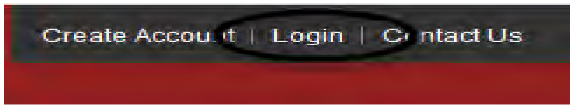
How To: Create an Event from a Template (Fee-Driven)

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.***

GETTING STARTED



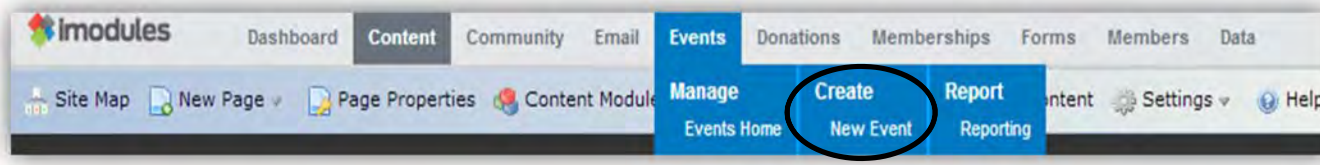
On the class, club or group's home page, go to the **LOGIN** link. Use your Infinite Connection username and password to login.

CREATE A NEW EVENT

There are two ways to create a new Event.

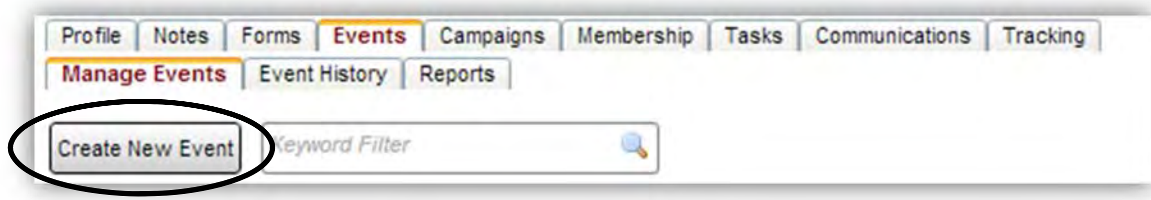
Option 1:
On the iModules Administrative Toolbar, go to the **Events** tab and select **Create New Event.**

Step 1: *(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 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**.

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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.

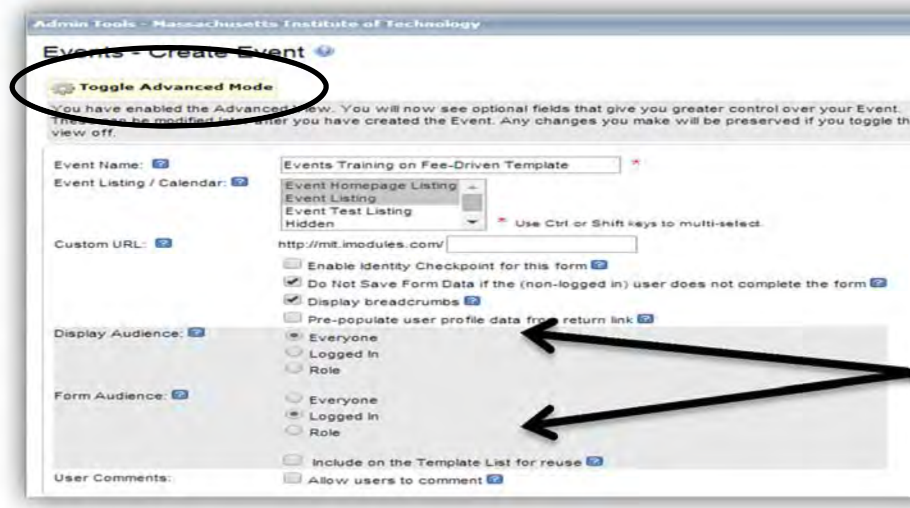
Step 8: The **Display Audience** determines access to the detail page for the event. Check **Everyone** so that everyone can see the details about the event.

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.

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.



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.**

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:

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 ***<u>through 11:59pm</u>*** on the Display Range End Date selected.

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

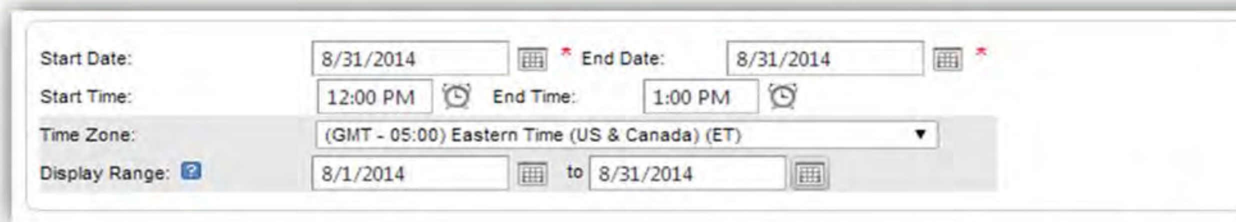
Step 16: Hover over the icon to the left of the Template – TEMPLATE: Fee-Driven Event until **Clone Template** appears and then click on the icon to clone the template.

- If the event is open to **<u>alumni ONLY</u>, 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 **<u>public</u>, ALWAYS enable Identity Checkpoint.** When this is selected the Display Audience and Form Audience will default accordingly.
- If the event is open to both **<u>alumni and the public</u>, ALWAYS enable Identity Checkpoint. <u>STRONGLY</u> 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 <u>WILL NOT</u> 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.

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



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

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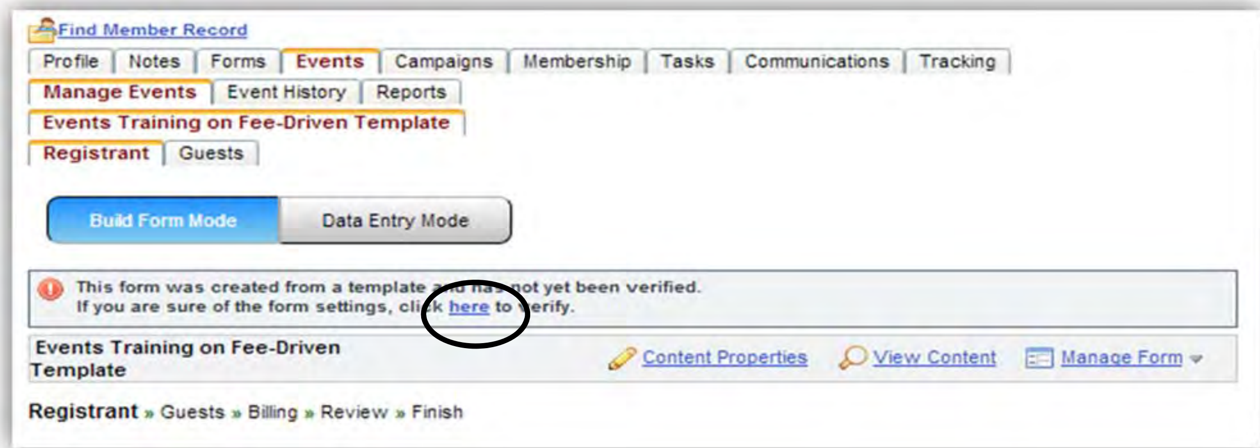
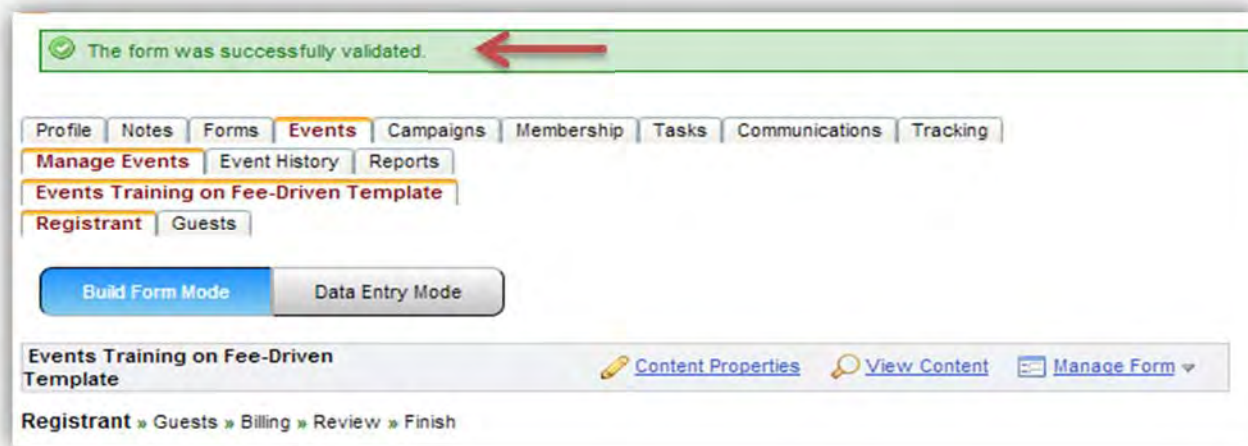
Step 17: Click on the word here where it reads, "click here to verify." This will activate the template.

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.



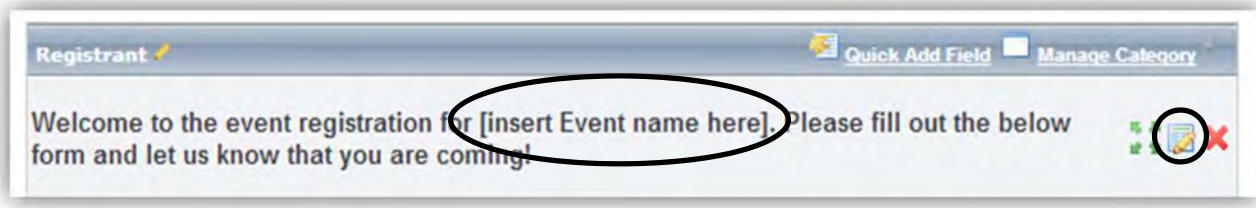
Once you have clicked on the link, you will receive the green confirmation message below.



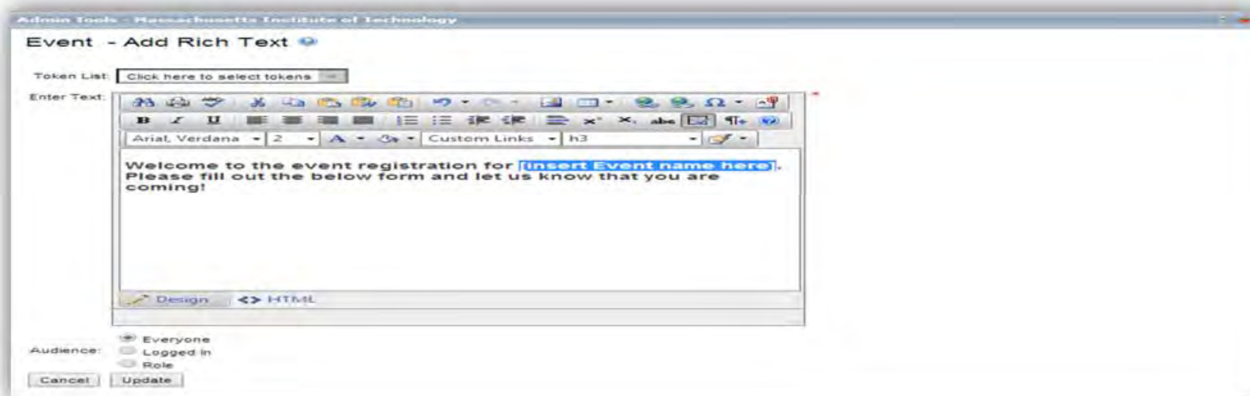
UPDATE: REGISTRANT INFORMATION

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.

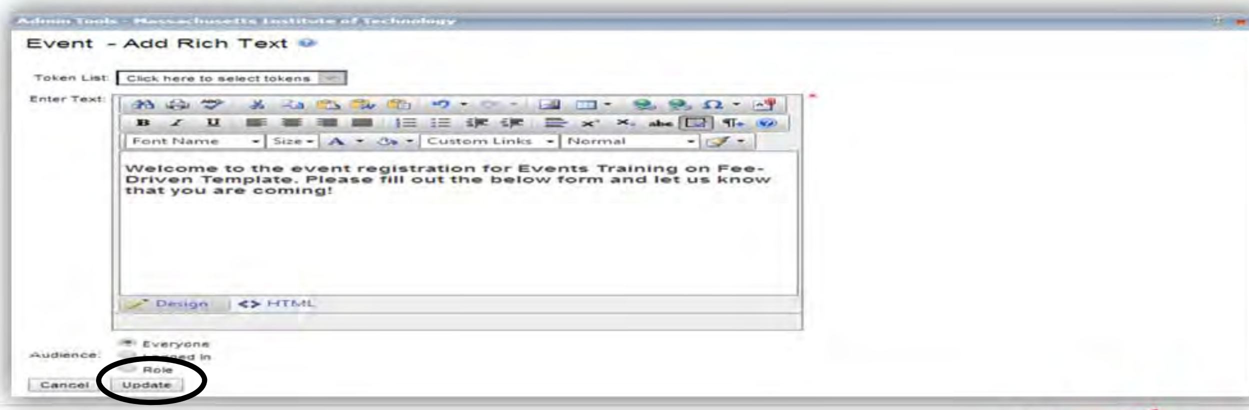


Step 19: Remove the [insert Event name here] text by highlighting the text and pressing the **Delete** key.



