

I. Introduction

1. General Overview

MyEventRunner makes the process of obtaining event registration easy. The tool simplifies the process of registering for an event and purchasing items. With MyEventRunner, a user can easily setup a registration form and maintain a track record of all the transactions related to the event.

MyEventRunner can simplify the task of organizing complex events or can be used as a regular tool to setup a standard function.

With MyEventRunner, simplicity in event organization is crucial. Organizers can create unlimited package options with varying price points, provide merchandise sales and other add-ons, communicate within five different languages and generate detailed reports on all data collected.

The screenshot shows the MyEventRunner web interface. At the top, there is a blue header with the MyEventRunner logo and navigation links for 'Sign Out' and 'Admin'. Below the header, a yellow banner displays the event title 'Football Tickets' and the date range 'From Nov 25, 2012 01:00 PM to Nov 25, 2012 11:00 PM'. The main content area is divided into a left sidebar and a central panel. The sidebar contains a 'View All My Events' link and several menu categories: 'Current Event' (Dashboard, Setup, Add Registration), 'Registrations' (View Registrations, View Attendees, View Payments, Prepare Name Tags), 'Communication' (Email Service), and 'Reports' (Confirmation Report, Confirmed Registration, By Questionnaire, By Comments). The central panel features a 'Welcome' message with instructions on how to use the system, followed by a numbered list of five steps. Below the instructions is a box titled 'ClubRunner Contacts & Resources' containing links to the Subscriber Community Portal, On Demand Video Tutorials, Webinar Training, eSupport Center, and contact support at support@clubrunner.ca. It also includes social media links for iLoveClubRunner and Twitter, and provides support hours: Monday - Friday 9 a.m. - 5 p.m. Eastern Time, Toll Free: 1-877-469-2582 / Option 2.

Who can create and Manage Events?

Clubs: A member must have minimum access rights of **Club Executive** (level 50).

Districts: A member must have the **MyEventRunner Administrator** Role to gain access to MyEventRunner.

2. My Event List

My Event List is an overview page listing the events created by event organizers. When an event is created and saved, the list will appear in chronological order. From this page, a user will have the ability to create, open, duplicate and remove an event.

Links and Functions

New Event: Allows the event organizer to create a new event.

Open: Will open the event created to allow the event organizer to apply changes.

Delete: This function will delete the event and remove it from the event list. *Note, you cannot delete the event if there are active registrations.*

Duplicate: This function will copy the details of the event (Packages, Add-Ons; minus the dates and registrations). You will see a new screen asking to confirm/define all relevant fields, including event name, code, and dates.

Go Back: This function will take you to the previous screen.

The screenshot shows the 'Event List' interface. At the top, there is a checkbox for 'Show Past Events' and a message: 'Your package allows you to create 100 event(s) per year.' A 'New Event' link is in the top right. Below is a table with the following data:

Event Name	Code	Event Starts	Reg. Starts	Reg. Ends	Status	
Football Tickets	C8602-0003	Nov 25, 2012	Oct 10, 2012	Nov 24, 2012	Draft	Open Delete Duplicate

Below the table, it says '1 upcoming event(s)'.

3. Getting Started

Setup

In order to utilize MyEventRunner, an event will need to be created. The following is a step by step guide on how to create a new event. From the Event List page, select the **New Event** Link. Once selected, you will be ready to start adding information for your new Event.

This screenshot shows the top portion of the 'Event List' page, including the 'Show Past Events' checkbox, the package limit message, and the 'New Event' link. The table headers are visible:

Event Name	Code	Event Starts	Reg. Starts	Reg. Ends	Status
------------	------	--------------	-------------	-----------	--------

Creating Your Event

Step 1: Enter Event Information

Please select the version of MyEventRunner for this event.
For more information on pricing and feature comparisons visit www.myeventrunner.com

Version : Pro (Upgrade Fee Applies) Lite (Limited Features)

Available in two versions, Lite and Pro, MyEventRunner gives you the power to collect public registrations and payments for your events. Wondering what the differences between each version are? Check out the features comparison chart below to find out!

	LITE	PRO
Design-Your-Own Registration Form Builder	✓	✓
Unlimited Add-Ons with Maximum Limit Option	✓	✓
Public registration form, Club Runner login optional	✓	✓
Disabling/Creating new packages and add-ons on the fly	✓	✓
Accept Credit Cards (Online Payments & eCommerce module required)	✓	✓
Balance Statements, Multiple Payments Tracking	✓	✓
Reports by Paid Status, Attendee, Registration, Package, Add-on		✓
Single or Couple Packages, Unlimited Group (Pricing) Categories		✓
Early Bird Pricing with Unlimited Milestone Dates		✓
Split Payments by Milestone Dates, by Fixed Amount or Percentage		✓
Payment by Check option, tracking payments		✓
Unlimited Questionnaires (drop downs, text, Yes/No selection)		✓
Payment by Check option, record payments received		✓
Custom instructions in confirmation email(e.g. hotel link)		✓
Maximum number of registration per event	Unlimited	Unlimited
Admin Area-Access for up to 5 event chairs	Free	Free
Cost per Registration*	\$0	\$1

Event Details

Step 1: Enter event information

Account: AccountClubRunner Kayako

Please select the version of MyEventRunner for this event.
For more information on pricing and feature comparisons visit www.myevenrunner.com

Version : Pro (Upgrade Fee Applies) Lite (Limited Features)

Event Name:

Code:

Currency:

Language: English French Spanish Russian Chinese Simplify

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

Event End Date and Time:
(For multi-day events)

Enable Form on this Date: Start of Registration (EST)

Disable Form on this Date: End of Registration (EST)

Links and Functions

Account: Field automatically filled in;

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

Code: Reference code to identify the event. Populates automatically but can be manually edited.

