CLUBESSENTIAL

Calendar Utilization Webinar
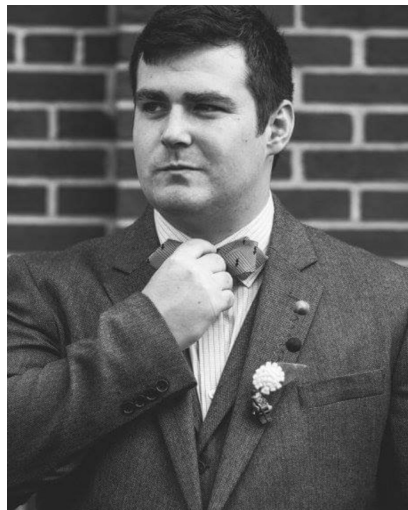
January 2021

Ask a Question at Any Time!

Questions will be addressed throughout of the webinar.

Kim Saunders

Josh Morrison

Agenda

- Creating Event Items in Back Office/CMA

- Creating Single & Multi-Day Events

- Setting-up Online Registration

- Using Event Notifications

- Member Payment Options for Events

- Mobile POS Check-in for Events

- Managing Events through Event Manager

- Questions & Answers

The Importance of Your Club Calendar

Your **Club Calendar** is an extremely effective tool for advertising club events and keeping your members engaged and involved in Club activities. When members can quickly see what's going on at the Club, ascertain the details, and conveniently register themselves and their guests for an event, they're more likely to consider participating in events they may have otherwise glossed over in the past. Members love being autonomous and in control of their commitments; having your **Club Calendar** and **Event Registration** at their fingertips satisfies a big market demand.

Join us for our Monthly Wine Tasting Event
First Friday of Every Month
In the Grill Room
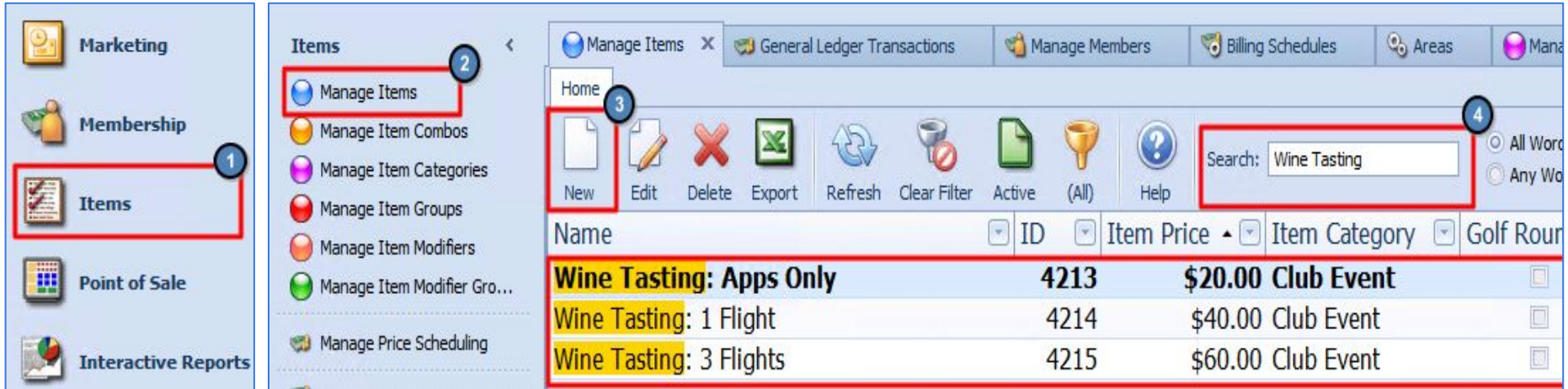**From 7:00 - 9:00 PM**

Appetizers Only - $20 a person
Apps + 1 Flight of Wine - $40 a person
Apps + 3 Flights of Wine - $60 a person

Plan Your Event & Define Your Items

- Determine the unique price points for your event

- Define each unique price point as an Item in CMA

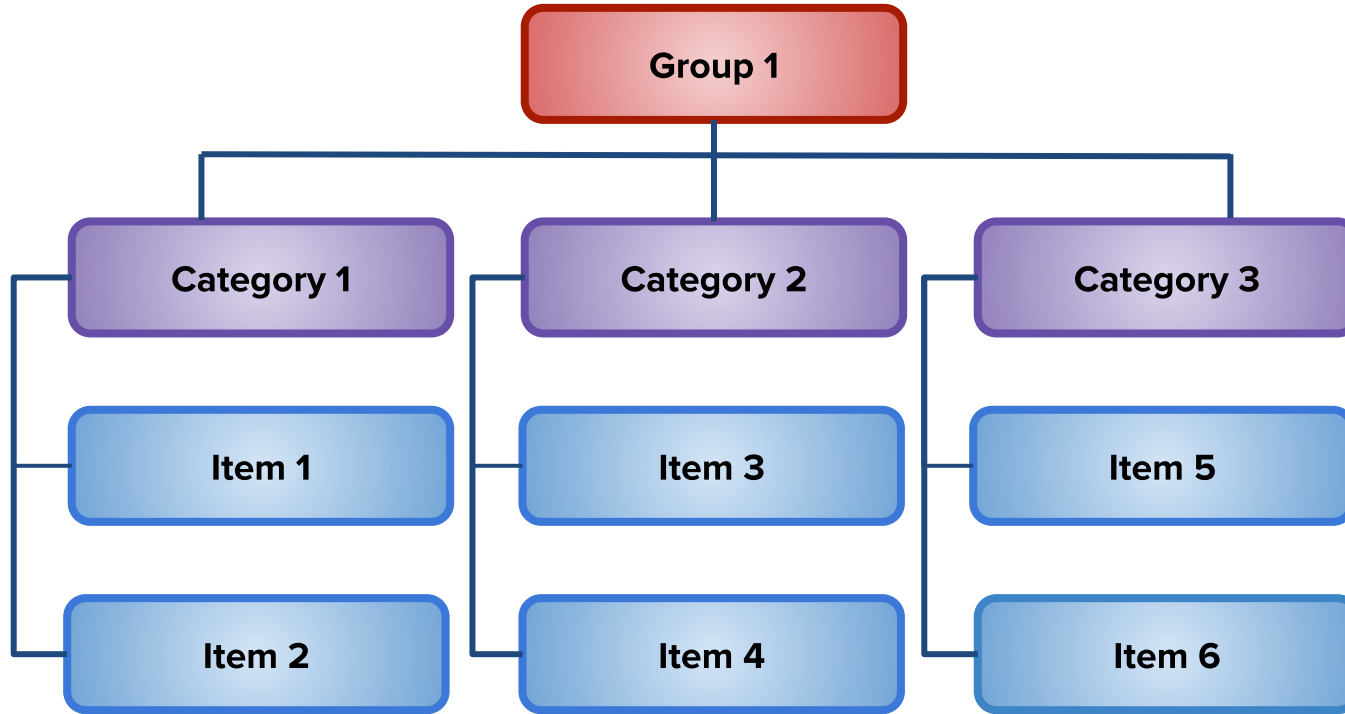- Creating your Items in CMA will allow you to integrate your Event throughout your entire Product Suite

Create Your Items in CMA

- Click on the **Items** Module in CMA
- Select **Manage Items** within the Module
- Use the **New** icon to create new items; Use **Search** to search for existing items