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.

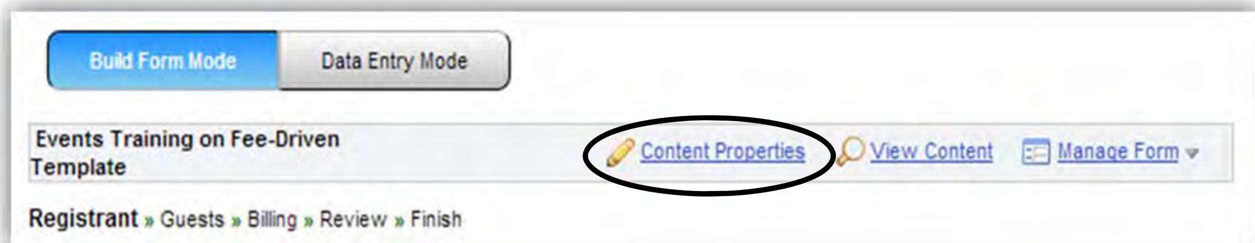
Step 25: Click on **Enable Registration Limit across all registrants, if applicable**.

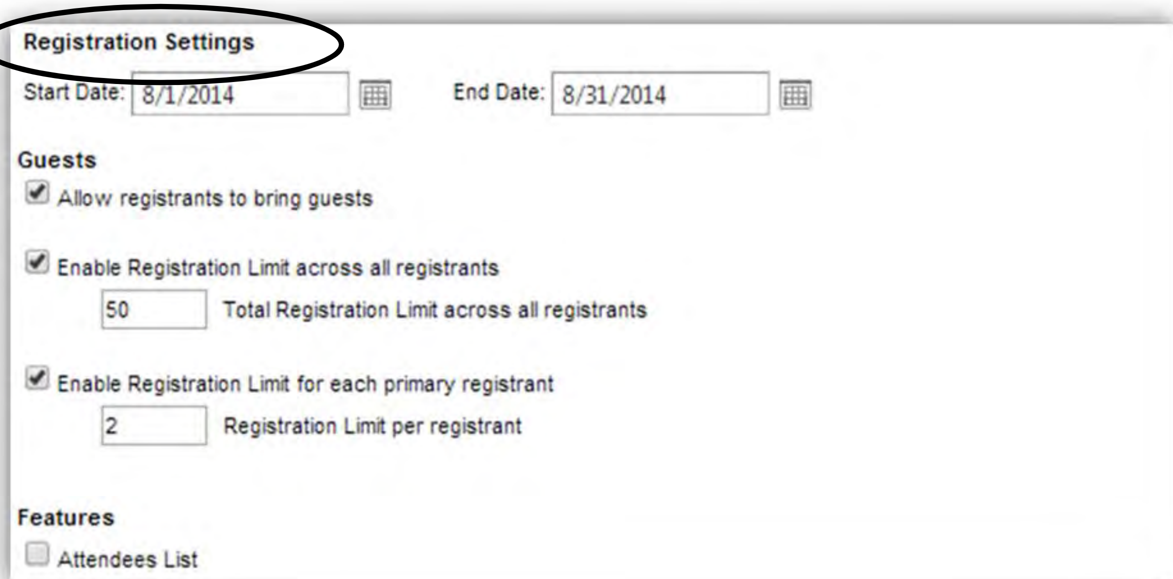
Step 26: Enter **Total Registration Limit across all registrants** *(which INCLUDES guests)*.

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**.

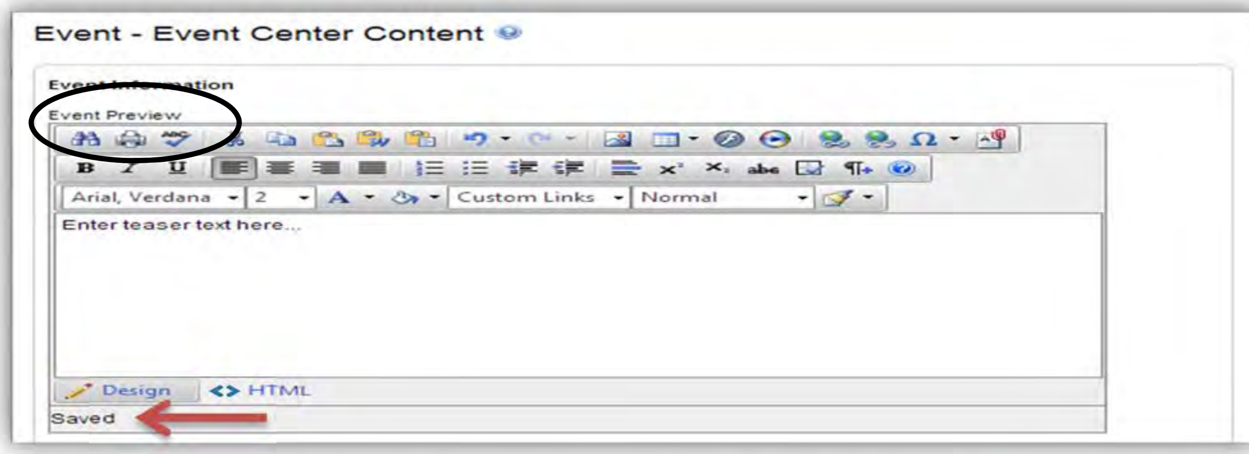


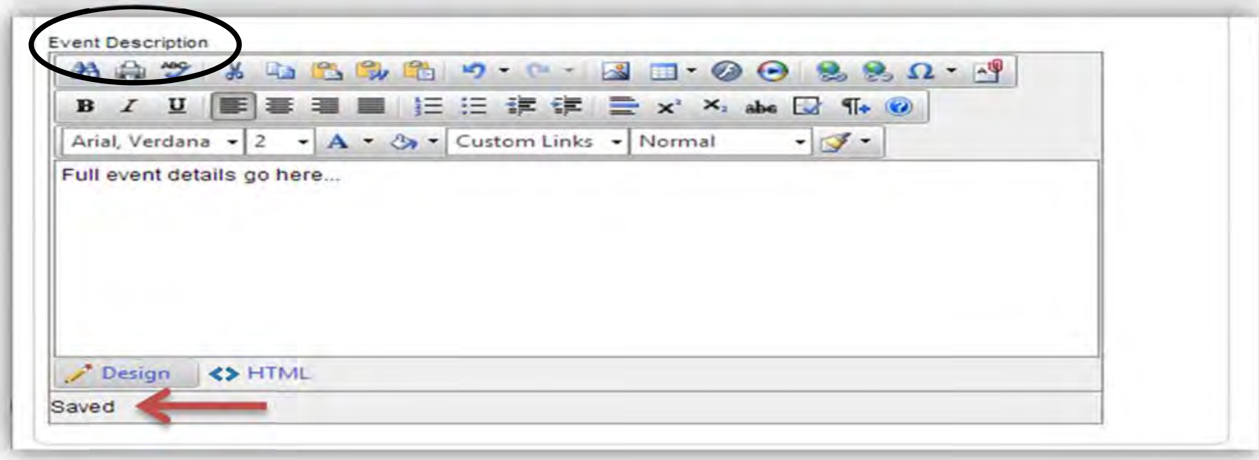


Once you save the changes, the **Event Center Content** page will appear. This page will allow you to enter the Event Preview, Event Description, Event Planner Contact Information, Location and Directions.

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.

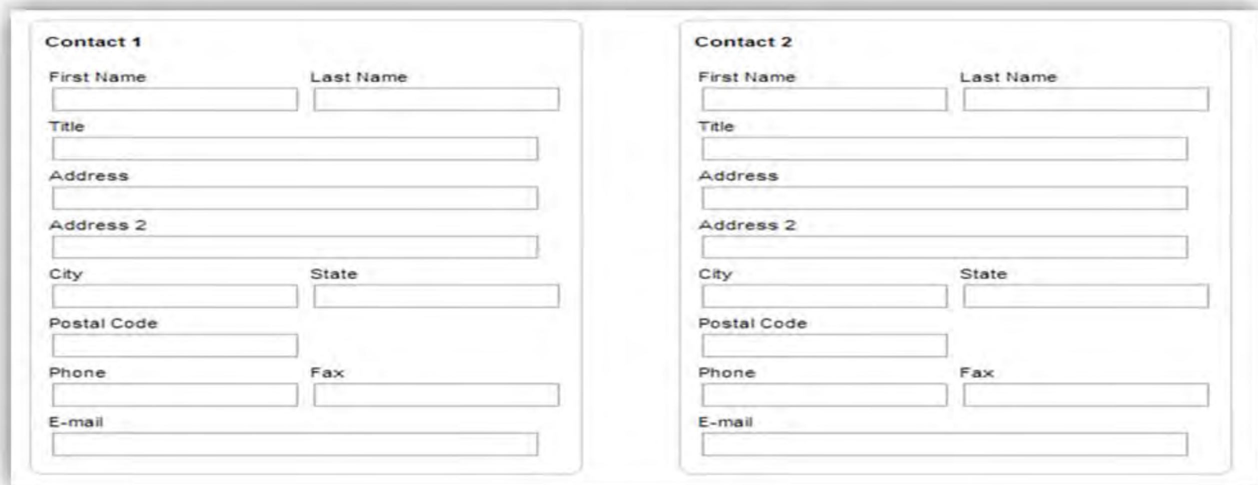
Step 32: **Contact(s):** Enter the Event Contact(s)/ Coordinator(s) contact information.

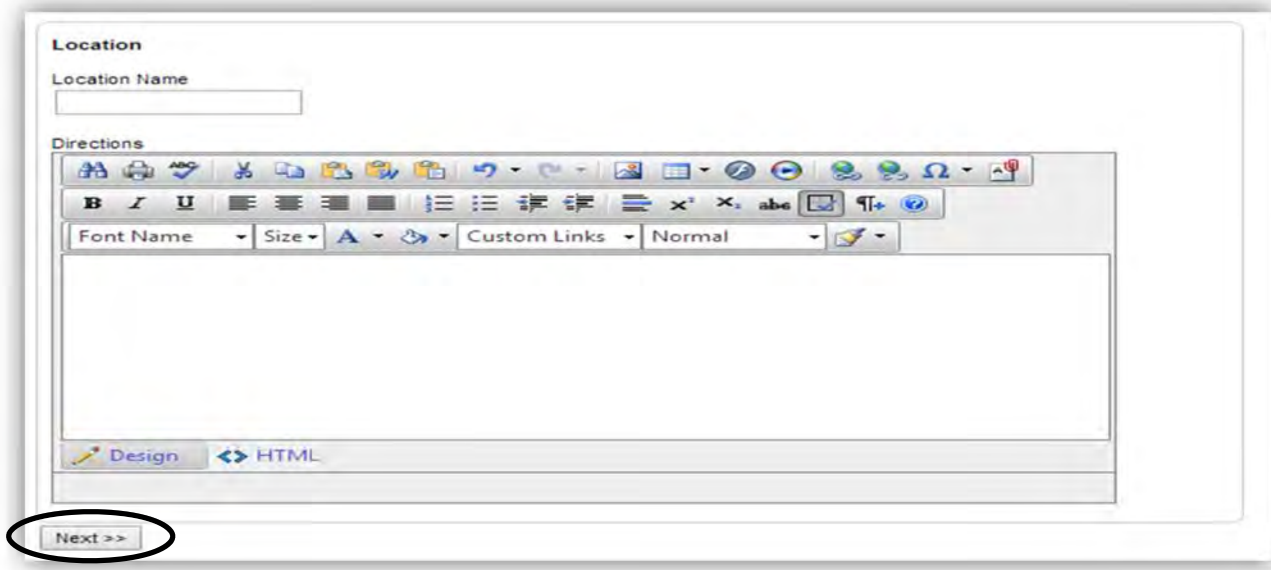
Step 33: **Location:** Enter the Location Name where the Event is being held. Use the content editor to add directions and/or links to map websites to help inform Event attendees of its location.

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.





