



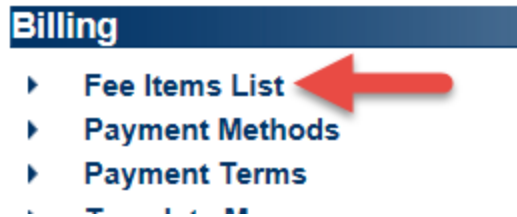
# Events

Items covered in this lesson. The time stamps match the recorded workshop.

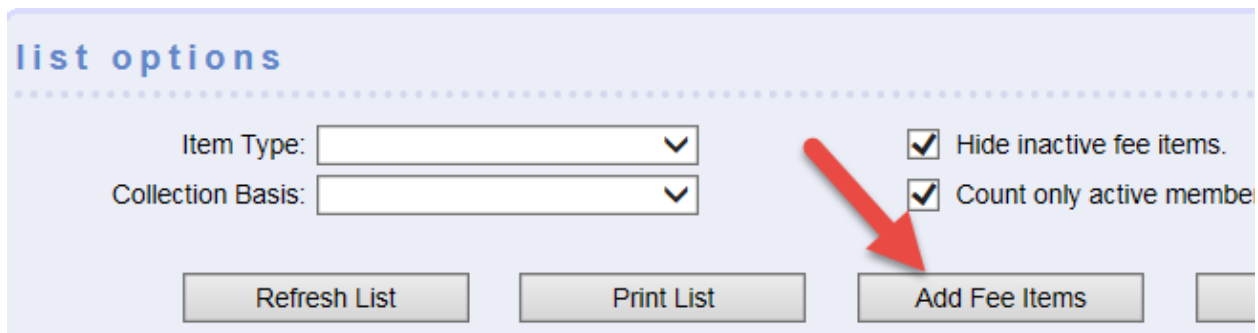
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# Add and event fee

1. Go to **Setup > Billing > Fee Items List**



2. Click **Add Fee Items**



3. Complete the **New Fee Item** screen making sure **Item Type** is changed to the **Event Fees** selection.

**New Fee Item**

Regular Fee  Bundled Fee <sup>?</sup>

Fee Item Name: 1 ticket

Description: 1 registration

Income Account: Event Income

Show inactive Income Accounts

Sales Tax: Non (0%)

Price: 10.00 (annually or one-time)

Item Type: Event Fee

Status: Active

Frequency: One-Time

Collection Basis: Accrual

Voluntary:  Treat this fee as voluntary.  
*Note: Unpaid voluntary fees do not count against a member's account balance and are not automatically included on billing statements.*

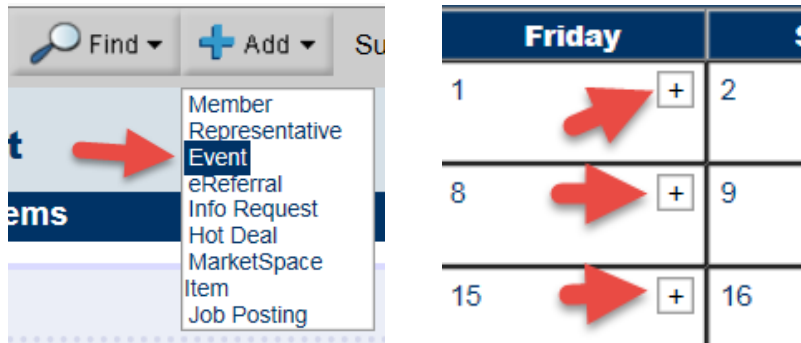
Batch Invoice Group: <sup>?</sup>

Save & Exit    Cancel

4. Click **Save & Exit**.

## How to add an event

1. On the **Add** menu, click **Event**.



**Note:** Optional: You may also click the + sign on the date of the event when on the Events->Calendar tab. First, advance the calendar to display the desired date. Then click the plus sign on that day. The date field will automatically display your desired date.

