FraternalEvents.com Owner's Manual

Last Updated Feb 23rd 2014

Disclaimer

*** This manual is subject to change without notice. Please continually communicate with your Accounts Manager to ensure you have access to the latest copy.

Table of Contents

Guest

As a Guest of this platform, you will have the ability to view events and register to become an account holder.

Welcome page

1- Brings the user to the **Login** page.
2- Brings the user to the **Account Creation** page.
3- Allows the user to search for an event by name, type or organization name.
4- Brings the user to the **Event Detail** page.
5- Brings the user to the **Event Detail** page.
6- Brings the user to the **Login** page.

DeMolay Congress jan 2014

Event Details | Attendee Info | Register | Back to event listing

Event Details:

DeMolay Atlantic Provinces presents...

DeMolay Congress jan 2014

Congress session

Where: Moncton, NB, Canada

Event Type: Public

When: Wednesday, January 01, 2014 at 01:00 PM EST

Ticket price: $10.00

Seat limit: 100 (**100** still available)

Available payment options: In Advance By Credit Card (PayPal), In Advance By Cheque, Cash At The Door, Bypassed: No-Charge, Cheque At The Door, Credit Card At The Door (PayPal)

Event schedule:

Thu, Jan 02 at **12:00 PM EST**	Saturday Lunch Burgers in Social Hall at the **Masonic Hall Moncton**	cost: included	
Thu, Jan 02 at **12:00 PM EST**	Saturday Lunch Vegan in Social Hall at the **Masonic Hall Moncton**	cost: included	
Thu, Jan 02 at **01:00 PM EST**	How to Recruit Members in Social Hall at the **Masonic Hall Moncton**	cost: included	25 seats available
Thu, Jan 02 at **01:00 PM EST**	How to Raise Funds in Lodge Room at the **Masonic Hall Moncton**	cost: included	50 seats available

1- Brings you to the **Event Details** page.
2- Brings the **Attendee Info** page once you've registered.
3- Brings you to the **Self-Registration** page.
4- Brings you back to the **Welcome** page.
5- Details the event purpose, type, cost, how many seats are left and what payment types are available.
6- Details the event's schedule.

Login page

1- Fields needed to login. Email address used to register and password (minimum of 10 characters).
2- Brings user to the **Forgot Password** page or **Account Creation** page.
3- Submits login form.

Forgot Password page

1- User inputs the email address used to register.
2- Brings user to the **Login** page.
3- Submits login form. If the email is found, the system will send the user an email with a special link that will send them to a **New Password** page that will also logged them in once they provide a new password.

Account Creation page (Self-Managed Account).

New user

Personal Details:

Title	
First name	* required
Middle name	
Last name	* required
Goes by	
Gender	○ Male ○ Female
Date of birth	
Spouse name	
Preferred shirt size	None provided yet
	Used if event provides a shirt
Your time zone	(GMT-11:00) American Samo
	Used when displaying transaction information
Mailing address	
	This address is used to send refunds
City or town you live in	Enter a location
Zip postal code	
Home phone	
Work phone	
Mobile phone	
Emergency contact name and phone number	
Health notes	
	This note is included in event attendee information
Other notes	

1 (arrow pointing to Middle name / name fields)

2 (arrow pointing to Your time zone)

Account:

Email address	* required
Password	Must be at least 10 characters
	* required
Password confirmation	* required

3 (arrow pointing to Password)

Organization Association Request(s):

What organization(s) would you like to request an association with? [What Organization(s)?]

Note 1: Requests will only be sent once you confirm your account.

Note 2: By requesting association to an organization, you hereby grant to the organization the privilege of communicating to you via email and grant them permission to include you in bulk emails, recognizing that you have the ability to unsubscribe from future event promotional messages at any time should I desire to do so in your user profile.

4 (arrow)

Is your organization not listed yet?

Would you like to add it?   Yes ○   No ●

5 (arrow)

Human Authentication:

EDWYR

CAPTCHA letters

Human Authentication: Please type what you see above

Don't see the CAPTCHA image and use IE?
Click on the 🔄 button at the top of your browser.

6 (arrow)

1- A public account must have at least a first and last name, email address and password.
2- Your time zone is necessary to use this system. Find yours and I will be set.
3- Enter a valid email and a password of your choice twice. Passwords must be alphanumeric and be at least 10 characters long.
4- Association Requests are used to request association as a member to any organization already in our system. Type the name of the organization and selected from the list of auto-populated choices. If it's not listed, it's not in the system yet. If you are allowed to be associated, you'll be notified by email.
5- If you are the first member of your organization to register, you can request that it be added.

Is your organization not listed yet?

Would you like to add it?   Yes ⦿   No ○

Organization Details:

Name	
Organization type	Freemasons

Don't see yours?

Suggest it: [ ]

Description	
Primary contact name and phone number	

Secondary contact name and phone number	
Civic address 1	
Civic address 2	
What city or town is it in	Enter a location
Mailing address line 1	
Mailing address line 2	
Mailing address location province or state and country	Enter a location
Mailing address postal or zip code	
Contact phone 1	
Contact phone 2	
Contact fax	

Once this information is entered and you create your account, your Accounts Manager will review this information and approved your organization.

6- In order to create an account, the system asks users to type what they see, to help make sure a human is registering and not a 'bot'.

Great News!
Your account is almost ready!

1

Please find a new email in your inbox and click on the *Account Activation Link* to continue. Be sure to check your spam/junk mail for accidental filing.

Didn't receive activation instructions?
Please resend them

2

Your account is almost ready Denis Daigle!

Please confirm and activate your account email through the link below:

1

Account Activation Link

1- User will find link in an email sent by FraternalEvents.com to confirm and activate their account which redirects users to the **Logged In** page log them in to be able to register for events they are eligible for.
2- Resends the confirmation email to the new user.

Event Attendee (Registered Member)

As a registered account holder, either as a member of one or more organizations, or simply a member of "Catch All", you now be able to register and buy tickets for events you are eligible to attend.

1- Brings the user back to the **Welcome** page.
2- Brings user to their **My Profile** page.
3- Ends the user session and brings the user back to the **Welcome** page.
4- Registration button disabled showing event registration is closed.
5- Registration button replaced by association request button. Event is for members of an organization type the user does not belong to. Clicking this button will send a request to the organization manager of hosting this event if the member can join their organization. Through off-line process, host organization will make appropriate contacts and proceed with association if eligible. Once user is associated and refreshes this page, the button will then say 'register'.

If you have already registered for the event and you have a registration complete or in progress, you will see that as a button to click.

6- Registration button allowed. User is eligible to register for this event. As a 'Catch-All' member, user is eligible for public events only. Clicking this button brings user to the **Activity Picker** page or to the **Registration review and payment** page if the event has no activities.
7- If registration is not yet open, user will be shown when registration will open in place of the registration button.

My Profile page

Manage My User Account

 Account Details   My Events

My Personal Details:

First name	Denis
Middle name	
Last name	Daigle
Goes by	Mr
Title	
Gender	● Male ○ Female
Event t-shirt size:	None provided yet
Spouse name	
Address	123 Memramcook East Road
Date of birth	
City or town you live in	Enter a location
Your time zone	(GMT-11:00) American Samoa

Needed when viewing transaction information

(current: Dec 06, 2013 at 08:30 AM SST)

Zip postal code	
Home phone	
Work phone	
Mobile phone	
Emergency contact name and phone number	
Health notes	
Other notes	

My Account:

Email address	fraternalevents@tmsginc.com
Password	(To change password, simply enter it below, if not, leave it blank)
	Must be at least 10 characters
Password confirmation	

Your Organization Association(s):

Catch all organization

Rank:

Role: **Event Attendee**

Group: **no group**

Member ID:

Member Card ID:

Receive informational and promotional emails for events from this organization: ☑

Pending Organization Association Request(s):

Requests that are waiting to be processed   • Southern Shriners

Request Organization Association:

What organization(s) would you like to request an association with?   [What Organization(s)?]

