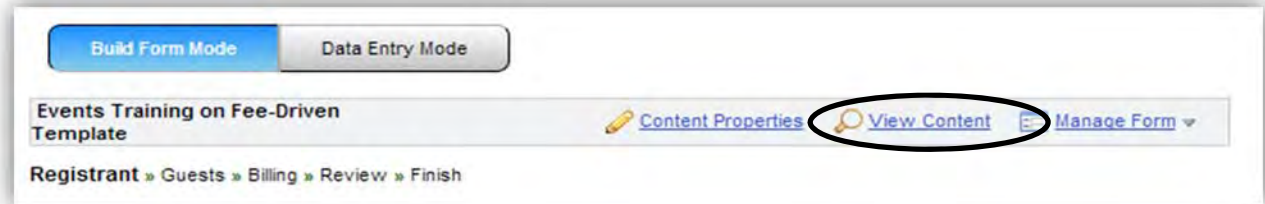
BEST PRACTICE:

DON'T modify the text in brackets in the **Admin Confirmation Email** as it will automatically populate to provide the Event Admin with the registrant's basic event details.

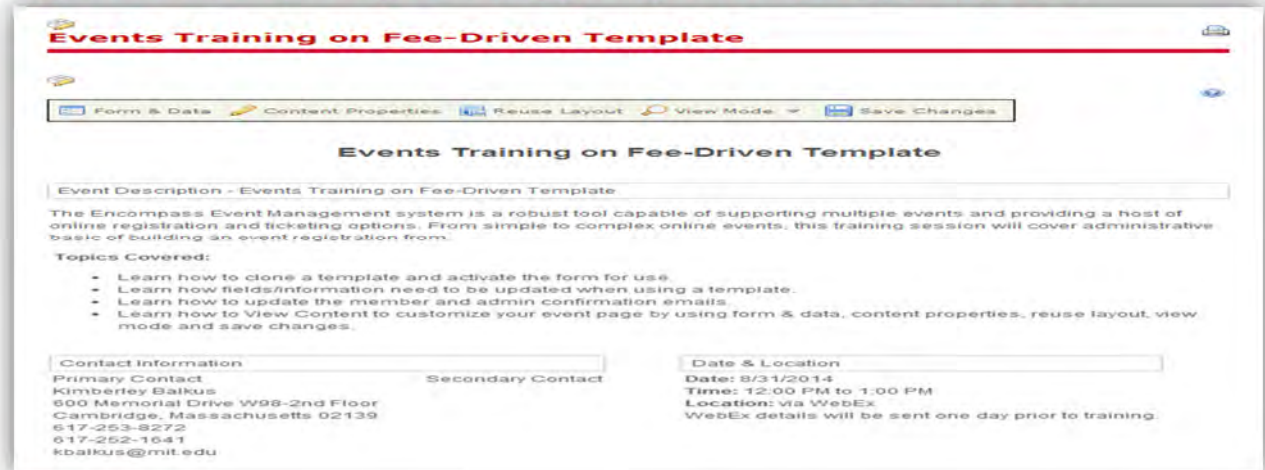
REVIEW: EVENT PAGE (update, if needed)

View Content will allow you to look at the registration details, information and layout as the registrant will see it.

Step 49: Click **View Content** to review the Event page which will include all registration details.



The Event Detail Page will now look like the one below. There will always be the full title at the top of the page, which is system generated when first setting up the event. The title will appear at the top, above the Registration Button and in a box right underneath. This can be adjusted in front size, color and format by clicking on **View Mode**, then selecting **Layout Edit**. *If you'd like to edit the format of the Event page, please follow the steps in Appendix D, Page 29.*



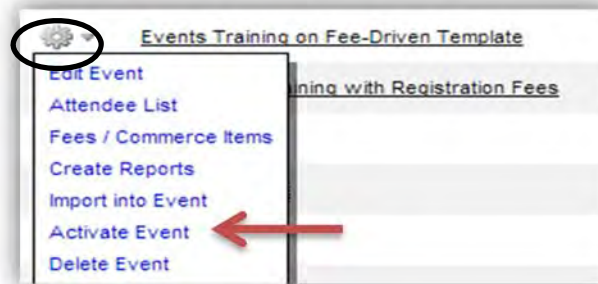
BEST PRACTICE:

If the Event Name is changed **AFTER** the event has been initially created, the change will not be reflected at the top of the page. This will need to be updated by going to the iModules Administrative Toolbar, selecting Page Properties and updating the Page Title field to the new event name.

ACTIVATE/DE-ACTIVATE EVENT

There are **TWO** things that **MUST** be exact for your event to show on your class, club or group's website.