2. Complete the **General Information** fields and click **Next**.
  - a. **Event Title:** This title will display in your Events drop-down list and also on the Event web page.
  - b. **Start/End Date/Time:** Ensure that these dates are correct. A different end date is only needed when a single event runs multiple days – like over the weekend.
  - c. **All Day Event:** Deselect this checkbox if you desire to display exact times. Time may also be specified in the Date/Time field on the next window.
  - d. **Reminder:** An automatically generated reminder email will be sent using content from details on the General tab of your event. Preview the automatic reminder by clicking the reminder link. The email is sent to all registrants on your Guest List with a status of Registered. The email “look and feel” may be modified with your own custom template if desired. Instructions for web designers are available.
  - e. **Recurrence:** An event occurring multiple times on your calendar may be duplicated by setting a recurrence. See “Create a recurring event”.
  - f. **Approval Status:** Approved status will display this event on all calendar marked under “Visibility”. Status of Pending or Disabled will not display on the public calendar.
  - g. **Visibility:** Check the calendars that should display this event. Note: all events regardless of these checkboxes will display on the Events->Calendar tab.
    - a. **Internal Chamber Event Calendar** – When this option is checked the event can be filtered separately on the internal calendar system when you go to Events > Calendar tab and click on filter options.
    - b. **Display on Public Events Calendar** – When this option is checked the event will display on the website’s calendar as well as the upcoming events list. This

option must be selected in order for the event to show on your public website.

- c. **Display on Members Only Calendar** – When this option is checked the event will display on the Member Information Center (Members Portal) after they log in. This option must be checked for the event to show on the members’ calendar in the Member Center.
- d. **Display on Featured Events** – This option allows for this event to be listed as a featured event on the featured events list.
- h. **Event Category:** Select as many categories as desired for this event. Website visitors may search for events by category on the public website. The Administrator may add/remove categories, by clicking edit categories

## Add a New Event

▶ **Step 1: General Information**  
Step 2: Descriptions/Appearance  
Step 3: Fees/Billing Information

<b>Event Title:</b>	<input type="text"/>	<input type="button" value="Copy a Past Event"/>
<b>Time Zone:</b>	(GMT-06:00) Central Time	<input type="checkbox"/> Show/Select from all time zones
<b>Start Date/Time:</b>	01/13/2016	<input checked="" type="checkbox"/> All Day Event
<b>End Date/Time:</b>	01/13/2016	<a href="#">▶ same as start date</a>
<b>Reminder:</b>		<input type="checkbox"/> Send automatic <a href="#">reminder</a> to all registrants
<b>Recurrence:</b>	None	
<b>Professional Development Hours:</b>	<input type="text"/>	<b>Continuing Education Units:</b> <input type="text"/>
<b>Goals:</b>	Attendance: <input type="text"/> Total Revenue: <input type="text"/>	Number of Sponsors: <input type="text"/> Sponsorship Revenue: <input type="text"/>
<b>Approval Status:</b>	Approved	
<b>Visibility:</b>	<input checked="" type="checkbox"/> Internal Event Calendar <input checked="" type="checkbox"/> Display on Public Events Calendar <input checked="" type="checkbox"/> Display on Members Only Calendar <input type="checkbox"/> Display on Featured Events	
<b>Event Category:</b>	<input type="checkbox"/> Arts & Culture <input type="checkbox"/> Chamber Of Commerce <input type="checkbox"/> Clubs/Organizations <input type="checkbox"/> Community <input type="checkbox"/> Continuing Education <input type="checkbox"/> Festivals & Celebrations <input type="checkbox"/> Government <input type="checkbox"/> Holiday <input type="checkbox"/> Recreation & Sports <input type="checkbox"/> Schools	

<< Back

Next >>

Finish

Cancel

3. Complete the **Descriptions/Appearance** fields and click **Next**.

- a. **Event, Location, Date/Time, and Fee Description:** click **edit** next to each area to access the editor where the information should be typed. In the **Event Description**, use the editor to format the text as desired for display on the website. Add Attachments (downloaded documents), insert website links, and add graphics using the selections in the editor menu as desired.

