

Portal Prodigy[™]
Events Feature in Detail

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1.1 Introduction

Your members, employees, vendors, customers and community can review your event calendar, signup and pay – all online. Schedule educational programs and other types of events, enter details and import event brochures, registration forms, maps, etc from any computer into event records on the organization’s website in order to furnish visitors with an event calendar, program information and signup ability. Event details, contact information, registration limits, seating inventory, pricing and payment options can all be input, updated, tracked and reported. Visitors can register and pay online using credit cards or other payment options. Attendance lists and badges can be printed locally from any printer connected browser. Event notice email broadcasts may be scheduled in advance and sent automatically when appropriate. If desirable, a *view current registrants* link can be available to visitors.

Events feature benefits include:

- Easy enough for anyone to setup and run an unlimited number of conferences, seminars, trade shows, committee meetings, sporting events and educational events.
- Can automatically create and update event mini-browser on home page.
- Events descriptions and promotions are easily added to the system from a browser anywhere.
- Permits administration activation of “View Current Registrants” link so visitors can see who else signed up for event.
- Email broadcast or letter-merge event announcements.
- Visitors can view your entire event calendar, sign up and pay online.
- Automated “Sold-Out” can be set using event limits option.
- Control who can and cannot register for events.
- Multiple pricing and special services fees capability. For example, distinct member, non-member and guest fees. Also extras such as meals, parking, etc. can be included.
- Mapquest link provides automated map and directions.
- Prints badges
- Produce event registration detail and summary reports.
- Maintains detailed accounts receivables including complete billing and receipt history for the Event.

- Provides event related accounting reports or export to QuickBooks!

Some of the components, fields and settings of the Events feature, discussed in detail in this chapter, are:

Search for Events Page

Event ID Field
Title Field
Event Date Range Field
Created Date Range Field
Modified Date Range Field
Topics Field
Items Per Page Field

The Event Management

page input sections:

Event Detail
Event Location Details –
Make Checks Payable To
Details
Who to Contact for More
Information Details
Accepted Payment Methods
Details
Other Options

Registration Types and Fees

Record Details

Event Details

- Event Name Field
- Date & Time Field
- Description Field
- Registration Note
- Sponsor Name

Event Location Details

- Location
- Address 1
- Address 2
- City, State, Zip

Make Checks Payable To

Details

- Name Field
- Address 1 Field
- Address 2 Field
- City, State, Zip
Field
- Pay Online Radio
Button
- Pay By Mail Radio
Button
- Pay At Event Radio
Button
- Pay On Account
Radio Button

**Contact For More
Information Details**

Name

Phone & Extension

Email

Other Options Details

Days Prior to Event Date to

Cancel or Change Field

Event Limit Field

Require Entry of Registrant

Names Field

Send Response Notification

Email To Field

Reporting Class Field

**Registration Types & Fees
Detail**

Include Checkbox

Description Field

Cost Field –

Price Field

Item Update Icon Link

Record Details

- Created By Field
- Modified By Field
- Active Field
- Expires Date Field
- Chapter ID Field
- Topic Field
- Level Field
- Private Fields

Links

- View Event Orders Link
- View Event Registrants

Event Items Management Page

Feature Field

Features Record ID

Type

Item Name

Price

Cost

Default Item Radio Button –

Count as Registrant? Radio

Button

Restriction Rules Radio Buttons

- Anyone Can Register
- For Members Only
- Must be Member to
Register Others
- For Non-Members Only

User Limit

Item Limit

1.2 The Visitor Experience

1.2.1 Viewing Events

Visitors can be presented with links to events and events registration via side menu links, menu bar links and links from the mini browser. When activated, the mini browser displays a list of individual events on the home page.

The screenshot shows a website header with the text "NPO Demonstration Organ" and "Administer your organization fro". Below the header is a navigation bar with "Discussions" and "Documents" icons, and "Home" and "SignUp" links. A side menu on the left is divided into "Public" and "Members Only" sections. The "Public" section includes "Events", "News", and "Resources". The "Members Only" section includes "Directories", "Issue Press Release", "Search Biographies", "My Menu", "Discussions", "SignUp", "Login", and "Administration". A green arrow points to the "Events" link in the "Public" section. Below the side menu, there is a text block starting with "NNEMS (Nonprofitonly's Nonprofit Enterprise Sy" and "organization time and money while increasing it". Another green arrow points to the "Events" section of a mini browser, which lists three events: "Sep. 13 Legal Experts Panel for Art Retailers", "Sep. 26 Picasso's Blue Period", and "Oct. 20 Best Practice Integrated Marketing Communication". A "more" link is also visible.

Public

- ☀ Events
- ☀ News
- ☀ Resources

Members Only

- ☀ Directories
- ☀ Issue Press Release
- ☀ Search Biographies
- ☀ My Menu
- ☀ Discussions
- ☀ SignUp
- ☀ Login
- ☀ Administration

Discussions Documents

Home SignUp

NNEMS (Nonprofitonly's Nonprofit Enterprise Sy organization time and money while increasing it NNEMS provides a central facility which affords nonprofit organization the opportunity to particip practices and procedures. Using a simple Intern staff, constituents, advisors, members or contrit administrative and operational activities and the organization in real time. The list below introduc activities that can be conducted online, in real-ti anytime of the day, by anyone with the appropri

Events

- Sep. 13 [Legal Experts Panel for Art Retailers](#)
- Sep. 26 [Picasso's Blue Period](#)
- Oct. 20 [Best Practice Integrated Marketing Communication](#)

☀ [more](#)

Clicking on the Events menu link brings the visitor to the Events display where the visitor can click on an event label to access the Event Details page.

Events

Marketing Educational Events

09/13/2003 [Legal Experts Panel for Art Retailers](#)

Artists and Exhibitions

09/26/2003 [Picasso's Blue Period](#)

Marketing Educational Events

10/20/2003 [Best Practice Integrated Marketing Communication](#)

📅 Events Calendar

Clicking on the 📅 **Events Calendar** button accesses the event calendar.

The screenshot displays a calendar interface for September 2003. At the top, it says 'September 2003'. The calendar grid shows days of the week (Sun to Sat) and dates. A green arrow points to the 'Day' tab on the right. Two events are highlighted: 'Legal Experts Panel for Art Retailers' on September 13th at 6:00 pm and 'Picasso's Blue Period' on September 26th at 9:00 am. Below the main calendar are three smaller calendar thumbnails for August, September, and October 2003.

Clicking on the Day, Week or Month tab or clicking a date number link (ex. [18](#)) presents more details.

Thursday, Sep. 18, 2003

All Day	
8:00 am	
9:00 am	Appreciating Picasso
10:00 am	Rembrandt Remembered
11:00 am	Michael the Angel - Italian Spirit in Sculpture
12:00 pm	Keynote Speaker Luncheon
1:00 pm	
2:00 pm	Gothic Architecture
3:00 pm	Photo Realism
4:00 pm	Santa Fe's Up and Comers
5:00 pm	
6:00 pm	

Go To September 2003

August 2003						
S	M	T	W	T	F	S
				1	2	
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

September 2003						
S	M	T	W	T	F	S
		1	2	3	4	5
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

October 2003						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Clicking on an Event title presents the visitor with the Events Detail page.

Event

Details

Best Practice Integrated Marketing Communications

Date:	10/20/2003
Time:	12:00 PM
Location:	Olde Mille Inn 225 Route 202 Basking Ridge, NJ 07920
Register	Register
Sponsor:	
Description:	<p>Building relationships with customers is your number one priority. Reaching them is your number one challenge. How can you best use the tools of integrated marketing communications to reach customers who more busy and diverse than ever before?</p> <p>Learn about the power of truly integrated campaigns, and the impact of e-marketing and branding programs.</p> <p>Click Brochure Button below for more details and faxable registration form</p>
Fees:	
Non-Member:	\$125.00
Guest:	\$79.00
Member:	\$49.00
For More Info Contact:	Jimmy Smitts • 908.555.9768 • jimmv@hillstreettx.com

[View Registrants](#)

[Brochure](#)
[Map & Directions](#)
[Calendar](#)
[Register](#)
[Print](#)

At the Event Details page, visitors can learn about the event, view registrants by clicking on the **View Registrants** button, open a detailed brochure in formats such as PDF or HTML by clicking on **Brochure**, get directions by clicking on **Map & Directions**, and register by clicking on **Register**.

The View Registrants page displays all those who've registered for the event. Of course, Administration can choose not to display registrants if privacy is required.

View Registrants

Limit To: Go

Page 1 of 1		Total matches:7	
Last Name	First Name	Company Name	Title
Gold	Mark	Newark Tribune	Business Editor
Jones	John	Art World	Owner
Smith	Sally	Art World	Sales Rep
Reuning	Stephen		
Malden	Carl	Art Is Us	CEO
Shmaltz	Maximilian	Maximum Art	Owner
Rembrandt	Sabrina	Rembrandt Only	Res Artist

Print Close

Unlimited page brochures can be created and imported by Administration in many different formats **including video!** This allows organizations to implement as sophisticated a program as digitally possible.

Sample PDF Portion

Monday October 20, 2003
NPO Demo Organization
 Presents
Best Practice Integrated Marketing Communications
 At the Olde Mill Inn 225 Route 202 Basking Ridge, NJ 07920 (908) 555-5555

Kathleen Donaldson and Michael McCluen (McCluen and McCluen)	Jason Bootlesmith (Grafeworld)	Eric R. Carson (Flying High)
<ul style="list-style-type: none"> Do all of your communications speak with one voice? How can integrated marketing communications expand the ways in which your customers come in contact with your brand? 	<ul style="list-style-type: none"> What role does CRM software play in marketing? What advertising medium is best for your company? How creative should your creative be? 	<ul style="list-style-type: none"> Build your brand's momentum Generate increased customer value. Strengthen customer-brand relationships

Sample Video Display



1.2.2 Registering for an Event

A visitor begins the registration process by clicking on the  **Register** button on the Event Details page.

Member:	\$49.00
For More Info Contact:	Jimmy Smitts • 908.555.9768 • jimmy@hillstreetbx.com

 [View Registrants](#)

 [Brochure](#)  [Map & Directions](#)  [Calendar](#)  [Register](#)  [Print](#)



If the visitor is logged in with a verified ID and password, the system initiates the event registration process. If the visitor is not logged in the system requests a login or signup.

To Register for an event, please log in the system. If you are a new user, fill in the Sign Up form.

Login Email Address:

Password:

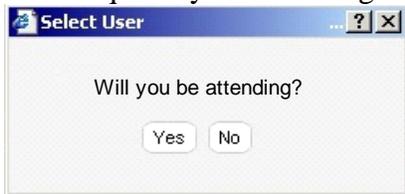
Remember password

 **Login**

first time users
Sign up here 

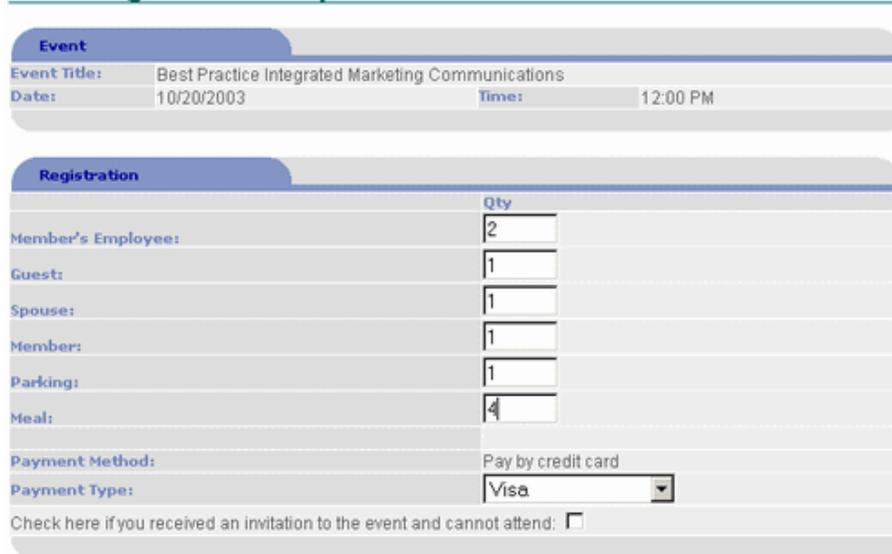
 [Forgot your login email address or password?](#)

Once logged in, the system asks the visitor if he/she is attending the event in order to determine the default quantity for those logins that are designated as a *Member Contact Type*.



Registration Page Step 1 presents the user with an interface to enter quantities of guests, meal and parking tickets etc. The visitor enters the quantities and clicks the **Next Step** button to move to Registration Step 2.

Event Registration - Step 1



The screenshot shows the "Event Registration - Step 1" form. It is divided into two main sections: "Event" and "Registration".

Event Section:

Event Title:	Best Practice Integrated Marketing Communications		
Date:	10/20/2003	Time:	12:00 PM

Registration Section:

	Qty
Member's Employee:	2
Guest:	1
Spouse:	1
Member:	1
Parking:	1
Meal:	4
Payment Method:	Pay by credit card
Payment Type:	Visa
Check here if you received an invitation to the event and cannot attend: <input type="checkbox"/>	

Close

Next Step

Event Registration Step 2 Page provides the visitor with an interface to enter names which will later be used to print badges and on reports.

Event Registration - Step 2 Registrant Information

Event Registrants					
Type	Salutation	First Name	Last Name	Company Name	Title
Member	Mrs.	Dana	Pallack		
Spouse	Mr. ▾	John	Pallack		
Guest	Mrs. ▾	Penelope	Brown		
Member's Employee	Mr. ▾	Arvin	Patel		
Member's Employee	Mr. ▾	Guillermo	Gonzalez		

➤ Close ➤ Previous ➤ Next Step

Based on the payment options enabled by Administration during setup, the visitor is presented with payment instructions including the option to enter credit card information and pay online.

Payment

Please, fill in your payment information

Payment Information	
Account number:	4155546889768765 Visa
Name on Card:	Dana Pallack
Expiration Month:	5 ▾
Expiration Year:	2006 ▾
Payment Date:	07/04/2003

➤ Previous ➤ Cancel ➤ Next

After payment information is entered, the visitor is presented with the Registration Approval page. To approve and submit the order the visitor clicks on the OK button.

Registration Approval

You have completed the event registration process. Please verify that all information on the order is correct. If everything is correct and you accept the Terms and Conditions press OK to confirm your registration. The system will then assign an Order# and display the finalized Order so you can print it. Note that once you press OK, your order is consider finalized and it cannot be changed.

Terms and Conditions

Event			
Event Title:	Best Practice Integrated Marketing Communications		
Event Location:	Olde Mille Inn 225 Route 202 Basking Ridge, NJ 07920		
Date:	10/20/2003	Time:	12:00 PM

Registration			
	Qty	Unit Price	Amount
Member's Employee	2	\$89.00	\$178.00
Guest	1	\$79.00	\$79.00
Spouse	1	\$79.00	\$79.00
Member	1	\$49.00	\$49.00
Parking	1	\$10.00	\$10.00
Meal	4	\$14.00	\$56.00
Total			\$451.00
07/04/2003	Payment - Visa		\$451.00

Registrants
Mrs. Dana Pallack
Mr. John Pallack
Mrs. Penelope Brown
Mr. Arvin Patel
Mr. Guillermo Gonzalez

[▶ Previous](#)
[▶ Cancel](#)
 [Print](#)
[▶ OK](#)

Administration may setup the events parameters to allow updates to event orders. In such a case, visitors can revisit their event registration and make changes.

Registrants

Mrs. Dana Pallack
Mr. John Pallack
Mrs. Penelope Brown
Mr. Arvin Patel
Mr. Guillermo Gonzalez

Select [Update](#) to edit your registration or [Delete](#) if you want to cancel it.

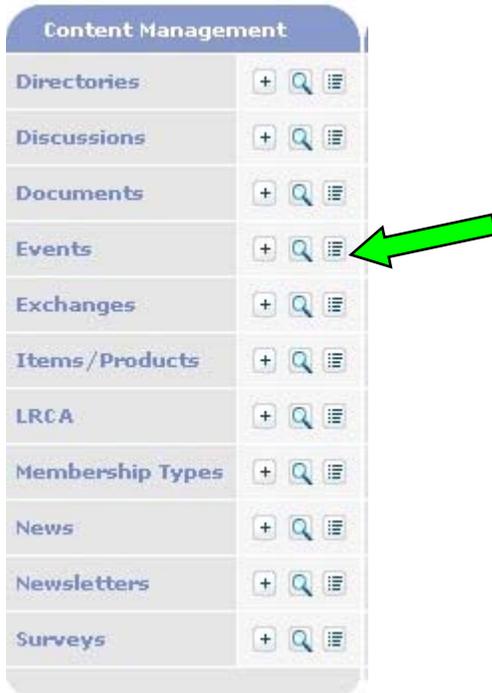
 Print  Close

Badges can be printed to a local printer on Avery Label stock or an equivalent.

Mark Gold Business Editor Newark Tribune	John Jones Owner Art World
Sally Smith Sales Rep Art World	Stephen Reuning
Carl Malden CEO Art Is Us	Maximilian Shmaltz Owner Maximum Art
Sabrina Rembrandt Res Artist Rembrandt Only	Bill Bailey Disc Jockey WRRO Radio

1.3 Components

The Events Management Page is reached by clicking on the appropriate icon in the Events row of the Content Management column of the Administration Menu.



Add Icon - Activates the Add a New Event function.



Browse Icon - Accesses the Search for Events function.

1.3.1 Search for Events Page

- **Event ID Field** - Each event is assigned a unique ID number in the database.
- **Title Field** - The title of the event is entered when the event is created. Permitted Administrators can create an event record.
- **Event Date Range Field** – The Event Date is entered by an Administrator when the event is created and represents the date when the event is scheduled to take place. By entering a date in the first Event Date Range field and entering a later date in the second Event Date Range field, one can search for Events with Scheduled to occur within the range
- **Created Date Range Field** – The Created Date Field is an autofill field. By entering a date in the first Created Date Range field and entering a later date in the second Created Date Range field, one can search for Events with Created Dates within the range
- **Modified Date Range Field** – The Last Modified Date Field is an autofill field. By entering a date in the first Last Modified Date Range field and entering a later date in the second Last Modified Date Range field, one can search for Discussions with Last Modified Dates within the range.
- **Topics Field** - The Topics Field contains a selection list based on entries made on the Event Topics Management pages. Topics determines which Event are grouped together on the public portion of the website..
- **Items Per Page Field** - The Items Per Page Field defines the total number of rows of matches that will be displayed in the results window. If the total number of matches exceeds the total defined number of rows then the visitor will need to click the page forward button  located at the top of the results window to see more of the matches.

 Executes a search for events matching the criteria entered. Clicking on  when no criteria is entered locates all event records.



If the Include deactivated records in search results is unchecked then deactivated records will be excluded.

Add New Accesses the Events Management page which is used to add a new event.

Clear Clears the search fields of data.

Print Prints the contents of the browser window using the printer connected to the visitor's computer.

Main Menu Returns the Site Administration Page.

The results of the Events Search are presented in a list on the Found Events page. If the total number of matches exceeds the total defined number of rows then the visitor will need to click the page forward button **Total matches:4** located at the top of the results window to see more of the matches. Clicking on an Event Title accesses that event's Event Management Page

Found Events

Page 1 of 1 Total matches:8

ID	Event Title	Event Date
4	Appreciating Picasso	09/18/2003
11	Best Practice Integrated Marketing Communications	10/20/2003
8	Gothic Architecture	09/18/2003
7	Keynote Speaker Luncheon	09/18/2003
6	Michael the Angel - Italian Spirit in Sculpture	09/18/2003
9	Photo Realism	09/18/2003
5	Rembrandt Remembered	09/18/2003
10	Santa Fe's Up and Comers	09/18/2003

Add New **Clear** **Print** **Main Menu**

1.3.2 Event Management Page

Event Management

Event	
Event Name:	Best Practice Integrated Marketing Communica ID: 11
Date & Time:	(mm/dd/yyyy) 10/20/2003 (hh:mm) 12:00 PM
Description:	Building relationships with customers is your number one priority. Reaching them is your number one challenge. How can you best use the tools of integrated marketing communications to reach customers who more busy and diverse than ever before?
Registration Note:	
Sponsor Name:	
Brochure:	

Event Location	
Location:	Olde Mille Inn
Address 1:	225 Route 202
Address 2:	
City, State, Zip:	Basking Ridge NJ 07920

Make Checks Payable To	
Name:	NPO Demonstration Organization
Address 1:	510 Horizon Ctr
Address 2:	
City, State, Zip:	Robbinsville NJ 08691

Who to Contact for More Information	
Name:	Jimmy Smitts
Phone:	908.555.9768 ext.
Email:	jimmy@hillstreetco.com

Accepted Payment Methods	
Pay Online:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Pay By Mail:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Pay At Event:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Pay On Account:	<input type="radio"/> Yes <input checked="" type="radio"/> No

Other Options	
Allowable # of Days Prior to Event Date to Cancel or Change to Registration:	7
Event Limit:	10
Require Entry of Registrant Names:	Yes
Send Response Notification Email To:	eventchair@npoder
Reporting Class:	Events

Registration Types & Fees			
Include	Description	Cost	Price
<input checked="" type="checkbox"/>	Member's Employee	\$0.00	\$89.00
<input checked="" type="checkbox"/>	Member	\$0.00	\$49.00
<input checked="" type="checkbox"/>	Spouse	\$0.00	\$79.00
<input checked="" type="checkbox"/>	Guest	\$0.00	\$79.00
<input checked="" type="checkbox"/>	Non-Member	\$0.00	\$125.00
<input checked="" type="checkbox"/>	Meal	\$0.00	\$14.00
<input checked="" type="checkbox"/>	Parking	\$0.00	\$10.00

Record	
Created By:	Stephen Reuning 07/02/2003
Modified By:	Stephen Reuning 07/04/2003
Active:	Yes
Expires Date:	
ChapterID:	1
Topic, Level:	None All Levels
Private:	No

[View Event Orders](#)

[View Event Registrants](#)

Process Fulfillment Save Delete Print Reports Broadcast Cancel Close

The Event Management page is divided into several input sections:

- **Event Detail** – Administrators enter the event description, title, and scheduling details into this section. Unlimited page brochures can be created and imported by Administration in many different formats **including video** using the import  Brochure feature. This allows organizations to implement as sophisticated a program presentation as digitally possible.
- **Event Location Details** – Administrators enter the events location into this section.
- **Make Checks Payable To Details** – Information input by Administrators into this section will be used to instruct visitor who request to pay by check.
- **Who to Contact for More Information Details** – Information input by Administrators into this section will be used to instruct visitors on who to contact for additional information
- **Accepted Payment Methods Details** – Selections made by the Administrator in this section will determine payment options presented to visitors when they register for an event.
- **Other Options** – Selections made by the Administrator in this section will determine registration options made available to visitors and initiate inventory controls.
- **Registration Types and Fees** – Provides Administrators with the ability to implement multiple pricing structures for single events, signup limits, price and cost reporting, and registration permissions.
- **Record Details** – Provides autofill information and input fields for database filter and security information.

Event Details

Event	
Event Name:	Best Practice Integrated Marketing Communica ID: 11
Date & Time:	(mm/dd/yyyy) 10/20/2003 (hh:mm) 12:00 PM
Description:	Building relationships with customers is your number one priority. Reaching them is your number one challenge. How can you best use the tools of integrated marketing communications to reach customers who more busy and diverse than ever before?
Registration Note:	
Sponsor Name:	
Brochure:	

- **Event Name Field** – The Administrator enters the name of the event in this field. It will be displayed to visitors viewing the Events List on the public portion of the website.
- **Date & Time Field** – The Administrator enters the date and time of the event in this field. It will be displayed to visitors viewing the Events List on the public portion of the website. It will also be used by the system to determine the event’s placement on the event calendar.
- **Description Field** – The Administrator enters the descriptive details of the event in this field. It will be displayed to visitors viewing the Events Details after they click on the corresponding Event Title in the Event List on the public portion of the website.
- **Registration Note** – The Administrator enters notes regarding registration for the event in this field. It will be displayed next to the registration link to visitors viewing the Events Details.
- **Sponsor Name:** - The Administrator enters the name(s) of any event sponsors for the event in this field. It will be displayed to visitors viewing the Events Details.

Event Location Details

Event Location		
Location:	<input type="text" value="Olde Mille Inn"/>	
Address 1:	<input type="text" value="225 Route 202"/>	
Address 2:	<input type="text"/>	
City, State, Zip:	<input type="text" value="Basking Ridge"/>	<input type="text" value="NJ"/> <input type="text" value="07920"/>

- **Location** – The Administrator enters the name of the event location for the event in this field (For example, Hilton Hotel at Paramus). It will be displayed to visitors viewing the Events Details.
- **Address 1** – The Administrator enters the street address of the event location for the event in this field. It will be displayed to visitors viewing the Events Details.
- **Address 2** – The Administrator enters the street address of the event location for the event in this field. It will be displayed to visitors viewing the Events Details.
- **City, State, Zip** – The Administrator enters the City, state and postal code of the event location for the event in this field. It will be displayed to visitors viewing the Events Details.

Make Checks Payable To Details

Make Checks Payable To			
Name:	NPO Demonstration Organization		
Address 1:	510 Horizon Ctr		
Address 2:			
City, State, Zip:	Robbinsville	NJ	08691

- **Name Field** – The Administrator enters the name (payee) that payment checks should be written to. It will be displayed to visitors viewing the Events Details.
- **Address 1 Field** – The Administrator enters the street address of the payee address for the event in this field. It will be displayed to visitors viewing the Events Details.
- **Address 2 Field** – The Administrator enters the street address of the payee address for the event in this field. It will be displayed to visitors viewing the Events Details.
- **City, State, Zip Field** – The Administrator enters the City, state and postal code of the payee address for the event in this field. It will be displayed to visitors viewing the Events Details.

Accepted Payment Methods			
Pay Online:	<input checked="" type="radio"/> Yes <input type="radio"/> No	Pay By Mail:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Pay At Event:	<input type="radio"/> Yes <input checked="" type="radio"/> No	Pay On Account:	<input type="radio"/> Yes <input checked="" type="radio"/> No

- **Pay Online Radio Button** – By selecting Yes or No, the Administrator indicates whether visitor registrants can pay online using their credit card.
- **Pay By Mail Radio Button** – By selecting Yes or No, the Administrator indicates whether visitor registrants can pay online using their credit card.
- **Pay At Event Radio Button** – By selecting Yes or No, the Administrator indicates whether visitor registrants can pay at the event.
- **Pay On Account Radio Button** – **FUTURE IMPLEMENTATION**

Who to Contact For More Information Details

Who to Contact for More Information	
Name:	<input type="text" value="Jimmy Smitts"/>
Phone:	<input type="text" value="908.555.9768"/> ext. <input type="text"/>
Email:	<input type="text" value="jimmy@hillstreetx.com"/>

- **Name** – If there is a personal contact available to visitors who need additional information, the Administrator enters his/her name here.
- **Phone & Extension** - If there is a personal contact available to visitors who need additional information, the Administrator enters his/her phone number here.
- **Email** – If there is a personal contact available to visitors who need additional information, the Administrator enters his/her email address here.

Other Options Details

Other Options	
Allowable # of Days Prior to Event Date to Cancel or Change to Registration:	<input type="text" value="7"/>
Event Limit:	<input type="text" value="10"/>
Require Entry of Registrant Names:	<input type="text" value="Yes"/>
Send Response Notification Email To:	<input type="text" value="eventchair@npoder"/>
Reporting Class:	<input type="text" value="Events"/>

- **Allowable # of Days Prior to Event Date to Cancel or Change to Registration Field** – Many organizations allow cancellations up to a specific number of days before an event is scheduled to occur. If the *Allow Customer to Edit Submitted Orders* radio button is selected as Yes on the Event Features Management page, the Administrator may wish to set a number into this field in order to prevent last minute cancellations and updates for the specific event.
- **Event Limit Field** – The Administrator enters the limit of attendees into this field. If total registrants exceeds this limit, new registrants will not be able to signup. Instead they will receive a message indicating the event is sold out
- **Require Entry of Registrant Names Field** – When selected as Yes, the system displays fields to enter attendee names.
- **Send Response Notification Email To Field** – If an email address is included in this field and a Broadcast Template and Recipients list was created using the Broadcast Feature and then selected in the Response Notification Template field of the Events Features

Management page then the email address entered here will receive a notice each time a new registration is entered.

- **Reporting Class Field** – This field is used as a filter for reports based on reporting classes usually set up by committee or chair responsibility (For example, events, communications, membership, etc.). Provided Reporting Classes were entered in the Reporting Classes Management page, a selection list will be available here.

Registration Types & Fees Detail

Registration Types & Fees				
Include	Description	Cost	Price	
<input checked="" type="checkbox"/>	Member's Employee	\$0.00	\$89.00	
<input checked="" type="checkbox"/>	Member	\$0.00	\$49.00	
<input checked="" type="checkbox"/>	Spouse	\$0.00	\$79.00	
<input checked="" type="checkbox"/>	Guest	\$0.00	\$79.00	
<input checked="" type="checkbox"/>	Non-Member	\$0.00	\$125.00	
<input checked="" type="checkbox"/>	Meal	\$0.00	\$14.00	
<input checked="" type="checkbox"/>	Parking	\$0.00	\$10.00	
				

The description fields of the Registration Types and Fees Detail are filled by default for the convenience of System Administrators. The defaults can be changed from the Items Management

page which is reached by clicking in the Item Update Icon Link  - Logic is used to determine whether certain items should be displayed to a logged in visitor. For example, a logged in visitor who had membership type status would see the Member Registration Type, the Guest Registration Type and the Member’s Employee Registration Type, if they were active, but would not see the Non-Member selection because it would not apply. Logic for each Registration Type can be changed by the Administrator on the Items Management page. Items can be added by clicking on the  below the checkboxes.

- **Include Checkbox** – The Administrator can check and uncheck the boxes by clicking on them. A checked box indicates active status, in which case a visitor will be able to signup for the checked item when registering for an event.
- **Description Field** – The Description Field displays a purchasable item at registration signup and can be updated to display registration types to visitors when they register for an event on the public portion of the website.
- **Cost Field** – This field is for **FUTURE IMPLEMENTATION**.
- **Price Field** – The Administrator enters the price of an event type in the Price Field.
- **Item Update Icon Link**  -

Record Details

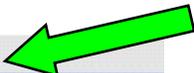
Record		
Created By:	Stephen Reuning	07/02/2003
Modified By:	Stephen Reuning	07/04/2003
Active:	Yes ▾	
Expires Date:	<input type="text"/>	
ChapterID:	1	
Topic, Level:	None ▾	All Levels ▾
Private:	No ▾	

- **Created By Field** – Indicates who entered the record
- **Modified By Field** - Indicates who last modified the record.
- **Active Field** – The Active Field can be set to Yes or No. When set to No, the event will no longer be displayed on the visitor (public) portion of the website. It also will be excluded from search results on administrative pages unless the Include deactivated records in search results box is checked. It does not delete the record but tags the record so it will be filtered

Search For Events

from display.

Search Criteria	
Event ID:	<input type="text"/>
Title:	<input type="text"/>
Include deactivated records in search results <input type="checkbox"/>	



- **Expires Date Field** – The Expires Date Field provide for the input of a date, after which the event will no longer be displayed on the visitor (public) portion of the website. It does not delete the record but tags the record so it will be filtered from display.
- **Chapter ID Field** – Indicates the chapter of the user who entered the event record. This field is applicable on multi-chapter versions of PORTALPRODIGY.
- **Topic Field** – The Topics Field contains a selection list based on entries made on the Events Topics Management pages. Topics determines which events are grouped together in the Events List on the public portion of the website.
- **Level Field** – The Level Field is applicable to multi-chapter synchronous installations of PORTALPRODIGY where levels, such as National, Regional, State and Local are used to filter the display of records.
- **Private Fields** – The Private Field can be set to *Yes* or *No*. Selecting *No* indicates that the event record may be displayed to all visitors. Selecting *YES* indicates that only visitors with

appropriate privileges may view the event record and causes the Security Groups selection box to be displayed at the bottom of the Events Management page. Clicking to check the corresponding check box(es) permits specified group members to view the discussion record on the public portion of the website.

Security Groups	
<input checked="" type="checkbox"/>	Admin
<input type="checkbox"/>	Employee
<input checked="" type="checkbox"/>	Members
<input type="checkbox"/>	Users
<input type="checkbox"/>	Visitors

Links

[View Event Orders](#)

[View Event Registrants](#)

- **View Event Orders Link-**

Event Registrants

Sort By: Registration Date Last Name

Items Per Page:

Page 1 of 1 Total matches: 4

Registrant Name	Registration Date	Member's Employee	Member	Spouse	Guest	Non-Member	Meal	Parking
Gold Mark	7/2/2003	0	1	0	2	0	0	0
Reuning Stephen	7/2/2003	0	1	0	3	0	0	0
Bailey Bill	7/2/2003	0	0	0	0	2	0	0
Pallack Dana	7/2/2003	2	1	1	3	0	0	0

Clicking on the View Event Orders link accesses the Event Registrant page which reports each individual registration order including the number of attendees by Registration Type.

- **View Event Registrants**

Clicking on the View Event Registrants link accesses the View Registrants page which lists all attendees registered for an event.

View Registrants

Limit To:  Go

Page 1 of 1			Total matches:16
Last Name	First Name	Company Name	Title
Gold	Mark	Newark Tribune	Business Editor
Jones	John	Art World	Owner
Smith	Sally	Art World	Sales Rep
Reuning	Stephen		
Malden	Carl	Art Is Us	CEO
Shmaltz	Maxmillian	Maxdum Art	Owner
Rembrandt	Sabrina	Rembrandt Only	Res Artist
Bailey	Bill	WRRO Radio	Disc Jockey
Bailey	Maria		
Pallack	Dana		
Catcatore	Carla	Artlovers.com	Rep
Bruha	Zelda	Artlovers.com	Rep
Corleone	Anthone		
Buyer	Major	Artlovers.com	Customer
Bruchmeyer	Hilda	Artlovers.com	Customer
Patel	Achmed	Artlovers.com	Customer

 Print  Close

Buttons



 Clicking on the Process Fulfillment button automatically fulfills all the event orders processing the purchase data to the general ledger and closing the ability to update the order and purchase record. If the *Post Orders* Radio button is selected on the Events Features Management setup page, orders will not post until the  button is clicked.

 Saves the data entered into the Event Record fields.

 Deletes the Event Record

 Prints the website page to the visitor's local printer.

 Accesses the Report Menu

Broadcast

Causes a notice to be broadcast based on the Broadcast Template and Recipients list created using the Broadcast Feature and then selected in the Auto Broadcast field of the Events Features Management page.

Cancel

Closes the page without saving or updating values.

Close

Closes the page and prompts the visitor to save the data.

1.3.3 Event Items Management Page

- **Feature Field** – This field automatically defaults to Events and cannot be changed.
- **Features Record ID** – This is an autofill field and indicates the ID number of the Event this item is linked to.
- **Type** – Defaults to the value *Item*. The other values such as *discount* or *adjustment* should only be selected if administration is seeking to track such items and wishes to make them part of the order.
- **Item Name** – This is a descriptive label that may be edited by the Administrator.
- **Price** – Administration enters the amount that visitors are to be billed for this item.

- **Cost – FUTURE IMPLEMENTATION**
- **Default Item Radio Button –**
- **Count as Registrant? Radio Button –** Selecting *Yes* indicates the item is to count as a registrant. Selecting *No* indicates the item is not to count as a registrant. Items such as parking, training materials, meals should have this button set to *No*. When an item is set to *Yes* and counted as a registrant it contributes to calculations which determine User Limits and Item Limits.
- **Restriction Rules Radio Buttons –** One Restriction Rules radio button can selected for each item.
 - **Anyone Can Register –** Allows any security level visitor to register for item.
 - **For Members Only –** Allows only users with *Member* Member Type assigned to their login (Contact Record).
 - **Must be Member to Register Others –** Allows only users with *Member* Member Type assigned to their login (Contact Record). This is used so members can, in addition to themselves, sign up multiple attendees such as spouse, employees and guests.
 - **For Non-Members Only –** Makes item available only to logins not assigned *Member* Member Type
- **User Limit –** Administrator sets this to limit the number of units of this item a single user can purchase or signup for.
- **Item Limit -** Administrator sets this to limit the number of units of this item that can be purchased.

1.4 Feature Administration

Implementing the Events Features involves the following steps:

- Create an Events Auto Broadcast Template
- Prepare a Response Notification Template
- Prepare a New Event Announcement Template
- Activate the Events Feature
- Add Link to Side Menu
- Add Events Mini Browser
- Create Topic Categories
- Setup Acceptable Online Payments
- Enter Events

1.5 Tutorials

The following tutorials describe how to create and manage events and associated activities.

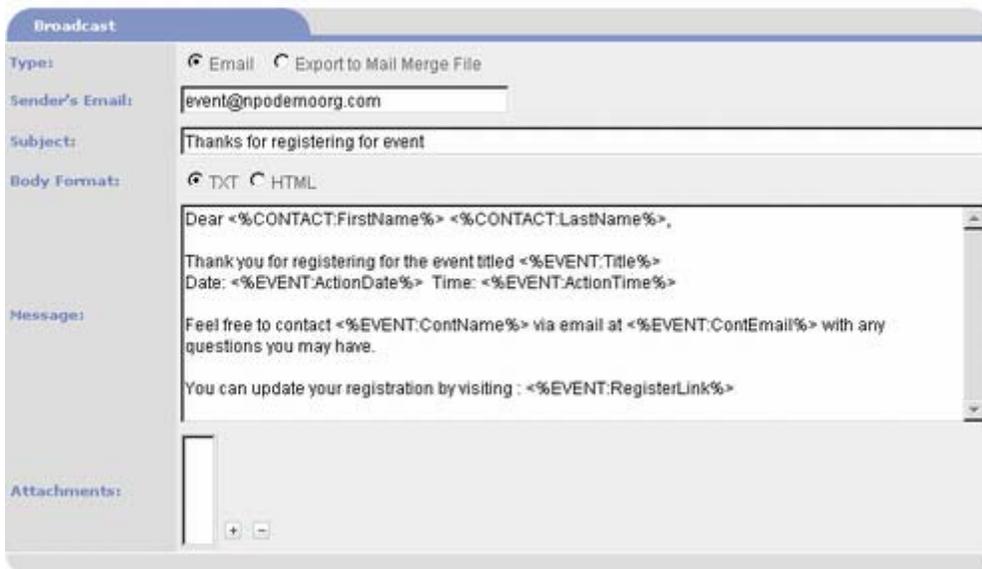
1.5.1 Preparing Auto Broadcast Template

Detailed instructions for using the Broadcasting Feature are located in the chapter titled *Broadcasting Features in Detail*.

The Auto Broadcast message is delivered when a visitor registers for a specified event if the feature is turned on in Event Features Management. Variable Data from the specific event is inserted into the template and delivered to the registrant for the purpose of confirming registration.

Sample Events Broadcast Template

Broadcasting



Broadcast

Type: Email Export to Mail Merge File

Sender's Email:

Subject:

Body Format: TXT HTML

Message:

Dear <%CONTACT.FirstName%> <%CONTACT.LastName%>,
 Thank you for registering for the event titled <%EVENT.Title%>
 Date: <%EVENT.ActionDate%> Time: <%EVENT.ActionTime%>
 Feel free to contact <%EVENT.ContName%> via email at <%EVENT.ContEmail%> with any
 questions you may have.
 You can update your registration by visiting : <%EVENT.RegisterLink%>

Attachments:

1.5.2 Preparing Response Notification Template

Detailed instructions for using the Broadcasting Feature are located in the chapter titled *Broadcasting Features in Detail*.

The Response Notification message is delivered when a visitor registers for a specified event if the feature is turned on for that event. Variable Data from the specific event is inserted into the template

and delivered to the recipient designated in the

Send Response Notification
Email To:

eventchair@npoder

field

Sample Response Notification Event.

The screenshot shows a web interface titled "Broadcasting" with a sub-header "Broadcast". On the left, there are labels for "Type:", "Sender's Email:", "Subject:", "Body Format:", "Message:", and "Attachments:". The "Type:" section has radio buttons for "Email" (selected) and "Export to Mail Merge File". The "Sender's Email:" field contains "events@npodemosite.com". The "Subject:" field contains "Another Event Signup". The "Body Format:" section has radio buttons for "TXT" (selected) and "HTML". The "Message:" field contains the text: "Attention Events Committee:
<%CONTACT.FirstName%> <%CONTACT.LastName%> has just signed up for the event titled <%EVENT.Title%>". The "Attachments:" field is empty with plus and minus icons.

1.5.3 New Event Announcement Template

Detailed instructions for using the Broadcasting Feature are located in the chapter titled *Broadcasting Features in Detail*.

The New Event Announcement message is delivered when an Administrator clicks on the

Broadcast

button on a specific event's Event Management page and then selects the template and the appropriate recipients. Variable Data from the specific event is inserted into the template and delivered to the recipient list for the purpose of announcing the event.

The screenshot shows a 'Broadcasting' interface with the following fields and content:

- Type:** Radio buttons for 'Email' (selected) and 'Export to Mail Merge File'.
- Sender's Email:** Text input field containing 'events@demosite.com'.
- Subject:** Text input field containing 'New Event Scheduled'.
- Body Format:** Radio buttons for 'TXT' (selected) and 'HTML'.
- Message:** A large text area containing the following text:

```
Hello <%CONTACT:FirstName%> <%CONTACT:LastName%>!  
  
We just wanted you to know that we've scheduled another event. It's titled <%EVENT:Title%> and will occur on <%EVENT:ActionDate%> at <%EVENT:ActionTime%>.  
  
Here's more: <%EVENT:Description%>  
  
Click here to register <%EVENT:RegisterLink%>  
  
Thank You|
```
- Attachments:** An empty text input field with '+' and '-' icons below it.

1.5.4 Activating the Events Feature

Click on the Features Management link in the Site Management column of the Administration Menu.



Click the box next to the Events label on the Features Management page to activate the Events Feature. Click on the [Events](#) link to access the Events Feature Management page.

Features Management

Features	
<input type="checkbox"/> Advertising	Companies
<input checked="" type="checkbox"/> Broadcasting	Help
<input checked="" type="checkbox"/> Discussions	GL Features
<input checked="" type="checkbox"/> Documents	Orders
<input checked="" type="checkbox"/> Donations	Payments
<input type="checkbox"/> Endorsements	Reporting Classes
<input checked="" type="checkbox"/> Events 	Menu Builder
<input checked="" type="checkbox"/> Exchanges	Mini Browsers Builder
<input type="checkbox"/> Experience	UserSignUp
<input checked="" type="checkbox"/> LRCA	
<input type="checkbox"/> Membership Fees	
<input checked="" type="checkbox"/> News	
<input type="checkbox"/> Notices	

Events Feature Management Page

Events Features Management

Options	
Post Orders:	<input type="radio"/> Immediately <input type="radio"/> Date Of Event <input checked="" type="radio"/> Manually
Allow Customer to Edit Submitted Orders:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Auto Broadcast:	<input type="text" value="None"/>
Response Notification Template:	<input type="text" value="None"/>

Select the appropriate Post Orders radio button.

- **Post Orders Immediately Radio Button** – Event registrations will be posted to the general ledger immediately and visitors nor administration will not be able to update or delete their orders. This is NOT a recommended setting.
- **Post Orders on the Date of Event Radio Button** – Event registrations will be posted to the general ledger on the day of the event and visitors nor administration will not be able to update or delete their orders after the date. This is NOT a recommended setting.
- **Post Orders on the Manually Radio Button** – Event registrations will be posted to the general ledger on the when administration clicks the button located on the Events Management page. This is the recommended setting.

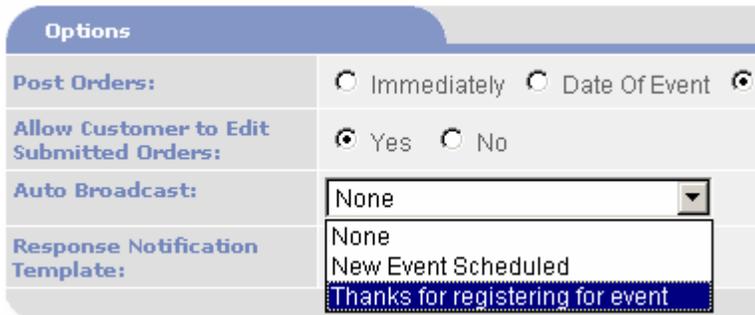
Select the appropriate Allow Customer to Edit Submitted Orders radio button.

- **YES Allow Customer to Edit Submitted Orders radio button** – Selecting Yes for this radio button allows visitors to update their registration order up until the date limited by the

setting in the  field of the specific Event's Event Management page.

- **NO Allow Customer to Edit Submitted Orders radio button** – Selecting No for this radio button prevents visitors from updating their registration order once it is submitted

Select an Auto Broadcast template

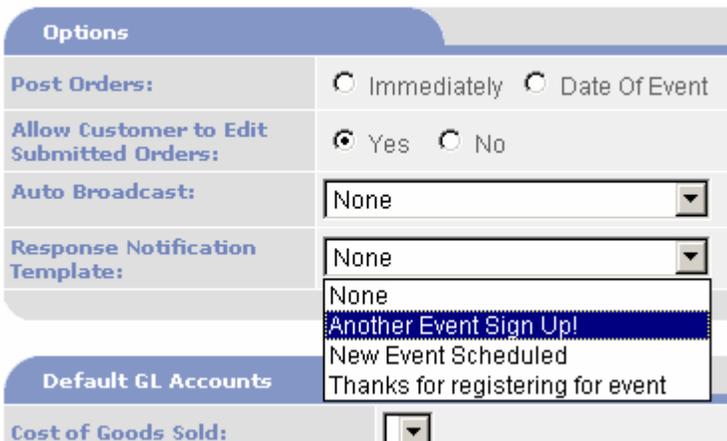


The screenshot shows the 'Options' section of a configuration page. It includes several settings: 'Post Orders' with radio buttons for 'Immediately', 'Date Of Event', and a third option; 'Allow Customer to Edit Submitted Orders' with radio buttons for 'Yes' (selected) and 'No'; 'Auto Broadcast' with a dropdown menu set to 'None'; and 'Response Notification Template' with a dropdown menu showing 'None', 'New Event Scheduled', and 'Thanks for registering for event' (highlighted).

The Auto Broadcast message is delivered when a visitor registers for a specified event if the feature is turned on in Event Features Management. Variable Data from the specific event is inserted into the template and delivered to the registrant for the purpose of confirming registration.

Select a Response Notification Template

The Response Notification message is delivered when a visitor registers for a specified event if the feature is turned on for that event. Variable Data from the specific event is inserted into the template and delivered to the recipient designated in the  field on the Event Management page for the specific event.



This screenshot shows the 'Options' section with additional settings. It includes 'Post Orders', 'Allow Customer to Edit Submitted Orders', 'Auto Broadcast', and 'Response Notification Template'. The 'Response Notification Template' dropdown is open, showing 'None', 'Another Event Sign Up!' (highlighted), 'New Event Scheduled', and 'Thanks for registering for event'. Below this is a 'Default GL Accounts' section and a 'Cost of Goods Sold' dropdown.

1.5.5 Adding Link to Side Menu

Click on the Features Management link in the Site Management column of the Administration Menu.



Click on the [Menu Builder](#) link located on the Features management page.



Click on the button on the Search for Menus page and click on the menu title for the menu you wish to add the events link.

Search for Menus

Search Criteria

Feature:

Created Date Range: to

Modified Date Range: to

Found Menus

Page 1 of 1 Total matches: 8

Menu	Type	Sub Type
MR_Left_Side	Standard Template Menu	Left Side Menu
MR_Right_Side	Standard Template Menu	Right Side Menu
MenuBarA	Standard Template Menu	Menu Bar A
MenuBarB	Standard Template Menu	Menu Bar B
QuickJump	Standard Template Menu	Quick Jump Menu
UserDropDownMenu	Standard Template Menu	Upper DropDown Menu
test_contact_menu	Contacts Menu	
exchange	Exchange Listings	

Click the Add Menu Item button on the Menu Builder page. And enter the desired values.

Options

Topic:

Menu Item:

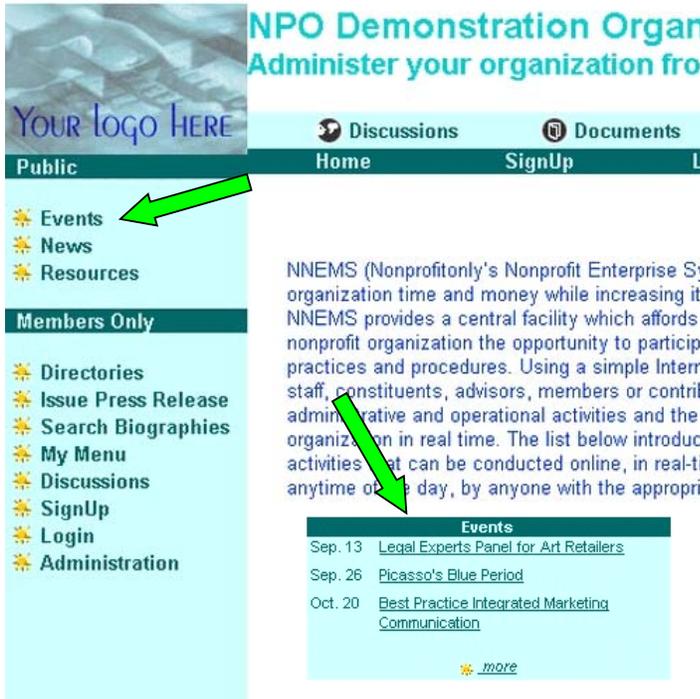
Sort Order:

Menu Item Option:

- URL
- Option
- Menu
- Administrative Option

See the chapter titled Menu Builder in Detail for more specifics regarding the setup of links on menus.

1.5.6 Adding Events Mini Browser



Visitors can click on the Events link in the side menu to access a list of events and Administration can command a Mini Browser to be built automatically on the home page so the list of events can be viewed there.



Click the **Include Events Mini Browser** radio button on the Greetings Management page (Accessed by clicking Greetings in the Content Management column of the Administration Menu) to *Yes*.



1.5.7 Creating Topic Categories

Topic categories should be used if the user organization schedules large numbers of events. The Topic categories can help organize the display of long lists of events based on areas of interest. Access the Topics Management page by clicking on the [Topics](#) link on the Event Features Management page.

Events Features Management

Options

Post Orders:	<input type="radio"/> Immediately <input type="radio"/> Date Of Event <input checked="" type="radio"/> Manually
Allow Customer to Edit Submitted Orders:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Auto Broadcast:	<input type="text" value="None"/>
Response Notification Template:	<input type="text" value="None"/>

[Topics](#) 

Add new topics by clicking on the [Add New Topic](#) link

Events Topics Management

[Artists and Exhibitions](#)
[Marketing Educational Events](#)
[Networking and Social Events](#)

[Add New Topic](#)

Topics can be selected when entering Events so that they organize for display.

Marketing Educational Events

09/13/2003 [Legal Experts Panel for Art Retailers](#)

Artists and Exhibitions

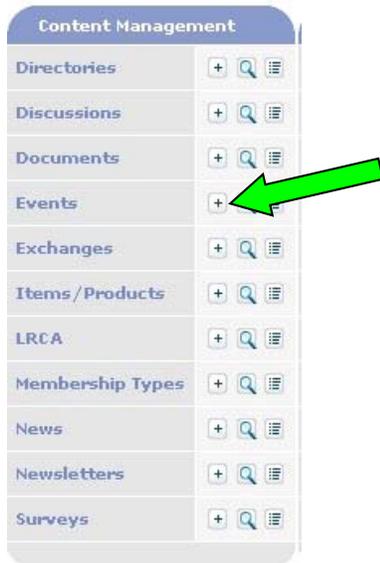
09/26/2003 [Picasso's Blue Period](#)

Marketing Educational Events

10/20/2003 [Best Practice Integrated Marketing Communications](#)

4 Events Calendar

1.5.8 Entering Events



Click on the  icon to access the Events Management page.

 **Add Icon** - Activates the Add a New Event function.

 **Browse Icon** - Accesses the Search for Events function.

Enter data into the page and save. See the section of this chapter titled *Components* for details.
