

Unification - Events

2016 - Summer Edition

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Overview

The Unified Platform allows Clubs to manage their Events seamlessly across the (back) Office, Axis-Website, and POS application; ensuring Administration, Members, and the Dining Room have the tools they need to set up, register, and manage the Club's events.

Use Case(s)

A Club may wish to host a Father's Day Brunch in one of their dining rooms and allow their Members to register for the event on-line. The Club utilizes the Clubessential Office Product, the Axis Website product, and has the POS fully implemented in their Dining areas. In addition to allowing the Members to register on-line, the Club is interested in assisting Members who call-in or walk-up with their registration. Additionally, on the day of the event, the Club would like the Dining Room to have integrated visibility into the Event registrants, and be able to easily convert the registrations into POS tickets they can then charge to their Members. The Unified Suite provides the Club with the ability to meet their goals.

Office

To effectively create an Event that integrates throughout the Unified platform, begin in Office.

Event Items

An item must exist for every price level associated with an Event.

For example, if there are two pricing levels to the Father's Day Brunch,



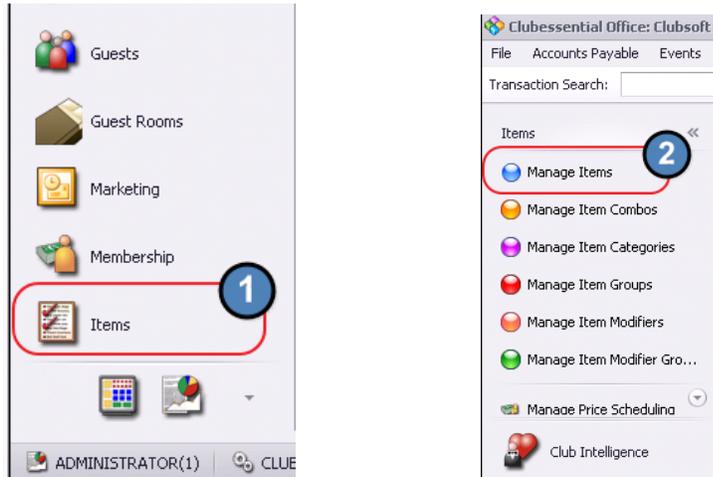
Two items must exist within Office to reflect this.

- (1) Adult Brunch - \$20
- (2) Child Brunch - \$15

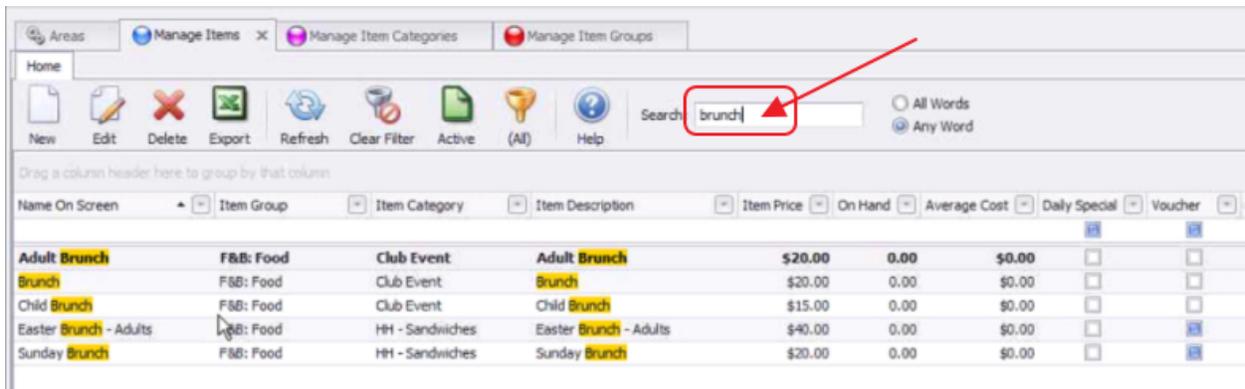
Ensure Event Items Exist

To ensure the proper Items exist, navigate to the following:

- 1) Click on "Items" Module
- 2) Click on "Manage Items"



Perform search for Items. In this example, enter "brunch" to return Items containing brunch.



Ensure both Items (in this example, Adult Brunch and Child Brunch) exist. If they do not, set them up.



Note Category for Event Items

Next, note the category that holds the Items. Information from Office (pertaining to the Event Items and Event Prices) will sync with website based on Item Category settings. In this example, Item Category is "Club Event."

Name On Screen	Item Group	Item Category	Item Description	Item Price	On Hand	Average Cost	Daily Special	Voucher
Adult Brunch	F&B: Food	Club Event	Adult Brunch	\$20.00	0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>
Brunch	F&B: Food	Club Event	Brunch	\$20.00	0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>
Child Brunch	F&B: Food	Club Event	Child Brunch	\$15.00	0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>
Easter Brunch - Adults	F&B: Food	HH - Sandwiches	Easter Brunch - Adults	\$40.00	0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>
Sunday Brunch	F&B: Food	HH - Sandwiches	Sunday Brunch	\$20.00	0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>

Note Group for Category Containing Event Items

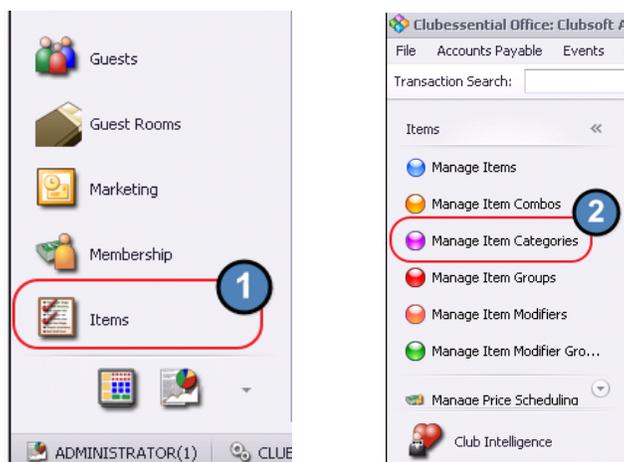
Then, note the Item Group that holds the Category that contains the Event Items. Will refer back to this later in the process. In this example, Item Group is "F&B: Food."

Name On Screen	Item Group	Item Category	Item Description	Item Price	On Hand	Average Cost	Daily Special	Voucher
Adult Brunch	F&B: Food	Club Event	Adult Brunch	\$20.00	0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>
Brunch	F&B: Food	Club Event	Brunch	\$20.00	0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>
Child Brunch	F&B: Food	Club Event	Child Brunch	\$15.00	0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>
Easter Brunch - Adults	F&B: Food	HH - Sandwiches	Easter Brunch - Adults	\$40.00	0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>
Sunday Brunch	F&B: Food	HH - Sandwiches	Sunday Brunch	\$20.00	0.00	\$0.00	<input type="checkbox"/>	<input type="checkbox"/>

Event Category

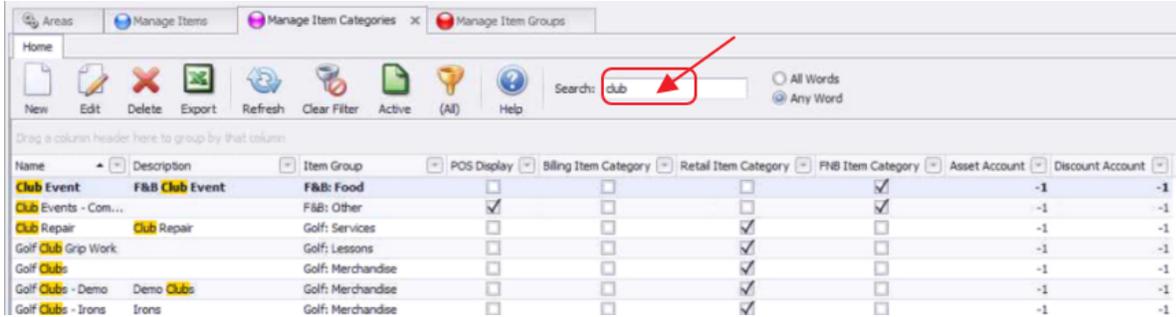
Next, navigate to the appropriate category to review/edit setup and ensure category is set up properly to sync with Axis Website product.

- 1) Click on "Items" Module
- 2) Click on "Manage Item Categories"

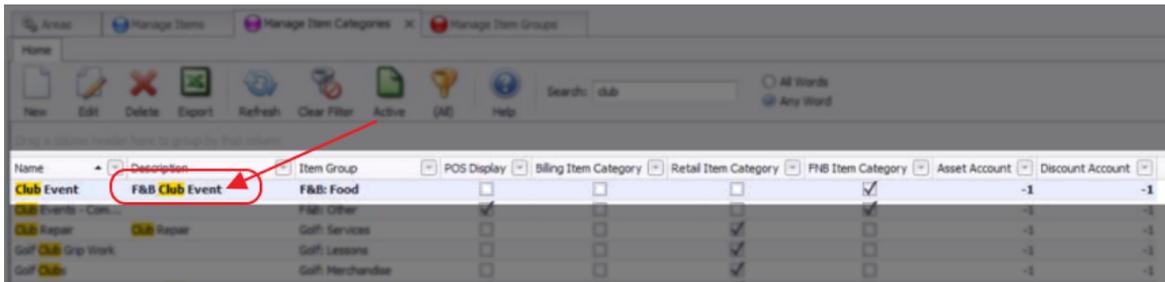


Review/Edit Category Setup

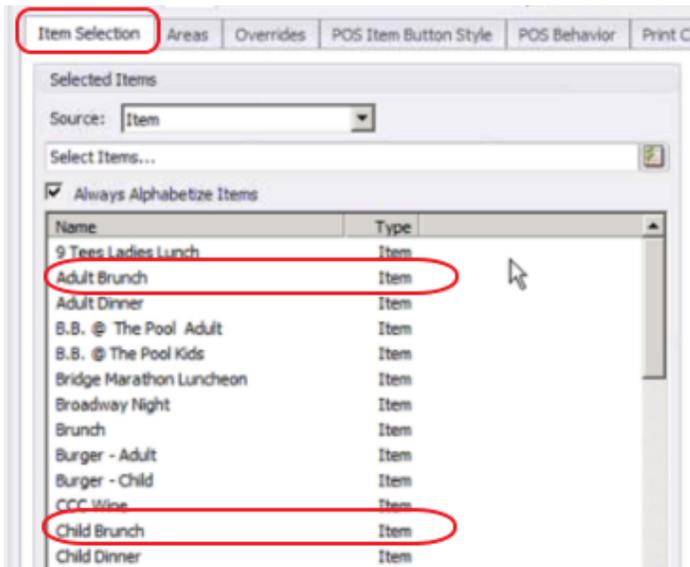
Perform search for Category. In this example, "Club Event" is the Category associated with the Brunch Items.



Once Category is identified, click on Category to review/edit Item Category.

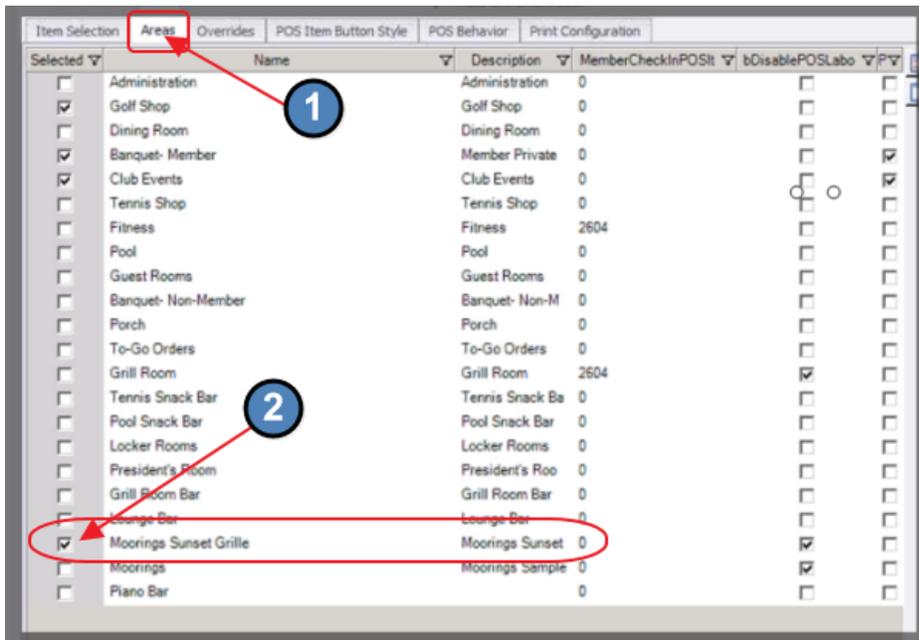


Note: Event Items will appear in listing on the Item Selection tab.



Next, navigate to the "Areas" tab, and ensure the Area of the Event is selected.

In this example, the Brunch will take place in the Moorings Sunset Grille.



After updating, click "Save and Close."

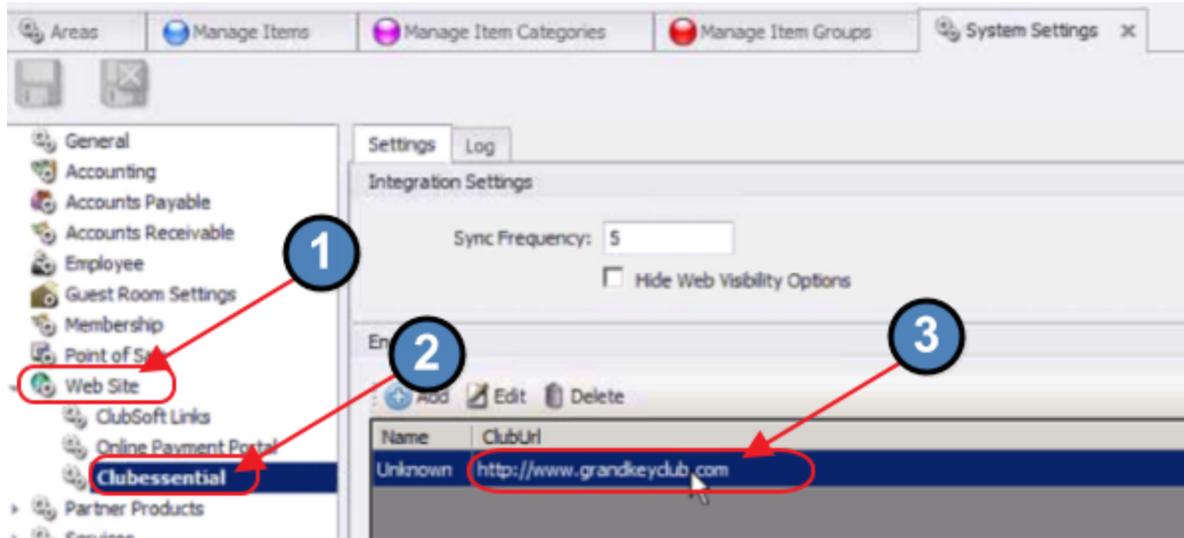


Sync Data to Axis-Website

In order for the Event data (associated Event Items and related Pricing) to sync to the Axis Website product, click on "System", and then "System Settings," as shown below.



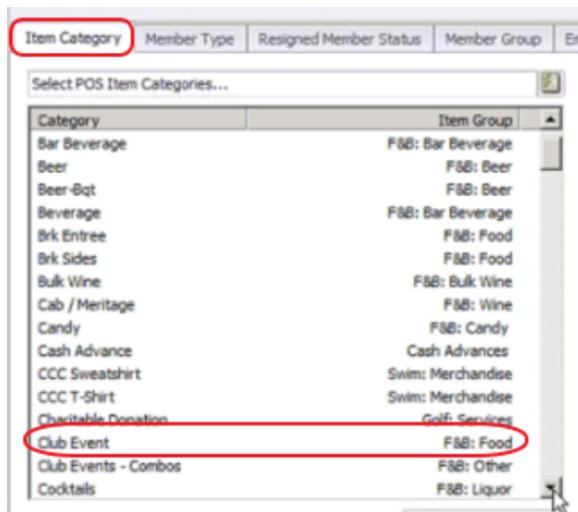
On the left side of the screen, navigate to Website, Clubessential, and then double-click the Club Url as shown below to launch the Endpoint Editor.



Review Item Categories Already Set to Sync

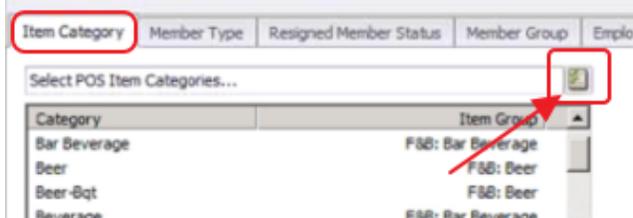
On the Item Category tab, ensure Category attached to Event is set to sync. If it is in the listing on the Item Category tab, it is already set to sync to the Axis-Website product.

In this example, category, "Club Event" in the "F&B:Food" Group is in the listing, and therefore is set to sync.

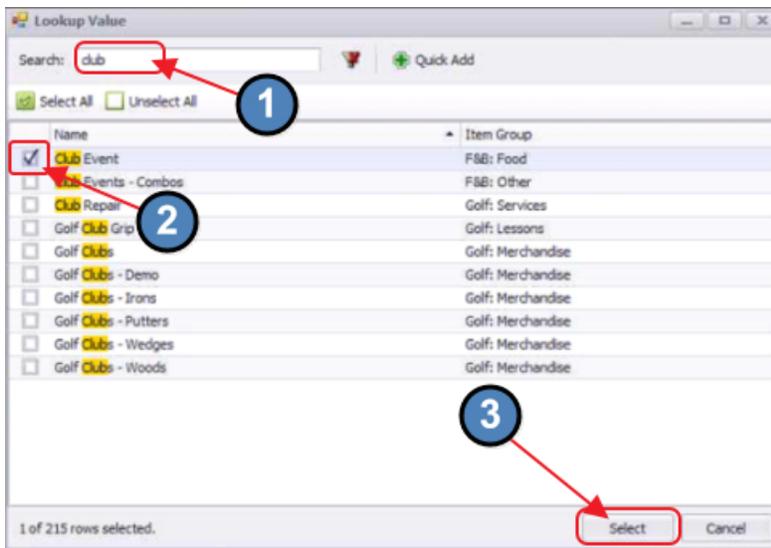


Add Category to Sync

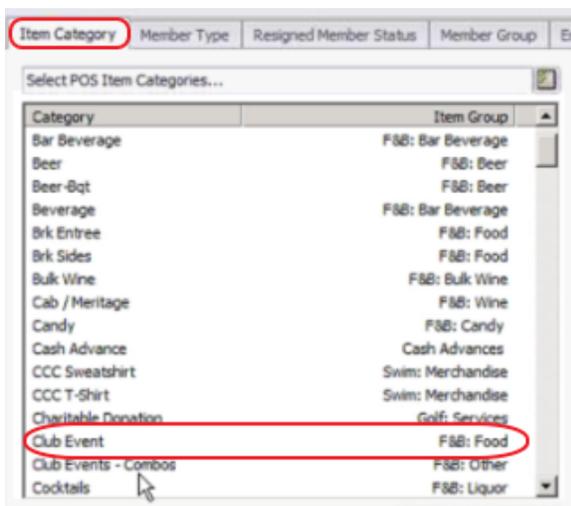
To add a Category to the listing of Categories set to sync to the Axis-Website product, click on the button shown below on the Item Category tab.



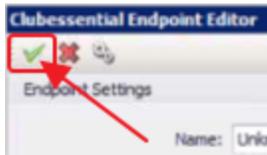
Next, find the Category by performing a search, select the category, and click, "Select."



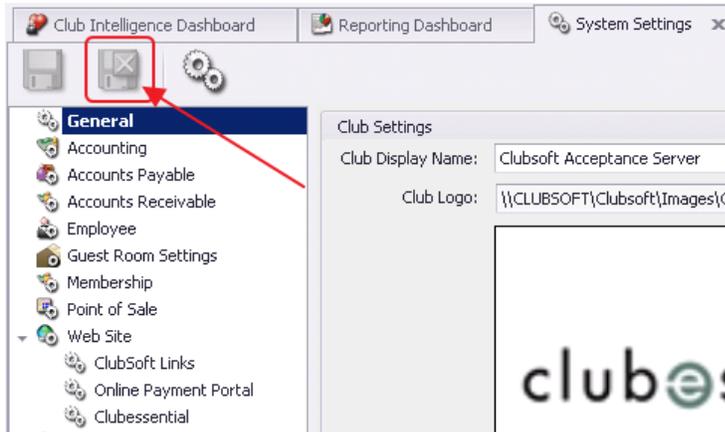
Category will then appear in the Item Category list.