The image shows four vertically stacked rich text editors. Each editor has a title and a link to 'advanced edit':


- Event Description:** [advanced edit](#)
- Location Description:** [advanced edit](#)
- Date/Time Description:** [advanced edit](#)
- Fee Description:** [advanced edit](#)

Each editor includes a toolbar with icons for Bold (B), Italic (I), Underline (U), Text Color (A), Font, Size, Bulleted List, Numbered List, Link, Unlink, and a checkmark icon. The main text area of each editor contains the placeholder text 'Click here to edit...'.

- b. **Website URL Text:** Type a word or phrase that will display as the link for the URL entered in the **Website URL:** field. For example: Type “Click here for more information” in the **Website URL Text**.

**Contact Information:**

<b>Contact Email:</b>	<input type="text"/>
<b>Website URL:</b>	<input type="text"/>
<b>Website URL Text:</b>	<input type="text"/>



4. Complete the **Fees/Billing Information** fields and click **Finish**.
- a. **Assign Fee Items:** If fees will be associated with this event, click Assign Fee Items. In order to be assigned, fees must first be created by someone with Finance or Administrator permissions. Fees can also be assigned later on the Fees tab of the event.

Event Fee Types Available for this Event				
Display Name	Description	Public	Eligibility	Amount!
Add fees by clicking on the <a href="#">Assign Fee Items</a> button below.				
				<b>Assign Fee Items</b>

- b. **Online Registration Options:** If desired, select to allow members and/or non-members to register online for this event. Selecting this checkbox will immediately display the Register button on the public event page. This selection can also be turned on later on the Fees tab of the event.

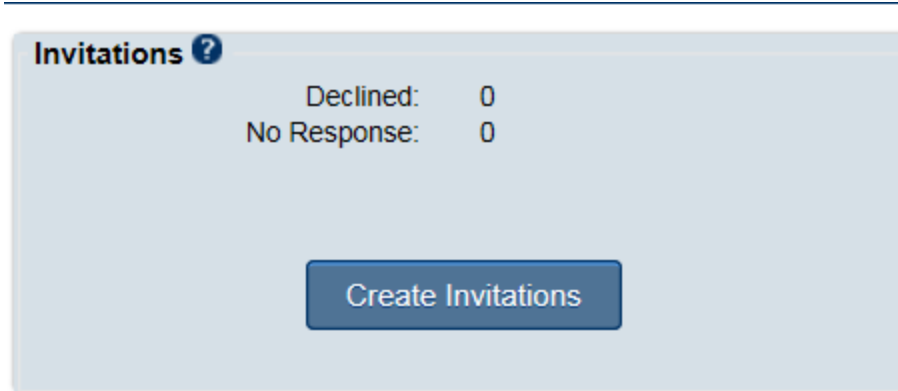
#### Online Registration Options

- Allow members to register online for this event.**  
Active, Courtesy members receive "Member" pricing;  
Non-Member, Prospective members receive "Non-member" pricing
- Allow registrant to make payment with a **Credit Card** (online only).
- Allow registrants to request to be **Invoiced** for fees incurred.
- Allow registrants to specify that they will pay by **Cash or Check** at the time of the event.
- Allow non-members to register online for this event.**
- Allow registrant to make payment with a **Credit Card** (online only).
- Allow registrants to request to be **Invoiced** for fees incurred.
- Allow registrants to specify that they will pay by **Cash or Check** at the time of the event.

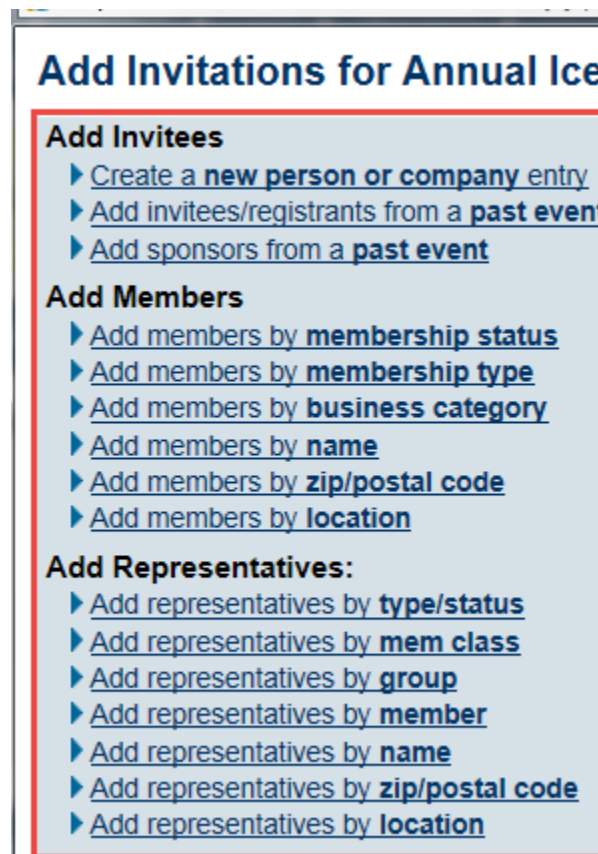
Click **Finish** to complete the new event setup.

## Create Event Invites

1. In the desired event go to the **Guest List** tab
2. In the Guest List Summary box click **Create Invitations**



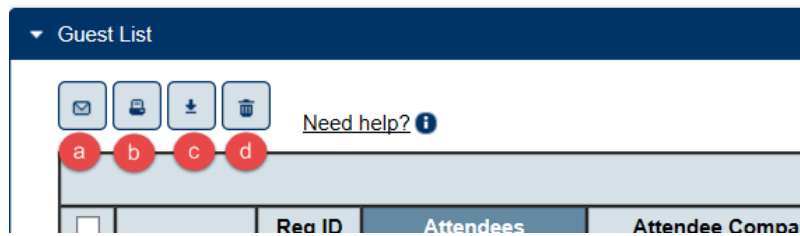
3. This will open the Add Invitations box, Add Invitees by preferred filter option, click continue



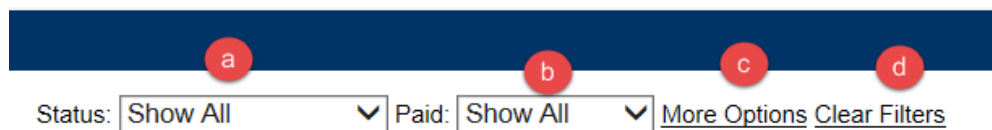
4. In the editor make any updates or additions you wish, when you are ready click Send
5. Once the invitee gets this email they will be able to register, decline or review the event.



## Guest List Overview


















- a. **Email** – this options allows you to email the attendees on the Guest List
- b. **Report** – This option allows you to print the Guest List, Check in Roster, Mailing Labels and Name Tags.
- c. **Download** – Downloading the guest list will show extended information about the attendees. This report will download in an CSV format, which allows you the ability to sort as needed.
- d. **Discard** – This is to be used when you need to remove an attendee from the guest list. If there is a billing transaction tied to the registration it is best to cancel the registrant






- a. Sort the list to see a specific status of attendees.
- b. Filter the list to see your Paid, Unpaid and Cancelled attendees
- c. **More Options** allows you the option to add additional information on to your guest list, such as any custom registration fields.
- d. **Clear Filters** – sets the filters back to their default settings.






## Action Buttons

<input type="checkbox"/>		<u>Reg ID</u>	<u>Attendees</u>	<u>A</u>
<input type="checkbox"/>	  	2922	Bailee Frank	Mike's
<input type="checkbox"/>	  	2957	JC Rodriguez	JC Ele
<input type="checkbox"/>	  	2926	Maggie Anders	
<input type="checkbox"/>	  	2927	Maggie Anders	
<input type="checkbox"/>	  	2956	Maggie Jenson	Non m

### Action buttons:

-  = Edit Attendee contact info, custom fields, record association
-  = Edit Registration, status, fees and additional fees, primary contact, resend confirmation
-  = Make payment or change payment info; grey color if zero balance

### Meaning of colored action buttons:

-  = payment has been made in full.
-  = payment has not been made in full, click to record/make the payment
-  = Attendee is fully associated with a record in your database.
-  = Attendee needs associated with a record in your database, click to edit and associate
-  = Attendee is associated with a member record, but not a rep record.

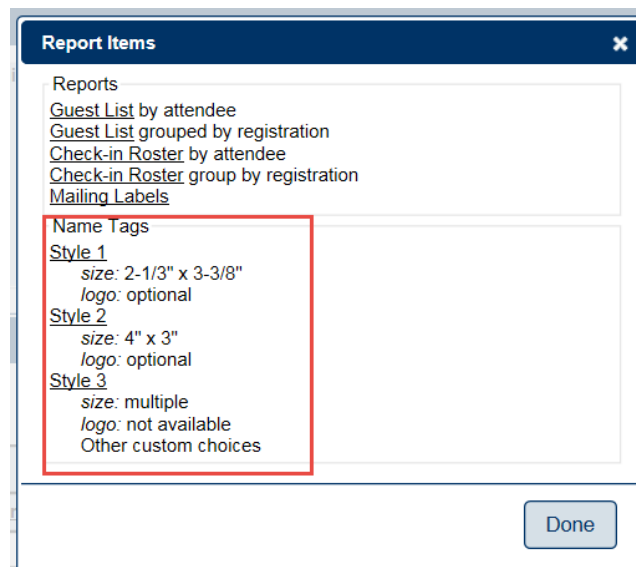
Ideally all attendees should be associated with a rep record to provide the best reporting. Exceptions would be if you have a non-member attendee that doesn't exist in the database and you are associating them with a generic member record (such as Non-Member Event member record)

## Print name tags

1. On the guest list of the desired event click the Reports button



2. Choose the Style of name tag you would like to create.



3. Select the additional guest list filters, click Continue

## Event Guest List Report Filters

- Include all attendees.
- Include only attendees displayed in the Guest List as it is currently filtered.
- Use the following criteria for the attendees included in the report:

Registration Status	Payment Status
<input checked="" type="radio"/> Any Registration Status	<input checked="" type="checkbox"/> Any Billing Status
<input type="radio"/> No Invitation Sent	<input type="checkbox"/> Show Unpaid Only
<input type="radio"/> No Response Returned	<input type="checkbox"/> Show Paid Only
<input type="radio"/> Registered	
<input type="radio"/> Cancelled	

- Include currently selected attendees only (0).
- Include only Primary Contact from event registration.

### 4. Click View/Print Name Tags

Style:  |

Alignment:

Start Position: row:  column:

- [PDF files & Name Tags](#)
- [CSV files & Mail Merges](#)

### 5. They will open in a PDF editor for you to print.

## Create invoices for event registration

1. Select the desired event.
2. Click on the **Account** tab \*If the **Create invoices** now button does not appear, there are no invoices to be created at this time.
3. If Registrations have specified a payment method that should result in a transaction, a selection will appear indicating the number of invoices that need to be created
4. Click **Create Invoices Now**

**1 Registration(s) have been marked for invoicing but have not been invoiced yet.**

**Create Invoices Now**

5. If you have already created this batch and you see the message that says “**Match Found**”, then most likely you need to scroll down and click **New Batch**. If a match was found it means you’ve already invoiced this particular set of invoices. If there are some additional invoices that need “added to this batch”, you would want to create a new batch. Invoices that are added to the batch will update the entire batch with any new terms, dates, and payment options which changes those original invoices. Selecting **New Batch** is typically a better, safer idea.

# Cancel and refund registration

Choose the scenario that best matches your process and process the refund.

**Scenario #1** – If there is an unapplied PAYMENT showing that they need to refund to the customer.

1. Look at the JEE-Accrual basis to see what Accounts Receivable the original payment was tracked under.
2. Create a new INVOICE, for the same dollar amount as what the refund is going to be, using the Accounts Receivable account determined in step 1. The fee item that would be used doesn't matter.
3. Open the unapplied PAYMENT transaction so that you can apply it to the newly created invoice.
4. Open the original PAYMENT again and select the REFUND PAYMENT option.
5. Follow up by issuing a check out of the accounting system's check register debiting the necessary income account and crediting the bank account.
6. The transaction is not exported because the issuing of the check, or recording of the credit card reimbursement, in their accounting software, has already accounted for this. Refund transactions are hidden from the export by default.