1. On the **Events Home** page, the "Status" of the event in the events grid **MUST** be listed as Active. If it is not Active, click on the drop-down menu to the right of the cog wheel and select **Activate Event**.



2. The date must be **ON OR AFTER** the start date of the registration date range that you created during the setup. The registration button will appear once the Registration Date Range is active.

The registration button will appear above the content of the Event Page, to the left of the Attendee List button, when both of these occur. The Attendee List button will **ONLY** appear once the first person has registered for the event.

Please Note: If you want to stop registrations for any reason at any time, simply De-activate the event; otherwise, registration will end once the capacity or end date has been reached.

Did you update the following?

- UPDATE: Event Preview, Event Description, Event Contact(s) and Location (Page 7)
- UPDATE: Member Confirmation Email (Page 9)
- UPDATE: Admin Confirmation Email, if needed (Page 10)

Additional Information is provided on the following:

- APPENDIX A: Registration Form: Add New Field or Add Existing Field (Page 14)
- APPENDIX B: Registration Fees: Add Edit and Delete (Page 17)
- APPENDIX C: Using Tokens in the Admin Confirmation Email (Page 28)
- APPENDIX D: Review, Edit and Format Event Page (Page 29)

APPENDIX A

REGISTRATION FORM: ADD NEW FIELD OR ADD EXISTING FIELDS (if needed)

At this point, the registration form looks like the one below. You can **Add New Field** or **Add Existing Field** to a template that has already been created or just use the template as is.

Step 1: If needed, **Add New Field** and/or **Add Existing Field** (*Business Employer, Business Job Title, Nickname, etc.*) by clicking on **Manage Category**.

The screenshot shows a web interface for building a registration form. At the top, there are tabs for 'Build Form Mode' and 'Data Entry Mode'. Below this, the form is titled 'Events Training on Fee-Driven Template' and includes navigation links for 'Content Properties', 'View Content', and 'Manage Form'. A breadcrumb trail shows 'Registrant' > 'Guests' > 'Billing' > 'Review' > 'Finish'. The main section is 'Main Registrant Step', with a note that fields added here will be available on the 'Guest Information Step'. Below this is a preview of the 'Registrant' form, which includes fields for 'First Name' (Kimberley), 'Last Name' (Balkus), and 'Email Address' (kbalkus@mit.edu). A 'Registration Fee' dropdown menu is also visible. A 'Manage Category' dropdown menu is open over the form, showing options for 'Category Settings', 'Add Rich Text', 'Add New Field', and 'Add Existing Field'. A callout box with arrows pointing to the 'Add New Field' and 'Add Existing Field' options contains the text 'Add New or Existing Fields.'

Add New Field

Step 1: Select **Add New Field** under **Manage Category**.

Step 2: Enter **Field Name**. This is the name visible to Admins when searching the database. It will default to being the Display Name as well if a different Display Name is not entered.

Step 3: Enter **Display Name**. The Display Name should be a more user-friendly version of the Field Name that the registrant will see.

Step 4: Change **Audience**, if needed. By default, it will be set to Everyone.

Step 5: Select **Data Field Type**.

Step 6: Click **Next**.

Admin Tools - Massachusetts Institute of Technology

Event - Registrant - Add Field

Field Name: *

Display Name:

Make this field required:

Show Advanced Options: ←

Search Name: *

Export Column Header Name: *

Custom Profile Label:

Token Name:

Allow cloning of this field:

Active Date Range: to

Please note: If adding ONLY one New Field to the form, the Export Column Header Name (available under Show Advanced Options) should have a unique description. Although the same Field Name can be used on different forms all Export Column Header Names should have a unique description. If multiple new fields are added to the form, the Field Name AND Export Column Header Name must have unique descriptions.

Audience: Everyone
 Logged In
 Role

Data Field Type: *

Data Storage Mode: Normal
 Instanced
 Reusable Instanced

Associate a Role with this Field:

Cancel

Add Existing Field

Step 1: Select **Add Existing Field** under **Manage Category**.

Step 2: Add Existing Fields by clicking on the **Quick Field List** and then type in search criteria for that field. For example: If you want to add the job title, type in the word, "Title" in the **Available Fields** search box to see all available fields that have the word, "Title" in the name. Then select the field you would like to use by clicking on it and it will be added under **Selected Fields**. You can sort the order in which the fields appear by going to the fields that you've added under Selected Fields, holding down the mouse and dragging and dropping them as needed.

Step 3: Click the **Add Selected Fields** button.