Find one by typing what you think it's name is above.

[Save Changes And Request Association(s)]

1- Brings you back to the **My Profile** page.
2- Brings you to your **My Events** page.
3- To set a new password, simply type it twice, just as during registration.
4- Any organization you are a member of will appear in this list. The settings such as role, group, member card and id items are only editable by the organization's Organization Manager (OM) or an Accounts Manager (AM) and are used to help you when you attend events.
5- Sets a flag that will allow event organizers to send 'extra' event messages and promotional messages targeting them as a past attendee.
6- Lists Association requests still pending approval.
7- To request association to an organization, start type its name and choose it from the list and click 'Save Changes And Request Association(s) button. Once you are approved or declined, you'll receive an email informing you of this change. If the organization does not appear in the list, either the name is misspelled or they are not in our system yet.
8- Any Health issues need to be listed here so event organizers get informed (allergies, etc).

My Events page

30 Oct 13   **WB Event 2013**

The registration for this event is not yet paid for or reserved and therefore your seat has not yet been reserved.

[Complete Registration] [Cancel Pending Registration]

[View Schedule]

Your schedule:

Wed, Oct 30 at 08:00 AM ADT : Morning Brainstorm until 12:00 PM, Main auditorium, Capitol Theater

Wed, Oct 30 at 12:00 PM ADT : Lunch until 01:00 PM, Conference Room, Capitol Theater

Wed, Oct 30 at 01:00 PM ADT : Afternoon Rap Up until 05:00 PM, Main auditorium, Capitol Theater

Wed, Oct 30 at 05:00 PM ADT : Supper until 06:00 PM, Conference Room, Capitol Theater

1- Details about the registration, if and when it was paid and information about its status.
2- If there registration is incomplete, this button will take you to the **Registration Review and Payment** page.
3- If the registration is incomplete this button will enable you to discard it.
4- This button show or hides your event schedule set based on your activity choices.

30 Oct 13   **WB Event 2013**

Purchase was no charge and processed on Oct 29, 2013 at 10:43 PM ADT

[View Schedule] [View Registration]

Your Invoice:

Purchase Review for Self Registration

Registration Attendee(s)

👤 Denis Daigle 2 (83075129265)   [View Schedule]

Registration Cost Summary

Event ticket	x	1	=	$0.00
Meals	x	2	=	$30.00
Meetings	x	2	=	included

Event and activities total costs: $30.00

Coupon applied: **None**

Taxes (0.0%): **$0.00**

Total Purchase Price: $30.00

Status: Bypassed: No-Charge (Bypassed: No-Charge)

Registration Notes (questions or special requests):

No notes provided

Note: changes by the attendees are only permitted if before the registration close date of Wed, Oct 30 at 04:56 PM ADT.

5- This button show/hides the registration invoice information.
6- This button show/hides your schedule based on activity choices made during registration.
7- Details showing registration financial amounts, coupon applied and payment status.
8- Details about the registration organizers should know about.

New Self Registration for DeMolay Congress jan 2014 event

Step 1: Please add your activities

1

☐	Thu, Jan 02 at **12:00 PM**	Saturday Lunch Burgers in Social Hall at the **Masonic Hall Moncton**	cost: included
☐	Thu, Jan 02 at **12:00 PM**	Saturday Lunch Vegan in Social Hall at the **Masonic Hall Moncton**	cost: included
☐	Thu, Jan 02 at **01:00 PM**	How to Recruit Members in Social Hall at the **Masonic Hall Moncton**	cost: included — 25 seats available
☐	Thu, Jan 02 at **01:00 PM**	How to Raise Funds in Lodge Room at the **Masonic Hall Moncton**	cost: included — 50 seats available **2**
☐	Thu, Jan 02 at **01:00 PM**	Floor Work to the next level in Board Room at the **Masonic Hall Moncton**	cost: included — 40 seats available
☐	Thu, Jan 02 at **05:00 PM**	Saturday Supper Chicken in Social Hall at the **Masonic Hall Moncton**	cost: included
☐	Thu, Jan 02 at **05:00 PM**	Saturday Supper Vegan in Social Hall at the **Masonic Hall Moncton**	cost: included

3 [Set And Review] [Cancel]

1- Choose activities by check activity boxes.
2- Information displays seats left in a given activity.
3- When you are done, either press "Cancel" to discard this registration or "Set and Review" to go to the **Registration Review and Payment** page.

Event Package Deals:

MORNING STRETCH	BOTH WORKSHOPS
Come to the morning workshop and eat with us and get over 30% off!	Go to both workshops and receive $10 off!
~~$16~~ $10	~~$0~~ $-11

5 [PRE-SELECT] [PRE-SELECT]

☑	☐ observe only	Sun, Nov 24 at **09:00 AM**	Morning Workshop in Lecture Hall A at the **MTA University**	cost: included
☑ **4**		Sun, Nov 24 at **12:00 PM**	Meal 1 in Campus Meal Hall at the **MTA University**	cost: $15.75
☐ **5**		Sun, Nov 24 at **12:00 PM**	Meal 1B in Campus Meal Hall at the **MTA University**	cost: $15.75
☐		Sun, Nov 24 at **12:00 PM**	Meal 1C in Campus Meal Hall at the **MTA University**	cost: $10.00 — 3 seats available
☐		Sun, Nov 24 at **01:00 PM**	Afternoon workshop competition in Lecture Hall A at the **MTA University**	cost: included
Sold Out **6**		Sun, Nov 24 at **04:00 PM**	Award Ceremony in Convocation Hall at the **MTA University**	cost: $-5.00 — No seats available

4- Some activities will have the option to let you be an observer only.
5- If the event organizer has create "package deals" you will be able to press a button labeled "PRE-SELECT" to pre-select activities and outline the activity types that need to be chosen to trigger a package deal. The next section shows how package deals are identified pre-payment.
6- If an activity has no seats available, it will not allow you to choose it.

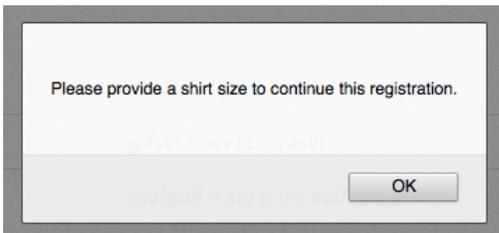*Choosing an event that starts at the same time will give you a warning:

You already have an activity starting at this time...

OK

**And if you are missing an activity that is part of a mandatory activity type, such as a meal, you will be provided with a warning:

Mandatory Activities Missing. In order to proceed with this registration, you must pick from following activity types: Saturday Lunch, Saturday Afternoon Session, Saturday Supper.

OK

***If event organizers are providing attendees with a shirt and you have not provided a preferred shirt size in your Account Profile, you will be prompted to provide one:

Extra Info Needed: Set your shirt size

My shirt size: Please select a shirt size   ***

Set And Review   Cancel

Please provide a shirt size to continue this registration.

