



# Calendar & Event Manager

2016 - Fall Edition

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## Overview

The **Calendar** and the **Event Manager** provide the ability to announce upcoming events throughout the website, take online registration, and manage registration all from your Clubessential website. The **Calendar** is a repository for all events and activities, while the **Event Manager** is an Administrative tool that works in conjunction with the **Calendar**.

## Use Case(s)

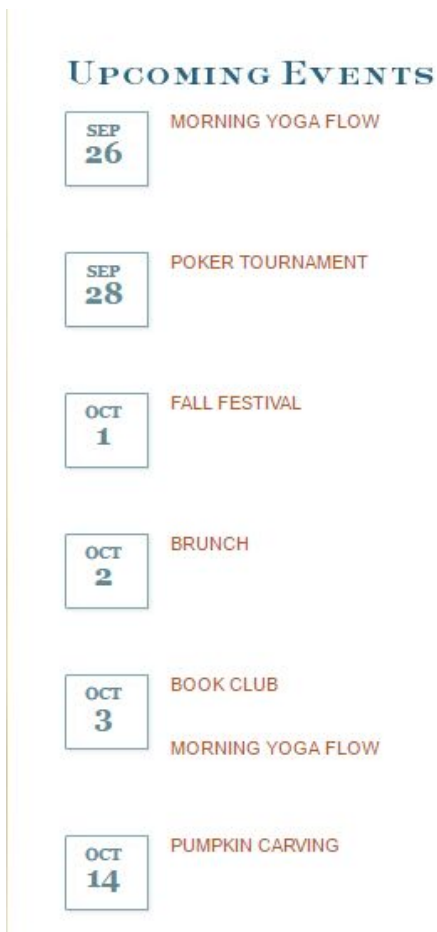
The **Calendar** and **Event Manager** are great ways to advertise and manage events at the club. The **Calendar** can be added as a full view calendar as its own page, or even as a condensed version in the form of a **Calendar Plug-in**. It is most effective to have an overall **Club Calendar** that houses all events, while you break out smaller **Calendars** for each section applicable on the website (example: **Golf Calendar**, **Fitness Calendar**, **Social Calendar**). In addition to the full **calendars**, many clubs find it useful to add a **Calendar Plug-in** on the member home page, or other pages, to promote events happening within the next few days. Since the **Calendar** takes online registration, it is essential to use the **Event Manager** alongside the calendar to manage registrations when applicable.

## Calendar Views

The calendar offers several views for Members. Understanding how the views look, as well as how and where the views are populated is critical to determining how the Calendar can best serve your Club. This section provide an overview of the various available Calendar views that may be implemented on your Website.

## Quickview

Most typically, this type of Calendar view is located on the member home page via the **Calendar Plug-in**. This view may also be used on any content page throughout the website. It will show the next X number of events over X number of days. Setting up the parameters and design of this view is managed by Clubessential based on information you provide. Events will dynamically populate this view based on the associated **Filter**. All events visible in the quickview need to be added via the Calendar - Full View.



The screenshot displays a vertical list of upcoming events under the heading "UPCOMING EVENTS". Each event is represented by a date in a box followed by the event title. The events listed are:

Date	Event Title
SEP 26	MORNING YOGA FLOW
SEP 28	POKER TOURNAMENT
OCT 1	FALL FESTIVAL
OCT 2	BRUNCH
OCT 3	BOOK CLUB
OCT 3	MORNING YOGA FLOW
OCT 14	PUMPKIN CARVING

## Full View

This is the full view of the **Calendar**, and can be set to show day, week, month, year, or list view. It is most common to show this as month view; however, members may change their view manually on the site if desired. This view houses the Event Creation tools which will be discussed in the next section.

### CLUB CALENDAR

Admin Bar: [Help](#) | [Add Single Day Event](#) | [Add Multi-Day Event](#)

[Add Personal Event](#) | [Export Calendar](#) | [Checkout](#) | [Printable Version](#)

★ New Event
● Other
⊘ Not Yet Open
● Available
● Reserved
● Wait Listed
⊘ Sold Out
● Closed

[Day](#)
[Week](#)
[Month](#)
[Year](#)
[List](#)
[Family](#)
[Search](#)
[Filters](#)

Quick Filter Filter: Show Personal & Show All

◀ September 2016 ▶

	Sun	Mon	Tue	Wed	Thu	Fri	Sat
28		29 ★ ● Morning Yoga Flow	30 ● Brunch ● Craft Night	31	Sep 1 Fall Hours Begin	2 ● Date Night	3
4		5 ★ ● Morning Yoga Flow	6 ● Craft Night ● Brunch	7	8	9 ● Date Night ● Pilates	10
11		12 ★ ● Morning Yoga Flow	13	14	15	16	17
18		19	20	21	22	23	24
25		26 ★ ● Morning Yoga Flow	27	28 ★ ● Poker Tournament	29	30	Oct 1 ★ Fall Festival
2	● Brunch	3 ★ ● Book Club ★ ● Morning Yoga Flow	4	5	6	7	8

## Event View

This is the detailed view of each event, and is the view Members will see once they click on the Event from the Full View, or from the Quickview. Here, dates and detailed times of the event are listed, along with a **Register** button if the event is one a member can register for. Additional info, such as text and imagery can be added; or use of an **Event Flyer** may also be added.

Day Week Month Year List Family Search Filters

◀ Back ◀ Prev Event Morning Yoga Flow Next Event ▶


Print Open Event Manager Sync Event Help for this Page ?

### MORNING YOGA FLOW

Monday, October 03, 2016 7:00 AM - 8:30 AM

CLICK HERE TO REGISTER  ADD TO EVENT CART

Allowed 20, Booked 0



### FLOW THROUGH YOUR DAY

BY JOINING YOGA FLOW

Wake up your mind, body, and spirit with sun salutations to start your day. Beginning at 7am we will practice an hour and half long yoga flow session.

# Events

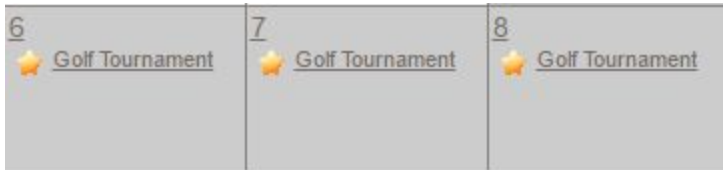
## Event Types

There are three types of events, which can be added using two buttons on the **Calendar**.

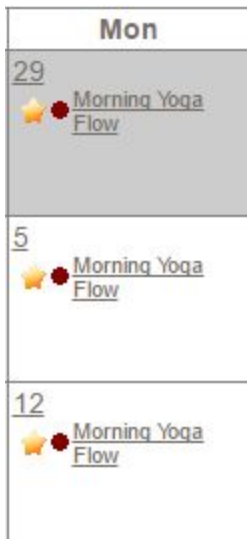
**Single Day Event:** one time event, such as Valentine’s Day or Mother’s Day. The Attendee only needs to come to the single event once.



**Multi-Day Event:** occurs over a period of time such as camps or tournaments. The Attendee must come to every day of the event, but only signs up once for this event.



**Recurring Event:** single day event that recurs, such as a Wednesday night dinner special; or even a recurring monthly event like Movie Night. The attendee is required to sign up for each event individually, but the same parameters for the event recur.



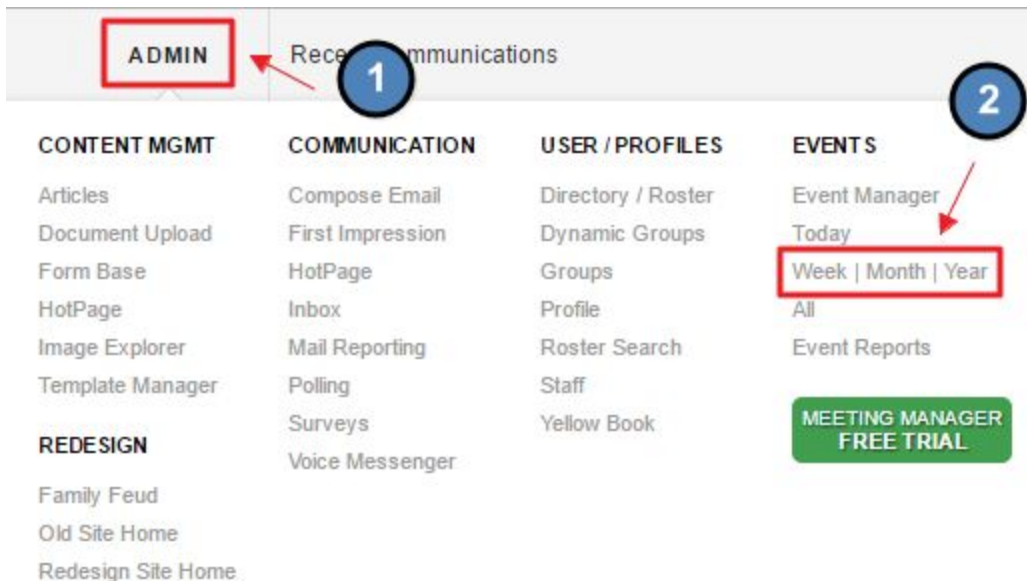
## Adding an Event

### Accessing the Toolset

Navigate to the **Full View** of the calendar, which is usually located in the main navigation.

If the website does not have a link to the **Full View** calendar in the navigation, you can access the calendar in different ways depending on your access role.

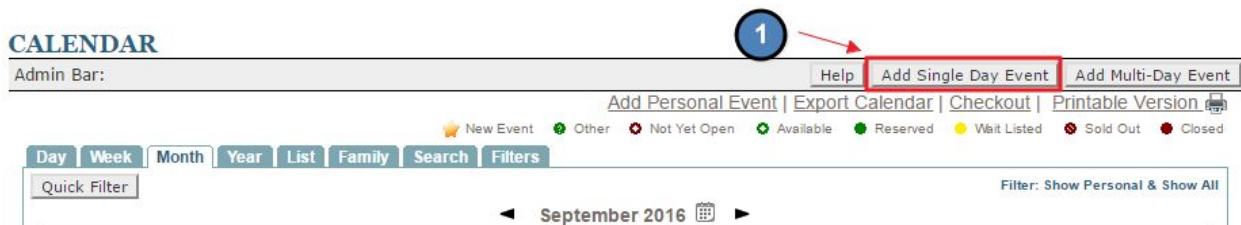
**Admins:** Hover over **Admin** bar in the left hand corner of the screen, select **Week | Month | Year**.



**Editors:** Hover over **Admin** in the main navigation, select **Main Tools**, and then **Calendar**.



Click the **Add Single Day Event Button** in the calendar interface.



This will launch the **Add Event Interface** to begin adding criteria for the event.



Add Event
2

Step 1 - Event Detail

Event Title

Event Summary

Grouping Code

Event Status Published

Title Position Site Default

Clickable Event  Allow Public View?

Allow Members to Email Event?

Categories  
Please enter at least one

Select All
 

- Golf
  - Golf Calendar
  - Golf Tournaments
  - MGA Calendar
  - WGA Calendar
- Jr. Activities
  - Jr. Activities Calendar



Event Thumbnail

All day Event  Has End Time?