Item Hierarchy

Manage Item Groups

Manage Item Categories

Manage Items

Group 1

Category 1

Category 2

Category 3

Item 1

Item 3

Item 5

Item 2

Item 4

Item 6

Review Your Items Within the Item Category
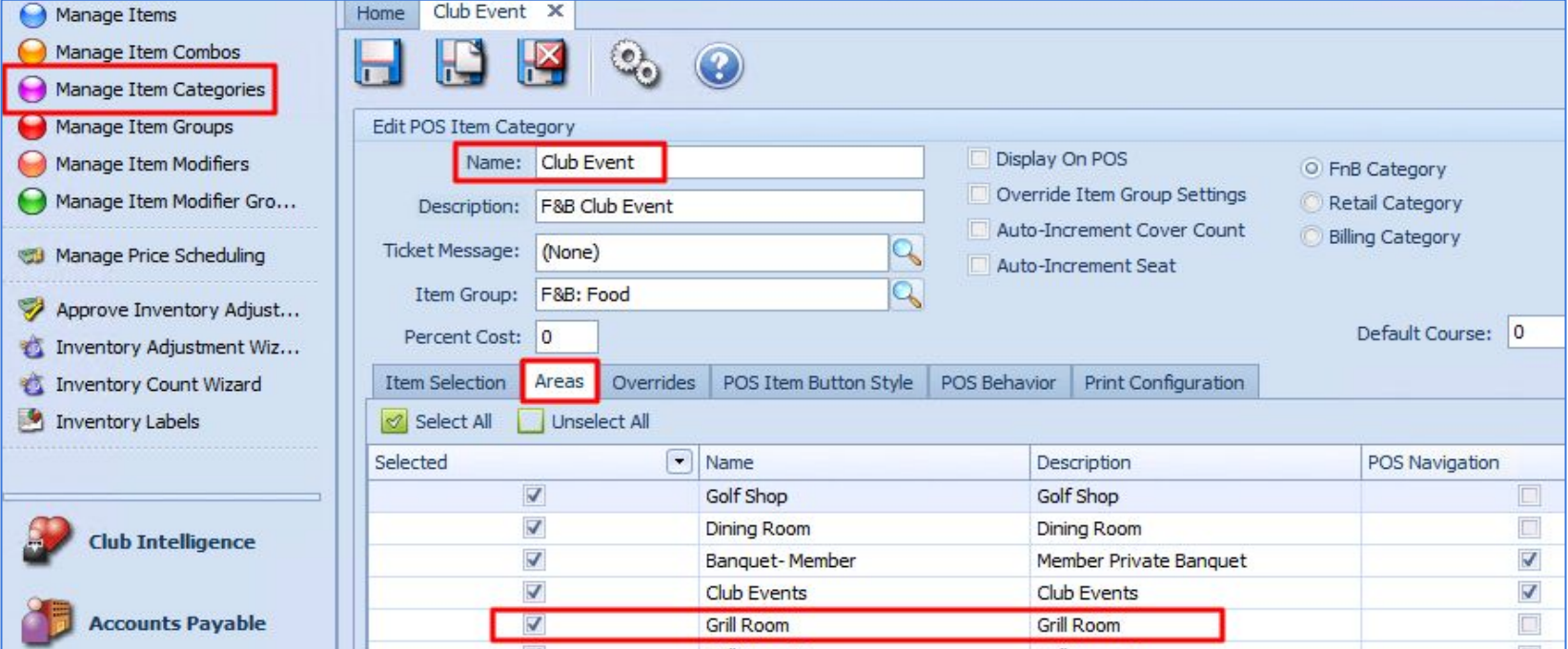
- Select **Manage Categories** within the Items Module

- Find your specific **Item Category** within the list of Categories and double click on it to open the Category details.

- Validate that your items appear within the **Item Selection** tab.

Review Your Event Area Within the Item Category

● Navigate to the **Areas** tab within your **Item Category** details and ensure that the Area that will be used to host your Event is selected.
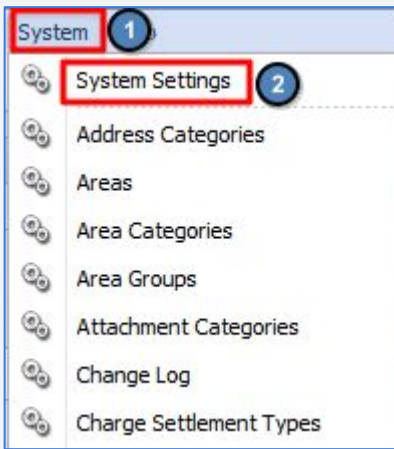
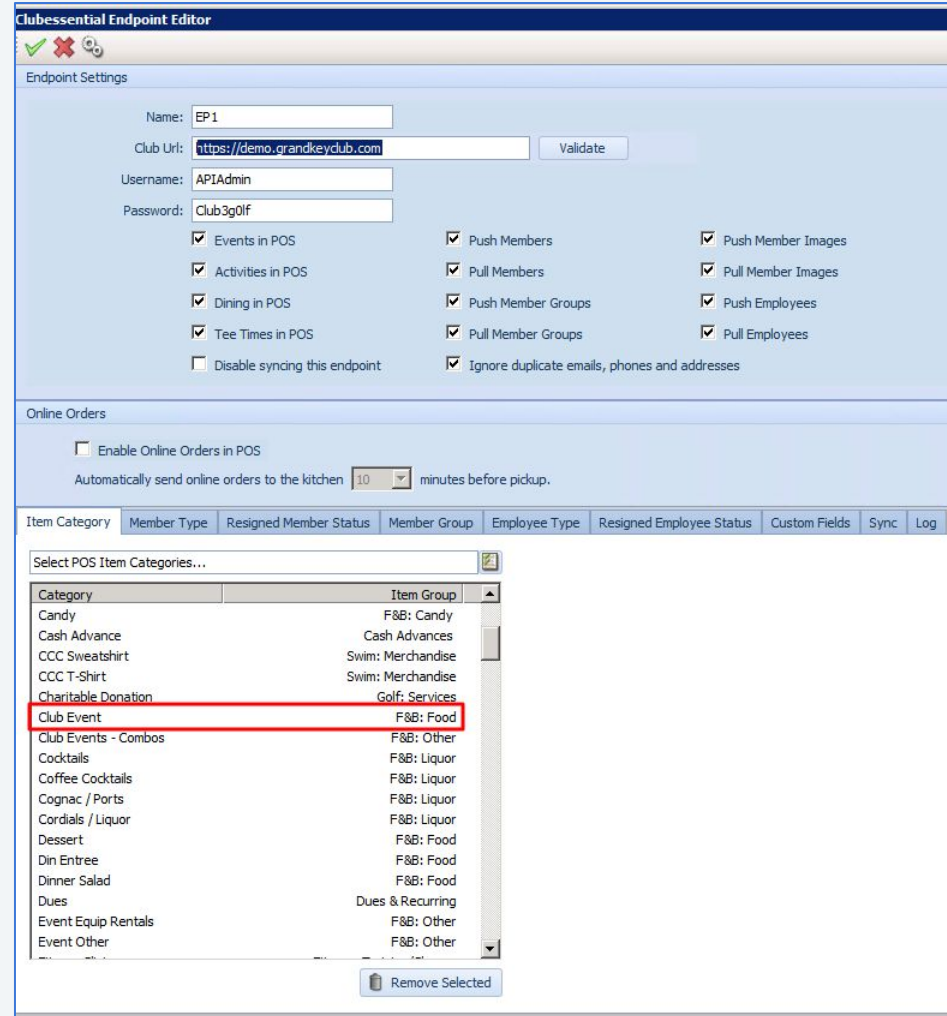## Sync Your Items from CMA to Your Website

