

Event Creation Overview

The complexity of event-creation is highly dependent on the *type* of event being created. Much of the complexity is determined by the Event Type, which you'll need to select during event creation. Event Types largely control the features and settings that can be configured; you can think of them as templates that dictate which building blocks are available, with the most important being the registration process.

Supported registration processes

Higher Logic supports five overarching registration processes:

- **No Registration** - For events you simply want to add to your Event Calendar to keep your members aware of your chapter's upcoming events. Event types using this registration type are open to members and the public.
- **Link to External Registration System** - For events where registration is handled by a third-party system. You'll provide the link to your registration system during event creation. Event types using this registration type are open to members and the public.
- **RSVP Only** - For events where formal registration (or payment) isn't required but users still must acknowledge their attendance by RSVP. This enables an attendee roster to be tracked, which is perfect for events like webinars, fun-runs, and various work functions. Event types using this RSVP registration type are open to members only. *AFP has created an RSVP event type which uses a different registration type and allows for it to be open to members and the public.*
- **Simple** - Generally, simple member/non-member pricing is used for this type of registration, but more complex pricing can be set up, if needed. Event types using this registration type are open to members and the public.
- **Full** - Full registration allows you to ask specific questions of your attendees such as badge name, special needs (e.g. dietary restrictions, etc.), as well as up to ten customizable additional fields. Event types using this registration type are open to members only.

AFP has established several event types using these categories. For more information regarding the AFP chapter event types available, please see [Types Of Events You Can Set Up On Your Chapter Website - Event Type Descriptions](#).

In this document you will find information regarding the following topics:

[Establishing a Payment Provider](#)

[Creating an External Registration Event](#)

[Creating a No Registration Event](#)

[Creating a Simple Registration Event](#)

[Creating a Full Registration Event](#)

[Creating an RSVP Only Event](#)

[Managing Your Registrant Roster](#)

Establishing a Payment Provider

Chapter event registration online payments are handled by one of three supported payment providers:

- **PayPal Express Checkout** - Configuration achieved with the email address on which the account is based
- **CyberSource Secure Acceptance** - Configuration achieved with Profile ID, Access Key, and Secret Key
- **Stripe Checkout** - Configuration achieved with Secret Key and Publishable Key.

Simply select the payment provider that works best for your AFP Chapter.

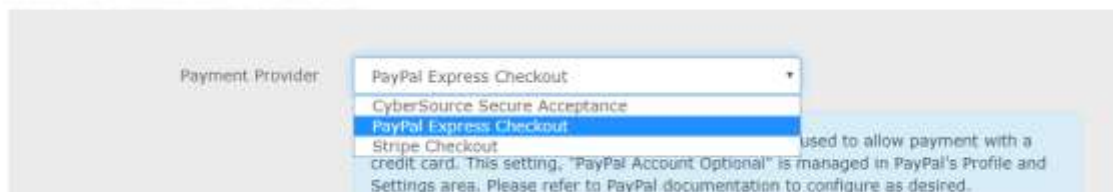
Where to establish a default payment provider

To establish a provider in Higher Logic, you'll need an account with the chosen provider, along with the provider's specific configuration parameter(s). You can find information on how to do so in the next section. Once you have an account established with a provider, you will set up the payment provider for your chapter events by accessing your AFP chapter site, then clicking on the Settings button in the upper right corner of the page, and then selecting Event Payment Providers under the Events heading.



You will then be taken to the Manage Payment Provider Screen.

MANAGE PAYMENT PROVIDER



Follow the instructions, below, based upon which payment provider you are using.

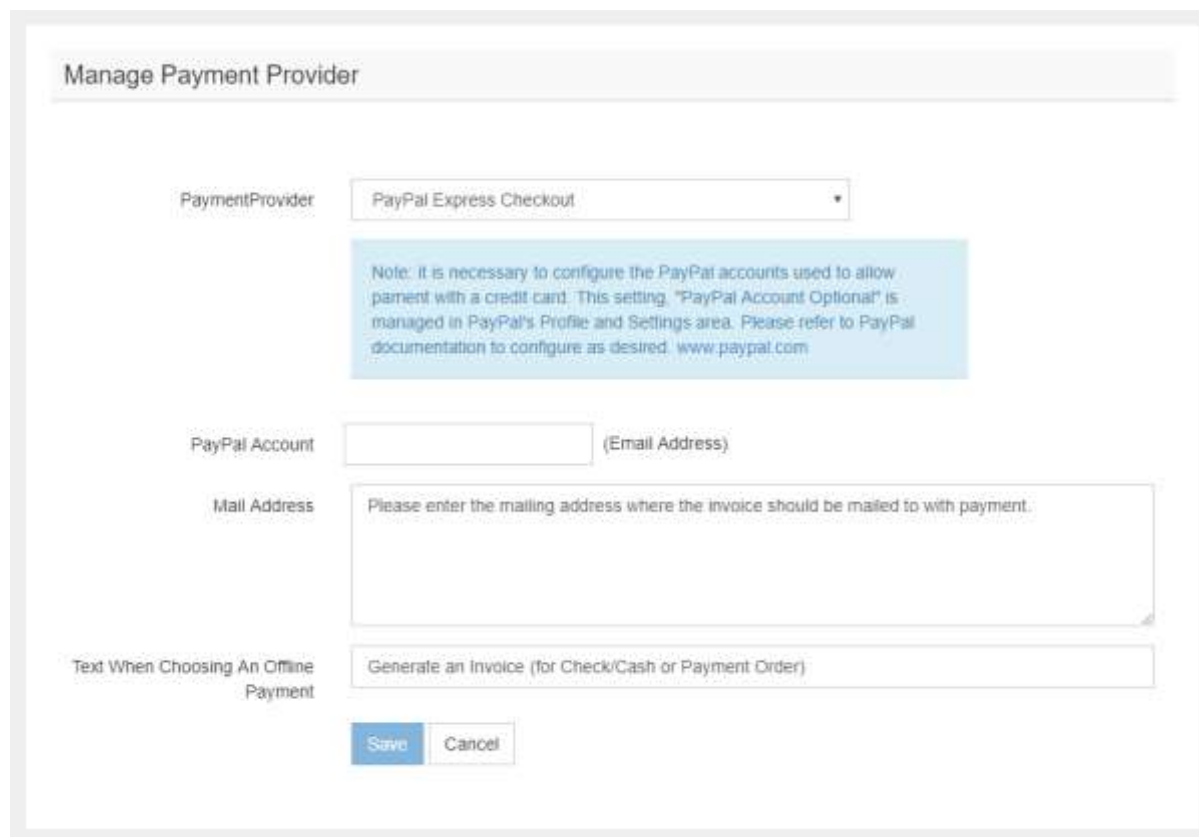
How to establish a payment provider

As mentioned above, you can select one of three payment providers to process your event registration payments. To establish a provider in Higher Logic, you'll need an account with the chosen provider, along with the provider's specific configuration parameter(s).

PayPal Express Checkout

On the Higher Logic side, all you need to do is provide the email address for the PayPal Account you're using.

NOTE: PayPal can process both credit cards and those that have a PayPal account. Make sure your account allows credit card payments. This setting, "PayPal Account Optional," is managed in PayPal's *Profile and Settings* area. Please refer to PayPal documentation for additional configuration information. Click [HERE](#) to create an account, if needed.