Start Time 12:00 AM

September, 2016

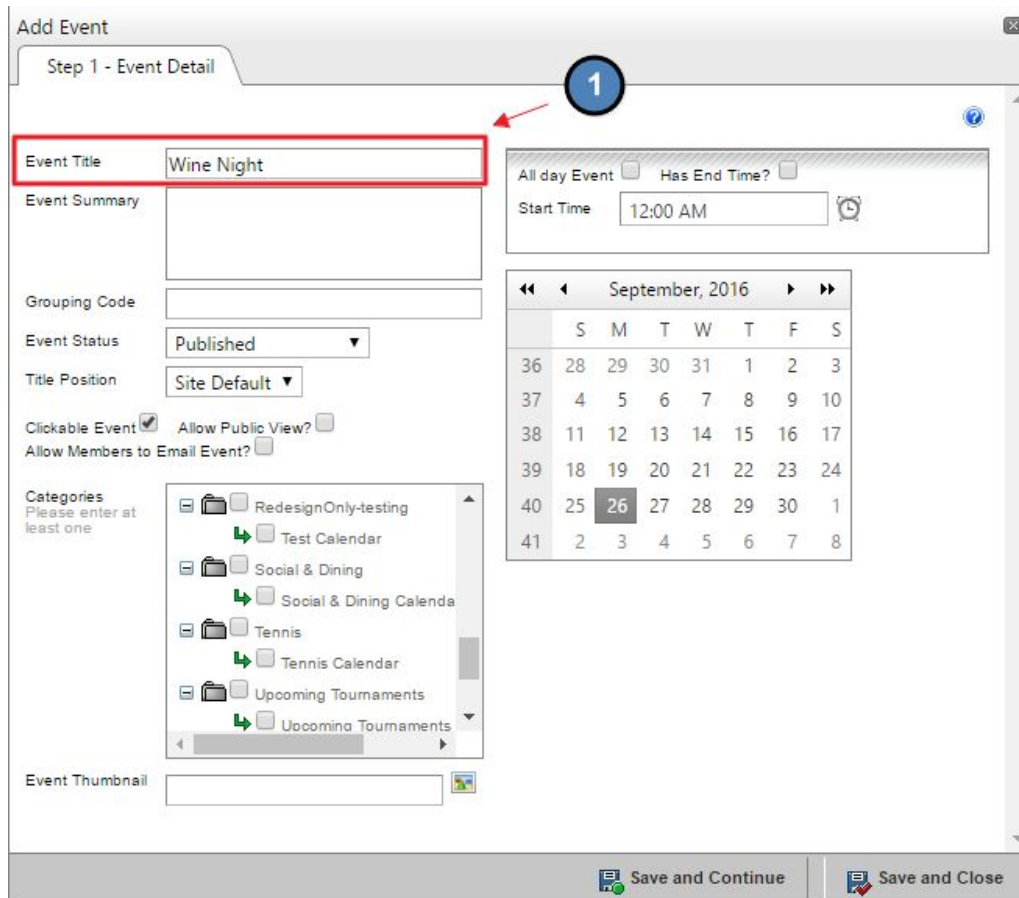
	S	M	T	W	T	F	S
36	28	29	30	31	1	2	3
37	4	5	6	7	8	9	10
38	11	12	13	14	15	16	17
39	18	19	20	21	22	23	24
40	25	26	27	28	29	30	1
41	2	3	4	5	6	7	8

 Save and Continue
 Save and Close

## Step 1 - Event Details - Basic

To set up an Event, begin by completing the basic event details contained on this screen.

**Name:** this is the title of the event and will show on the full calendar or on the calendar Quickview as the **Event Title**.



**Add Event**  
Step 1 - Event Detail

Event Title: **Wine Night**

Event Summary: [Empty text area]

Grouping Code: [Empty text area]

Event Status: Published

Title Position: Site Default

Clickable Event:  Allow Public View?:   
Allow Members to Email Event?:

Categories: Please enter at least one

- RedesignOnly-testing
- Test Calendar
- Social & Dining
- Social & Dining Calendar
- Tennis
- Tennis Calendar
- Upcoming Tournaments
- Upcoming Tournaments

Event Thumbnail: [Image icon]

All day Event:  Has End Time?:   
Start Time: 12:00 AM

September, 2016

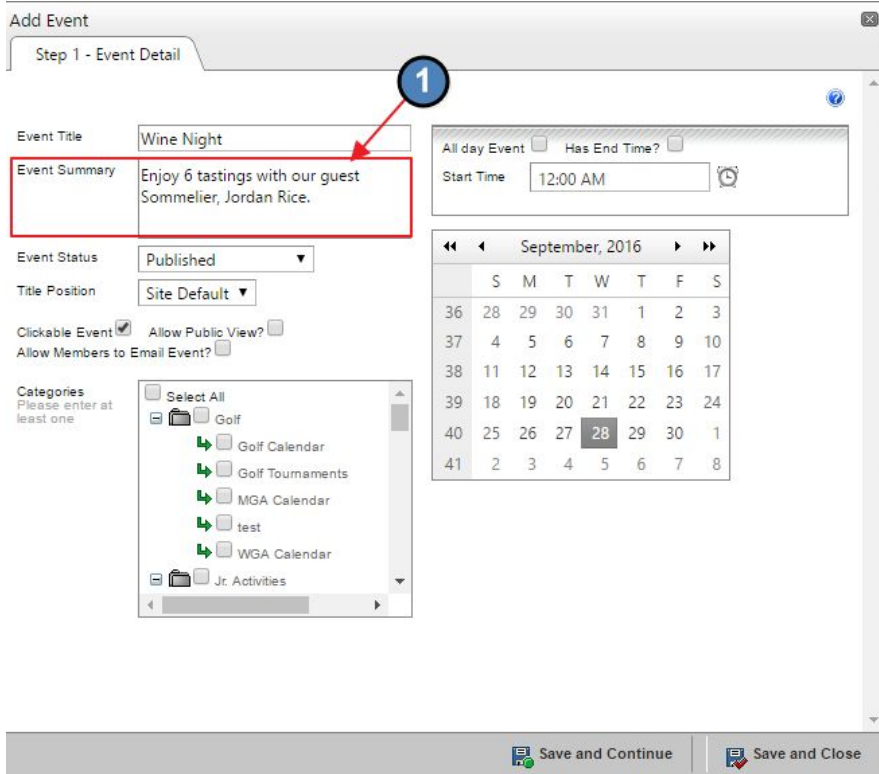
	S	M	T	W	T	F	S
36	28	29	30	31	1	2	3
37	4	5	6	7	8	9	10
38	11	12	13	14	15	16	17
39	18	19	20	21	22	23	24
40	25	<b>26</b>	27	28	29	30	1
41	2	3	4	5	6	7	8

Save and Continue | Save and Close

(Example of how the **Event Title** field displays on the **Full View**)



**Event Summary:** this will show on the calendar quickview. This is intended for a quick description of the event. Detailed information will be added in a later option.



**Add Event**  
Step 1 - Event Detail

Event Title: Wine Night

Event Summary: Enjoy 6 tastings with our guest Sommelier, Jordan Rice.

Event Status: Published

Title Position: Site Default

Clickable Event:  Allow Public View?:   
Allow Members to Email Event?:

Categories: Please enter at least one

- Select All
- Golf
  - Golf Calendar
  - Golf Tournaments
- MGA Calendar
- test
- WGA Calendar
- Jr. Activities

Calendar: September, 2016

Save and Continue | Save and Close

(Example of how the **Event Summary** field displays on the **Event Detail View**)

## WINE NIGHT

Admin Bar:



Day | Week | Month | Year | List | Family | Search | Filters

◀ Back | ◀ Prev Event | Wine Night | Next Event ▶

Print | Sync Event | Help for this Page ?

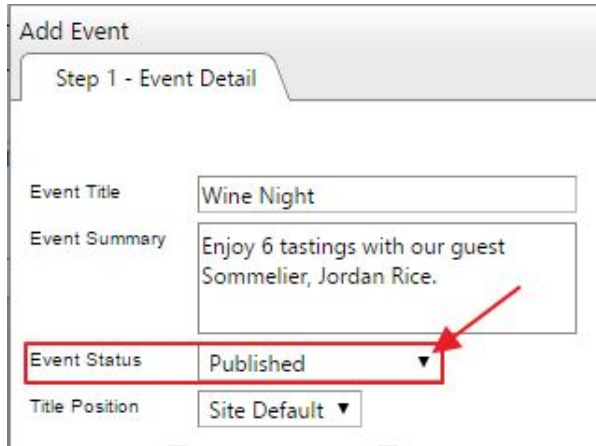
**WINE NIGHT**

Tuesday, October 04, 2016 7:00 PM - 10:00 PM

Enjoy 6 tastings with our guest Sommelier, Jordan Rice.

### Event Status

- **Published:** if this is selected, the event will post immediately.



Add Event

Step 1 - Event Detail

Event Title: Wine Night

Event Summary: Enjoy 6 tastings with our guest Sommelier, Jordan Rice.

Event Status: Published

Title Position: Site Default

- **Unpublished** is used to prepare the event for the calendar, but it is not visible to members. This will only allow it to be viewed by Administrators.

Event Status: Unpublished

- **Hidden Registration:** this posts the event, but the club will use the **Event Manager** to capture attendees rather than members registering via the **calendar**.

Event Status: Hidden Registration

**Title Position:** determines the location of the **Event Title** on the page. This may be placed above or below the flyer.

Title Position: Above Flyer

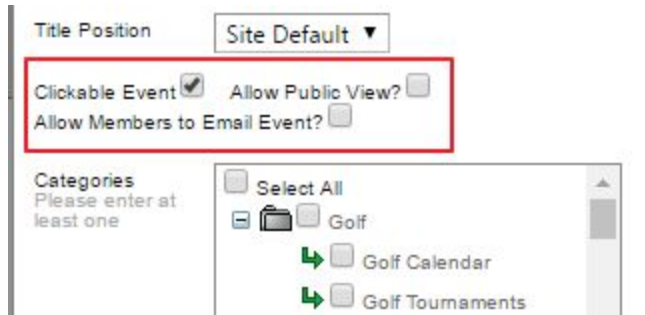
Title Position: Below Flyer

**Clickable Event:** by default, this is always checked. This will allow members to click the **Event Title** for more information on the event. This must be kept checked if the event is one that a

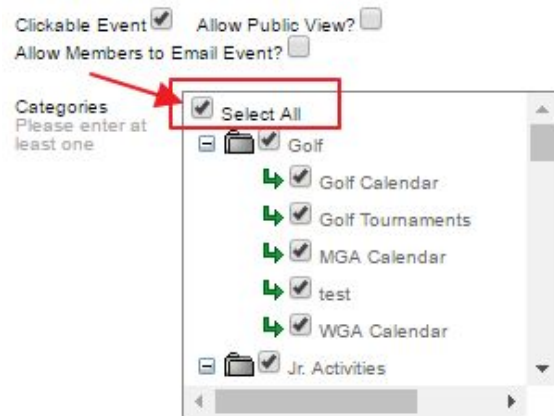
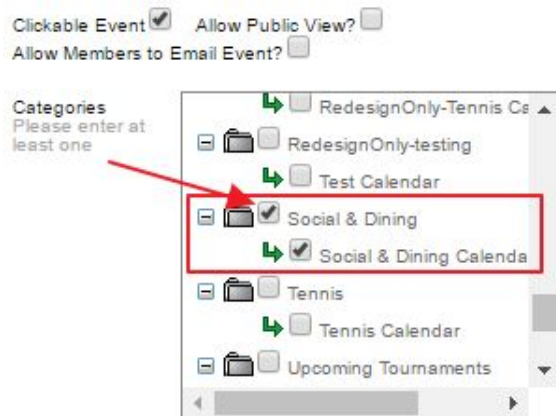
member may register for. Uses for a non-clickable event may be for a calendar notification such as: Club Closed on Mondays.

**Allow Public View:** To make the event visible to the Public (rather than just the Private Member side), click this option.

**Allow Members to Email Event:** To allow Members to send an email to the Event. When checked, option will display for Members to email link to Event from Event detail view.



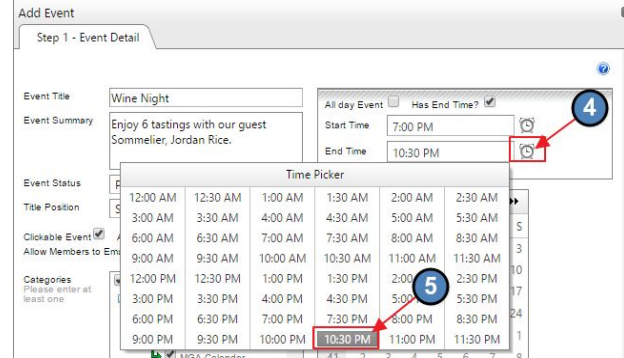
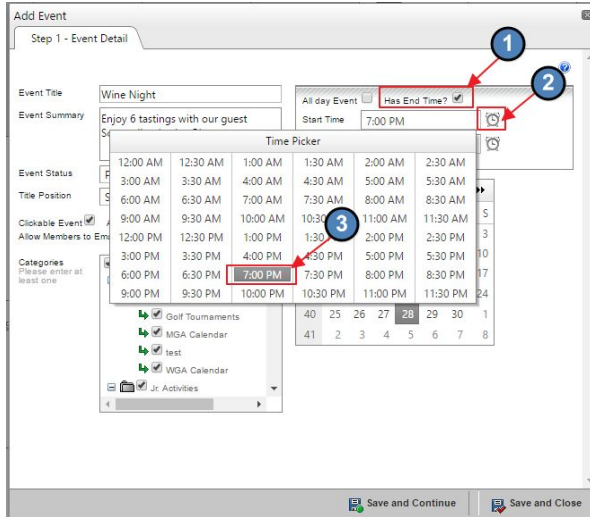
**Categories:** Check the appropriate boxes/filters to designate where the event will distribute through the website. For instance, if you're using a **Golf Calendar** under the golf section - clicking the **Golf Calendar** filter will allow this to populate on the **Golf Calendar**. An **Interest Area** must be chosen in order to save and continue. Check **Select All** option to place event in all categories.