Currency: Select the currency to be used for payment. *This is a required field!*

Language: This function will translate fields to help users of a different language enter information with ease. More than one language can be selected. Default language selected is English. At least one language is required.

Event Start Date and Time: This is the starting date and time of the event. *Please note, the time is in Eastern Standard.*

Event End Date and Time: This is the ending date and time of the event. *Please note, the time is in Eastern Standard.*

Enable form on this date: Date the event will begin to appear on the site; this is the date that members can start to register for the event.

Disable Form on this Date: Date the event will no longer appear on the site; this is the date that the members will no longer be able to register for the event.

Allow ClubRunner member login: This allows the members to login and have the personal fields populate based on the membership information. (i.e. First Name, Last Name, Phone number, etc.)

Allow duplicate registrations: This allows a member to register for an event multiple times.

Allow user to edit registration: This gives the registered member the ability to make changes to their registration after they have already registered.

Publish registered attendees list: Will allow users on the site to view the user that will be attending the event.

Show on calendar: This will display the event on the homepage menu calendar option.

Show on home page: This will display the event in the Events homepage widget. The Event widget must be setup for the event to be displayed on the homepage.

Show in bulletin: This will display the event in the Events Bulletin widget. The Events Bulletin widget must be setup in the bulletin to be displayed on the bulletin.

	Status:
Allow ClubRunner member login:	<input checked="" type="checkbox"/>
Allow duplicate registrations:	<input checked="" type="checkbox"/>
Allow user to edit registration:	<input type="checkbox"/>
Publish registered attendees list:	<input type="checkbox"/>
Show on calendar:	<input type="checkbox"/>
Show on home page:	<input type="checkbox"/>
Show in bulletin:	<input type="checkbox"/>

Options for Pro events only

Number of registrants:	<input type="radio"/> double <input checked="" type="radio"/> single
Separate Group for Guest:	<input type="checkbox"/>
Hide all pricing and payment labels (select for free events or volunteer registrations):	<input type="checkbox"/>
Payable By Check:	<input type="checkbox"/>
Check Payment Instructions:	<input type="text" value="Please make check/ch"/>

Number of Registrants (single):

Indicates that only one person will register for the event.

Number of Registrants (double):

Indicates that two people will register for the event, i.e. Member + Guest.

Separate Group for Guest: Identifying and creating customized pricing for non-members of the club.

Hide all pricing and payment labels:

Typically setup for free events; this option will hide any pricing or payment labels.

Payable By Check: Indicates that user(s) can pay for the event by check.

Check Payment Instructions:

Instructions to the user indicating what they need to put on the check.

Save Button: After all the information is entered in fully, the **Save** button can be selected. You're your information has been successfully saved, you will see the following message:

Event saved successfully appear at the top of the page to confirm that the information has been saved. This will also reveal the events contacts section.

Events Contacts: This allows the user to setup a contact for the event that can answer email questions. More than one contact can be specified. Clicking on the **Add new Contact link** will direct you to the following form:

Is default contact: When checked, this will be the main contact for the event. When a contact is saved successfully, a confirmation message will appear under the specified contact. **Default Contact** Once completed, simply click on **save**.

Once a contact has been saved, the section will change to look like the image below. You will notice that the "add new contact" link has reappeared on the right side of the contact information to allow you to add more contacts.

Edit: Allows the event organizer to make changes to an added contact.

Delete: Removes an added contact.

Set Default: This command (when clicked) will change the default status between multiple contacts.

During user registration, the Event Contact(s) will show up at the bottom of the final payments screen.

Step 2: Design and Customize Your Form:

Within this section the event organizer can select between templates on how their registration form will appear on the site.

Large Multi-Day Event Package: This template is designed for complex events with flexible pricing. It allows different groups with several options. This option uses the following parameters:

- 2 Package types
- 2 Specified Add-ons
- 4 Questions to be answered by registrant

Step 2: Design and customize your form

Large Multi-Day Event Package [Select](#)
3 packages, 2 add-ons, 4 questions.
This template is designed for complex events with flexible pricing based on groups with several options. Includes add-ons and a questionnaire.

Simple Event Package – Sample One-Day District Assembly [Select](#) [Preview](#)
This template is designed for simple events that do not require a shopping cart for packages and add-ons, and consistent pricing for all registrants. Includes a questionnaire.

Public URL:
<http://www.crsadmin.com/EventPortal/Registrations/PublicFill/EventPublicFill.aspx?evtid=2e30332a-b3dc-43e6-a214-f6dc96976308>

[Save](#)

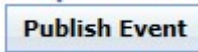
Step 3: Publish
[Publish Event](#)

Simple Event Package – Sample One-Day District Assembly: This template is designed for simple events that do not require an additional item and consistent pricing for all registrants. It does include a questionnaire.

Public URL: The link supplied is the address of the event being created. It can be used to preview the registration form. Please note that the site will not be viewed until the time specified as the start date.

Step 3: Publish Event

This button will apply the created form to the website. Also, note that public URL cannot be viewed until the website has been published. **NOTE:** Published events cannot be deleted. If you want to delete a published event you must go to Setup...(scroll down) Step 3: Publish and click the **Undo Publish** button.