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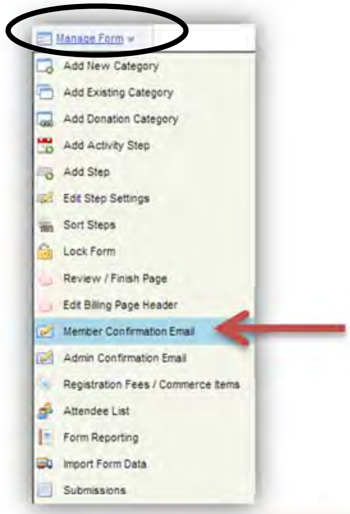
UPDATE: MEMBER CONFIRMATION EMAIL *(from name, from e-mail, confirmation subject)*

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**.



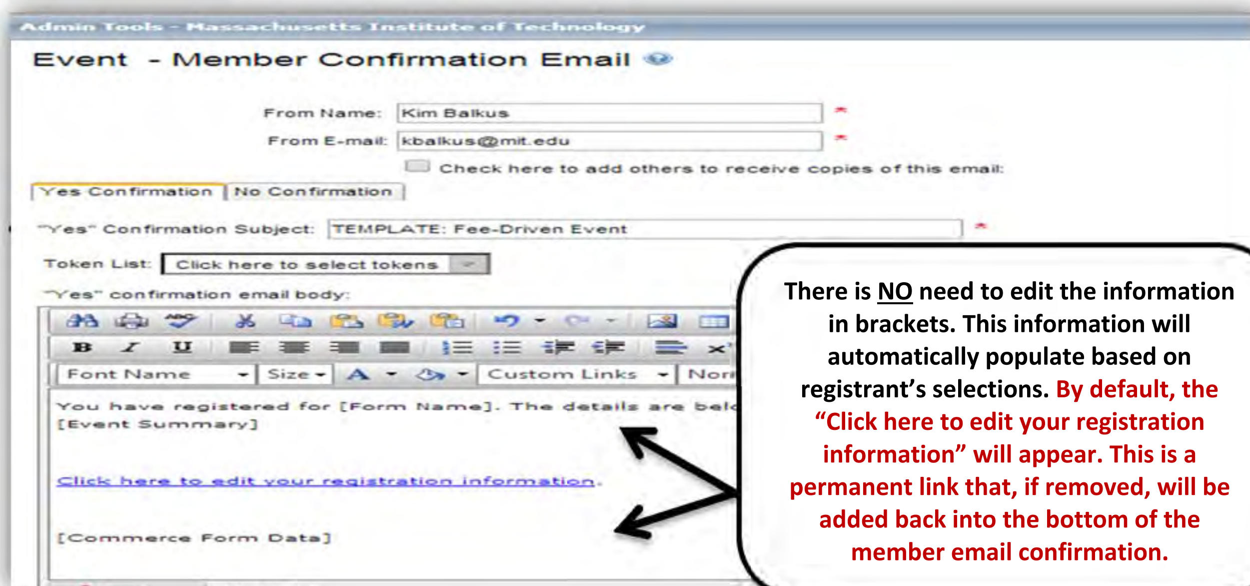
Step 36: Always review the **From Name** to update, if needed.

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.



There is NO need to edit the information in brackets. This information will automatically populate based on registrant's selections. By default, the "Click here to edit your registration information" will appear. This is a permanent link that, if removed, will be added back into the bottom of the member email confirmation.

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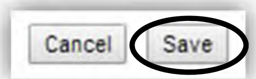
BEST PRACTICE: In the From Name field, **ALWAYS** use the club, class or group's name.

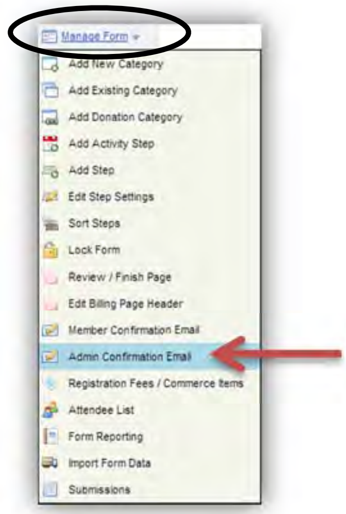
Step 41: Click **Save**.



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.

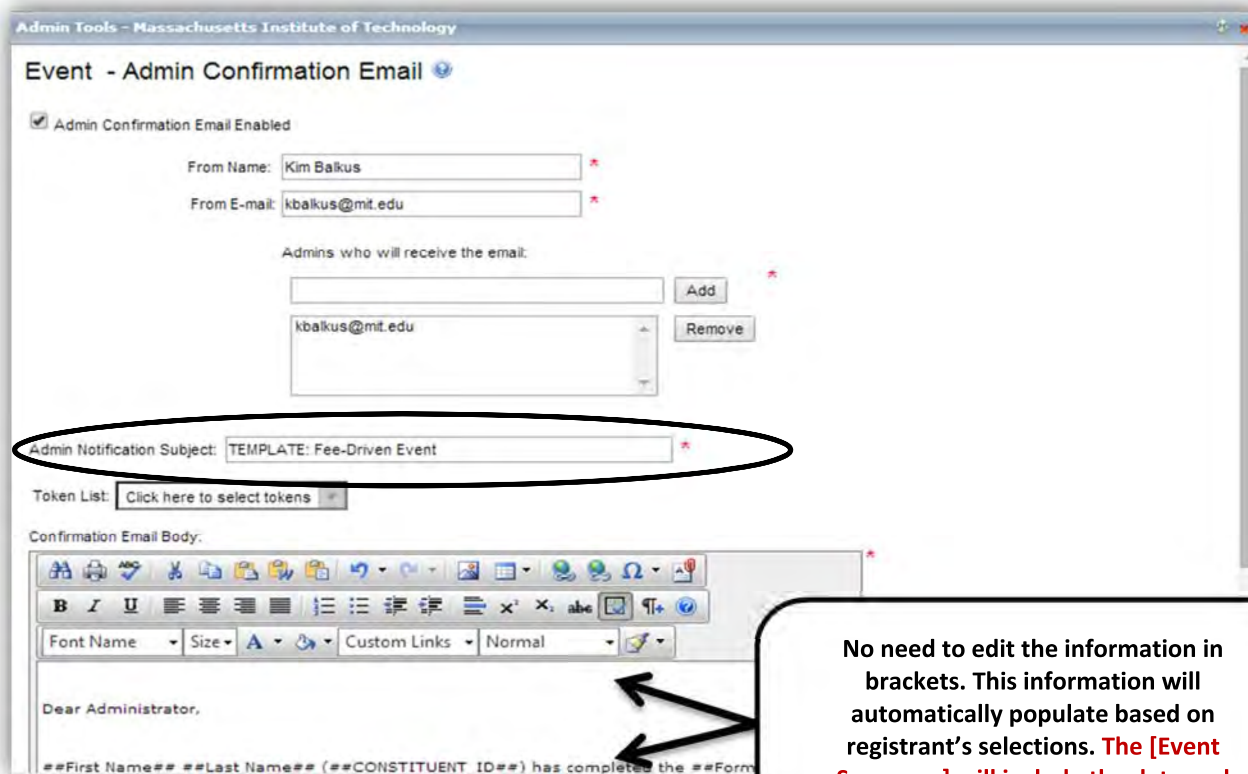
Step 44: Always review the **From E-mail** to update, if needed.

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**.

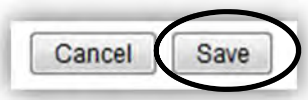
Step 46: In the **Admin Notification Subject** box, replace **TEMPLATE: Fee-Driven Event** with the actual name of the event.

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**.



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.



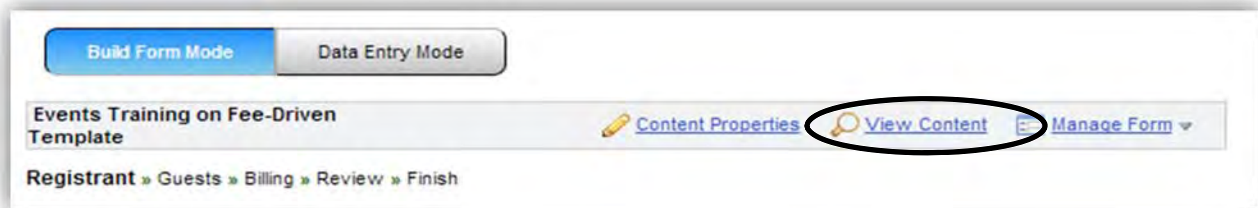
BEST PRACTICE:

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.

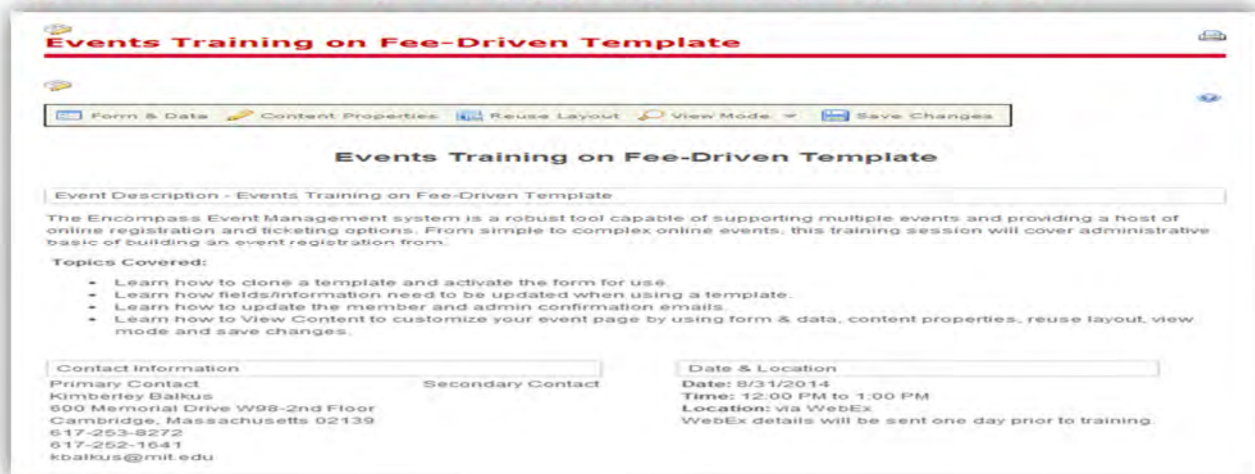
Step 49: Click **View Content** to review the Event page which will include all registration details.

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.



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.

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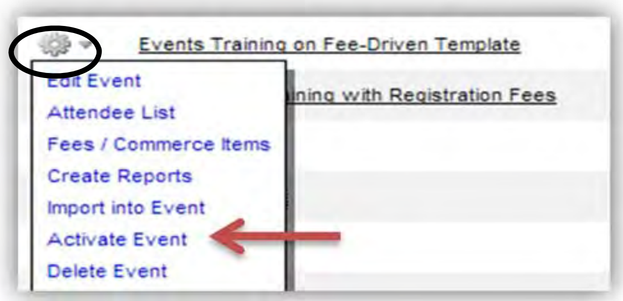
ACTIVATE/DE-ACTIVATE EVENT

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:

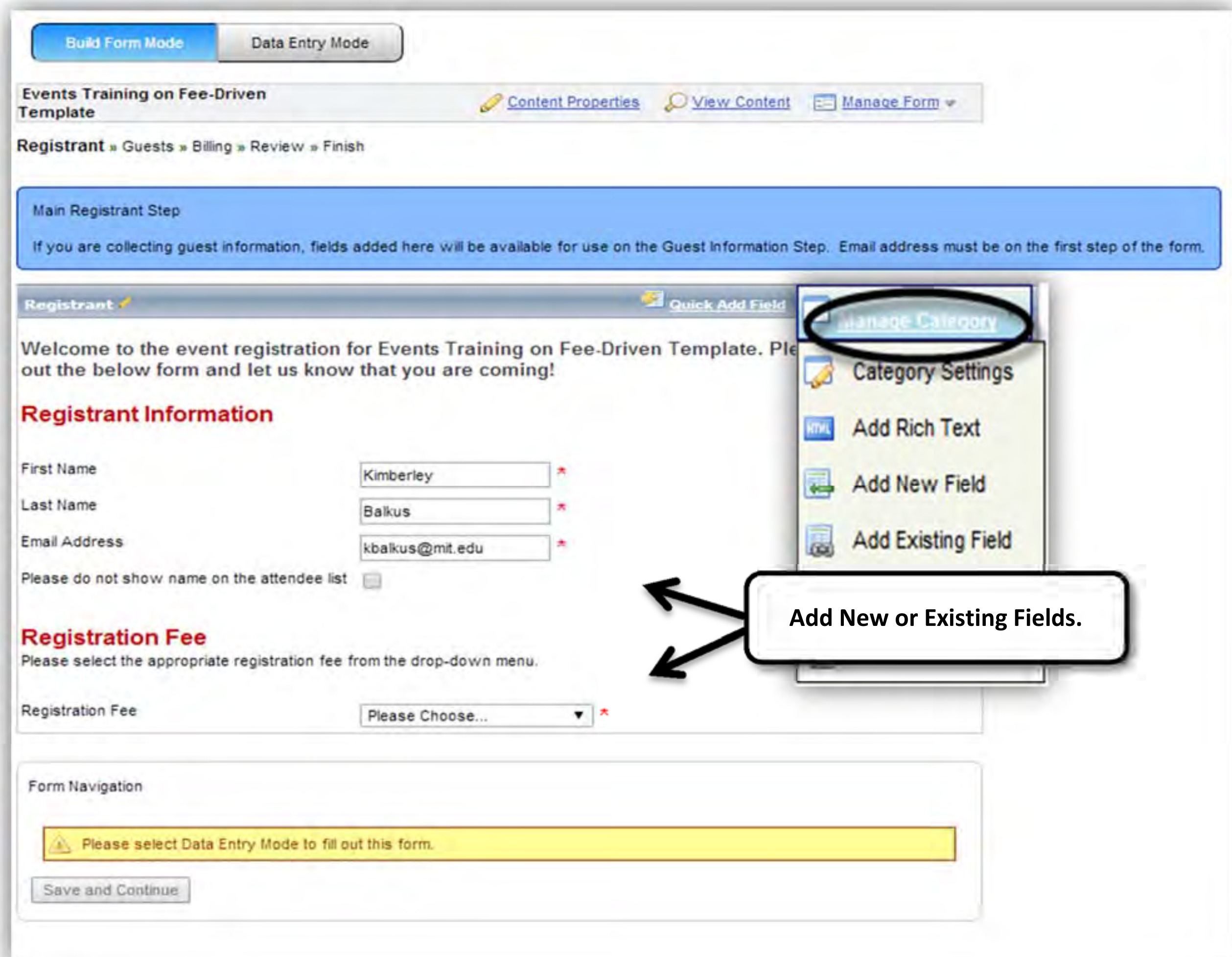
APPENDIX A: Registration Form: Add New Field or Add Existing Field (Page 14)
APPENDIX B: Registration Fees: Add Edit and Delete (Page 17)
APPENDIX C: Using Tokens in the Admin Confirmation Email (Page 28)
APPENDIX D: Review, Edit and Format Event Page (Page 29)

APPENDIX A

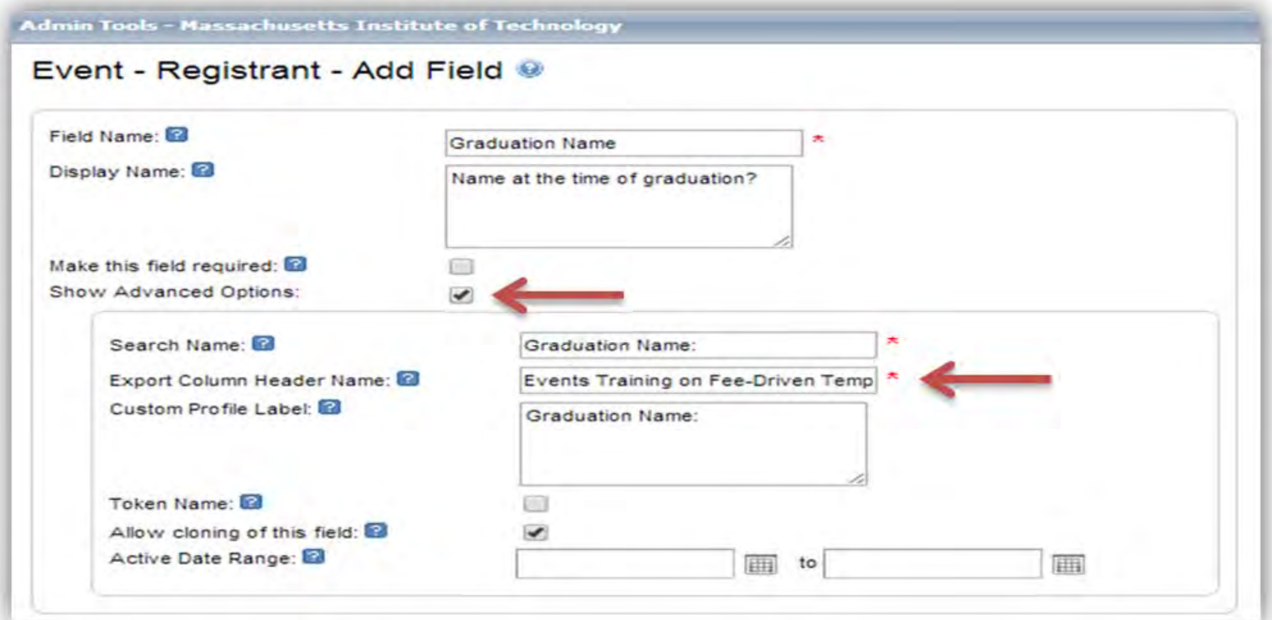
REGISTRATION FORM: ADD NEW FIELD OR ADD EXISTING FIELDS *(if needed)*

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**.

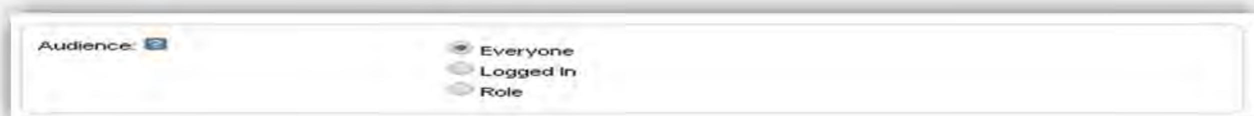


Add New Field
Step 1: Select **Add New Field** under **Manage Category.**
Step 2: Enter **Field Name**. This is the name visible to Admins when searching the database. It will default to being the Display Name as well if a different Display Name is not entered.
Step 3: Enter **Display Name.** The Display Name should be a more user-friendly version of the Field Name that the registrant will see.



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.

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



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

Step 6: Click **Next**.

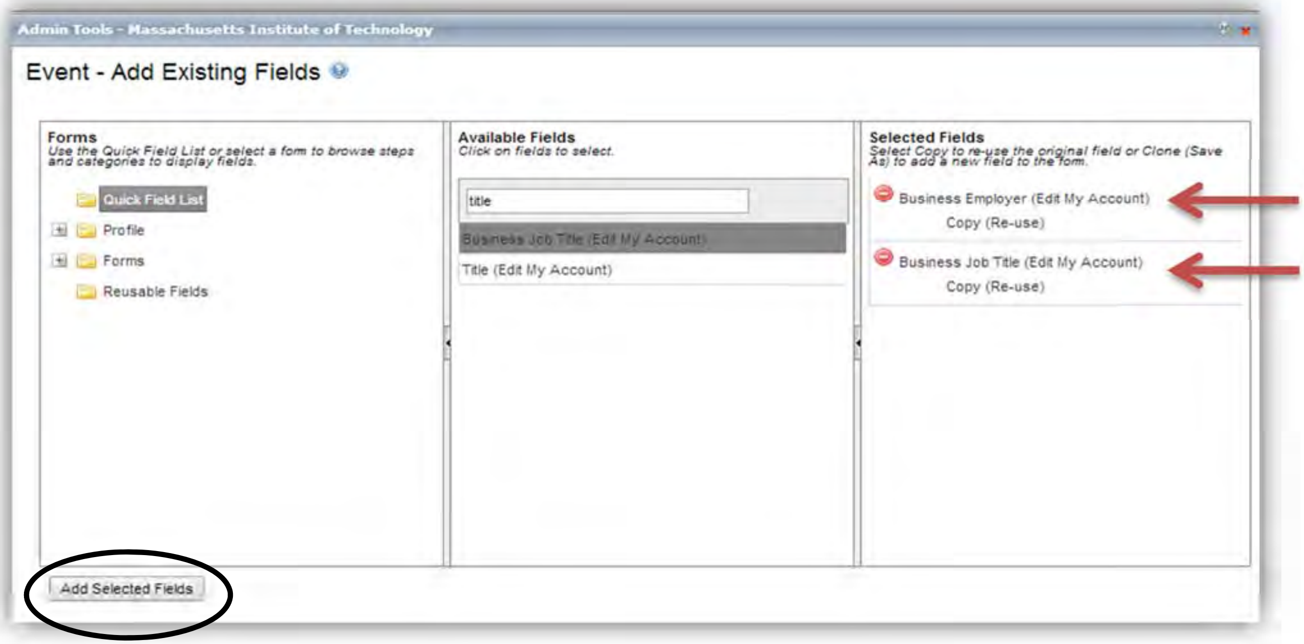
Add Existing Field

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

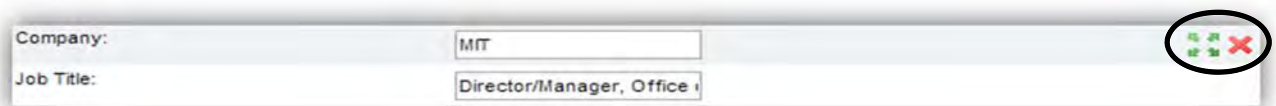
Step 2: Add Existing Fields by clicking on the **Quick Field List** and then type in search criteria for that field. For example: If you want to add the job title, type in the word, “Title” in the **Available Fields** search box to see all available fields that have the word, “Title” in the name. Then 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.

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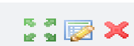
APPENDIX B

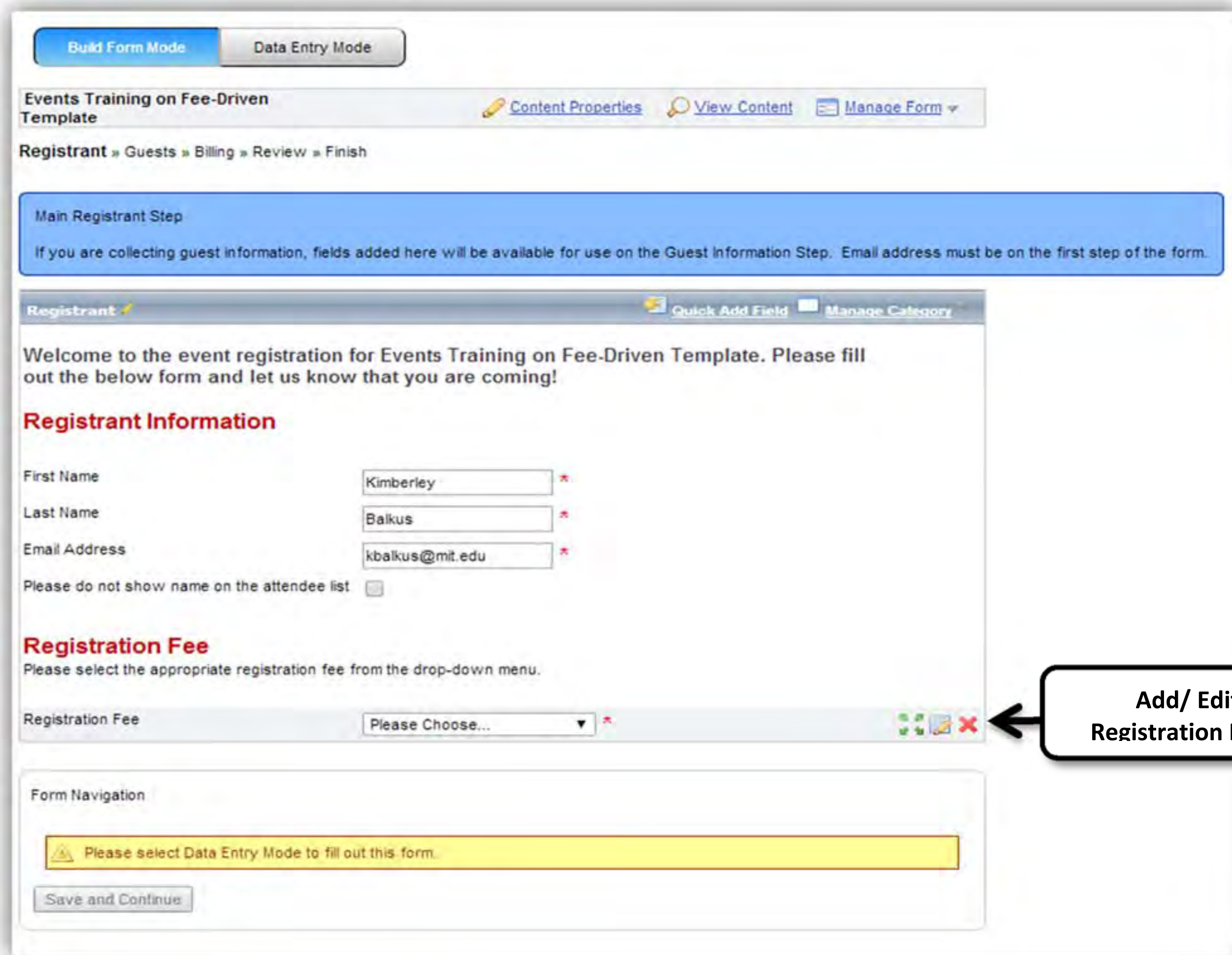
REGISTRATION FEES: ADD, EDIT, AND DELETE *(if needed)*