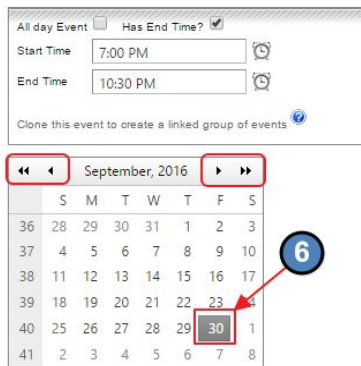
**Time and Date of the Event:** Moving to the top right of the Event Detail screen, we can then designate the time and date of the event.

**Set Time:** If applicable, designate whether the Event is an **All day Event**, or if it **Has an End Time** (in addition to a start time).

For Events that have a specific **Start Time** (and **End Time**), designate the time(s) as follows.



**Set Date:** Click on day of Calendar to specify date of the event. (Note: Use arrows next to Month to navigate forward or backward.)



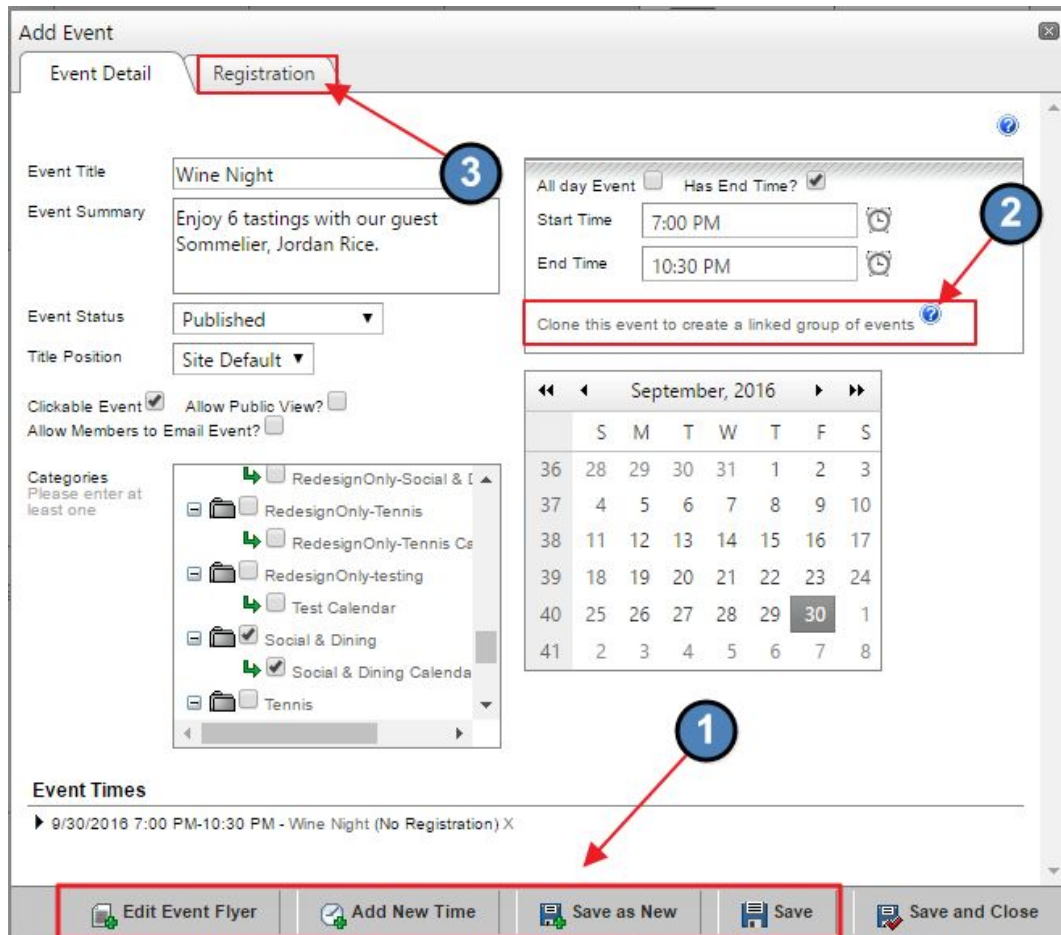
Next, click **Save and Continue** to continue setting up the event.



## Step 2 - Additional Event Options/Registration

Once **Save and Continue** is selected, the following changes are noticeable:

- 1) New options are now available at the bottom of the screen to continue setting up the event including: **Edit Event Flyer, Add New (Event) Time, Save as New, and Save** (was previously **Save and Continue**).
- 2) A new feature, **Clone this Event**, is available on the current tab.
- 3) A new tab, **Registration** is also now available.



In this section, we will cover these additional details.

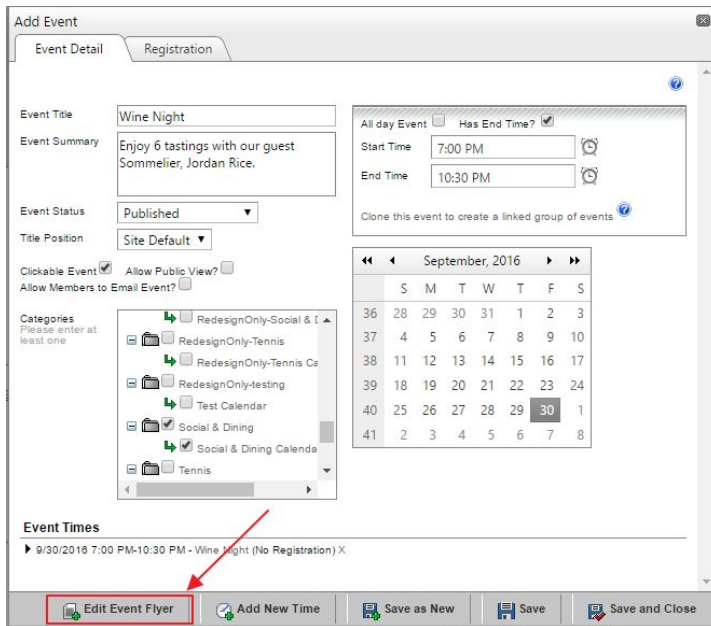


## Additional Event Options

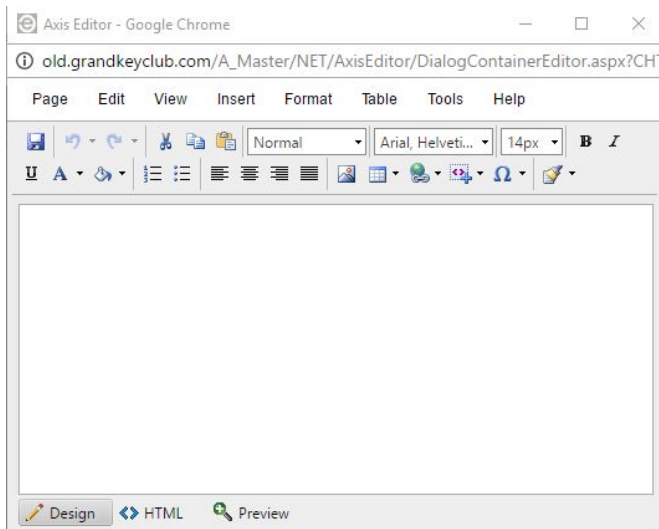
### Edit Event Flyer - Add a Flyer to Your Event

An **Event Flyer** is a great marketing opportunity for events. The **Event Flyer** is managed via the **Editor**, which allows for flexibility and ease of use. Here you may add text and imagery to enhance your marketing efforts for the event while offering detailed information on the event.

To add an **Event Flyer** to your Event, click **Edit Event Flyer**.

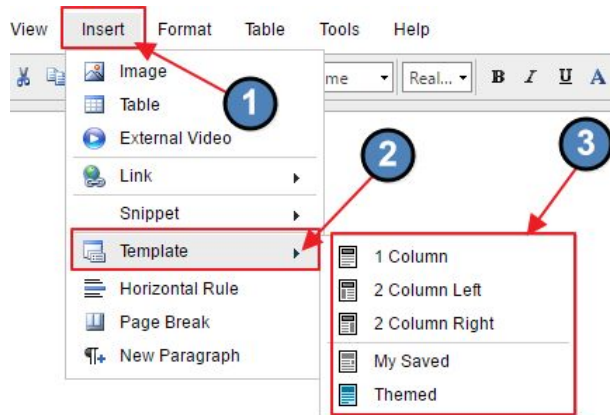


The **Editor** interface will launch.



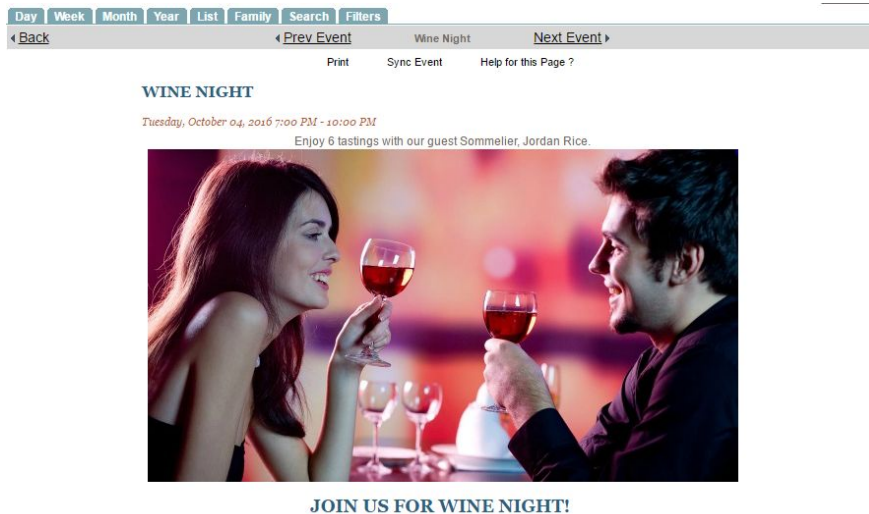


**Templates** may be used (and are the easiest way) to create a flyer. To utilize a Template, choose, **Insert, Template**, and then select your desired template Type.



- If you have an **event flyer** created in another offline source, such as a PDF or Word Doc, simply save as a **Jpeg** and upload to the **Image Explorer**. **Insert as an image** from the **Image Explorer**.
- Create your own message using plain text and imagery, just as you would throughout the website.

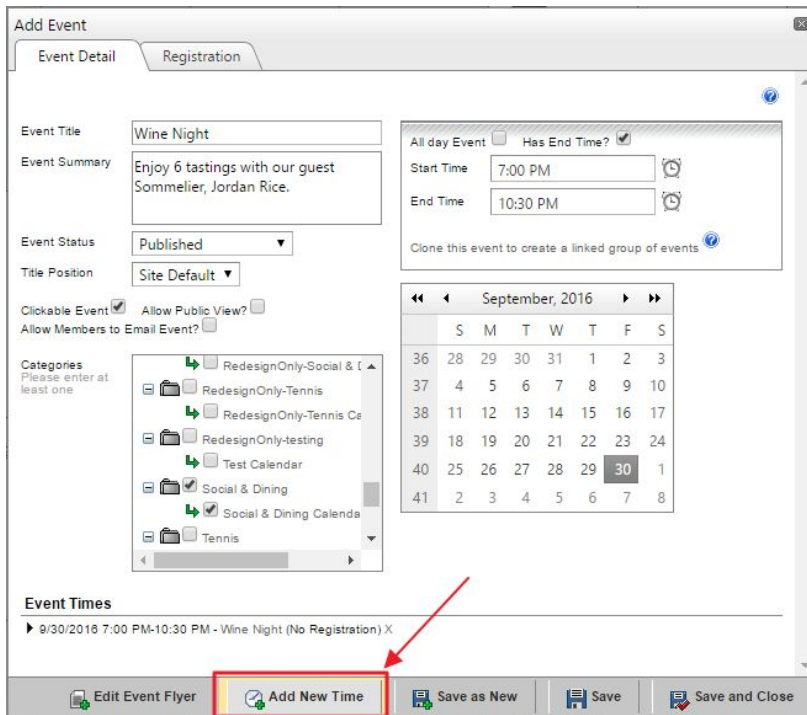
Below is how the **Event Flyer** will appear in the **Event Details** for your membership.



## Add New Time - Create Multiple Seatings

For events that have multiple seatings or start times (such as an Easter Brunch that takes place from 11am-2pm, but attendees must choose to show up at separate **event times**: 11am, Noon, and 1pm for instance), use the **Add New Time** option to add additional event times to the event.

To add an additional time to the event, click **Add New Time**.