4. Form Designer



The form designer section is a customizable section where an event organizer can apply changes to the look and content of the registration form. The section is a step by step process of the form.

Header: The event header is located at the top of the registration form. This area is used to edit the header. The top area displays a preview of the header. The lower area of this page lets you edit the header.

Height: This sets the height for the header in pixels.

Background Image: This sets the background for the header. Click the icon to select an image for the background. You can select an image or click Browse and Upload to upload a new image from your computer. Click the icon to remove the background.

Left Logo: This sets the left logo for the header. Click the icon to select an image for the logo. You can select an image or click Browse and Upload to upload a new image from your computer. Click the icon to remove the logo.

Right Logo: This sets the right logo for the header. Click the icon to select an image for the logo. You can select an image or click Browse and Upload to upload a new image from your computer. Click the icon to remove the logo.

Content: This sets the text on the header. Click the icon to open the online editor which will allow you to enter text, links and more into the header. To remove the text, please click on the icon and erase all of the text.

Upload images

Height: px

Background Image:

Left Logo:

Right Logo:



Content:

The width of the background image should be maximum 987px.
To preview the banner, go to Setup and click Public URL.

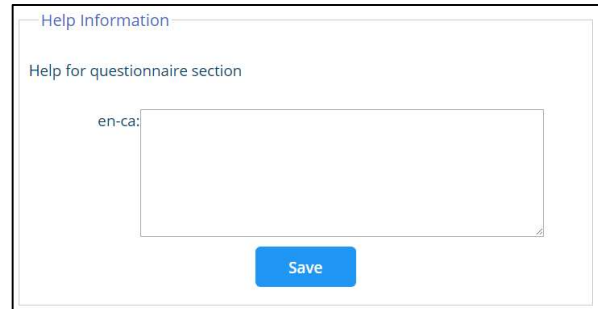
Attendee

Groups: The main use of attendee groups is to acknowledge a specified group of people that will be attending the event. Click the **add group** button to bring up the



window. Within this section the event organizer can enter in the group name and group code. When finished click the **save** button to apply the change or click **cancel** to close the window and not apply any changes. Within the list, the edit () icon can be used to make changes to the attendee group. The delete () icon can be used to remove the group added.

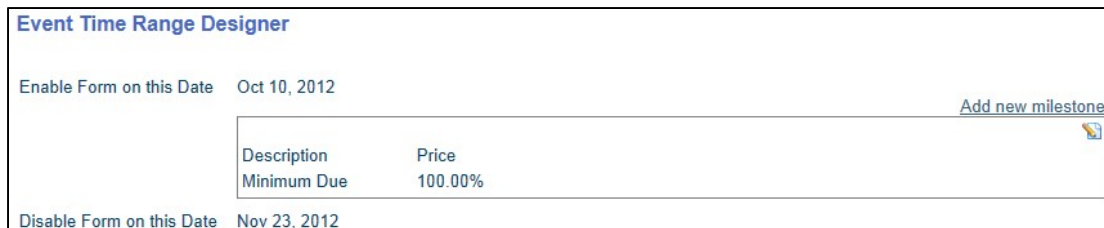
Help Information: In the various event sections (eg, *Attendee Groups, Packages, Questionnaire*) you can input Help information to assist the registrant. Type any Help text you'd like to convey to the registrant inside the "en-ca" box.




This Help information will display in a yellow box at the top of each associated section.



Time Ranges: The time ranges section is used to break up the full registration period into smaller periods. The purpose of this is to allow the event organizer to apply different fees for different periods of time. (i.e.: From Oct 10 to Oct 15, any registered guests will get 20% off early registration bonus.)





The edit () icon can be selected to add first milestone within the time ranges. The event organizer can add a **price by amount or percentage of an amount** to be paid for within the time



selected. Please note, that *percentage or amount entered* is the amount you are requesting. When completed click the **save** button to save the information added. Now, we can add the next milestone in which you are either introducing another promo price or returning the price back to its original amount. Click add new milestone to add this information. When completed your window should show the



information dates starting ending and discounts applied. Keep in mind that the Edit () icon is used to edit each milestone and the delete () icon is to remove it.

- Form Designer
- Header
- Attendee Groups
- Time Ranges
- Packages**

Packages: The packages section is used to setup specific rates for registrations. Please note that any discount applied within the time ranges section will be applied to the total amount entered in this section.

NOTE: Packages are not required for an event! Events can also be setup using only Add-Ons.



Registration Packages		Number of People Covered	Actions
 	Full Conference Registration - Single For a single registrant. Includes all meals for Friday and Saturday. Does not include golf or Thursday optional dinner.	1	 
 	Special Program for Spouses/Partners Partner program for spouses attending with main registrant.	1	 

To begin click the **Add New Packages** button. This will open up the package information window. Within this section the event organizer can enter in all the information needed for registration of the event.

Package Name
en-ca: _____

Description
en-ca: _____

Design HTML Preview Words: 0 Characters: 0

Set PST/State Tax _____ %

Set GST/Fed Tax _____ %

Max Registration Allowed _____ Leave blank for no limit

Package Code _____

Number of People Covered 1 ▾

	From Oct 10, 2012 to Oct 31, 2012	From Nov 1, 2012 to Nov 22, 2012
Members and Spouse	\$ 0.00	\$ 0.00
Club Presidents	\$ 0.00	\$ 0.00
Past District	\$ 0.00	\$ 0.00
Governors	\$ 0.00	\$ 0.00

Save Cancel

Set PST/State Tax _____ %

Set GST/Fed Tax _____ %

Max Registration Allowed _____ Leave blank for no limit

Package Code _____

Number of People Covered 1 ▾

Set PST/State Tax | Set GST/Fed Tax: This section is dependent on what state or province your event is located in. This section is enabled if taxes are needed to be applied to the packages. Click the checkbox to be able to enter a percentage value.