- Navigate to **System**, then **System Settings**

- Select **Web Site** from the System Settings dropdown

- Select your **Club Web Site**

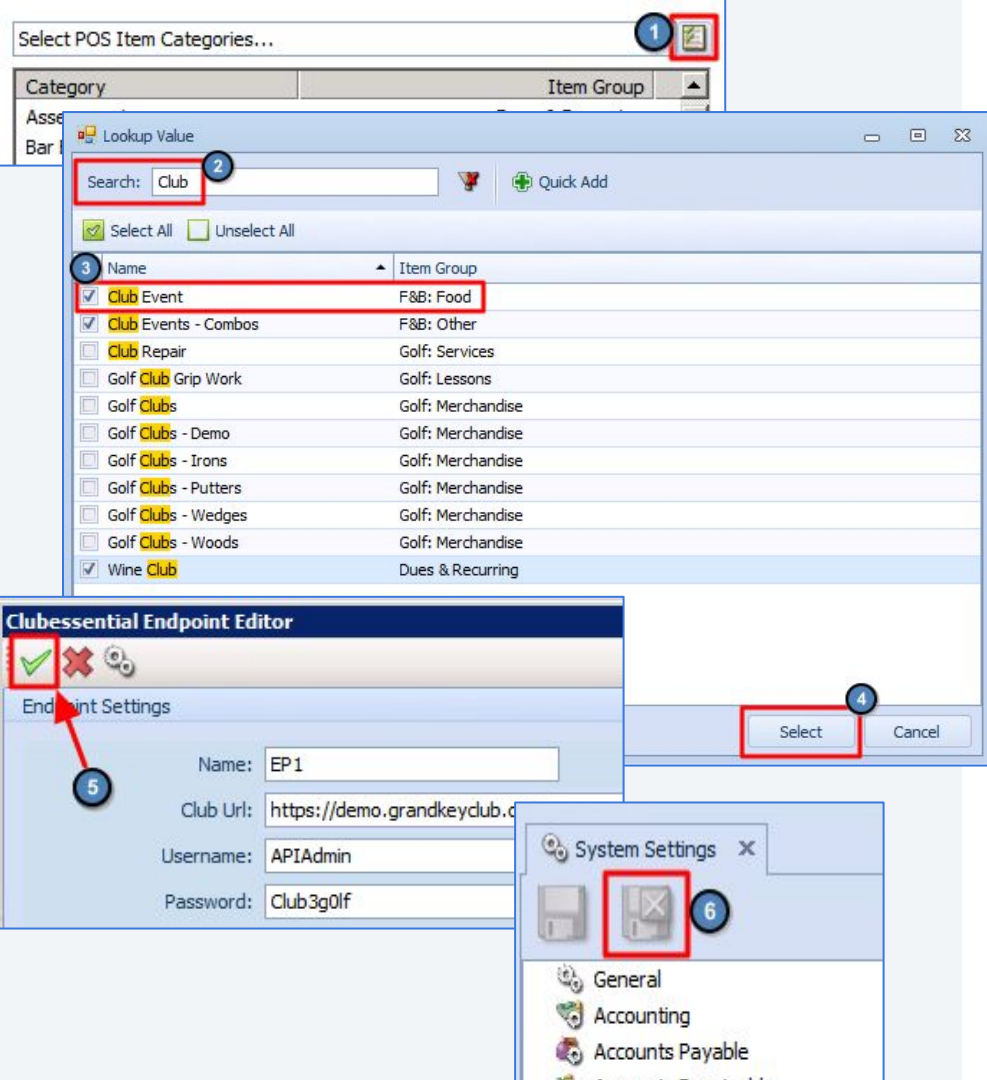- Double click on the **URL** of your Club's Site to open the Endpoint Editor

Validate Your Endpoint Settings

- Ensure that the **Item Category** for your Event is included in the Item Categories set to sync to your Website.

- Here you can see that our **Club Events Item Category** is already included in the Categories syncing to our Grand Key Club Demo Site.

Add Categories to be Synced

- If your **Item Category** is not already syncing, add it by clicking the **List Icon** next to Select POS Item Categories.
- **Search** for your Item Category
- Click the **Checkbox** next to your Item Category
- Click **Select** to apply your changes
- Save your changes by clicking **Accept Changes** (the green checkmark) within the Endpoint Editor
- Save and Close **System Settings**

Viewing & Accessing Club Calendar

Accessible from a variety of locations. Under Events in the Admin Toolbar, within the site navigation, and even links on the home page.

Calendar Options

- **Add Single Day Event** - Single and recurring events will be created here.
- **Add Multi Day Event** - Create an event that spans multiple days such as a Golf Tournament. One registration for the entire event.
- **Add Personal Event** - This allows members to create a reminder that only they will see on the website calendar
- **Export Calendar** - Export events and sync with one of your personal calendars.
- **Printable Version** - Print entire calendar. Opens new tab with print options.

Changing views and filters
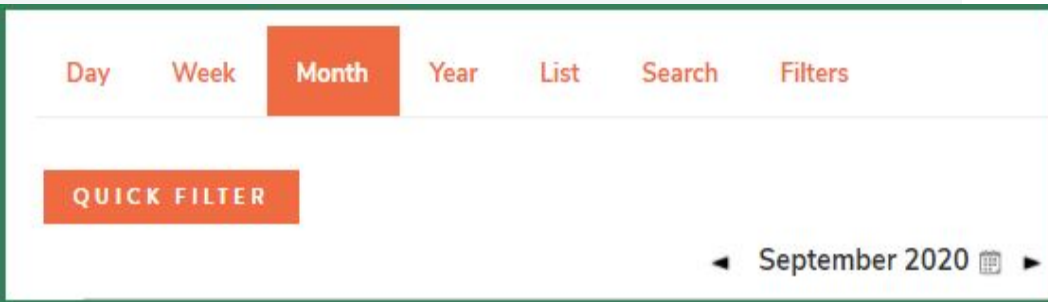
- **Calendar Views -** List, Day, Month, Year. Ability to view Calendar in different formats
- **Search Tab** - Search for specific events using the event title and date range.
- **Filters** - Create your own filter for viewing specific groups of events based on interest area.
- **Quick Filter** - Available when viewing the main club calendar. Use to narrow down which events are shown

Additional Calendar Notes of Interest

- **No icon** - Registration is not available for an event.
- **Red Icon (not filled)** - Registration is not yet open.
- **Red Icon (filled)** - Event is closed. Either registration has passed or the event has passed.
- **Green Icon (not filled)** - Available to register.
- **Green Icon (filled)** - Event that you (from the members point of view) have registered for.
- **Yellow Icon** - currently on the waitlist.

Creating Single Day Event Details

- **Event Title** - Name of the event.
- **Event Color** - Color that your event will appear as on the calendar.
- **Event Summary** - Short description of the event
- **Event Area** - Area where the event will take place. Used with Billing.
- **Event Status** - Used to control who can see the event.
  - **Published -** the event will be fully accessible to members
  - **Unpublished -** the event will be accessible to Admins but not to members
  - **Hidden Registration -** members can't register themselves for the Event but Admins can register members
- **Title Position -** Where title is on event flyer
- **Clickable Event** - keep checked if the event is one that a member may register for.
- **Allows Members to Email Event** - Members can email Admins on event

Additional Event Details

Categories - The interest areas that your event will fit under. Can be a single interest area or multiple.

External Event Flyer - Only used if you want members redirected to a page outside of the website.

Event Thumbnail - Controls which picture will be displayed in a calendar plugin. (Such as homepage)
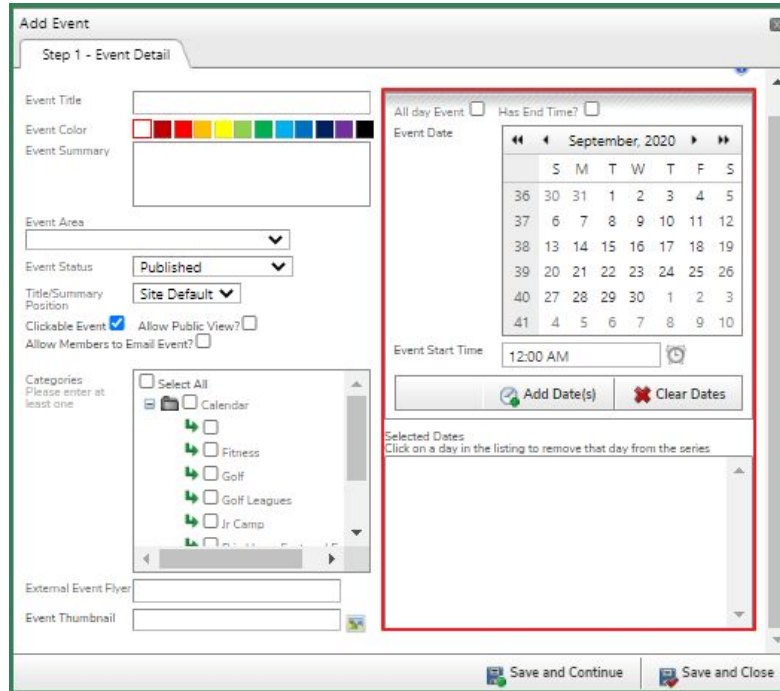
Selecting Date and Time

1. **All day Event** - Removes end time since the event will be "all day".
2. **End Time** - Select when the event will end.
3. **Clock Icon** - Select the start and end times or simply type in the box manually.
4. **Calendar** - Select a date for your event. In the event of a recurring event, simply select the first date.

Multi-Day Events

When creating, you must select multiple days. Remember, there is only **ONE** registration for the entire event.

Additional Event Details After Saving

- **Clone the Single Day Events** - recurring event such as a fitness class, or golf lessons.
- **Radio Buttons** - determine whether an edit you are making will only affect:
    - specific event
    - all events
    - specific event and unlink it
- **Edit Flyer** - use the new or old editor to create a beautiful flyer for your event

Enabling Registration & Registration Options

- **Allow Online Registration** - causes the rest of the options to appear
- **Flyer Location Dropdown** - Above, below, or both
- **Max Number of People** - For the whole event
- **Days and Hours** - Set the time when reservations can be made and when those reservations can be cancelled.
- **Allow Registration After Event Starts?** - for both members and admins
- **Custom Confirmation Page** - Custom page upon registering

Registration Details & Additional Options

Email Notification - Email(s) that submissions will be sent to

Form Integration - After registering, members are taken to one of your Formbase forms.

Custom Questions - Optional - Allows for up to 5 custom questions that may be used for specific needs for an event.

Who Can Register?

- **Enable Wait List** - Sign up for the event even after it is full.
- **Allow Proxy**
- **Default to Proxy** - Members can register other members for the event and remove themselves from the reservation.
- **Allow Spouse**
- **Allow Children** - Must be clicked in order for members with those relationship designations to be registered
- **Allow Guests** - Members can register non-members to events.
- **Allow TBA** - Sign up for an event with placeholder spots for their party.

Enabling Billing and Adding Fee Types

(1)

Event

| Event Detail | Registration | Billing | Notifications |

Event Times

(2) Enable Billing ☐

▶ 12/4/2020 7:00 PM-9:00 PM - Monthly Wine Tasting
10/2/2020 7:00 PM-9:00 PM - Monthly Wine Tasting
11/6/2020 7:00 PM-9:00 PM - Monthly Wine Tasting
2/5/2021 7:00 PM-9:00 PM - Monthly Wine Tasting
3/5/2021 7:00 PM-9:00 PM - Monthly Wine Tasting
4/2/2021 7:00 PM-9:00 PM - Monthly Wine Tasting
5/7/2021 7:00 PM-9:00 PM - Monthly Wine Tasting
Hide Additional Dates and Times

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(3)

| Event Detail | Registration | Billing | Notifications |

Load From Template

Template [No Template ▼]

Existing Fee Types

Name	Value	Inventory
X Wine Tasting: Apps Only	$20.00	-

Fee Assignment

Primary	No Fee Assigned ▼	☐
Spouse	No Fee Assigned ▼	☐
Child	No Fee Assigned ▼	☐
Adult Guest	No Fee Assigned ▼	☐
Child Guest	No Fee Assigned ▼	☐
TBA	No Fee Assigned ▼	☐

Check the box at right to allow members to select fee type when making a reservation

Event Times

Enable Billing ☑
▶ 12/4/2020 7:00 PM-9:00 PM - Monthly Wine Tasting
See More Dates and Time

Add New Fee Type

(4) Group
F&B: Food ▼

(5) Category
Club Event ▼

(6) Item
Wine Tasting: Apps Only ▼

Inventory
0

Value
$20.00

(7) 💾 Save   ✖ Cancel

---

(8)

| Event Detail | Registration | Billing | Notifications |

Load From Template

Template [No Template ▼]

Existing Fee Types

Name	Value	Inventory
X Wine Tasting: 1 Flight	$40.00	-
X Wine Tasting: Apps Only	$20.00	-

Fee Assignment

Primary	No Fee Assigned ▼	☐
Spouse	No Fee Assigned ▼	☐
Child	No Fee Assigned ▼	☐
Adult Guest	No Fee Assigned ▼	☐
Child Guest	No Fee Assigned ▼	☐
TBA	No Fee Assigned ▼	☐

Check the box at right to allow members to select fee type when making a reservation

Event Times

Enable Billing ☑
▶ 12/4/2020 7:00 PM-9:00 PM - Monthly Wine Tasting
See More Dates and Time

Add New Fee Type

(9) Group
F&B: Food ▼

(10) Category
Club Event ▼

(11) Item
Wine Tasting: 1 Flight ▼

Inventory
0

Value
$40.00

(12) 💾 Save   ✖ Cancel

---

(13)

| Event Detail | Registration | Billing | Notifications |

Load From Template

Template [No Template ▼]

Existing Fee Types

Name	Value	Inventory
X Wine Tasting: 1 Flight	$40.00	-
X Wine Tasting: 3 Flights	$60.00	-
X Wine Tasting: Apps Only	$20.00	-
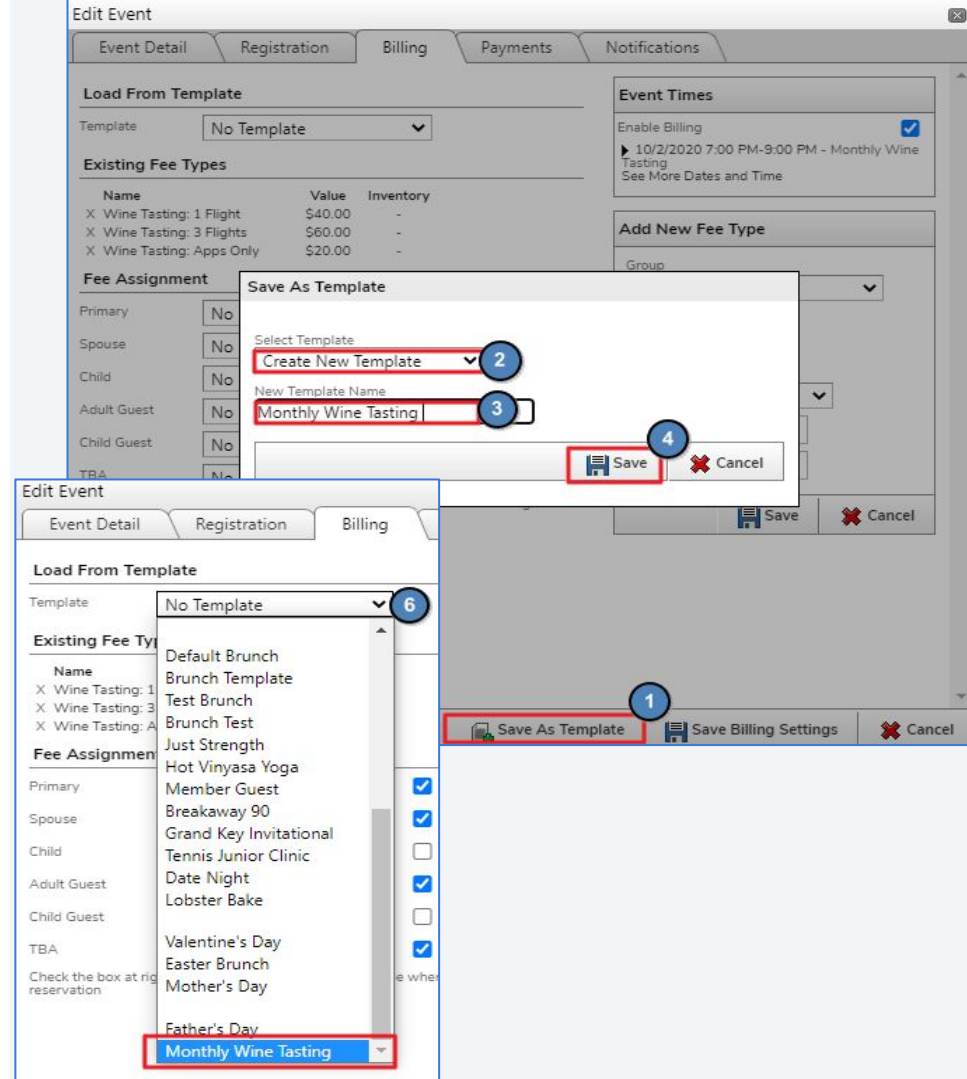
Fee Assignment

Primary	No Fee Assigned ▼	☐
Spouse	No Fee Assigned ▼	☐
Child	No Fee Assigned ▼	☐
Adult Guest	No Fee Assigned ▼	☐
Child Guest	No Fee Assigned ▼	☐
TBA	No Fee Assigned ▼	☐

Check the box at right to allow members to select fee type when making a reservation

Event Times

Enable Billing ☑
▶ 12/4/2020 7:00 PM-9:00 PM - Monthly Wine Tasting
See More Dates and Time

Add New Fee Type

(14) Group
F&B: Food ▼

(15) Category
Club Event ▼

(16) Item
Wine Tasting: 3 Flights ▼

Inventory
0

Value
$60.00

(17) 💾 Save   ✖ Cancel

Setting Up an Event with Member Fee Selection

- Use dropdown next to each relationship to set the default fee assignment.