OK

New Self Registration for DeMolay Congress jan 2014 event

Purchase Review for Self Registration
Registration Attend

1

👤 Denis Daigle 2 (34~~2~~5~~57~~~~9~~84)   [View Schedule]   ✏️ 🗑️

2

3

Registration Cost Summary

Event ticket	x	1	=	$10.00
Saturday Lunch	x	1	=	included
Saturday Afternoon Session	x	1	=	included
Saturday Supper	x	1	=	included

Event and activities total costs: $10.00

4   Coupon: [_____]   [Apply Coupon]

Taxes (0.0%): **$0.00**

Total Purchase Price: $10.00

Status: In Progress

Registration Notes (questions or special requests):

No notes provided	[update notes]

5

Note: changes by the attendees are only permitted if before the registration close date of Mon, Dec 30 at 01:52 PM EST.

Terms And Conditions

Late Fee
A late fee of $25 will be automatically added to the price of registration after January 20, 2014.

Refund Requests
No refunds will be granted after January 20, 2014.

☐ I have read and agree to the terms and conditions for this event.

6

[In Advance By Credit Card (PayPal)]   [In Advance By Cheque]   [Save For Later]   [Cancel]

7   **8**   **9**   **10**

1- This button show/hides your schedule information.
   *If the event organizers have created "package deals" and you pick the right activities to trigger a package deal, you will see this indicated by a small "gift" icon and the amount you'll save.

👤 Jim Smart (20524783570)   [View Schedule]   ✏️ 🗑️ 🎁 Package Deal Applied: -$10.75   *****

2- The edit (pencil) button brings you to the **Activity Picker** page.
3- The delete (trash can) button cancels the registration.

4- Entering a coupon code and pressing "Apply Coupon" will subtracts the value of the coupon from the total purchase price. The coupon must be valid, has not reached is limit and is prior to it's use before date set by the event organizer.

5- By clicking "update notes" you can provide organizers with special information they need to know to accommodate you at the event.

6- Some event organizers need Terms and Conditions agreed to before they can allow the purchase of event tickets.

7- The "In Advance By Credit Card (PayPal)" button will set PayPal as a payment method and forward you to the PayPal Website where you'll be able to pay for your registration using any method PayPal provides. Upon return, you registration will be set to "pending" while we wait for PayPal to inform us the payment was successfully made.

8- The "In Advance By Cheque" button will set this as a payment method and alert the organizers that you will send them a cheque by mail. Once they receive the cheque, they will add the cheque number and complete your purchase. Please note; not until the cheque is received will your registration seat be reserved.

9- The "Save For Later" button simply saves your changes so far. It does not reserve your seat however, and is meant to allow you to complete your registration at a later time.

10- The "Cancel" button permanently cancels your registration.

Once you successfully register, you will receive an email detailing your invoice information, your event ticket with schedule and an iCal file to add it to your calendar.

Invoice #R300-c070

Event: Calling all Masons
Purchased by: Mr John Eventman (method: Bypassed: No-Charge)
Purchased: Mon, Nov 25 at 02:07 PM SST

Members registered:
- Jones, Tom

Invoice items:

#	Item	Qty	Per Unit	Full Price
5	Event ticket(s)	1	$100.00	$100.00
1	Meals	1	$15.75	$15.75
2	Morning Speech Class	1		included
3	Awards Ceremony	1		included
4	Afternoon Speech Class	1		included

Total Price (before taxes and coupon): $100.00

Calling all Masons
Jones, Tom
Moncton, NB, Canada

46825262515

Check-in: Tue, Dec 24 at 08:00 AM SST
(Please print and bring this ticket with you
or have it available digitally for check-in.)

The barcode can be used by organizers to scan you into the event, and can be printed as proof of registration along with your invoice.

Jones, Tom
Calling all Masons Event Schedule
Start: Tue, Dec 24 at 08:00 AM SST
End: Tue, Dec 24 at 05:00 PM SST

Your Event Schedule:

Event	start time	end time	location
Morning Workshop	Sun, Nov 24 at 09:00 AM SST	until 12:00 PM SST	Lecture Hall A, MTA University
Meal 1	Sun. Nov 24 at 12:00	until 01:00 PM	Campus Meal Hall. MTA

Dec 24 Tue

Calling all Masons

When Tue Dec 24, 2013 4am
Where Moncton, NB, Canada

Add to calendar »

Attendee Info page

Event Details | Attendee Info

Communications From Organizers:

Thanks for coming

Sent On Oct 31, 2013 at 01:01 AM ADT

[View Message] **1**

From: Millett, Bill (Organization Manager)
Subject: Thanks for coming
Message:

It was great seeing all of you at the event.

Hope to see you next year.

BM.

We're looking forward to seeing you!

Sent On Oct 29, 2013 at 10:44 PM ADT

[View Message]

Documents For The Event:

Map of the area

This Map, provided by the town of Moncton, shows you great attractions as well as parking that you be able to take advantage of during your stay with us.

[View File] **2**

1- The "View Message" button shows or hides messages from the event organizers that attendees also receive by email (if they allowed it).

2- The "View File" button opens a new browser window to show you a file uploaded by event organizers.

Registration Modification functionality

Once a registration is purchased, you are able to make modifications that will either be of no cost to change, trigger a refund from the host organization, or require an additional payment to complete.

1- Clicking "Request Paid Registration Cancellation" will send the host organization a request. Once they acknowledge the request, they will send the registration owner a cheque for the owed amount.
2- Clicking on the registration modification button, the "pencil", for a specific registration attendee will bring you to the **Registration Modification** page.

3- By clicking on the "trash can" for a specific registration attendee, will create refund request for the attendee. If the registration only has one attendee, this action will "Request Paid Registration Cancellation".

Post Purchase Modifications

Once a change is made, clicking on the "Save Registration Changes" button will create a Post Purchase Modification (PPM). All PPMs are listed at the bottom of the registration form for review, committing or payment and recording keeping.

No cost PPMs

Post purchase modifications:

Registration changes created Dec 12, 2013 at 12:34 PM SST (Pending)   [View Change Items]
by Jim Smart

Change items:

−	Smart, Jim	from	Meal 1B	cost difference: - $15.75
+	Smart, Jim	to	Meal 1	cost difference: + $15.75

Total cost of changes   No Cost
(* This cost takes into consideration any package deals these changes add or remove).

[Commit] [Cancel]

If the changes made don't change the cost of the registration, you will be able to simply commit the change by clicking "Commit" to apply the modification. Clicking "Cancel" with discard it.

Refund PPMs

If the registration changes trigger a refund, once you are sure of your changes, click "commit And Request Refund" to commit your changes from your side.

Registration changes created Dec 12, 2013 at 12:43 PM SST (Pending)   [View Change Items]
by Jim Smart

Change items:

−	Smart, Jim	from	Meal 1B	cost difference: - $15.75
+	Smart, Jim	to	Meal 1C	cost difference: + $10.00

Total cost of changes $-5.75
(* This cost takes into consideration any package deals these changes add or remove).

[Commit And Request Refund] [Cancel]

Clicking "Commit And Request Refund" will send the organization staff and email informing them that you are waiting for a refund. Once your refund is acknowledged, you will receive and email informing you that a cheque is on its way.

Your refund request has been sent to the Host. Waiting for Host acknowledgement.

Once a refund has been issued, you will receive an email and see a new status message.

Refund Request Has Been Acknowledged
Notes: Your refund cheque has been sent.

Successfully committed Dec 13, 2013 at 07:10 AM SST by Mr John Eventman

Additional Cost PPM

If a change requires additional funds to be provided, you will have the option to pay by either PayPal or by cheque in advance.