Step 4: To move or remove the fields from your form use the **edit controls** to the right of the field you would like to move or remove.

The selected fields that you have chosen to add will be added to the bottom of the form. To move or remove the fields from your form use the edit controls to the right of the field you would like to move or remove.

BEST PRACTICE:

Existing fields are from the database. **DON'T modify any of the field properties.** Always search for an existing field first before adding a new field.

APPENDIX B

REGISTRATION FEES: ADD, EDIT, AND DELETE (if needed)

ADD Registration Fees

Step 1: Go to **Registration Fee** field to edit field.

Step 2: If needed, update the specifics of each **registration fee** (*display name, price, etc.*) on your event form, by using the edit controls to the right of the field (*move field, edit field, delete field*).



Add/ Edit
Registration Fees.

On the Event – Registration Field Edit page, Click **Next**.

Admin Tools - Massachusetts Institute of Technology

Event - Registrant Field Edit

Registration Field: This field drives Registration/Attendee List

Field Name: *

Display Name:

Make this field required:

Show Advanced Options:

Audience: Everyone
 Logged In
 Role

Data Field Type: *

Description:

Include in Required Purchase Grouping:

Registrant Limit:

Overall Limit:

Utilize Fair Market Value:

Cancel **Next>>**

Step 3: On the Event – Registration Field Edit page, Click **Next**.

All Event Registration Fees will appear in the grid. If more Registration Fees need to be added, edited or deleted, use the drop-down menu to the right of the cog wheel.

Step 4: On the Commerce – Prices/Fees page, click **Add Price/Fee.**

Admin Tools - Massachusetts Institute of Technology

Commerce - Prices / Fees

[Add Price / Fee](#) [Sort Priority](#)

	Label	Price	Registrant Limit	Overall Limit	Start Date	End Date	Audience	Priority
	Current Member	\$5.00					Custom	1
	MIT Alum	\$10.00					Everyone	2
	MIT10	\$10.00					Everyone	3
	MIT Student	\$0.00					Everyone	4
	General Audience	\$15.00					Everyone	5

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[Back](#) [Finish](#)

Step 5: Enter **Label**. This will be the name of the registration fee option.

Step 6: Enter **Price**.

Step 7: **MOST** registration fee options will be set to Everyone. However, this is a “Non-Member Ticket” based on dues paid membership. As a result the audience should be set to **Role**. **The role-based audience setting ONLY works if the registrant is logged in when completing the event registration form so that the system recognizes that their membership is up-to-date.**

Step 8: From the list of roles, scroll down to the options that are alphabetically listed and start with **MEM**. Choose all membership levels that should be able to see this registration fee option. OR deny access to members so that they don’t see something like a “Non-Member” registration fee.

Step 9: Highlight the role in the list of roles on the left, and click on the double arrow to move it over to the window on the right.

Step 10: Click **Save**.

Admin Tools - Massachusetts Institute of Technology

Commerce - Add or Edit Price / Fee

Label *
Non-Member Ticket

Price *
\$ 30.00

Custom SKU
[]

Registrant Limit
[]

Overall Limit
[]

Limit the availability of this price to a specified date range

Which members should have access to this price?

Everyone
 Logged In
 Role

AA Alumni
AA Associate Members - Restricted
AA Board Members - Restricted
AA Class Agents - Restricted
AA Class Officers

Deny access to the following:
Member Admin
Membership Admin
MembershipAdmin
Message Board Admin
MIT Educational Counselors - Restricted

MEM - TCS - Contributing

Cancel Save

Registrant Limit: The limit per registrant for each fee.

Overall Limit: The overall limit for each fee.

Limit the availability of this price to a specified date range: Allows you to create a date-driven fee (i.e., discounted price for early bird registration).

Which members should OR should NOT have access to this price?: This will be the audience that will be able to view this registration fee option.

EDIT Registration Fees

Step 1: Go to **Registration Fee** field to edit field.

Step 2: If needed, update the specifics of each **registration fee** (*display name, price, etc.*) on your event form, by using the edit controls to the right of the field (*move field, edit field, delete field*).