- If members will have a choice of items, make sure to check the box next to the dropdown.

Billing Templates

- If you anticipate using your Fee Types and Fee Assignments for future Events, you can save them as a Template instead of having to re-create them from scratch

- To do this, use the **Save As Template** option at the bottom of the modal

- Select **Create New Template** under the **Select Template** dropdown

- Give your template a name and click **Save**

- The next time you are setting up an Event with similar Billing Settings, use the **Load From Template** option instead of adding each item one by one

Introduction to Notifications Tab

Type
Registration Received (Site Default)
Registration Updated (Site Default)
Registration Cancelled (Site Default)
Wait List Registration Received (Site Default)
Admin Registration Received (Global Default)
Admin Registration Updated (Global Default)
Admin Registration Cancelled (Global Default)
Admin Wait List Registration Received (Global Default)

- **Site Default** - Default notifications for every event can be changed via Admin bar
- **Registration Received** - Email sent when registration is made.
- **Registration Changed** - Sent when party size or questions are updated.
- **Registration Cancelled** - Sent when reservation is cancelled.
- **Waitlisted** - Sent to members when registering and placed on waitlist.
- **Click on Type name to edit.**

Updating Event Specific Notifications

Update Subject line, View Preview, and edit the email from this window. Select **Create Notification** to change to **Event Specific** notification. Use **Click To Edit** to use the legacy editor or **Click To Edit - New** to utilize the New Editor.
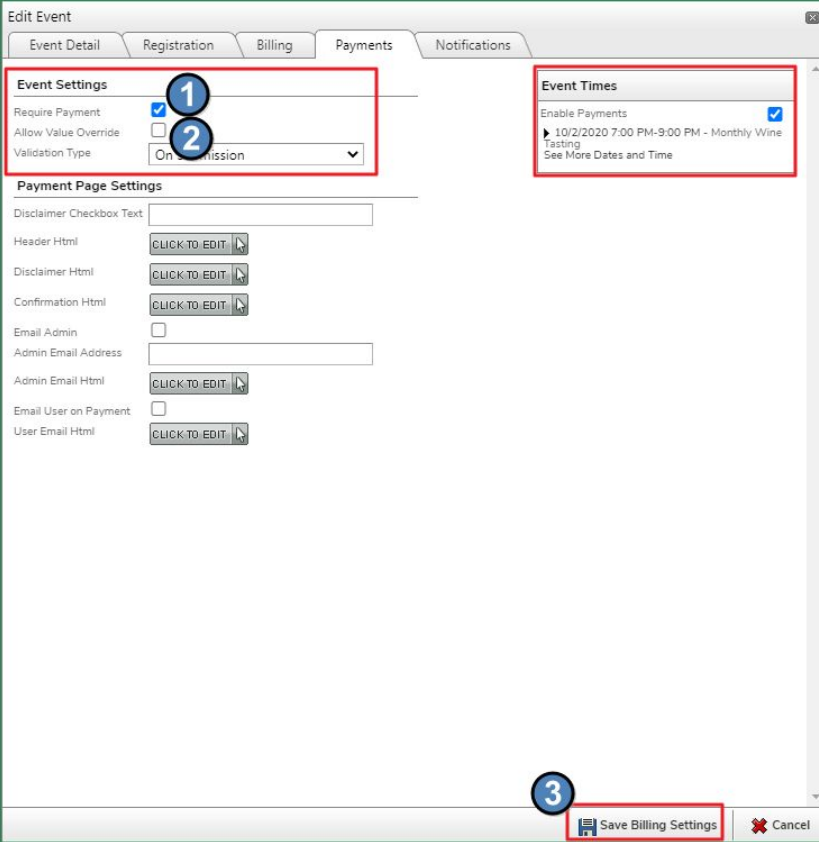
Member and Administrator Registration

Access via Calendar or through Event Manager.

Reservations can be made as an admin or by impersonating a member

1. Update Party Size
2. Remember to remove your own account
3. Search for desired members
4. Add Child or Spouse if enabled
5. Save Registration

Enabling Payments

1. Payments can be made required upon submission. This can prevent members from registering for an event without payment.
2. There is an option to allow members to override the event amount when making a payment however I would normally not recommend this option.
3. Select Save Billing Settings to fully enable payments.

Member Payment Experience

With Payments enabled, members will be taken to a Paycloud portal where they can use an existing account they have already added or even add a new ACH or CC account to pay.

Paycloud Reporting

- Sign into Paycloud
- Select Reports
- View Payment History
- Use Payment Type filter
- Change dropdown "Payment Type Equals" to Event
- Select Apply

Interest Area functionality
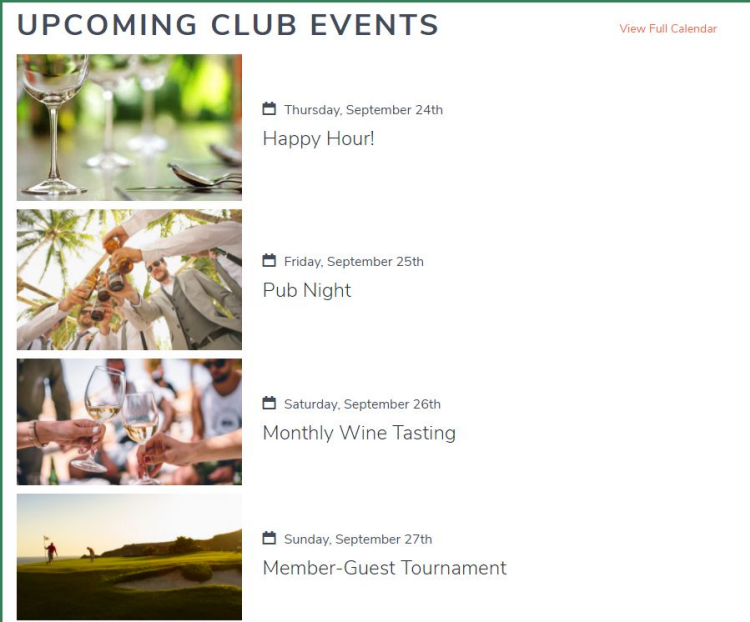
Interest areas can be subjects like Golf, Tennis, Boating, etc. However they can be absolutely anything such as Public Events, Private Homepage Events, Book Club, etc. Calendars and plugins use filters to only display events based on interest areas.
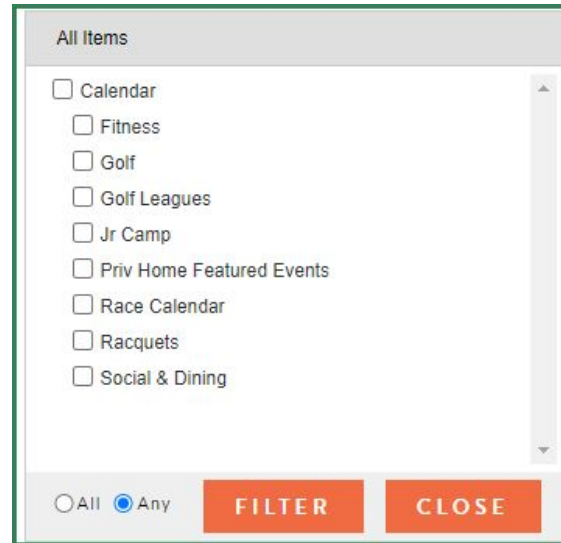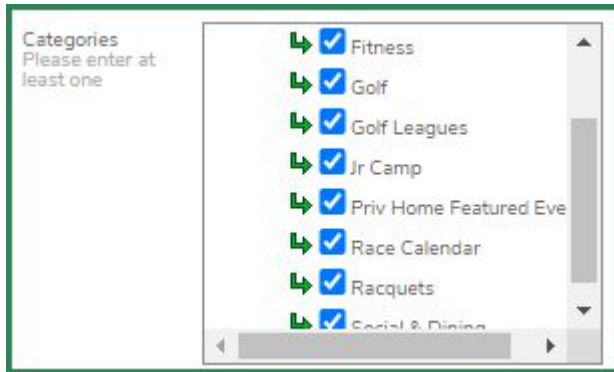
How Interest Areas Affect Plugins

Calendar plugins located on private home pages and other pages can be set to show specific events based on interest areas. Contact Support if you would like more plugins, or to update any existing plugin

Event Manager Overview

- **Accessible via Admin Bar**
- **Filter Options**
  - Date Range
  - Title
  - Member Name
  - Email Address
  - Member Number
- **Adjustable Columns**
- **Click event name for details**

Event Manager

Filters

Date Range	9/22/2020	to	11/21/2020	
Event Title		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 All Guests | Print | Help

	Title	Adults	Children	Total	Incomplete	Allowed	Date ▲
☐	Core Strength	0	0	0	0	25	9/22/2020 8:00 AM
☐	Tennis Clinic - Intermediate	1	0	1	0	20	9/22/2020 9:00 AM-10:00 AM
☐	Zumba Lite	0	0	0	0	25	9/22/2020 10:00 AM
☐	Tacos & Tequila	0	0	0	0	75	9/22/2020 3:00 PM-6:00 PM
☐	Yoga	1	0	1	0	25	9/22/2020 4:00 PM
☐	Pilates	0	0	0	0	25	9/22/2020 5:30 PM
☐	Tennis Clinic - Advanced	0	0	0	0	20	9/23/2020 9:00 AM-10:30 AM
☐	Aqua	0	0	0	0	3	9/23/2020 9:00 AM
☐	Zumba Lite	0	0	0	0	25	9/23/2020 10:00 AM
☐	Yoga	0	0	0	0	25	9/23/2020 4:00 PM
☐	Pilates	0	0	0	0	25	9/23/2020 5:30 PM
☐	Tai Chi	0	0	0	0	25	9/23/2020 7:00 PM
☐	Core Strength	0	0	0	0	25	9/24/2020 8:00 AM
☐	Body Sculpt	0	0	0	0	25	9/24/2020 11:00 AM

Viewing Event Details and Toolbar

- **Edit Event** - Open event interface
- **Event Notifications** - Opens event notifications tab
- **View Event** - Open event flyer
- **Email Registrants** - Compose email with registrants added to recipients list
- **Send Voice Message** - add-on service
- **Print** - Print event details page from web tab

The Registration Menu

- **Add Registration -** Add members to events.
- **Export Reservation Listing -** Create CSV file with details per reservation
- **Export Attendee Listing -** CSV with each attendee on individual rows
- **Export Guests -** CSV with lists of guests if enabled
- **Add Attendees to Group -** Create Static group with event attendees
- **View in Custom Report -** View event details in Custom Report
- **Show More Info -** Display extra information such as Administrator notes
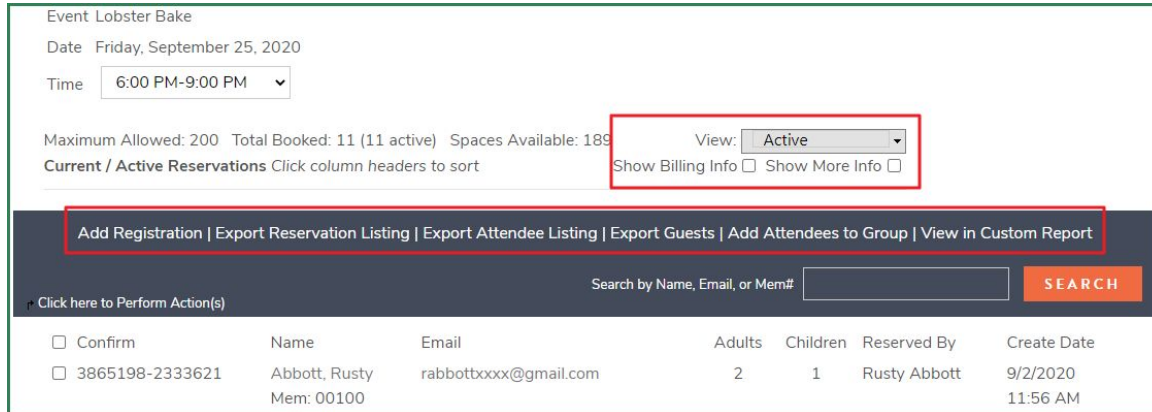

Event Lobster Bake

Date   Friday, September 25, 2020

Time   6:00 PM-9:00 PM

Maximum Allowed: 200   Total Booked: 11 (11 active)   Spaces Available: 189   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
☐ 3865198-2333621	Abbott, Rusty Mem: 00100	rabbottxxxx@gmail.com	2	1	Rusty Abbott	9/2/2020 11:56 AM

Custom Reports Overview

Occasionally the standard reports of reservation and attendee listing might not meet your clubs needs. Custom reports allow administrators to create as simple or as complex reports as desired. Most of the reports you will need are available already however if you are interested in a new one, please contact support.

Event Report Listing

Create New Report | Return to Event Manager

Filters

Report Title [ ] Report Type [Show All ▾] **REFRESH**

Local Reports

Name ▾	Report Type	Created	Last Updated
View	Edit	Delete	Registration	9/11/2015 1:05:35 PM	9/11/2015 1:05:35 PM
View	Edit	Delete	Event	3/24/2016 12:45:29 PM	3/24/2016 12:45:29 PM
View	Edit	Delete	Registration	3/24/2016 12:45:43 PM	3/24/2016 12:45:43 PM
View	Edit	Delete	Registration	5/24/2016 1:52:44 PM	5/24/2016 1:53:53 PM
View	Edit	Delete	Registration	5/24/2016 1:54:08 PM	5/24/2016 1:54:08 PM
View	Edit	Delete	Attendee	5/24/2016 1:54:28 PM	5/24/2016 1:54:28 PM

How to Control Events Showing on Your Mobile POS Device

- The Event must be assigned to the same Area that the Mobile POS device is assigned to
- Per the below set-up, the Monthly Wine Tasting Event will show on Grand Key Club's POS device named: 2-F&B: Grill POS

The Website Event Area equals Grill Room.

The Grill POS Terminal in CMA is assigned to the Grill Room Area.