The screenshot shows a web form titled "Manage Payment Provider". The "PaymentProvider" dropdown menu is set to "PayPal Express Checkout". A blue informational box contains the text: "Note: it is necessary to configure the PayPal accounts used to allow payment with a credit card. This setting, 'PayPal Account Optional' is managed in PayPal's Profile and Settings area. Please refer to PayPal documentation to configure as desired. www.paypal.com". Below this, the "PayPal Account" field is empty, with "(Email Address)" written to its right. The "Mail Address" field is empty, with the placeholder text "Please enter the mailing address where the invoice should be mailed to with payment." The "Text When Choosing An Offline Payment" field contains the text "Generate an Invoice (for Check/Cash or Payment Order)". At the bottom, there are "Save" and "Cancel" buttons.

Then, if accepting offline payments:

- Enter the mailing address where the invoice should be mailed with payment
- Verify the text to display to users choosing offline payments

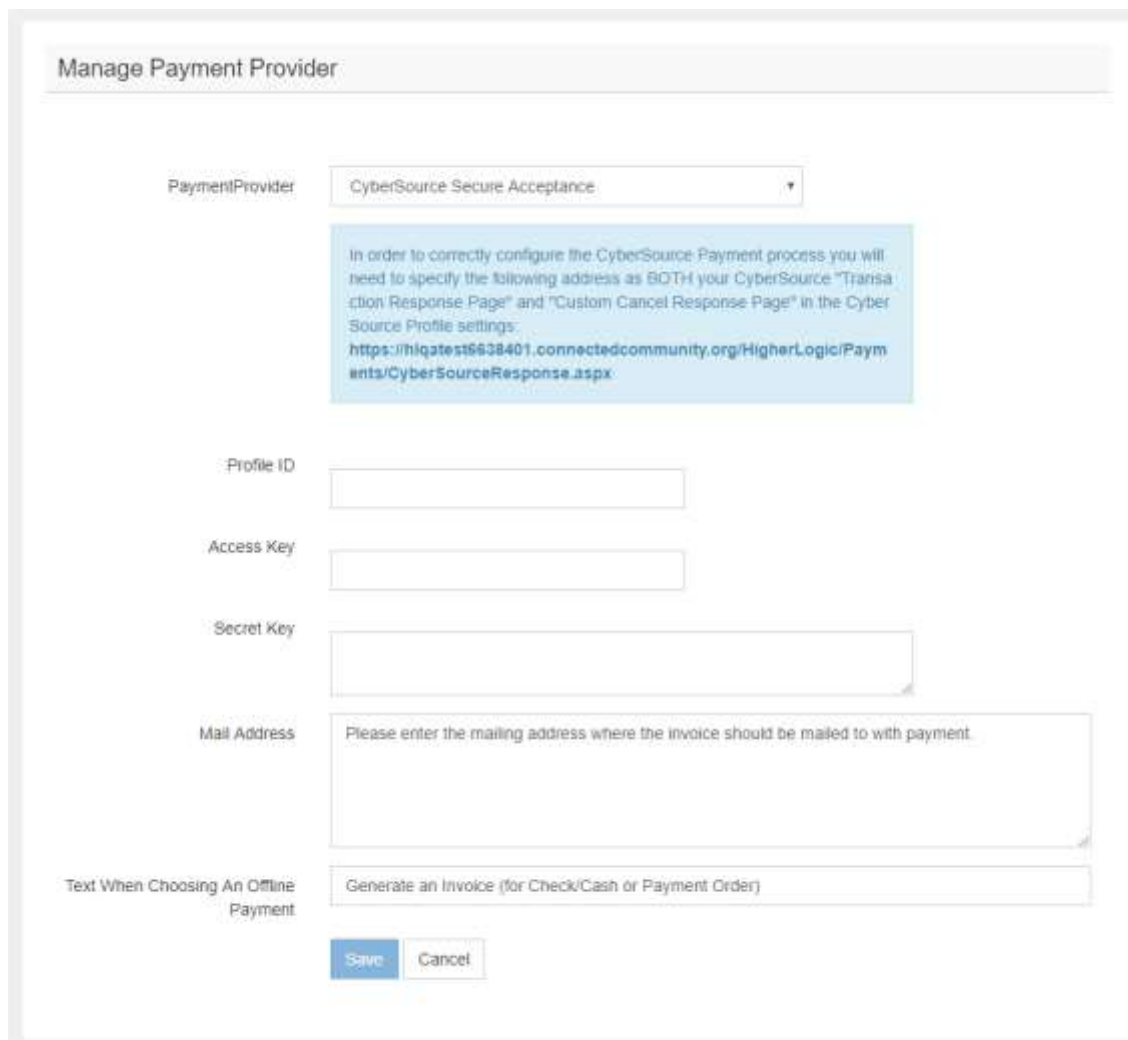
Lastly, save the settings and test to ensure payment routing is as desired.

CyberSource Secure Acceptance

NOTE: Click [HERE](#) to create an account, if needed.

On the Higher Logic side, you need to:

1. Provide the Profile ID, Access Key, and Secret Key for the CyberSource Account you're using.
2. Set the URL provided in the note below the *Payment Provider* menu as BOTH your CyberSource "Transaction Response Page" and "Custom Cancel Response Page" in the CyberSource Profile settings.



The screenshot shows a web form titled "Manage Payment Provider". The "PaymentProvider" dropdown menu is set to "CyberSource Secure Acceptance". A blue callout box contains the following text: "In order to correctly configure the CyberSource Payment process you will need to specify the following address as BOTH your CyberSource 'Transaction Response Page' and 'Custom Cancel Response Page' in the CyberSource Profile settings: <https://hlgatest6628401.connectedcommunity.org/HigherLogic/Payments/CyberSourceResponse.aspx>". Below this, there are input fields for "Profile ID", "Access Key", and "Secret Key". The "Mail Address" field contains the placeholder text "Please enter the mailing address where the invoice should be mailed to with payment.". The "Text When Choosing An Offline Payment" field contains the text "Generate an Invoice (for Check/Cash or Payment Order)". At the bottom, there are "Save" and "Cancel" buttons.

Then, if accepting offline payments:

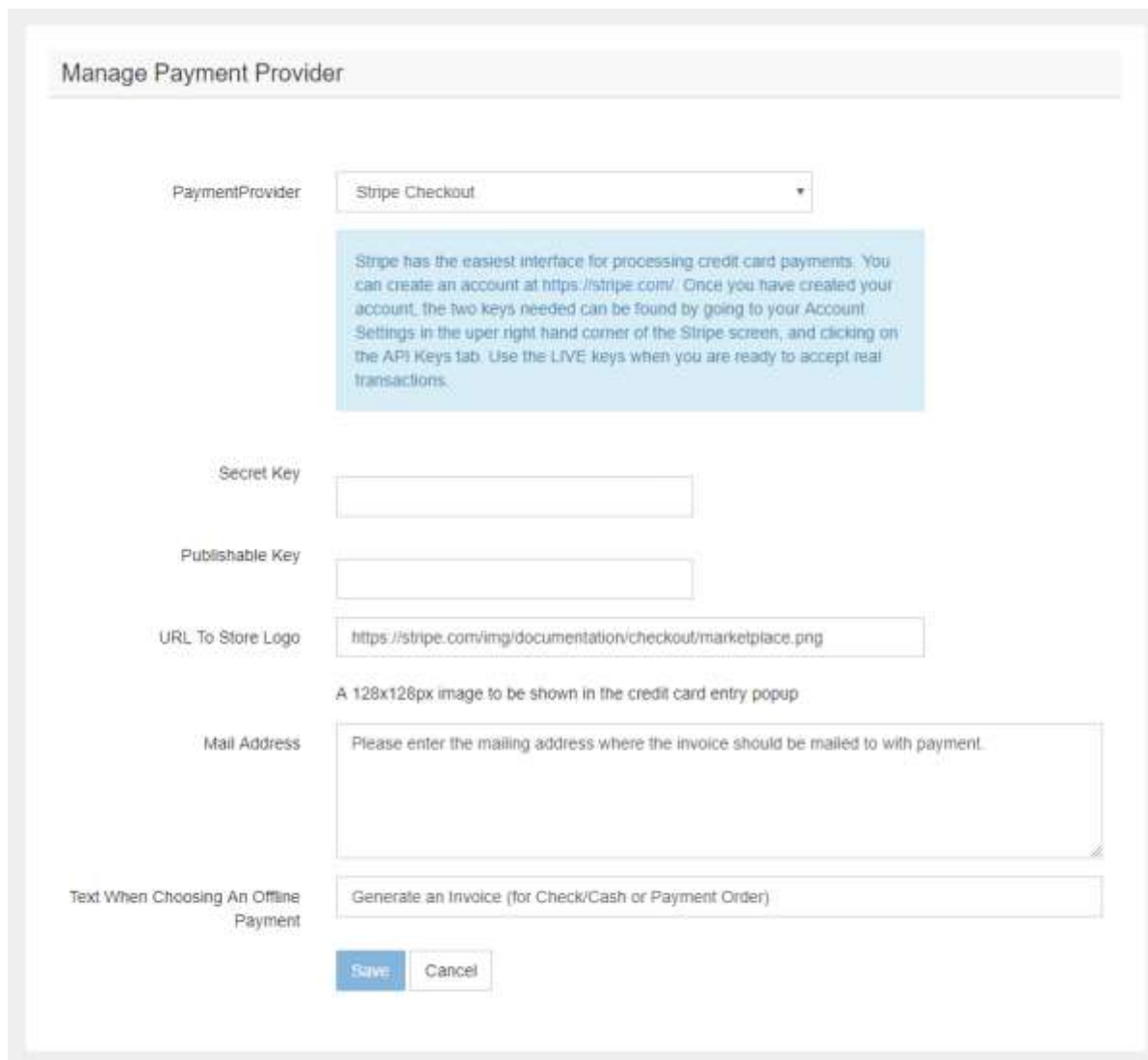
- Enter the mailing address where the invoice should be mailed with payment
- Verify the text to display to users choosing offline payments

Lastly, save the settings and test to ensure payment routing is as desired.

Stripe Checkout

On the Higher Logic side, you need to provide the Secret Key and Publishable Key for the Stripe Account you're using.

NOTE: Stripe has the easiest interface for processing credit card payments. Click [HERE](#) to create an account, if needed. The two keys required can be found by going to your Account Settings in the upper right-hand corner of the Stripe page. Then, click the *API Keys* tab. Use the LIVE keys when you are ready to accept real transactions.



The screenshot shows a 'Manage Payment Provider' form. At the top, the title 'Manage Payment Provider' is displayed. Below it, the 'PaymentProvider' dropdown menu is set to 'Stripe Checkout'. A blue callout box contains the following text: 'Stripe has the easiest interface for processing credit card payments. You can create an account at https://stripe.com/. Once you have created your account, the two keys needed can be found by going to your Account Settings in the upper right hand corner of the Stripe screen, and clicking on the API Keys tab. Use the LIVE keys when you are ready to accept real transactions.' Below the callout, there are several input fields: 'Secret Key' (empty), 'Publishable Key' (empty), 'URL To Store Logo' (containing 'https://stripe.com/img/documentation/checkout/marketplace.png'), 'Mail Address' (containing 'Please enter the mailing address where the invoice should be mailed to with payment.'), and 'Text When Choosing An Offline Payment' (containing 'Generate an Invoice (for Check/Cash or Payment Order)'). At the bottom, there are 'Save' and 'Cancel' buttons.

Then, if accepting offline payments:

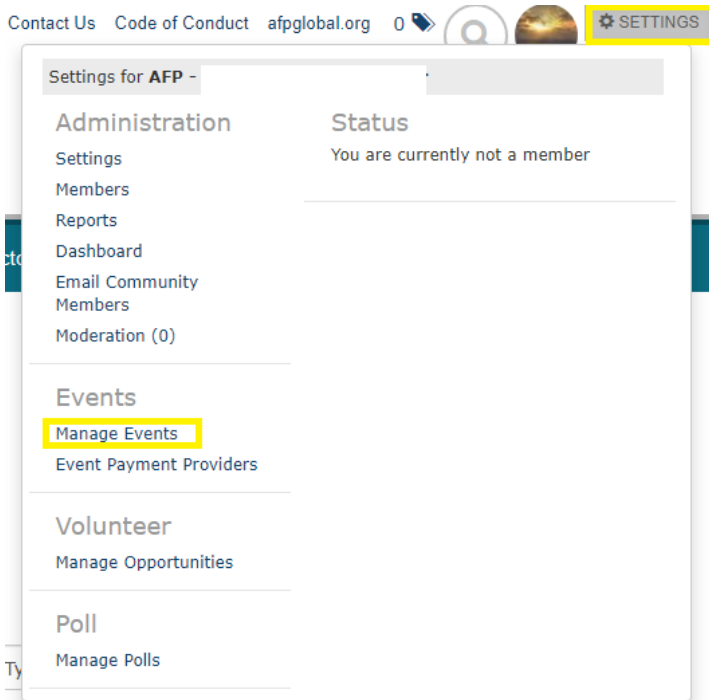
- Enter the mailing address where the invoice should be mailed with payment
- Verify the text to display to users choosing offline payments

Lastly, save the settings and test to ensure payment routing is as desired.

Creating an External Registration Event

Step 1 – Open the Add Event form

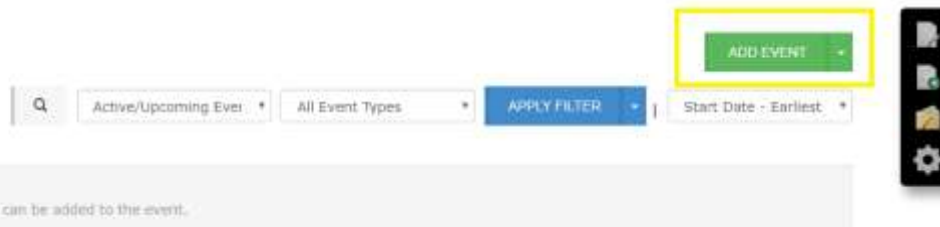
1. Navigate to the chapter's **Manage Events** page. Click on the Settings button in the upper right-hand corner of the page and click on Manage Events.



2. Click **Add Event**.

MANAGE EVENTS

Manage Events



Step 2 - Complete the Add Event form

Configure the event, as desired. Each available field is described in the table below.

Field	Description
Details	
Title	Give your event an appropriate title.
Event Type	Select the External Registration type available. <ul style="list-style-type: none">• AFP Chapter Event – External Registration Members & Public <i>Audience/Registrants: Both Members and Public can view and register.</i> Use this type to set up an event viewable by members and the public and link to an external registration process. Allows for multi-day events. You also can note the event presenter.
Community	NOTE: Your chapter will be pre-selected here.
Display in events list?	Sets the event's visibility setting, allowing you to decide how/if you want to display this event on the <i>Upcoming Events</i> page. You have three options: <ol style="list-style-type: none">1. Do not display the event at all2. Display the event until its end date, and then hide it3. Always display the event (never hide it)
Display in search results?	Sets the event's search visibility setting, allowing you to decide how/if you want this event to be searchable. You have three options: <ol style="list-style-type: none">1. Do not display the event at all2. Display the event until its end date, and then hide it3. Always display the event (never hide it)
Description	Provide all relevant information about your event attendees will need to know. This description appears on the event's Details page.
Optional link for an external website with more details	If there's an external website containing information about this event you want to link to, enter its URL here.