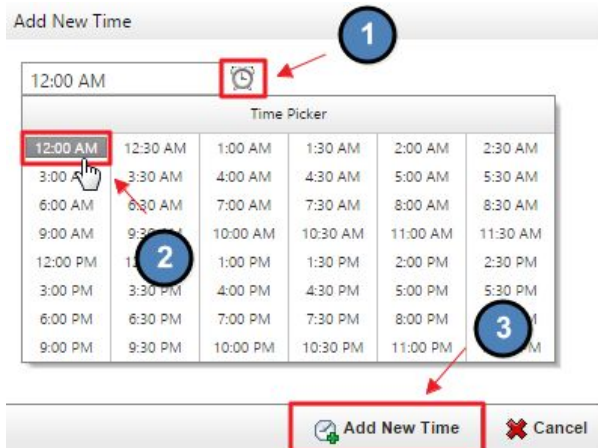


The screenshot shows the 'Add Event' form with the following details:

- Event Title:** Wine Night
- Event Summary:** Enjoy 6 tastings with our guest Sommelier, Jordan Rice.
- Event Status:** Published
- Title Position:** Site Default
- Clickable Event:**  Allow Public View?
- Allow Members to Email Event?**
- Categories:** RedesignOnly-Social & I, RedesignOnly-Tennis, RedesignOnly-Tennis Co, RedesignOnly-testing, Test Calendar, Social & Dining, Social & Dining Calenda, Tennis
- Event Times:** 9/30/2016 7:00 PM-10:30 PM - Wine Night (No Registration) X

The 'Add New Time' button is highlighted with a red box and a red arrow points to it.

Then, **click the Time Picker** to select the additional time to be added. **Click Add New Time** once the new time has been selected.



### Save as New - Copy the Event

The **Save as New** option copies the original event but does not link the event, so changes in the original event will not be changed if changes occur in the **save as new event**. This option is useful when creating a new event that is similar to a previously established event.



### Save

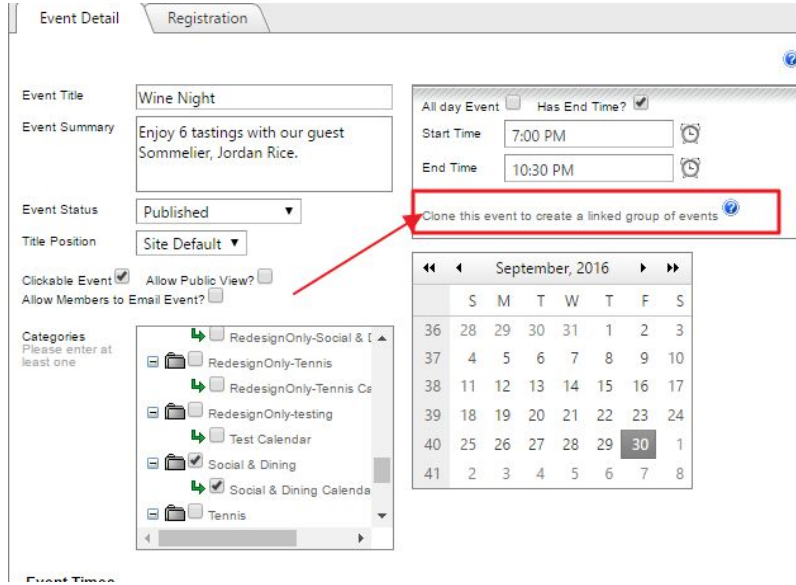
The **Save** option saves the event at the current moment in time, and allows you to continue editing the Event.



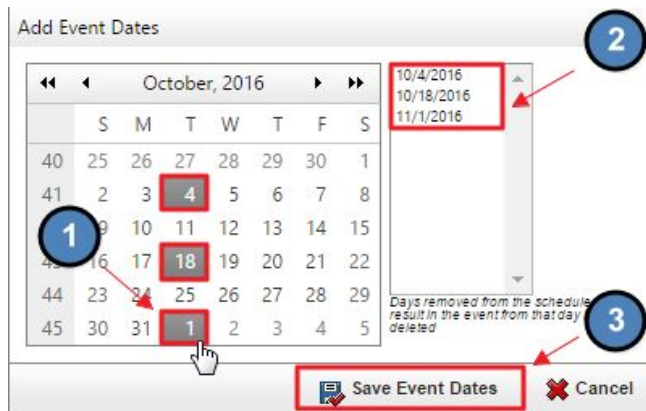
### Clone This Event - Create a Recurring Event

The **Clone This Event to Create a Linked Group of Events** allows you to set up recurring events. From here, you may add additional event days. All event information will be carried over to each new event day. These are still **Single Day Events** where attendees must sign up for each event individually.

First, click the **Clone This Event to Create a Linked Group of Events**.

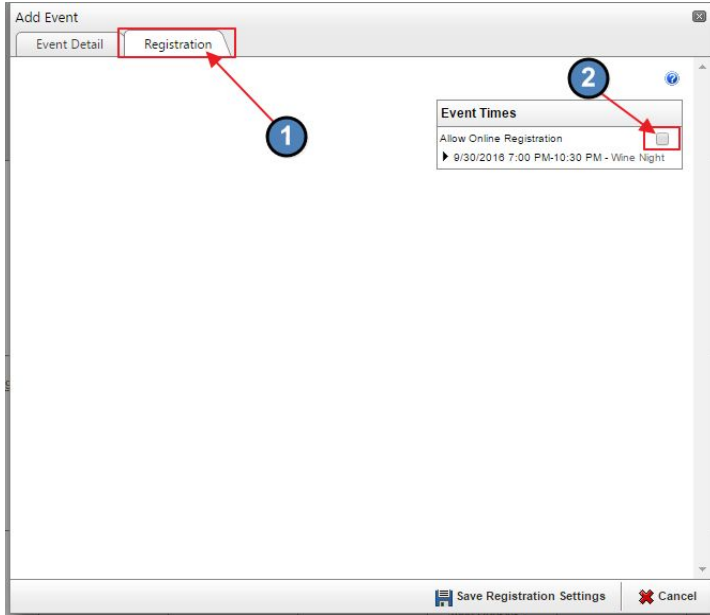


This will then launch the calendar picker. **Click** dates to add to the date interface. Once all dates are added, **click Save Event Dates**.

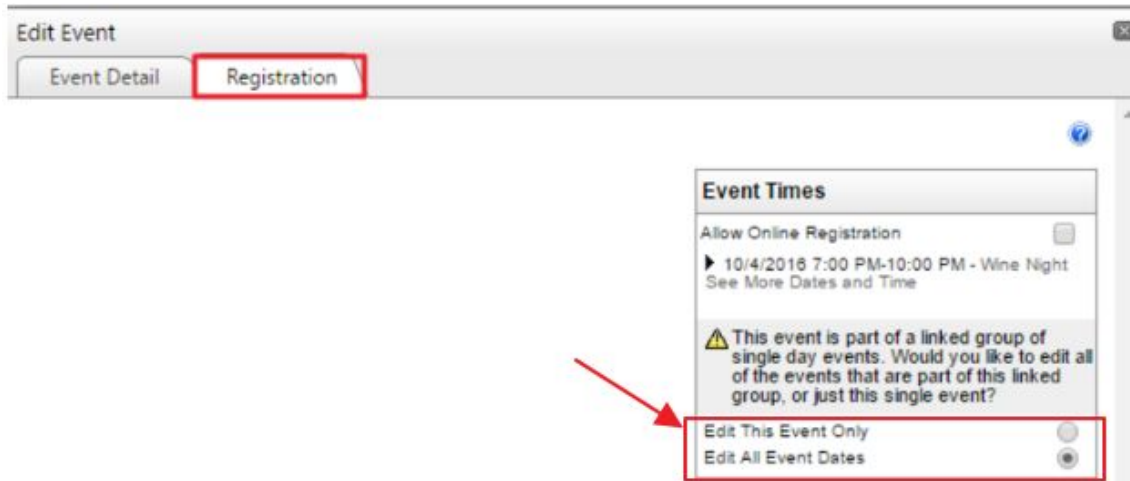


### Registration Tab

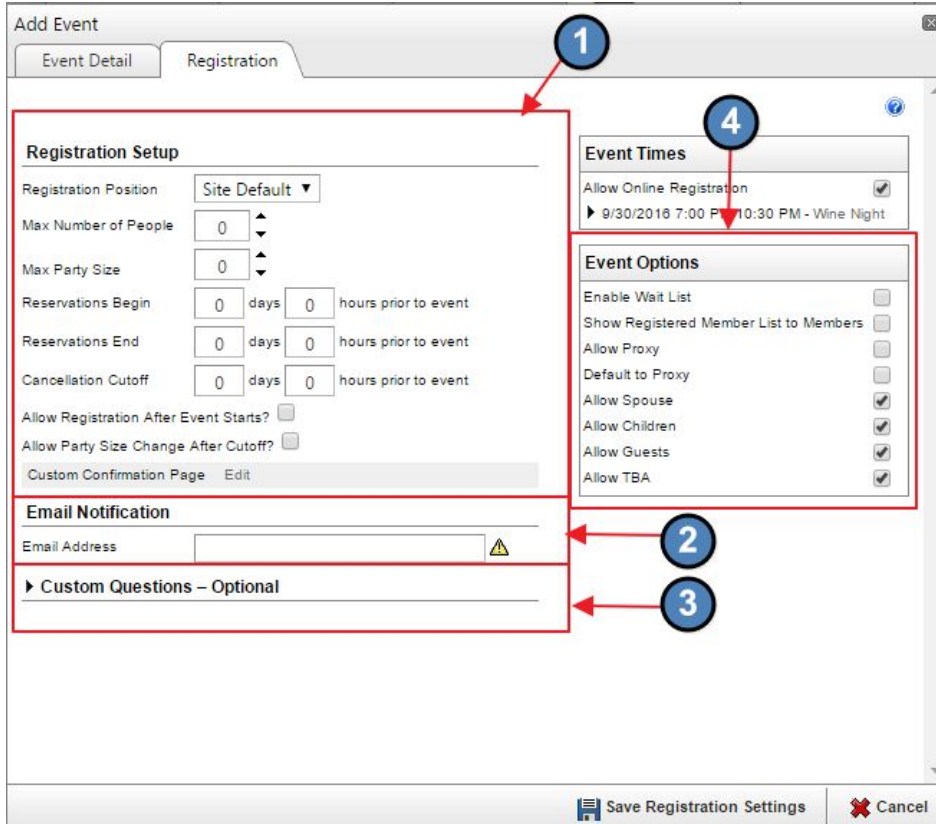
The **Calendar** allows for online registration for attendees. This works seamlessly alongside the **Event Manager**, so that all event management can be done on your Clubessential website. **Online Registration** is convenient and easy for members who can register at any time of day without assistance from the Club.



Note: for **Recurring Events**, this screen will have an additional option where you can specify whether you would like to **Edit This Event Only**, or **Edit All Event Dates**.

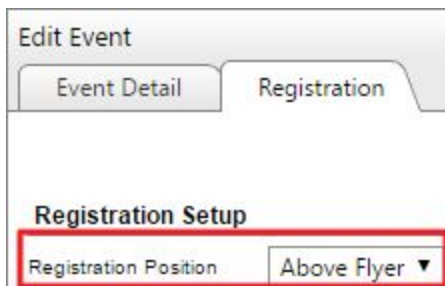
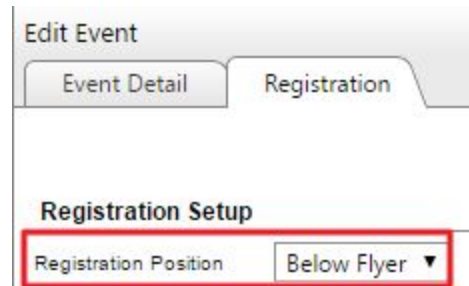


Once the **Allow Online Registration** option has been checked, the **Registration Setup**, **Email Notification**, **Custom Questions - Optional**, and **Event Options** sections appear for editing.

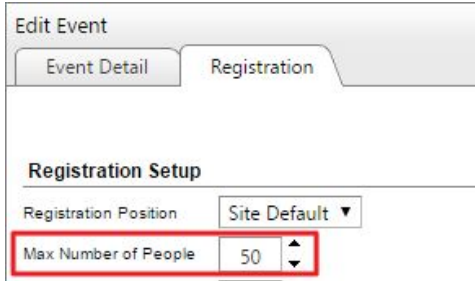


### Registration Setup

The **Registration Position** changes where the **Registration Button** will be placed in the event details. The button may be placed above the event flyer, below the event flyer, or both above and below the event flyer. Use the drop down to choose between **Above Flyer**, **Below Flyer**, or **Both**.

