Module: Events

Function: The event module is used to populate club events onto the calendar. Events can be set as a single event or reoccurring; they can also enable reservations to be accepted. The events calendar can be viewed in a daily, weekly or monthly format. Most event calendars are displayed on the Member side of the website.

Key Points to Remember:

- There are 3 possible steps involved in creating an event:
    1. **Description**
    2. **Reoccurrence**
    3. **Reservations**
- The default display is the month format, but can be changed using the filters at the top of the page above the calendar
- A white box around an event signifies an 'all day' event
- 'All Day' events will appear at the top of the daily listing in member view
- Two chasing arrows indicates this is a reoccurring event
- **Very important-**When setting a reoccurring event, be sure the initial start date and end date are on the SAME DATE-do not set it to span over 24 hours! Future dates of when the event will repeat will be selected in the reoccurrence section.

Contents:

Create an Event-Step 1 Description

1. Log in as an administrator
2. Click the **Events tab** in the left navigation
3. In the top, left corner…click the **new button>event**
4. **Name** the event
5. **Enter a category** by clicking the looking glass
6. Select a category from the list or click the quick add button to add a new category
7. **Click OK** once you select the category
8. **Set the start date/time and the end date/time**
   - Use the dropdown arrow to access the calendar and select a date
   - Use the dropdown arrow to select a time. Time appears in 30 minute increments-to change, place your curser at the end of the time you wish to change, backspace, add the new time. This helps keeps the proper time formatting
   - The time will control the order in which the event appears on the calendar
   - If this is an All Day Event, place a checkmark in the box --all day events will appear at the very top of the list (make sure start and end date are the same)
9. Indicate with a checkmark if this event is viewable by Members and/or Employees
10. Use the editor to add details
    Tip: Many clubs will create a flyer in an external program, save it as a jpg and add it as an image in the editor
11. Move to step 2

Step 2-Reoccurance

12. In the upper corner of the left navigation, select **Reoccurrence**
13. A new box will appear under the event information. If the event will be a reoccurring event, **select the reoccurrence pattern** (daily, weekly, monthly, yearly)
14. If necessary, adjust the event time for the reoccurring dates
15. Fill in the box to indicate **how often** the event will reoccur
16. Select the pattern the event will reoccur (varies on selection)
17. **Set the range of reoccurrence**-the start date will be the first day of the original event, then select an end date by one of these criteria
    - No end date
    - End after _ number of reoccurrences
    - End by a specific date
18. Move to step 3

Step 3-Reservations

19. If this event does NOT except reservations, click Save and Close to save the event

20. If this event **DOES except reservations**, click the box to **enable reservations** for this event
21. Select the **Area** where the event will take place, click the looking glass for a list of options. If you need to add a new option-use the quick add feature to add a new area.
22. **Layout**-this is not often used; however it can be used for the benefit of the staff to add a layout description such as "20 rounds". Use the dropdown to make a selection
23. **Location**-can be used to add further description to the Area
24. Continuing down the left navigation, click the **Activity tab**
25. The **Activity tab** is used to **set the criteria** of when reservations can be opened, closed, modified and cancelled
26. The **Attendees tab** is used to **set attendance limits** (max headcount and if a waitlist will be allowed). The option to view the guest list is also available on this tab. *Club administrators can come to this tab to add member reservations or manage the waitlist-this is an easy way to keep all reservations in one place
27. **Servers Tab**-although this is not commonly used, you have the ability to assign which servers are working the event (pulls from staff roster)
28. **Event Pricing-**Very important for Member billing; ties into the POS system.
    - **Create a New Price**
    - **Name the price field** ex: Yoga class/Member
    - **Price-enter a price**
    - **POS Item-**click the looking glass to select a POS item. Typically, the POS item will already be created in the system. If it is not, you will need to create the POS item. Ex: Fitness instruction per hour
    - **Combo-**multiple event charges can be put together into a package price. The combo feature allows you to breakdown the items in the package price, so they can be billed to the respective departments in POS
    - **No Show-**If your club enforces a No Show fee, this can be set here. Select your Item "No Show" and add the price.
    - **Additional Options-**Minimum and Maximum Headcount limits can be set
    - **Save and Close**
29. **Notifications-**the system can be set send out an automated email notification
    - **Member Notifications**-reservation confirmations or event reminders can be set to atomically send to the member
    - **Admin Notifications-**Select from the list what types of notifications administrators would like to receive regarding event registrations
30. **Event Administrators-**select event administrators from the list to manage the reservations and receive notifications
31. **Accommodations-**will show as a checkbox on the reservation. Ex: highchair, gluten free, peanut allergy
32. **Attachments-**attach a file such as a PDF, this is for internal use, not displayed to members
33. **Save and Close Event**

Additional Options

1. **Reoccurring Events-**administrators have the ability to open an individual event (initially programmed as a reoccurring event) and make changes specific to that event date without change all the linked events.
2. **Delete an Event-**click on an event name and click the delete button at the top to remove from the calendar
3. **Manage event categories and accommodations** by clicking **Events>Manage** from the top navigation
4. Once an event has been created, administrators can **view a report of reservations**.
   - From the top navigation, click Reports>Reports Home>on the top left corner, select Membership>Event Registrations.
   - Select the event from the drop down
   - Click the View Report Button
   - Reports can be printed, exported or saved