A screenshot of a web-based registration form editor. At the top, there are two tabs: "Build Form Mode" (selected) and "Data Entry Mode". Below the tabs, the page title is "Events Training on Fee-Driven Template" with links for "Content Properties", "View Content", and "Manage Form". A breadcrumb trail shows "Registrant" > "Guests" > "Billing" > "Review" > "Finish". A blue banner reads "Main Registrant Step" with a note: "If you are collecting guest information, fields added here will be available for use on the Guest Information Step. Email address must be on the first step of the form." The main form area is titled "Registrant" and contains a welcome message. Under "Registrant Information", there are input fields for "First Name" (Kimberley), "Last Name" (Balkus), and "Email Address" (kbalkus@mit.edu). Below these is a checkbox for "Please do not show name on the attendee list". Under "Registration Fee", there is a dropdown menu currently set to "Please Choose...". To the right of this dropdown are three edit controls: a green arrow, a blue pencil, and a red 'X'. A callout box with an arrow points to these controls, containing the text "Add/ Edit Registration Fees." At the bottom, there is a "Form Navigation" section with a yellow warning box that says "Please select Data Entry Mode to fill out this form." and a "Save and Continue" button.

Add/ Edit
Registration Fees.

On the Event – Registration Field Edit page, Click **Next**.

Admin Tools - Massachusetts Institute of Technology

Event - Registrant Field Edit

Registration Field: This field drives Registration/Attendee List

Field Name: *

Display Name:

Make this field required:

Show Advanced Options:

Audience: Everyone
 Logged In
 Role

Data Field Type: *

Description:

Include in Required Purchase Grouping:

Registrant Limit:

Overall Limit:

Utilize Fair Market Value:

Cancel **Next>>**

Step 3: On the Event – Registration Field Edit page, Click **Next**.

Step 4: Go to the registration fee that needs to be edited. Click on the drop-down menu to the right of the cog wheel and select **Edit**.

Step 5: Edit Label, Price, Registrant Limit, Overall Limit, Limit the availability of this price to a specified date range and change the audience if Member or Non-Member registration fees.

Step 6: Click **Save**.

	Label	Price	Registrant Limit	Overall Limit	Start Date	End Date	Audience	Priority
	Current Member	\$5.00					Custom	1
Edit	MIT Alum	\$10.00					Everyone	2
	MIT T10	\$10.00					Everyone	3
	MIT Student	\$0.00					Everyone	4
	General Audience	\$15.00					Everyone	5

Label *
MIT Alum

Price *
\$ 10.00

Custom SKU
[]

Registrant Limit
[]

Overall Limit
[]

Limit the availability of this price to a specified date range

Which members should have access to this price?
 Everyone
 Logged In
 Role

Cancel Save

DELETE Registration Fees

Step 1: Go to **Registration Fee** field to edit field.

Step 2: If needed, update the specifics of each **registration fee** (*display name, price, etc.*) on your event form, by using the edit controls to the right of the field (*move field, edit field, delete field*).



Build Form Mode | Data Entry Mode

Events Training on Fee-Driven Template [Content Properties](#) [View Content](#) [Manage Form](#)

Registrant » Guests » Billing » Review » Finish

Main Registrant Step
If you are collecting guest information, fields added here will be available for use on the Guest Information Step. Email address must be on the first step of the form.

Registrant [Quick Add Field](#) [Manage Category](#)

Welcome to the event registration for Events Training on Fee-Driven Template. Please fill out the below form and let us know that you are coming!

Registrant Information

First Name *

Last Name *

Email Address *

Please do not show name on the attendee list

Registration Fee
Please select the appropriate registration fee from the drop-down menu.

Registration Fee *

Form Navigation

Please select Data Entry Mode to fill out this form.

Save and Continue

Add/ Edit Registration Fees.

On the Event – Registration Field Edit page, Click **Next**.

Admin Tools - Massachusetts Institute of Technology

Event - Registrant Field Edit

Registration Field: This field drives Registration/Attendee List

Field Name: *

Display Name:

Make this field required:

Show Advanced Options:

Audience: Everyone
 Logged In
 Role

Data Field Type: *

Description:

Include in Required Purchase Grouping:

Registrant Limit:

Overall Limit:

Utilize Fair Market Value:

Cancel **Next>>**

Step 3: On the Event – Registration Field Edit page, Click **Next**.

Step 4: Go to the registration fee that needs to be deleted. Click on the drop-down menu to the right of the cog wheel and select **Delete**.

Admin Tools - Massachusetts Institute of Technology

Commerce - Prices / Fees

Add Price / Fee | Sort Priority | Keyword Filter

Label	Price	Registrant Limit	Overall Limit	Start Date	End Date	Audience	Priority
Current Member	\$5.00					Custom	1
MIT Alum	\$10.00					Everyone	2
MIT Alum T10	\$10.00					Everyone	3
MIT Student	\$0.00					Everyone	4
General Audience	\$15.00					Everyone	5

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<<Back | Finish

Step 5: Select **OK**.

The page at <https://adminlb.imodules.com> says:

Are you sure you want to delete price MIT Alum?

