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# Warning: Using Tablets And Phones

It is recommended that you do not attempt to create an event posting on a tablet or phone since many of the operations required (e.g. dragging and dropping images or finding images in a “folder” on your device or resizing an image by dragging its corner) can be problematic on a touch-screen device.

# Creating New Event Postings

Create a new event by duplicating an existing event or creating a new event from scratch.   
  
There are pros and cons to each approach; duplicating an existing event is generally recommended because most of the event settings will have been copied over but is also more prone to carrying over old information from the duplicated event into the new event (such as Reminder emails that have been edited).

## Creating A New Event By Duplicating An Existing Event

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| 1. From Admin view, ensure you are in the Home menu and select the Event List menu item as shown to the right. |  |
| 1. Scroll **down** to find an existing event that you want to base your new event on and click the **Duplicate** button for that event. |  |
| You will immediately be taken to the duplicated event. Notice that the event title begins with “**(copy)”**.  Click the **Edit** button to begin changing the contents of the duplicated posting for your new event. |  |

## Creating A New Event Posting From Scratch

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| 1. To create an event from scratch, click **on** the **Create new event** button, (circled in red).  If you are hosting a free event that requires only an RSVP from your registrants, you can create a **Simple** event.  If your event charges a registration fee, or has a registration limit, or requires additional registration information from your registrants, you should create an **Advanced** event.   Note: If you do not see the **Advanced** box you may need to zoom out. Your browser’s display magnification is likely set too high. |  |

# Editing The Event Details

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| 1. Edit or change the **Title** of the event as **described** below.   Remember to remove the **(copy)** prefix from a duplicated event title! |  |
| For **events that require registration**, the opening event title format is:  Committee Name: Event Title (Registration Opens [date]) . For **events that do not require registration** (e.g. Happy Hikers, TGIF, etc.), only “Committee Name: Event Title” is necessary. | |

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| 1. Select the appropriate tag(s) for the event.  **IMPORTANT: Select or deselect tags by clicking on them. Do not type any tags directly into the Tags box.** |  |
| The “**indoor**”tag is used to identify indoor events where vaccine records are required to be on file as the color **green**.  The “**waitlist**” tag is used to identify Waitlisted (i.e. Sold Out) events on the All Events Calendar as the color **magenta**.  If you’ve duplicated an event, it’s possible the event had been tagged as waitlisted so remember to deselect it when creating a new post by duplication.  Note: The “**waitlist**” tag will be manually set by the event administrator *after* the event has sold out and is described in the “How to Manage Your Event After It’s Posted” training guide.)  The “**public event**” tag is used to identify public events on the All Events Calendar as the color **blue** as a convenience to members and the public alike.   Select this tag if this event is in a public location *and* anyone can join in. Deselect this tag if this is NOT a public event.  The two “Alumni” tags do NOT perform any color identification functions on the All Events calendar but are primarily used by the VP of Communications (and other admins) to identify events in the WA event list.   For most events where alumni registration availability is delayed in order to give preference to club members, select the “**open to alumni delayed**” tag.   Select the “**open to alumni**” tag where alumni are eligible to register at the same time as club members. This is allowed *only* if the event’s capacity is sufficient to ensure that club members are not displaced by Alumni and must be approved by the VPs of Activities.  Note: the eNews tag is only used by the VP Communications to put a copy of the eNews on the calendar. Its color is **orange.** | |

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| 1. Edit the event **Location** as described below. | | |
| **Note: The security and privacy of those who volunteer to have Club events in their homes is a serious matter for the Club. If you have any questions about what to put in the Location box, do not hesitate to contact the Posting Committee Chair at** [**posting@sbnewcomers.org**](mailto:posting@sbnewcomers.org) **or the VPs of Activities at** [**activities@sbnewcomers.org**](mailto:activities@sbnewcomers.org)**.** | | |
| For events where both members *and* non-members need to know the location (e.g. public locations), put the actual event address in the **Location** box as shown to the right. You can also put the event address in the **Description** box in step 10. | |  |
| For events which address will be private (i.e. private homes), put only a rough location for the event in the **Location** box and put the actual event address in the **Additional Information** box in step 11 | |  |
| 1. Set the **Start date** and **Time** and the **End time** for the event. Leave the **End date** blank.  Note: this is NOT when registration for the event opens. That will be set later. |  | |
| 1. Set **who** can see the event’s registrants from the event page on the calendars.  Verify the List of event registrants checkboxes look like those on the right. |  | |
| **VERY IMPORTANT: Do not select “Show registrants who want to be listed to everyone”. This will make the event registration list visible to the “public” and Google will find it when they crawl the web.** | | |
| 1. **IMPORTANT**: Please ensure that “Do not add new guests to the contact list” is checked! |  | |
| 1. Use the **Description** area to advertise your event with both text and images/pictures.   When you click inside the **Description** area, the text and image formatting tools will be activated at the top of the box.   Refer to the following Guides for more detailed information on manipulating text and images:  [Adding and Formatting Text](https://sbnewcomers.org/resources/Documents/Training%20Guides/Adding%20and%20Formatting%20Text.pdf)  [Inserting Pictures or Images](https://sbnewcomers.org/resources/Documents/Training%20Guides/How%20to%20Insert%20Images.pdf) |  | |
| **IMPORTANT: Do NOT “copy and paste” (or link to) an image from the Web (or from your computer) into the Description box. Doing this might *appear* to work in some circumstances but when it does not it can result in images not being displayed correctly. Wild Apricot needs to have the original image uploaded to the website before it can properly handle the image.** If you haven’t already put the event location in the Location box, you can also put the address (and directions if desired) in this section but only if it’s OK to be seen by club members and/or the public before they register.  **IMPORTANT: For events in private homes, do *NOT* put the event location in this section. Instead, put it in the *Additional* *information* area in step 11.**  For events in private homes you *can* put something like *“This event will be held at a private home in the Riviera neighborhood. The actual event address along with any other important information will be included in your registration and reminder emails.”* Contact the Posting Committee Chair at [posting@sbnecomers.org](mailto:posting@sbnecomers.org) or the VPs of Activities at [activities@sbnewcomers.org](mailto:activities@sbnewcomers.org) if you need help or have any questions. | | |
| 1. Put any information you want *only* event registrants to receive, such as the event *address* if the event is held in a private home, directions to the event, etc. into the “**Additional event information…**” box. |  | |
| If this event does not require any additional information, please make sure this box is empty.  Note: The information put into this section is **NOT** visible on the calendar but is automatically inserted into both the Registration confirmation AND the Reminder emails (contrary to what the label indicates above). | | |
| 1. Click **Save** at the upper left of the page **before** going on to the next step. |  | |

# Reviewing The Registration Form Settings

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| 1. Click on **Registration form** in the **middle** of the page and then look at the contents of the **Common Fields** box. |  | |
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| If the Common fields look like the picture on the right you can skip to the next section.   If they don’t, click on the **Edit** button at the upper left corner and change the settings per the following instructions. | |  |
| Uncheck the **All common fields** checkbox if it is checked.  Make sure the **Alt. phone, Street Address, City, and Zip Code** checkboxes are not checked and un-check them if they are set.  Then confirm the **First name, Last name, Phone, SBNC Event Waiver** checkboxes are checked and set them if they are not.  If there will be menu choices which must be made at the time of registration, this is where you’d add a field to allow the registrant to select a menu. There are other functions for these fields when additional information may be needed. You can simply add a new field and set the parameters.  Note: The **e-Mail** checkbox is always checked.  Now click **Save**. | |  |

# Editing The Overall Registration Types & Settings

The following settings apply to the overall event and will override the settings for individual registrant types defined in the section that follows this one.

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| 1. Click the Registration types and settings   link in the middle of the page and then click the Edit button that appears in the upper left-hand corner in its usual position on the following page. |  |
| 1. Set the overall **Event registration limit** to the ***total*** number of registrants allowed for your new event’s venue.  Make sure the **Enable Waitlist** box is checked.  Make sure the **Multiple registrations,** box is not checked.  Make sure the **Payment method** **Online only** box is checked as well as the newly added **Automatically cancel…** selection. **This is very important since the Club only accepts online payments.**   Click the **Save** button. |  |

# Editing The Individual Registration Types & Settings

The following settings apply to each individual registration type, but some settings can be overridden by the settings in the Overall Registration Types & Settings section.  
  
The registration types described below may not be required in all events but it is a good idea to include them and simply disable the ones not being used so that when this event is duplicated, all the registration types are available for the next event.  
  
Registration types will appear on both the event registration list and the waitlist. This allows “Newbies” to be easily identified.  
  
For more details on Registration Types, refer to the “[Recommended Settings: Event Registration Types](https://sbnewcomers.org/resources/Documents/Training%20Guides/Event%20Guides/Recommended%20Settings%20Event%20Registration%20Types%20%202021.04.18.pdf)” document posted on the website.

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| 1. Most events will have four Registration types; Newbies, Newcomers, Alumni, and Working Members.  Note: If you need to add or change an existing registration type, please discuss this with your VP of Activities first.  Click Add type if you need more registration types than are displayed. Clicking on Add type *automatically* opens in Edit mode so you can immediately go to the next step. |  | | | |
| We will now look at each of the **Registration types** in more detail to make sure the settings are correct for each registration type. Start by clicking on any registration type and then click on **Edit** on the subsequent page (as shown in the picture on the right). |  | | | |
| 1. Adjust the settings for this **Registration type** as follows: | | | | |
| Set **Status** to **Enabled** if you want this Registration type to be visible and available for registration in this event or to **Disabled** if you do not. | | |  | |
| The **Name** should be descriptive of the registration type and will appear on the calendar and the event registration page. | | |  | |
| Recommended **Names** include but are not limited to:  **Newcomers** - This normally includes NewcomerMembers and ExtendedNewcomers, but *not* Newbies.  **Newbies** – Newbies are Newcomer Members with less than 90 days in the Club. (Note: This Registration type is necessary to identify Newbies on event wait lists.)  **Alumni** – Former Newcomer members who are in our WA database.  **Working Members** –Members of the committee who have volunteered to work at the event. | | | | |
| A **Description** is optional but if used will appear on the event registration page below the Registration label as shown in the picture on the right depending upon the Show/Hide settings. For **Newcomers**, **Newbies** and **Working** **Members**, you can leave the description blank as the labels are descriptive enough.  For **Alumni**, either insert “Alumni can register for this event 2 weeks after the event opens for Newcomers.” as shown to the right or leave blank if Alumni can register at the same time as club members. | | |  | |
| Set the **Base price** for this Registration type. Normally, all registration types should have the same price. | | |  | |
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| **Working Members** – Set this to the number of members that will be working at the event.   **Newcomers,** **Newbies,** and Alumni– Once the total limit is set, these two types will default to have a total equal to the overall total less the number of volunteers. | | | | |
| The **Waitlist** should be enabled for the “**Newcomers**”, “**Newbie**”, and “**Alumni**” registration types but **not** for the **“Working Members”** registration type. | | |  | |
| The **Taxes** checkbox should be checked to use the SBNC tax scope settings (disabled). | | |  | |
| Multiple registrations should be disabled. | | |  | |
| **Guest registrations** are normally not allowed for most events at the initial posting per the Club’s Policies and Procedures. | | |  | |
| However, if/when Guest registrations *are* allowed for your particular event at the initial posting, choose the settings shown in the picture on the right.  The Guest limit quantity should be determined for your particular event, typically ranging from 1 to 3. | | |  | |
| Although guests can only be registered at the same time the member registers and cannot be added later by the member, they *can* be added to the member’s registration manually by an admin if necessary. The Posting Group can help you with this if necessary. | | | | |
| The **Availability** settings will be different for each registration type.  For the **Newcomers** registration type, set the Availability to **ExtendedNewcomer,** and **NewcomerMember** as shown to the right. | | |  | |
| For the **Newbies** registration type, set the Availability to **NewbieNewcomer** as shown to the right | | |  | |
| For the **Working Members** registration type, set the Availability to **Extended Newcomer**, **NewcomerMember**, and **NewbieNewcomer** as shown to the right. | | |  | |
| For the **Alumni** registration type, set the **Availability** to **Alumni** as shown to the right. | | |  | |
| **Note: Do NOT allow Admins to register for Events. Admins must register for events using their personal membership**. | | | |  |
| Set the **Available period** when this Registration type can register for your event. | | |  | |
| For **Newbies** and **Newcomers,** the **From** date should be the same date that your event opens for registration (normally a Tuesday), while the **Through** date is typically the date of the event, but there are events where registration ends earlier than the day of the event to prevent last minute registrations.  For **Alumni**, the **From** date will normally be set to 2 weeks after the event opens for registration to club members. If the event’s capacity is sufficient to ensure that club members are not displaced by Alumni, the **From** date can be set to the same date that registration opens for Newbies and Newcomers. The **Through** date is typically the date of the event but there are events where registration ends earlier than the day of the event to prevent last minute registrations.  For **Working Members**, leave the **From** date blank and enter the day before registration opens in the **Through** date. This will allow Working Members to register for the event as soon as the event is posted on the Calendar. Committee chairs should encourage and ensure that Working Members register for the event *before* the event opens for registration to club members and alumni. | | | | |
| **If unavailable** should be set to “Show with special formatting”. | | |  | |
| Verify that **Cancellation** by registrants is NOT allowed! | | |  | |
| When done click the **Save** button at the top of the page and then click on the **Back** link on the following page to return to the Registration types and settings page.  **Repeat this step for each registration type.** | |  | | |

# Reviewing The Event Emails And Settings

Most of the content of the **Reminder** and **Event registration confirmation** emails is automatically generated using the information previously added to the **Event Location, Date, Start and End time, Description** and **Additional information** boxes. Please make sure that **all** the information you want to deliver to your registrants is contained in these boxes.  
  
This guide assumes that you have no need to edit these emails. If you do, please contact the Posting Committee Chair at [posting@sbnecomers.org](mailto:posting@sbnecomers.org) or the VPs of Activities at [activities@sbnewcomers.org](mailto:activities@sbnewcomers.org) for assistance

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| 1. Click on the blue Emails link in the middle of the page as shown in the picture on the right.   IMPORTANT: Do NOT click on the “Event emails” menu item at the top of the page. |  | | |
| 1. Although most events use only one reminder email (typically the **Reminder 1** email) you may use the **Reminder 2** and **Reminder 3 emails** in additionand schedule each one for different numbers of days in advance of the event.   The scheduling of these emails will be discussed a bit further down.  Let’s start the email review process by clicking on the Reminder 1 email link. |  | | |
| 1. Take a look at the reminder email displayed on your screen.   If there isn’t any information from a previous event and it looks similar in format to the picture on the right, repeat this for any other reminder emails you are using.  But if any of the reminder emails you are using have information from a previous event that you do not want for your event, try Editing the email template and choose “Restore from Default” and save the changes.  If the email still doesn’t look right, contact the Posting Committee Chair at [posting@sbnecomers.org](mailto:posting@sbnecomers.org) or the VPs of Activities at [activities@sbnewcomers.org](mailto:activities@sbnewcomers.org) for assistance restoring the “Default” emails. |  | | |
| 1. To schedule the **Reminder** emails, start by **clicking** the **Schedule** button for the *particular* **Reminder** email(s) you are using. | |  | |
| 1. Set the number of days before the event **that** this particular reminder email will be delivered. *For* most events 3 days is about right.   Then click the **Schedule** button. This will take you back to the page in the previous step where you will see that the **Schedule** button has now changed to a **Change Schedule** button.  Click on **Schedule** for any of the other **Reminder** emails you may be using and schedule these as well.  Note: since most cancellation requests occur after the *first* reminder email is sent, schedule the reminders to allow the Committee Chairs sufficient time to process the waitlist.  When you are done scheduling all of your event emails, go to the next step. | |  | |
| 1. With the settings shown the registrant will receive 3 of the email types shown but the event organizer will get copies of only the **Event** **registration cancelled** and **New waitlist registration emails** to minimize personal email inbox overload.   If, however, you want to receive these other emails feel free to add them. Please do not remove any of the emails sent to registrants.  Note: Because Wild Apricot can now be set to automatically cancel registrations if payment is not received within 15 minutes, the **Event registration pending** email is no longer required. | | |  |
| To change any of these settings, click the **Edit** button at the top of the page and change the settings.   You can then change the settings for copies of these emails but do not change any of the registrant settings.  Then click the **Save** button at the upper left of the page. | | |  |
| 1. If the **Event organizer** is already set to *your* committee go to the next step. Be sure to uncheck the box for copy emails according to routing settings. Otherwise, the VP’s of Activities or other Board members get all registration related emails.  If not, click the **Edit** button to change the **Event organizer**. | |  | |
| Then click the **Change** link. | |  | |
| In the pop-up box, search for “Event”, scroll down and select your committee, then click on the **Select** button at the bottom of the pop-up window.  When the pop-up window disappears click on the **Save** button displayed in the first picture above. | |  | |

# Confirm The Waitlist Settings

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| 1. Click on the Waitlist & settings link.  Verify that the **Waitlist management** is set to “Manually by administrator” and that **Information to collect** is set to “All event registration information”. If they are, skip to step 27. If they are not, click “**Edit**” and go to the next step. |  |
| 1. Set **Waitlist management** to “Manually by administrator” and set **Information to collect** to “All event registration information”.  Click **Save**. |  |

# Enable Registration And Make Event Visible On The Calendars

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| 1. Verify the **Allow registration** slider in the upper left-hand **corner** of the screen is as shown in the picture on the right.   If not, click where shown to allow registration as shown in the second picture on the right. |  |
| 1. Click the **Visible for: Admin only** link at the top of the page. |  |
| For a members-only event, in the pop-up *window*, select **Restricted** to determine who can view the Event details on the calendar and then select All membership levels.   At this point, everyone who is a member or an alumnus will be able to see the details of the event.   The public can only see what is on the calendar. If they click on the event, they get a “No access” notice.  Click **Save.** |  |
| 1. Click **Back** to get to the **Event list**, find your event and verify that it is **Enabled**, as shown in the picture on the right. |  |
| 1. Log into [sbnewcomers.org](about:blank) using your personal login, not your admin login, and verify that your event is visible on the calendar to members as well as to admins.  Hint: If you use another browser for your personal login, it will save a lot of time going back and forth between Admin mode and Public mode when logged in as an admin.   If you had the event open in another browser, after switching to that browser you should refresh the page to see the latest changes. | |

# If You Need Help

If you have any questions or doubts about this guide or whether all the settings for your event are correct, please contact the Posting Committee Chair at [posting@sbnecomers.org](mailto:posting@sbnecomers.org) or the VPs of Activities at [activities@sbnewcomers.org](mailto:activities@sbnewcomers.org) for assistance.