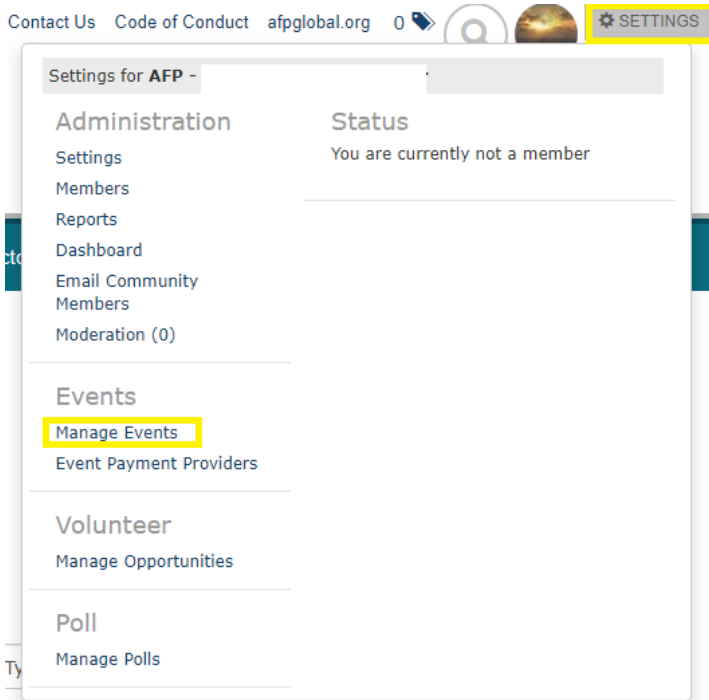
Field	Description
Event Image	If there's an image or official logo you want to display for the event, click <i>Upload Image</i> and browse for it. This image is used as a thumbnail on the <i>Upcoming Events</i> page and a 300px image on the event's Details page.
Date & Time	
Start/End	Select the event's date and start/end time.
Timezone	Select the event's timezone.
Location	
How will people attend this event?	<p>The options available here are determined by the Event Type. Three choices are possible (you can select more than one, if applicable for your event):</p> <ul style="list-style-type: none"> • Physical Address - If selected, provide the venue name, address, city, and zip code. • Conference Call - If selected, provide the applicable dial-in instructions. • Online - If selected, provide the applicable login instructions and conference web address/URL.
Country	Select the country where the event is taking place.
Contact Information	
Provide the event's point of contact information, if applicable.	
<p>NOTE: If you're the point of contact, you can click <i>Insert My Contact Information</i> to have the system pull this information from your profile (as long as you've filled it out).</p>	
External Registration	
Enter the URL to your external registration system here. When users click to register for the event, they'll automatically be taken to this URL.	

Click **Save** when you're finished to create the event.

Creating a No Registration Event

Step 1 – Open the Add Event form

3. Navigate to the chapter's **Manage Events** page. Click on the Settings button in the upper right-hand corner of the page and click on Manage Events.



4. Click **Add Event**.

MANAGE EVENTS

Manage Events

Active/Upcoming Event | All Event Types | APPLY FILTER | Start Date - Earliest

ADD EVENT

No data was found.
No contacts from the community can be added to the event.

Step 2 - Complete the Add Event form

Configure the event, as desired. Each available field is described in the table below.

Field	Description
Details	
Title	Give your event an appropriate title.
Event Type	Select the No Registration type available. <ul style="list-style-type: none">• AFP Chapter Event - No Registration Members & Public <i>Audience: Both Members and Public can view.</i> Use this type to simply place an event on the calendar that is viewable by members and the public. There is no need to have those interested in attending register or RSVP. Allows for multi-day events. You also can note the event presenter.
Community	NOTE: Your chapter will be pre-selected here.
Display in events list?	Sets the event's visibility setting, allowing you to decide how/if you want to display this event on the <i>Upcoming Events</i> page. You have three options: <ol style="list-style-type: none">4. Do not display the event at all5. Display the event until its end date, and then hide it6. Always display the event (never hide it)
Display in search results?	Sets the event's search visibility setting, allowing you to decide how/if you want this event to be searchable. You have three options: <ol style="list-style-type: none">4. Do not display the event at all5. Display the event until its end date, and then hide it6. Always display the event (never hide it)
Description	Provide all relevant information about your event attendees will need to know. This description appears on the event's Details page.
Optional link for an external website with more details about this event	If there's an external website containing information about this event you want to link to, enter its URL here.

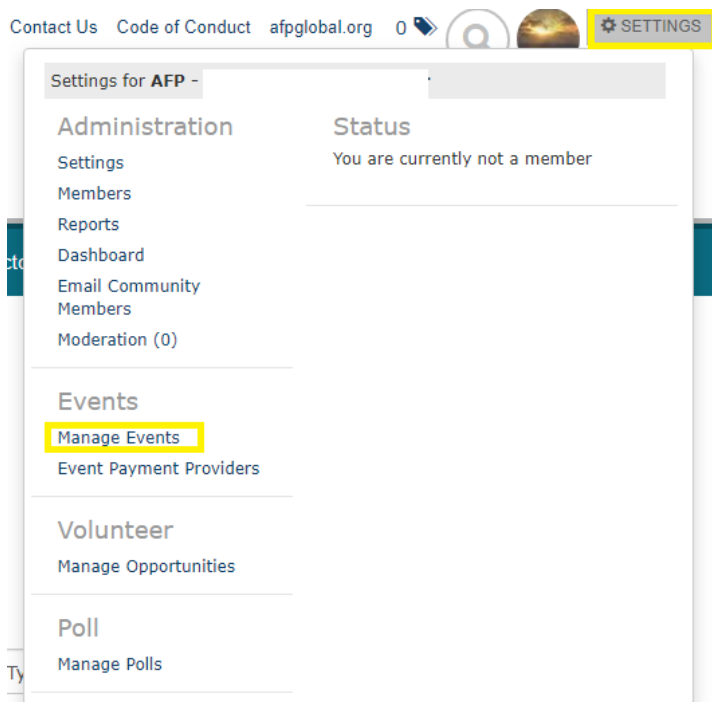
Field	Description
Event Image	If there's an image or official logo you want to display for the event, click <i>Upload Image</i> and browse for it. This image is used as a thumbnail on the <i>Upcoming Events</i> page and a 300px image on the event's Details page.
Date & Time	
Start/End	Select the event's date and start/end time.
Timezone	Select the event's timezone.
Location	
How will people attend this event?	<p>The options available here are determined by the Event Type. Three choices are possible (you can select more than one, if applicable for your event):</p> <ul style="list-style-type: none"> • Physical Address - If selected, provide the venue name, address, city, and zip code. • Conference Call - If selected, provide the applicable dial-in instructions. • Online - If selected, provide the applicable login instructions and conference web address/URL.
Country	Select the country where the event is taking place.
Contact Information	
Provide the event's point of contact information, if applicable.	
<p>NOTE: If you're the point of contact, you can click <i>Insert My Contact Information</i> to have the system pull this information from your profile (as long as you've filled it out).</p>	

Click **Save** when you're finished to create the event.

