


Getting Started in OHANA

Events Setup for Online Registrations

You must have the necessary privileges to access the Events module

- 1) First go to your website.
- 2) Go to **Login**
- 3) Enter your **User Name** and **Password**
- 4) Click **Login** button.
- 5) Place your mouse over  in upper right tabs for the **Event**.
- 6) Select **Events** from the drop down.
- 7) Click **Add** to create a new listing from the **Manage Online Registration** screen
- 8) Enter the **Details** related to this Event.
 - a. **Title** (required) – will appear on Calendar grid (if that option is selected below) for example: “2013 Annual Conference”
 - b. **Status** (required to select one of these)
 - i. **Active** – when an event is marked “Active” it is ready to take registrations, so do not mark this until you have finished all the setup required.
 - ii. **Pending** – mark an event while you are adding all the details necessary to take online registrations. By default – all new events start in Pending status.
 - iii. **Closed** – if you are no longer offering online registrations – you can close the event.
 - c. **Description** (optional) – will appear when someone clicks on this item in the Calendar grid to get further details about the event/activity. You can add speaker or theme information along with any other details you want to convey to a prospective registrant. The WYSIWYG editor tools appear to help you format the text you wish to put here.
 - d. **Event Dates**
 - i. **Start Date** and **End Date** - enter this information so that the Item will appear on the proper date(s) on the Calendar. Remember, you must fill in both the start and end date fields.
 - ii. **Early Pricing Deadline** – if you offer an early bird discount for people who register prior to a certain date - enter the last day you will offer the Early Bird Discount so the system can help manage the price to charge on the web.
 - iii. **Date to Start Late Pricing** – if you charge extra to people who register at the last minute – enter the data that this higher pricing would take effect so the system can help manage the price to charge on the web.
 - iv. **Last Online Registration Date** – What is the last day you want to allow people to register on the web. The system will manage this for you so you do not have to remember to login and shut off online registration just prior to the event.
 - e. **Show on Calendar** – if you would like this event to be listed on the Calendar – mark it as **Yes** here. (You will not have to add another listing thru the Calendar module for this Event – the

Event module will blend in with the other listings). If it will take you some time to enter the details of the Event – mark it **No** here until you are truly ready for online registration to commence.

f. Cancellation

- i. **Policy** – here is a place to enter what your organization’s cancellation policy is
- ii. **Fee** – Do you retain a portion of registration fees when someone cancels? Enter it here. Otherwise leave it set to \$0.00

g. **Event Location** (optional) – this can be different from the information entered in the “Map Location” area below – such as the name of the location, ie: “Sacramento Convention Center”

h. **Show Map** – mark this “**Yes**”, for the map to be displayed on Calendar Listing page.

i. **Map Location**– this requires the actual physical address for the event so that the system can provide a map/directions to the location, when a visitor clicks on this event from the Calendar

9) **Before you hit SAVE button (at bottom of screen)**– go back to the top of your screen and click on the **Registration** tab.

10) On the **Allow Registrants** screen – indicate which kinds of members (based on the Member Types in the system) can register for this particular Event. If you allow anyone and everyone to come, simply click “**Allow Everyone to Register for this Event**”.

11) Next click on the **Additional Info** tab at the top of the screen.

12) In the **Contact Information** section – you can enter the person who is in charge of Event questions for your organization to help registrants if they have any questions. Space is included for **Name, Phone #, Email** and any special **Custom Message** you may want to include with this detail.

13) **Confirmation Message** at the bottom of the **Additional Info** tab, provides you a place to add a Custom message that can appear on the confirmation email to the registrant – you can include a thank you message or what to bring with them when they attend the event.

14) Next go back up to the top of the screen and click on the **Event Page** tab. Here is where you can enter instructions or details to appear on the various screens during the registration process. In the Option Page and Confirmation Page – you can actually add information in the Header (top) and Footer (bottom) of the pages.

15) Next click on the **Options** tab. (Here is where you will enter all the items that have a fee related to them or details you need to know on each registrant attending the event such as registration, ticketed events, meal options, breakout workshops, etc.)

16) Click on **Add New Option**

17) Enter the details on this **New Option**:


- a. **Title** (required).
 - i. If you are just needing a count of registrations for a luncheon, for example, this could be titled “Luncheon Registration”.
 - ii. If you offer meal choices such as chicken and fish which you will need to know totals in advance of the meeting to coordinate with the caterer – then you can create one option for “Luncheon Registration – Chicken” and a second “Luncheon Registration – Fish”.
- b. **Show on Web Reg Form** – mark this “**Yes**” so that it can appear as an option on the web registration screen.

- c. **Description** – here you can enter specifics about this option.
- d. **Required Option** – Mark this “Yes” if everyone who comes to the event must be included in this option. It will be automatically added to their checkout and they cannot unselect it. Mark it “No” if you are giving them choices of options to pick from such as in the meal options mentioned above.
- e. **Quantity Box Style** – if you allow a person to purchase more than one ticket – then you should select **Text Box** here, otherwise if you want each person to register on their own so that you can know who all is coming to the event – then you would want to select “**Check Box**” here.
- f. **CE Units and Write the Option to Members History:** *(these items are in development)*
- g. **Time Conflict Code** - if you offer concurrent sessions and you want to be sure someone doesn't register for both – then you can assign a unique code to both of these concurrent session which the system can use to prevent registration in both sessions.
- h. **Dates and Times** (required) – This would be related to when this particular option actually occurs – most important on multi-day events. Remember, you must fill in both the Start and End Date/Time fields.
- i. **Pricing**
 - i. **Default Pricing** – if you offer the same price to everyone – enter it here. There is place to put the **Early Bird Price**, **Regular Price** and **Late Price** based on the Early Bird and Late Pricing dates discussed above in the overall Event Setup area. You must enter something in each of these fields.
 - ii. If you offer special rates to select types of members –
 1. First it is recommended to enter the highest registration rates for this Option in the **Default Pricing** fields
 2. Next click **Add Additional Member Pricing**
 3. Select the **Member Type** from the drop down and then enter the respective rates for them.
 4. Example – your monthly luncheon is \$40 (early, reg and late) for most everyone – but you offer a discount to Students who attend – they get it for \$20. Enter \$40 in Default Early, Regular and Late pricing and then add additional member pricing for Student with the \$20 (in early, regular and late fields respectively).

18) If you need to add another Option go back to the top of the screen and click on **Add New Option**

19) Once you have added all the information about this Event, click the **Save Changes** button in the lower part of the screen. Or click the **Cancel** button if you do not want to save any of this information.

20) When you are ready to take online registrations – remember to go back in to the Event and check that **Status is = “Active”** and check if you wish to have it appear on the Calendar.

21) The  will return you to the home page.

22) Click  to Logout of OHANA.