OK | Cancel

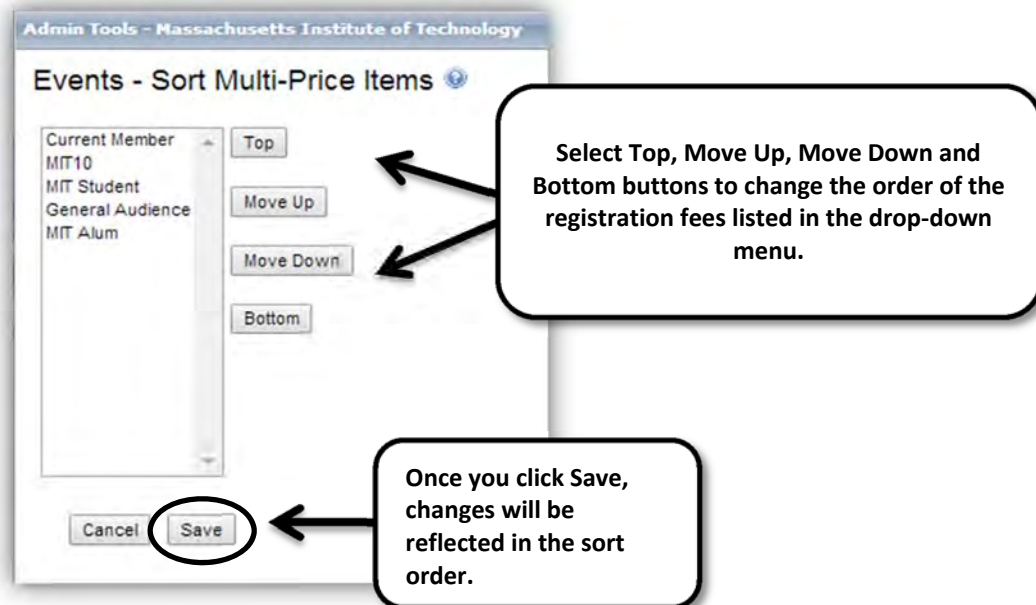
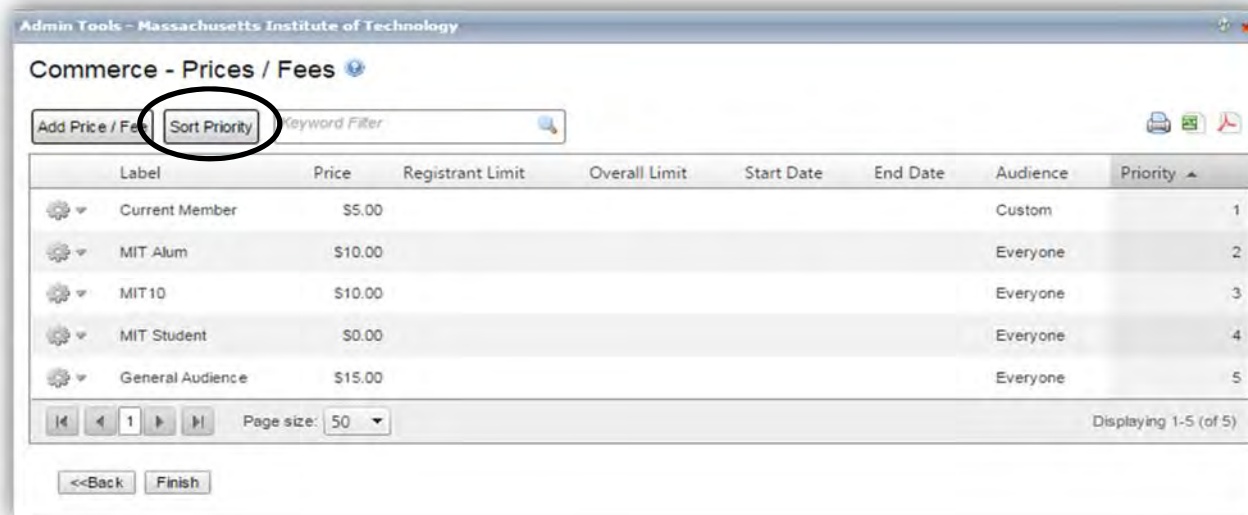
SORT Priority of Registration Fees

Step 1: Once all registration fees have been added, edited or deleted, use the **Sort Priority** button to sort the order of how the registration fee options will appear in the drop-down menu.

Step 2: Select **Sort Priority**.

Step 3: Use the **Top**, **Move Up**, **Move Down** and/or **Bottom** buttons to change the order of the registration fees listed in the drop-down menu.

