

# I. Introduction

## 1. General Overview

The Events Planner module is designed to allow clubs to create and maintain events for their club all within a centralized location. This tool simplifies the process of creating an event, having members register online, having members pay online (provided you have the Online Payment & eCommerce module) and reporting on who has registered and who has declined.

On the Events Planner home page, you will find a complete listing of all the upcoming events along with their corresponding event chairs.



## 2. Events

The events page displays a listing of the upcoming events created by event chairs. Events are listed in chronological order. From this page the event chair will have the ability to create, open (edit) and remove an event.

Events						<a href="#">Create A New Event</a>
All Upcoming Events						<a href="#">View All Events</a>
<a href="#">Event Date ▲</a>	<a href="#">Event Name</a>	Active	Location	Event Chair	Actions	
Oct 30, 2012	<a href="#">Golf Tournament</a>	✔		Ron Murrell	<a href="#">Open</a>   <a href="#">Delete</a>	

### LINKS AND FUNCTIONS

**Create a New Event:** Allows the user to create a new event.

**View All Events:** Displays all past events that are no longer active.

**Open:** Allows the Event Chair to edit the event details and register members/guests.

**Delete:** This will delete the event and remove it from the event list.

*Only site administrators (level 30) can click the 'Delete' button, otherwise the button appears grayed out for all others.*

**Event Name:** Clicking on the event name will also take the Event chair to the details of the event.

### 3. Who Can Create and Manage Events?

A member must have minimum access rights of **Editor** (level **60**) or better. This will allow you to:

- Add and edit events from the events list
- Assign Event Chairs to events
- Determine whether the event should be displayed on the homepage, bulletin, district calendar, etc.

*NOTE: Once you are an Event Chair for an event, regardless of your access rights level, you will have full access to that event, except deletion of the event.*

Who can click the **‘Delete’** button for an event? Only *Site admins (level 30)* can delete an event.

## II. Getting Started

### 1. Setup a New Event

From the Admin screen, start by looking under the **Website Manager** section and click on the **Events 2.0** link. Next, click on the **“Create a New Event”** button.

**Event Name:**

**Event Code:**

**Status:**  Active  Draft

**Event Type:** General

**Start Date & Time:**     Tip: Type 'A' or 'P' to switch AM/PM.

**End Date & Time:**     Tip: Type 'A' or 'P' to switch AM/PM. Leave blank if not applicable

**Description:** To add a single line break, hold down Shift and press Enter.

Rich text editor toolbar:

**Event Name:** Describes the name of the event being created. This is a required field.

**Event Code:** Enter a unique code which will make it easier for you to track payments for events from within your merchant account (Eg. Sage or Beanstream). All payment transactions for the event will have the same code.

**Status:** Active will allow registrations if registrations have been configured. Draft will **NOT** allow registrations even if registrations have been configured.

**Event Type:** Choose the type of event from the drop down box. If none match, please use general.

**Start Date & Time:** This specifies the start date and time of the event. This is a required field. **Times are based on Eastern Standard Time.**

**End Date & Time:** This specifies the end date and time of the event. This is a required field. **Times are based on Eastern Standard Time.**

**Description:** This is used for the event chair to put custom information about the event (i.e.: If there were special details about the event or sponsors you wanted to add).

**Would you like to enable registration now?**  Yes  No

**Image:**  [Browse...](#)

**Event Chair:**

**Email:**

**Phone:**

**Location:**

**Address 1:**

**Address 2:**

**City:**

**Zip/Postal Code:**

**Country:**

**State:**

**Would you like to enable registration now:** This enables registration for the event after you click the **Save** button at the bottom of the page.

**Image:** The Event Chair can upload an image to be displayed with the event details.



Image as displayed on Homepage

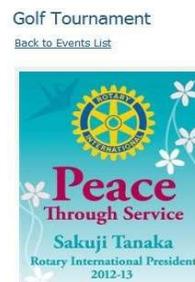


Image as displayed on View Registration Form

**Event Chair:** This is the owner of the event. By default, the system will select the member that is creating the event. To change the event chair, click on the down arrow and simply select a new member. Both **Honorary** and **Other Users** are also eligible to be event chairs.

**Email:** By default, this field displays the email of the person that is creating the event but this can be edited. If members reply to the event email(s), their replies would be sent to this email address.

**Phone:** Gives you the option to display a number for registrants to call should they require any information from the event chair.

**Location:** Field to display the location where the event is taking place (ex: Hilton Hotel – Ball Room 1).

**Address (1 & 2):** These fields are used to describe the address location of the event.

**City:** Defines the city where the event is taking place.

**Zip/Postal Code:** Defines the Zip code or Postal code of the event.

**Country:** Defines the country where the event is taking place.

**Province/State:** Defines the province (Canada) or the state (US) where the event is taking place.

**NOTE:** If address information is filled in correctly then the **View Map** link will pinpoint the location on the **Event Services** screen.

**Show Event in home page?**  Yes  No

**Show Event in Calendar?**  Yes  No

**Show In Events List?**  Yes  No

**Show Event in Bulletin?**  Yes  No

**Display Social Media Share Bar?**  Yes  No

**Show Event in District Calendar?**  Yes  No

**Show Map?**  Yes  No

**Show Event in home page:** This field gives the event chair the option to display the event on the homepage. Please note however, the event widget **must** be on the homepage for this option to display the event. Selecting **No** will hide the event from the home page.