"In Advance By Credit Card (PayPal)" functions as it does to pay for a registration as does "In Advance By Cheque". When choosing, to pay by cheque, the address is also provided.
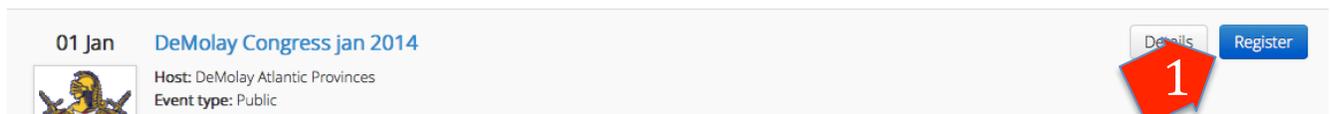

Once your cheque is received for payment, it will be processed and changes applied. This will send you a notice by email and change the on screen status.

Event Attendee Coordinator

As an Event Attendee Coordinator (EAC), seen as a Team Leader, you are part of an organization and part of a group. You can now register all members of your group for an event using **Group Registration** functionality as well as review Group Registrations using the **Organization Invoice Review** functionality. Additionally, you now have access to an Attendee List that you can use to track attendees from your organization(s) who are attending. Furthermore, as an EAC, you can add new users to your organization's group allowing them to bypass self-registration.

Group Registration functionality

Registration Choice page

1- As an EAC, clicking the "Register" button will bring you to a **Registration Choice** page.
2- Unless you are already registered, you'll be able to self-register as an Attendee. You'll now have access to do a group registration.

If you have already registered for this event, the self registration will be denied and give you a link to view your registration.

3- Both options now give you the option to specify for which organization you want to register on behalf of. Only organizations eligible to register for this event will be listed.
4- Clicking the "Start Registration" will bring you to the **Member Picker** page as a **Group Registration**.

New Group Registration for DeMolay Congress jan 2014 event

Step 1: Please choose the first attendee

Who from all groups of DeMolay Atlantic Provinces is this registration for?

| Please choose a member to register | Set And Choose Activities |

Please choose a member to register
Bill Millett (no group - Organization Manager)
Brian Noble (no group - Organization Manager)
Jamie Jones (Hants County Chapter - Event Attendee Coordinator)
John Birdsall (Phil Drader Coronation Chapter - Event Attendee)
Justin Jones (Phil Drader Coronation Chapter - Event Attendee Coordinator)

Cancel

1- When creating an Group Registration, start by choosing a member of your group (or all groups if you are a base group member).
2- Clicking on "Set And Choose Activities" will set this member as an attendee and allow you to choose their activities.
3- At any point, you can click "Cancel" to cancel this registration.

New Group Registration for DeMolay Congress jan 2014 event

List of attendees for this registration:

• Millett, Bill ✏ 🗑

Step 2: Add activities for Millett, Bill

☐	Thu, Jan 02 at **12:00 PM**	Saturday Lunch Burgers in Social Hall at the **Masonic Hall Moncton**	cost: included	
☐	Thu, Jan 02 at **12:00 PM**	Saturday Lunch Vegan in Social Hall at the **Masonic Hall Moncton**	cost: included	
☐	Thu, Jan 02 at **01:00 PM**	How to Recruit Members in Social Hall at the **Masonic Hall Moncton**	cost: included	25 seats available
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☐	Thu, Jan 02 at **05:00 PM**	Saturday Supper Vegan in Social Hall at the **Masonic Hall Moncton**	cost: included	

Set And Review   Save and Add Another   Cancel

1- Each Group Registration attendee is listed.
2- Each attendee can be edited (pencil) or removed (trash can).
3- You must choose this Attendee's activities.
4- By clicking "Set And Review" you will be taken to the **Registration Review and Payment** page.
5- Clicking "Save and Add Another" will repeat the process of choosing a member and picking their activities.
6- At anytime you can still click "Cancel" to cancel the registration.

* As with self-registration, if event organizers need shirt-size from each attendee, you will be asked to provide a shirt size if it is not in the attendee's profile information.

Edit Group Registration for Calling all Masons event

Purchase Review for Group Registration
Registration Attendee(s)

Jim Smart (20524783570) [View Schedule]   **1**   🗑   🎁 Package Deal Applied: -$10.75   **3**

2

Mr Rayne Man (54166074218) Allergic To Peanuts   [View Schedule] ✏ 🗑 🎁 Package Deal Applied: -$10.75

4

Team Activities Groupings
Teams of 2 for the Morning Workshop group activity:

Team :

Man, Rayne ▾
Smart, Jim ▾   **5**

*Changes are saved as they are made

1- Click on the "pencil" to go back to make activity changes for a given attendee.
2- Click on the "trash can" to remove this attendee from this registration.
3- Each Group Registration attendee is listed with the ability to edit or remove attendee. If activities chosen have triggered a package deal, it is listed as well.
4- Any Health notes detailed in the attendee's user profile will be listed here.
5- Activities that are marked as **Group Activities with Team** will ask the registration owner to specify which attendee should be placed on what team. This will be used at the event by organizers when activity is held.

Purchase Review for Self Registration
Registration Attendee(s)

Denis Daigle (90192565324) [View Schedule]   **1**   Add Required Attachment: [Browse...] No file selected.   **2**   [upload]   **3**

1- After purchase, if event organizers require all attendees to provide a sign waiver or other documentation, each attendee will now show an upload option.
2- Clicking on "Browse..." allows you to find a PDF file (only PDF files can be uploaded here) and make it ready for upload.
3- Once the file selected and ready, clicking on "upload" will upload the file for event organizers to access.

Denis Daigle (90192565324) [View Schedule]   **4**   [View Required Attendee Document] 🗑   **5**

4- The document attached, clicking on "View Required Attendee Document" open a new page in your browser and let's you see the uploaded document.
5- Clicking on the delete (trash can) icon will delete the uploaded file and allow you to upload another file.

Organization Invoice Review functionality

As an EAC, when you login, you will notice new options available to you.

1- The "Management Menu" item is clickable to show you a sub menu of areas you can now use to manage events and organizations you are an EAC for.
2- "Manage My Event(s)" will take you to the **My Events List** page.
3- "Manage My Organization(s)" will take you to the **Organization Management** page for the organization(s) you can help manage.

Once a Group Registration purchased, as an EAC, you will go verify the invoice by clicking on "Manage My Organization(s)" which brings you to the **Organization Management** page.

Organization Management page

As an EAC you have the ability to manage invoices you create and users from your organization's group.
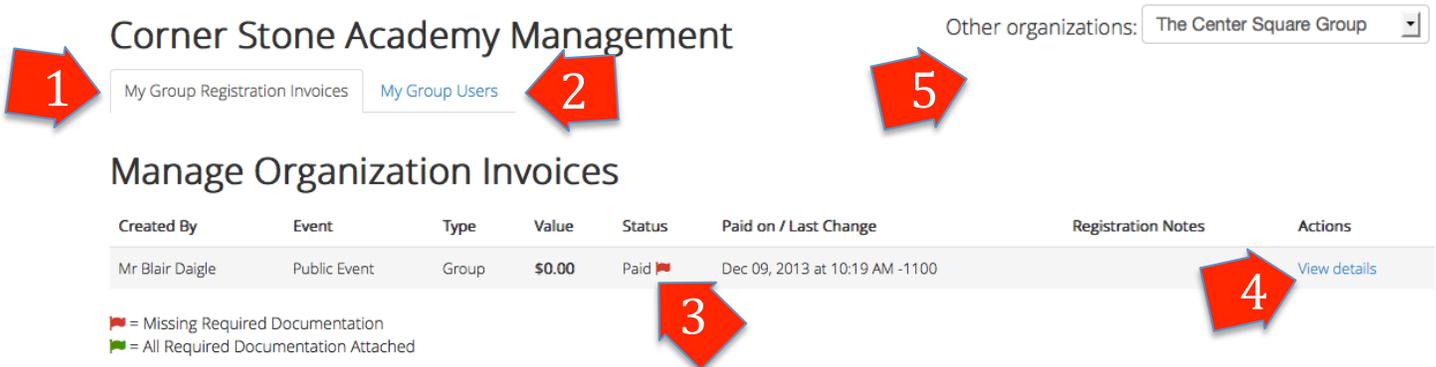
1- The "Management Menu" item is clickable to show you a sub menu of areas you can now use to manage events and organizations you are an EAC for. The "**My Group Registration Invoices**" tab gives access to all registration you are able to view.
2- "My Group Users" will take you to the **My Group Users** page of the organization you are viewing.
3- If the event organizers have required documentation, this feature indicates if at least one attendee on this registration is missing their documentation.
4- Clicking "view" details brings you to the **Registration Review and Payment** page as **Group Registration (post payment)** that you have seen when completing the registration.
5- If you belong to more than one organization, you'll have access to a drop down list that allows you to change the organization you are allowed to help manage.