<u>ADD</u> Registration Fees

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

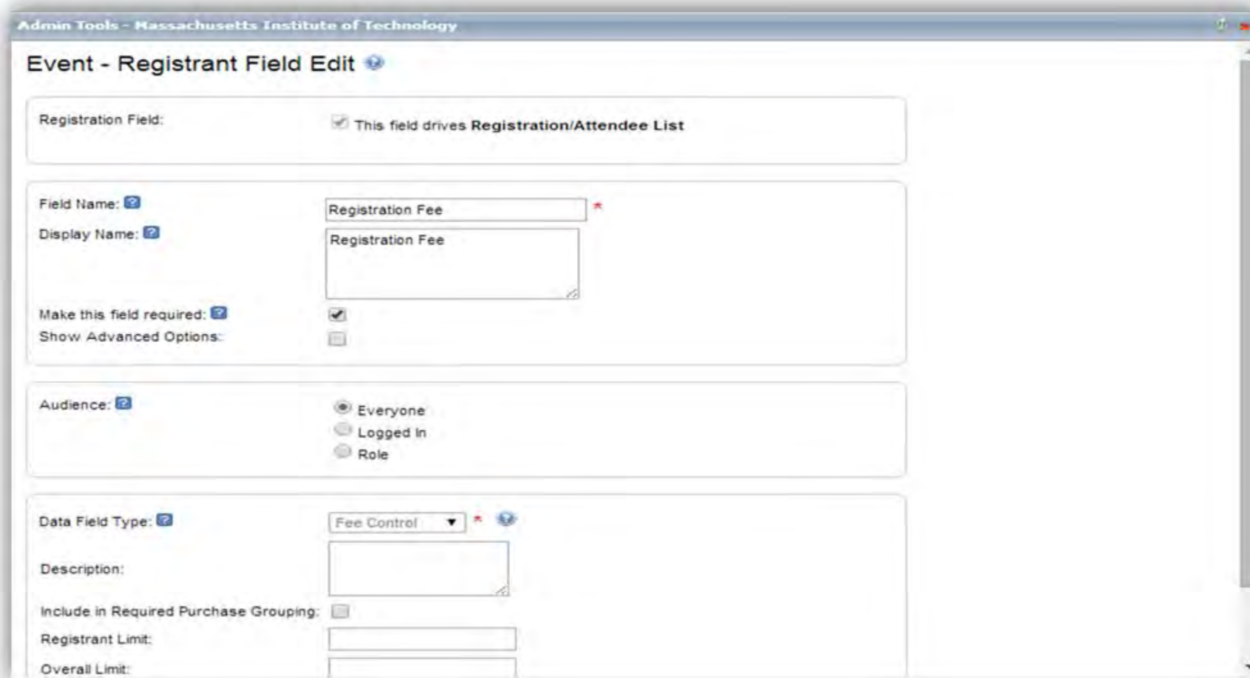
Step 2: If needed, update the specifics of each **registration fee** *(display name, price, etc.)* on your event form, by using the edit controls to the right of the field *(move field, edit field, delete field).*

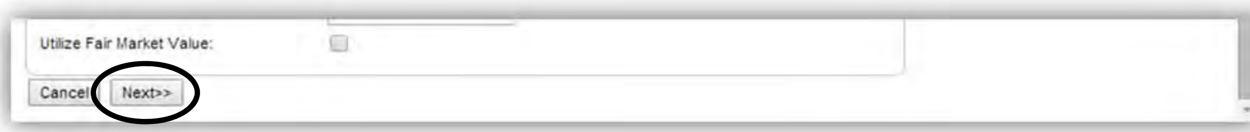




Add/ Edit Registration Fees.

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





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

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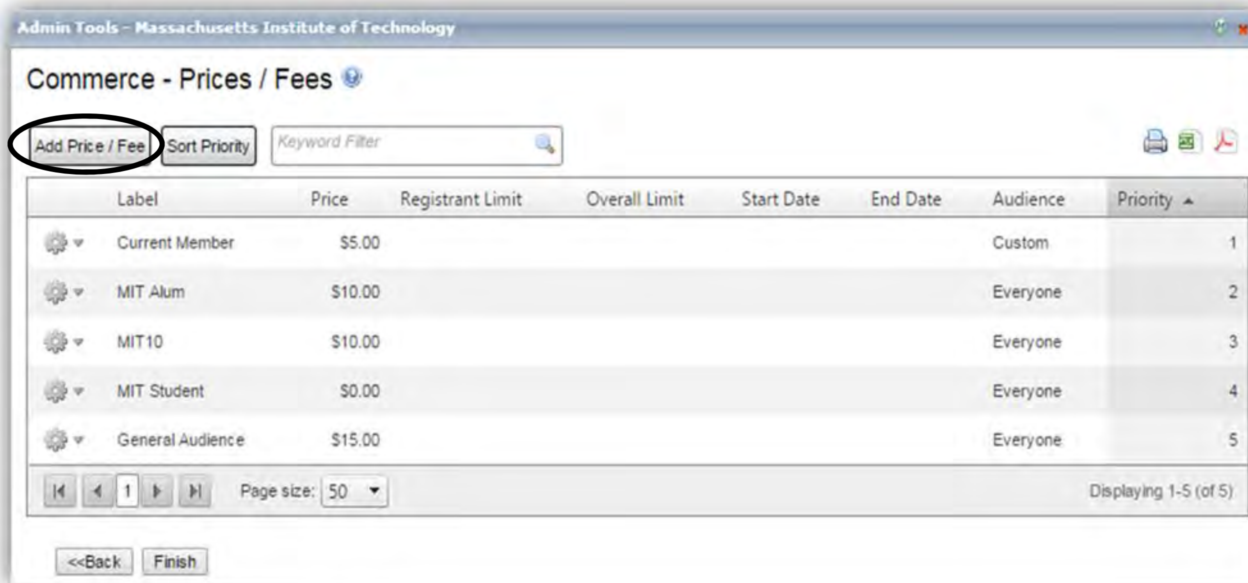
Step 4: On the Commerce – Prices/Fees page, click **Add Price/Fee.**

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.



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

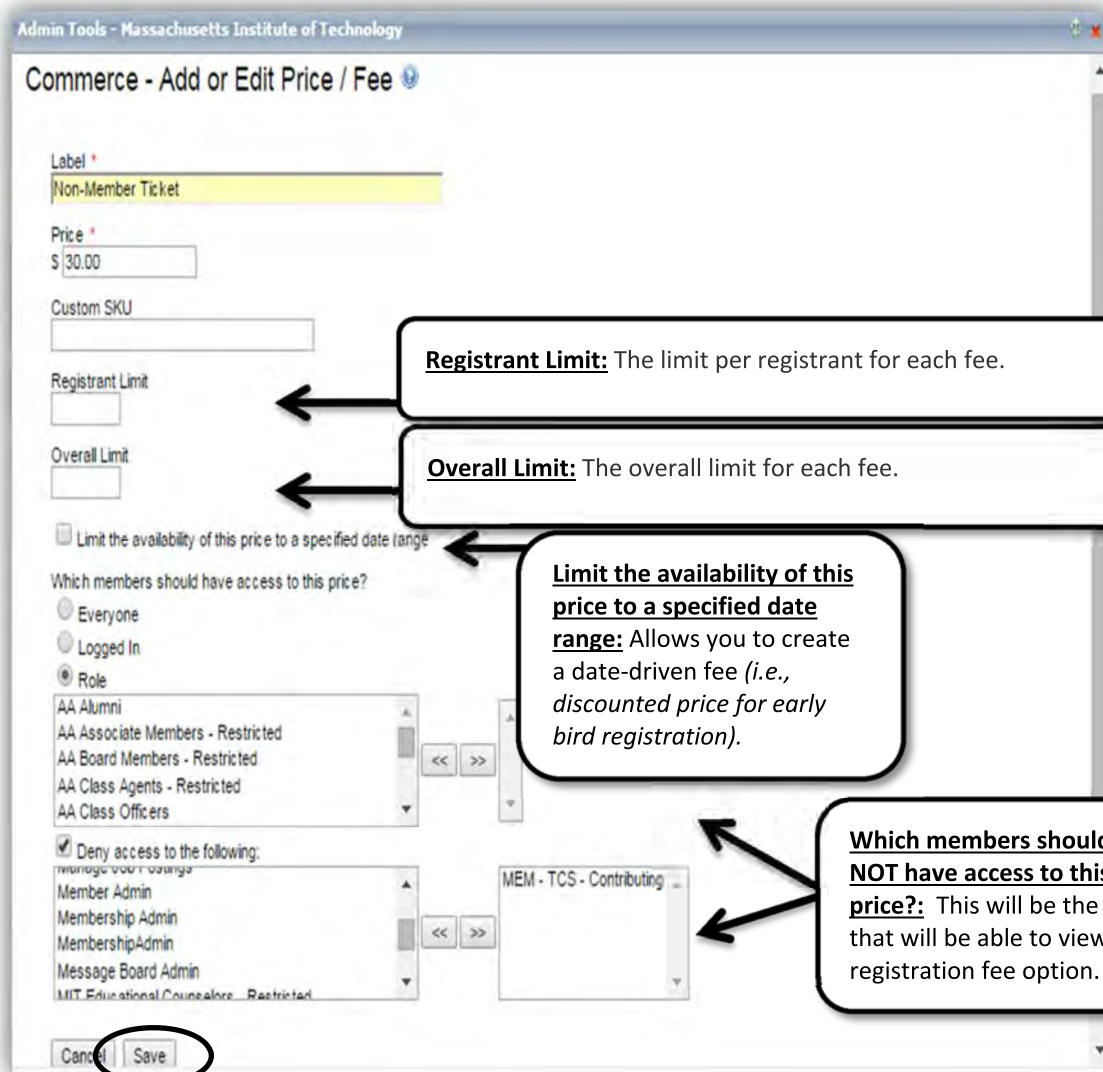
Step 6: Enter **Price**.

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**.



Registrant Limit: The limit per registrant for each fee.

Overall Limit: The overall limit for each fee.