Step 4: Click **Save**.



APPENDIX C

USING TOKENS: ADMIN CONFIRMATION EMAIL: (if needed)

Use **Tokens** to personalize the **Admin Notification Subject** text and/or use the **Token List** to personalize the Confirmation Email Body by using data field tokens. Tokens have two '#' signs before and after the actual field name. For example: Last Name can be used as a token and is indicated with ##Last Name##. This will allow the Event Administrator to easily search their email box for a particular registrant.

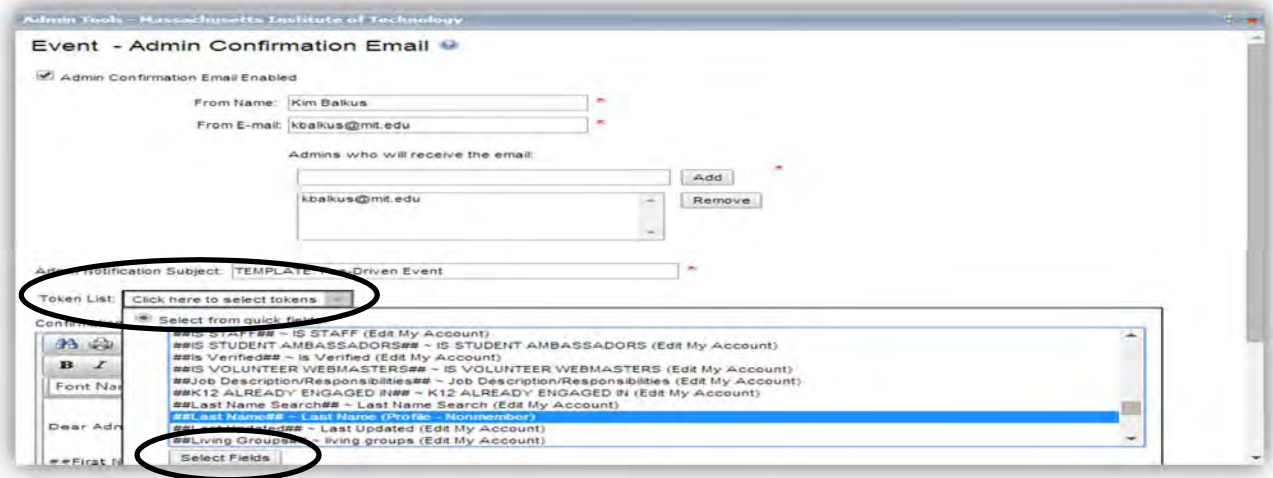
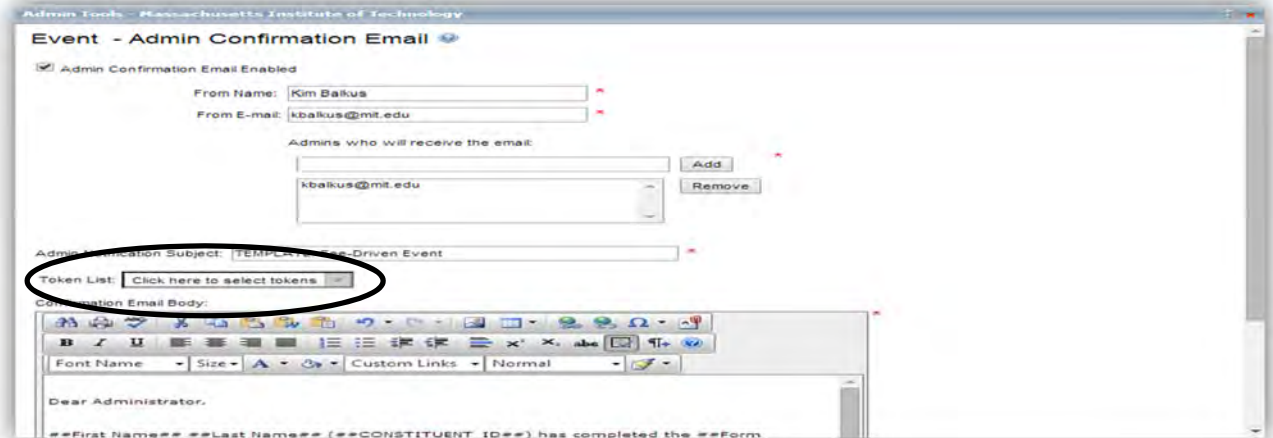
Step 1: To add a token to the **Admin Notification Subject** box, type in two '#' signs before and after the actual field name.