Max Registrations Allowed: Used to set a registration limit, this should be left blank to be unlimited.

Package Code: A manual code field that will be associated with the package.

Number of people covered: The number here represents how many individuals will be applied to one package.

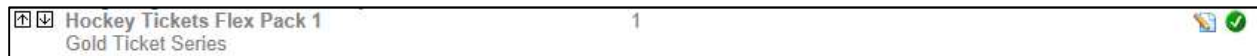
	From Oct 10, 2012 to Oct 31, 2012	From Nov 1, 2012 to Nov 22, 2012
Members and Spouse	\$ 175.00	\$ 225.00
Club Presidents	\$ 175.00	\$ 225.00
Past District Governors	\$ 175.00	\$ 225.00

Pricing: The lower section will have the attendee groups, and time ranges applied to this section. An event organizer can apply pricing based on the groups created and the time ranges setup. The amounts entered are the full amounts for the package despite the time range. Once the information is entered, click the **Save** button to save the package details or **Cancel** button to discard.

Enable / Disable: Within the list of packages; as soon as one person registers for the event, the Disable (🚫) symbol appears for the package(s) that was selected. This button will turn off the package, making it unavailable to new registering attendees.



To have the package be seen in your list, just click the Enable (✅) symbol.



- [Form Designer](#)
- [Header](#)
- [Attendee Groups](#)
- [Time Ranges](#)
- [Packages](#)
- [Add-Ons](#)

Add-Ons: The add-on section is used to create additional items to be included with the registration. These items can be anything. Within this section an Event Coordinator can apply prices to different items.

Event AddOn Designer

[Add New AddOn](#)

Optional Add-Ons	Code	Actions
<input type="checkbox"/> <input type="checkbox"/> Children 8 - 18 years old		
<input type="checkbox"/> <input type="checkbox"/> Optional Dinner on Thursday		
<input type="checkbox"/> <input type="checkbox"/> Extra tickets for Gala Dinner on Saturday		
<input type="checkbox"/> <input type="checkbox"/> Golf on Thursday afternoon - price per person		
<input type="checkbox"/> <input type="checkbox"/> DVD		

To start, click the **Add New AddOn** button. The window to enter add-on information will appear. Within this section an individual can enter the following options to their add-on.

Description
en-ca:

B *I* U abc **A** Font Name Size

Design HTML Preview Words: 0 Characters: 0

Code

Set PST/State Tax %

Set GST/Fed Tax %

Max Registration Allowed Leave blank for no limit

	From Oct 10, 2012 to Oct 31, 2012	From Nov 1, 2012 to Nov 22, 2012
Members and Spouse	\$ 0.00	\$ 0.00
Club Presidents	\$ 0.00	\$ 0.00
Past District Governors	\$ 0.00	\$ 0.00

Save Cancel

Code	<input type="text"/>
Set PST/State Tax	<input type="checkbox"/> <input type="text"/> %
Set GST/Fed Tax	<input type="checkbox"/> <input type="text"/> %
Max Registration Allowed	<input type="text"/> <small>Leave blank for no limit</small>


Code: A manual code field that will be associated with the Add-On.

Set PST/State Tax | Set GST/Fed Tax: This section is dependent on what state or province your event is located in. This section is enabled if taxes are needed to be applied to the add-ons.


Max Registrations allowed: Used to set a registration limit, this should be left blank to be unlimited.

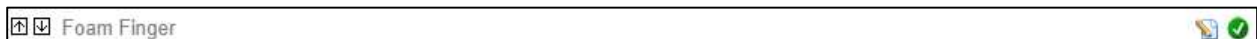
	From Oct 10, 2012 to Oct 31, 2012	From Nov 1, 2012 to Nov 22, 2012
Members and Spouse	\$ <input type="text" value="10"/>	\$ <input type="text" value="20"/>
Club Presidents	\$ <input type="text" value="10"/>	\$ <input type="text" value="20"/>
Past District Governors	\$ <input type="text" value="10"/>	\$ <input type="text" value="20"/>

Pricing: The lower section will have the attendee groups and time ranges applied to this section. An event organizer can apply pricing based on the groups created and the time ranges setup. The amounts entered are the full amounts for the add-on despite the time range. Once the information is entered, click the **Save** button to save the add-on details or **Cancel** button to discard.

Enable / Disable: Within the list of add-ons; as soon as one person registers for the event the Disable () symbol appears for the add-on(s) that was selected. This button will turn off the add-on, making it unavailable to new registering attendees.



To have the add-on be seen in your list, just click the Enable () symbol.



- [Form Designer](#)
- [Header](#)
- [Attendee Groups](#)
- [Time Ranges](#)
- [Packages](#)
- [Add-Ons](#)
- [Questionnaire](#)

Questionnaire: The Questionnaire appears after the registration form has been filled out. It can be used to ask additional questions related to the event.