Creating a Simple Registration Event

Step 1 – Open the Add Event form

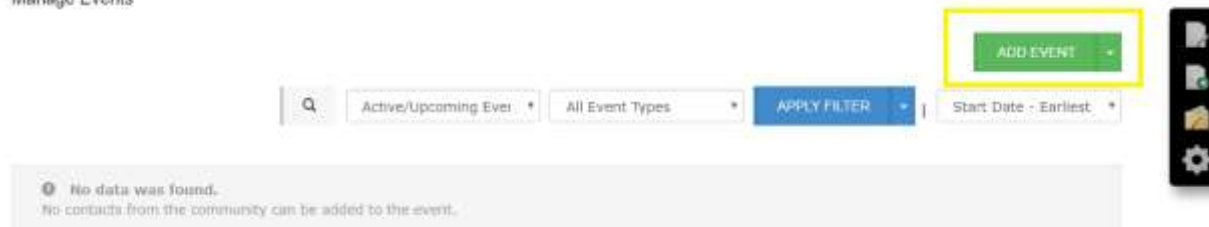
5. Navigate to the chapter's **Manage Events** page. Click on the Settings button in the upper right-hand corner of the page and click on Manage Events.



6. Click **Add Event**.

MANAGE EVENTS

Manage Events



Step 2 - Complete the Add Event form

Configure the event, as desired. Each available field is described in the table below. Click **Save** when you're finished to create the event.

Field	Description
Details	
Title	Give your event an appropriate title.
Event Type	<p>Select the appropriate Simple Registration type. There are two options to choose from:</p> <ul style="list-style-type: none">• Paid Event Payment Online & Offline Simple Registration Members & Public <i>Audience/Registrants: Both Members and Public can view and register.</i> Use this type to set up a paid event that allows for both online and offline payments and is viewable by members and the public. Members are required to login to receive the member rate assigned. Allows for multi-day events. You also can note the event presenter, and can assign multiple registrant classes (such as speaker and sponsor).• Paid Event Payment Online Only Simple Registration Members & Public <i>Audience/Registrants: Both Members and Public can view and register.</i> Use this type to set up a paid event that only allows for online payment (does not allow offline payments) and is viewable by members and the public. Members are required to login to receive the member rate assigned. Allows for multi-day events. You also can note the event presenter, and can assign multiple registrant classes (such as speaker and sponsor).
Community	<p>NOTE: Your chapter will be pre-selected here.</p>
Display in events list?	<p>Decide how/if you want to display this event on the <i>Upcoming Events</i> page. You have three options:</p> <ol style="list-style-type: none">1. Do not display the event at all2. Display the event until its end date, and then hide it3. Always display the event (never hide it)
Display in search results?	<p>Decide how/if you want this event to be searchable. You have three options:</p> <ol style="list-style-type: none">1. Do not display the event at all2. Display the event until its end date, and then hide it3. Always display the event (never hide it)
Description	Provide all relevant information about your event attendees will need to know. This description appears on the event's Details page.

Field	Description
Optional link for an external website with more details	If there's an external website containing information about this event you want to link to, enter its URL here.
Event Image	If there's an image or official logo you want to display for the event, click <i>Upload Image</i> and browse for it. This image is used as a thumbnail on the <i>Upcoming Events</i> page and a 300px image on the event's Details page.
Maximum number of registrants?	By default, event registration is unlimited, but if you have a need to limit it (e.g., venue capacity, etc.), you can set the maximum number of registrations here.
Number of event credits?	If applicable, enter the number of credits attendees will earn by attending this event.

Date & Time

Start/End	<p>Select the event's date and start and end times.</p> <hr/> <p>NOTE: Depending on the Event Type's configuration, you may be able to select a date range (i.e., multi-day event).</p> <hr/>
Timezone	Select the event's timezone.

Location

How will people attend this event?	<p>The options available here are determined by the Event Type. Three choices are possible (you can select more than one, if applicable for your event):</p> <ul style="list-style-type: none"> • Physical Address - If selected, provide the venue name, address, city, and zip code. • Conference Call - If selected, provide the applicable dial-in instructions. • Online - If selected, provide the applicable login instructions and conference web address/URL.
Country	Select the country where the event is taking place.

Contact Information

Provide the event's point of contact information, if applicable.

Field	Description
<p>NOTE: If you're the point of contact, you can click <i>Insert My Contact Information</i> to have the system pull this information from your profile (as long as you've filled it out).</p>	
<p style="text-align: center;">Pricing Options</p>	
<p>Registration Rates</p>	<p>The Event Type's configuration controls the options available here; if enabled, you'll be able to set different rates based on <i>when</i> someone registers: Early, Regular, and Late.</p> <p>From the menu, select the desired options and specify their dates.</p>
<p>Pricing Model</p>	<p>As above, the Event Type's configuration controls the pricing models you'll be able to select here. Options include:</p> <ul style="list-style-type: none"> • Simple - You can set a single price applicable to ALL registrants. * This is the default setting. • Member/Non-Member - You can set a unique price for members AND non-members. Users with Member status are given the Member price, while those without it are given the Non-Member price. • Registrant Class – If your event will include speakers and/or sponsors and you want to use this pricing model, select each one you want to use for your event. For example, if your event will have registered speakers but no sponsors, you would select Chapter Member, Nonmember and Speakers. If you will have registered sponsors at your event but no speakers, then you would select Chapter Member, Nonmember and Sponsors. And if you will have both speakers and sponsors, then you would select Chapter Member, Nonmember, Speakers and Sponsors. * <i>IMPORTANT: You may only use the Chapter Member, Nonmember, Speakers and Sponsors options.*</i> <p>Speakers and sponsors are not able to register themselves for events – this functionality is for you to use! Because event registration on the Higher Logic platform is structured only for member and non-member pricing, the entering of speaker and sponsor registrations must be done by event contacts and coordinators through the backend admin area. Remember, any "regular" members or nonmembers are able to register themselves. Only speakers and sponsors need to be registered by the admin.</p>
<p>Currency Option</p>	<p>Select the currency for this event.</p>

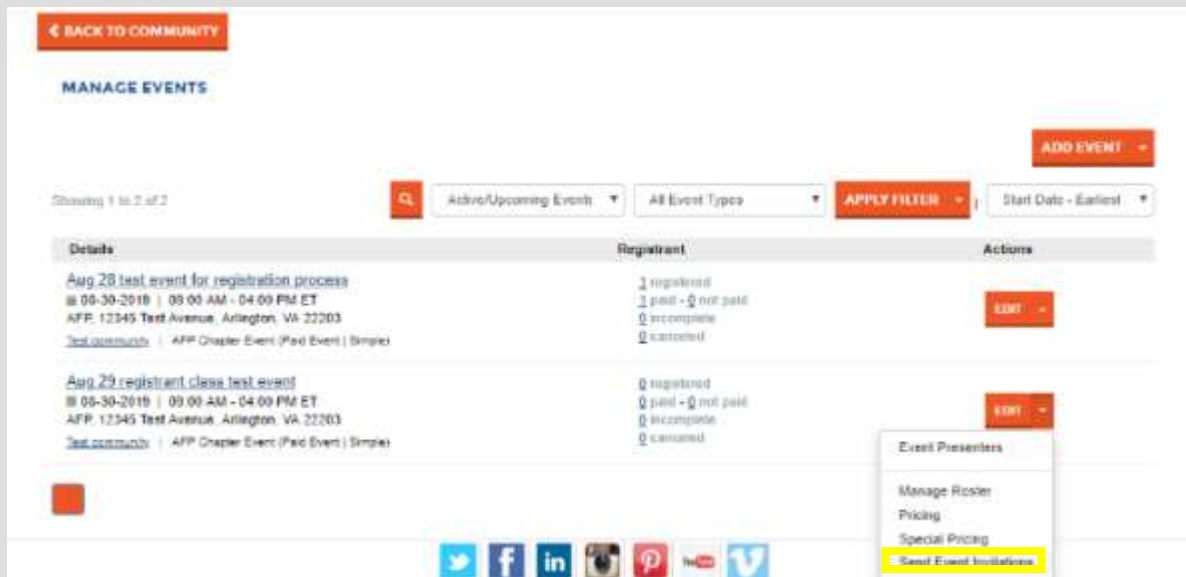
Field	Description
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Send Invitations

If you are ready to send invitations for this event to your chapter members, toggle this setting to YES. This will automatically send out an invitation to all of your chapter community members and simultaneously post your event to your event page once you click Save.

