How to Set Up and Manage
EVENTS

This guide has been designed to assist you in the process for setting up and managing your club events on the CRNZ Club Membership & Paddler Portal.

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If you have any questions or if you require assistance, please contact membership@crnz.org

There are two main areas to set up with creating your event.
1) Event Details
2) Tickets

The event is what individuals will see and your Tickets are what individuals will purchase (Even at a $0 cost free event).

You have the ability to set up multiple tickets for your events (i.e., Junior, Adult, 10km, Men's, Woman's etc.), restrict who can purchase the tickets and determine when a discount or surcharge should be applied to the ticket price based on a number of factors including the age of the member, the date of the purchase, memberships held by the member or fields on the member's profile.

There is a detailed guide on Restrictions, Discounts and Surcharges that can be referred to when attempting to add any of these restrictions to the tickets.

SETTING UP EVENTS

To create a new event, from the Menu, locate and click on the "Event Management" tile. If you do not have any events set-up, you will see the green help screen.
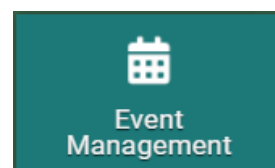
At the top of the screen on the left-hand side you will see the "Add New Event" button. Click on this to create a new event. This will open a form to create a new event.

NAME AND TYPE
Give your event a Name. This is the name that be seen by all members. You will then need to select a "Category" and then your selection in this area will then determine the list available under "Subcategory. Make the relevant selections for your Event.

LOCATION TYPE
You can select Venue, Announce Later and Online as the location type. If you select Announce later or online, you will not have the event location fields set out in the below step.

EVENT LOCATION
Enter the name of your Event Location (i.e. Hawkes Bay Kayak Racing Club) and then enter in the address details of the location. You will see a map to the right-hand side of the screen. If, after entering your event address, you are not happy with the location that the "Pin" is dropping for your event (Note: This is what Members will see when looking at the event),

click on the "Not the right location on this map" hyperlink directly under the map to enter in the Latitude & Longitude of your event. To see how to obtain geo location information refer to one of the Club Set-up and then copy and paste the geocode into the "Location Reference (Latitude & Longitude)" box. DO NOT click on "Update Location".
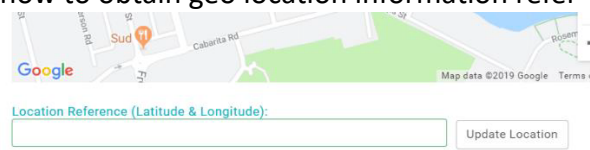
EVENT DATE/S AND TIME/S

Select the relevant time zone from those available for your location. Using the date and time pickers, select the start and end date and times for your event. Times are listed in 24hour format. You can opt to hide the date from the event listing, by ticking the box and entering display text instead. For example, "Every Sunday for the Month of May".
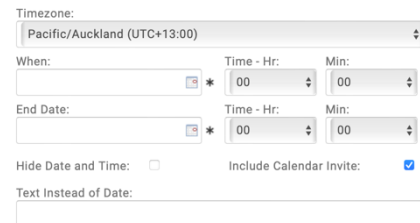
EVENT DETAILS

To upload an image for your event, click on the small camera icon over the image area, click on the "Browse" button and select an image from your device to upload. Click "Done" when you have finished making your selection and the image will be saved.
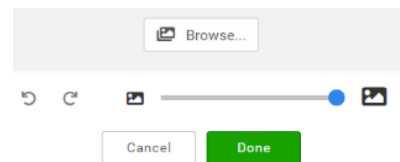
Under "Event Details" you can enter detailed information about the event. You have the ability to enter images into this text area as well as hyperlinks, documents and tables. Use the icons located under the bold, italic and underline symbols. You have full html formatting available and can change the font, font colour and background colour and other formatting options you would expect to see in a Word Document.
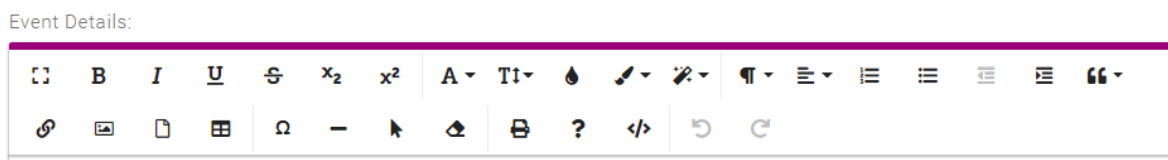
You can also copy and paste information into the area provided. If you are selecting to copy from a Word Document, you will see a dialogue box allowing you to select to keep the formatting from the Word Document or to paste it in as plain text. This will allow you to build the information area in a Word Document and copy it across to the event creator and maintain any formatting. Selecting "Keep" retains the formatting you set up in Word so is usually the preferable option. Selecting "Clean" will still bring in any images and numbering etc, only your font type and colours will be reset.

EVENT CONTACTS

Add contacts to your event so Members know who to contact regarding the event. To add an event, click on the "Add Contacts" button.
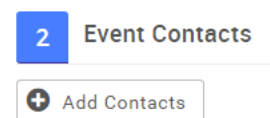
You will then be able to free type in details for a contact or you can search for an existing member in your Club. To do this, type in the name of the member and you will see all matching member records appear in a list. Select the relevant member. Upon doing so, you will see that all the fields on the form will be populated with the details of that member.

Be sure to amend the mobile and email address of the member if the details that are on their profile are private and there are generic "Club" contact details members should be using if they need to contact someone about this event (i.e. If the member has their personal email address on their profile but also uses a Club email such as events@canoeclub.co.nz). When you have finished making changes, click on "Done".

You can add more contacts, but only the one that is listed as "Primary" will be displayed as part of the event. To change the primary contact, click on the Edit pencil next to their name and tick or untick the "Primary Contact" box at the bottom of the pop-up.

EVENT SETTINGS
If you are setting up your event and want to make it public before tickets are available, you can select the "Notify me" check box which will allow users to opt in to be notified as soon as tickets are available for purchase.

If you expect that an event might get booked quickly or only have limited places available, you can turn on the waitlist functionality. This will allow members to opt onto the waitlist should all tickets be sold by the time they come in. You can then move them to other events when you add them.

PUBLICLY PUBLISHING ATTENDEE NAMES
You have the ability to make your events private or public. A private event means that it can only be seen by people who have been given the direct link to the event.
A public event means that it can be seen by anyone searching for events. Even if your event is public, you still have the ability to determine who can purchase a ticket to the event as listed in the Event Tickets Section.

You have the ability to turn on attendee publishing. If selected, when a member purchases a ticket, they are told that the event organiser likes to publish the names of attendees and they have the ability to opt out. If they opt out, they will appear as a "+ 1 more" on the list publicly available.

You can also set the display price for your events. You can set this to be the price range as determined by the tickets that you set up, you can hide the price, or you can set a defined price range. Click on the relevant line to make your choice. If you select User Defined Range, you will also need to enter in the ticket price range.

EVENT TAGS

Tags are searchable terms. When an individual is looking for an event, they will likely search for a Club Name, or the type of event i.e Sprint. Enter as many tags as you deem necessary into the Tags area to assist individuals in locating your event.

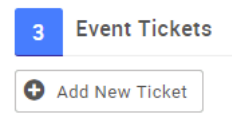Tags:

EVENT FIXTURES

Event fixtures is just a list of the Events that are on for the duration of your Event and the times that they are on. This is good for Events that have multiple races and categories. You can enter in each of the events by name, date and time. This is then a display on the event information. Alternatively you can just enter this information into the Event Details area.

ADDING TICKETS

Adding tickets to your event is what enables individuals to sign up to and pay for the event online. To add a new ticket, click on the "Add New Ticket". An editable line will then appear where you will be able to note the name of the ticket, the price and the quantity of tickets available. When you are finished entering these details, click on the green tick box.

After you have repeated this step for all tickets you will see a list of your tickets. To edit the name, price or quantity available, click on the edit pencil to the far right, make the changes then click on the green tick icon.

TICKET SETTINGS

To start building out the rules on the tickets, such as when they're available, who they're available to and when discounts and surcharges should be applied, click on the settings cog to the right of the ticket. This will open a new window to "Edit Ticket".

In this area for each of your tickets you can enter a description for the ticket, if it is an individual event booking ticket or a team entry ticket, the date and time for ticket purchases to close, the minimum and maximum number of tickets that can be purchased by an individual, restrict who can purchase the tickets, determine when discounts and surcharges will apply and also add in any forms to be completed as part of the ticket purchase.

Tickets	Price	Quantity available			
Senior	$80.00	99	⚙	✏	🗑
Junior	$50.00	99	⚙	✏	🗑
Concession	$65.00	99	⚙	✏	🗑

TICKET BOOKING FORMAT

Setting your ticket to Member format will allow individuals to purchase tickets to the event. Team Format will allow Club administrators who have access to Teams within their Club to enter teams into your event.

BOOKING END DATE, QUANTITY AND MIN/MAX PURCHASE

If you changed the timezone from the default you will need to update it on each of your tickets also. You must also enter a booking start and end date for your tickets. This determines the date and time that the tickets start and stop being available for purchase/selection.

Your Quantity Available field will populate automatically with the number entered into the basic set up however it can be amended here if need be.

You can also determine the minimum and maximum number of tickets that can be purchased by individuals. This will only apply per transaction. If you leave it as the default then it will be 1 ticket min and max. On top of this, you also have the ability to stop people from purchasing multiple tickets. This means that where an individual has already purchased a ticket, if they log in another time and attempt to purchase it again, the ticket will not appear for them.

If the Active tickbox is not ticked, your tickets cannot be purchased. This might happen if the original end date was passed and then updated. Always check this field when making changes to your tickets or copying events.

DESCRIPTION
The description you enter can be seen by the individual making the ticket selection. This is a good opportunity to note who this ticket is applicable for. I.e "Adult members over the age of 18 who hold current Club Membership"

PRICE
The Price will be automatically populated based on the information you entered into the basic set-up, however it can be changed here. This is the "Base" price of this ticket.

GST
If your Club is GST registered then you will need to click on the "Yes" button under Tax Options. The system is set to include the 15% in the total amount.
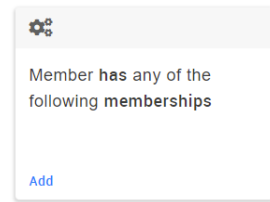
RESTRICTIONS
By using the restrictions rules in the same manner as with the Memberships section of Portal, you are able to determine who can or cannot see the tickets you set up.

Refer to the Restrictions, Discounts and Surcharges Administrator Guide for detailed information on these rules.

A common rule would be to restrict the purchase of tickets to Members who hold current membership with your Club, Only. To do this, click on the "Add New Purchase Rule" button. Enter in a Description. This can only be seen by Club Administrators. Then click on the "Add New Rule" button. This will open up a pop up where you will be able to select a Rule from different categories. To understand these categories and their functions better, refer to the Purchase Rules and Restrictions Guide. For this rule, we will select from the Membership Rules and click "Add" on the "Member Has any of the Following Memberships" tile.
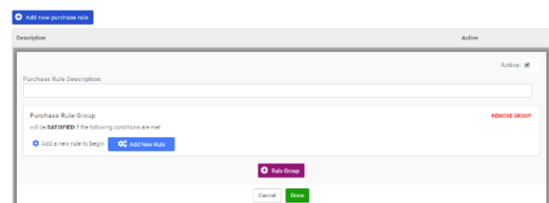
This will then place the rule in the Purchase Rule Group. You will then be able to select from a list of the Memberships that are set up at your Club. If you simply want to restrict the purchase to someone who holds ANY membership at your Club, Click on the "Any Club Membership" tick box from the available selection. Alternatively, you can select specific memberships. Click on the "Done" button when you have finished adding your restrictions.

If you want to add multiple rules to the purchase restrictions, they will need to be grouped together. For example, if you want the purchase to be restricted to individuals who hold current membership AND are over the age of 18, you will need to continue to add the rules within the one group by clicking on the "Add New Rule" button and creating the rule within the one "Group". If the rules are listed separately when you look at the ticket, it means that they are applied in an "Or" fashion – in that the individual must meet one OR the other to be eligible to purchase.

DISCOUNTS

The discount rules are applied in the same manner as the purchasing restrictions are applied. The only additional step with discounts is to note the amount of the discount. Click on "Discounts" under 3. Ticket Restrictions, Discounts & Surcharges.
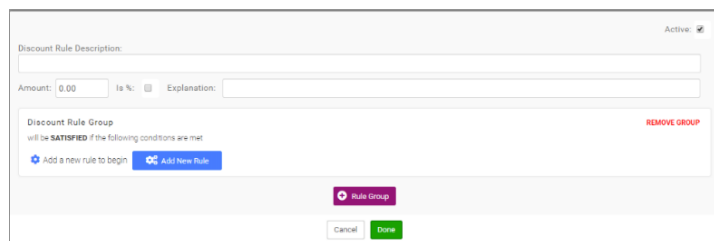
Then click on the "Add New Discount Rule" Give your discount a description (this can only be seen by the club), an explanation (this can be seen by the individual making the purchase) and then enter the amount of the discount. This can be either a percentage discount of a dollar value.

The amount entered is the discount that will be applied. Not the total amount that the ticket will be reduced to. To make your amount a percentage, for example 50%, enter in 50 into the amount field, then click on the tick box next to "Is %". You will then need to click on the "Add New Rule" button to select the rule to add.

SURCHARGES

Surcharges are applied in the same manner as the discounts. Click on "Surcharges" under under 3. Ticket Restrictions, Discounts & Surcharges. Then click on the "Add New Surcharge Rule". Follow the steps above listed on how to add a discount.

One of the most common surcharges is the Non-Member fee. You can set a rule on the tickets to apply a surcharge to individuals who do not hold current Membership with your Club.

To apply this discount, select "Discounts" then click on "Add new discount rule". Give your rule a description i.e Non Member Fee and then also an explanation. These can be the same. The text entered into the Explanation field will be seen by the individual, whereas the description will only be seen by the Club.

If the surcharge amount is a dollar value, enter this amount into the "Amount" field. If it is a percentage to be applied on top of the ticket fee, enter the amount then click on the tick box next to "Is %".

Click on "Add New Rule" and from the available options, click on "Member does not have any of the following memberships". You will then see an empty field. Click on this field and select if you want to apply the surcharge based on if someone has no Club Membership. Click "Done" when finished. Repeat these steps with all of the tickets you need to set up and all of the Purchase Restrictions, Discounts and Surcharges that need to be applied.
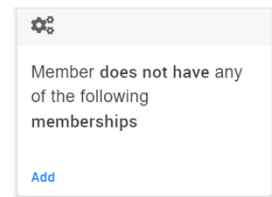
You can opt to display tickets even if the Restriction Rules prevent them from being purchased by a member. For example, if it only available for people who hold current membership and someone without membership comes in, rather than showing a message that there are not tickets available, you can opt to show the tickets, even though they cannot select to purchase one, and have a display message. This is also the message that will show when there are no tickets available to the member because all available tickets have already been purchased.

SORTING TICKETS
To rearrange the order of the tickets you have created, utilise the up and down arrows next to each ticket to move each ticket into your desired order.
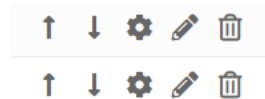
EVENT PREVIEW
You can preview what your event will look like at any time by clicking on the "Preview Button" to the top right of the Event Set-up page at any time. You will see a screen similar to the below which will show your event location, available tickets and any other details that have been added about the event.

SAVE EVENT
When you are satisfied with the set-up of your event and tickets, click on the green "Save and Publish" button. If you still need to add information you can select "SAVE AS DRAFT". You can then come back into the event and continue to edit it later. You can also save your event as a template and use it for future events. If you do this, ensure that you update the event and ticket date settings.

Upon selecting Save and Publish You will then be presented with a confirmation screen where you can opt to "Return to Summary" meaning return to the list of events for your club, "Add Another", being the option to add another event or "Continue Editing" which will return you to the editing screen for the event, though it will now be saved in your list of events.

PUBLISH EVENT

If you did not select SAVE AND PUBLISH, your event will remain in Draft status until you chose to publish them. This means that no one can see or purchase tickets to an event until it is published. When looking at your list of events, click on the arrow down icon to the far right of the event and select "Publish". You will be able to see the current status under the "Status" header.
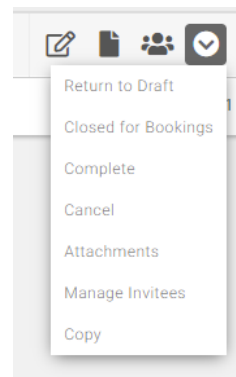
CLOSING YOUR EVENT
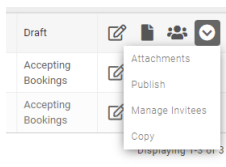
When your event is over, you can close it. To do this, clicking on the same icon as above, select "Complete". Tickets will automatically not be available based on the ticket end date in the settings.

COPY EVENTS

To save time, you can copy events rather than creating new ones from scratch each time. This is beneficial with regards to the Tickets specifically as the tickets and their rules and settings will be copied across when you copy an event.

It is IMPORTANT to change the ticket settings for each event, specifically the dates the tickets are available to and any date rules that you have applied to the tickets.

To copy an event, click on the arrow down icon to the far right of the event you want to copy and select "Copy". This will take you straight into the edit page for the event and the name of the event will be prepopulated with the name of the Event that has been copied with a leading "Copy of".

MANAGING EVENT ENTRIES

CHECKING EVENT ENTRANTS

To check who has enrolled on an event, from the event list, click on the small "people" icon to the right of the relevant event. You will then see a list of individuals who have been entered onto the event. Where an individual has purchased different tickets to the event, they will appear on a separate line.

Reference	Ticket	Booking Date	Booked By	Entity Id	Name	Email Address	Qty	Status				
CB000382	Ticket B	27/11/2019	NGB Admin	ME000009	NGB Admin	samantha.denmeade@pad...	1	Booked	▤	✱	✕	⊘
CB000381	Ticket A	27/11/2019	NGB Admin	ME000009	NGB Admin	samantha.denmeade@pad...	1	Booked	▤	✱	✕	⊘

ADDING EVENT ENTRANTS

To add Members to the event on their behalf, click on the "Create Booking" button at the top of the screen.

The number of tickets you have will determine the look of the next page. Where you have more than one available, you will see each of them and to the right of each ticket name, you will see "Add member". You will then be presented with a pop-up box.
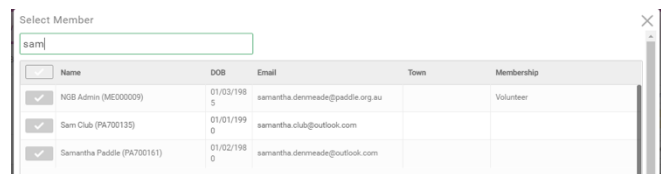
Type a name (first or last) into the search box and hit the enter key. All matching records will appear in list form. They will be required to have a profile in the portal already.

Click on the tick box to the left to add the relevant member/s to the event. When you have finished making all selections, click on the "Done" button at the bottom of the pop-up.
After you click "Done" you will see a list of the member names under each of the tickets you selected for them.
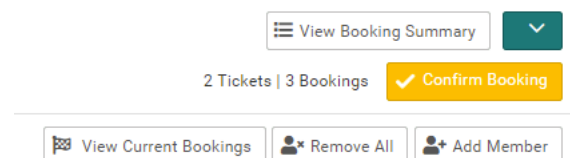
To finalise the order, click on "Confirm Booking". You will then receive a pop up prompting you to go to the check out. Proceed to finalise the payment (where there is a monetary figure). This will then secure the bookings.

EXPORTING ATTENDEES LIST

While in the Managing Members area, there is an "Export Attendees" button. This will export a csv. File with all your attendees and their ticket details including any information that was answered as part of their ticket purchase.

EMAILING MEMBERS

In the manage members area, you can email members direct from within an event. This is useful for times when an event is cancelled or to email reminders to participants. Click on the tick box to the left of the members names then click

on SEND EMAIL. Select either your email or the club email address in the FROM field, add cc/bcc email addresses as required by clicking on the + CC & BCC link and entering the email address/es into the relevant fields. Enter a subject line, then enter the email content into the content box. If you want to send an attachment, drag your file/s to the section at the bottom, of click to upload files from your device. When you are happy with the email, click on the SEND button at the bottom.

WAITLIST & TRANSFERS

WAISTLISTS

The waitlist is designed for members to note that they are interested in an event, where all the tickets for that event have already sold.

To view the members on a waitlist, click on the far-right icon when in the event summary list and select VIEW WAITLIST. You will then see a list of any individuals on the waitlist by the ticket they have selected.

TRANSFERS

If an event registrant needs to move from one ticket type to another, or from one event to another, this can be done via the Copy function.

From the Manage Bookings screen, select the tick next to the member's registration record and navigate to the yellow Copy button amongst the menu options towards the top of the screen.

Search for the event to which the registrant is moving (this may be the existing event). Search by either the event name, or by the Event ID.

Select the relevant ticket for the registrant, and whether you wish to transfer them directly to the event, or to the event's waitlist (in most instances, this will be directly to the event).

> Choose a ticket shown below to transfer
>
> TICKET 3
> 05 AUG 2023
> $50.00
>
> TICKET 4
> 05 AUG 2023
> $60.00
>
> ⦿ Transfer directly onto event
> ◯ Transfer to event waitlist

Click Done to complete the transfer.

Club Administrators must note some important housekeeping associated with transfers:
- Completing a transfer overrides any restrictions on the destination ticket. If the registrant wouldn't normally qualify for registration based on the ticket's restrictions, the club administrator completing the transfer will still be able to move the registrant.
- A transfer doesn't automatically cancel the original booking. Once the transfer is complete, the Club Administrator actioning the transfer should cancel the registrant's booking from the original event. This is in order for the Event Attendees (CSV) report to show the most accurate registrant information.
- The original payment will still be reported against the original event. This is important for the club's Treasurer to note.

CANCELLATIONS & REFUNDS

A suite of new options have been added to each registrant record in the Manage Bookings screen. From left to right, these are:
- **Open Registration Form**: see any information captured via Field Management during the registration journey.

- **Passed**: Not relevant for club use.
- **Failed**: Not relevant for club use.
- **Cancelled**: Cancel the registrant's booking (see more below)
- **Refund**: Refund the registrant's event payment (see more below)

CANCELLED

If the event registrant wants to cancel their booking, click the Cancelled symbol to launch the cancellation slide-in window. Select the most appropriate reason for the registrant's cancellation, and if you want to make that registrant's ticket available for purchase again, select Yes under Update Available Ticket Place.

Reason for cancellation
- Inclement weather
- Lack of attendance
- Venue issues
- Security concerns
- Travel restrictions
- Financial issues
- Technical difficulties
- Other

Update Available Ticket Place
- Yes
- No

The cancellation slide-in window also gives the administrator the option to bulk refund all bookings in the event has been cancelled. Administrators have the option to choose between a full or partial refund (a percentage of the original fee) for all registrants.

REFUNDS

If the registrant requires a refund for their booking fee, select the Refund symbol to launch the refunds slide-in window. Administrators have the option to issue either a full of partial refund (partial refunds are calculated as a percentage of the original fee paid).

To issue a full refund, leave the Refund Type as Full and click Done to process.

To issue a partial refund, update the Refund Type to Partial and set the value as the percentage of the fee you wish to refund.

For example, if you wish to refund 90% of the original value, enter 90 as the percentage value to be refunded.

| Refund Type	Give a percentage value
Partial Refund	90.00

EVENT BOOKING OVERVIEW FORMS
From the menu, locate and select the "Field Management" tile. When the page loads, make sure you click on "Event Booking Overview". Only forms set up in this area will be available for selection on your event tickets. Tickets set up under Profile Overview cannot be copied to Events so be sure to take care here.
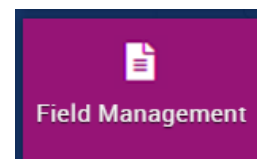
On the new page, click on the "Add New Form" button.
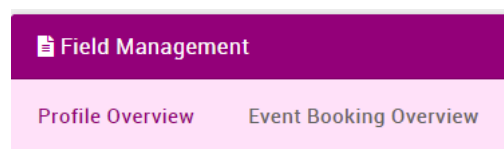
FORM NAME & ICON
Give your form a name. This will only be seen by Club/Event administrators when viewing the event tickets and selecting a form and when viewing the member answers. To select an icon, click on the "Choose Icon" button and scroll through the options or type words into the search bar to reveal any matching icons. Click on your chosen icon.
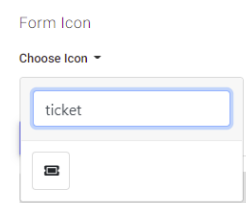
SECTIONS AND FIELDS
A section is an area of text with a Header and Sub Header. Use this to create a preamble for your questions, like the example shown to the right.
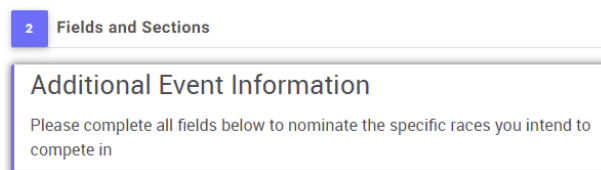
"Fields" are the questions being asked/fields for individuals to provide information. There are 9 different answer types you can select from:
- Short Answer*
    o This is a free text field that allows the member to enter anything they like in a small space.
- Paragraph*
    o This is the same as the Short Answer however it provides larger area for longer answers.
- Numeric Answer*
    o This provides the member with a field that they can only answer numbers into.
- Checkboxes#
    o Your Club defines the answers available and the member chooses as many as they want.
- Multiple Choice#
    o Your Club defines the answers available and the member can choose only one of these.
- Dropdown#

- o Similar to the Multiple Choice in that the Club defines the available answers however the member will select their choice from a dropdown box (max 1 answer per dropdown).
- Date*
  - o Presents the user with a Date Picker Tool (calendar). Only a date can be entered in here.
- Tick box
  - o This is a Single Tick box that is presented to the member. Ideal for Terms and Conditions (i.e., I have read and agree to the Club Terms of Membership as provided for on the Club website.
- Yes/No
  - o This is the same as the Dropdown however it is prepopulated with Yes and No.

When you click on the "Add Field" button, the default selection for answer type is "short answer". If this is not the type of question you are asking, change the selection from the drop-down box. You will see the words "Label Text" When you click on/around this area, you will see that the text is highlighted. This is where you will enter your question (making sure to remove the words "Label Text").
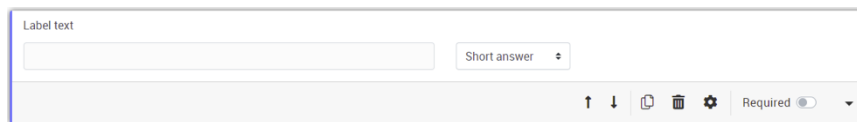

You have the ability to make any of your questions mandatory by clicking on the toggle switch next to "Required".

When you are happy with the form and all questions, click on the "Save" button. This form will now be available for selection when in the settings area of your event tickets.
The next step is to define what the column header will be for this field when you run reports. By default, it will populate with what you add as the field name, but you can update this to be shorter or more relevant/user friendly for when you are running reports. Simply update the information in the unique identifier field when setting up, or in existing forms.

CONDITIONAL LOGIC
Conditional logic is the ability to set conditions on the fields so that they only appear if the answer to a previous question meets a condition i.e. If member answers YES to "do you have a medical condition" then SHOW "please provide details". This way only fields that are relevant will be displayed. You can add conditional logic to existing forms and fields as well as new ones.
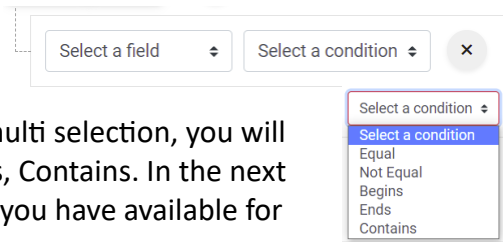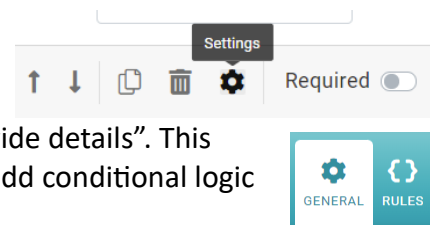

Click on the Settings Cog for any field and a side panel will open up. Click on the "Rules" tab.
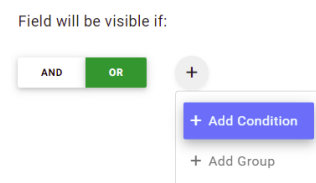
To enable the selection of fields for the logic, you will have to save the form if you have added any new fields. Only after saving will the fields be available in the logic area. Click on the "+" button and select + Add

Condition. You will then see a select a field box. Click on this to see questions in your form. Select the relevant question.

The options that you see will depend on the question type for the field you have selected. If it a multi selection, you will be able to select from; Equal, Not Equal, Begins, Ends, Contains. In the next field you will be able to select from the answers that you have available for that question.

Make you selection and click DONE at the top right of the panel to save this condition. When you have conditions on a field, a small icon will appear in the upper right corner of that field on the form.