Event Questionnaire Designer

[Add Question](#)

Question	Type	Actions
<input type="checkbox"/> <input type="checkbox"/> Are you a Past District Governor?	True/False	
<input type="checkbox"/> <input type="checkbox"/> Are you a current President?	True/False	
<input type="checkbox"/> <input type="checkbox"/> Please tell us if you or your partner/guest have any special requests or have any dietary restriction, so on.	True/False	
<input type="checkbox"/> <input type="checkbox"/> Do you have any dietary restrictions or special requests?	Short Text	

Indicates a required field

If you require additional questions to be added to the questionnaire, click the **Add Question** button, which will open a new page. When adding a new question the following items will need to be determined:

Event Question Designer

Edit Question

Type:

Required? Yes No

Question

en-ca

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

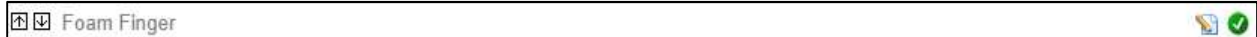
Type: This section is dependent on the type of question selected. The following is the list of question types:

- True/False:** Questions that require a true or false answer.
- Long Text:** Longer typed out answers
- Short Text:** Shorter typed out answers
- Selectable:** Question with selectable answers with in the form.
- Required:** A required field is requested information by the user. The attendee cannot continue on with the registration without that particular field being filled in. All required fields will be marked with the Required () icon.

Enable / Disable: Within the list of questions the Disable (🚫) icon appears. This button will disable the question, making it unavailable to new registering attendees.



To have the question seen in your list, just click the Enable (✅) icon.



- [Form Designer](#)
- [Header](#)
- [Attendee Groups](#)
- [Time Ranges](#)
- [Packages](#)
- [Add-Ons](#)
- [Questionnaire](#)
- [Standard Questionnaire](#)

Standard Questionnaire: The Standard Questionnaire is the registration form. This section will automatically be filled by default information.

Event Standard Questionnaire Designer

			Add Question
Question	Type	Actions	
🔍 📄 📄 First Name		🚫	
🔍 📄 📄 Last Name		🚫	
🔍 📄 📄 Badge Name		🚫	
🔍 📄 📄 Email		🚫	
🔍 📄 📄 Club Name		🚫	
🔍 📄 📄 Preferred Phone		🚫	
🔍 📄 📄 Secondary Phone		🚫	
🔍 📄 📄 Address 1		🚫	
🔍 📄 📄 Address 2		🚫	
🔍 📄 📄 City		🚫	
🔍 📄 📄 Zip/Postal Code		🚫	
🔍 📄 📄 Country		🚫	
🔍 📄 📄 State/Province		🚫	

Enable / Disable: Within the list of questions the Disable (🚫) icon appears. This button will turn off the Questions, making it unavailable to attendees. To have the Questions be seen in your list, simply, click the Enable (✅) symbol.

If you require additional information to be added to the standard questionnaire, click the **Add Question** button, which will open a new page. When adding a new question the following items will need to be determined:

Type: This section is dependent on the type of question selected. The following is the list of question types:

- True/False:** Questions that require a true or false answer.
- Long Text:** longer typed out answers
- Short Text:** Shorter typed out answers
- Selectable:** Question with selectable answers with in the form.

Required: A required field is requested information by the user, the attendee cannot continue on with the registration without that particular field being filled in. All required fields will be marked with the Required (Ⓜ) icon.

Question: Enter the question you would like to ask the attendee.

Once all the information is entered, click on the **Save** button to save the question to the event or **Cancel** button to discard changes.

- [Form Designer](#)
- [Header](#)
- [Attendee Groups](#)
- [Time Ranges](#)
- [Packages](#)
- [Add-Ons](#)
- [Questionnaire](#)
- [Standard Questionnaire](#)
- [Payment](#)

Payment: Within this section, the event organizer can setup an online payment service and/or information regarding payment by cheque.

Event Payment Designer

Please select one of following payment methods for this event:

- No payment account specified
- Sage Payment Solutions: Sage Test Payment Account (978985210861)
- BeanStream Payment Solution: Beanstream Test Merchant Account (200610000)
- Payable By Cheque

Selecting a payment method: Within the payment section an event organizer can select a payment source for all credit card transactions:

Sage Payments Solutions: Sage payment solutions are used strictly for customers located within the United States.

BeanStream Payment Solution: BeanStream Payment solutions are used strictly for customers located within Canada.

Payable by Cheque: When enabled the following template will automatically appear:

Please make check payable to:
Send to:
Thank you for your prompt payment.

The Event Organizer can enter all the necessary information needed for payment by Cheque. Once the information entered, click the **Save** button or **Cancel** button to discard.

Step 5: Current Event

[Current Event Dashboard](#)
[Setup](#)
[Add Registration](#)

Dashboard: The event dashboard shows a quick summary of packages and add-ons that attendees have registered for. The event organizer can use this chart to determine:

- Paid
- Not Paid
- The Total registered

Event Dashboard

There are 1 people registered (1 paid, 0 not paid)

# Registered	Paid	Not Paid	Total
Full Conference Registration - Single	0	0	0
Special Program for Spouses/Partners	0	0	0
Saturday Only Registration	0	0	0
Hockey Tickets Flex Pack 1	1	0	1
Children 8 - 18 years old	0	0	0
Optional Dinner on Thursday	0	0	0
Extra tickets for Gala Dinner on Saturday	0	0	0
Golf on Thursday afternoon - price per person	0	0	0
DVD	0	0	0
Foam Finger	1	0	1

Clicking on the number will take you to the **Event Registration Attendees Report** with the specific details from where you clicked from (ie. Package/Add-on + Paid or not Paid) to provide the event organizer with a detailed list.