If you want to post your event but NOT invite/notify your community members right away (you may need to go back to edit details, etc.), then keep the setting set to NO and click Save. If you choose this setting, you will still be able to send out invitations to your chapter members manually through the Manage Events screen.

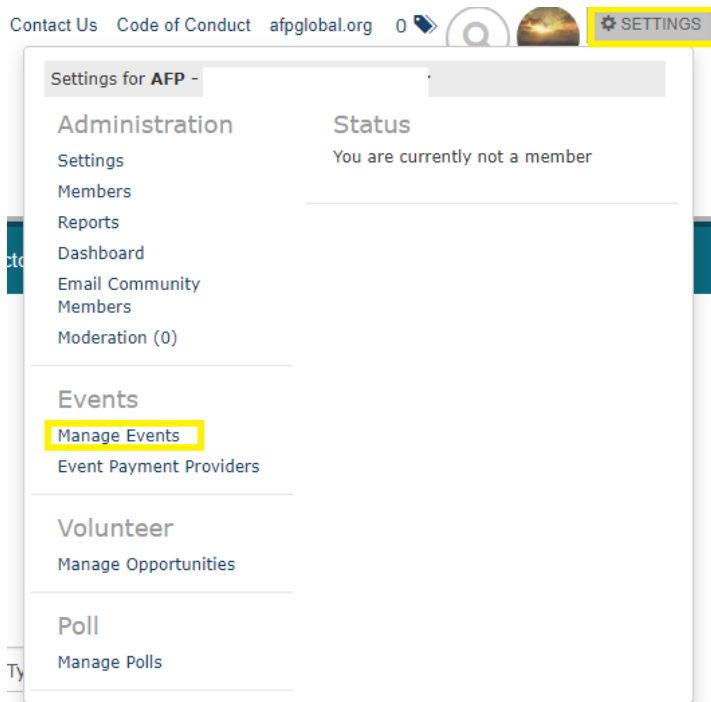
To do so, go to “Settings” and select “Manage Events” under the Event section. Locate the event you want to send an invitation for and click the Edit button down arrow. You will then select “Send Event Invitations”. An Event Invitations pop-up window will appear and you have the ability to either select “All Community Members” or “Specific Users”. If you choose the former, all members of your chapter community will receive the invitation to the event. If selecting the latter, you must type in the name(s) of the individual member(s) of your community you wish to send the invitation to and select the appropriate ones from the list provided to you.



Creating a Full Registration Event

Step 1 – Open the Add Event form

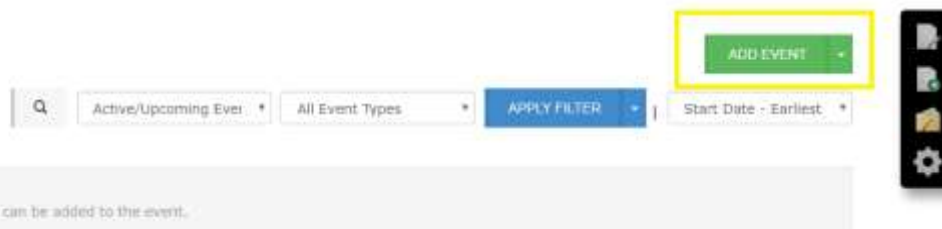
7. Navigate to the chapter's **Manage Events** page. Click on the Settings button in the upper right-hand corner of the page and click on Manage Events.



8. Click **Add Event**.

MANAGE EVENTS

Manage Events



Step 2 - Complete the Add Event form

Configure the event, as desired. Each available field is described in the table below.

Field	Description
Details	
Title	Give your event an appropriate title.
Event Type	<p>Select the appropriate Full Registration type available.</p> <ul style="list-style-type: none">• Paid Event Full Registration Member Login Required Members Only <i>Audience/Registrants: Only Members can view and register.</i> <p>Use this type to set up a paid event only viewable by members (they are required to login to your site to view) and to ask specific questions regarding attendee needs. Allows for multi-day events. You also can note the event presenter, offer online & offline payments, and assign multiple registrant classes (such as speaker and sponsor).</p>
Community	<p>NOTE: Your chapter will be pre-selected here.</p>
Display in events list?	<p>Decide how/if you want to display this event on the <i>Upcoming Events</i> page. You have three options:</p> <ol style="list-style-type: none">1. Do not display the event at all2. Display the event until its end date, and then hide it3. Always display the event (never hide it)
Display in search results?	<p>Decide how/if you want this event to be searchable. You have three options:</p> <ol style="list-style-type: none">1. Do not display the event at all2. Display the event until its end date, and then hide it3. Always display the event (never hide it)
Description	Provide all relevant information about your event attendees will need to know. This description appears on the event's Details page.
Optional link for an external website with more details	If there's an external website containing information about this event you want to link to, enter its URL here.

Field	Description
Event Image	If there's an image or official logo you want to display for the event, click <i>Upload Image</i> and browse for it. This image is used as a thumbnail on the <i>Upcoming Events</i> page and a 300px image on the event's Details page.
Maximum number of registrants?	By default, event registration is unlimited, but if you have a need to limit it (e.g., venue capacity, etc.), you can set the maximum number of registrations here.
Number of event credits?	If applicable, enter the number of credits attendees will earn by attending this event.
Include an "Additional Details" input for registrant?	<p>Controls whether one or more customizable fields are available on the registration form, defined by your organization, allowing you to obtain more information about your registrants.</p> <p>You can include up to 10 customizable additional fields and whether they are required.</p> <p>The values that registrants provide in these fields will display in the Registrant Details area – accessed by going to the Registrant Roster screen (<i>see Registrant Roster section for more information</i>) for the event and then clicking on the down arrow associated with the Registration button for the listed registrant and selecting Registrant Details.</p> <p>The information will also be provided when you export the roster list. The Export button is found on the Registrant Roster screen under the Event Payment Summary area.</p>
Include input for registrant to state special needs?	Controls whether a field is available on the registration form where attendees can add any desired special needs relating to their registration (e.g., food allergies, etc.).
Include badge name input for registrant?	Controls whether a field is available on the registration form where attendees can enter their name for badge printing.
Date & Time	
Start/End	Select the event's date and start/end time.
Timezone	Select the event's timezone.
Location	
How will people attend this event?	<p>The options available here are determined by the Event Type. Three choices are possible (you can select more than one, if applicable for your event):</p> <ul style="list-style-type: none"> • Physical Address - If selected, provide the venue name, address, city, and zip code • Conference Call - If selected, provide the applicable dial-in instructions.

Field	Description
	<ul style="list-style-type: none"> Online - If selected, provide the applicable login instructions and conference web address/URL.
Country	Select the country where the event is taking place.