My Group Users page

Corner Stone Academy Management

My Group Registration Invoices   My Group Users

Users from my group in Corner Stone Academy   [New User]

1 →   User Search

User	Role	Group	Actions
Mr Blair Daigle	Event Attendee Coordinator	blue	[Edit]
Tom Jones	Event Attendee	blue	[Edit]
Bruce Lee	Event Attendee	blue	[Edit]

1- This is a type and find feature to help you locate a user by name or email address.
2- The "New User" button brings you to the **Account Creation** page you have seen previously.

New functionality: Creating a **Group-Managed** account:

- The ability to **Bypass login info**, which will allow you to create an account without an email address and will be as a **group managed** user without the ability to login and self-manage. Group Managed accounts won't get any system-generated emails.

New user for Corner Stone Academy

Personal Details:

First name [   ]

Middle name [   ]

Last name [   ]

Goes by [   ]

Title [   ]

Gender   ○ Male   ○ Female

Account: ☐ Bypass login info *

Email address [   ]
This will be used to login

User Role within Corner Stone Academy

This new user will be set as an **Event Attendee** in your **(blue)** group.

Request Organization Association:

What organization(s) would you like to request an association with?   [What Organization(s)?]
Find one by typing what you think it's name is above.

- This can be changed to a **self-managed** account at anytime. Creating a self-managed account by including an email address will send the new user a welcome email with an initial password and allow them to login.
- Finally, you have the ability to add member ID and member card ID information

3- The "Edit" button brings you to the **My Profile** page you have previously seen but with the details of the particular user you have selected. Again, the difference is that you have the ability toggle between a group managed and self-managed account.

Organization Event Attendee functionality

As an EAC and higher, you will have access to the list of attendee's from your group. This list is located on the event's **Attendee Info** tab of any event your organization is attending.

Attendees from your organization(s):

As an **Event Attendee Coordinator** from **Corner Stone Academy**, here's a list of all attendees from the group **"blue"** who are attending: [Attendee List]

To access this tab, you can either (A) click on the event name on any invoice for the particular event:

Manage Organization Invoices

Created By	Event		Value	Status	Paid on / Last Change	Registration Notes	Actions
Mr Blair Daigle	Public Event	A	$0.00	Paid 🚩	Dec 09, 2013 at 10:19 AM -1100		View details

Or (B) click on "Manage My Events" from your navigation menu, find and choose the event you need the list for:

Events Management

Search [   ]   Filter: [filter events by... ▾] [🔍]

Your events:

Event	Actions
Public Event held by The Center Square Group on Tuesday, December 17, 2013 at 11:16 AM AST Organizational Members Attending	B [Attending Organization Access]
Calling all Masons held by The Center Square Group on Tuesday, December 24, 2013 at 08:00 AM SST Organizational Members Attending	[Attending Organization Access]

This will give you access to a list of Attendees from your group.

Public Event - Event Organization Attendee Report
Corner Stone Academy: blue
_____

blue group attendees:

#	Name	Checked-in?	Shirt size	Health notes	1	2
1	Smart, Jim (Event Attendee)	*NO*	Large		X	X
2	Taylor, James (Event Attendee)	*NO*	Medium		X	X

Activity Legend:
1 - gafsdf
2 - hsdfgsdf
_____

** As a reminder, on this same tab is communications from the event organizers and documents you can download for attendees.

Event Helper

As an Event Helper (EH) you are now have access to **Event Management** functionality to be able to help manage organization events by checking-in attendees and run all event reports, badges and lists. You also have the ability to **Receive A Registration Cheque Payment** for an event registration and **Acknowledge A PPM Refund** and process a **Receive PPM Check Payment** for changes to existing registrations. As an extension of **Organization Group Management** functionality, you will be able to manage other Event Helpers and below from your group.

Event Management Functionality

Receive A Registration Cheque Payment functionality

When a registration owner chooses to pay by "Cheque In Advance", the host organization must "receive the cheque" to complete the registration process and reserve the tickets. Although an automated email is always sent, it is recommended that hosts organizations pay attention to their mail boxes and registration listing.

By filtering by payment type "Waiting For Cheque To Be Received", you'll be able to see who has sent a cheque that you should be receiving by mail.

Any registration waiting for a cheque to be received, you will see (A) "Receive Cheque".

Clicking this button will show you the registration form you've seen previously, but now, on the bottom, will allow you to detail the cheque number for tracking purposes. Once added, clicking on the (B) "Receive Cheque" button will save the cheque tracking information, reserve the tickets, send the tickets, invoice and schedule information to the registration owner and set the new event capacity totals.

The registration will now show the payment status and cheque tracking information, as well as reflect this information in the registration reports.

Acknowledge A PPM Refund

Once a registration makes a change to an existing registration that triggers a refund, you will receive and email informing you that you must acknowledge this request and indicate that a refund has been sent.

Each registration requiring a refund is marked with "Refund Ack Needed!" and can be found by sorting registrations by the "Refund Ack Needed" filter option.

Once a refund is verified, acknowledge the refund by adding a short comment as a message that will be viewable to the awaiting registration owner, and click "Commit And Issue Refund".

At this time, all refunds are assumed as cheque's mailed to registration owners.

Receive PPM Check Payment

If a registration owner creates a change that requires additional funding, they will do so using the available funding methods. If they choose to pay by "Cheque In Advance", an email notification is then sent the host organization to process the payment when the cheque is received.

All registration PPMs requiring a cheque processed will be flagged with "Waiting fir cheque". To find all PPMs needing cheque processed, under the Event Registration tab, use the filter option called "Add-ons By Cheque In Waiting".

Once the cheque number has been added, clicking on "Receive Cheque" will commit the changes and notify the registration owner. A revised invoice and ticket(s) will be sent the registration owner.

As an EH you now have access to the **Attendee Check-in** page, **Event Registrations** page, **Event Activities** page and **Event Reports** page.

Attendee Check-in page

This Attendee Check-in page will likely be the most used area when an event is starting. This page gives you access to:

1- A quick view of how many attendees are checked in.
2- Find an attendee by listing their group, filter by checked-in or not or using the type and find using their name, attendee ID, email address, Member ID or Member Card ID.
3- Verify their required document by clicking the green flag, or contacting the registration owner if they flag is red, indicating they have not yet attached the document.
4- Check-in an attendee.
5- Check-out an attendee.
6- Add the room number.
7- Change the room number.
8- Print the attendee's schedule.
9- Show / Hide the attendee's schedule on the page for quick help if they show up at the registration booth during the event.
10- Print the attendee's badge for the event on the spot.