**Show Event in Calendar:** Gives the option to display the event on the mini calendar on the homepage and on the Club calendar. The mini calendar widget must be on the homepage for this option to display the event. Selecting **No** will hide the event from the mini calendar and from the homepage calendar menu option.

**Show In Events List:** Gives the option to display the event on the **Events List** page and **Events** widget on the homepage, if you have the **Events** widget on it. Selecting **No** will hide the event from the **Events List** page and **Events** widget.

**Show Event In Bulletin:** Gives the option to display the event on the bulletin, if have the **Events** widget on the bulletin. Selecting **No** will hide the event from the bulletin.

**Display Social Media Share Bar:** Gives the option to display the share button for Facebook, Twitter, Linked in, Google+, and more located at the very bottom of the event’s page. It looks like the below image:



**Show Event in District Calendar:** Gives the option to display the event on the district calendar, both on the mini calendar as well as on the homepage calendar menu option. Selecting **No** will hide the event from the district calendar.

**Show Map:** If the address was filled in above, a Google map of the address will be displayed at the bottom of the event’s page.

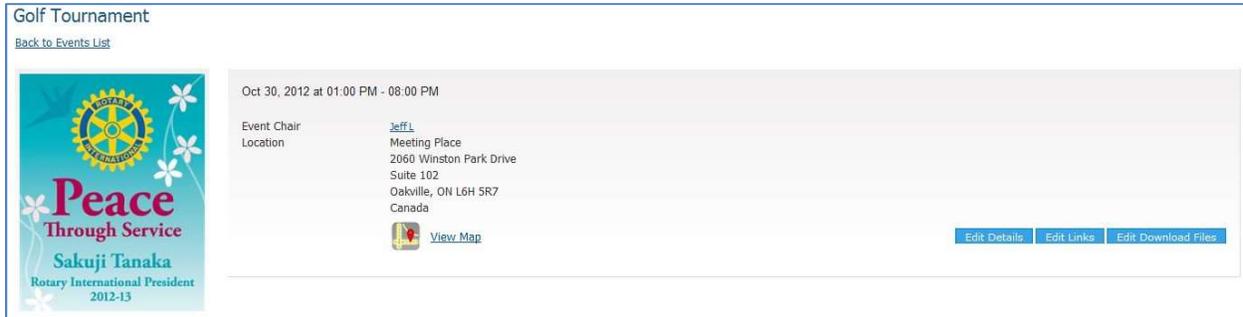
**Save:** This will save the event with the details that you provided. Three required fields must be populated for the event to successfully save - **Event Name, Start Date & Time, and End Date & Time** (highlighted in red). If all the information has been entered correctly you will see the following message at the top of the screen once you save:

Your event Test Event has been created.

**Cancel:** This will disregard the changes that you made and not create the event.

## 2. Event Services

After you have created your event, you are directed to the **Event Services** screen. Here you can edit the details of the event, setup your registration, payment settings and configure invitation emails.



**Edit Details:** This link will take the event chair to the [Edit Details](#) details of the event from where they will be able to edit the date and time, select a new event

**Edit Links:** This link will allow the event chair to add URL links for the event. The added links will be displayed on the homepage event right under the image.

**Edit Download Files:** This link will allow the event chair to add files that registering members may want/need before registering for an event. The added download files will be displayed on the homepage event right under the related links.

## a) Registration

Registration defines when members can sign up for the event. If no registration is setup then no one will be able to sign up.

To configure the registration options click on the: [Edit Registration Options](#) link or click on the edit registration options button: [Edit Registration Options](#)

Event Registration Options

**Open this event for registration**  *Uncheck this checkbox if you wish to disable registration*

**Date range to accept registrations:**

**Start Date & Time** Sep 20, 2012 12:00 AM Tip: Type 'A' or 'P' to switch AM/PM.

**End Date & Time** Sep 26, 2012 12:00 AM Tip: Type 'A' or 'P' to switch AM/PM.

**Is there a fee to attend this event?** No, it is free. To change the fee or currency, please go to Payment Settings.

**Allow public registration?**

Please verify the registration Start Date & Time and End Date & Time as they are automatically displayed. Click 'Save' to accept.

**Open this event for registration:** By default when you come to this screen the checkbox should be checked. If you wish to disable registration, simply uncheck this box and save.

**Start Date & Time:** This defines when members can start to register for the event. **Please note that the times are based on Eastern Standard Time.**

**End Date & Time:** This defines the date and time for when the registration form will expire, after which guests will no longer be able to register for the event. **Please note that the times are based on Eastern Standard Time.**

**Is there a fee to attend this event:** To configure the fee for the event, you will need to go to Payment Settings (refer to section b, below).

**Allow Public Registration:** If this option is checked, then non-members will also be able to register for the event. If the option is not checked, then only members of the club may register for the event.

**Save:** This will save the registration details that you provided. You will then notice that all of this information has been populated on the **Event Services** screen.

**Cancel:** This will disregard the changes that you made and not save the registration details.

## b) Payment Settings

Event Chairs have the ability to set the payment options for the event. Follow the outlined steps to set the payment options:

Payment Settings

Change Payment Settings

Event Fee: 0.00

Currency:

Payment Method: No payment account specified

Pay to Register? No

Check Allowed? No

1. Click on the **Change Payment Settings** button. 
2. The first field you will need to populate will be the **Event Fee** field. Here, you will set the total fee for the event. **Note: You are only able to set one fee for the event.**

Event Fee: 25.00

3. Next, select the Currency from the drop down field.

Currency: US Dollar ▼

4. Next is **Payment Method**. If you have the Online Payment & eCommerce module setup, then you will see it as a selectable option. If you do not have this module, then you will only have the **No Payment Account Specified** option available only.