Event Dashboard

There are 1 people registered (1 paid, 0 not paid)

# Registered	Paid	Not Paid	Total
Hockey Tickets Flex Pack 1	1	0	1

Event Registration Attendees Report

Selection Criteria

Payment Status: All Paid Unpaid

Package/Add-on: Hockey Tickets Flex Pack 1

Attendees Per Page: 25

Reg # ▲	Name	Reg Date	Actions
160688	Double, Ron	Oct 15 2012	Open

Total Attendee(s): 1

[Export To Excel](#)

[Current Event](#)
[Dashboard](#)
[Setup](#)
[Add Registration](#)

Add Registration: Within this section the event organizer can register a club member, or register an attendee outside of the Club membership.

Step 1: A member can be looked up by what club he or she is a part of **or** by typing in the first letters of the first and last name. Once that information has been entered click the **next** button.

Step 1:
Select the Club to which the member belongs

OR

Type the first few letters of member's name
Last Name:
OR
First Name:

Next >>

Step 2: A member can be selected from a drop down list. The users within this section are from the results of Step 1. Once the member is selected click the **Continue** button to move on to add registration.

Step 2:
Select the member's name from the list below

Continue

Add New Registration: If you are registering an attendee that exists outside your club/district/zone then click the **Add New Registration** link to move on to add registration.

Select Member

If you are registering a member that exists in the database, you can start by searching for their member profile below. Otherwise click [Add New Registration](#) to register someone outside your club/district/zone.

Enter a Registration ID: The event organizer can enter the members Registration ID from another event (that they are registered for) to have the members information populate the registration fields. Once you press the **copy** button you will be able to move on to add registration.

OR enter a Registration ID from another event and click Copy:

Add Registration - Form

The **Add Registration** window will load up with the member’s information already populated (unless “Add New Registration” was clicked, in which case none of the fields will automatically populate. The rest of the form will have to be filled out manually.

Your Partner/Guest Information: If the attendee is bringing a guest that is not a member of a club, the partner’s information will need to be filled out within this section. If no guest/partner will join the individual then the section should be left empty.

Double Registration Setup

Single Registration Setup

After the form is completed you may click **Select Options** link to continue.

Event Options - Forms

Event Options: Within this section the attendee can select the package(s) that have been created by the event organizer. If a package is not selectable there could be two reasons:

- (i) That specific package has been disabled
- (ii) the package has reached its limit for registrations.

EVENT OPTIONS

Please select one of the following packages per person registered:

Registration Packages ? Help	From Oct 10, 2012 to Oct 31, 2012	From Nov 1, 2012 to Nov 22, 2012	Selections	Subtotals
Full Conference Registration - Single For a single registrant. Includes all meals for Friday and Saturday. Does not include golf or Thursday optional dinner.	\$0.00	\$0.00	<input type="checkbox"/> Ron	\$0.00
Special Program for Spouses/Partners Partner program for spouses attending with main registrant. Includes all meals on Fri and Sat. Thursday optional dinner not included. Golf not included.	\$0.00	\$0.00	<input type="checkbox"/> Ron	\$0.00
Saturday Only Registration Single registration for all Saturday meals.	\$0.00	\$0.00	<input type="checkbox"/> Ron	\$0.00
Hockey Tickets Flex Pack 1 Gold Ticket Series	\$175.00	\$225.00	<input type="checkbox"/> Ron	\$0.00

Please select any of the add-ons below by indicating the quantity per person registered:

Optional Add-Ons	From Oct 10, 2012 to Oct 31, 2012	From Nov 1, 2012 to Nov 22, 2012	Selection	Subtotals
Children 8 - 18 years old	\$0.00	\$0.00	<input type="text" value="0"/> Ron	\$0.00
Optional Dinner on Thursday	\$0.00	\$0.00	<input type="text" value="0"/> Ron	\$0.00
Extra tickets for Gala Dinner on Saturday	\$0.00	\$0.00	<input type="text" value="0"/> Ron	\$0.00
Golf on Thursday afternoon - price per person	\$0.00	\$0.00	<input type="text" value="0"/> Ron	\$0.00
DVD	\$0.00	\$0.00	<input type="text" value="0"/> Ron	\$0.00
Foam Finger	\$10.00	\$20.00	<input type="text" value="0"/> Ron	\$0.00

Total: \$0.00

[← Back](#) [Answer Questions →](#)

Optional Add-on: These are additional products or services that have been setup by the event organizer. When a product is selected here it will be added to the Attendees total.

After the form is completed, you may click on the **Answer Questions** button to continue.

Questionnaire - Form

Questionnaire: The questionnaire section is a list of question that has been added by the event organizer. This section is used to obtain information needed for the event. After this section has been completed, you may click the **Continue to Payment Selection** to continue.

Payment - Form

Payment: The Attendee registering for the event online will have two options: (i) Pay By Credit Card or (ii) Pay by Check. The Attendee would simply click on the payment method button to continue with the payment.

Save Registration Without Payment: The attendee has the option to register for the event but not yet make a payment. When clicking this button, they will see the following which confirms their registration: **REGISTRATION SUCCESSFULLY SAVED.**

Registration Summary: This section lists all the packages and add-ons selected by the user. The **Print Button** can be used print out the form.