**Scenario #2** – If the customer's account has a zero balance.

1. Open the original PAYMENT that needs to be refunded and select the REFUND PAYMENT option.
2. Follow up by issuing a check out of the accounting system's check register debiting the necessary income account and crediting the bank account.
3. This transaction is not exported because the issuing of the check, or recording of the credit card reimbursement, in their accounting software, has already accounted for this. Refund transactions are hidden from the export by default.

**Scenario #3** – If there is an unapplied PAYMENT showing that they need to partially refund to the customer.

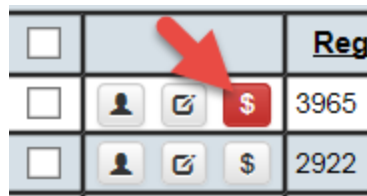
1. Look at the JEE-Accrual basis to see what Accounts Receivable the original payment was tracked under.
2. Create a new INVOICE, for the same dollar amount as what the refund is going to be, using the Accounts Receivable account determined in step 1. Make note of the fee item that is being used (in description on invoice even put some note to track refund).
3. Open the unapplied PAYMENT transaction so that you can apply it to the newly created invoice.
4. Open the original PAYMENT again and select the REFUND PAYMENT option.
5. Reset any line items that are not part of the refund to a 'blank' status so that they are not part of the transaction.
6. Follow up by issuing a check out of the accounting system's check register debiting the necessary income account and crediting the bank account.
7. The transaction is not exported because the issuing of the check, or recording of the credit card reimbursement, in their accounting software, has already accounted for this. Refund transactions are hidden from the export by default.

## To update the event guest list to show canceled attendees

1. In the desired event go to the canceling attendee/registration on the guest list
2. Click on the **Edit Registration** action button
3. Change **Status:** to **Cancel**.
4. Click **Save & Close**

## How to apply a payment to an open event invoice

1. In the desired event go to the **Guest List**
2. Look for the red action button. The red button will indicate an open balance



<input type="checkbox"/>				<b>Reg</b>
<input type="checkbox"/>				3965
<input type="checkbox"/>				2922

3. Enter in the payment details
  - a. Update the **Payment Type:** with the correct option: **Credit Card, Invoice, Cash or Check, No Charge**. If you choose Credit Card and you are integrated in with a credit card processor you will be able to take the payment from the database
  - b. Update the **Payment Status:** to Paid
  - c. Enter in the payment reference number
  - d. Click **Record Payment**
  - e. Click **Save & Close**

### Edit Payment

Registration Information	
Payment Type: <b>a</b>	Payment Status: <b>b</b>
<input type="text" value="Invoice"/>	<input type="text" value="Unpaid"/>
Check # or Payment Reference #: <b>c</b>	Invoice Ref #: <b>i</b>
<input type="text"/>	<input type="text" value="For external tracking only"/>
<input type="button" value="Record Payment"/> <b>d</b>	

## Adding a Sponsor

Sponsors may be added to your sponsor list in one of two ways:

- Manually by you or your staff
- Automatically added to your list upon registration

Add a sponsor manually from the Sponsors tab

1. On the Sponsors tab, click **Add a Sponsor** in the List of Sponsors area.
2. Complete the Enter Information screen. If the Sponsor is a member you can select their information from the drop down that shows up when you start entering in information.
3. Once the information is added you can continue with the registration process. If they are going to be attending the event make sure the Includes as an attendee on the Guest List
4. Complete the registration process as normal

From the Guest List – If they are sponsoring only not attending.

1. Click on the Edit Registration action button and update the status to Sponsor Only – Not Attending
2. Click Save.
3. This will put them on the sponsor list but they will not be on the guest list.

Setup after they are marked as a sponsor

1. Load in their Sponsor Logo
2. Update the Logo Link URL if needed
3. Set the logo placement on the event page
4. Update and assign sponsor level
5. Adjust the sort order if needed
6. Click Save