Event Espresso – How to Create Event Listings

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The new PMC events calendar – Events Espresso – is similar to the system we were using previously, with the exception of the waitlist capability. There are a few tricks to setting up events in this new system and this note is to help you with that process.

Summary of Key Points

If in doubt about how to set up an event, please contact the Webmaster. If you are uncertain about how well you have set up an event, the Webmaster can review this before you make it live.

Not everything can be automated. Key things to make sure you do when setting up an event:

- Decide on the number of tickets ie participants. **The default is [now] set at 10.** You can change this to whatever you need for an event
- If is prudent to add a waiting list [6+ spaces] for any event that people register for through the website. This provides a way to automatically deal with cancellations
- If the event is one where you are going to review applications externally, you don't need to accept registrations so you do not need to display tickets…. but make sure you have a way for those interested to contact you outside of the events system
- If things go wrong participants can be added or removed manually from any event. There are some tricks to doing that and you may need to play with the trip and waitlist limits
- **Always leave the ticket price at $0.** We handle real payments [e.g. accommodation] outside of the registration process
- This system allows venues to be defined and selected from a drop down list. So if the venue list does not contain an appropriate entry for your event, consider creating a new venue description which can be saved for reuse
- Do not publish – make live – the event blindly. **Use preview** to see what your listing will look like **before publishing**
- Ask the webmaster for help if necessary.

1 How to Access the Events Expresso System

You need to be given access to the website. This means you need to be set up with the role of '**Events Administrator'** by the webmaster or someone else [Ex Com] with Administrator privileges.

If you are not able to see the prompt for accessing the Events Expresso system - explained below - then

1) Try logging in
2) If that does not work contact the webmaster asking for access

Once you have been given access, when you login to the website – *or return to the website after logging in previously* - you will see a series of links at the top of any PMC webpage you visit. **These do not appear for anyone who does not have access.**

You should see links labelled

• Potomac Appalachian Trail Club

• New

• Edit Page

• **Event Espresso** (with the coffee cup symbol)

Click on **Event Expresso** and then **Events** in the submenu. This brings you to the start page for creating and editing events.

To set up a new event, click on **Add New Event** at the top of the page.   Give it a title. Find the **Save Draft** button – top right – and click this. That way you've got a starting point saved.

Important. *You cannot be given access to the Events Expresso system without also giving you access to other parts of the website – specifically the bits concerned with creating and editing webpages. **You do not need to use any of that** so please do not go rummaging around the website once you are inside the system.*

Should you do this in a fit of misguided enthusiasm DO NOT SAVE or UPDATE anything if there is a problem. *Exiting the website without saving generally works if you've messed anything up....*

2 Publishing an Event

As with the previous system, you can create an event in draft. Once you have a draft event, you can test this out, including seeing how it looks and checking the registrations work, without making it visible on the website.

To do this just save the event as **DRAFT** when first created – and don't forget to hit **UPDATE** whenever you make any changes. Otherwise your changes will not be saved.

When you are ready to show this to the club select **PUBLISH** and the event will show up on the website Events page in chronological order.

3 Paid Events

Espresso Events is oriented towards paid tickets, which are generally not needed for PMC events. So the first instruction is....***do not create ticket listings with an actual price*** - this should always be left at $0.

Excom has agreed that for any paid events we set ticket prices at $0, but list the actual price in the event description, and invoice members externally.

If you create tickets with a non-zero price there are two implications

- Members cannot actually pay as we have not enabled a payment method
- Espresso Events does not think the transaction is complete and registrations can be overwritten by later applicants

4 Default Options

A number of defaults have been set up and will appear when you create a new event. It is recommended that you do not change these. They are mostly items in the event sidebar.

Save New Event

- **Draft**; use this when first creating an event
- **Update**; use this when making and saving changes
- **Publish**; use this to make the event visible on the website

Tags

- This is concerned with displaying subsets of events and can be left blank

Event Categories

- Predefined categories have been created. Try to use the existing categories
- If not suitable you can create a new category

Integration Settings

- Force Login for registrations? **Leave as YES**
- Auto Create users with registrations? **Leave as NO**

Event Registration Options

- Display Ticket Selector. **Leave as YES** [with an exception – see **Events by Selection** below]
- Maximum number of tickets allowed per order for this event. **Leave as '1'**
- Default Registration Status. **Leave as Approved**
- Other options can be left as blank

5 Event Details

The first paragraph in an event listing can be used to provide details of the event – date, type of event, location, other background info.

Venue Details

A number of predetermined descriptions have been prepared and can be including by selecting the appropriate location under '**Venue Details** '. If the venue information needs to be changed please edit the existing description. If your event is at a new location, please create a new venue so that this can be reused for other trips. Most venue descriptions include a hyperlink to google maps.

Example venues that have already been created

- Carderock
- Great Falls
- Elizabeth Furnace
- Old Rag
- Seneca Rocks
- etc

Event Tickets and Datetimes

This information is key to setting up an event. The first set of boxes should define the event duration in terms of day + hour for the start and finish, and the total number of tickets ie total allowed registrations for the event.

The second set of boxes defines the tickets/registrations. For most events, there will be only one ticket type so the number of tickets should equal the total number of people allowed on the trip. For events like the Daks Weekend, multiple tickets can be created and labelled as e.g. Room Titles by editing the first field in the second set of boxes.

Note that this field cannot be blank – there will be default text there if you do not provide your own title(s). If you have multiple ticket types, e.g. separate rooms, the sum of the total number of tickets/registrations across all ticket types should equal the total number of allowed participants for the event.

The date at which the tickets become available – and displayed in the Event Calendar on the website – can be any date and time between now and the start of the event. For many events this can be the current date and time. If you wish to delay signups then enter a future date here.

Discussion/Slug/Custom Fields

You can ignore these.

Event Waitlist

Wait List Spaces needs to be non-zero if you want a waitlist; suggested waitlist = 6.

If someone is promoted from the waitlist to the event because of a cancelation, then a waitlist space becomes available and this shows up on the website listing.

Auto Promote Registrants should be set to **YES.**

Manually Controlled Spaces should be left at zero.

Notifications
These are the user-defined email messages set out to anyone registering and anyone signing up for the waitlist. An email is also sent when someone is promoted from the waitlist. These notifications should be left as is.

6 Registrations

Registrations are usually created by members signing up for an event. You can also manually add registrations to an event and these count towards the total spaces for the event.

You can also manually delete or add registrations.

7 Events by Selection

For some events the Trip leader will want to vet applications and select participants. In this case you do not want tickets/registration options to be displayed.

There are two ways to list an event without allowing ticket selection/registration:

- Simplest approach is to alter the option in the right sidebar **Display Ticket Selector** to **NO**
- Alternatively, set the tickets on sale date to a future date and registration will not be displayed

8 Text to Include in Every Event

Every event description should list the trip leader and a means of contact. It should also include something like:

"Please cancel your registration if you are no longer able to attend so someone can have your spot. If you no show once, you will get an email from the Chair. If you no show twice, you will not be allowed to sign up for another event for 3 months. If you continue to no show, your membership will be cancelled and refunded."

"If you can't make it the morning of the event, at least give the trip leader a courtesy call so that no one is waiting for you in the parking lot."

"Please note that this is not a guided event and none of our trip leaders are professional guides. You will be climbing on ropes set up by members of the club who are hobby climbers and not professionals. Climbing is an inherently dangerous sport and you do so at your own risk. You are responsible for yourself and your own safety at all times."

You should also include this statement just above the registration button

"Please ensure you are logged in to the website BEFORE trying to sign up for an event."