Event Name: ClubRunner Hockey Day
Confirmation No: 160688

Registrant Information

Your Information

First Name	Ron
Last Name	Double
Price group	Members and Spouse
	123 Any St.
	Mississauga
	ON
	M5S 1A5
Country	Canada
Preferred phone	
Secondary phone	
Email	

Package Selected Hockey Tickets Flex Pack 1

Package Price	\$175.00
PST/State Tax	\$0.00
GST/Fed Tax	\$0.00
Sub Total	\$175.00

Registration Payment Detail:

Sub Total:	\$175.00
PST/State Tax:	\$0.00
GST/Fed Tax:	\$0.00
Grand Total:	\$175.00

If you have any questions regarding your registration please contact:

John Doe, Event Chair
Telephone: 555-5555
Address: 123 Anywhere ST
Email: johndoe@clubrunner.ca

Testy Tester,
Telephone:
Address:
Email: ast@hotmail.com

Registrations

- [Registrations](#)
- [View Registrations](#)
- [View Attendees](#)
- [View Payments](#)
- [Prepare Name Tags](#)

This section is used as an overview of all registrants. Within this section, the following options can be customized to better organize a complete report:

Registration List

Search

Search by First / Last name or Reg #

Filter Results

Payment Status All Paid Unpaid

Registration Status: ▼

Registrations Per Page ▼ [REMIND ALL](#) [Export To Excel](#)

Reg # ▲	Name	Spouse/Partner	Reg Date	Reg Total	Payments	Balance Owing	Actions
160688	Double, Ron		Oct 15 2012	175.00	0.00	175.00	Reminder Open Delete

Total Attendee(s): 1

Legend

	Registration has been Completed & Paid
	Registration has a Balance Owing
	Registration has a Credit (Overpaid)
	Registration has been Cancelled (May require a refund or payment)

Search: Allows the Event organizer to search the list of registered individuals by first name, last name or Registration number.

Search

Search by First / Last name or Reg #

Filter Results: This function provides a list of registrants based on whether there status is Paid or Unpaid.

Filter Results

Payment Status All Paid Unpaid

Registration Status: ▼

[REMIND ALL](#) [Export To Excel](#)
Actions
[Reminder](#) [Open](#) [Delete](#)

Remind All: This will send an email to all undecided invitees.

Export to Excel: This option will load all registrant data within the page to an excel spreadsheet.

Reminder: This option will send a statement of the balance owing to the attendees via email.

Open: This link will lead to an overview page of the attendee’s information. Within this section the event organizer can make changes to the information made by attendee.

Delete: Selecting this option will remove the user registration from the system.

NOTE: *The **balance owing** must be the whole amount or the delete link will be disabled! If the attendee made a partial or full payment then they will need to be refunded before there registration can be deleted.*

Legend:

Legend	
	Registration has been Completed & Paid
	Registration has a Balance Owing
	Registration has a Credit (Overpaid)
	Registration has been Cancelled (May require a refund or payment)

NOTE: *If a member or public tries to register for the event with an invalid credit card number, it will **save the registration with no payment**. The person will appear in this report as **balance owing**.*

[Registrations](#)
[View Registrations](#)
[View Attendees](#)
[View Payments](#)
[Prepare Name Tags](#)

When this option is selected the user will bring up the **Event Registration Attendees Report**. This report will bring up a complete list of:

- Users attending the Event
- Status of Paid or Unpaid
- Packages attendees have purchased

Event Registration Attendees Report

Selection Criteria

Payment Status All Paid Unpaid

Package/Add-on Show All ▼

Attendees Per Page 25 ▼

[Export To Excel](#)

Reg # ▲	Name	Reg Date	Actions
160688	Double, Ron	Oct 15 2012	Open

Total Attendee(s): 1

Once all criteria have been entered the user can click **generate** to pull up the list.

Export to Excel: This option will load all registrant data within the page to an excel spreadsheet.

- [Registrations](#)
- [View Registrations](#)
- [View Attendees](#)
- [View Payments](#)
- [Prepare Name Tags](#)

This report allows the event organizer to filter by registrants' payment methods. (i.e. only see attendees that have paid by cash.)

Event Payments Report

Search

Search by First / Last name or Reg #

Filter Results

Payment Type All Online Check Cash Refund

[Export To Excel](#)

Payment Date	Registrant Name	Payment Type	Reg # ▲	Reference No.	Amount
Oct 15 2012	Double, Ron	Cash Payment	160688	5v5vt5g5g	175.00
Total Payment(s): 1					Total Amount: 175.00

Search: Allows the event organizer to search the list of registered individuals by first name, last name or Registration number. The result will take you to the attendees' registration.

Search

Search by First / Last name or Reg #

Filter Results: This function filters attendees by payment type. Filter Options are:

- All
- Online
- Check
- Cash
- Refund.

Simply click the Filter button to populate table.

Export to Excel: This option will load all registrant data within the page to an excel spreadsheet.

- [Registrations](#)
- [View Registrations](#)
- [View Attendees](#)
- [View Payments](#)
- [Prepare Name Tags](#)

Create name tags for all registered attendees and guests. Please select the payment process and tag types, and then click the **generate** button.

Prepare 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 Status 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

Show Theme Logo

Generate

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 you need to select whether you want the **Badge Type** or the **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. If you want the Club theme logo to be displayed on the name tag as well then check the box on.

Show Theme Logo

4. Now click the Generate button to produce the name tag report:

Generate



Sample Name Tag

**Communication
Email Service**

When email services link has been selected the **event email list** will appear. Within this section the Event Organizer can compose a message to notify Registrants of any updates pertaining to the event. Click on **Compose new message** link.

Event Email List			
			Show All Emails Compose new message
Date Last Sent	Subject	Owner	Actions
There are no emails.			

Step 1: Select the recipients of this message by clicking on the group name to expand, then select from the list of people.