Contact Information

Provide the event's point of contact information, if applicable.

NOTE: If you're the point of contact, you can click *Insert My Contact Information* to have the system pull this information from your profile (as long as you've filled it out).

Pricing Options

Registration Rates	<p>The Event Type's configuration controls the options available here; if enabled, you'll be able to set different rates based on <i>when</i> someone registers: Early, Regular, and Late.</p> <p>From the menu, select the desired options and specify their dates.</p>
Pricing Model	<p>As above, the Event Type's configuration controls the pricing models you'll be able to select here. Options include:</p> <ul style="list-style-type: none"> Simple - You can set a single price applicable to ALL registrants. Member/Non-Member - You can set a unique price for members AND non-members. Registrant Class – If your event will include speakers and/or sponsors and you want to use this pricing model, select each one you want to use for your event. For example, if your event will have registered speakers but no sponsors, you would select Chapter Member, Nonmember and Speakers. If you will have registered sponsors at your event but no speakers, then you would select Chapter Member, Nonmember and Sponsors. And if you will have both speakers and sponsors, then you would select Chapter Member, Nonmember, Speakers and Sponsors. <i>* IMPORTANT: You may only use the Chapter Member, Nonmember, Speakers and Sponsors options. *</i> <p>Speakers and sponsors are not able to register themselves for events – this functionality is for you to use! Because event registration on the Higher Logic platform is structured only for member and non-member pricing, the entering of speaker and sponsor registrations</p>

Field	Description
	<p>must be done by event contacts and coordinators through the backend admin area.</p> <p><i>Remember, any "regular" members are able to register themselves. Only speakers and sponsors need to be registered by the admin.</i></p>

Currency Option	Select the currency for this event.
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Send Invitations	<p>If you are ready to send invitations for this event to your chapter members, toggle this setting to YES. This will automatically send out an invitation to all of your chapter community members and simultaneously post your event to your event page once you click Save.</p> <p>If you want to post your event but NOT invite/notify your community members right away (you may need to go back to edit details, etc.), then keep the setting set to NO and click Save. If you choose this setting, you will still be able to send out invitations to your chapter members manually through the Manage Events screen.</p> <p>To do so, go to “Settings” and select “Manage Events” under the Event section. Locate the event you want to send an invitation for and click the Edit button down arrow. You will then select “Send Event Invitations”. An Event Invitations pop-up window will appear and you have the ability to either select “All Community Members” or “Specific Users”. If you choose the former, all members of your chapter community will receive the invitation to the event. If selecting the latter, you must type in the name(s) of the individual member(s) of your community you wish to send the invitation to and select the appropriate ones from the list provided to you.</p>
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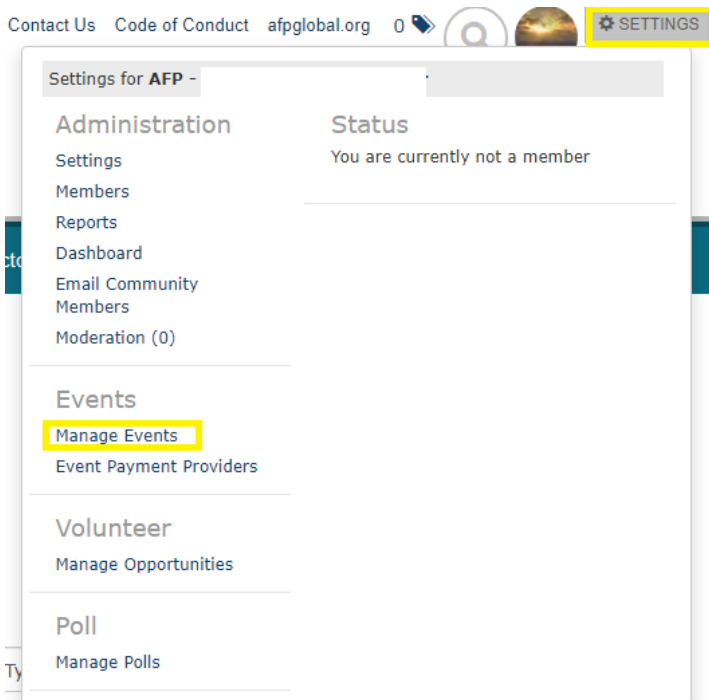


Click **Save** when you're finished to create the event.

Creating an RSVP Only Event

Step 1 – Open the Add Event form

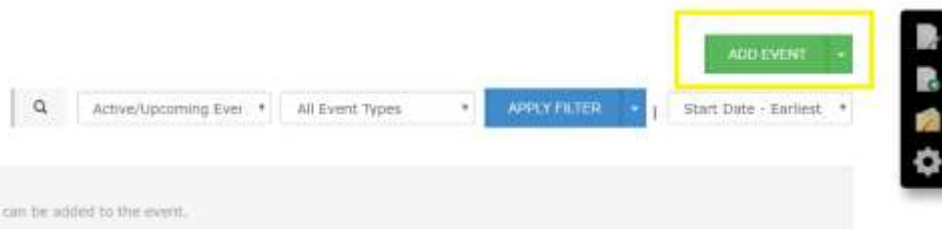
9. Navigate to the chapter's **Manage Events** page. Click on the Settings button in the upper right-hand corner of the page and click on Manage Events.



10. Click **Add Event**.

MANAGE EVENTS

Manage Events



Step 2 - Complete the Add Event form

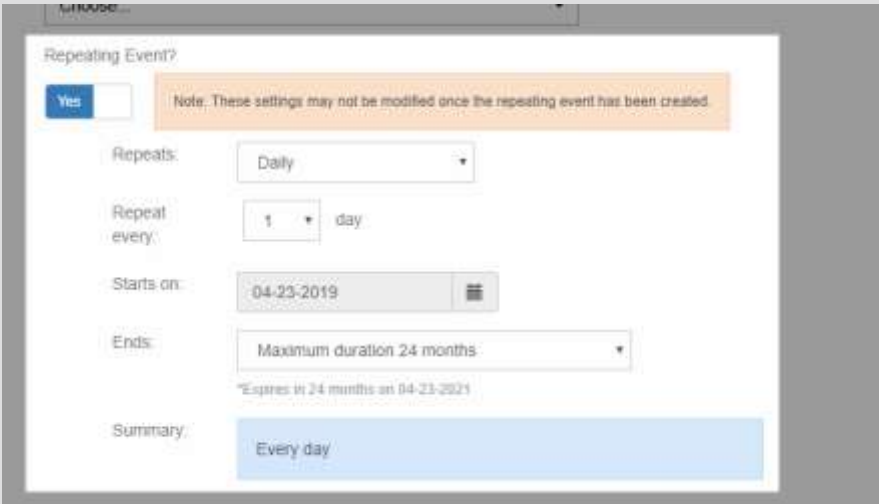
Configure the event, as desired. Each available field is described in the table below. Click **Save** when you're finished to create the event.