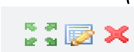
Limit the availability of this price to a specified date range: Allows you to create a date-driven fee *(i.e., discounted price for early bird registration).*

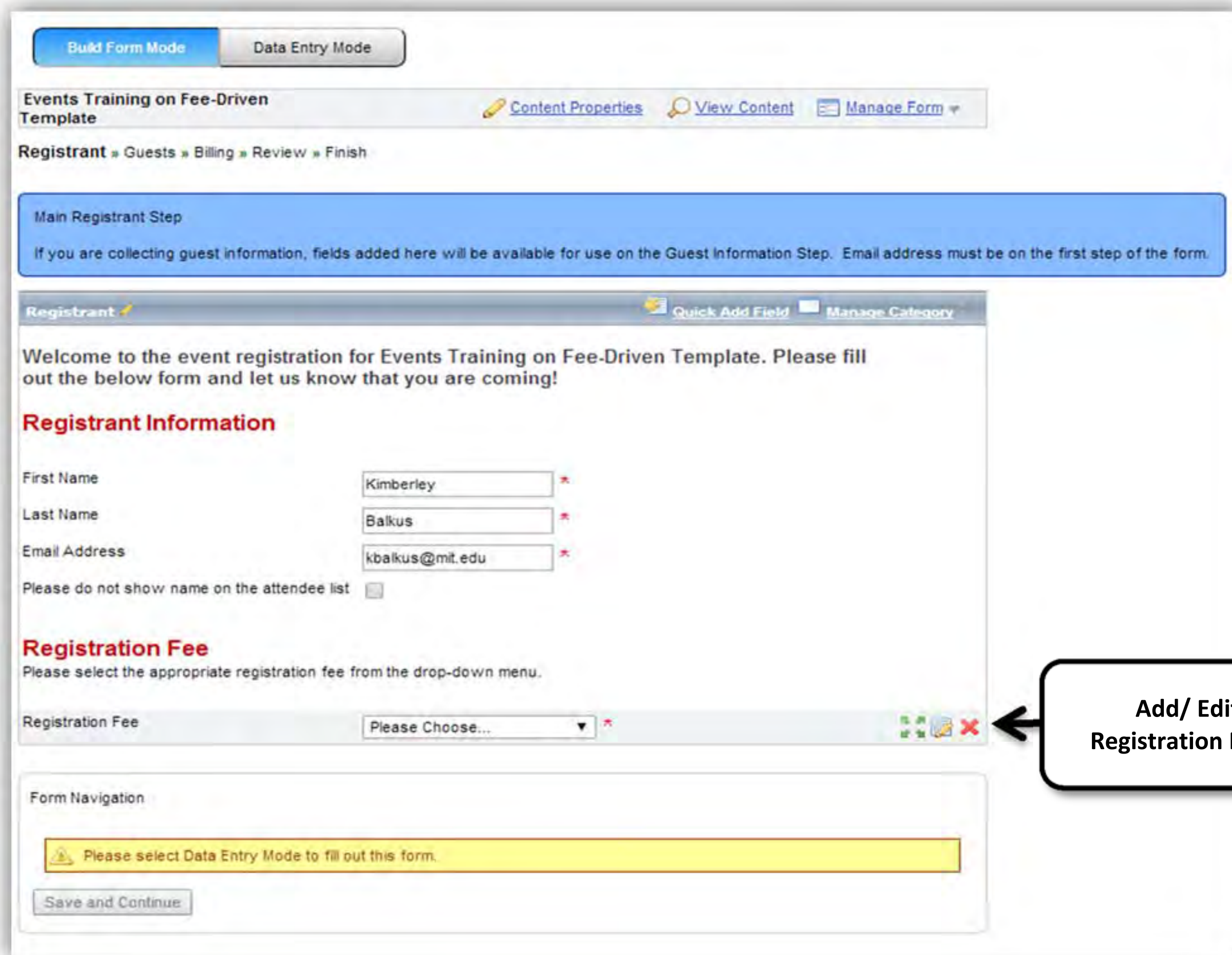
Which members should OR should NOT have access to this price?: This will be the audience that will be able to view this registration fee option.

EDIT Registration Fees

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

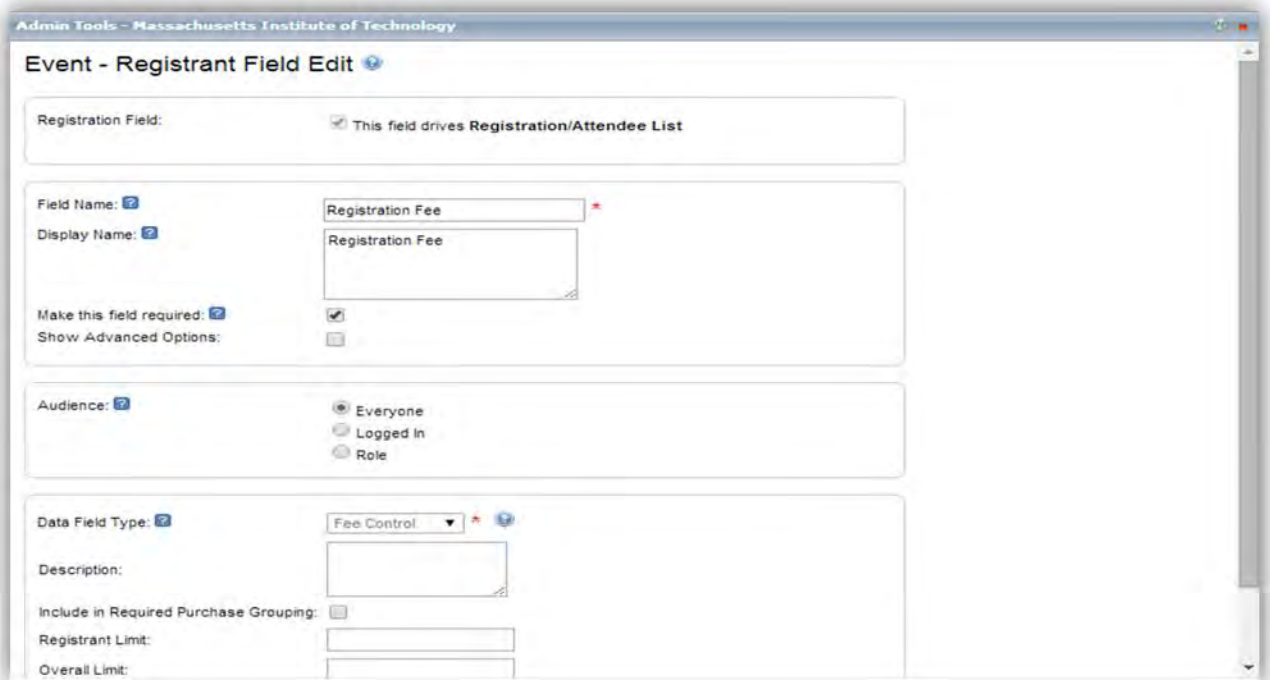
Step 2: If needed, update the specifics of each **registration fee** *(display name, price, etc.)* on your event form, by using the edit controls to the right of the field *(move field, edit field, delete field).*

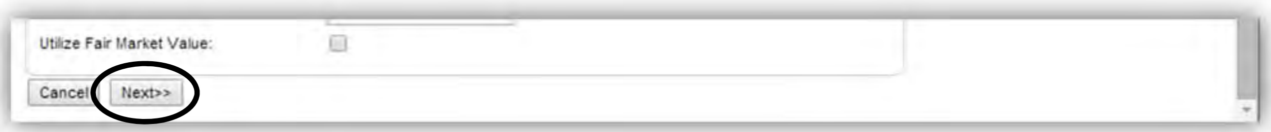




Add/ Edit Registration Fees.

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





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

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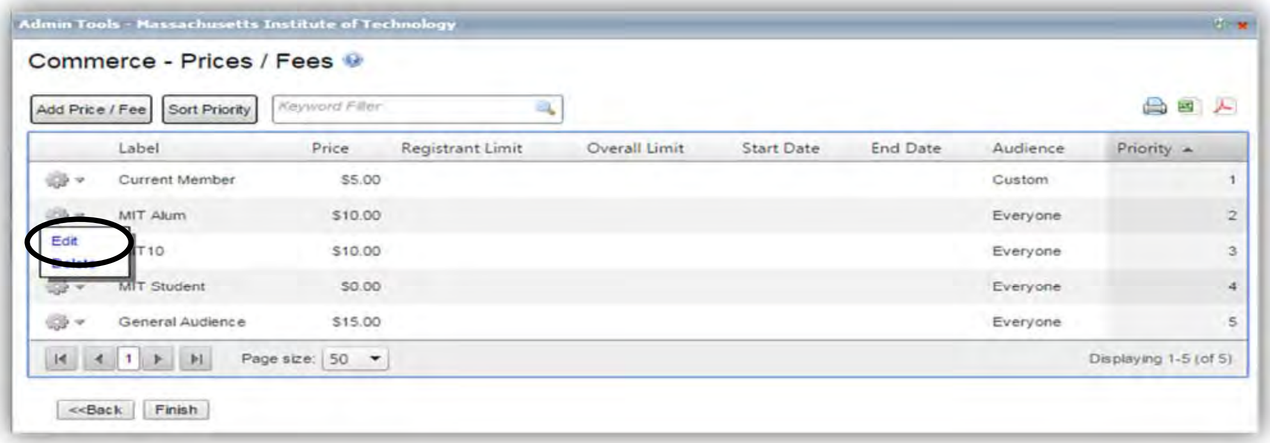
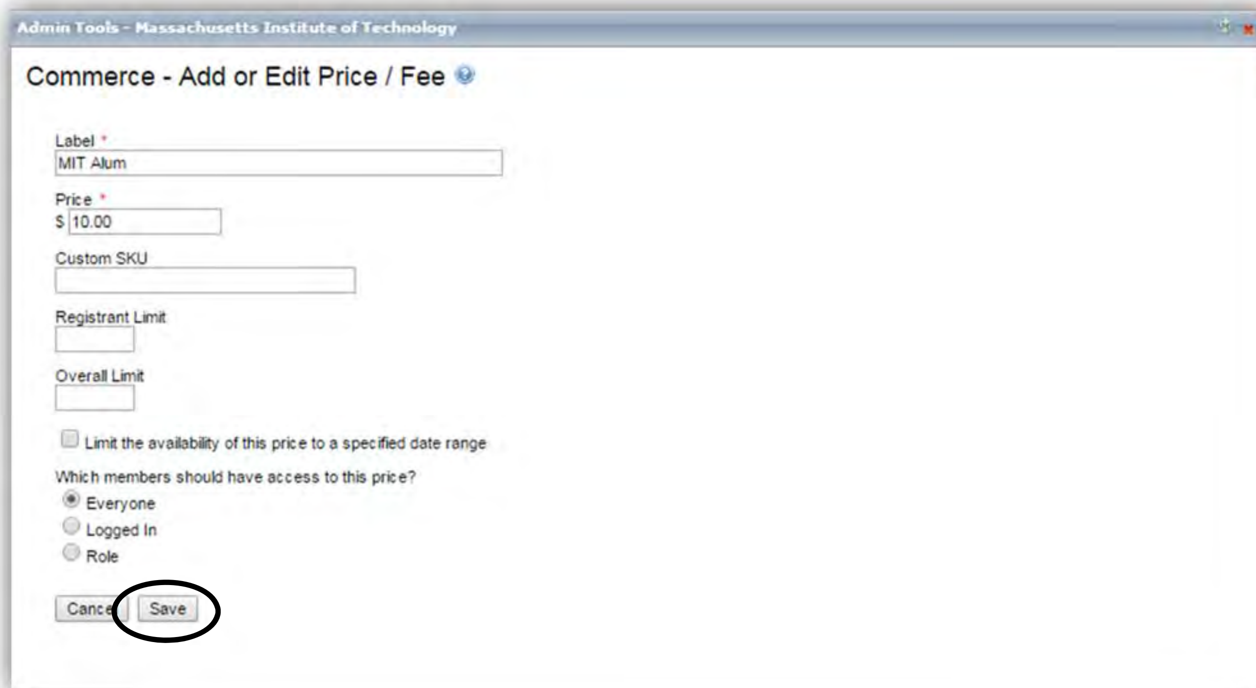
Step 4: Go to the registration fee that needs to be edited. Click on the drop-down menu to the right of the cog wheel and select **Edit**.



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.

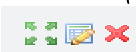


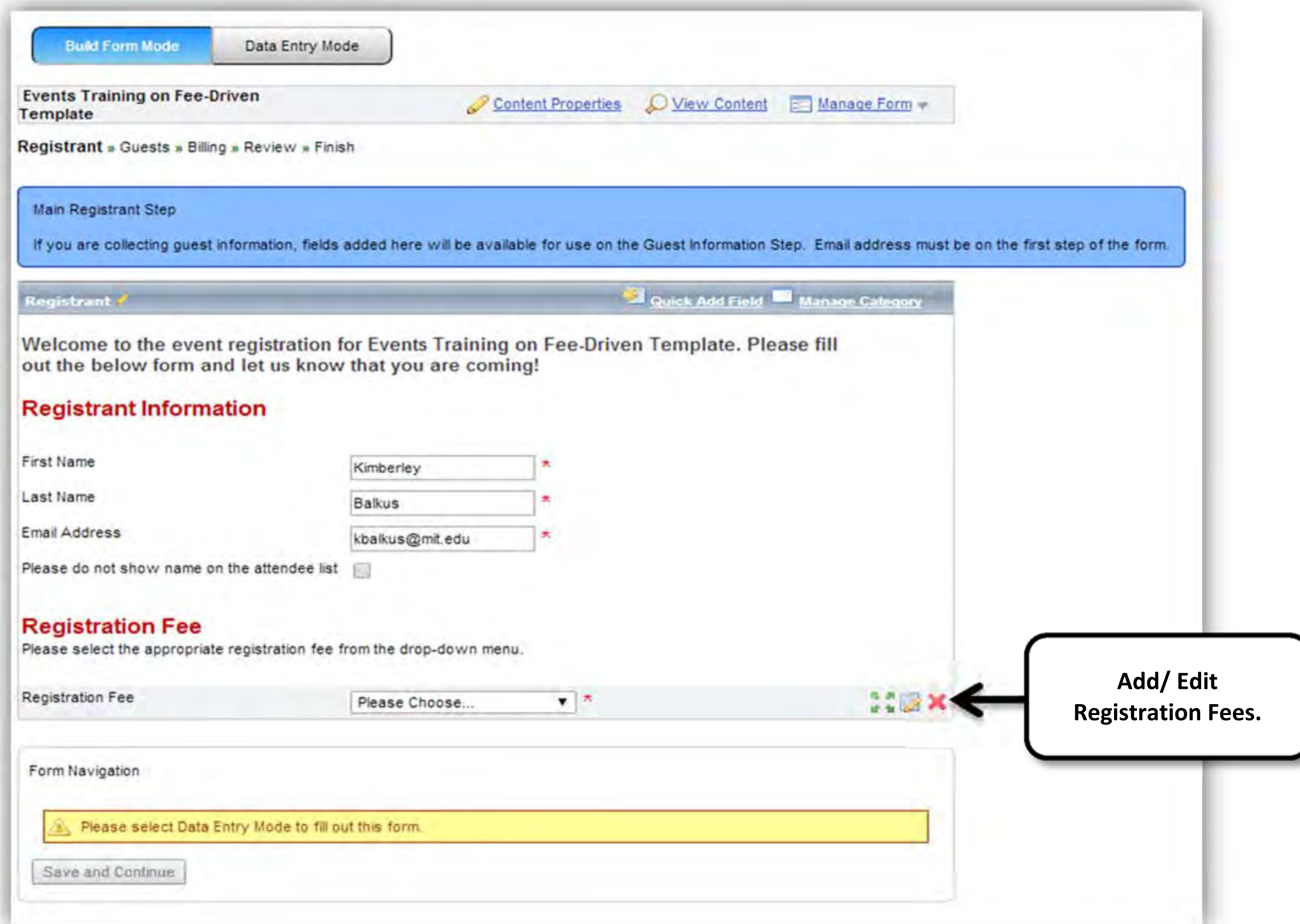
Step 6: Click **Save**.