<p>☐ Attendees</p> <ul style="list-style-type: none"> <input type="checkbox"/> All Attendees Show (0) <input type="checkbox"/> Paid Attendees Show (0) <input type="checkbox"/> Unpaid Attendees Show (0) <hr/> <p>☐ Packages</p> <ul style="list-style-type: none"> <input type="checkbox"/> Full Conference Registration - Single Show (0) <input type="checkbox"/> Special Program for Spouses/Partners Show (0) <input type="checkbox"/> Saturday Only Registration Show (0) <input type="checkbox"/> Hockey Tickets Flex Pack 1 Show (0) <hr/> <p>☐ Add-Ons</p> <ul style="list-style-type: none"> <input type="checkbox"/> Children 8 - 18 years old Show (0) <input type="checkbox"/> Optional Dinner on Thursday Show (0) <input type="checkbox"/> Extra tickets for Gala Dinner on Saturday Show (0) <input type="checkbox"/> Golf on Thursday afternoon - price per person Show (0) <input type="checkbox"/> DVD Show (0) <input type="checkbox"/> Foam Finger Show (0) 	<p>Attendees: These are the people that have registered for the event.</p> <hr/> <p>Packages: Email attendees by a specific package within the event.</p> <hr/> <p>Add-Ons: Show attendees that have selected a specific add-on.</p>
--	---

Step 2: Enter your email subject in the subject field.

Step 3: Enter the message in the editor screen. Within the editor you have the ability to change font, change font size, bold, underline, etc.

Finally, you have the option to upload attachments to your email. If you want to attach a file for the recipients then expand the attachment section and click on browse in order to select a file to attach.

Note: Total file size for upload attachments cannot exceed 3 MB.

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

Attachment [Total file size for uploaded attachments cannot exceed 3MB] ☰

Step 4: Choose your email options and send. Now select how you want to send the email.

<input type="button" value="Send"/>	Send: Will send the email to the selected recipients.
<input type="button" value="Save as Draft"/>	Save as Draft: This will save the email and the recipients as a draft and will not send out the email.
<input type="button" value="Send Test Email To Myself Only"/>	<p>Send Test Email to Myself Only: This will send an email only to the user clicking this button. The email configuration will be saved as a Draft.</p> <p>NOTE: When clicking this button, all of your recipients will be cleared out and you will have to select them manually again.</p>

- Reports**
- Confirmation Report**
- Confirmed Registration
- By Questionnaire
- By Comments

The confirmation report is a report based on the registration and packages that have been ordered. Within this section the event organizer can pull up a complete list of attendees. The report can be filtered by the status of the attendees. Simply select the registration status and click on generate.

Event Reports

Note: This report is being generated using new software as part of our testing. Please note that you may experience some delay in generating the report. Kindly send us your feedback to support@clubrunner.ca.

Select Registration Status Paid Not Paid All **Generate**

« < 1 of 1 > »
Export to the selected format
Export:

ClubRunner Kayako Date: Oct 15, 2012

Event: ClubRunner Hockey Day Page 1: 1

Confirmation Report

Ron Double 160688	
Package: Hockey Tickets Flex Pack 1	175.00

Export: This report can be exported out to PDF, CSV, Excel 97-2003, Rich Text Format, TIFF, & Web Archive.

- Reports**
- Confirmation Report**
- Confirmed Registration
- By Questionnaire
- By Comments

The confirmation report is a report based on completed registration forms. Within this section the event organizer can pull up a complete list of attendees that have completed the registration form. The report can be filtered by the status of the attendees. Simply click on the registration status and click on generate.

Export: This report can be exported out to PDF, CSV, Excel 97-2003, Rich Text Format, TIFF, & Web Archive.

- Reports
- Confirmation Report
- Confirmed Registration
- By Questionnaire
- By Comments

The questionnaire report is a report based on completed questionnaire. Within this section the event organizer can pull up a complete list of attendees that have completed the questionnaire form. Simply click on the registration status and click on generate.

Export: This report can be exported out to PDF, CSV, Excel 97-2003, Rich Text Format, TIFF, & Web Archive.

- Reports
- Confirmation Report
- Confirmed Registration
- By Questionnaire
- By Comments

The Comments report is a report based on added comments of the attendee. Within this section the event organizer can pull up a complete list of comments that have been added by the attendee.

Event Reports

Note: This report is being generated using new software as part of our testing. Please note that you may experience some delay in generating the report. Kindly send us your feedback to support@clubrunner.ca.

Select Registration Status: Paid Not Paid All **Generate**

1 of 1 | Export to the selected format | Export:

ClubRunner Kayako Date Prepared: Oct 15, 2012 12:31:42

Event: ClubRunner Hockey Day Page 1 of 1

Registration by Comments

Who is your favourite Club and why?		
Ron Double	ClubRunner is the best.	(160688)

Count: 1

Choose Questions

Select All

Who is your favourite Club and why?

NOTE: Comments will only appear if a Questionnaire question type is **Long Text!**

Export: This report can be exported out to PDF, CSV, Excel 97-2003, Rich Text Format, TIFF, & Web Archive.

II. 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;"><u>Knowledgebase</u></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;"><u>Downloads</u></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;"><u>On-Demand Videos</u></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;"><u>Webinar Training</u></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;"><u>Submit a Ticket</u></p> <p>For technical support, use our Support Center to submit a ticket, or send an email to support@clubrunner.ca. Our turnaround time for email tickets is 2 business days.</p>	<p style="text-align: center;"><u>Community</u></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:

