

How do I create an event in Event Planner?

Omar S. - 2023-11-28 - Events & Calendar

With the **Event Planner** feature, you can plan out and schedule events for your club. You can invite members and non-members to attend, arrange online payment, and much more. Events can be created by event chairs, club executives, and site administrators.

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Accessing the Events List

1. To access the **Event Planner** feature, you must go to your club homepage and log in. Then, click **Member Area** near the top right.
2. Along the top of the screen you will see several grey tabs. Click on the **Events** tab.
3. Click **Event Planner** on the blue menu bar.
4. You are now on the **Events** page. To start setting up your new event, click on the **Create a New Event** button on the right side of the screen.

Events

Create A New Event

All Upcoming Events

[View All Events](#)

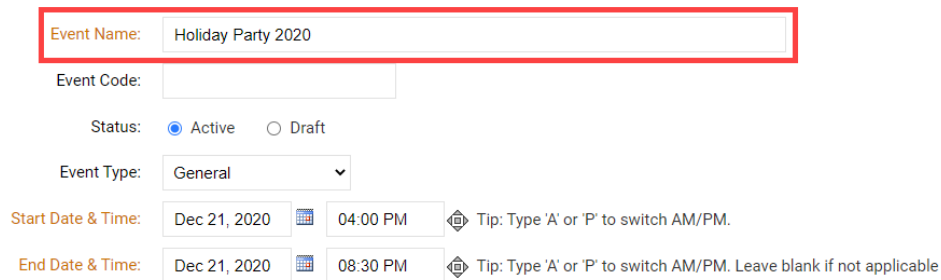
Event Date ▲	Event Name	Active	Location	Event Chair	Actions
Jun 30, 2021	Rotary Tree Planting	✓	2060 Winston Park Dr	Clare Davis	Open Delete Copy

Set the Event Details

1. You are now on the **Create New Event** screen, where you can write a description of your event and set up the time and place of the event. First, enter a name for your event in the **Event Name** field. You also have the option to set the **Status** of event as **Active** or as a **Draft**. An Active event will allow registrations if registrations have been configured. A Draft event will not allow registrations, even if registrations have been configured.

Create New Event

Create Event



Event Name:

Event Code:

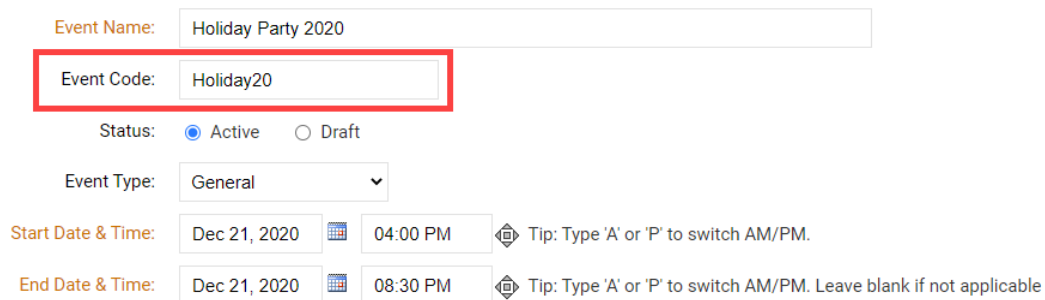
Status: ☒ Active ☐ Draft

Event Type:

Start Date & Time: Tip: Type 'A' or 'P' to switch AM/PM.

End Date & Time: Tip: Type 'A' or 'P' to switch AM/PM. Leave blank if not applicable

2. Now, if you wish you can enter a unique **Event Code**. This makes it much easier for you to track member payments for events from within your Sage or Bambora merchant account. You can assign your own Event Code when creating a new event, up to 10 characters long, or add one to an existing event by editing the event details. All payments transactions for that event will have the same code, appended by the unique registration ID, making it much easier to determine who has paid for what.



Event Name:

Event Code:

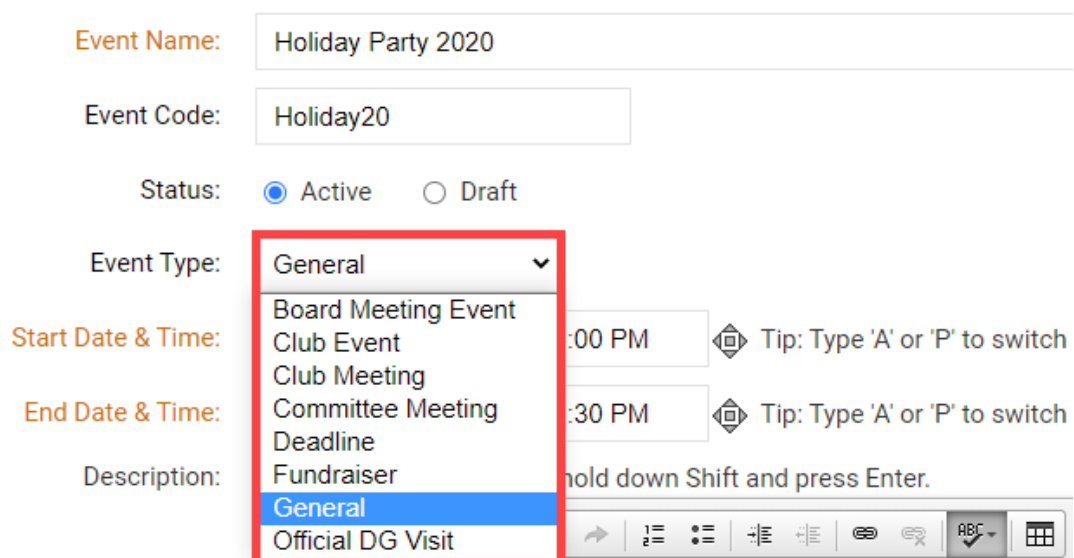
Status: ☒ Active ☐ Draft

Event Type:

Start Date & Time: Tip: Type 'A' or 'P' to switch AM/PM.

End Date & Time: Tip: Type 'A' or 'P' to switch AM/PM. Leave blank if not applicable

3. Next you can select the **Event Type**. The event type lets you pick which type of event you are creating.



Event Name:

Event Code:

Status: ☒ Active ☐ Draft

Event Type:

Start Date & Time: Tip: Type 'A' or 'P' to switch AM/PM.










End Date & Time: Tip: Type 'A' or 'P' to switch AM/PM. Leave blank if not applicable

Description:





Event Type Options:

- Board Meeting Event
- Club Event
- Club Meeting
- Committee Meeting
- Deadline
- Fundraiser
- General**
- Official DG Visit

The event's color on the calendar depends on which event type you select. See the different colors below:

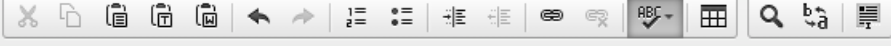
-  - Board Meeting Event
-  - Club Event
-  - Club Meeting
-  - Committee Meeting
-  - Deadline
-  - Fundraiser
-  - General
-  - Official DG Visit
-  - Speaker

4. Now, you may enter the date of the event. The **Start Date & Time** specifies the start date and time of the event. The **End Date & Time** field is where you set the end date and time. Click on the small calendar icon next to the date and time fields to use a pop up calendar to choose a day. The date fields must be filled in, but you may leave the time fields blank if so desired.

Event Name:	Holiday Party 2020		
Event Code:	Holiday20		
Status:	<input checked="" type="radio"/> Active <input type="radio"/> Draft		
Event Type:	<div style="border: 1px solid #ccc; padding: 2px; display: inline-block;">General ▼</div>		
Start Date & Time:	Dec 21, 2020 	04:00 PM 	Tip: Type 'A' or 'P' to switch AM/PM.
End Date & Time:	Dec 21, 2020 	08:30 PM 	Tip: Type 'A' or 'P' to switch AM/PM. Leave blank if not applicable

5. Once you have set the date and time details, you may enter a description of the event in the text edit field. You can use the buttons above the text field to edit the font size and style and insert special characters.

To add a single line break, hold down Shift and press Enter.







Normal ▼

Font ▼


Size ▼

B *I* U ~~S~~ x₂ x² I_x

A ▼

A ▼

 Source

Happy Holidays!

Join us in a celebration of the season on Dec. 20, at the Eugene V. Dubs Memorial Hall in Downtown Testerville. Family and friends are welcome to attend. At 8 PM, a spcial visitor will distribute small presents to children 12 and under.

body p

6. Once you have entered a description of the event, you may select an image to be associated with it. This image will appear on the event's information page. To add an image, click on **Choose File**. You can then select an appropriate image saved on your computer.

Image: ChristmasPresents1.jpeg

Event Chair:

Email:

Phone:

Location:

Address 1:

Address 2:

City:

Zip/Postal Code:

Country:

State:

Map Override: ☐ Inputting Latitude & Longitude will override the address on the map.

Latitude: ⓘ The GPS coordinates need to be entered in the Decimal Degrees format. See this [guide](#) for more assistance.

Longitude: ⓘ The GPS coordinates need to be entered in the Decimal Degrees format. See this [guide](#) for more assistance.

7. You may now select the **Event Chair**. The chair is the owner of the event. By default, the system will select the member that is creating the event, but you can change this as needed. Selecting a chair will automatically populate the email and phone number fields from the database. However, you can manually re-enter the email and phone number as needed.

Image: ChristmasPresents1.jpeg

Event Chair:

Email:

Phone:

Location:

Address 1:

Address 2:

City:

Zip/Postal Code:

Country:

State:

Map Override: Inputing Latitude & Longitude will override the address on the map.

Latitude: ⓘThe GPS coordinates need to be entered in the Decimal Degrees format. See this [guide](#) for more assistance.

Longitude: ⓘThe GPS coordinates need to be entered in the Decimal Degrees format. See this [guide](#) for more assistance.

8. You may now enter the address of the event in the provided fields. If the address information is complete, then the **View Map** link will pinpoint the location on the **Event Services** screen.

Image: ChristmasPresents1.jpeg

Event Chair:

Email:

Phone:

Location:

Address 1:

Address 2:

City:

Zip/Postal Code:

Country:

State:

Map Override: Inputing Latitude & Longitude will override the address on the map.

Latitude: ⓘThe GPS coordinates need to be entered in the Decimal Degrees format. See this [guide](#) for more assistance.

Longitude: ⓘThe GPS coordinates need to be entered in the Decimal Degrees format. See this [guide](#) for more assistance.

9. If required, you can override the default location that the Google maps pin will show on the event's page by entering in Google Maps Latitude and Longitude.

Image: ChristmasPresents1.jpeg

Event Chair:

Email:

Phone:

Location:

Address 1:

Address 2:

City:

Zip/Postal Code:

Country:

State:

Map Override: Inputing Latitude & Longitude will override the address on the map.

Latitude: ⓘThe GPS coordinates need to be entered in the Decimal Degrees format. See this [guide](#) for more assistance.

Longitude: ⓘThe GPS coordinates need to be entered in the Decimal Degrees format. See this [guide](#) for more assistance.

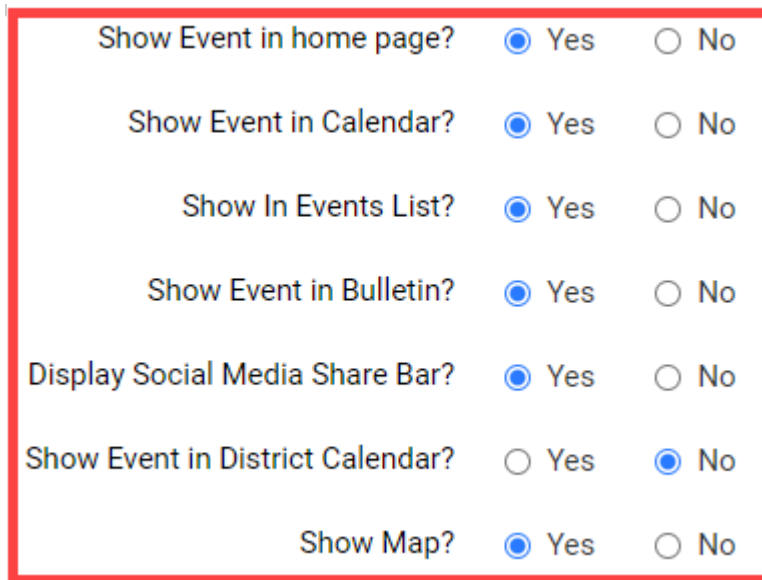
For help finding your Latitude and Longitude, please see our guide: [How to find a location's Latitude & Longitude in Google Maps](#).

10. Next, you can click on various fields that determine where the event will be displayed.

- **Show Event in home page:** This field gives the event chair the option to display the event on the homepage. Please note however, the event widget **must** be on the homepage for this option to display the event. Selecting **No** will hide the event from the home page.
- **Show Event in Calendar:** This field gives you the option to display the event on the mini calendar on the homepage and built-in Events Calendar page in the Calendar view. The mini calendar widget must be on the homepage for this option to display the event. Selecting **No** will hide the event from the mini calendar and from the built-in Events Calendar page in the Calendar view.
- **Show Event in Events List:** This field gives you the option to display the event on the built-in Events Calendar page in the List view. Selecting **No** will hide the event from the List view of the Events Calendar built-in page.
- **Display Social Media Share Bar:** This gives you the option to add a **share bar** wherever the event is displayed. With this toolbar, members can share details of the event through social media sites such as Facebook and Twitter.
- **Show Event in Bulletin:** Click **Yes** to display the event on your club's weekly

bulletin, provided you have included the events widget in the bulletin. Select **No** to hide the event from the Bulletin.

- **Show Event in District Calendar:** Click **Yes** to display the event on the district calendar. Select **No** to hide the event.
- **Show Map:** Click **Yes** to display the event's location in a Google Map, on the event's registration page. Select **No** to hide the embedded map from appearing on the event's registration page.

A screenshot of a form with seven rows of configuration options, each with a label and two radio buttons labeled 'Yes' and 'No'. The entire form is enclosed in a red rectangular border. The options are: 'Show Event in home page?' (Yes selected), 'Show Event in Calendar?' (Yes selected), 'Show In Events List?' (Yes selected), 'Show Event in Bulletin?' (Yes selected), 'Display Social Media Share Bar?' (Yes selected), 'Show Event in District Calendar?' (No selected), and 'Show Map?' (Yes selected).

Show Event in home page?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Show Event in Calendar?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Show In Events List?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Show Event in Bulletin?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Display Social Media Share Bar?	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Show Event in District Calendar?	<input type="radio"/> Yes	<input checked="" type="radio"/> No
Show Map?	<input checked="" type="radio"/> Yes	<input type="radio"/> No

11. Finally, click **Save** at the bottom of the screen. Or, if you wish to discard the event details, click **Cancel**.

A screenshot of two buttons, 'Cancel' and 'Save', side-by-side. The 'Cancel' button is blue with white text, and the 'Save' button is orange with white text. Both buttons are enclosed in a red rectangular border.

CancelSave

Event Services & Registration Options

1. Once you have saved the event, you are taken to the **Event Services** screen. Here, you can review and edit the details of your event, as well as set up registration, payment and invitation details. You can use the three buttons next to your event details to add or change aspects of the event.

- **Edit Details:** This link will take the event chair to the details of the event from where they will be able to edit the date and time, select a new event chair, etc.
- **Edit Links:** This link will allow the event chair to add links for the event. The added links will be displayed on the homepage event right under the image.
- **Edit Download Files:** This link will allow the event chair to add files that registering members may want/need before registering for an event. The added download files will be displayed on the homepage event right under the related links.

Holiday Party 2020

[Back to Events List](#)



Dec 21, 2020 at 04:00 PM - 08:30 PM

Event Type General
Event Code Holiday20
Event Chair [Edward Chu](#)
Location Eugene V. Debs Memorial Hall
135 Herbert St.
Green Town, WI 1234
United States of America



[View Map](#)

[Edit Details](#)

[Edit Links](#)

[Edit Download Files](#)

Event Description Happy Holidays!

Description

Join us in a celebration of the season on Dec. 20, at the Eugene V. Dubs Memorial Hall in Downtown Testerville. Family and friends are welcome to attend. At 8 PM, a special visitor will distribute small presents to children 12 and under.

Registration

You do not have registration enabled for this event.

If you would like enable event registration go to [Edit Registration Options](#)

2. In the next section of the page, you can set up the registration details for your event. Registration defines when members can sign up for the event. If no registration is setup then no one will be able to sign up. To configure your registration options, click on the **Edit Registration Options** button.

Registration

Registered for this event: 0 People

This is a MEMBER ONLY event

Registrations are enabled from Nov 16, 2020 to Dec 11, 2020

[Edit Registration Options](#)


Reports

[Registered Attendees \(Summary\)](#)
[Registered Attendees \(Detail\)](#)
[Alphabetical List of Attendees](#)

 [Download Attendees List](#)

 [Download Payment Report](#)

[Club Registration Status Report](#)

 [Prepare name tags](#)

Register

[View Registration Form](#)
[Register members](#)
[Register non-members](#)

3. You are now on the **Event Registration Options** page. Your first option is to decided whether or not registration should be opened as indicated by the **Open this event for registration box** highlighted below. This box is checked by default, indicating that registration is indeed open. To close registration for the time being, uncheck the box.

Event Registration Options

Open this event for registration: ☒

Date range to accept registrations:

Start Date & Time: Nov 16, 2020 07:50 AM Tip: Type 'A' or 'P' to switch AM/PM.

End Date & Time: Dec 11, 2020 04:00 PM Tip: Type 'A' or 'P' to switch AM/PM.

Is there a fee to attend this event? Yes (\$15.00 US Dollar)

Allow public registration? ☐

Allow members to register guests? ☒

Copy event chair on new registration emails? ☐

Enable comments on registration page? ☐

Enable Custom Email Message ☐

Custom Email Message:

Normal Font Size B I U S x x I

body p

Cancel Save

4. You may now enter the **Start Date & Time**, when registration for the event will open, and the **End Date & Time**, when registration closes. Members can no longer register online after the end date.

Event Registration Options

Open this event for registration: ☒

Date range to accept registrations:

Start Date & Time: Nov 16, 2020 07:50 AM Tip: Type 'A' or 'P' to switch AM/PM.

End Date & Time: Dec 11, 2020 04:00 PM Tip: Type 'A' or 'P' to switch AM/PM.

Is there a fee to attend this event? Yes (\$15.00 US Dollar)

Allow public registration? ☐

Allow members to register guests? ☒

Copy event chair on new registration emails? ☐

Enable comments on registration page? ☐

Enable Custom Email Message ☐

Custom Email Message:

Normal Font Size B I U S x x I

body p

Cancel Save

5. The next field, **Is there a fee to attend this event?** is for your own information. By default, an event is free. In this example, the event has a cost of \$15 USD. You can set up a fee (if desired) in the **Payment Settings** section of the page.

Open this event for registration: ☒

Date range to accept registrations:

Start Date & Time: Nov 16, 2020 07:50 AM Tip: Type 'A' or 'P' to switch AM/PM.

End Date & Time: Dec 11, 2020 04:00 PM Tip: Type 'A' or 'P' to switch AM/PM.

Is there a fee to attend this event? Yes (\$15.00 US Dollar)

Allow public registration? ☐

Allow members to register guests? ☒

Copy event chair on new registration emails? ☐

Enable comments on registration page? ☐

Enable Custom Email Message? ☐

Custom Email Message:

Normal Font Size B I U S x x I x

body p

Cancel Save

6. The four registration options below allow you to determine who can attend the event and how registrations are communicated to the chair.

- **Allow public registration:** If this option is checked then non-members will also be able to register for the event. If the option is not checked then only members of the club may register for the event.
- **Allow members to register guests?:** If you check this option, members will be able to register non-member guests.
- **Copy event chair on new registration emails?:** When this option is checked, the event chair is informed of new registrations as they come in, via email.
- **Enable comments on the registration page?:** If this option is checked, members and non-members may leave comments on the registration page when they register.

Event Registration Options

Open this event for registration: ☒

Date range to accept registrations:

Start Date & Time: Nov 16, 2020 07:50 AM Tip: Type 'A' or 'P' to switch AM/PM.

End Date & Time: Dec 11, 2020 04:00 PM Tip: Type 'A' or 'P' to switch AM/PM.

Is there a fee to attend this event? Yes (\$15.00 US Dollar)

Allow public registration? ☐

Allow members to register guests? ☒

Copy event chair on new registration emails? ☐

Enable comments on registration page? ☐

Enable Custom Email Message ☐

Custom Email Message:

Normal Font Size B I U S x x I

body p

Cancel Save

7. After setting the registration options, you have the option to set a custom confirmation email message for the registrants. To enter a custom confirmation email for the event, check the **Enable Custom Email Message** checkbox.

Event Registration Options

Open this event for registration: ☒

Date range to accept registrations:

Start Date & Time: Nov 16, 2020 07:50 AM Tip: Type 'A' or 'P' to switch AM/PM.

End Date & Time: Dec 11, 2020 04:00 PM Tip: Type 'A' or 'P' to switch AM/PM.

Is there a fee to attend this event? Yes (\$15.00 US Dollar)

Allow public registration? ☐

Allow members to register guests? ☒

Copy event chair on new registration emails? ☐

Enable comments on registration page? ☐

Enable Custom Email Message ☒

Custom Email Message:

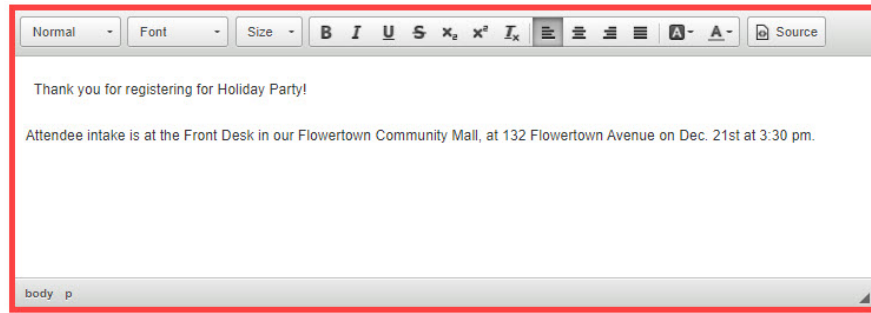
Normal Font Size B I U S x x I

body p

Cancel Save

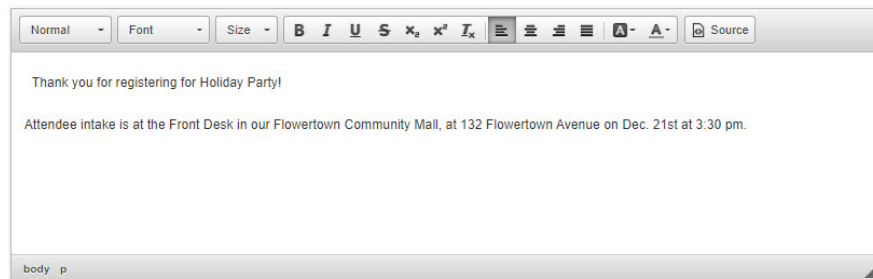
8. If you have checked the Enable Custom Email Message checkbox, enter the custom confirmation email for the event into the **Custom Email Message** text box.

Custom Email Message:



9. When you have completed editing the registration details and optional custom confirmation email, click **Save** to proceed. Or, to discard the information you have entered, click **Cancel**.

Custom Email Message:



Cancel Save

Update & Review Payment Settings

1. When you click **Save**, you are brought back to the **Event Services** page. Scroll down to the section marked Payment Settings. Here, you can set a fee for the event and manage payment details. By default, events are set to free. Click on the **Change Payment Settings** button to set a fee, or edit existing payment details.

Payment Settings

Event Fee: 15.00 USD
Currency: USD
Payment Method: No payment account specified
Pay to Register? No
Check Allowed? No

Change Payment Settings

2. Now, you may enter your event fee details, if any. First, enter the cost of the event into the **Event Fee** field. Then, click on the drop down box to select the appropriate currency for payment. Finally, if you have the Online Payment & eCommerce module set up for your club, you will see **Payment Method** as a selectable option. If you do not have this module, then you will only have the **No Payment Account Specified** option available only.

Note: To find out more about the **Online Payment & eCommerce** module, U.S. customers can click [here](#) and Canadian customers can click [here](#).

Event Payment Settings

Event Fee: 15.00

Currency: US Dollar

Payment Method:
☐ No payment account specified
☒ Sage Payment Solutions: Sage Test Payment Account (978985210861) - USD
☐ BeanStream Payment Solution: Bambora Test Merchant Account (300200484) - CAD

Require members to pay to complete registration? ☒ No ☐ Yes

Do you wish to allow payment by check? ☐ No ☒ Yes

Please make check/cheque payable to:
Send to:
Thank you for your prompt payment.

Cancel Save

3. The Require members to pay to complete registration option forces the member to pay by credit card first in order to register for the event.

Event Payment Settings

Event Fee: 15.00

Currency: US Dollar

Payment Method:
☐ No payment account specified
☒ Sage Payment Solutions: Sage Test Payment Account (978985210861) - USD
☐ BeanStream Payment Solution: Bambora Test Merchant Account (300200484) - CAD

Require members to pay to complete registration? ☒ No ☐ Yes

Do you wish to allow payment by check? ☐ No ☒ Yes

Please make check/cheque payable to:
Send to:
Thank you for your prompt payment.

Cancel Save

4. Your club also has the option accept payment by check. In the next window, you can enter check payment details. When you are finished setting payment options, click **Save** to finish, or **Cancel** if you wish to discard the information you have entered.

Event Payment Settings

Event Fee:

Currency:

Payment Method: ☐ No payment account specified
☒ Sage Payment Solutions: Sage Test Payment Account (978985210861) - USD
☐ BeanStream Payment Solution: Bambora Test Merchant Account (300200484) - CAD

Require members to pay to complete registration? ☒ No ☐ Yes

Do you wish to allow payment by check? ☐ No ☒ Yes

Please make check/cheque payable to:

Send to:

Thank you for your prompt payment.

Related Content

- [Widgets: Upcoming Club Events \(District Only\)](#)
- [VIDEO: Website Live Designer Widget Overview](#)
- [VIDEO: Events & Volunteer Management webinar with Michael C.](#)
- [Event Planner guide](#)
- [Event Planner overview and introduction](#)
- [How do I register other members?](#)
- [How do I register members from other clubs?](#)
- [How do I register non-members in Event Planner?](#)
- [How do I generate reports with Events Planner?](#)
- [How do I send event-related emails and invitation?](#)
- [How do I set up payment and credit card options for Event Planner?](#)
- [How do I set my club up with online credit card payments?](#)
- [How do I record payments for event registrations?](#)