Step 2: To add a token to the **Confirmation Email Body**, click the **Token List** drop-down menu.

Step 3: Use the scroll bar to the right to find the token you would like to use.

Step 4: Click on the token so that the text is highlighted in blue.

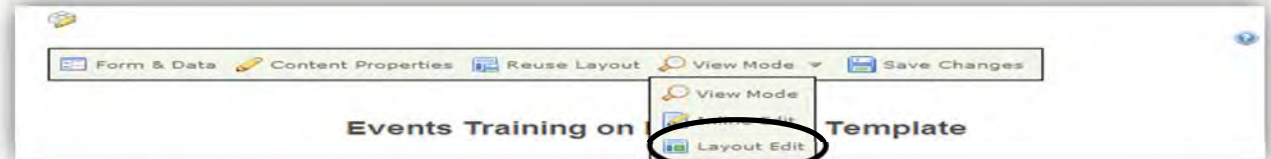
Step 5: Click **Select Fields**.



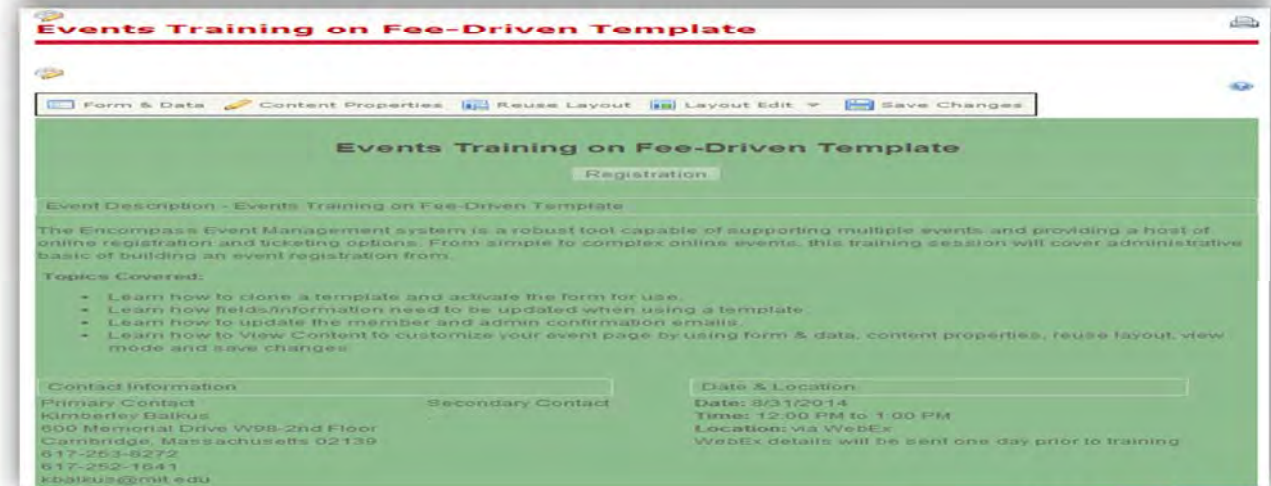
APPENDIX D

REVIEW, EDIT AND FORMAT EVENT PAGE (if needed)

Step 1: Click on **View Mode** and then select **Layout Edit**.



Step 2: To remove the box at the top of the page under the Registration button, if desired, click anywhere in the top left-hand corner of the page until the entire page turns green. This will prompt the table properties to appear in the **Modify Layout** window.



Step 3: In the **Event Description – [[Event Name]]** row, right-click to view the menu to make edits to the table.

Step 4: Select **Delete Row**.