Event Registrations page

Similar to the **My Group Registration Invoices** seen as an EAC, the **Event Registration** tab give you access to view all registration invoices created for this event.

1- Filter the view by payment type, refund requested, not paid yet or cheque acknowledgement required.
2- Column headers a clickable to sort alphabetically.
3- Quick stats give you a running total for all registrations of this event.
4- Each registration attendee is shown with required documentation indicator and package deal triggered indicator.
5- Gain access to view the Post purchase registration view.
6- As indicated, an attendee's required document can be viewed by clicking on the green flag button once it's attached.

Event Activities gives you the ability to view who's is attending which activities, to print the attendance list for instructors, and, if the activity is a team event, see who is on what team.

1- Each activity shows where and when it is held and the seats remaining.

2- The "Attendance List" button toggles and on-page list of attendees and if they are participating and if they are checked-in to help with attendance records. If the activity is set to use **Placements**, the EH and higher will be able to set who places from first to 5th and who was a "no show".

3- The "Print" button brings up a PDF version of the list for printing and use during the activity.

Calling all Masons Event sold out   Back to event listing

Event Details   Attendee Info   Attendee Check-in   Event Registrations   **Event Activities**   Event Reports

Event Activities and Attendance Lists

3

Morning Workshop (Group Activity In Teams)   Attendance List   Print   Group Participants Teams List

Sun, Nov 24 at **09:00 AM SST**

Taking place in **Lecture Hall A** at the **MTA University**

Attendees for this activity: 10 -- No seat limits

Attendees:

Attendee	Checked-in?	Participating?
Daigle, Blair	no	Yes, will participate
Daigle, Antonio	no	Yes, will participate
Jones, Tom	no	Yes, will participate
Lee, Bruce	no	Yes, will participate

Calling all Masons
Morning Workshop (Group Activity)
Start Time: Sun, Nov 24 at 09:00 AM SST
(Taking place in the Lecture Hall A at the MTA University)

Attendance List

#	Attendee	Checked-in?	Will Participate?
1	Daigle, Denis The Man	no	Yes, will participate
2	Daigle, Blair	no	Yes, will participate
3	Jones, Tom	no	Yes, will participate
4	Lee, Bruce	no	Yes, will participate

4- The **Group Participants Teams List** button toggles the list of participants.

Event Activities and Attendance Lists

Morning Workshop (Group Activity In Teams)   Attendance List   Print   Group Participants Teams List   **4**

Sun, Nov 24 at **09:00 AM SST**

Taking place in **Lecture Hall A** at the **MTA University**

Attendees for this activity: 10 -- No seat limits

Group Participants:

Corner Stone Academy: blue

1. Mr Blair Daigle
2. Antonio Daigle
3. Tom Jones
4. Bruce Lee

Event Reports page

All Reports aim to present the on-page information as a printable PDF as well as a CSV for custom data manipulation.

Event Registrations Report
Contains all registrations of all status for this event. It includes attendee health notes as well as an "(!)" indicator if attendees of the registration are missing their required documentation.

Event Pending Registrations Report
Contains all pending registrations and the contact information for the registration owner so that event staff can help them complete and pay for the registration.

Event Attendees (by last name) / (by groups) Reports
Contains attendees sorted by name or group, including check-in, room number, health notes and activities attending to serve as an overview or master list. By group only shows attendees for a requested group.

Attendee Check-in Check-out Summary/Detail Reports
Serves as a tracking report to show either the first check-in and last check-out and by whom or the 5 last check-in check-out and by whom.

Print Attendee Badges (by last name or by group)
Creates a PDF ready to be printed using Avery standard <INSERT STANDARD HERE>. Badges contain attendee's name, ID, and schedule of activities that have been flagged as printable.

Event Activity Placements Report
Contains the placement information for each activity that has placements flagged.

Shirt Report
Contains the totals of shirt, by groups and total for the event for ease of preparation prior to an event.

Room Assignment Report
Contains a list, ordered by last name, of all attendees and their assigned rooms.

Room Occupants Report
Contains a list, order by room name, of all occupants within each room.

Event Manager

As an Event Manager (EM), in addition to all Event Helper functions, you are able to create and edit events, send communications to attendees, post event documents for attendees to download. Also, you can manage other Event Manager and below from your group.

Manage My Event(s) page

1- The "New Event" button will take you to the **New Event** page and use the **Create An Event** functionality.
2- The "Manage" button brings you to the **Event Management** page.
3- As an EM, you can easily duplicate an event by providing how far in the future the date and time should be, 0 for the exact same event date and time.
4- The "Edit" button brings you to the **Edit Event** page.

Creating An Event functionality

Creating an event is done in 4 phases. Event Details, Event Venues and Facilities, Event Activities and Event Package Deals. Each phase is needed in order to proceed to the next phase. At the end, you will review the event and make it visible for members to view and register if eligible.

New Event page (Step 1: Provide Event Details)

Provide the event a descriptive name, event host, and a clear description of the event. Any attendee communication automatically created by the system will be by the host organization you set.

Name	[ ]
Organized by	The Center Square Group ▾
Short event description	[ ]

The type of event you choose will be used to verify if a logged in user can register for the event. If are not (yet) associated with an organization that is part of the associations you detail, they will need to request association with one, or perhaps, yours.

What type of event is this?

- ○ Public
- ○ Host members only
- ◉ By organization type

Fraternal Organizations
- ☐ Freemasons - Blue Lodge
- ☐ Easter Star
- ☐ DeMolay
- ☐ Rainbow Girls
- ☐ Shriners
- ☐ Freemasons - York Rite
- ☐ Freemasons - Scottish Rite
- ☐ Jobs Daughters

Non-Fraternal Organizations
- ☐ Lions
- ☐ Rotary
- ☐ Kinsmen
- ☐ Food Bank
- ☐ Cancer Research Foundation

The registration seat limit will appear on the events details as well as be used to make sure no more attendees are added during a group registration.

Registration limited to: `0` (0 for unlimited)

As noted, the event start date is used on event tickets as well as preventing the ability to change a registration.

Event start date

Note: This date and time will appear as the check-in date and time on event tickets

Event end date

City or town held in `Enter a location`

The time zone set for the event will be what all reports and activities use for time indications regardless of what the user has set in their profile.

What time zone is the event in? `(GMT-11:00) American Samoa ▾`
Needed when displaying event and activity times

Event reminders are sent on behalf of the host organization's OM set in the **Organization Profile.** If using reminders, adding a reminder for more days then is left will send it on the same day it is created.

Would you like to send event reminders to attendees?   Yes ◉   No ○

When would you like to send a reminder?   Send a reminder `   ` days prior   **Remove**

Add a day to send an event reminder

If the event has a cost, you can also set the early bird price along with when the early bird pricing ends. This will be used to calculate correspondingly when updates are done.

Is this event free to attend?   Yes ○   No ◉

Price $`          `

Notify me on paid registrations   Yes ◉   No ○

Early price `          ` (make it the same as regular price to bypass early bird pricing)

Early bird price end date

When a registration owner completes the registration, or they have made changes to the registration that requires the registration owner to pay for additional fees, the payment types you set here will be available for them to choose from. Note that In Advance By PayPal and In Advance By Cheque are available to users, and all others are only available to staff.

Allowed payment types:

☐ In Advance By PayPal

☐ In Advance By Cheque

☐ Cash At The Door

☐ Bypassed: No-Charge

☐ Cheque At The Door

☐ Credit Card At The Door (PayPal)

If you wish to provide coupons for the event, you can add the special code, value as dollars or percentage subtracted from the base price as well as the restrictions that need to be applied to manage the usage of the coupon. Coupons will also be

Event Coupons:

Coupon code		[-] Remove
Description		
Use dollars ($) off instead of percentage (%) off?	Yes ⦿ No ○	
Coupon value	$ [____] off total purchase price (cannot be changed after use).	
Usage limit	[__] (0 for unlimited)	
Stop selling by	[_____] 📅	

The registration start and end date is used to toggle the registration button on the event list and details page.