Payment Method:

No payment account specified

Sage Payment Solutions: Sage Test Payment Account (978985210861) - USD

To find out more about the Online Payment & eCommerce Module:

For pricing for US customers, please click [here](#).

For pricing for Canadian customers, please click [here](#).

### 3. Register Overview



5. Next is **Require members to pay to complete registration**. This option allows you to force the members to pay by credit card to complete registration.

**Require members to pay to complete registration?**  No  Yes

6. The next field will be the **Do you wish allow payment by check?** option. Simply select **No** if your club does not allow checks or **Yes** if your club does allow them.

**Do you wish allow payment by check?**  No  Yes

7. When satisfied with the Payment Settings that you have applied, click the **Save** button. If you do not want to save the current changes that you made then click the **Cancel** button.

**View Registration Form:** This will display the registration form as seen by registrants when they are registering for the event.

**Register Members:** This gives the Event Chair the ability to register or decline members for the event.

**Register members from other clubs:** This gives the Event Chair the flexibility to register members of other clubs within the district.

**Register non-members:** This gives the Event Chair the ability to register non-members of the club for the event.

## a) View Registration Form – To Register Yourself

### Register Me

**Register Me:** When the registering member clicks this button they will be registering themselves for the event. Some contact information fields will appear. Upon clicking on the **Confirm** button to finish registering for the event, this individual will get an email with the registration details.

**Decline:** When the member clicks this button they have declined to attend the event.

**NOTE:** If you have registered for an event but you wish to unregister yourself, then simply click on the **Unregister Me** button. The member will get an email stating they are no longer registered for the event.

### Guests

If you wish to bring along family members or friends, you may also register them by clicking on the **Register Additional Guests** button. The guest's event fee (if there is one) will be put on the members account.

**First name:** Enter the first name of the guest. This is a required field.

**Last name:** Enter the last name of the guest. This is a required field.

**Name Tag:** Enter the information that you would like to be displayed on a Name Tag.

**Email:** Enter the guests email address to have them receive a confirmation email stating they are registered for the event.

**Phone:** Enter the phone number of the guest in case they need to be reached.

**Save:** This will save the guest registration details that you provided and will register the guest. The guest will then get an email that contains their confirmation number.

**Cancel:** This will disregard the changes that you made and will not register the guest.

**NOTE:** If you wish to edit the Guest details after they have been registered then click on the **Edit** (paper and pencil) icon. If you wish to unregister a guest, simply click on the **Unregister** (recycling bin) icon. If you unregister a guest they will receive an email letting them know they are no longer registered for the event.

Guests:	Confirmation No.	Actions
Lisa H	30623	 

## Pay Online Overview

**Pay Online**

You can make a secure, online payment for this event. Click the button below to proceed. You can still cancel at the next step.

You have a balance owing of \$25.00

The Pay Online section gives registering members the ability to pay for the event online. If the club is setup with the Online Payment & eCommerce module then the members can pay by credit card online. If the club is not setup with the Online Payment & eCommerce module then the only online option the registering members would have is to pay by check.

To find out more about the Online Payment & eCommerce Module:

- For pricing for US customers, please click [here](#).
- For pricing for Canadian customers, please click [here](#).

Click on the **Proceed with Payment** button to pay for the event.

## Payment Summary

This section details the registered members confirmation number, registered members name, email address and phone number. It also displays the total amount for the event, total payments and balance due. All of this information is read only.

Payment Summary			
Confirmation #	Attendee Name	Attendee Email	Attendee Phone
30691	Ron	ron	
<b>Total Amount</b>	\$25.00		
<b>Total Payments</b>	\$0.00		
<b>Balance Due</b>	\$25.00		

## Payment History

This section displays the history of payments that the registered member has made for an event. To record a payment, simply click on the Record Payment button.

**NOTE: Only the Event Chair can see the Record Payment button.**

Payment History			
<a href="#">Record Payment</a>			
Payment Date	Payment Type	Amount	Additional Information
No payments have been made.			

**Balance:** Read only field; displays the balance due for the registered member.

**Payment Type:** Allows you to select payment option (i.e.: pay by check, pay by cash, & refund).

**Amount:** This is the amount that is being paid by the registered member.

**Comments:** Allows the event chair to add comments about the transaction.

<b>Balance</b>	\$ 25.00
<b>Payment Type</b>	Pay By Check ▾
<b>Amount</b>	25.00
<b>Comments</b>	<input type="text"/>

When the payment has been made you will see a record of the transaction in the payment history table. This history table is read only. You will not be able to delete these historical records. This table also includes any credit card transaction history.

Payment History			
Payment Date	Payment Type	Amount	Additional Information
Sep 20, 2012	Cash	25.00	

## Payment\*

The payment section will contain a button only if the payment method is other than “**No payment account specified**”.

In Event Payment settings, if **Sage Payment Solutions** or **Beanstream** is selected as the payment method, then you will see a “**Pay by Credit Card**” button:

**Payment Method:**  No payment account specified  
 **Sage Payment Solutions: Sage Test Payment Account**

Payment

Pay by Credit Card

Upon clicking on Pay by Credit Card, the payee will be taken to the following screen:

Make a payment

PST/State Tax:	\$ 0.00
GST/Fed Tax:	\$ 0.00
<b>Amount you should pay:</b>	<b>\$ 50.00</b>

Please fill in your credit card information

Payment Type

Credit Card Number

Expiry Date

First Name

Last Name

Billing Address Line 1

Billing Address Line 2

City

Country

State/Province

Zip/Postal Code

Phone Associated with Credit Card

Email

VISA  MasterCard  American Express  DISCOVER

Format: MMYY

na

na

US

Submit

The member would then fill in all the information and click the **Submit** button. This information would then be sent to the merchant (Sage or Beanstream).