The 2-F&B: Grill POS Device in CMA is assigned to the Grill POS Terminal.
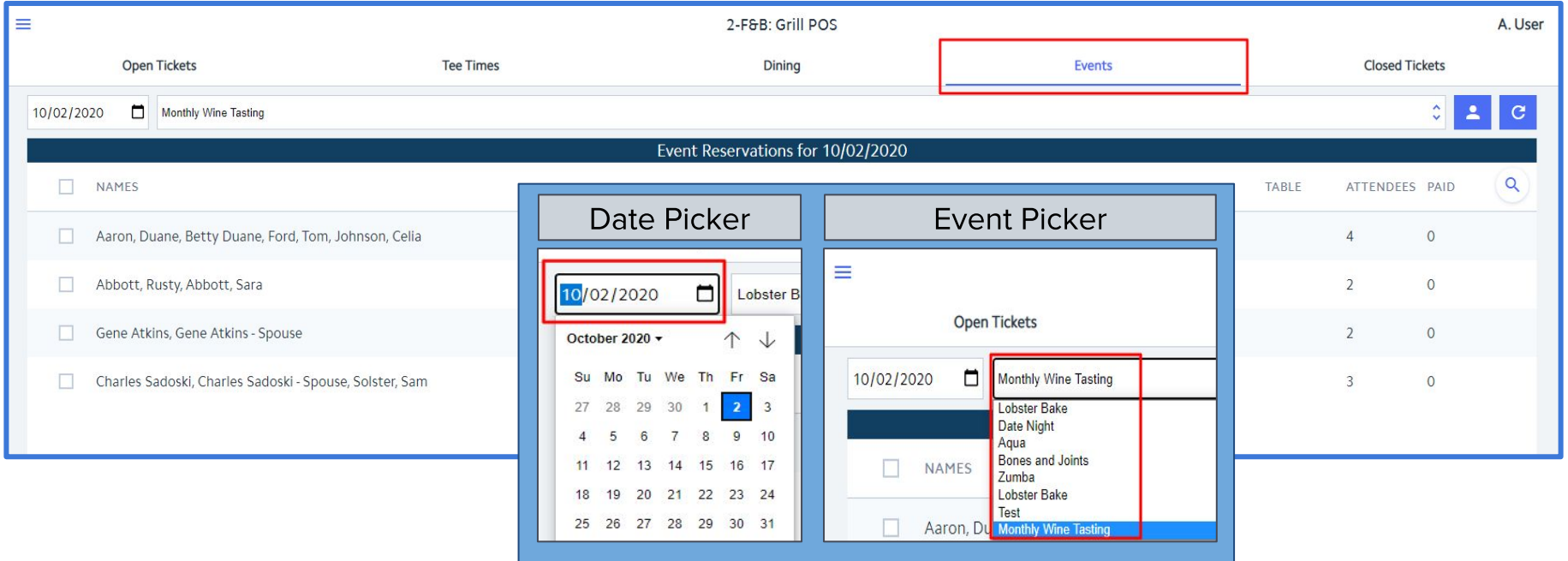
Finding Your Events On Your Mobile POS Device

- Events will appear as an option across the top of your Mobile POS device
- The date will always default to the current date; use the Date Picker to select a different date
- Use the Event Picker to select other Events occurring on that date for the Area

Checking In Event Registrants

- Click on the Member Registration you want to check-in
- Click Create Ticket
- Select Who is paying and Who is being paid for
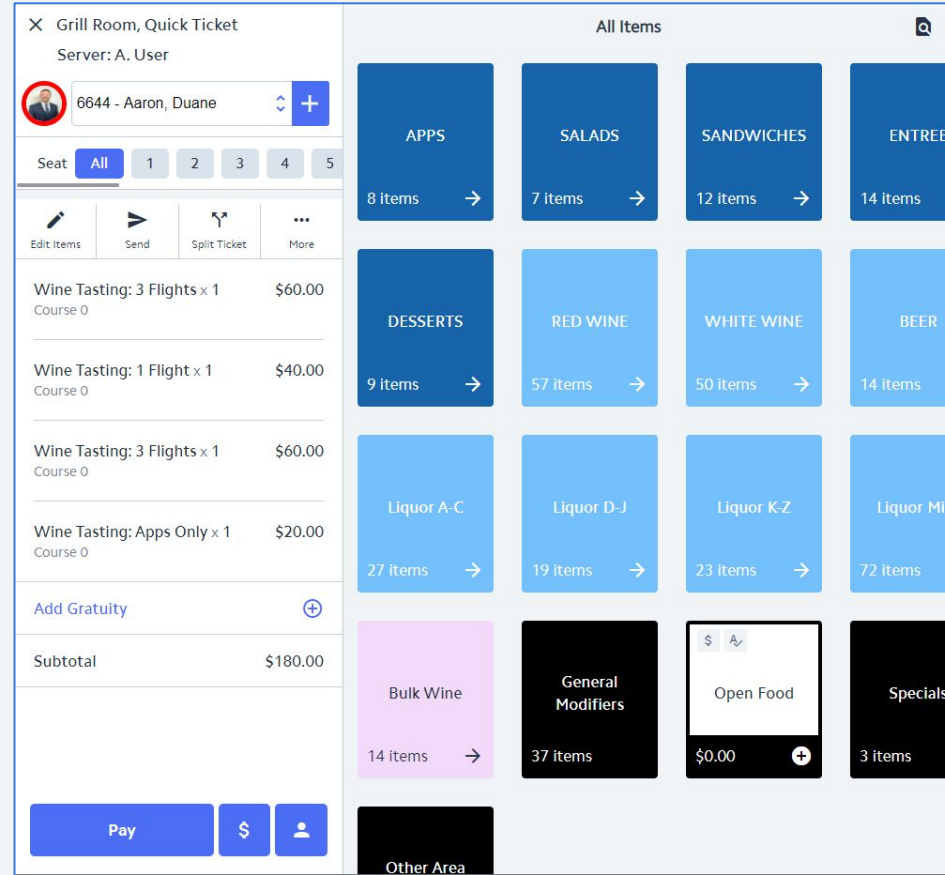
Automatic Ticket Creation

- A ticket is automatically created for Duane with all 4 Event items he registered for and their associated price
- You have the option of charging Duane out immediately for the ticket or leaving it open for additional purchases and settling at the end of the Event

Event Tab Appearance After Ticket Creation

- Event registrations that are completely settled/closed are highlighted in green on the Events tab

2-F&B: Grill POS

| Open Tickets | Tee Times | Dining | Events | Closed Tickets |

10/02/2020   Monthly Wine Tasting

Event Reservations for 10/02/2020

	NAMES	TABLE	ATTENDEES	PAID
☑	Aaron, Duane, Betty Duane, Ford, Tom, Johnson, Celia		4	4
☐	Abbott, Rusty, Abbott, Sara		2	0

- Event registrations for which tickets have been opened but are not yet closed are highlighted in yellow

2-F&B: Grill POS

| Open Tickets | Tee Times | Dining | Events | Closed Tickets |

10/02/2020   Monthly Wine Tasting

Event Reservations for 10/02/2020

	NAMES	TABLE	ATTENDEES	PAID
☐	Aaron, Duane, Betty Duane, Ford, Tom, Johnson, Celia		4	0
☐	Abbott, Rusty, Abbott, Sara		2	0

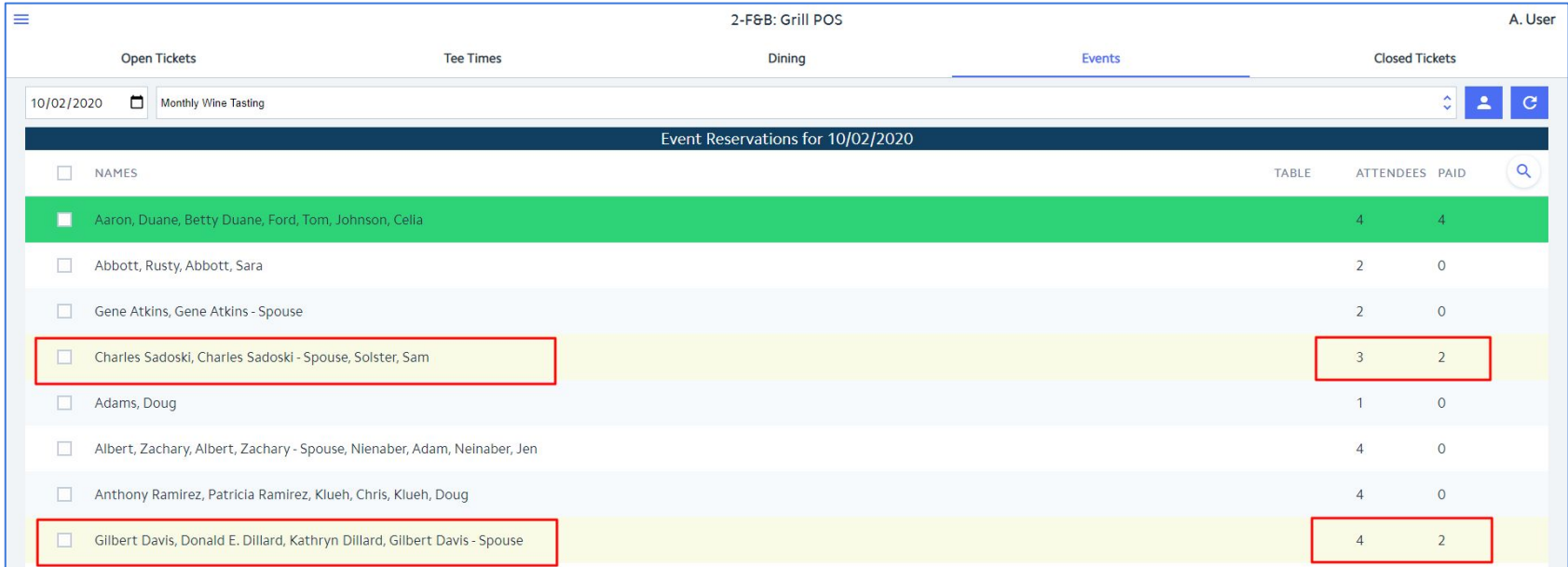## Opting to Pay for Part of the Attendees but not All Attendees

- In this example, Gilbert Davis has made a reservation for the Monthly Wine Tasting event for 4 attendees but is opting to pay for only he and his wife and not for Donald Dillard and his wife
- After clicking OK, a ticket is created for Gilbert containing only the items that he and his wife registered for
- For the sake of this example, we will settle and close Gilbert's ticket immediately

Attendees vs. Paid Counts

- Registrations that include a combination of paid attendees and unpaid attendees will be highlighted in yellow. The Attendee Count and Paid Count can be used to determine how many attendees still need to pay.

Opening Another Ticket for a Partially Paid Registration

- Clicking on the checkbox next to Gilbert's registration on the Events tab will present the "Who is paying?" and "Who us being paid for?" options
- All registered Members are always listed as "Who is paying?" options
- Only attendees that have not yet been accounted for via an open or closed ticket will be listed as "Who is being paid for?" options
- In this example, Donald Dillard will pay for he and his wife
- After clicking OK, a ticket is created for Donald containing only the items that he and his wife registered for
- For the sake of this example, we will settle and close Donald's ticket immediately and can now see that Gilbert's registration is paid in full

Ticket Status Changes Will Impact the Registration Status

- As indicated below, Duane's registration is paid in full. Duane paid for all 4 attendees himself on 1 ticket: Ticket #6644

☐ Aaron, Duane, Betty Duane, Ford, Tom, Johnson, Celia	4	4

- If Ticket #6644 is Re-Opened, Duane's Event Registration Status will change to being highlighted in yellow indicating that a ticket has been opened but not yet settled.

☐ Aaron, Duane, Betty Duane, Ford, Tom, Johnson, Celia	4	0

- If Ticket #6644 is Deleted, Duane's Event Registration Status will change to being unhighlighted indicating that a ticket has not yet been created for this Event Registration.

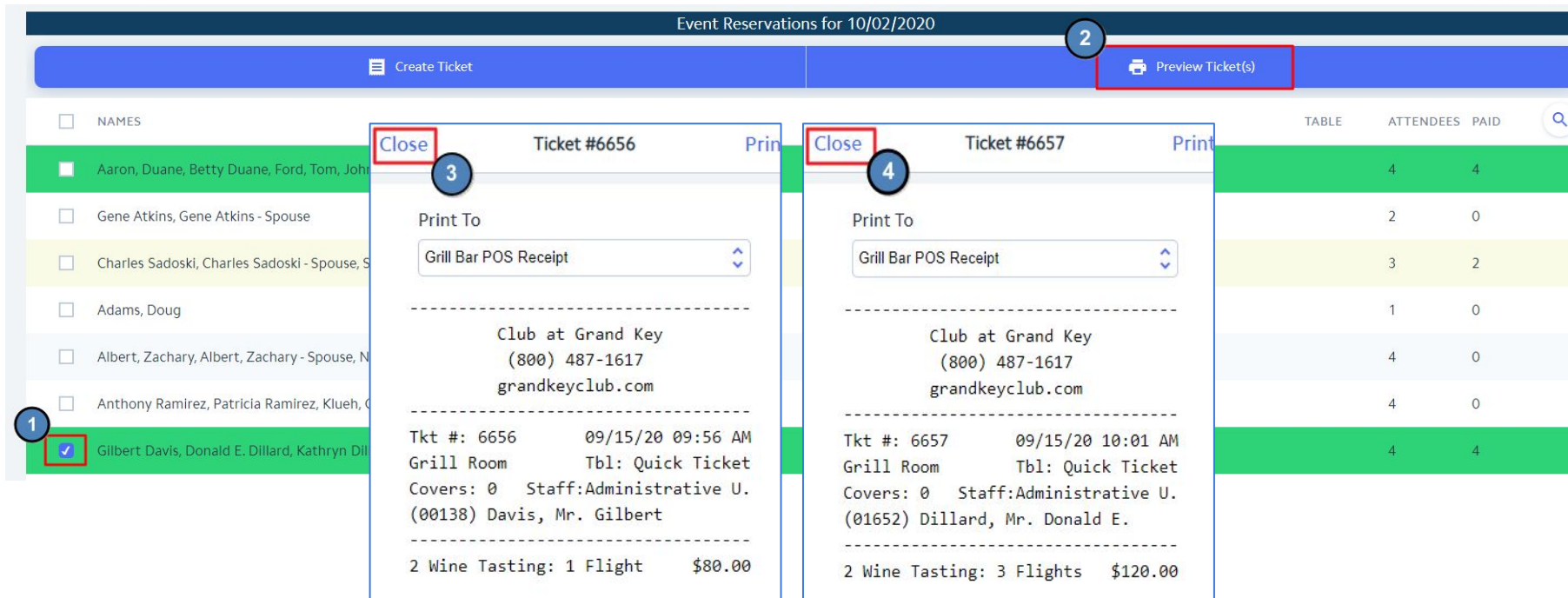|		
☐ Aaron, Duane, Betty Duane, Ford, Tom, Johnson, Celia	4	0

Trying to Create a Ticket When All Attendee Tickets Have Been Created

- If tickets have already been created for all attendees included in an Event registration, trying to generate any additional tickets for the registration will result in an error being displayed on the POS device stating "A ticket has already been created for each attendee."
- This is important to note since a yellow highlighted row only tells you that at least 1 attendee ticket has been created, but does not tell you if there are remaining attendees that still need tickets.
- The warning message will prevent you from creating unnecessary/duplicate tickets and alert you to navigate to the Open Tickets tab to find the already created tickets.
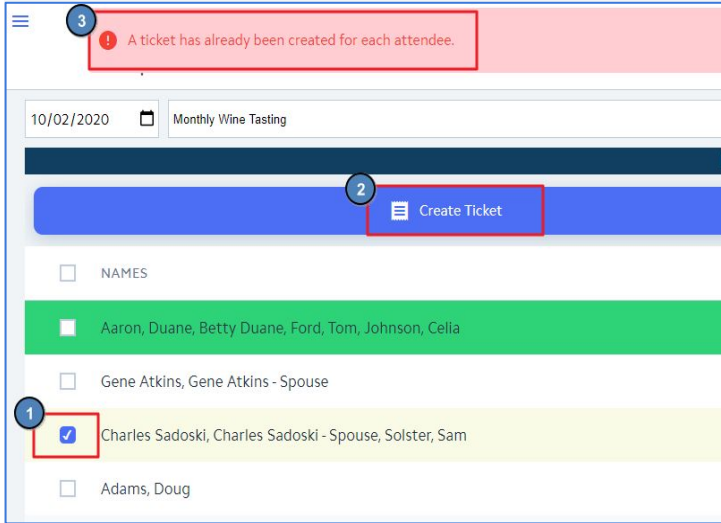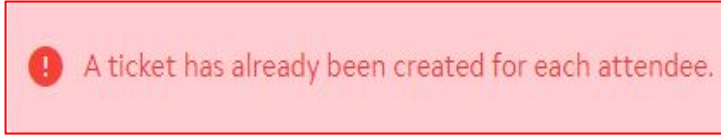
Previewing Tickets from the Event Tab

- When previewing tickets for a reservation consisting of multiple tickets, clicking the Close option on each ticket will walk you through the series of tickets within the reservation.

Bulk Ticket Creation for All/Many Event Registrants

You have the option of creating tickets for all (or many) registrants at one time; Bulk Check-in. Select the registrations you want to include in Bulk Check-in and click Create Ticket. The system will walk you through each registration sequentially until tickets have been created for each of the selected registrations. Once complete, you will be taken to the last ticket opened.

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Q&A