Registration start date	[_____] 📅
Registration end date	[_____] 📅

The shirt option is what show or hides the shirt size question on registrations, available reports and extra shirt size columns on attendee reports.

If event shirts are provided, do you want to make shirt size information required?   Yes ⦿ No ○

The Attendee Room Occupancy setting is what show or hides the room detail on the check-in screen, room reports and room column on screens and attendee reports.

Will attendees have assigned rooms?   Yes ● No ○

The Attendee Required Documentation setting is what triggers the added PDF upload field on the registration page and on the screens and reports detailing registration information. If using reminders, adding a reminder for more days then is left will send it on the same day it is created.

Will attendees need to provide required documentation to attend?   Yes ● No ○

Would you like to send reminders to those who haven't uploaded a required document yet?   Yes ● No ○

When would you like to send a reminder?   Send a reminder [ ] days prior   Remove
Add a day to send a reminder

When someone registers for an event, an email is sent along with the invoice details and the event tickets and schedule. This custom paragraph will be added to this email.

Would you like to add a custom paragraph to the welcome/invoice email?   Yes ● No ○

Host message: [   ]

You can require the person registering to agree to terms and conditions by answering yes and filling the Terms and Conditions that will appear on the registration form.

Would you like to use terms and conditions for this event?   Yes ● No ○

Please detail your terms and conditions here: **Bold**   *Italic*   <u>Underline</u>   ➦

Late Fee
A late fee of $25 will be automatically added to the price of registration after January 20, 2014.

Refund Requests
No refunds will be granted after January 20, 2014.

Advisor Approval Required
An advisor from the registrant's Chapter must attend the event to supervise this registrant, if the registrant is an active DeMolay or another

Clicking on "Create Event" will save all of the event details and advance you to the next phase of the event creation: **Venue(s) and Facilities**.

Create Event   Cancel

New Event page (Step 2: Venues and Facilities)

A Venue must be created before facilities, within the venue can be added. The venues and facilities added here will appear on schedules, reports and as options when creating activities.

You can return to the event details by clicking on "Edit event details and coupons" or click "Save And Continue" to move to save the venues and facilities added and move to the next phase, **Activities**.

New Event page (Step 3: Provide Event Details)

An **activity** is always part of an **activity type**. An activity, set as mandatory, will force a registration owner to pick at least one activity from an activity type. If you wish to make every activity mandatory, you should place them all in their own activity type.

Setting an activity as a "Group Activity" will make the "As Observer Only" check box appear on activities as well as change the attendance list to reflect if attendee is participating or observing only. Adding teams will allow registration owners to set group team members and give you access to team attendance on screen and printed report.

Choosing to use placements for activities will enable you to set placements for each activity on the Activities tab in **Event Management** page.

Clicking on "Edit venues and facilities" will return you to the previous phase or clicking on "Save And Continue" will save all activity types and activities and advance you to the next phase, **Event Package Deals**.

Package deals give event organizers the ability to create "one-click select" groups of activities that show registration owners what activities can be selected together to trigger a package deal. Or, if a registration owner selects the right set of activities, a package deal will be applied.

Calling all Masons

Step 4: Package Deals

Event Package Deals:

Title	morning stretch [-] Remove
Deal code	mstretch
Description	Come to the morning workshop and eat with us and get over 30% off!

Deal Activities

Note: Selecting activities from the same activity type will make them "OR" instead of "AND" when calculating value.

☑ Sun, Nov 24 at **09:00 AM**	**Morning Workshop** (Morning Speech Class) in **Lecture Hall A** at the **MTA University**	cost: **included**
☑ Sun, Nov 24 at **12:00 PM**	**Meal 1** (Meals) in **Campus Meal Hall** at the **MTA University**	cost: **$15.75**
☑ Sun, Nov 24 at **12:00 PM**	**Meal 1B** (Meals) in **Campus Meal Hall** at the **MTA University**	cost: **$15.75**
☑ Sun, Nov 24 at **12:00 PM**	**Meal 1C** (Meals) in **Campus Meal Hall** at the **MTA University**	cost: **$10.00**
☐ Sun, Nov 24 at **01:00 PM**	**Afternoon workshop competition** (Afternoon Speech Class) in **Lecture Hall A** at the **MTA University**	cost: **included**
☐ Sun, Nov 24 at **04:00 PM**	**Award Ceremony** (Awards Ceremony) in **Convocation Hall** at the **MTA University**	cost: **$-5.00**

Deal price	$ 10.00 Actual Deal Cost: $ 15.75 Deal Savings: $ 5.75 or 37 % 15.75
Sell start date	📅 Note: This date and time will make the deal option appear.
Sell end date	📅
Usage limit	0 (0 for unlimited)

[+] Add a package deal

If an activity from an activity type is selected, any activities from this activity type will be enough to trigger the package deal.

When the deal is created, you can use the deal savings to craft the promotional message.

MORNING STRETCH
Come to the morning workshop and eat with us and get over 30% off!
$16 $10
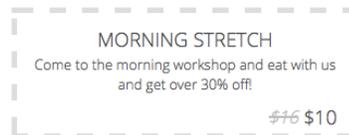
Clicking on "Edit Activities" will return you to the previous phase or clicking on "Save And Continue" will save all package deals and advance you to the next phase, **Event Overview and status**.

| Edit event details and coupons | Edit venues and facilities | Edit Activities | Save And Continue | Event Summary | Back to event |

New Event page (Step 5: Overview and status)

The final phase allows you to see an overview of all event details, venues and facilities, event schedule, coupons and package deals created.

You can click on any previous phase to update or remove any settings already entered.

Once you are satisfied that you have all the details needed to make this event ready for the members, toggle "Yes" as the event is ready to be displayed.

Edit Event page

The **Edit Event Page** provides the exact same elements as the New Event page phases.

Event Communications functionality

As an Event Manager, you have the ability to send a mass communication to all attendees easily and effectively. As noted in the screen capture below, any message created and sent here will also appear in the attendee info tab in the event the email does not reach the recipient.

Event Communication listing page

1- The "Send Now" button will send this message, by email, to all recipients.
2- The "Send in" button will use # of days provided to delay the sending of the communication.
3- The "Edit Message" button will allow you to make changes to this message only before it is sent.
4- The "Delete button will discard the message permanently.
5- The "View Message" button shows or hides the message content itself.
6- The "New Attendee Communication" button brings you to the **New Attendee Message** page.

7- Once a message is sent and displayed on the Attendee Info tab of a given event, you can hide the message by checking the option "Hide from attendee view".

New Message

1- Using the drop down, you can choose the sender this message should be from.
2- Each message MUST have a subject in order to be sent.
3- The message content box is where you craft your message.

To add a link inside of your message, simply:
 (A) Highlight the word you wish to make into a link.
 (B) Click on the 'link creation' button
 (C) Provide the URL and click the "insert link" button to create the link.

Event Attendee Documentation functionality

As an event organizer, you also have the option to provide attendees with documents (PDFs) of information of use to attendees. These documents, once made visible, are displayed on the Attendee Info Page. In the Event Management tabs under the "Documents For Attendees" tab you will find the list documents and an option to add a new document.