**Note:** ClubRunner does NOT have access to this information. Upon successfully completing the transaction, the payee would receive an email with an order number and approval code, confirming that an online transaction took place.

In Event Payment settings, if **Do you wish allow payment by check** is set to **Yes**, then the payee would see a box of details regarding who to make the check payable to and where to send it.

## Register Members

This section gives the event chair the ability to register or decline members of the club for the event.

Member	Attending	Balance Owing	Additional
<input type="checkbox"/> <b>Select All</b>			
<input type="checkbox"/> Jeff	Register Decline		
<input type="checkbox"/> Ron	<u>Attending</u> Decline X		
<input type="checkbox"/> Divya	Register Decline		
<input type="checkbox"/> eli	Register Decline		
<input type="checkbox"/> Vi	Register Decline		

**Register Button:** Clicking this will register the member for the event. When you click the register button a message box will appear verifying that you want to mark this member as Attending. Upon clicking on **OK**, you will see the Register button will change to **Attending**, underlined in green. This action will also prompt the system to send an email to the member letting them know that they have been registered and are marked as attending the event.

If payments have been setup for the event, then under the balance owing you will see the amount the member now owes with a 'pay' button next to it.

Member	Attending	Balance Owing
<input type="checkbox"/> <b>Select All</b>		
<input type="checkbox"/> L, Jeff	<u>Attending</u> Decline X	50.00 Pay

**Decline Button:** Clicking this will decline the member from the event. When you click the decline button, a message box will appear verifying that you want to mark this member as declined. When you click OK you will see the Decline button change to **Declined**, underlined in red. This will then prompt the system to send an email to the member letting them know that they have been marked as declined.

Member	Attending	Balance Owing
<input type="checkbox"/> <b>Select All</b>		
<input type="checkbox"/> L, Jeff	Register <u>Declined</u> X	

**Add Guests:** As the event chair you have the ability to add guests that would be registering for the event along with a club member. Simply click on the **Add Guests** button on the same row as the member's name.

Member	Attending	Balance Owing	Additional
<input type="checkbox"/> Select All			
<input type="checkbox"/> L, Jeff	<a href="#">Register</a> <a href="#">Decline</a>		<a href="#">Add Guests</a>

Next, fill in the fields to specify the name, email address and phone number for the guest.

**First name:** Enter the first name of the guest. This is a required field.

**Last name:** Enter the last name of the guest. This is a required field.

**Email:** Enter the guests email address to have them receive a confirmation email, that they are registered for the event.

**Phone:** Enter the phone number of the guest in case they need to be reached.

**Name Tag:** Enter the information that you would like to be displayed on a name tag.

**First Name**

**Last Name**

**Email**

**Phone**

**Name Tag**

[Save](#) | [Cancel](#)

**Save:** This will save the guest registration details that you provided and register the guest. The guest will get an email that contains the confirmation number. If there is a payment setup with the event then the member will get the balance owing for the guest.

**Cancel:** This will disregard the changes that you made and will not register the guest.

If you wish to edit the guest details after they have been registered, simply click on the edit (paper and pencil) icon. If you wish to unregister a guest, simply click on the unregister (recycling bin) icon. If you unregister a guest, they will receive an email letting them know they are no longer registered for the event.

Member	Attending	Balance Owing	Additional
<input type="checkbox"/> Select All			
<input type="checkbox"/> L, Jeff	<a href="#">Register</a> <a href="#">Decline</a>		<div style="border: 1px solid #ccc; padding: 5px;"> <p style="text-align: center;">John Smith</p> <p style="text-align: right;"> </p> </div>

**Pay:** This gives the event chair the ability to mark the payment for the member. Please review Pay Summary on Page 10.

Register All Selected

Decline All Selected

Unregister All Selected

**Register All Selected:** Clicking this button will register all selected members. If a member has already declined, it will skip them even if they were selected.

**Decline All Selected:** Clicking this button will decline all selected members. If a member has already registered, it will skip them even if they were selected.

**Unregister All Selected:** Clicking this button will set everyone **that is selected** back to undecided (**even Registered or Declined members**). If a member was registered and paid but was included in the unregister all then within the balance owing column, they will see a **“CR”** followed by the amount they paid marked as a credit.

<b>Balance Owing</b>
CR 50.00

## Register Members from Other Clubs

This gives the event chair the flexibility to register members of other clubs within the district. Follow the steps below to add a member from another club to your event.

Register members of club

Select Club: --- Select Club --- Show Club Registrations

Page Size: 50  Include Other Members Sort By First Name

Member	Attending	Balance	Additional
No Club Members			

1. For the **Select Club** field click on the down arrow to select the club.

Select Club --- Select Club ---

2. Next, click on the **Show Club Registrations** button to see all the eligible members.

Show Club Registrations

3. Here you have the choice of registering members from the other club.

Member	Attending	Balance Owing
<input type="checkbox"/> <b>Select All</b>		
<input type="checkbox"/> Gabby Eckler	<span>Register</span> <span>Decline</span>	
<input type="checkbox"/> Bob Baker	<span>Register</span> <span>Decline</span>	
<input type="checkbox"/> Shelly Herman	<span>Register</span> <span>Decline</span>	
<input type="checkbox"/> Santana S.	<span>Register</span> <span>Decline</span>	

Refer to page 13 on registering and further instructions.