DELETE Registration Fees

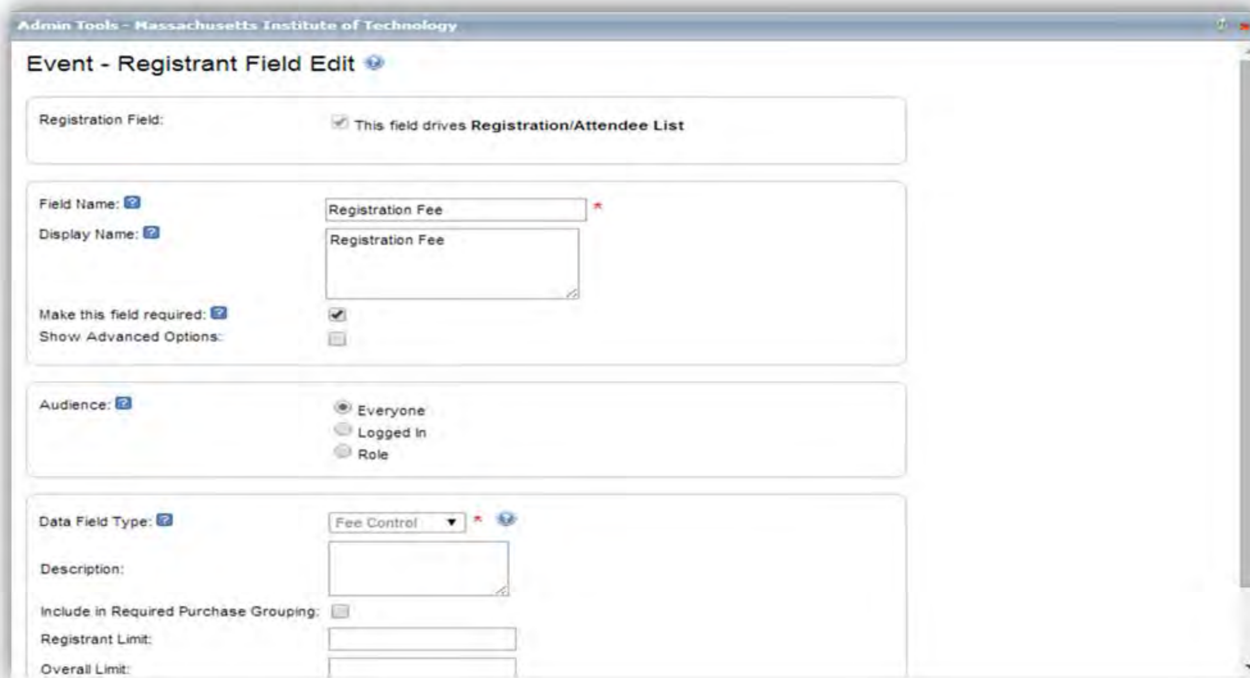
Step 1: Go to **Registration Fee** field to edit field.

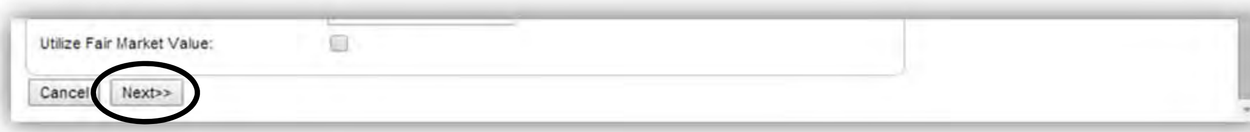
Step 2: If needed, update the specifics of each **registration fee** *(display name, price, etc.)* on your event form, by using the edit controls to the right of the field *(move field, edit field, delete field).*





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

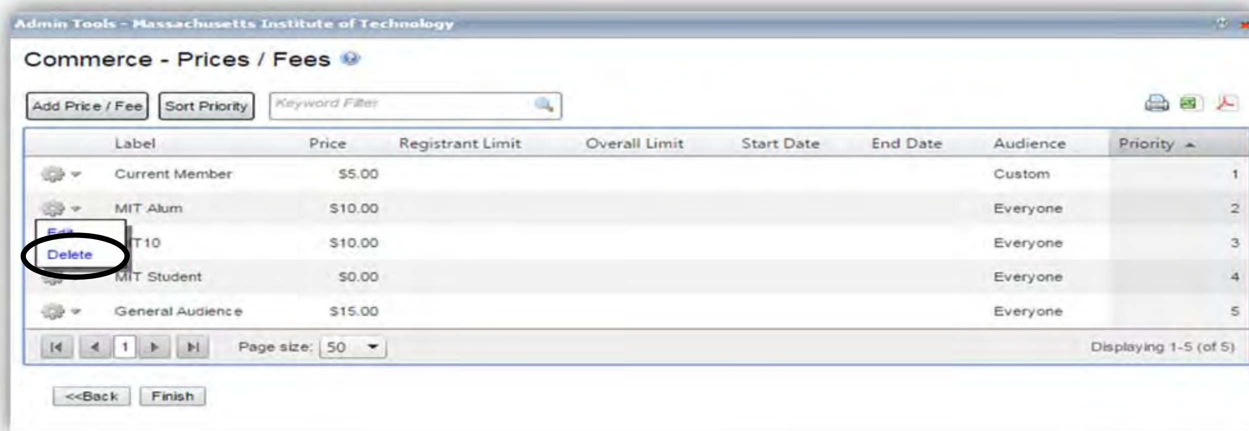


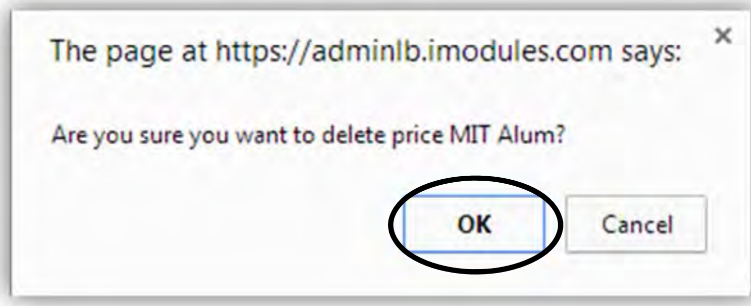


Step 3: On the Event – Registration Field Edit page, Click **Next**.

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**.

Step 5: Select **OK**.





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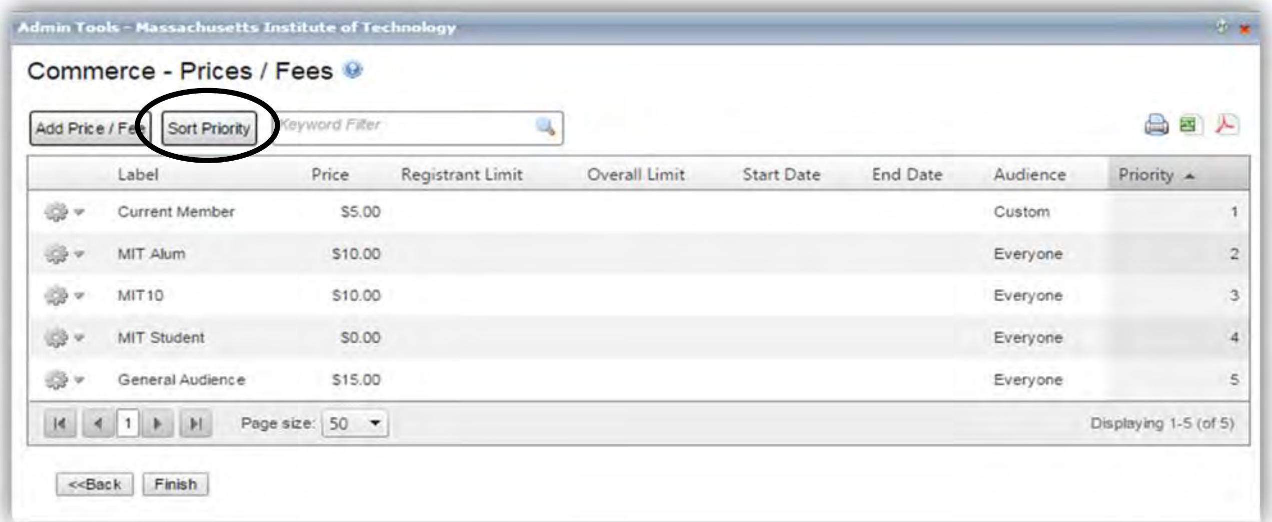
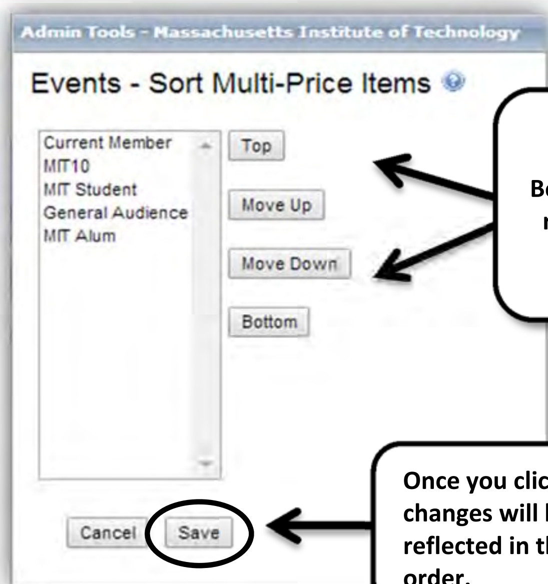
SORT Priority of Registration Fees

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.



Select Top, Move Up, Move Down and Bottom buttons to change the order of the registration fees listed in the drop-down menu.

Once you click Save, changes will be reflected in the sort order.

Step 4: Click **Save**.

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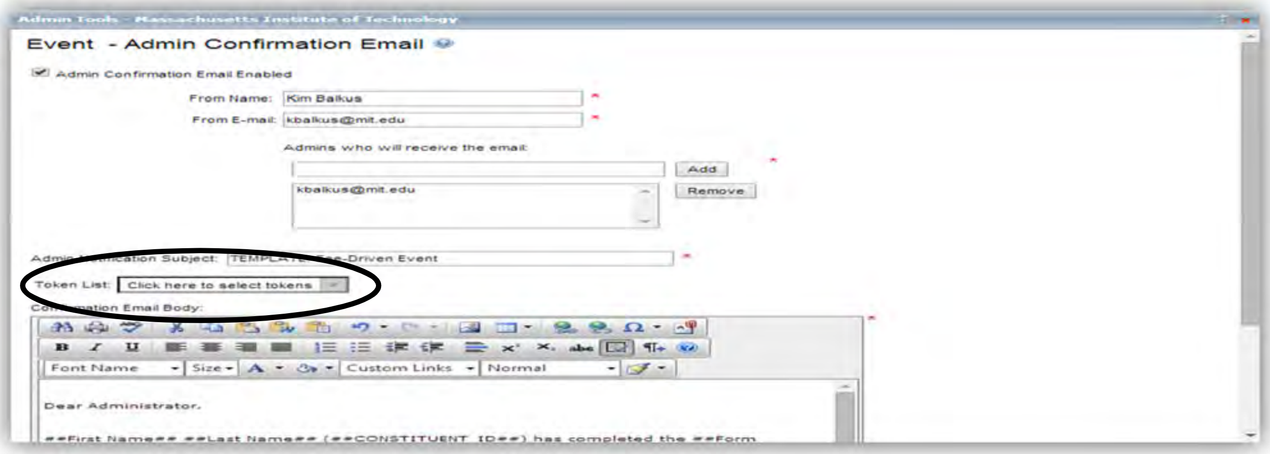
APPENDIX C

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.