**Max Number of People** sets how many registrations are available for the event. (example 100 total attendees).



Edit Event

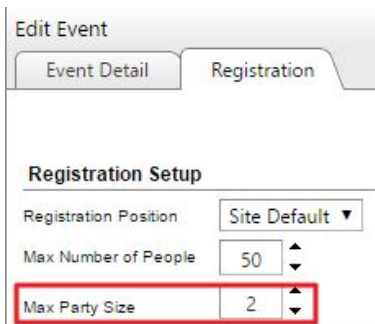
Event Detail Registration

**Registration Setup**

Registration Position Site Default ▼

Max Number of People 50 ▲▼

**Max Party Size** sets the max number of people allowed in a party registration (example: 5 people max per party).



Edit Event

Event Detail Registration

**Registration Setup**

Registration Position Site Default ▼

Max Number of People 50 ▲▼

Max Party Size 2 ▲▼

**Reservations Begins** sets the day and the time that a person may sign up for an event.

Click the **Date Picker** to select a day.



**Edit Event**

Event Detail | **Registration**

---



**Registration Setup**


Registration Position: Site Default


Max Number of People: 50


Max Party Size: 2


Reservations Begin: 10/4/2016 7:00 PM

Reservations End:  


Cancellation Cutoff: 

Allow Registration After Event: 

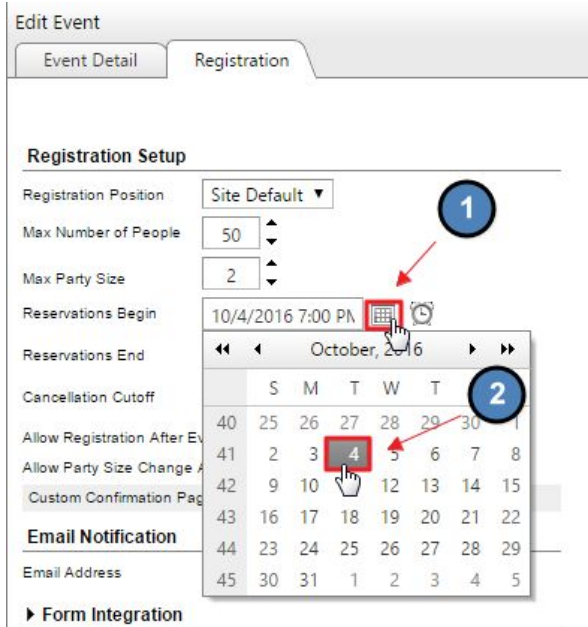
Allow Party Size Change After Event: 

Custom Confirmation Page: 

**Email Notification**

Email Address: 

▶ Form Integration



Click the **Time Picker** to select a time.

**Edit Event**

Event Detail | **Registration**

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**Registration Setup**


Registration Position: Site Default


Max Number of People: 50


Max Party Size: 2


Reservations Begin: 10/4/2016 7:00 PM

Reservations End:  


Cancellation Cutoff: 

Allow Registration After Event: 

Allow Party Size Change After Event: 

Custom Confirmation Page: 

**Email Notification**


Email Address: 

▶ Form Integration

**Event Times**

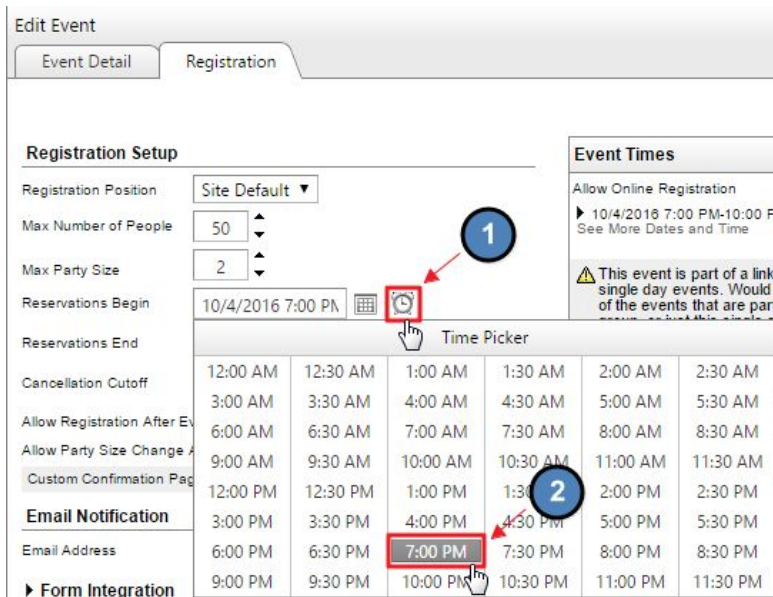
Allow Online Registration

▶ 10/4/2016 7:00 PM-10:00 PM  
See More Dates and Time

 This event is part of a linked single day events. Would you like to edit the times for all of the events that are part of this event?

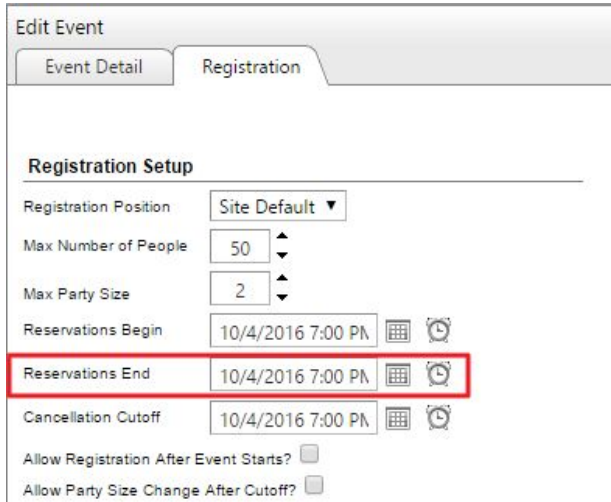
**Time Picker**

12:00 AM	12:30 AM	1:00 AM	1:30 AM	2:00 AM	2:30 AM
3:00 AM	3:30 AM	4:00 AM	4:30 AM	5:00 AM	5:30 AM
6:00 AM	6:30 AM	7:00 AM	7:30 AM	8:00 AM	8:30 AM
9:00 AM	9:30 AM	10:00 AM	10:30 AM	11:00 AM	11:30 AM
12:00 PM	12:30 PM	1:00 PM	1:30 PM	2:00 PM	2:30 PM
3:00 PM	3:30 PM	4:00 PM	4:30 PM	5:00 PM	5:30 PM
6:00 PM	6:30 PM	7:00 PM	7:30 PM	8:00 PM	8:30 PM
9:00 PM	9:30 PM	10:00 PM	10:30 PM	11:00 PM	11:30 PM



**Reservations Ends** sets the day and the time that reservations must be made by before registration closes. Use the **date** and **time picker** options previously demonstrated to select options.





**Edit Event**

Event Detail | **Registration**

---

**Registration Setup**

Registration Position: Site Default ▾

Max Number of People: 50 ▲ ▼

Max Party Size: 2 ▲ ▼

Reservations Begin: 10/4/2016 7:00 PM [calendar] [clock]

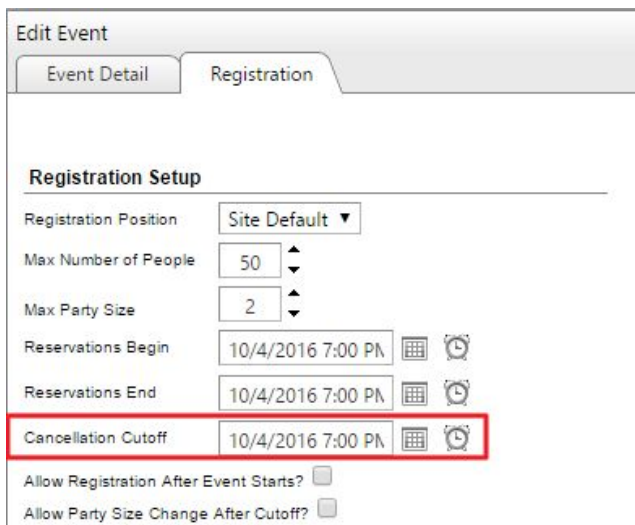
**Reservations End: 10/4/2016 7:00 PM [calendar] [clock]**

Cancellation Cutoff: 10/4/2016 7:00 PM [calendar] [clock]

Allow Registration After Event Starts?

Allow Party Size Change After Cutoff?

**Cancellation Cutoff:** sets the day that cancellations may no longer be made. This will also use the **date** and **time picker** to select options *Note: some clubs prefer to post a **cancellation policy** rather than using this method.*



**Edit Event**

Event Detail | **Registration**

---

**Registration Setup**

Registration Position: Site Default ▾

Max Number of People: 50 ▲ ▼

Max Party Size: 2 ▲ ▼

Reservations Begin: 10/4/2016 7:00 PM [calendar] [clock]

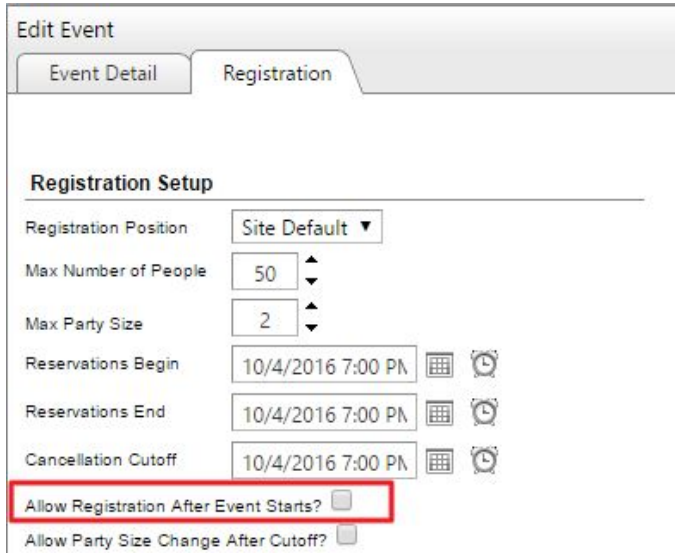
Reservations End: 10/4/2016 7:00 PM [calendar] [clock]

**Cancellation Cutoff: 10/4/2016 7:00 PM [calendar] [clock]**

Allow Registration After Event Starts?

Allow Party Size Change After Cutoff?

**Allow Registration After Event Starts:** allows users to sign up while the event is occurring.



**Edit Event**

Event Detail | Registration

**Registration Setup**

Registration Position: Site Default ▼

Max Number of People: 50 ▲▼

Max Party Size: 2 ▲▼

Reservations Begin: 10/4/2016 7:00 PM [Calendar] [Clock]

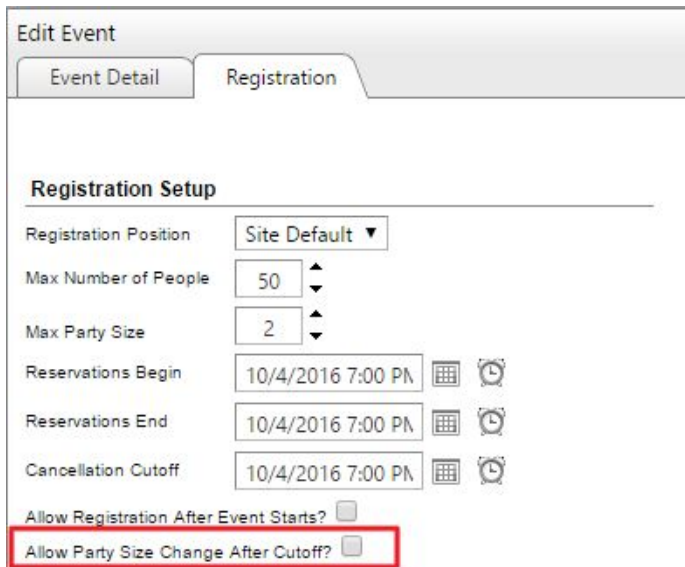
Reservations End: 10/4/2016 7:00 PM [Calendar] [Clock]

Cancellation Cutoff: 10/4/2016 7:00 PM [Calendar] [Clock]

Allow Registration After Event Starts?

Allow Party Size Change After Cutoff?

**Allow Party Size Change After Cutoff:** enables attendees to alter their party size at any time.



**Edit Event**

Event Detail | Registration

**Registration Setup**

Registration Position: Site Default ▼

Max Number of People: 50 ▲▼

Max Party Size: 2 ▲▼

Reservations Begin: 10/4/2016 7:00 PM [Calendar] [Clock]

Reservations End: 10/4/2016 7:00 PM [Calendar] [Clock]

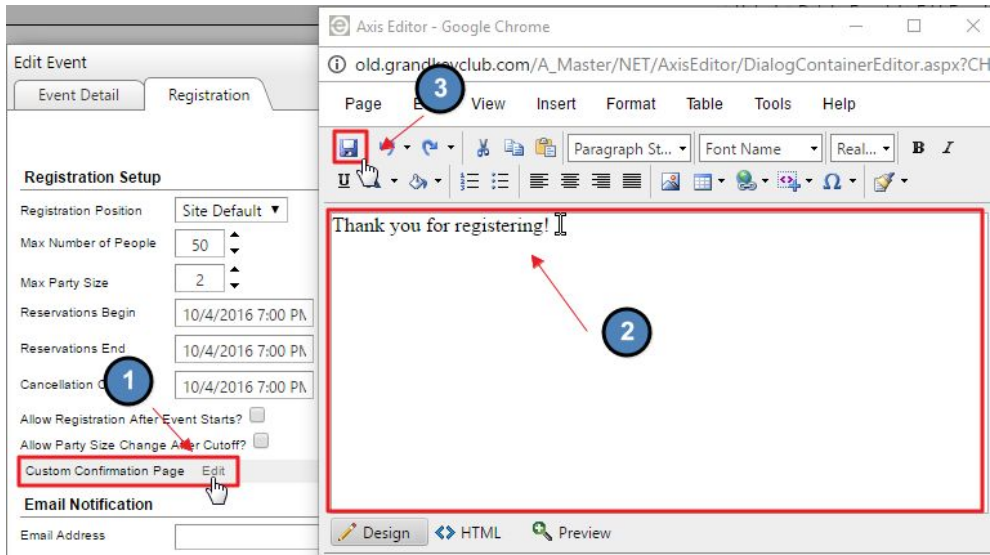
Cancellation Cutoff: 10/4/2016 7:00 PM [Calendar] [Clock]

Allow Registration After Event Starts?

Allow Party Size Change After Cutoff?

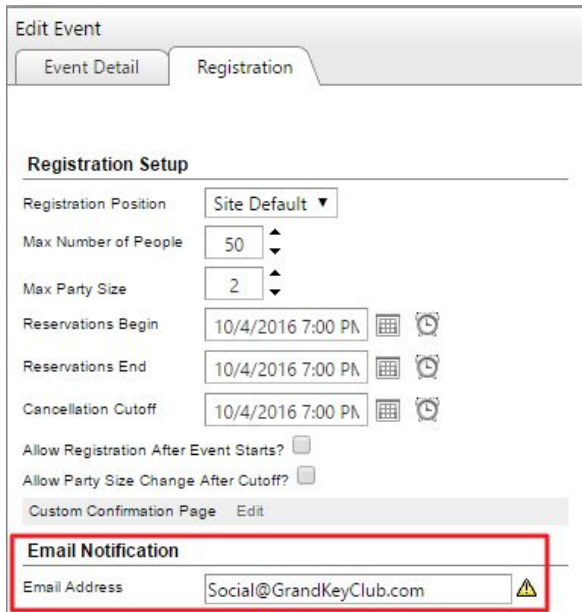
**Custom Confirmation Page:** allows for custom notification (simple message with text pop-up) once the attendee registers.

First, **click edit**. Add the desired verbiage, and **click save** in the editor to update.



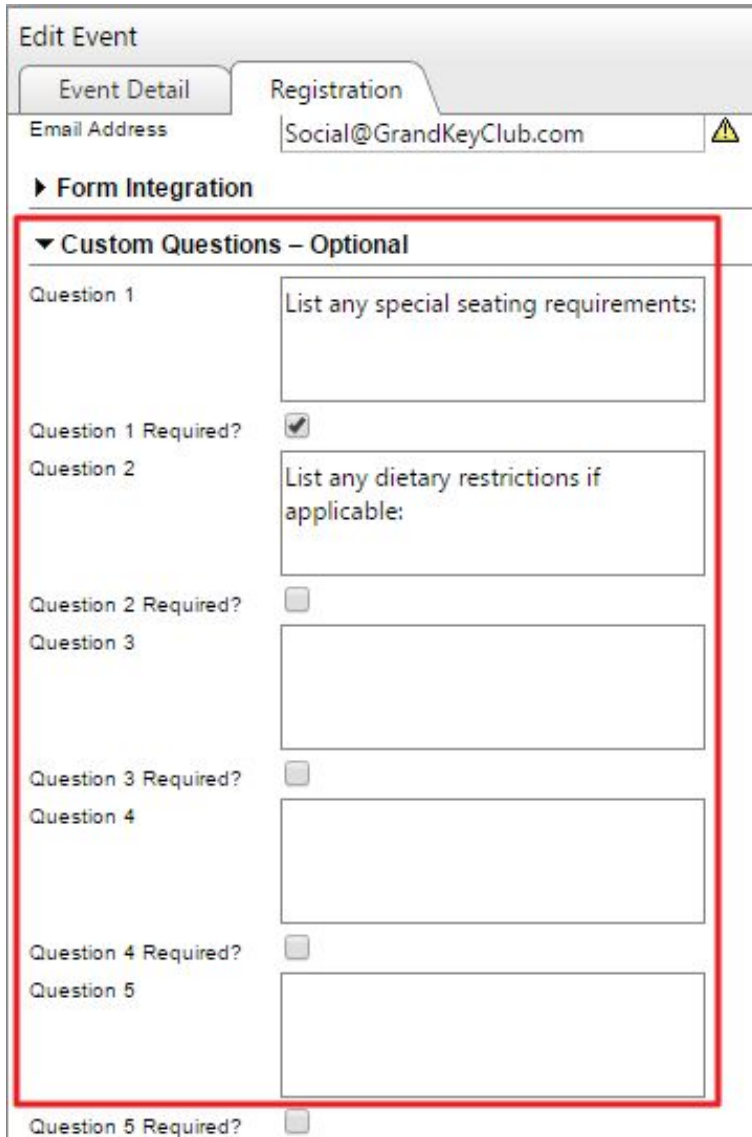
## Email Notification

The **Email Notification Field** must be populated to save and continue. This email will receive notifications when attendees register, change registration, or cancel their registration.




### Custom Questions

The **Custom Questions - Optional** section allows for up to 5 custom questions that may be used for specific needs for event. Examples include special seating arrangements, dietary restrictions, etc. Questions may be designated as required by clicking the **Question # Required** field, or can be optionally answered by leaving these fields blank.



**Edit Event**

Event Detail | Registration

Email Address: Social@GrandKeyClub.com 

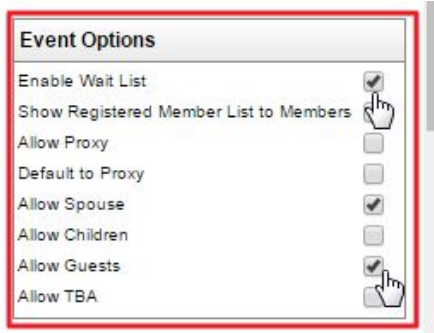
► Form Integration

▼ Custom Questions – Optional

Question 1	List any special seating requirements:
Question 1 Required?	<input checked="" type="checkbox"/>
Question 2	List any dietary restrictions if applicable:
Question 2 Required?	<input type="checkbox"/>
Question 3	
Question 3 Required?	<input type="checkbox"/>
Question 4	
Question 4 Required?	<input type="checkbox"/>
Question 5	
Question 5 Required?	<input type="checkbox"/>

## Event Options

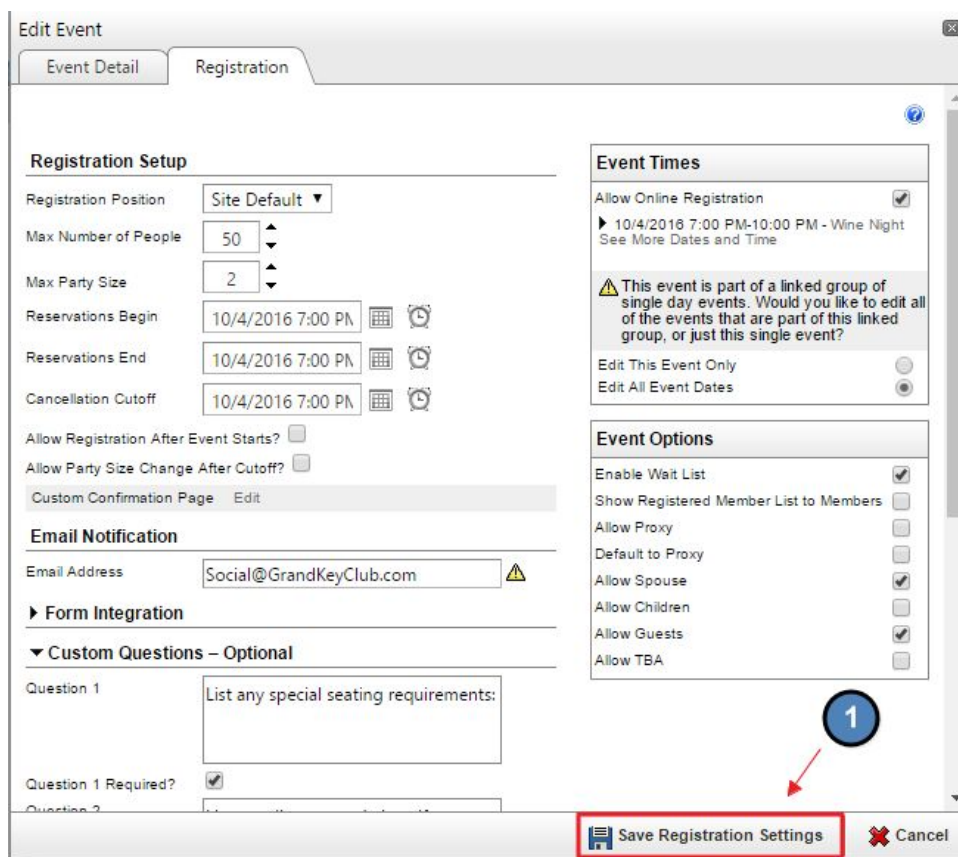
Additional parameters may be specified in the **Event Options** section.



- **Enable Wait List:** if the event is full, this will allow members to be added to a **wait list**.
- The **wait list** must be manually managed via the **Event Manager**. Managing the **wait list** will be covered in detail in the **Event Manager** section.
- **Show Registered Member List to Members:** allows members to see other members who are attending.
- **Allow Proxy:** member make reservations for other people, but the original member making the registration does not necessarily need to attend.
- **Default to Proxy:** every reservation made will be by proxy if this is enabled. Most frequently used for children's camps where the guardian is enrolling a child.
- **Allow Spouse, Children, Guest:** allows an attendee to register for others that may include a spouse, child, or guest.
- **Allow TBA:** a member may hold a reservation without the club knowing who the other attendee is.

## Save Registration

Once complete, click **Save Registration Settings** to finalize the registration tab.



### Step 3 - Final Event Details - Billing and Notification tabs

Once **Save Registration Settings** is selected, two new additional tabs appear.

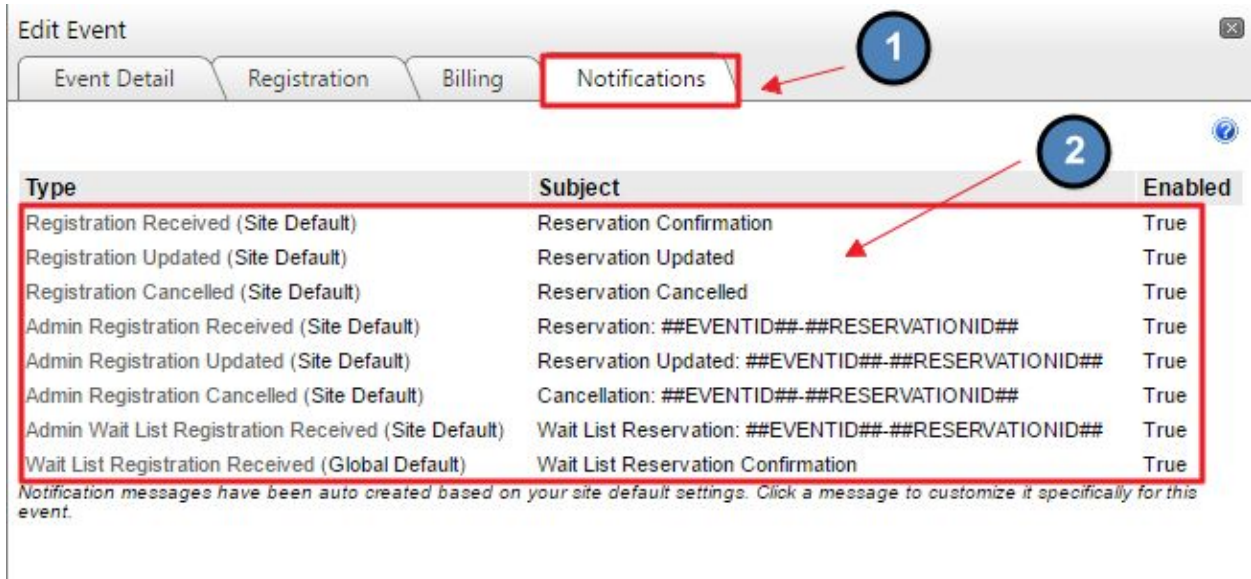
- 1) **Billing Tab:** Used by Clients also using Clubessential's Office Product. (Will not be covered in this document - for more information, please refer to Unification - Events found within the Clubessential Knowledge Base.)
- 2) **Notification Tab:** Used to create notifications for Events.

#### Notification Tab - Creating Notifications for Events

**Notifications** (in the form of email) may be added for attendees and administrators of the event, so that when certain actions relative to the event occur (registration is received, registration is updated, registration is cancelled, etc), an email notification is sent.

Click the **Notifications** tab to access notifications.

There are two types of notifications (1) Default, and (2) Custom. **Default Notifications** are listed on this tab, and contain standard language for use. When, enabled, these notifications will be utilized without need for intervention.



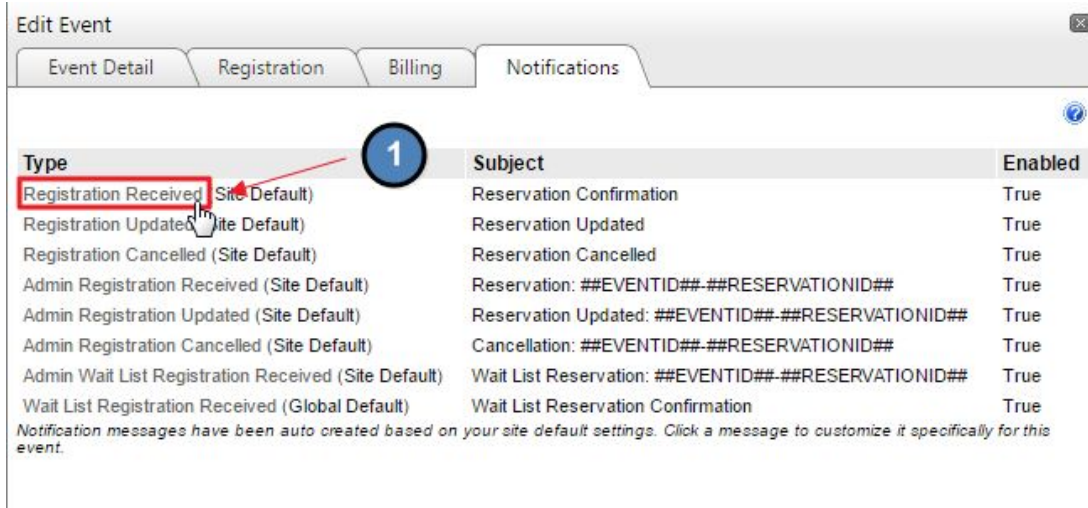
While customization of the default notifications is not required, **Custom** notifications may be helpful, for they allow for additional registration or cancellation information to be included, and also offer an opportunity to Cross Market other events.

There are four types of default **notifications** that may be customized:

- **Received**
- **Changed**
- **Cancelled**
- **Wait List**



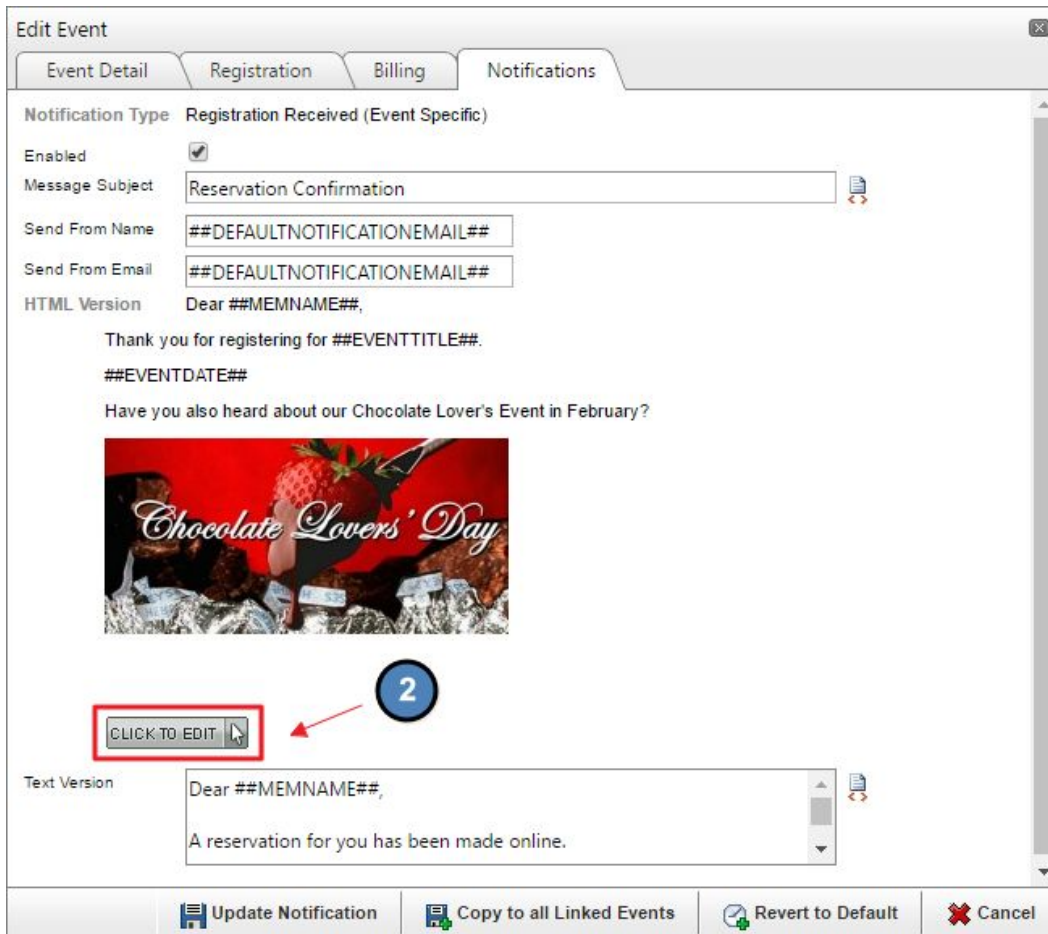
To customize a notification, **click the type of notification** to edit.



Type	Subject	Enabled
Registration Received (Site Default)	Reservation Confirmation	True
Registration Updated (Site Default)	Reservation Updated	True
Registration Cancelled (Site Default)	Reservation Cancelled	True
Admin Registration Received (Site Default)	Reservation: ##EVENTID## ##RESERVATIONID##	True
Admin Registration Updated (Site Default)	Reservation Updated: ##EVENTID## ##RESERVATIONID##	True
Admin Registration Cancelled (Site Default)	Cancellation: ##EVENTID## ##RESERVATIONID##	True
Admin Wait List Registration Received (Site Default)	Wait List Reservation: ##EVENTID## ##RESERVATIONID##	True
Wait List Registration Received (Global Default)	Wait List Reservation Confirmation	True

*Notification messages have been auto created based on your site default settings. Click a message to customize it specifically for this event.*

Open the **click to edit** to access the **Editor**.



Notification Type: Registration Received (Event Specific)


Enabled:

Message Subject: Reservation Confirmation

Send From Name: ##DEFAULTNOTIFICATIONEMAIL##

Send From Email: ##DEFAULTNOTIFICATIONEMAIL##

HTML Version: Dear ##MEMNAME##,  
 Thank you for registering for ##EVENTTITLE##.  
 ##EVENTDATE##  
 Have you also heard about our Chocolate Lover's Event in February?



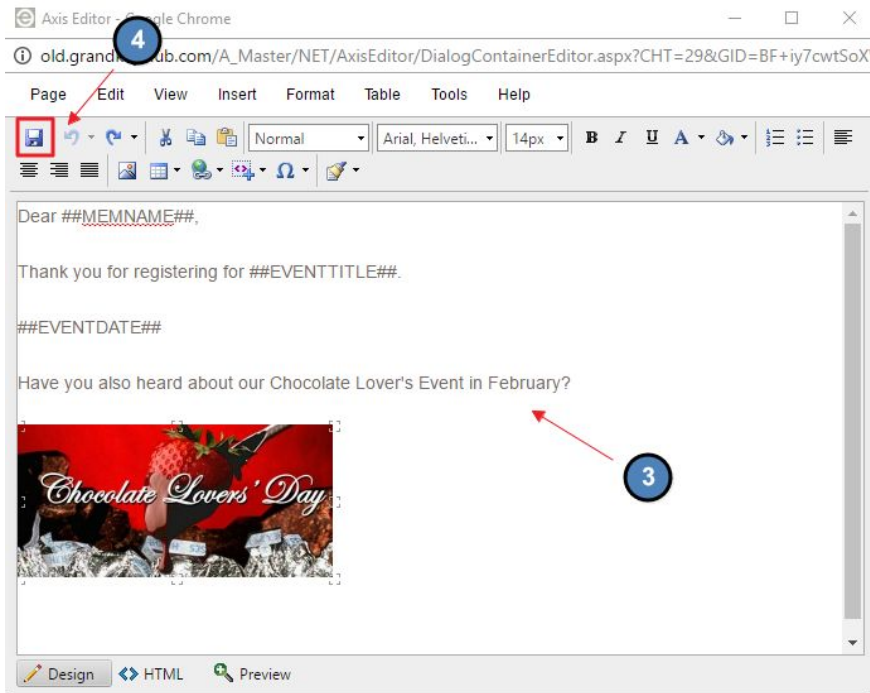
**CLICK TO EDIT**

Text Version: Dear ##MEMNAME##,  
 A reservation for you has been made online.

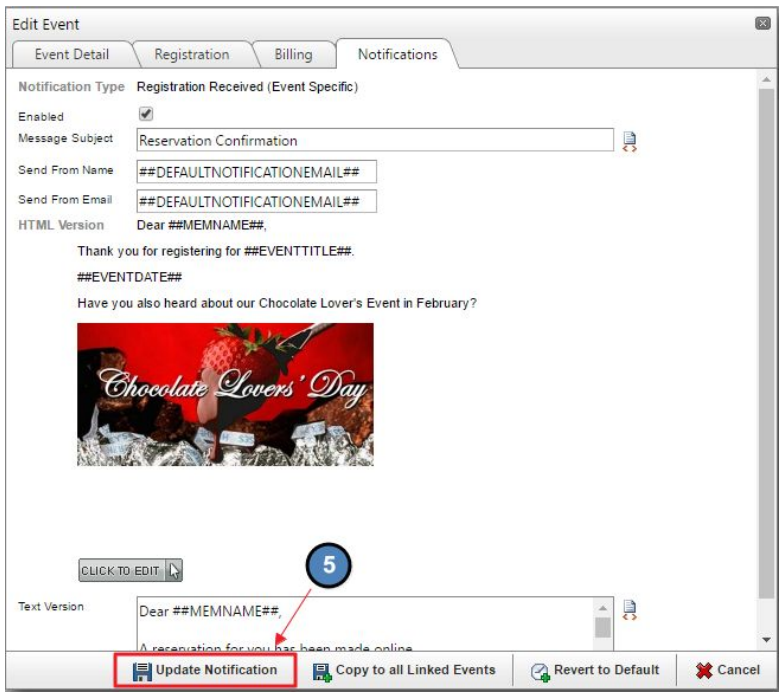
Update Notification | Copy to all Linked Events | Revert to Default | Cancel



Each **Notification** will open the **Editor** where the message may be customized using **snippets** and text. **Save** in the editor once complete.



Last, **click Create Notification** (the first time) or **Update Notification** subsequent times) to save in the **Notifications** tab.



## Step 4 - Save and Close Event

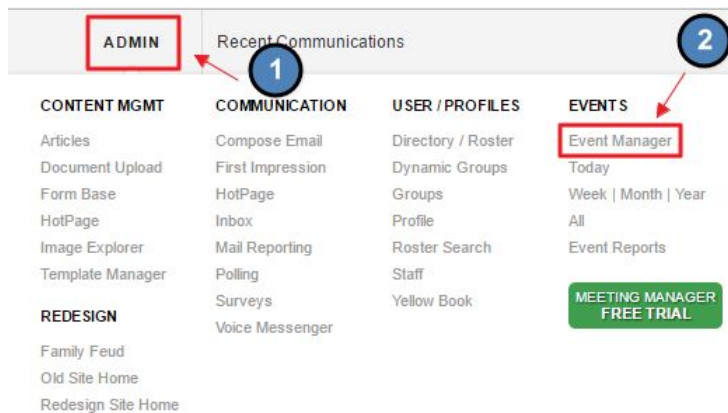
Once all information has been populated for the event, navigate to the **Event Detail** tab, and click **Save and Close**.



## Event Manager

The **Event Manager** allows for management of events that members can register for. Here, you may email event attendees, manage registrations and the **wait list**. Information on attendees may also be **exported** for further management offline. The **Event Manager** allows for one point of entry for all registrations, so there is no need to keep a separate book for registration details.

Only **Admins** may access the **Event Manager** by hovering over **Admin** in the left hand corner of the screen > **Event Manager**.



This will launch the **Event Manager** interface. The Event Manager provides a list of all upcoming events.

### EVENT MANAGER

Filters

Date Range:  to

Event Title:  Member Name, Email, or #:

Status:  Registration Allowed:  Grouping Code:

Categories:

Columns:  Status  Grouping Code  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	Grouping Code	Adults	Children	Total	Allowed	Date ^
<input type="checkbox"/>	Poker Tournament		15	1	16	100	9/28/2016 7:00 PM-11:00 PM
<input type="checkbox"/>	Morning Yoga Flow		0	0	0	20	10/3/2016 7:00 AM-8:30 AM
<input type="checkbox"/>	Wine Night		0	0	0	50	10/4/2016 7:00 PM-10:00 PM
<input type="checkbox"/>	Morning Yoga Flow		0	0	0	20	10/17/2016 7:00 AM-8:30 AM
<input type="checkbox"/>	Wine Night		0	0	0	50	10/18/2016 7:00 PM-10:00 PM
<input type="checkbox"/>	Poker Tournament		0	0	0	100	10/26/2016 7:00 PM-11:00 PM
<input type="checkbox"/>	Wine Night		0	0	0	50	11/1/2016 7:00 PM-10:00 PM
<input type="checkbox"/>	Morning Yoga Flow		0	0	0	20	11/7/2016 7:00 AM-8:30 AM
<input type="checkbox"/>	Morning Yoga Flow		0	0	0	20	11/14/2016 7:00 AM-8:30 AM
<input type="checkbox"/>	Morning Yoga Flow		0	0	0	20	11/21/2016 7:00 AM-8:30 AM

## Event Details

Event details allows action on each event and communication with registrants.

Click on the **Event Title** in the **Event Manager** to perform actions on a particular event.

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

<input type="checkbox"/>	Title	Grouping Code	Adults	Children	Total	Allowed	Date ^
<input type="checkbox"/>	<b>Poker Tournament</b>		15	1	16	100	9/28/2016 7:00 PM-11:00 PM

This will launch the **Event Details** for that particular event.

### EVENT DETAILS

[« Event List](#) [Edit Event](#) | [Event Notifications](#) | [View Event](#) | [Email Registrants](#) | [Send Voice Message](#) | [Print](#)

Event: Poker Tournament  
 Date: Wednesday, September 28, 2016 7:00 PM-11:00 PM  
 Maximum Allowed: 100 Total Booked: 16 Spaces Available: 84

View:

[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#:

<input type="checkbox"/>	Confirm	Name ^	Email	Adults	Children	Reserved By	Create Date
<input type="checkbox"/>	3706435-2278929	Able, Matthew Mem: MAI3000	demo@clubessential.com	0	1	Emily Latham	9/27/2016 11:05 AM
<input type="checkbox"/>	3706435-2278919	Adams, John Mem: WDI000045	demo@clubessential.com	2	0	Emily Latham	9/27/2016 11:03 AM

The top toolbar offer various tools for interacting with the event:



- **Edit Event:** goes back to the calendar interface so event details may be edited.
- **Event Notifications:** opens the **Event Notifications** to edit or add custom notifications. Same interface that is used when first setting up the event and using the **Notifications Tab**.
- **View Event:** shows the event in the calendar
- **Email Registrants:** allows direct communication with registrants via email.
- **Send Voice Message:** this is an add-on service for an additional fee. This is mostly used for cases of emergency.
- **Print:** prints Event Details page

**Registration Menu Bar:** allows additions of registration by administrators. Admins may make registrations for club members directly by using this tool.



- **Add Registration:** register Member(s) for an Event
- **Export Reservation Listing:** export the listing to a CSV file which shows: registrants, attendees, and notes by registrant. One row for each registration received, listed by registration owner.
- **Export Attendee Listing:** export the listing to a CSV file which shows: each attendee on a row. You may add which fields show on this export.
- **Export Guests:** export the listing of Guests to a CSV file.
- **Add Attendees to Group:** manually add attendees to the event.
- **View in Custom Report:** launches the export interface, but allows you to choose fields to export.
- **View:** may choose which information is shown in the **Event Manager** for: active, cancelled and **Wait List**.
- **Show More Info:** displays notes entered by the member or the admin.
- **Click Here to Perform Actions:** allows the admin to change the reservation. This is used to move registrants from the **wait list** to **active**, or to cancel a reservation.
- **Search by Name, Email, or Mem#:** search for existing reservations by Name, Email, or Member number.

## Add Registration: Help Member(s) Register for an Event

In the event a Member calls in or stops by, and would like help registering for an Event, utilize the **Event Manager** to help get them registered for the event.

First, scroll to find the appropriate event. Then, click on the **Event** to launch the **Admin Registration** window.

### EVENT MANAGER



Filters

Date Range: 9/28/2016 to 11/27/2016

Event Title: **Movie Night** Member Name, Email, or #

Status: All Registration Allowed: Yes

Categories: All

Columns:  Status  Registration Allowed  Registration Numbers  Type  Categories

Refresh

Click here to Perform Action(s) Custom Reports | Export Event Listing | Export A

Title	Adults	Children	Total	Allowed	Date
<input checked="" type="checkbox"/> <b>Movie Night</b>	0	0	0	50	10/13/2016 7:30 PM-11:00 PM
<input type="checkbox"/> Movie Night	0	0	0	50	10/27/2016 8:00 PM-10:00 PM

Next, click **Add Registration** to launch the Registration screen.



Event: **Movie Night**

Date: Thursday, October 13, 2016 7:30 PM-11:00 PM

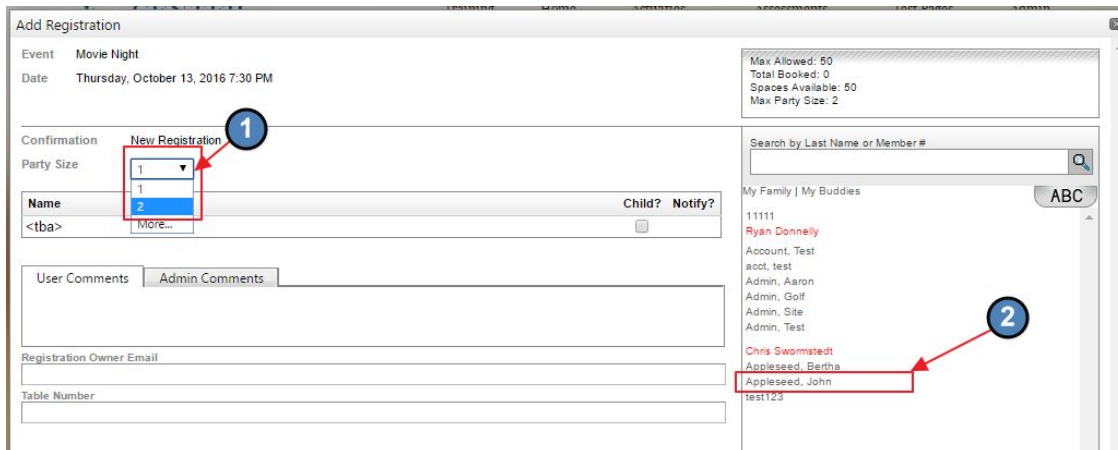
Maximum Allowed: 50 Total Booked: 0 Spaces Available: 50

**Current / Active Reservations** Click column headers to sort

**Add Registration** | Export Reservation Listing | Export Attendee Listr

Begin by designating **Party Size**. For this example, let's assume the party size is two, and that the member will be bringing their spouse.

Next, select **Member(s)** from the right side of the screen by double-clicking on them.



Add Registration

Event: **Movie Night**

Date: Thursday, October 13, 2016 7:30 PM

Confirmation: **New Registration**

Party Size: 2

Name: <tba> Child? Notify?

User Comments: Admin Comments

Registration Owner Email

Table Number

Max Allowed: 50  
Total Booked: 0  
Spaces Available: 50  
Max Party Size: 2

Search by Last Name or Member #

My Family | My Buddies

11111  
Ryan Donnelly  
Account, Test  
acct, test  
Admin, Aaron  
Admin, Golf  
Admin, Site  
Admin, Test

Chris Swomstedt  
Applesed, Bertha  
**Applesed, John**  
test123

Click **+spouse** to indicate Member will be bringing their spouse. Note that Child, or Guest could also be clicked to populate second attendee.

Add Registration

Event Movie Night  
Date Thursday, October 13, 2016 7:30 PM

---

Confirmation New Registration

Party Size

Name		Child?	Notify?
× Appleseed, John / 123456(0)	+spouse   +child   +guests	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<tba>		<input type="checkbox"/>	

Once attendees have been specified, populate additional fields, such as Registration Owner Email and preferred Table Number if appropriate. If email address is already on file in Member's profile, email will auto-populate.

Name	Child?	Notify?
× Appleseed, John / 123456(0)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
× Appleseed, Bertha / 123456(1)	<input type="checkbox"/>	<input checked="" type="checkbox"/>

User Comments Admin Comments

Registration Owner Email  
jappleseed@ce.com

Table Number

Once complete, click, **Save Registration** at the bottom of the screen.

 Save Registration 

Registration will then appear in the Event details.



## Managing the Wait List

The **Wait List** can easily be managed within the **Event Manager**. Once attendees cancel their reservation and spaces are available, click the **event title** to view the **Event Details**. From here, we can manage moving those on the **Wait List** to an **active registration**.

**Click** the dropdown on the **View Interface**, and change to **Wait List**. This will show all members on the current **Wait List**.



**Check** the box next to the member's name.

Event      Poker Tournament  
 Date      Wednesday, September 28, 2016 7:00 PM-11:00 PM  
 Maximum Allowed: 100   Total Booked: 15   Spaces Available: 85   Wait List: 1  
**Wait List Reservations** *Click column headers to sort* View: **Wait List**  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#

<input type="checkbox"/>	Confirm	Name ^	Email	Adults	Children	Reserved By	Create Date
<input checked="" type="checkbox"/>	3706435-2278922 Wait List	Ivers, Kate Mem: kk1000	kivers@clubessential.com	1	0	Emily Latham	9/27/2016 11:04 AM <a href="#">Toggle Scrollbars</a>

A screenshot of a table with columns: Confirm, Name, Email, Adults, Children, Reserved By, Create Date. The first row is highlighted, and a red box highlights the 'Confirm' column header and the first row. A blue circle with the number '2' and an arrow points to the checkbox in the first row.

Next, **click** the **Click here to Perform Actions** link > **Make Selected Reservations Active**. This will then allow the member to be on the **active registration list**. **Note:** you will need to email the wait listed attendee to notify that they are now on active reservation.

[Add Registration](#) | [Export Reservation Listing](#) | [Export Attendee Listing](#)

↑ [Click here to Perform Action\(s\)](#)

**Make Selected Reservations Active**

<input type="checkbox"/>	Confirm	Name ^	Email
<input checked="" type="checkbox"/>	3706435-2278922 Wait List	Ivers, Kate Mem: kk1000	kivers@clubessential.com

A screenshot of the same table as above, but with a red box highlighting the 'Click here to Perform Action(s)' link and the 'Make Selected Reservations Active' button. A blue circle with the number '1' and an arrow points to the checkbox in the first row, and another blue circle with the number '2' and an arrow points to the 'Make Selected Reservations Active' button.

## FAQs

**Q:** I need to create a recurring event, but the event I have created lists all days on the single event.

**A:** You have probably created a **Multi-Day Event** by which attendees must attend to ALL event days / times. Instead, create a **Single Day Event** and add information for the first event. Once you save to continue, the **Clone Linked Events** option will appear where you may add additional days for the event to occur on.

## Best Practices

1. Using online registration and the **Event Manager** is an easy way to keep all reservation information in one place. There is no need for offline management when using the system in place on the website. It is also easy to communicate with attendees by using the blast email system on the website.
2. If an event is a recurring event, remember to use the **Single Day Event** but make this a **Cloned Linked Group of Events**. If the event is added as a **Multi-Day Event**, then the attendee must go to ALL events.
3. Customizing notifications on events is a great place to add **cross marketing**. This also allows for notifications to be customizable using **Snippets** or to add additional information that attendees may need to know.