## Register Non-Members

This gives the event chair the ability to register non-members of the club for the event. Below are the steps for adding a non-member for the event:

Guests:	Attending	Balance Owing	Comments	Additional
No Registered Guests				

1. Click on the **Register Additional Guests** button to add a guest to the event.
2. Populate the Guest fields. **First Name**, **Last Name** and **Email** are all required fields.

<b>First Name:</b>	<input type="text"/>	<b>Email</b>	<input type="text"/>	<a href="#">Save</a>   <a href="#">Cancel</a>
<b>Last Name:</b>	<input type="text"/>	<b>Phone</b>	<input type="text"/>	
<b>Confirmation No.</b>	[New]	<b>Tag Name</b>	<input type="text"/>	

3. Now Click on the **Save** link.

Guests:	Attending	Balance Owing	Additional
Doe, Jane	<a href="#">Cancel</a>	50.00 <a href="#">Pay</a>	<a href="#">Add Guests</a>

After registering a guest the Event Chair has the option to:

<b>Attending</b>	<b>Balance Owing</b>
<a href="#">Cancel</a>	50.00 <a href="#">Pay</a>

**Cancel (Attending):** By clicking the cancel button, under the Attending column, you will unregister the guest from the event. The guest will receive an email indicating they are no longer registered

**Balance Owing:** Please see page 10 for Pay options.

## 4. Reports Overview

**Registered Attendees (Summary):** This will generate a simple report that displays the number of members registered and the number of guests registered.

**Registered Attendees (Detail):** This will display the registered attendees confirmation number, first and last name and (for guests) whom they were invited by).

**Alphabetical List of Attendees:** This will display a list of all registered attendees in alphabetical order.



**Download Attendees List:** This will allow you to download an excel file listing all the attendees.

**Download Payment Report:** This will allow you to download an excel file displaying all registered members, total charges, total Paid and balance owing.

**Club Registration Status Report:** This is a breakdown report outlining who has registered, declined and who is still undecided.

**Prepare Name tags:** Creates name tags for all registered attendees and guests.

## Prepare Name Tags

Below are the steps for creating Name Tags.

Create name tags for all registered attendees and guests. Please select the Payment Process and Tag Types, then click the "Generate" button.

**Payment Process**  Paid  UnPaid  All

**Select Tag Type** Badge Type ▾

**Label Type:** Avery 05392 Name Badge Inserts (4" x 3")  
**Paper Size:** 8.5" x 11"  
**Tag Layout:** 3 rows x 2 columns

1. First you need to select who you would like to create the name tags for: Paid, UnPaid, or All.

**Payment Process**  Paid  UnPaid  All

2. Next, select whether you want the name tag to be a **Badge Type** or **Sticker Type**. The difference is in the label type and the tag layout (# of rows x columns)

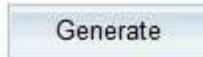
Select Tag Type Badge Type ▾

**Label Type:** Avery 05392 Name Badge Inserts (4" x 3")  
**Paper Size:** 8.5" x 11"  
**Tag Layout:** 3 rows x 2 columns

Select Tag Type Sticker Type ▾

**Label Type:** Avery 5163 Shipping (4" X 2")  
**Paper Size:** 8.5" x 11"  
**Tag Layout:** 5 rows x 2 columns

3. Finally, click the Generate button.



## 5. Emails

There are **two** options for sending event emails:



**New Invitation:** Is a template email message that sends an invitation for the event to the selected recipients. The recipients then receive an email containing the details of the event along with an **Attend or Decline** button that takes them to the homepage event registration form.

**New Email:** This is your typical email, no template, no event information just a blank editor for you to enter what you would like.

## New Invitation

### Step 1: Select Recipients.

The event chair will first need to select who the recipients of the email will be.

**By Status** – Contains groups of member or non-members who are registered, declined, active members – undecided and other members – undecided.

**Active and Honorary Members** – Contains the active club members and honorary members.

**Other Users** – Contains the other users.

**Inactive Members** – Contains inactive/ terminated members.

**Custom Distribution Lists** – A Custom list consisting of various members from the club.

- + By Status (0/18)
- + Active and Honorary Members (0/16)
- + Other Users (0/2)
- + Inactive Members (0/3)
- + Custom Distribution Lists (0/15)

Clicking on the  icon will open the list.

- Active and Honorary Members (0/16)
  - Active [Expand List \(0/16\)](#)

Clicking on the **Expand List** link will display all the members for that group. You then have the option to check who you want to receive the invitation by selecting the checkbox next to their name.

Active and Honorary Members - Active. Please select recipients. x

Select All 0 out of 16 recipients selected

Filter recipients:

**Member Name** ▼

- Baker, Sue
- Brackett, Leigh
- Harris, Clare
- Jones, Mickey
- Kornbluth, Cyril

**Step 2:** Enter your email subject and message.

The next area is where event chair designs the invitation. Even though the invitation pre-loads a template, it is customizable meaning you can add or delete the content within the editor.

Below are the steps on how to setup and configure the invitation:

1. The **Select Template** fields are currently not used. The purpose is to have multiple templates for event chairs to choose which would suit them best.

2. **Subject** – This is where the event chair would enter a subject for the event invitation. This is a required field.

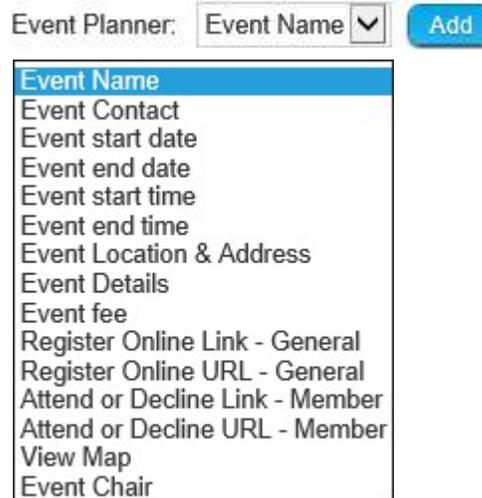
### 3. Insert Mail Merge Fields Overview

**Recipient:** This drop down field is used for the event chair to identify the recipient and inserts that information into the body of the invitation. For example if the event chair selects *Recipient First Name* then the invitation will display the members’ first name.

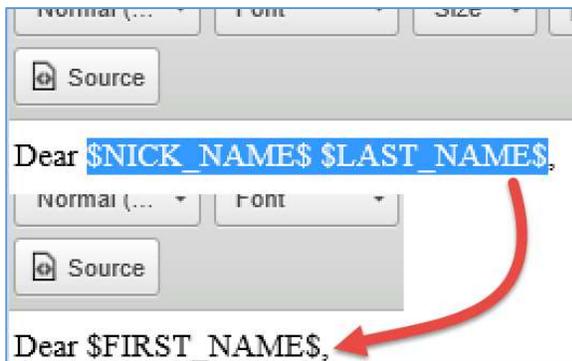
**Sender:** This drop down field is used for the Event Chair to identify the sender and inserts that information into the body of the invitation. For example if the event chair selects *Sender First Name* then in the invitation will display the senders’ first name.

**Account:** This drop down field is used to display the club name and website. The information here is pulled from the Edit Club Info & Settings which can be found under the Administrator section in the Admin page

**Event Planner:** This drop down field is used to display the event’s information.



4. Simply highlight or put your mouse cursor in the editor area where you would like the merge fields to appear.



**Tip:** If you want to replace a merge tag in the editor with another one, simply highlight which want to replace and select the mail merge tag you want within your email.

**Step 3 (Optional):** Upload attachments to your email.

If you would like to add an attachment to the invitation, simply click on the **Select Files For Upload** button.



Now simply browse your computer and select the file that you would like to attach. Please keep in mind that there is a 6 MB limit to how big the attachment can be.

**Step 4:** Choose your email options and send.

Right before you send the invitation you have two options:

- Send a list of recipients as an attachment.
- Copy me on this email.

**Send a list of recipients as an attachment:** This option will send the sender a list of recipients as an attachment.

**Copy me on this email:** Will add the sender to the CC (carbon copy) list.

**Step 5:** Sending the email.

You now have two options:

**Send right now:** Send the email now.

**Schedule:** Can set a time and date to auto send the email.

After you select one of the options you have **three** choices:



**Send:** This will send the email to the selected member(s).

**Save as Draft:** This will save the email template (including all changes that you made) as a draft in your **Emails** section for you to use later. When you click this button you will see a saving message on your screen.

**Send to Myself:** This will send an email to yourself. You can use this as a test email. The mail merge fields in the email will not appear when you receive the email.

## New Email

### Step 1: Select Recipients.

The event chair will first need to select who the recipients of the email will be.

**By Status** – Contains groups of member or non-members who are registered, declined, active members – undecided and other members – undecided.

**Active and Honorary Members** – Contains the active club members and honorary members.

**Other Users** – Contains the other users.

**Inactive Members** – Contains inactive/ terminated members.

**Custom Distribution Lists** – A Custom list consisting of various members from the club.

Clicking on the  icon will open the list.

Clicking on the **Expand List** link will display all the members for that group. You then have the option to check who you want to receive the invitation by selecting the checkbox next to their name.

**Step 2:** Enter your email subject and message.

This is where the event chair designs the email. It is customizable, meaning you can add or delete the content within the editor window.

Below are the steps on how to setup and configure the email:

1. The **Select Template** fields are currently not used. The purpose is to have multiple templates for editors to choose which would suit them best.

2. **Subject** – This is where the event chair would enter a subject for the event invitation. This is a required field.

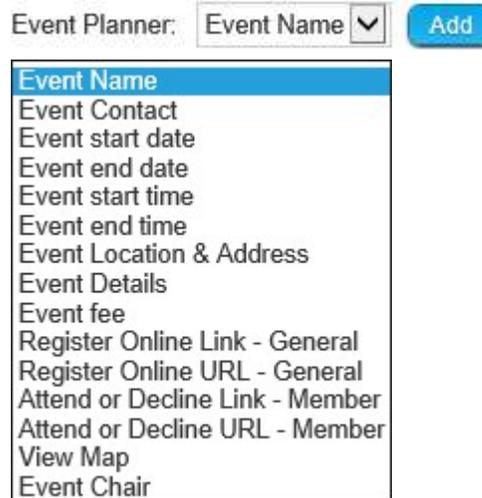
### 3. Insert Mail Merge Fields Overview

**Recipient:** This drop down field is used for the event chair to identify the recipient and inserts that information into the body of the invitation. For example if the event chair selects *Recipient First Name* then the invitation will display the members’ first name.