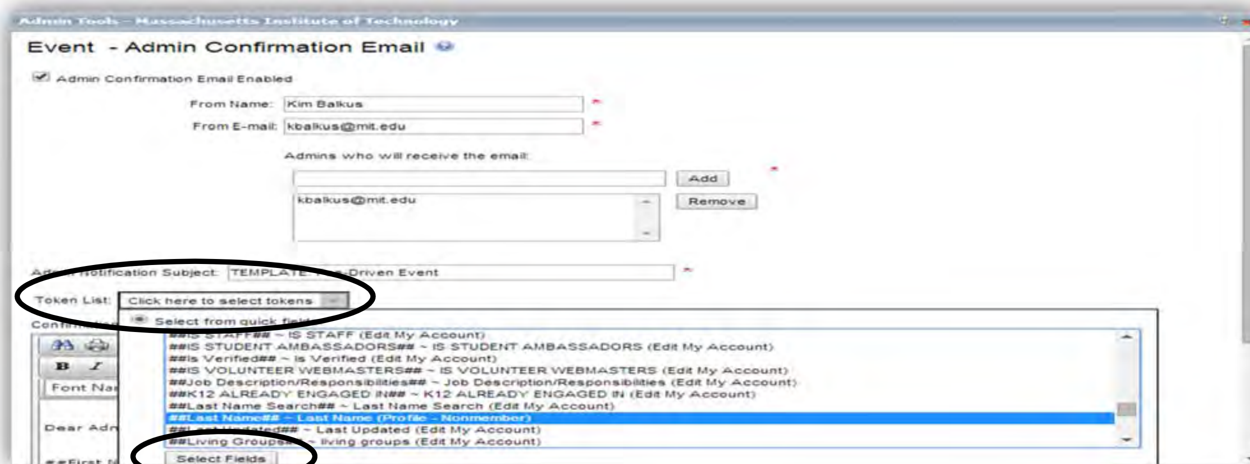
Step 2: To add a token to the **Confirmation Email Body**, click the **Token List** drop-down menu.



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.**



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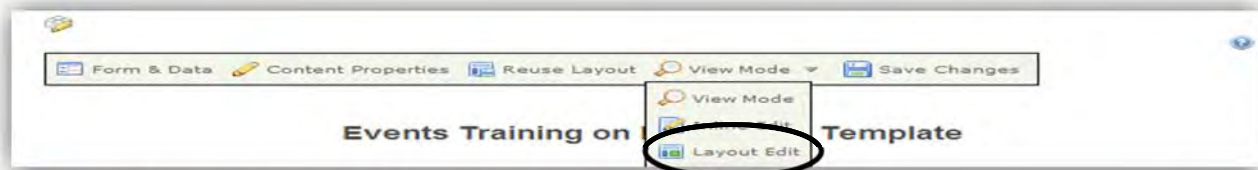
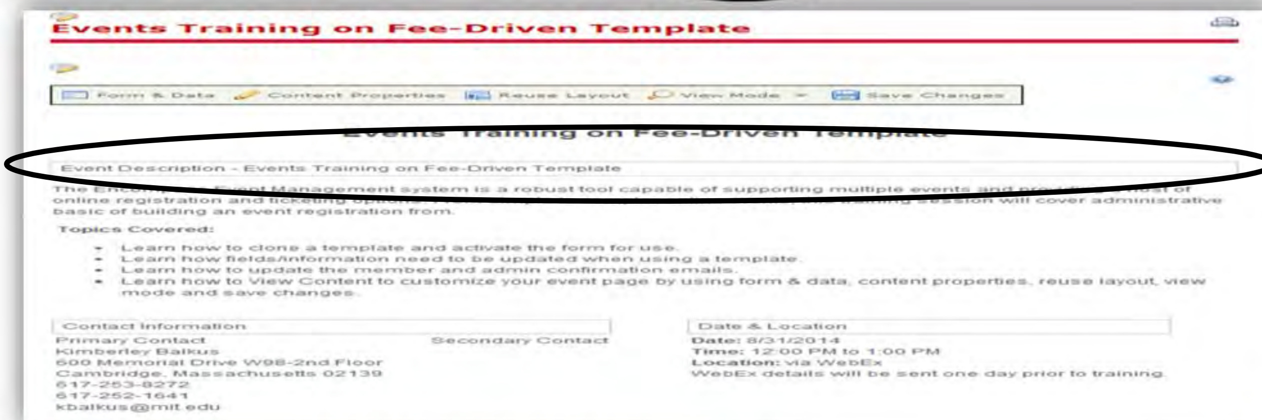
APPENDIX D

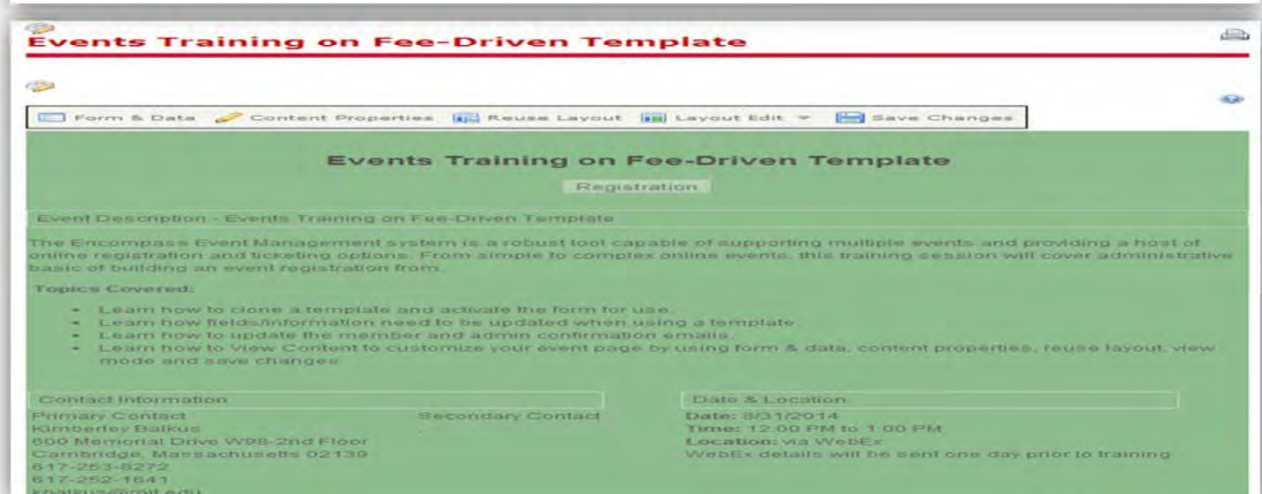
REVIEW, EDIT AND FORMAT EVENT PAGE (*if needed)*

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.



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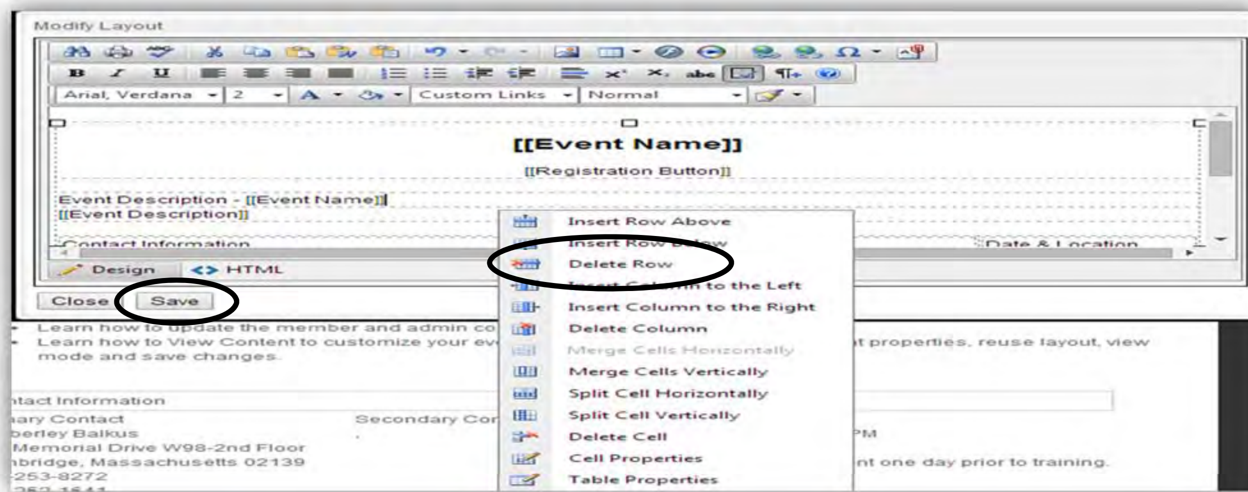
Step 3: In the **Event Description – [[Event Name]]** row, right-click to view the menu to make edits to the table.

Step 4: Select **Delete Row**.

Step 5: Click **Save**.

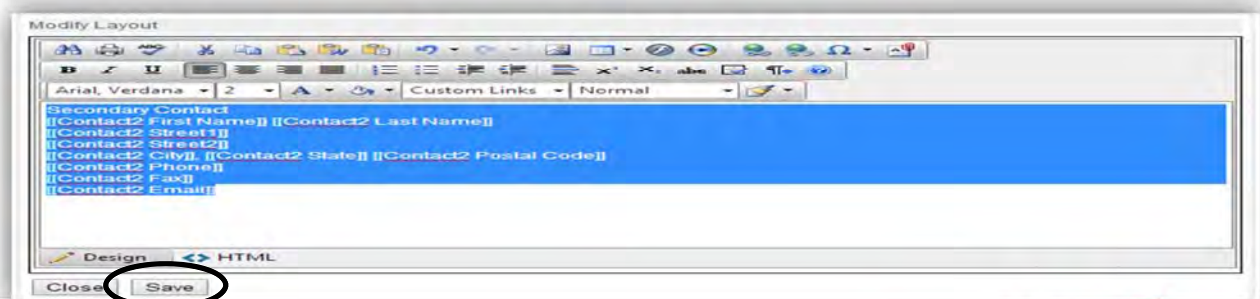


Step 6: To remove the **Secondary Contact** if there's only one Event Administrator, hover over the content area until it is shaded in green.

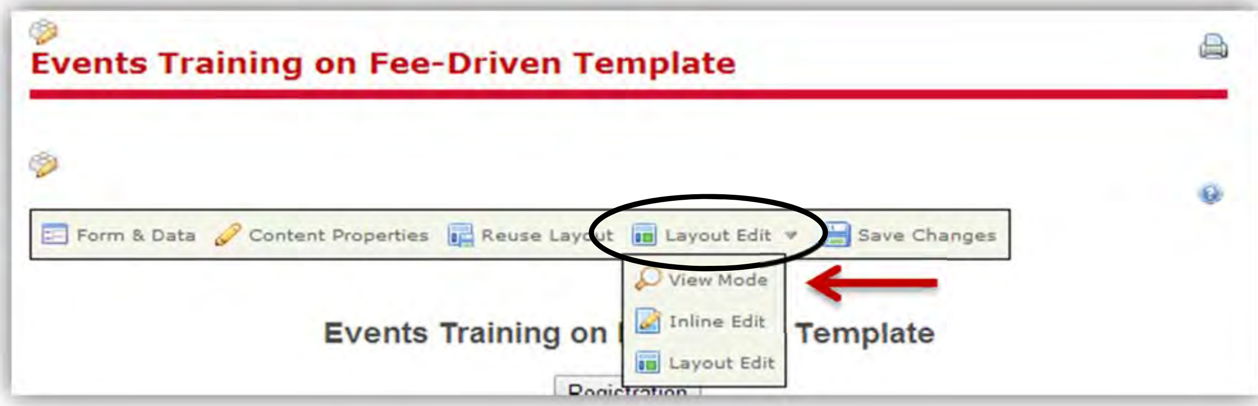
Step 7: **Click on the content area that is shaded in green** and the **Modify Layout** window will appear.

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**.