When edits are complete, click the “Accept Changes” button at the top of the Endpoint Editor screen.



Then, click Save and Close on the System Settings tab.



Axis-Website

Once the Office tasks have been done to ensure Items, Pricing, and Categories are properly set, proceed to the Axis-Website product to build the Event, and handle Registration.

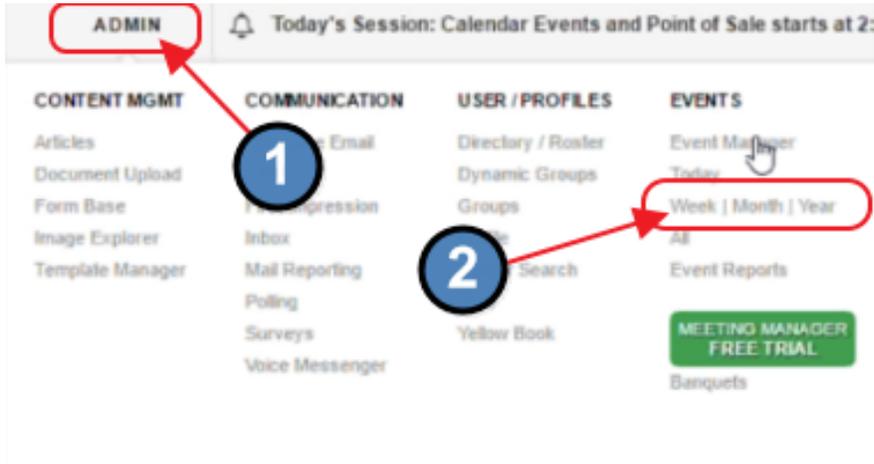
Build Event (as an Admin)

Navigate to Club Calendar

Option 1: Click on “My Club”, and “Club Calendar”

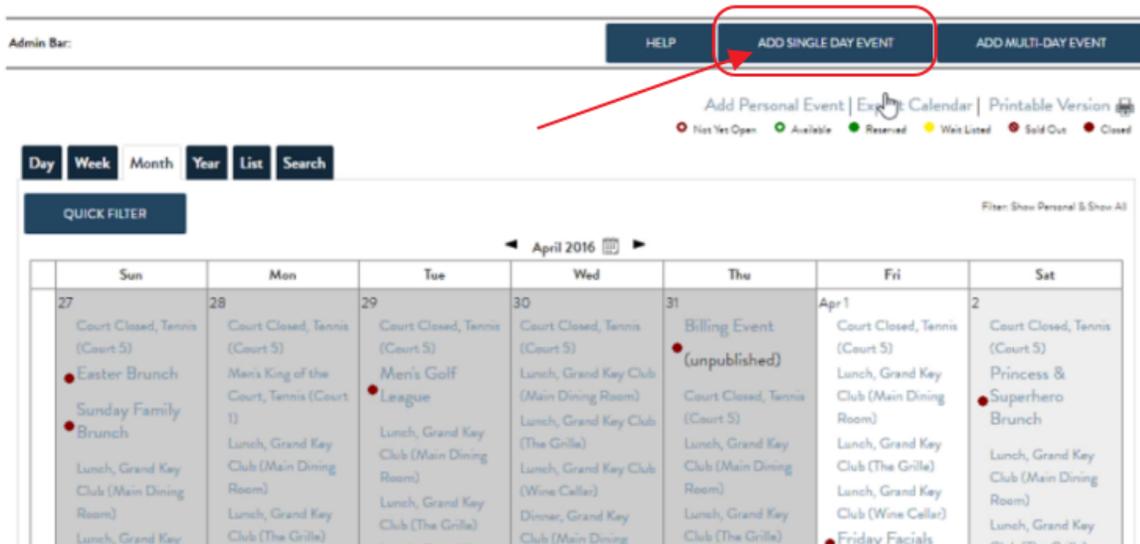


Option 2: Go to Admin Toolbar, and select, "Week/Month/Year" option under the Events column.



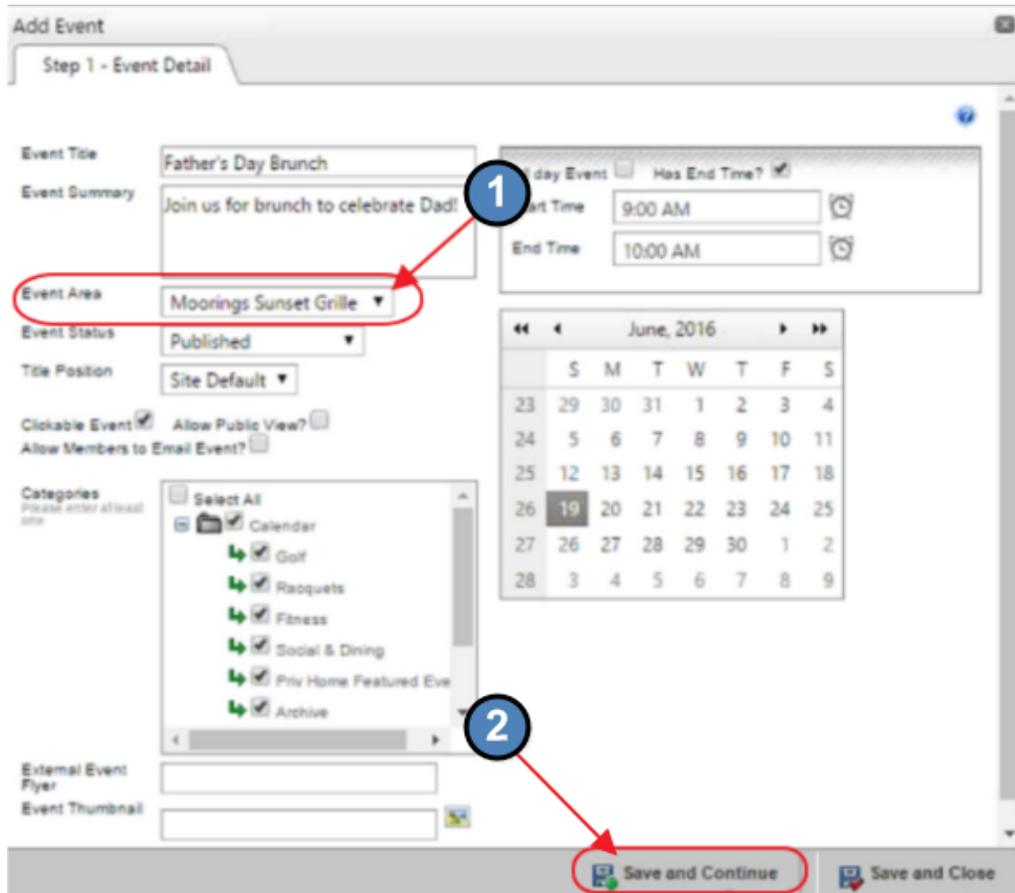
Click to Add Event

CALENDAR

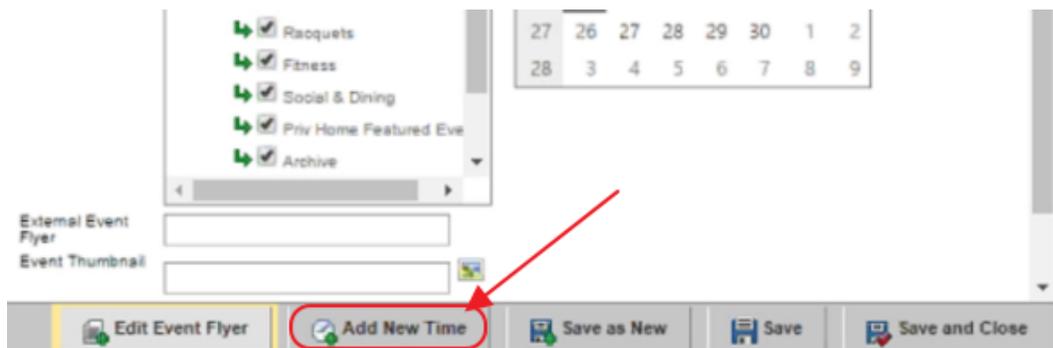


Complete Event Detail Tab

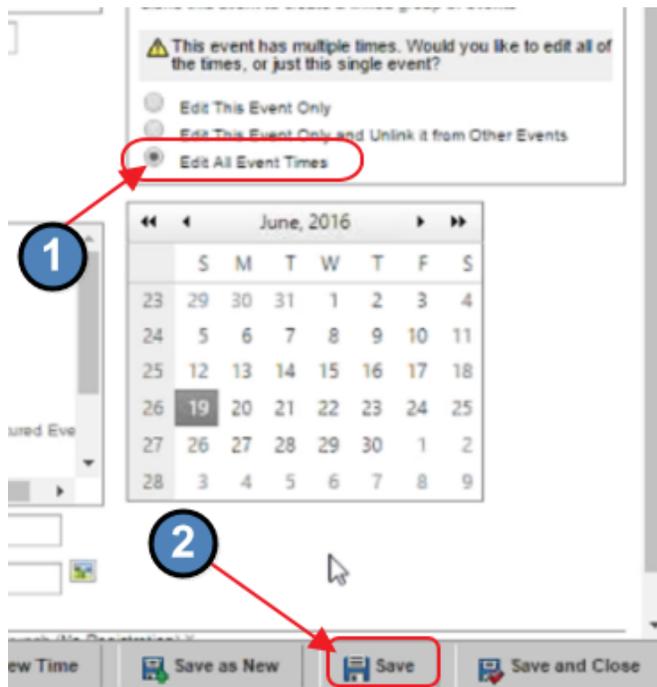
Complete the Event Details, and click, "Save and Continue." Note that the Event Area selected in the Event Details screen (highlighted below) should equal the Area selected in the Category Settings (within Office). Click Save and Continue.



To add more than one seating to the event, choose, "Add New Time" from the bottom options, and repeat adding details with second seating times. Add additional times as necessary.

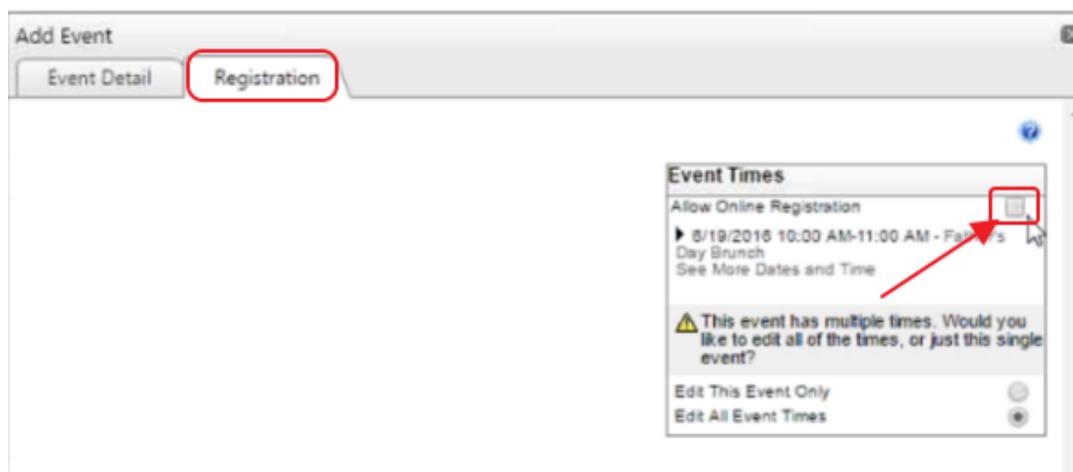


Once additional times are added, ensure the “Edit All Event Times” option is selected to define remaining Event settings for all Event times. Then, click, “Save.”

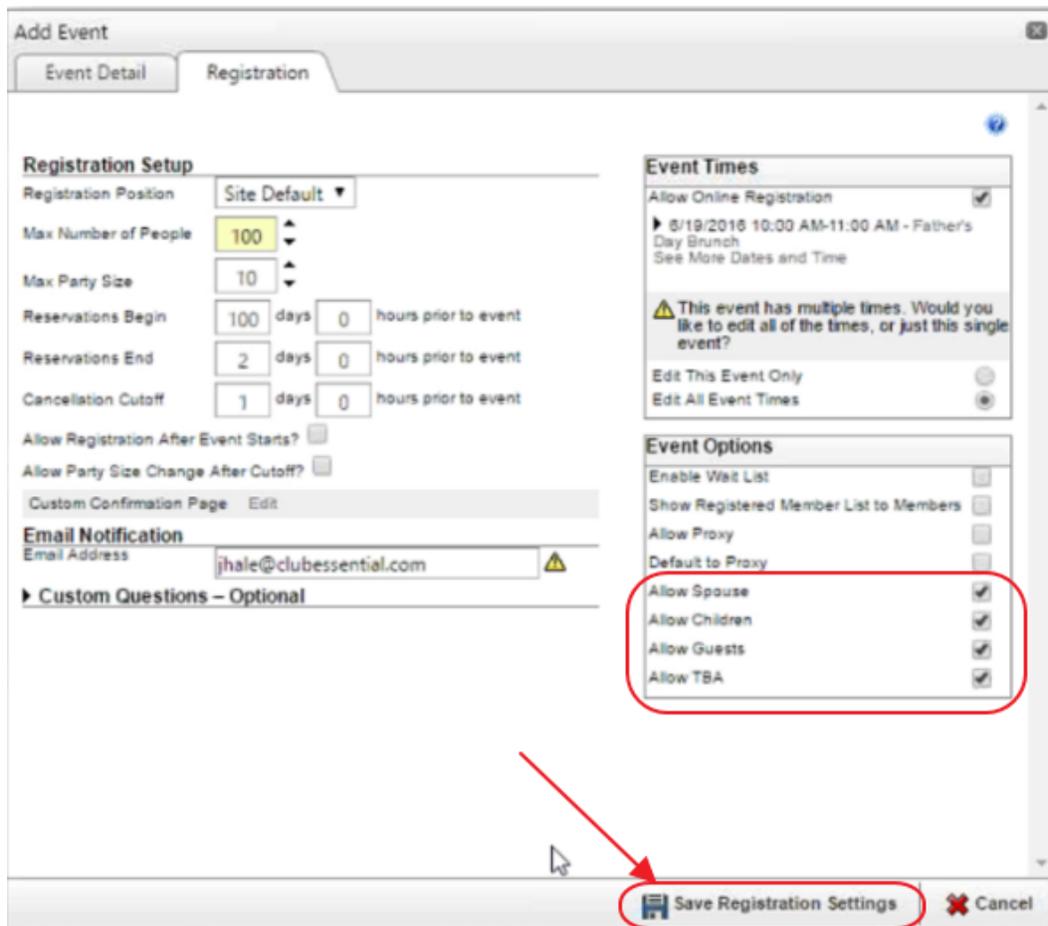


Complete Registration Tab

Next, navigate to the “Registration” tab. Check the box that says, “Allow Online Registration,” to ensure Members can register for the event online.

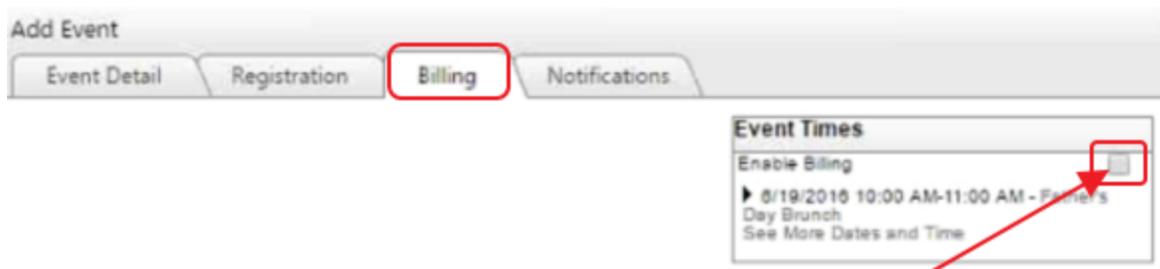


Once the box is checked, additional fields will appear. Populate Registration Setup details, Notifications, and Event Options as appropriate. Then, click “Save Registration Settings.” For this example, the Allow Spouse, Children, Guests, and TBA (to be announced attendees) options were enabled.

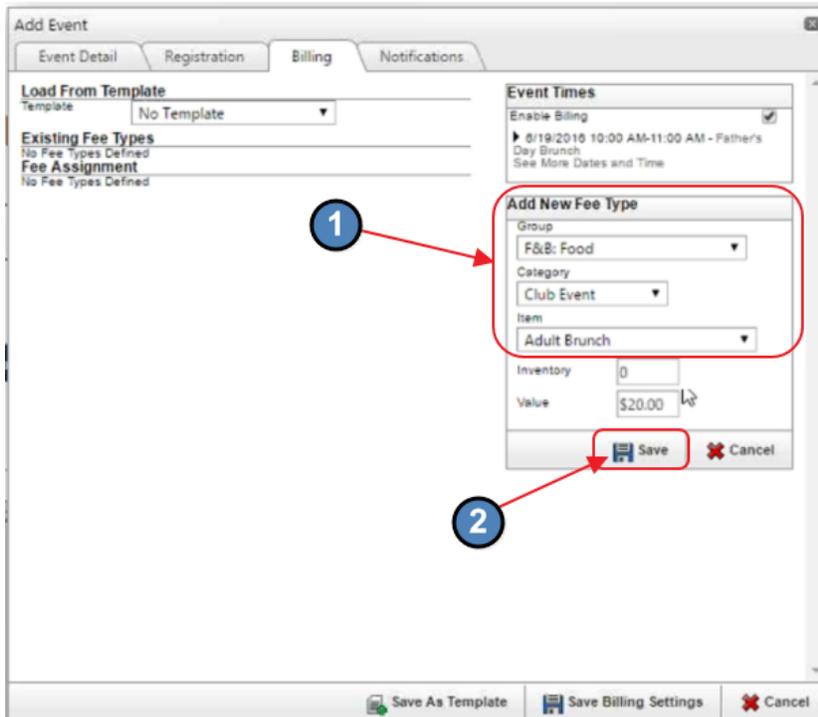


Complete Billing Tab

Once Registration tab is saved, a new tab, “Billing” will appear. This tab contains the link to the Items related to the Event set up in the back Office. Select the “Enable Billing” box to open Items that are available for linking to the Event.

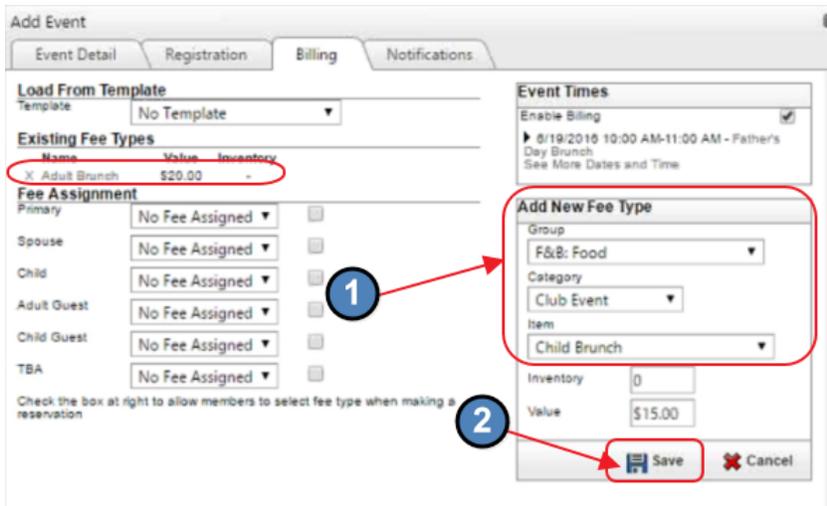


Populate the new fields that appear. This is where it will be helpful to have noted the Group that held the Event Item's Category. Select appropriate Group, Category, and Item, and then, click, "Save". For this example, the Adult Brunch is the first fee type to be added. Add Fee Types for all pricing levels of the Event.