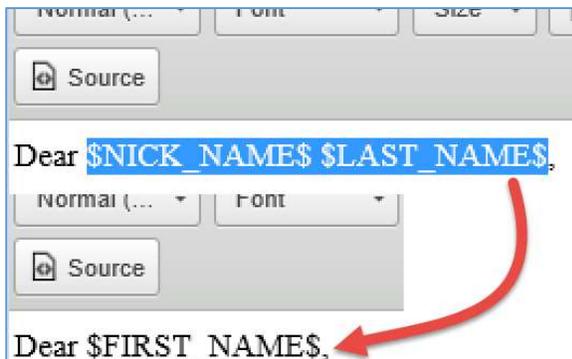
**Sender:** This drop down field is used for the Event Chair to identify the sender and inserts that information into the body of the invitation. For example if the event chair selects *Sender First Name* then in the invitation will display the senders’ first name.

**Account:** This drop down field is used to display the club name and website. The information here is pulled from the Edit Club Info & Settings which can be found under the Administrator section in the Admin page

**Event Planner:** This drop down field is used to display the event’s information.



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**Send:** This will send the email to the selected member(s).

**Save as Draft:** This will save the email template (including all changes that you made) as a draft in your **Emails** section for you to use later. When you click this button you will see a saving message on your screen.

**Send to Myself:** This will send an email to yourself. You can use this as a test email. The mail merge fields in the email will not appear when you receive the email.

### III. How do Members Register for an Event

There are two options for members to register for an event. One is via your website and the other is through email.

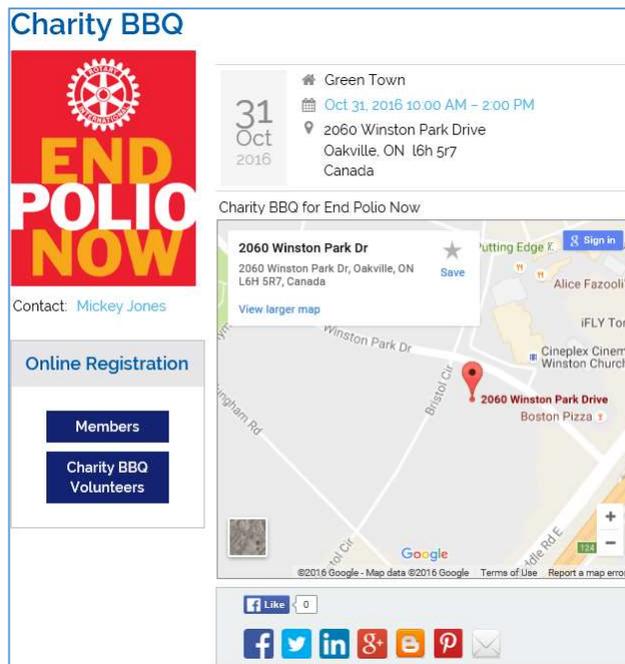
#### 1. Website

**Option 1** is to have the members go to the homepage. If you have the club upcoming events widget displayed on your homepage then:

1. Have the member go to the homepage and under the **Upcoming Events** widget, select the event to reach the event details page.



2. Look under the **Register Online** section and click on the **Members** link.



3. Registrants will be asked to login if they haven't logged in already.

Enter your login information below:

Login Name

Password

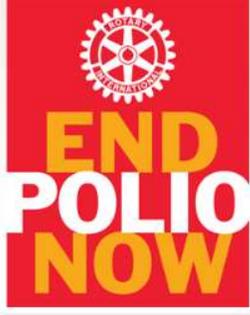
Keep me logged in

[Login »](#)

[New and existing users: retrieve login and/or reset password](#)

4. Upon a successful login, the member will be taken to the Registration form. Under the Register Me section the member should click on either the **Register Me** button or the **Decline** button.

**Charity BBQ**  
[Back to Event Services](#)



Oct 31, 2016 at 10:00 AM - 02:00 PM

Event Type: General

Event Code: [\[Link\]](#)

Event Chair: [Mickey Jones](#)

Location: 2060 Winston Park Drive  
Oakville, ON L6h 5r7  
Canada

 [View Map](#)

Event Description: Charity BBQ for End Polio Now

You are currently not registered for this event.

[See Who Else is Registered](#)

For the rest of the details about registering please go to the next page.

## 2. Email Invitation

Option 2 is to email the members an invitation to the event:

You are invited to the Charity BBQ Please click on the link below to attend or decline. You can also book family and friends.

**Event:** Charity BBQ

**Date:** [Oct 31, 2016 10:00 AM – 2:00 PM](#)

**Fee:** \$25

2060 Winston Park Drive

**Location:** Oakville, ON L6h 5r7  
Canada

[View Map](#)

**Details:**

[Attend or Decline as Mickey](#)

*Note that the link above has been specially coded with your login information and should be deleted before forwarding this email to others.*

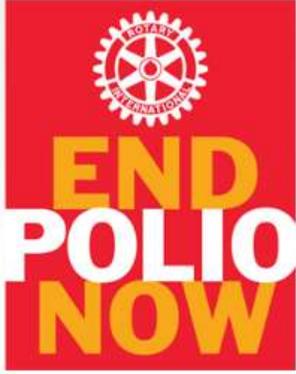
If you were forwarded this email from the member above, use this link to register instead:

[Register Online](#)

1. If an email is sent, then members receive an email like the one above. This email contains an Attend or Decline link.
2. Clicking the link will direct the member to the Event Member Registration screen:

### Charity BBQ

[Back to Event Services](#)



Oct 31, 2016 at 10:00 AM - 02:00 PM

Event Type: General

Event Code:

Event Chair: [Mickey Jones](#)

Location: 2060 Winston Park Drive  
Oakville, ON L6h 5r7  
Canada

 [View Map](#)

Event Description: Charity BBQ for End Polio Now

You are currently not registered for this event.