Add an Event Attendee Document

1- Clicking on "Add a document for attendees" will load a new blank document holder you'll use to upload your document, enter a title and description and make it visible to attendees

2- Clicking on the "pencil" will allow you to edit each the title of this document holder and the description of the attached document. After your change, clicking the "Save" button saves you changes.


3- Clicking "Browse" will let you find the file on your local computer and clicking "upload" will attach it to your document holder.

4- Once the document is attached, clicking on the "View Attachment" button will open the attached document in a new browser window. This matches the behavior attendee's will see on the Attendee Info tab of a given event.
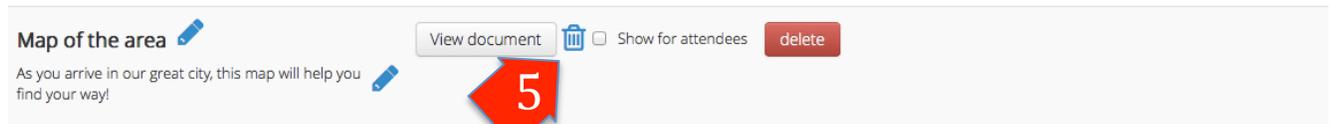
5- Clicking on the "Trash can" icon will delete the attached document to allow you to attach a different document.
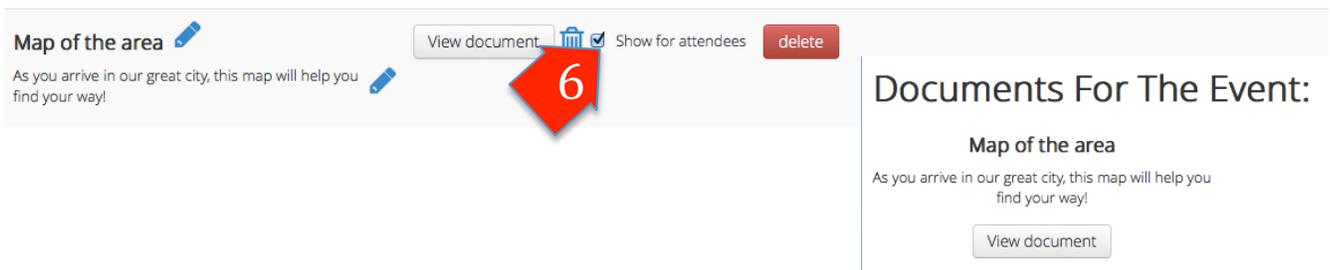
6- Clicking on "Show for attendees" will display the event document on the **Attendee Info** page.
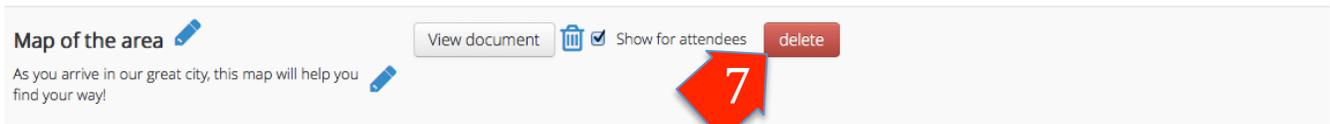
7- Click on the "delete" button will permanently delete the event attendee document.

Organization Manager

As an Organization Manager, you can modify the details of your organization, change the role and group of users in your organization approve or decline association requests as well as access a list of events you can add to your existing website. Manage other Organizational Managers and below.

Organization Details functionality

Corner Stone Academy Management

Details   Organization Association Requests (0)   Event List For Websites   Organization Events   All Organization Registration Invoices   All Organization Users

Manage Details

Account Details:

Name	Corner Stone Academy
Description	
Primary contact name and phone number	
Secondary contact name and phone number	
Civic address 1	
Civic address 2	
What city or town is it in	Enter a location
Mailing address line 1	
Mailing address line 2	
Mailing address location province or state and country	Enter a location
Mailing address postal or zip code	
Contact phone 1	
Contact phone 2	
Contact fax	

Organization Logo:

Browse…   No file selected.

(square format, 500x500)

Primary Organization Manager:

Primary organization manager   Mr John Orgman ▾

Organization Groups:

Group: red   [-] Remove

Group: blue

[+] Add an organization group

1- Click the "Details" tab to view this organization's settings and details.
2- The organization's mailing details are required to provide to members who register should they wish to send a cheque.
3- Clicking browse will let you find a logo that will be visible for all of your events.
4- The Organization Manager is who receives system email notices for association requests.
5- Organization groups are used to help manage and group together members of your organization and is meant to mirror existing groupings. Each organization has a default base group if no groups are used.

6- The Organization Types, only editable by the Accounts Manager, are part of the choices you have when creating events.

7- Registration owners, choosing to pay for ticket through PayPal, need your PayPal Account email address is used to direct the funds. This field is only editable by your Accounts Manager to ensure accuracy and readiness.

Organization Type(s):

Freemasons - Blue Lodge

PayPal Account:

Paypal account email address

denis-facilitator@themindstemsgroup.com
This field is only editable by your Accounts Manager.

This will be used to allow registration payments to be made for events you host.

Save   Cancel

Organization Association Requests functionality

As an Organization Manager, you are able approve or decline Organization Association Requests created by individual members or add members to your organization yourself.

Organization Association Request Approval

When a member requests an association, you will receive an email notifying you of this. By clicking on the "Organization Association Request(s)" tab in the Organization Management view, you'll see a listing of any requests waiting your decision.

The Center Square Group Management Other organizations: The Center Square Group

| Details | Organization Association Requests (1) | Event List For Websites | Organization Events | All Organization Registration Invoices | All Organization Users |

User association requests:

Requestor	Current Organization(s) Associated With	Action
Jim Smart	• Corner Stone Academy, Event Attendee	Approve Decline

Create a new user association:

User you would like to associate with this organization: Email Address Only 🔍

1- Clicking "Approve" adds the requestor as an Event Attendee in the organization's base group. A notification email is automatically sent informing the member they have been approved.

2- Clicking "Decline" will delete the request and send a notification email to the requestor of this decision.

Organization Association Request – Manual Creation

1- You can also add a member registered with FraternalEvents.com by typing their **email address** in the appropriate field and pressing the search button "Magnifying glass". By design, no hint is provided. This is to ensure you have the correct email address required.

If a newly associated member was previously associated and later disassociated, you will see a special message indicating this, but allow the re-association.

2- By clicking on "Add user to this Organization" will make them a member and send the new associate member a welcome email.

Organization Users Management

As an Organization Manager, you now have the ability to disassociate members and modifying a members group.

Organization User Management Listing page

1- When viewing all members associated with this organization, you can disassociate a member by clicking on "Disassociate". This sends the disassociated member an email indicating this decision and removes them from the organization.
2- While editing a member's account details, you now have access to change their group as well as their role and member ID and card ID information.

Event List For Website functionality

To accommodate organizations with an existing website, this special feature allows web designers to simply copy and paste this list of events into the organization's website and allow guests to fetch the details of your events as a shortcut to sending them to the front FraternalEvents.com event listing.

Event List For Website page

1- Clicking "Event List For Websites" will show you the list detail above.
2- Select and copy this HTML code block to your clipboard and pasting it in a website automatically generates an iFrame that can be customized for event listing.
3- This listing is a preview of what you'll see once the code is in place.

All Organization Registration Invoices

Just as EACs have access to their registration invoices, So does EH, EMS and OMs. From here you can view, complete, receive cheque payment or revert to pre-payment or reprocess to PayPal if needed.

Listing of organization registration invoices.

If a registration has no attendees, or is empty, but in progress, you will have the option to delete it.

For any clarifications, questions or suggestions, send us an email at
registration@fraternalevents.com

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