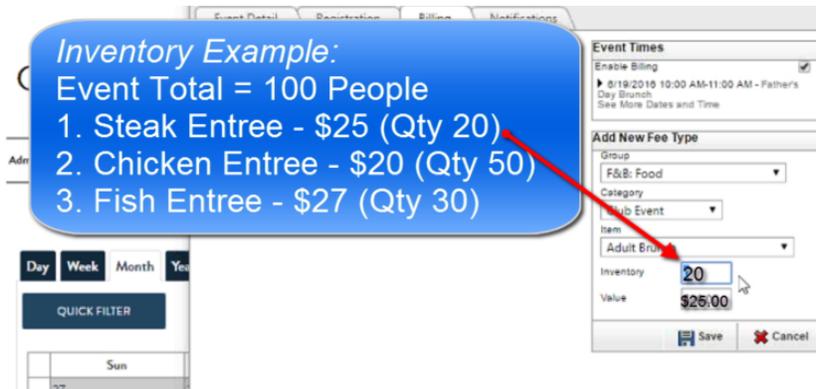


Note: The Value field in the Website will auto-populate based on Office data. Therefore, if the Event price needs changed, go into Office and change it, and it will then flow over to the Website.

Once Saved, Fee Type added will be shown (Adult Brunch). Next, repeat the above step for second fee type. In this example, "Child Brunch," would be the second fee type.

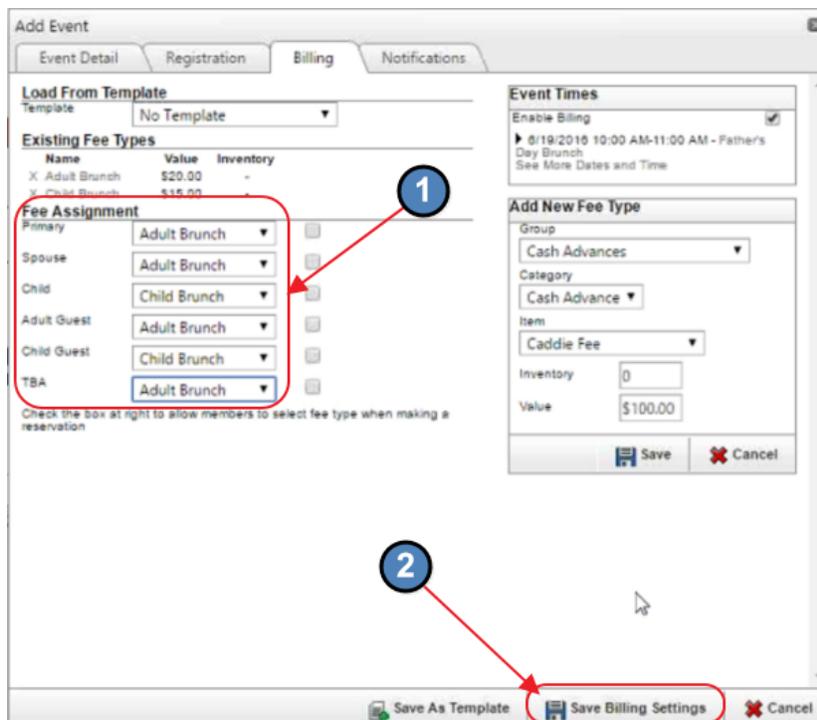


The "Inventory" feature would not be appropriate in the Father's Day Brunch example; however, may be appropriate when an Event has a certain number of seats, multiple entrees, and limited quantities of each entree. Once the Inventory runs out, the entree no longer appears on the registration for Member selection.

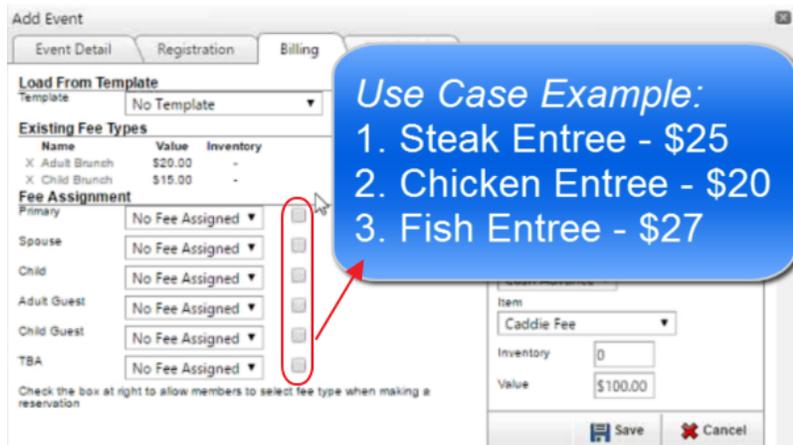


In the example above, once (20) Steak Entrees were chosen by registrants, only the Chicken Entree and Fish Entree would then appear for selection.

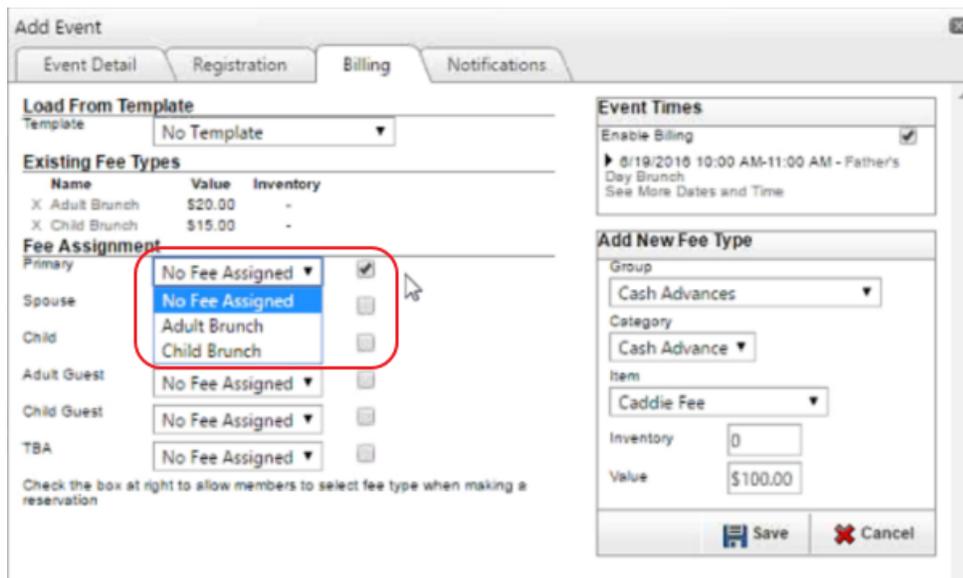
Once existing fee types have been established, assign the fees appropriately. Options available in the drop-down listing will be the existing fee types available for assignment. Once complete, click, "Save Billing Settings."



Note: The following boxes may be checked to designate that the Users may select their Fee Assignment. For example, this would be useful in Events that have different priced Entrees, from which a Member could choose.



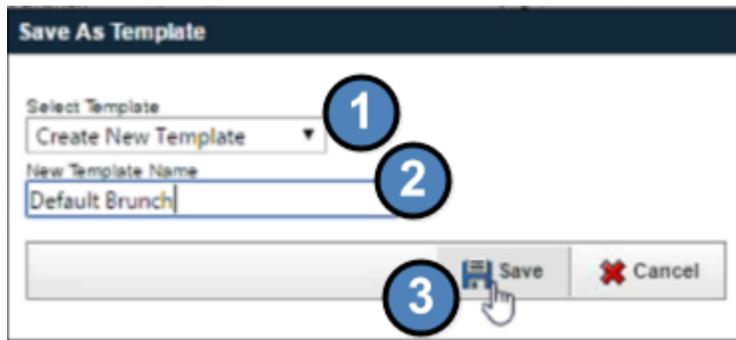
If checked, the options such as Steak Entree, Chicken Entree, and Fish Entree would appear in the drop-down (instead of Adult Brunch or Child Brunch).



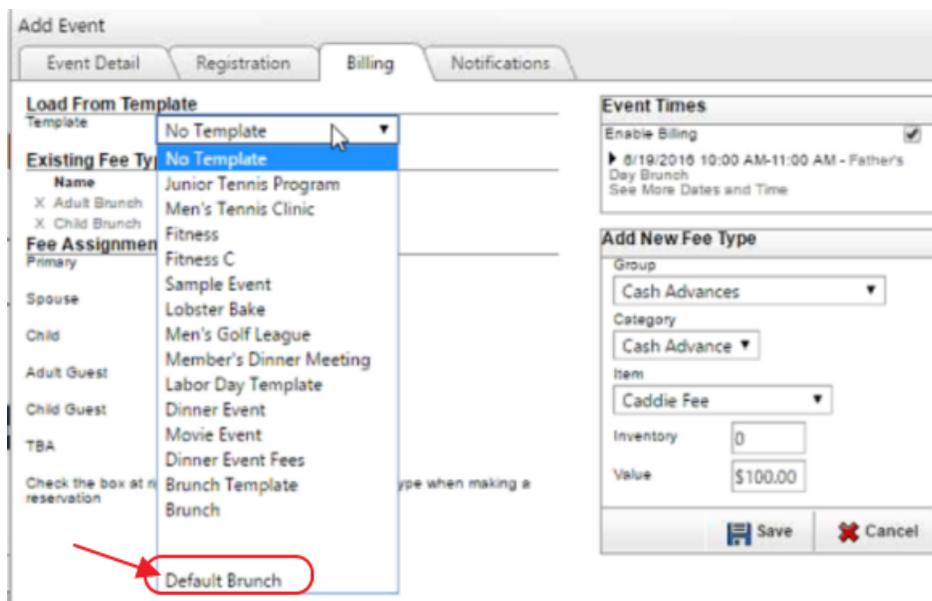
Additionally, if this fee structure is something that will be repeated in the future, the “Save As Template” option may be utilized instead of the “Save Billing Settings” option. For instance, if future brunches will have Adult Brunch price of \$20, and Child Brunch price of \$15, this would be useful to establish as a template.



When prompted, select, "Create New Template", name the template, and click, "Save."



The template would then be available in the "Load from Template" drop-down list for future reference. After clicking the "Enable Billing" option, and selecting the Default Brunch template from the drop-down menu, the remaining info on the screen (Fee Types and Fee Assignments) would populate.

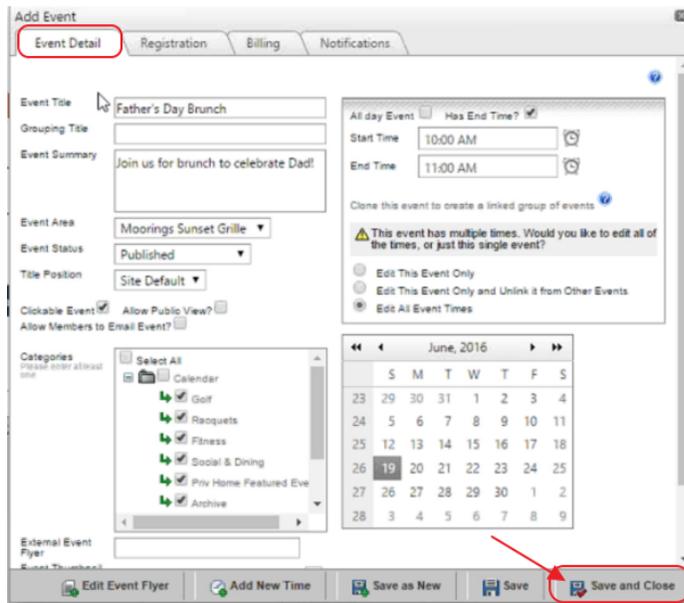


Once info auto-populated, choose "Save Billing Settings," to proceed.

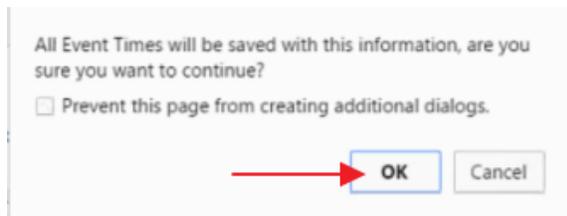


Save and Close Event

Once “Billing” tab is complete, return to “Event Detail” tab, and click, “Save and Close.”



Click, “OK,” to confirm.



Register (as a Member)

Navigate to Club Calendar

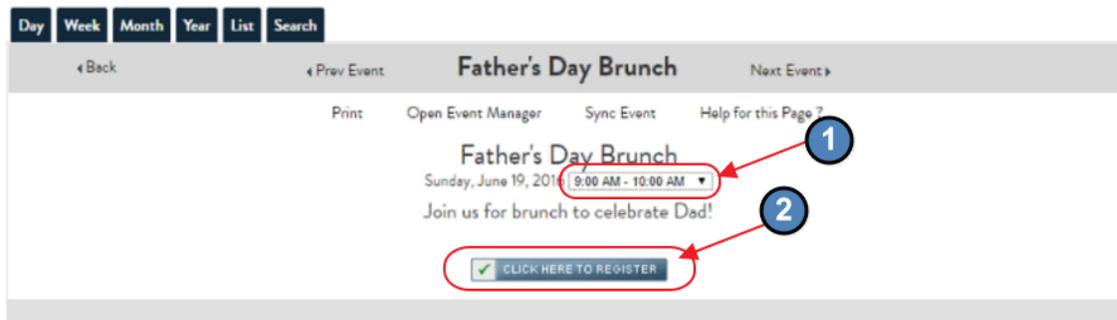


Find/Select Event

(Court 5)	(Court 5) Men's King of the Court, Tennis (Court 1)	(Court 5) Tennis Club	(Court 5)	(Court 5) Junior Golf Club	(Court 5) Friday Facials Half-Price Golf Clinic Lobster Bake Grand Key Style Lobster Bake Grand Key Style
19 Court Closed, Tennis (Court 5) Father's Day Brunch	20 Court Closed, Tennis (Court 5) Men's King of the Court, Tennis (Court 1)	21 Court Closed, Tennis (Court 5) Tennis Club	22 Court Closed, Tennis (Court 5)	23 Court Closed, Tennis (Court 5) Junior Golf Club	24 Court Closed, Tennis (Court 5) Friday Facials Half-Price Golf Clinic Couple's Night Lobster Bake Grand Key Style Lobster Bake Grand Key Style
26	27	28	29	30	Jul 1

Register for the Event

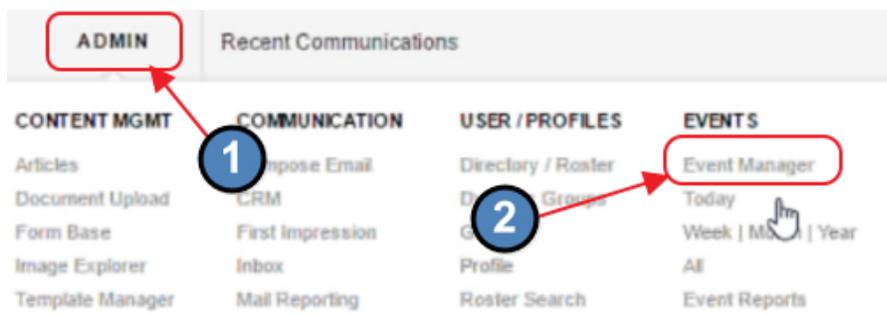
Member can select available seatings, and "Click Here to Register."



Help Members Register (as an Admin)

Navigate to Event Manager

From the Admin toolbar, select, "Event Manager," under the Events Column.



Event Manager will launch.

EVENT MANAGER

Filters

Date Range: to

Event Title: Member Name, Email, or #

Status: Registration Allowed:

Categories: All

Columns: Status Registration Allowed Registration Numbers Type Categories

[Click here to Perform Action\(s\)](#) [Custom Reports](#) | [Export Event Listing](#) | [Export All Guests](#) | [Print](#) | [Help](#)

<input type="checkbox"/> Title	Adults	Children	Total	Allowed	Date ^
<input type="checkbox"/> test	0	0	0	100	4/28/2016 9:30 AM-10:30 AM
<input type="checkbox"/> test	0	0	0	100	4/28/2016 10:30 AM-11:30 AM
<input type="checkbox"/> Junior Golf Club	2	1	3	100	4/28/2016 2:00 PM-3:30 PM

Select Event

Scroll to find the appropriate event.

<input type="checkbox"/> Lobster Bake Grand Key Style	0	0	0	100	6/17/2016 6:00 PM
<input type="checkbox"/> Lobster Bake Grand Key Style	0	0	0	100	6/17/2016 6:00 PM
<input type="checkbox"/> Lobster Bake Grand Key Style	0	0	0	200	6/17/2016 6:00 PM
<input type="checkbox"/> Father's Day Brunch	0	0	0	100	6/19/2016 9:00 AM-10:00 AM
<input type="checkbox"/> Father's Day Brunch	0	0	0	100	6/19/2016 10:00 AM-11:00 AM
<input type="checkbox"/> Tennis Club	0	0	0	50	6/21/2016 5:30 PM-7:00 PM
<input type="checkbox"/> Junior Golf Club	0	0	0	100	6/23/2016 2:00 PM-3:30 PM

Note: When there is more than one seating for an event, they will appear as separate line items.

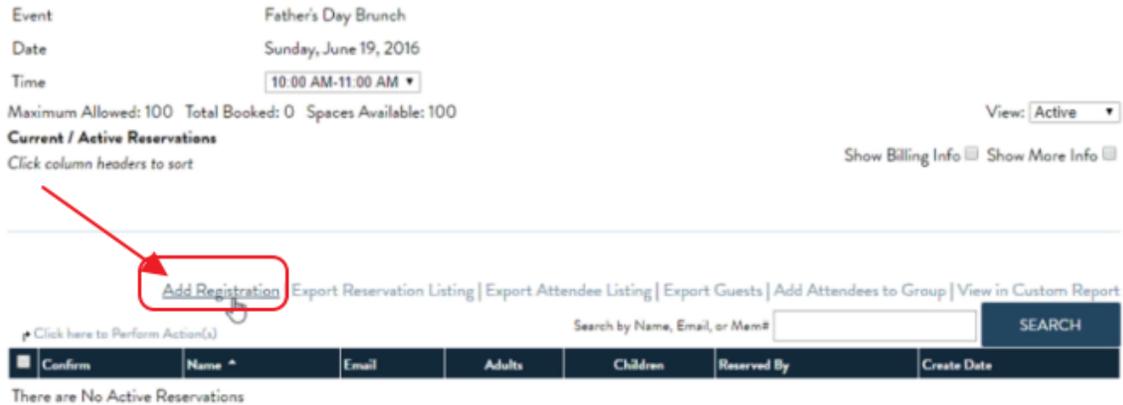
Select the appropriate seating to launch Admin Registration window.

<input type="checkbox"/> Father's Day Brunch	0	0	0	100	6/19/2016 9:00 AM-10:00 AM
<input type="checkbox"/> Father's Day Brunch	0	0	0	100	6/19/2016 10:00 AM-11:00 AM
<input type="checkbox"/> Tennis Club	0	0	0	50	6/21/2016 5:30 PM-7:00 PM

In the example below, Club Admin will help a Member register his party for the 10:00am seating of the Father's Day Brunch.

Add Registration

Click, "Add Registration."



Event: Father's Day Brunch
Date: Sunday, June 19, 2016
Time: 10:00 AM-11:00 AM
Maximum Allowed: 100 Total Booked: 0 Spaces Available: 100
View: Active
Current / Active Reservations
Click column headers to sort
Show Billing Info Show More Info

[Add Registration](#) | [Export Reservation Listing](#) | [Export Attendee Listing](#) | [Export Guests](#) | [Add Attendees to Group](#) | [View in Custom Report](#)

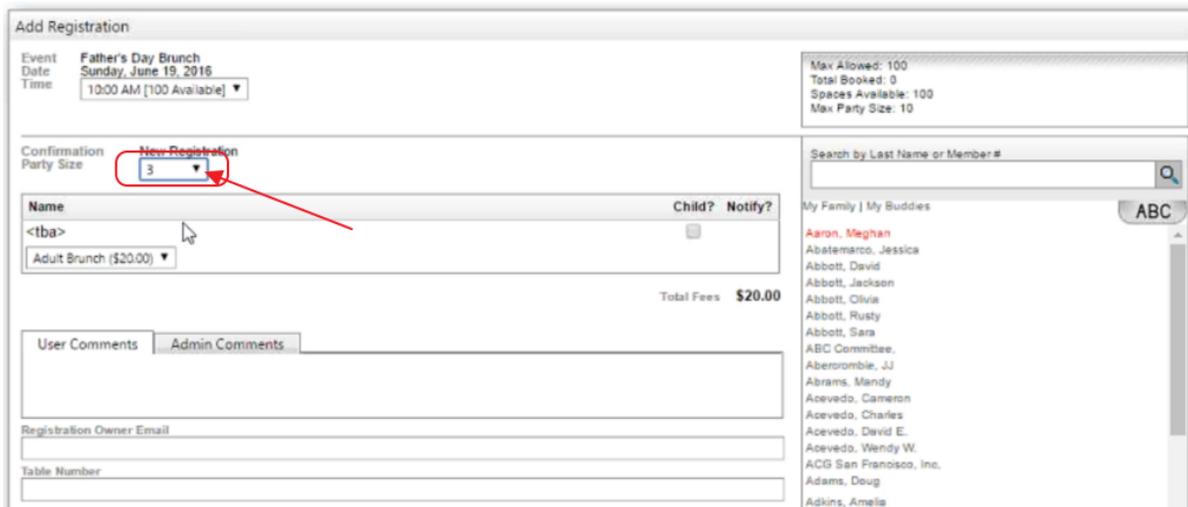
Click here to Perform Action(s) Search by Name, Email, or Mem# SEARCH

Confirm	Name ^	Email	Adults	Children	Reserved By	Create Date
There are No Active Reservations						

Registration Screen will then launch.