[See Who Else is Registered](#)

**Guests:**

If you wish to bring along family members or friends, you may also register them by clicking on the 'Register Additional Guests' button below.

## Registering Cont.

1. Here the member has the option to **Register** for the event (click the **Register Me** button) or **Decline** the event (click the **Decline** button).

You are currently not registered for this event.

[See Who Else is Registered](#)

- If you have decided to register for the event then you will see some contact information for you to edit. You can edit the **email**, **phone** and **name tag** fields. Once everything looks okay click the **Confirm** button.

You can change your contact information, to register click on 'Confirm' button

<b>First Name:</b>	<input type="text" value="Mickey"/>
<b>Last Name:</b>	<input type="text" value="Jones"/>
<b>Email:</b>	<input type="text" value="mickey@example.com"/>
<b>Phone:</b>	<input type="text"/>
	<input type="button" value="Confirm"/> <input type="button" value="Cancel"/>

- If the member clicks on **Decline**, then their status will change to declined. Under the Register Me section the member will now have an **Undecline** button that they can click, should they change their mind. Pressing that button will un-decline the member's registration and set them back to undecided.

Register Me

You have currently declined this event. To change your attendance status, click Undecline. You will then be able to register.

[See Who Else is Registered](#)

- If you would like to register some guests for the event, click on the **Register Additional Guests** button.

Guests:

If you wish to bring along family members or friends, you may also register them by clicking on the 'Register Additional Guests' button below.

- A form appears. Please fill it out with the guest's information.

<b>First Name:</b>	<input type="text"/>	<b>Email:</b>	<input type="text"/>	<a href="#">Save</a>   <a href="#">Cancel</a>
<b>Last Name:</b>	<input type="text"/>	<b>Phone:</b>	<input type="text"/>	
<b>Tag Text:</b>	<input type="text"/>			

**First name:** Enter the first name of the guest. This is a required field.

**Last name:** Enter the last name of the guest. This is a required field.

**Name Tag:** Enter the information that you would like to be displayed on a Name Tag.

**Email:** Enter the guests email address to have them receive a confirmation email stating they are registered for the event.

**Phone:** Enter the phone number of the guest in case they need to be reached.

**Save:** This will save the guest registration details that you provided and will register the guest. The guest will then get an email that contains their confirmation number.

**Cancel:** This will disregard the changes that you made and will not register the guest.

**NOTE:** If you wish to edit the Guest details after they have been registered then click on the **Edit** (paper and pencil) icon. If you wish to unregister a guest, simply click on the **Unregister** (recycling bin) icon. If you unregister a guest they will receive an email letting them know they are no longer registered for the event.

Guests:	Confirmation No.	Comments	Actions
John Smith	694517		 

- To pay for the event online; the club must have the Online Payment & eCommerce module setup and configured. If they do, the member will have the ability to click on the **Proceed with Payment** button.

**Pay Online**

To see the payment options for this event click on the button below to proceed. You can still cancel at the next step.

You have a balance owing of \$10.00

**Proceed With Payment**

- This will take the member to the Credit Card information screen. Here the member would enter their information and click the **Submit** button to send in the payment. Once this is done the member would not owe anything else for the event. You are now paid and registered!

- Pay by Check:** Clicking this button will display a message to the person registering a message with the information how to pay by check/cheque.

Please make check/cheque payable to:

Send to:

Thank you for your prompt payment.

10. The event chair would then record the payment in the event once they receive the check.

**NOTE:** The **Event Chair** will have to go in and **Record Payment** for the member! See page 11 for more details.

## iv. Support & Training

Visit our **Support Center** at <http://clubrunner.helpserve.com> to access all resources available, including submitting a support ticket, searching the Knowledge Base, downloading helpful “how-to” documents and viewing on-demand demos. The following is a list of all the various resource guides available to you.

<p style="text-align: center;"><b><u>Knowledgebase</u></b></p> <p>This is where you will find access to hundreds of articles answering frequently asked questions on how to do virtually everything on ClubRunner.</p>	<p style="text-align: center;"><b><u>Downloads</u></b></p> <p>This area contains useful documents referenced within this guide, including the Member Cheatsheet, access rights matrix, presentation agenda, and more.</p>
<p style="text-align: center;"><b><u>On-Demand Videos</u></b></p> <p>For frequently asked questions on how to do certain things on ClubRunner, we have recorded video tutorials available for you to view.</p>	<p style="text-align: center;"><b><u>Webinar Training</u></b></p> <p>We hold several webinars every week on the various modules of ClubRunner. These are open to any member of your club, and we recommend that you send your board members to attend.</p>
<p style="text-align: center;"><b><u>Submit a Ticket</u></b></p> <p>For technical support, use our Support Center to submit a ticket, or send an email to <a href="mailto:support@clubrunner.ca">support@clubrunner.ca</a>. Our turnaround time for email tickets is 2 business days.</p>	<p style="text-align: center;"><b><u>Community</u></b></p> <p>Start a conversation with other ClubRunner customers on best practices, tips and tricks, feature enhancements and more. The discussion forum is a great place to learn how other customers are utilizing ClubRunner to manage their club website.</p>

For the latest ClubRunner updates, follow us on:

