Managing your Event Module: Event Posting and Online Registration

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Event Module Overview:

The event module:

- Allows club event planners to post club events on the SAA event page and on their SAA-hosted club webpage
- Allows people to RSVP online for free events
- Accepts credit card payments for events that charge fees (bank account and Automated Clearing House or ACH form required)
- Enables a club to email all event registrants
- Enables the club to keep track of event registration, print registration lists and nametags
Initial Setup

All official club and online groups are provided with an event module. However, only official clubs that have registered a bank account with the Stanford Alumni Association can process event fees online. Online groups and official clubs with no bank account will be able to create RSVP-only events. If the events charge fees, those groups should make arrangements to collect the registration fees via check or at the door.

Online payment

If you are an official club and would like to take credit card payments online, please contact your regional manager for an ACH form.

If your club has already been collecting fees online (such as club dues, for example), an ACH form has already been filed for your club. Check with your regional manager if you are unsure.

A monthly transfer of funds to your club's bank account will typically occur during the first week of the month. This amount will be the total money received though online credit card payments minus the 3% fee the credit card companies charge.

Enabling the Event Module

Official Club with an enabled event module and calendar:
To enable your event module, log in to the SAA website using your username and password. Enter the Groups section of the site then click the "My Groups" link on the left hand menu. Your group or official club will be listed there.

Enter your group page and click the “Manage Group” link on the right-hand menu:

**Washington DC Stanford Association**

*Contacts: Alice S (send message), Christopher S (send message), Kevin C (send message), John S (send message)*

*Region: Washington DC, Maryland, Virginia, and West Virginia*

*Members: 952 Member(s)*

*Email: wdcsta@stanfordalumni.org*

Whether you want to meet new people, reconnect with fellow alumni or explore great D.C.-area activities, the Washington DC Stanford Association (WDCSA) has something for you.

*Join Today*

From here, you can enable your event module by clicking the “Enable Events” button:

Select “Yes” for both options, then save. The event calendar is not required, but it’s a helpful feature for visitors to your site who want an overview of group offerings.
Setting up an Event

Once you enable the event module for your group, you can set up a new event or manage current events from the same “Manage Group” admin window:

Choosing “Create a new event” takes you straight to the event setup window. Choosing “Manage events” takes you to the event admin panel where you can clone an event, manage a current event, or create a new event.

Washington DC Stanford Association: Admin Panel

Events Module Settings:
- Enable Events for this group: Enable / Disable
- Use Event Calendar for this group: Yes / No

Save
Create Event

Event Quick Search

Keyword:  
Date From:  To:  Include past events

Search

<table>
<thead>
<tr>
<th>Event Name</th>
<th>Start Date</th>
<th>Category</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>How To Create a Scheduled Plan</td>
<td>03/24/2012</td>
<td>Faculty &amp; Educational Events</td>
<td>Clone</td>
</tr>
<tr>
<td>Created by: Dr. William Manson Peagram</td>
<td></td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>Updated By: Dr. William Manson Peagram on 02/13/2012</td>
<td></td>
<td></td>
<td>Report</td>
</tr>
<tr>
<td>PAC Symposium (Pending)</td>
<td>03/30/2012</td>
<td>Conference</td>
<td>Clone</td>
</tr>
<tr>
<td>Created by: Mr. Melvin Bell</td>
<td></td>
<td></td>
<td>Edit</td>
</tr>
<tr>
<td>Updated By: Mr. Melvin Bell on 03/05/2012</td>
<td></td>
<td></td>
<td>Report</td>
</tr>
</tbody>
</table>
**Basic Event Posting**

A basic event posting has all the necessary logistical information for your event but does not have online registration. When an event posting is created, it is displayed on the official club or group homepage, the master event listing page, and the “Where I Live” page, making it easy for alumni to find your event.

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**Big Game Telecast Party**

**Event Details**

- **Date/Time:** Sat, October 20, 2012 05:00PM - 08:00PM
- **Venue:** Wild Goose Happy Times Bar and Grill
- **Location:** 613 Pennsylvania Avenue Southeast, Washington DC 20003
- **Registration Period:** 03/05/2012 - 10/20/2012
- **Price:** Club members pay $10 at the door. Includes appetizers and one drink ticket. Non-members pay $15.
- **Contact:** Ms. Alejandra Salaices salaices@stanford.edu 650-498-6215

Join the Washington DC Stanford Association for our 2012 Big Game Telecast party! The Stanford Cardinal has had a great season -- if you haven't had a chance to join us at our weekly viewing parties, this is the one you don't want to miss! Join your fellow Stanford alumni to watch the Card face off against our ultimate rivals. Friends and family welcome!

**Other Details**

Our venue is family-friendly, but children under 15 should be supervised at all times.

**Directions/Parking**

Metro stop: Eastern Market metro station. Parking: $10 at the corner lot, all night. Free parking three blocks south by residential area (if you're lucky!)
When you select “Create a new event”, you will enter the details tab of the setup page.

Required fields are denoted by an asterisk (*).

**Event name**: The name of your event.

**Upload new picture**: Upload a picture for your event. If you do not upload a picture, it will default to your group logo. This picture will be used for any SmartMail Lite emails created from an event report.

**Short name**: For official clubs only, creates a shorter URL for your event, so that your event URL reads http://alumni.stanford.edu/events/details/shortname. This is not required and will default to the event id number if you do not create a short name.

**Alternate URL**: If your event has been created elsewhere (such as Facebook) you can enter your event link here to redirect people to that page instead of the event details page.

**Event Categories**: Select the *single* category that fits your event best. Event categories help people looking for your
type of event find your event more quickly from the event search page.

**Contact name*, email* and phone**: The event planner to contact for event or registration questions.

**Short Description***: Limited to 2,500 characters, the short description should be a brief snapshot of your event. The “OtherDetails” section is the appropriate place for a full description.

**Other Details**: Place the full event description, such as a talk description, speaker biography, check payment instructions, etc. in this section. Pictures can be inserted here as well, by using the icon. The character limit is 10,000.

**Start Date***: Your event start date and time.

**End Date**: Your event end date and time.

**Price Summary**: A quick overview of the price structure. For instance, if you plan to have a range of prices, you could say “$5-$15. Includes talk and game ticket.” The character limit is only 100, so keep it brief. If you take online payments, a full description of prices will be displayed in a different section of the page. If you plan to take checks or other RSVP information, you can go into detail in the “Other Details” section.

**Should this event be displayed in public**:

- Yes
- No

This setting ensures your event is visible to all visitors of the master event.
If not selected, this event will only appear on your group website.

**Allow other groups to market:** This setting allows other groups to display your event on their group page. This is helpful for cross-marketing between groups if, for example, an event has been organized by multiple groups. The organizer name stays the same, so it is very clear which group set up the event.

**Is this a virtual event?** If your event is virtual, such as a webinar or a conference call and does not have a physical location, select “yes” here to bypass the required venue fields.

**Venue name:** The name of your venue. If this is an alumni home, SAA standard listing practice is “Home of John Smith, ’89, and Jane Noble, ’87.”

**Country**, **address**, **city**, **state**, **zip:** Required fields. If incorrect, the mapping function won’t work.

**Directions:** Enter helpful information such as driving directions, parking options, metro stops, etc. in this area. If you do not enter any information in this field, it will not be displayed in the event posting.
If you don’t wish to take online registration (whether paid or free), you can save and publish. Select your publish status as “Active” if you are done or “Pending” if you still wish to add details before you post to the public. If you save at this point, you will have completed a basic event posting.

Notice that there is no registration button. The options under “Event Actions” are only viewable to event organizers. Finally, don’t forget to tag your event with relevant key words so that people can search for your event easily! To learn more about tagging, refer to the FAQ page at the end of this document.

**Event Posting with RSVP**
Event Options
The details described above comprise a basic event posting. To set up RSVP functions – for both free and paid events – you need to enable Registration under “Event Options.”

Registration Start & Stop dates: Enter the dates for which you will be collecting RSVPs or online registration. The registration start date defaults to today’s date. Note: if your registration start date is set for a future date, you will not be able to test your registration setup. We recommend leaving the default registration start date as is.

Who can register for this event?
All

Who can register for this event: This allows you to select who can register for an event. The default “All” allows alumni
and non-alumni guests to register. We highly recommend leaving this option set to “All” for most events.

For a private, group member-only event, select “Group Members.” This means that guests who are not group members will not be able to register.

The Stanford alumni/students option only allows alumni and current students to register. The “School” options apply only to events set up by the Graduate School of Business and the Stanford Law School.

**Allow extra tickets:** Allows registrants to buy extra tickets without registering a specific guest through the “get extra tickets” function in the registration screen. Some of the best uses for this are sporting events where someone may wish to purchase upwards of 10 tickets. **Note that this does not set a limit on people registering named guests through the “add a guest” function.**

**Max no.:** The maximum number of extra tickets a person can purchase. It’s important to set a limit to extra tickets for events with a very limited number of seats where one person could hypothetically buy the bulk of tickets for private distribution.

**Allow send regrets:** Turning this function on allows people to send regrets with “sorry, cannot attend.” These responses are logged into a specific registration report, Club Membership Event Invitation #3041, so that they may be exempt from follow-up marketing SmartMail Lite emails sent from this report by the club. To learn more about “send regrets”, refer to the “Event Reporting” guide.

**Will you be asking questions:** Selecting “Yes” will enable the question set-up tab. This will allow you to ask questions during the registration process (such as entrée choice, for example).

**Will you be charging fees:** If you are taking online payment for this event, choose “Yes.” If you are simply taking RSVPs online, if the event is free or if payment is being charged via check or at the door, select “No.” Selecting ‘Yes’ will give you the option to set up different price options on the next screen. **Note: only official clubs that have filed an Automated Clearing House (ACH) form with SAA have the ability to take online payments.**

**Do you want to promote your group:** Enables a pop-up window during registration for group non-members only, allowing them to join the group if they choose. Current members will not see the pop-up window.

**Promotion message:** Is enabled only if you have selected “Yes” for the option “Do you want to promote your group.” Enter the message the registrant will see in the promotion pop-up window.

**Do you want the registrant’s notes emailed:** During the registration process, registrants can enter notes for the event
contact. This option automatically sends these notes to the event contact without having to run a registration report to see people’s notes. *We highly recommend leaving this enabled.*

**Will you display Look Who’s coming:** Enables the “Look Who’s Coming” display for your event posting.

- Include guests: allows guest names to be viewable in “Look Who’s Coming.”
- Will be displayed after x individuals: set the number that will automatically enable the “Look Who’s Coming” display.

* Note that individual registrants can elect whether or not they want their names listed in the “Look Who’s Coming” section. This explains why there may be less names appearing publicly on this list than there are actual registrants.

**Is there a capacity limit for this event:** Select yes or no. If there is a capacity limit, set the capacity number in the box and at what percentage you would like to receive a warning.

**Capacity message:** Becomes enabled if you have set a capacity limit. Enter the message you would like registrants to see if the event has reached capacity.

*How does capacity work?* If you set a capacity number, registration will automatically close when that number is reached. No further registrations will be allowed by the system and people will be presented with the capacity message. Please note that balance due registrations count toward your capacity number. If a registered person cancels their registration, or you set a higher capacity number, registration will automatically re-open.

Once you have finished selecting your Event Options, select “Save and next.” If you selected to ask questions, you will be taken to the questions tab. If you selected to charge fees online, you will be taken to the fee tab. Note that the RSVP option is labeled as “Free” – so it’s important to clearly state your price option in the event description if registrants are to pay at the door or by check.

**Online payment: Fee Page**

Official clubs with an active bank account and a corresponding ACH form filed with SAA will have the option to take online payment for events. In the following screenshot, note how the Event Activities box details the various price options. For this reason, you can keep the “Price” field in the description short, since the fees are outlined in this section.
To set up online fees, select “Yes” for the “Will you be charging fees” question during Event Options. You will be presented with the fee setup page.
When a person is registering for an event, they are only presented with the pricing options for which they qualify. For example, based on the structure above, a non-member who is a young alum would see the option for the general and young alumni price, but not for the member price.

**General Prices:** These are pricing options viewable to all, whether member, non-member, alum, non-alum, etc. If you are charging one price only, use general pricing. If you need to display other prices for which a category has not been created (for instance, if you have a club member pricing but do not use your club’s membership module) you can rely on the honor system and use a general price as well.

**Alum/Alum Guest:** Special pricing for alumni and their guests. In order to get alumni guest pricing, the alum must be the primary registrant entering his/her guest’s information.

**Student/Student Guest:** Special pricing for current Stanford students and their guests. In order to get guest pricing, the student must be the primary registrant entering his/her guest’s information.

**Non-Alum Price:** if you have not set a general price, and your pricing differs between alumni and non-alumni, you would use this field to set an alternate non-alumni price.

**Member/Member Guest:** Special pricing for club members and their guests. In order to get club guest pricing, the

---

<table>
<thead>
<tr>
<th>Show</th>
<th>Type</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Checked</td>
<td>General Price</td>
<td>Big Game Telecast Party - general admission</td>
<td>$10.00</td>
</tr>
<tr>
<td>Checked</td>
<td>General Price</td>
<td>Big Game Telecast Party</td>
<td>$0.00</td>
</tr>
<tr>
<td>Checked</td>
<td>General Price</td>
<td>General Price 3</td>
<td>$0.00</td>
</tr>
<tr>
<td>Checked</td>
<td>General Price</td>
<td>General Price 4</td>
<td>$0.00</td>
</tr>
<tr>
<td>Checked</td>
<td>Alum Price</td>
<td>Alum Price</td>
<td>$0.00</td>
</tr>
<tr>
<td>Checked</td>
<td>Alum Guest Price</td>
<td>Alum Guest Price</td>
<td>$0.00</td>
</tr>
<tr>
<td>Checked</td>
<td>Student Price</td>
<td>Student Price</td>
<td>$2.00</td>
</tr>
<tr>
<td>Checked</td>
<td>Student Guest</td>
<td>Student Guest Price</td>
<td>$0.00</td>
</tr>
<tr>
<td>Checked</td>
<td>Non-Alum Price</td>
<td>Non-Alum Price</td>
<td>$0.00</td>
</tr>
<tr>
<td>Checked</td>
<td>Member Price</td>
<td>DC Club Members</td>
<td>$5.00</td>
</tr>
<tr>
<td>Checked</td>
<td>Member’s Guest</td>
<td>DC Club member guest</td>
<td>$5.00</td>
</tr>
<tr>
<td>Checked</td>
<td>Non-Member Price</td>
<td>Non-Member Price</td>
<td>$0.00</td>
</tr>
<tr>
<td>Checked</td>
<td>Children Between</td>
<td>0 and 0</td>
<td>$0.00</td>
</tr>
<tr>
<td>Checked</td>
<td>Children Under</td>
<td>(Age is automatically set to the lower age from the line above)</td>
<td>$0.00</td>
</tr>
<tr>
<td>Checked</td>
<td>Class Year From</td>
<td>2001 and 2011</td>
<td>$5.00</td>
</tr>
</tbody>
</table>
member must be the primary registrant entering his/her guest’s information. **Important Note:** this pricing structure only works in conjunction with the club membership module. If your club membership module is not up-to-date, do not use this option.

**Non-Member Price:** If you have not set a general price and your pricing differs between members and non-members, you would use this field to set an alternate non-member price.

**Children Between:** Used for children’s pricing and sets the age range at which the guest is eligible for child pricing. **Note:** this works in conjunction with the “Age” field during the registration process. If the registrant does not set an age for their guest, they will not see this option.

**Children Under:** Is automatically set at the lowest age used in “children between.” For example, you would use this option if you had different fees for children under 3 years old than children between 3 and 12.

**Class Year From:** Allows you to set a young alumni pricing option. For example, five years after graduation is a standard young alumni setting. Note that this will apply to undergraduate and graduate classes, so please note in the description if your preference is undergraduate classes only. **Note:** to create a young-alum guest pricing, use one of the general price options and clearly state this is a young alumni guest option only in the description.

**Additional Non-Event Specific Pricing**

Non-event specific fees allow you to set up fees which are not considered “ticket” options. For example, early bird discounts can be applied here and programmed to disappear after a certain date.

![Additional Non-Event Specific Pricing](image)

To set up a non-event specific fee, select “More Fees” to create a new listing.

**Show:** “Activates” the fee. If the fee is not shown, then it cannot be applied.

**Description:** Name the fee

**Amount:** The fee amount. **Note:** In order to create a discount, the fee must be negative.

**Note:** always make sure your discount is not greater than your base price, otherwise you will “owe” your registrants money. For example, if you have set a “free” student price and an early bird discount of -2 for everyone else, then in essence you would owe each student registrant $2. So you would need to set a base student price of $2 that would equal to $0 with the discount. Once the early bird discount ends, you can then change the student price back to $0.

**Required:** Makes the event fee pre-selected so that all registrants will already see this fee applied. Early bird discounts and the like should be set to “required.”
Available From and To: The dates for which the fee should be available/active.

Note how the fee is displayed during the registration process. It is a required selection, so it has been grayed out and cannot be de-selected. Once the registrant chooses their ticket option, the -$2 is subtracted from their price:

Once you have set up all your fees, click “Save and Next” to finish fee setup.

Event Questions
If you selected “Yes” for the “Will you be asking questions” option during Event Options, the Question setup tab will be available to you.

To set up a question, choose “Add New Question.”
Enter the text of the questions and selectable answers (if appropriate) that should be shown during registration.

**Question**

**Text:** Would you be interested in helping us plan our next telecast party?

**Sequence:** 10

**Answer Choice:**
- Multiple
- Single
- Free

**Response Required?**

**Audience:**
- All
- Primary
- Guest

**Keyword:**

**Answers**

Please enter your answers in the sequence that you would like them displayed during registration. New answers can be inserted into the answer list by changing the sequence before saving.

**Answer 1**

**Text:** Yes, I'd love to!

**Sequence:**

**Delete?**

**Answer 2**

**Text:** Not this time, thanks

**Sequence:**

**Delete?**

Add New Answer

**Text:** Enter your question in the text field.

**Answer choice:** Multiple allows multiple selections, single allows a single-choice answer, and free creates a text box.

**Audience:** If you would like only primary registrants to answer the question, select primary. For guests only, select guest. Otherwise, leave “All” selected so that the question must be answered for each registrant. For example, an entrée question is generally required to be answered by All.

**Response required:** Makes the question a required part of the registration process – a registrant cannot move forward without answering the event question(s).

To input answer choices, click “Add New Answer.” Create as many answer boxes as necessary.

**Answer text:** Enter your answer choice here.

**Sequence:** Changes the order in which answers are listed.

**Delete:** Inactivates an answer box.

When finished, click “Save and Next.” Your question will now be part of the registration process.

Registrants will see your question during the registration process as follows:
Notifications

If you have set up an RSVP option, the notification tab will display so that you may edit the email confirmation messages received by registrants.
Once a person successfully RSVPs for an event, they will receive a confirmation email. The default confirmation message includes the date, time and address of the event, refund policy and the number of tickets the person has purchased or RSVPd for. You can edit the text at any time.

**Tip:** It’s a good idea to add important information to the email confirmation message, such as whether ID or special parking is required, etc. Another good use of the email notification is to give out home addresses if the venue is a private location that should only be given to those registered.

**Cancellation email text:** Ensure you update the cancellation message a registrant will receive if they cancel their registration. If, for instance, no refunds will be given, the cancellation message should state this clearly. **Note:** the system can’t process a credit card refund to a person who has cancelled their registration – funds move directly from the system to the club’s bank account. The club must reimburse a cancellation via check. A good practice is to edit the cancellation email to say exactly whom the person should contact for a refund.

**Registration reminders:** Enables an automatic email reminder to be sent to fully paid registrants. Select the date on which you would like the reminder to go out (5 business days is standard practice). You may edit the text of the email. Again, it is important to include any special information beneficial to the registrant.

**Frequently Asked Questions**

**Preview and View in Live Site**

Previewing your event will open a preview of your event posting without saving changes. If you are not sure how text formatting may look, previewing without saving can be useful. It does not appear in a new window. Make sure to use the “close preview” button on the upper-right hands side to safely close the preview. **Do not use your browser’s back button.**

Viewing in Live Site will prompt you to save your changes first, and directs you to your live event posting.

**Cross Marketing Events with Other Groups**

If you select the “allow other groups to market” option in your event setup page, other groups or clubs will be able to list your event onto their group page. Similarly, if you are interested in listing another group’s event onto your own site, find the event you’d like to promote using the event listing page, and select “List in Group Events.”
Events

A pop-up will allow you to confirm your choice, and pick in which group(s) you would like to list the event if you are an event planner for more than one group.

Searching for Events

When someone searches for an event from the event listing, any word in the “short description” field of your event is searchable. Your venue name, city, state, and organizer are also searchable key words.

If you would like to add more “key words” to your event, tag your event. For example, a Viewing Party in London could be tagged with “sports”, “Great Britain”, “Pac-12” or other text that may not necessarily appear in the short description.

Waiting Lists

With the simplified capacity function, there is no longer an option to manually turn capacity on if the event has not reached its limit. The system is truly first-come, first-served. If the event is at capacity and someone cancels their ticket, a spot will immediately become open – whomever is lucky enough to register next will get the spot.

If you have a popular event that has reached capacity, it is a good practice to regularly check the registration list to see if spots have opened up. Then you can manually change the capacity number so that someone else won’t take the open ticket as you contact whomever may be first on the wait list.

Cloning Events
You can clone an event by entering the group event management page and selecting “clone” beside the event which you would like to copy.

**Inserting Links**

The short description, other details, and directions boxes all feature a WYSIWYG editor that allows you to insert links.

To insert a hyperlink (text that is linked to a URL), first highlight the text you would like to link. The link option (🔗) will
become active.

Click to open the link insert box, enter your URL and click “Insert”.

![Link insert box]

Your text will now be hyperlinked. We recommend bolding and underlining any linked text:

**Other Details**

Learn more about Professor Zimbardo [here](#).

**Linking To an External Registration Site**

If you are taking online registration through another site (PayPal, for example), you can set up a basic event posting and hyperlink to your online registration page in the “Short Description” field. An SAA standard listing practice for registration links is to precede them with double angle brackets (>>). We also recommend bolding and underlining your hyperlink.

**Stanford Gala Evening**

**Event Details**

- **Date/Time:** Thu, March 15, 2012 05:00PM - 08:00PM
- **Venue:** McAllister
- **Location:** 30 N. Street, San Francisco CA 94110 | [Map address](#)
- **Registration Period:** 03/13/2012 - 03/15/2012
- **Price:** $29-45. Includes food and talk.
- **Contact:** Alegra Salaires
  salaires@stanford.edu
  650-498-6216

Join us for an elegant evening. Mingle with fellow alums and enjoy wine and gourmet food.

[>>Pay Online with PayPal](#)

This completes the event setup overview. For information on registrar functions and reporting, please refer to the Reporting and Registrar Functions guides.