Complete Registration

Begin by designating Party size. In this example, Rusty Abbott has called, and will be bringing his spouse and child. Therefore, the Party Size is 3.



Add Registration

Event: Father's Day Brunch
Date: Sunday, June 19, 2016
Time: 10:00 AM [100 Available]

Max Allowed: 100
Total Booked: 0
Spaces Available: 100
Max Party Size: 10

Confirmation: **New Registration**
Party Size: 3

Name: <tba>
Child?:
Notify?:
Price: Adult Brunch (\$20.00)
Total Fees: \$20.00

User Comments:
Admin Comments:

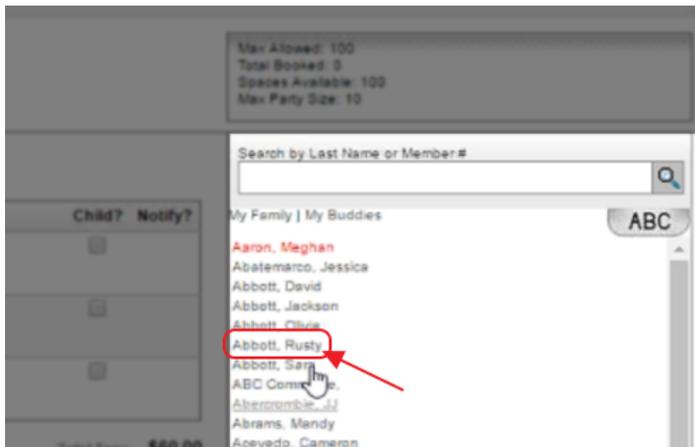
Registration Owner Email:
Table Number:

Search by Last Name or Member#

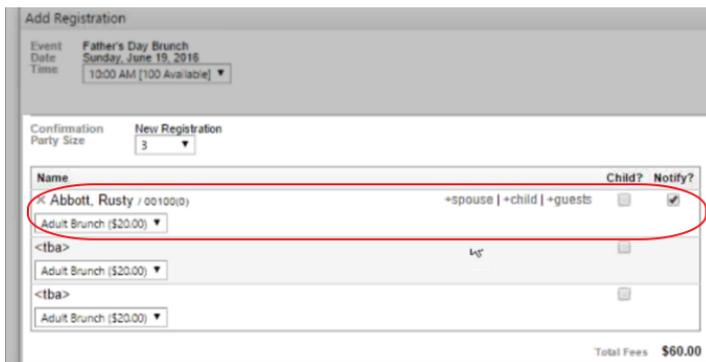
My Family | My Buddies

- Aaron, Meghan
- Abatemarco, Jessica
- Abbott, David
- Abbott, Jackson
- Abbott, Olivia
- Abbott, Rusty
- Abbott, Sara
- ABC Committee
- Aberromble, JJ
- Abrams, Mandy
- Acevedo, Cameron
- Acevedo, Charles
- Acevedo, David E.
- Acevedo, Wendy W.
- ACG San Francisco, Inc.
- Adams, Doug
- Adkins, Amelia

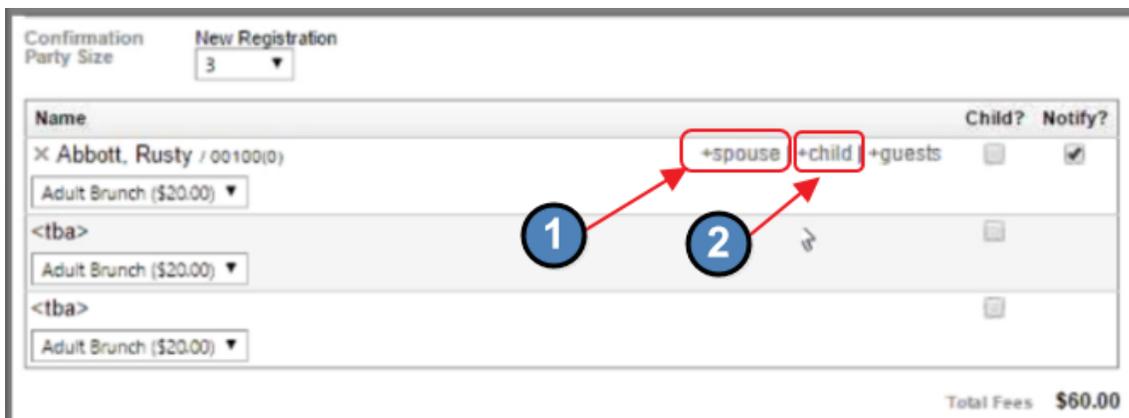
Next, select Member on the right side of the screen..



Note Member will then populate in Registered Attendee Grid.



Click "Spouse" and "Child" to indicate Rusty will be bringing his Spouse and Child with him to the Brunch. Note, Guest could also be added and screen to enter Guest's name (optionally) would appear.



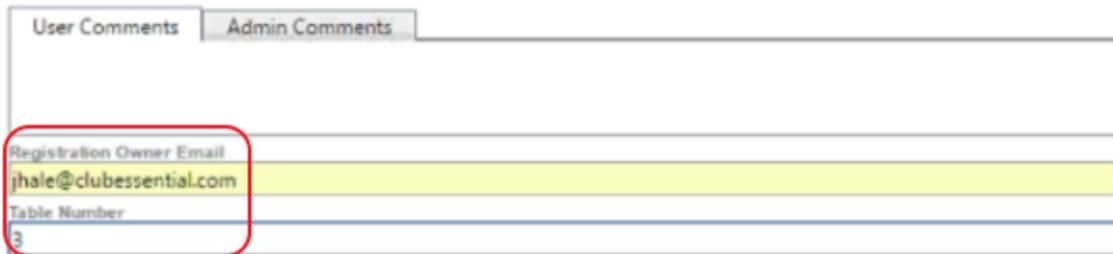
Proper pricing will auto-populate based on the respective "Spouse" and "Child" selection.



Name	Child?	Notify?
× Abbott, Rusty / 00100(0) Adult Brunch (\$20.00)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
× Abbott, Sara / 00100(1) Adult Brunch (\$20.00)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
× Abbott, Rusty - Child Child Brunch (\$15.00)	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Total Fees **\$55.00**

Additional fields, such as Registration Owner Email and preferred Table Number could be completed. If email address is already on file in Member's profile, email will auto-populate.



User Comments Admin Comments

Registration Owner Email
jhale@clubessential.com

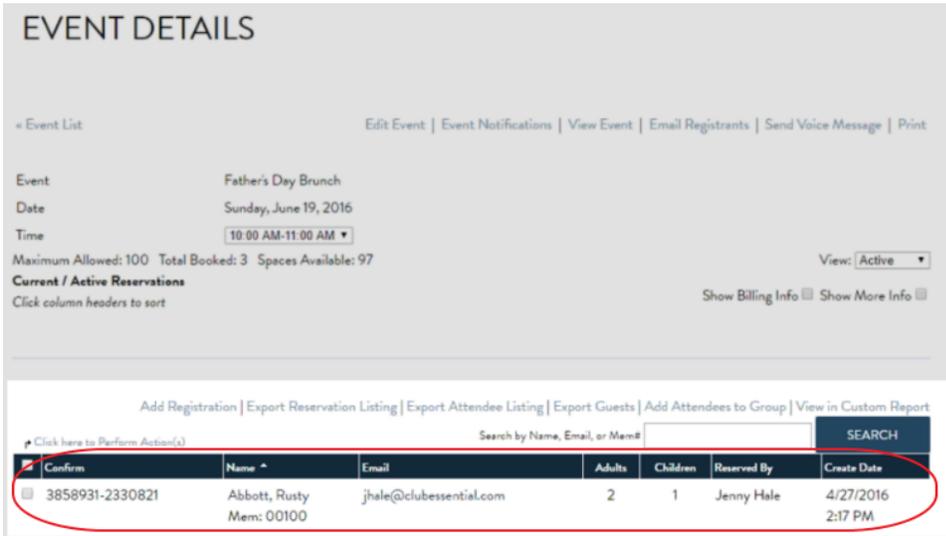
Table Number
3

Once complete, click, "Save Registration."



Review Registration

Registration will then appear in the Event Details.



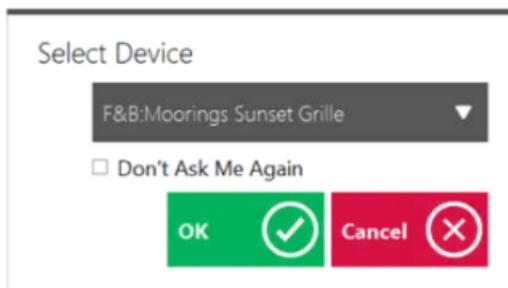
The screenshot shows the 'EVENT DETAILS' page for 'Father's Day Brunch' on Sunday, June 19, 2016, from 10:00 AM to 11:00 AM. It includes a table of current/active reservations. A red circle highlights the first reservation entry.

Confirm	Name ^	Email	Adults	Children	Reserved By	Create Date
<input type="checkbox"/> 3858931-2330821	Abbott, Rusty Mem: 00100	jhale@clubessential.com	2	1	Jenny Hale	4/27/2016 2:17 PM

Repeat process as required. Online registrations may be edited as necessary.

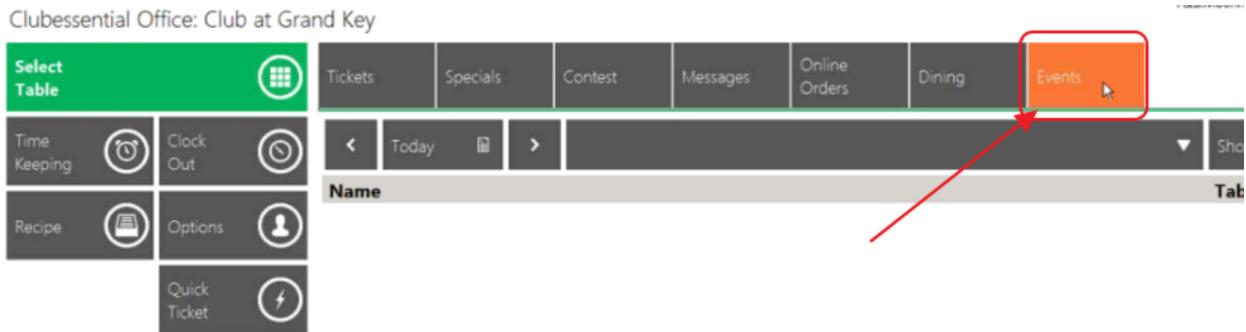
Point of Sale

To view the event registrations within the POS, log in to the proper POS Terminal associated with the Event Area. In the example provided, the Father's Day Brunch will take place in the Moorings Sunset Grille, and the POS terminal associated with the area is as follows:

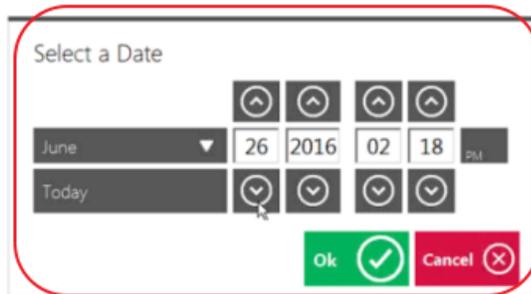
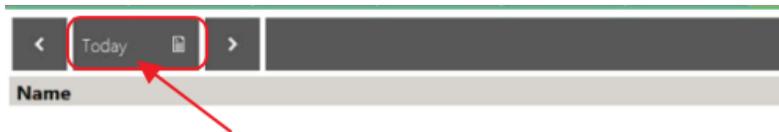


Events Tab

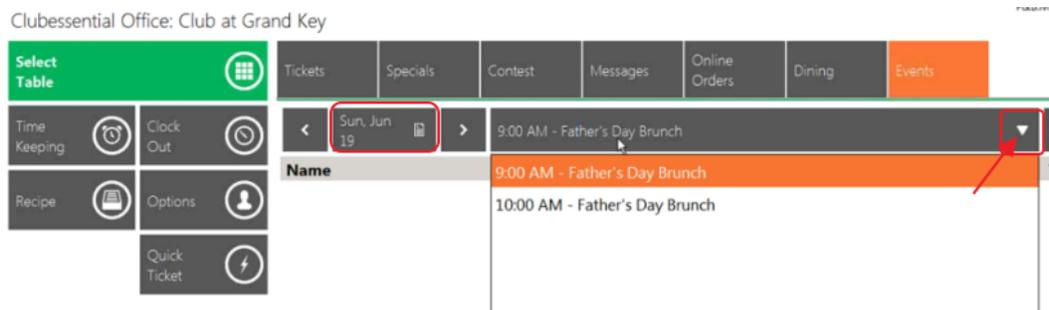
Once logged in, navigate to the “Events,” tab. All registrations will appear on this tab.



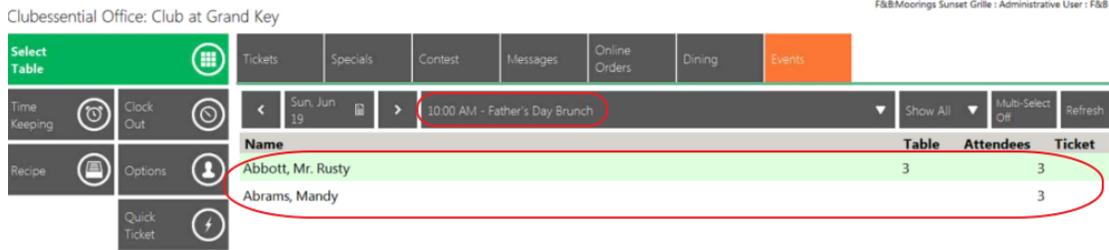
Events will default to today's date; however other date's events may be viewed by clicking on “Today” to launch the “Select a Date” window, or utilizing the arrows to the right and to the left of “Today” to move forward or backward one day at a time.



For the example, Father's Day Brunch occurs on June 19th. Both seatings are available for viewing when the date is set to June 19th.

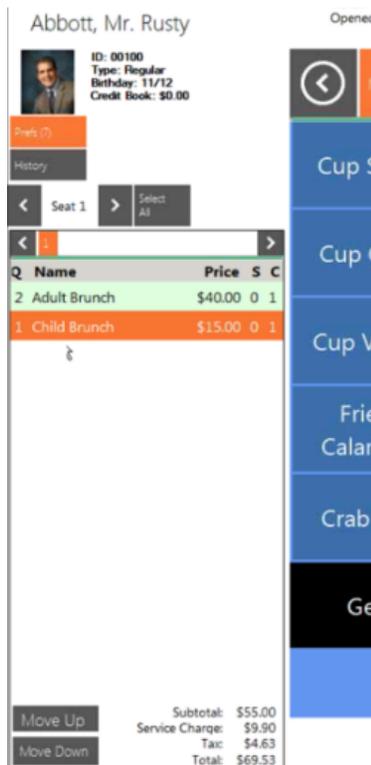
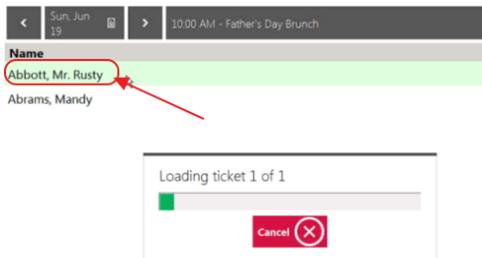


To view the Registrations, select the desired Seating, and existing registrations will appear in the grid below.

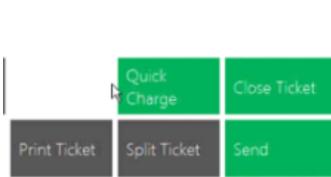


Convert Registrations to Member Charges

To convert the registrations into Open Tickets, click on the desired reservation, and ticket will be generated to reflect the Fee Assignments designated in the Reservation, ie. 2 Adult, and 1 Child.



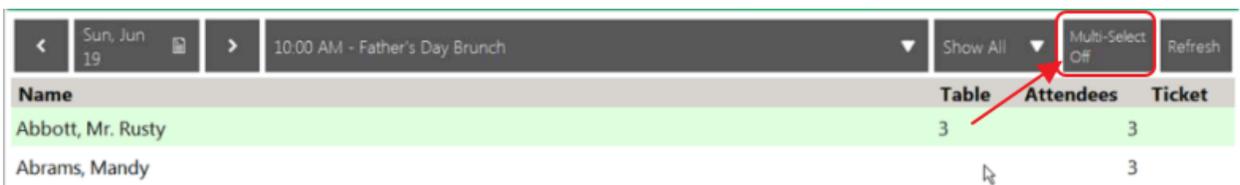
Tickets may be closed out as normal from this point, based on Member payment preference.



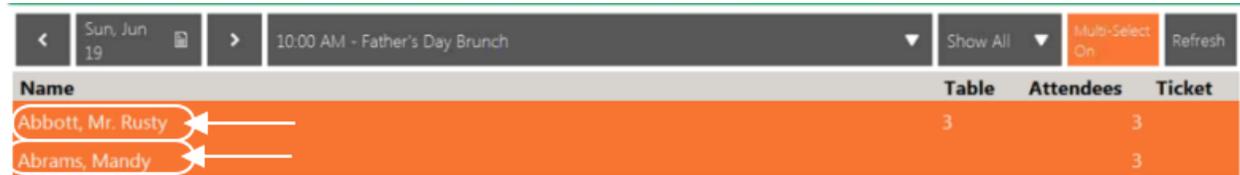
Member Charge All Function

When multiple reservation tickets exist, they have been reviewed for accuracy, and all Members desire to charge to their Member account, the Member Charge All feature may be used.

First, select "Multi-Select" to enable multiple ticket selection.



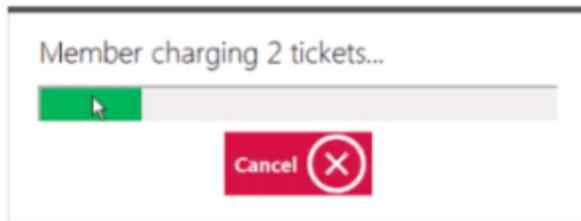
Next, select all tickets to be member charged.



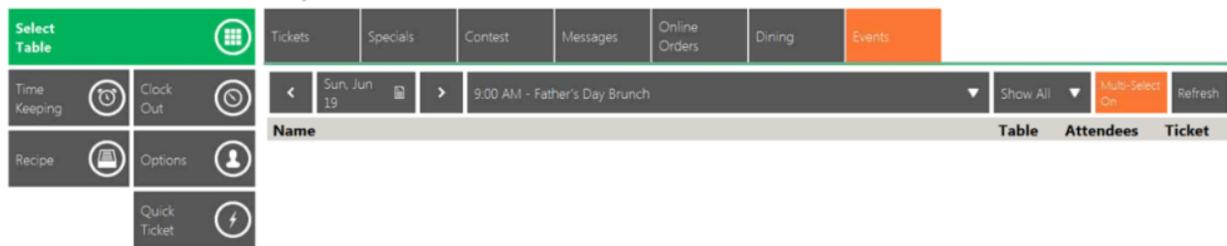
Then, choose, "Member Charge Selected," option from the bottom of the screen.



System will automatically “Member Charge” the tickets.



Note, tickets have been successfully closed out.



Common Questions and Concerns

We have identified items to sync, but they are not appearing in the Billing tab of the website. What’s the next step?

Ensure the Item Category for the Items you have set up for the Event are set to Sync by going to System Settings within the back Office, clicking on the Club Url endpoint, and verifying the Categories set to sync include the one attached to the Event. [Click here for more info.](#)

Best Practices

When price changes need to be made to an Event, make all Price Changes to the Items within Office. The price changes will then flow to the Axis-Website.

Use the Member Charge function only after reviewing the Tickets for accuracy.