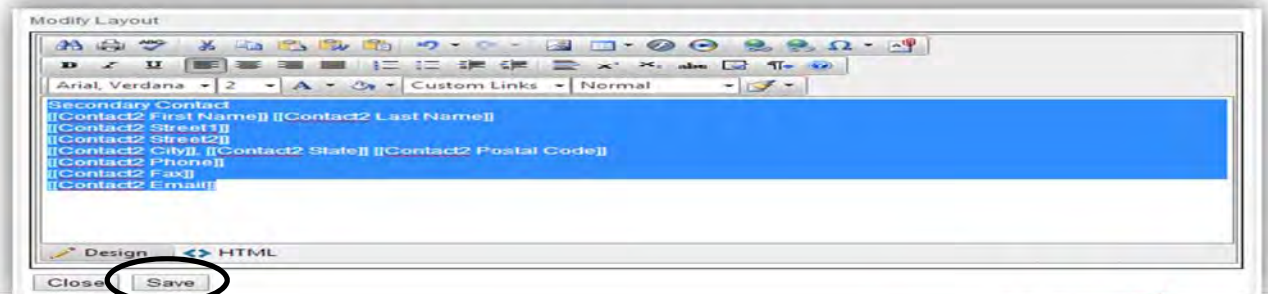
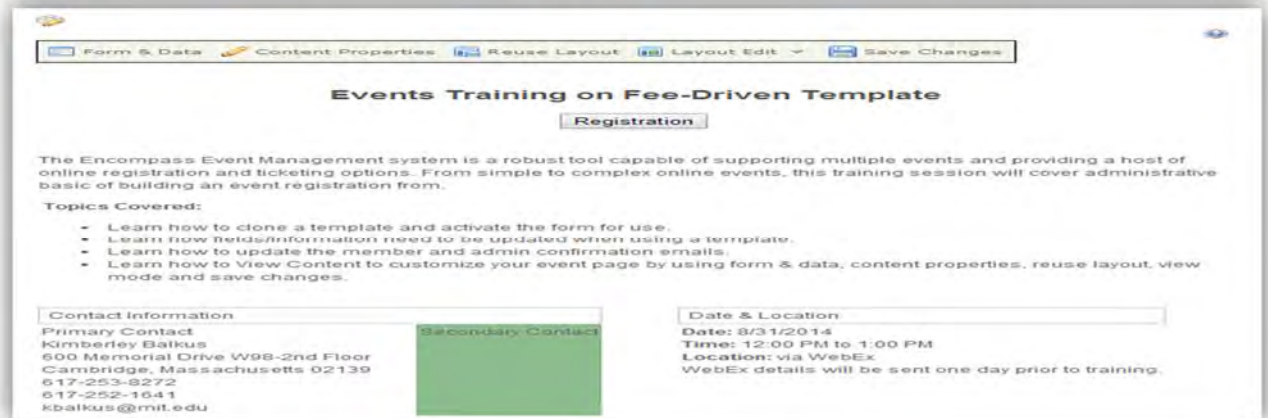
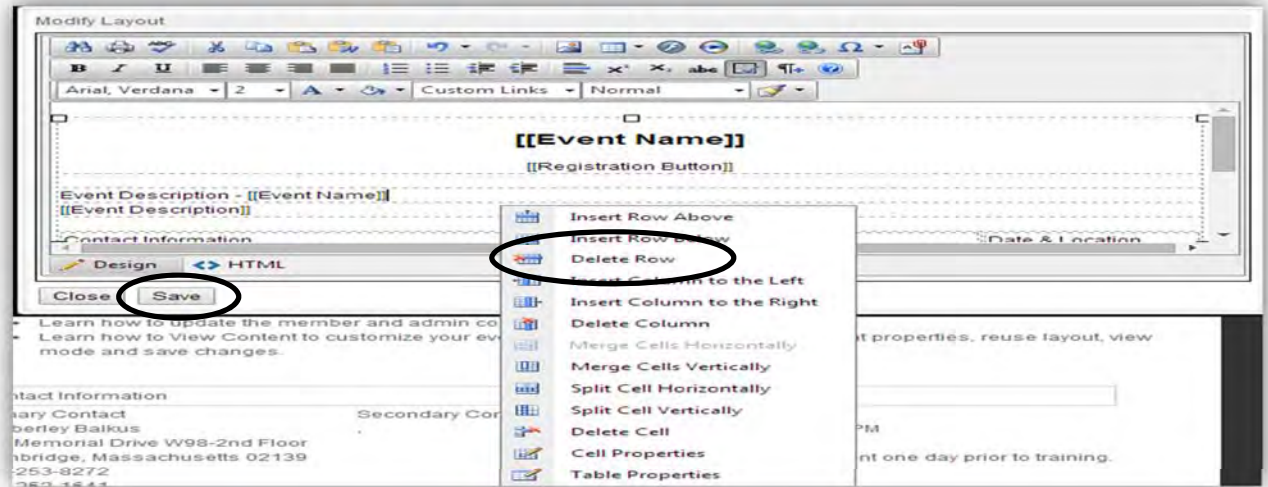
Step 5: Click **Save**.

Step 6: To remove the **Secondary Contact** if there's only one Event Administrator, hover over the content area until it is shaded in green.

Step 7: Click on the content area that is shaded in green and the **Modify Layout** window will appear.

Step 8: Highlight all of the Secondary Contact information and delete it.

Step 9: Click **Save**.



Step 10: To exit **Layout Edit**, click on **View Mode**.

Step 11: Click on **Save Changes**. Note: Do not try to save until you have returned to **View Mode**.