Field	Description
Details	
Title	Give your event an appropriate title.
Event Type	<p>Select the appropriate RSVP Only event type. There are four options to choose from:</p> <ul style="list-style-type: none">• Recurring RSVP Only No Payment Uses RSVP Type Members Only <i>Audience/Registrants: Only Members can view and register.</i> Use this type to set up a <u>recurring</u> RSVP event viewable only by members (they are required to login to your site to view). When setting up the recurring event, be sure to toggle to "Yes" for Repeating Event under the Date & Time section and <u>pay close attention to the frequency at which the event will repeat</u>. Allows for repeating event. You also can note the event presenter.• RSVP Only No Payment Uses RSVP Type Members Only <i>Audience/Registrants: Only Members can view and register.</i> Use this type to set up an RSVP event that is viewable only by members (they are required to login to your site to view). Allows for multi-day events. You also can note the event presenter.• RSVP Only No Payment Uses Simple Registration Type Members & Public <i>Audience/Registrants: Both Members and Public can view and register.</i> Use this type to set up an RSVP event that is viewable by members and the public (no login is required). Set price to "0" for event. Allows for multi-day events. You also can note the event presenter.
Community	<p>NOTE: Your chapter will be pre-selected here.</p>
Display in events list?	<p>Decide how/if you want to display this event on the <i>Upcoming Events</i> page. You have three options:</p> <ol style="list-style-type: none">1. Do not display the event at all2. Display the event until its end date, and then hide it3. Always display the event (never hide it)
Display in search results?	<p>Decide how/if you want this event to be searchable. You have three options:</p> <ol style="list-style-type: none">1. Do not display the event at all2. Display the event until its end date, and then hide it3. Always display the event (never hide it)

Field	Description
Description	Provide all relevant information about your event attendees will need to know. This description appears on the event's Details page.
Optional link for an external website with more details	If there's an external website containing information about this event you want to link to, enter its URL here.
Event Image	If there's an image or official logo you want to display for the event, click <i>Upload Image</i> and browse for it. This image is used as a thumbnail on the <i>Upcoming Events</i> page and a 300px image on the event's Details page.

Date & Time

Start/End	Select the event's date and start/end time.
Timezone	Select the event's timezone.

Allow Repeating Events	<p>There is one RSVP only event types that allow for recurring events.</p> <ul style="list-style-type: none"> Recurring RSVP Only No Payment Uses RSVP Type Members Only <p>Toggle Yes to allow repeating events for this Event Type. This feature is ideal for events your organization hosts on a daily, weekly or monthly basis, like meetings, meetups, webinars, etc, reducing the number of events you need to create to account for these reoccurring items.</p> <p>When creating or editing an event, you'll be able to toggle the associated Repeating Event? option to configure when and how the event repeats.</p> <p><u>**Pay close attention to the frequency at which the event will repeat.**</u></p> 
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Location

Field	Description
How will people attend this event?	<p>The options available here are determined by the Event Type. Three choices are possible (you can select more than one, if applicable for your event):</p> <ul style="list-style-type: none"> • Physical Address - If selected, provide the venue name, address, city, and zip code. • Conference Call - If selected, provide the applicable dial-in instructions. • Online - If selected, provide the applicable login instructions and conference web address/URL.
Country	Select the country where the event is taking place.

Contact Information

Provide the event's point of contact information, if applicable.

NOTE: If you're the point of contact, you can click *Insert My Contact Information* to have the system pull this information from your profile (as long as you've filled it out).

Send Invitations	<p>If you are ready to send invitations for this event to your chapter members, toggle this setting to YES. This will automatically send out an invitation to all of your chapter community members and simultaneously post your event to your event page once you click Save.</p> <p>If you want to post your event but NOT invite/notify your community members right away (you may need to go back to edit details, etc.), then keep the setting set to NO and click Save. If you choose this setting, you will still be able to send out invitations to your chapter members manually through the Manage Events screen.</p> <p>To do so, go to “Settings” and select “Manage Events” under the Event section. Locate the event you want to send an invitation for and click the Edit button down arrow. You will then select “Send Event Invitations”. An Event Invitations pop-up window will appear and you have the ability to either select “All Community Members” or “Specific Users”. If you choose the former, all members of your chapter community will receive the invitation to the event. If selecting the latter, you must type in the name(s) of the individual member(s) of your community you wish to send the invitation to and select the appropriate ones from the list provided to you.</p>
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← BACK TO COMMUNITY

MANAGE EVENTS

ADD EVENT +

Showing 1 to 2 of 2

Active/Upcoming Events | All Event Types | APPLY FILTER | Start Date - Earliest

Details	Registrant	Actions
<p>Aug 28 test event for registration process</p> <p>08-30-2018 08:00 AM - 04:00 PM ET</p> <p>AFF: 12345 Test Avenue, Arlington, VA 22203</p> <p>Test community AFP Chapter Event (Paid Event) (Simple)</p>	<p>1 registered</p> <p>1 paid - 0 not paid</p> <p>0 incomplete</p> <p>0 cancelled</p>	<p>EDIT +</p>
<p>Aug 29 registrant class test event</p> <p>08-30-2018 09:00 AM - 04:00 PM ET</p> <p>AFF: 12345 Test Avenue, Arlington, VA 22203</p> <p>Test community AFP Chapter Event (Paid Event) (Simple)</p>	<p>0 registered</p> <p>0 paid - 0 not paid</p> <p>0 incomplete</p> <p>0 cancelled</p>	<p>EDIT +</p>

Event Presenters

- Manage Roster
- Pricing
- Special Pricing
- Send Event Invitations

Twitter Facebook LinkedIn Instagram Pinterest YouTube Tumblr

Click **Save** when you're finished to create the event.

Registrant Roster

Once attendees begin registering for an event, they can all be managed from one place: the **Registrant Roster**. From here, you can quickly see the overall payment summary for the event, how many people are registered, when they registered, as well as the price of their registration and whether they've paid. You can also perform management actions like generating invoice PDFs, adding notes to a registration, and canceling registrations.

Manage Roster

[← Return to Manage Events List](#)

Roster

[Town Hall](#)
Dec 10, 18 - Aug 15, 19 (ET)
Not specified
Community Event

Event Payment Summary		Total Due:	\$0.00
		Total Received:	\$0.00
		Refunded:	-\$0.00
		Balance:	\$0.00

[Email](#) [Add Registrant](#) [Export](#)

Showing 1 to 4 of 4

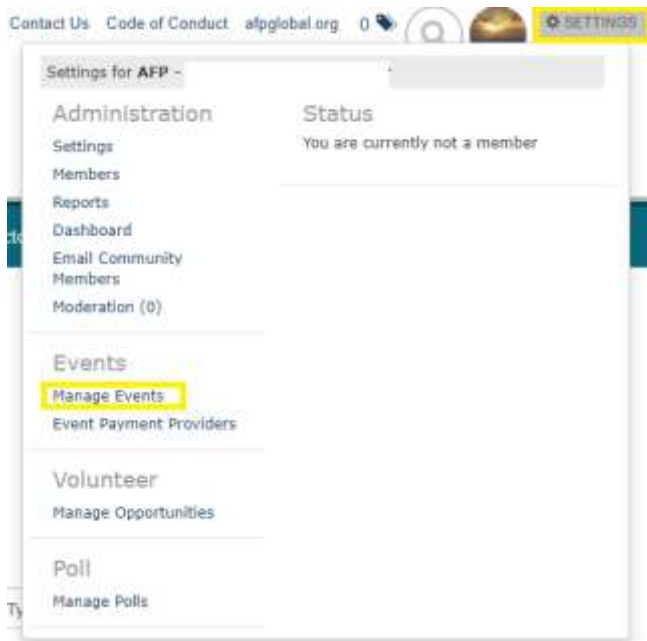
[All Registrations](#) [All Payment Statuses](#) [All Registrant Classes](#) [Last Name A-Z](#)

Registrant	Registration	Price / Payment	Actions	Attendance
Super Man Man Of Steel	Registered by Product Management 11/13/2018 8:40:24 AM Non-member	\$0.00 / \$0.00 ✓	Registration	👍 🗑️
Product Management	Registered 11/12/2018 4:37:57 PM Former Speakers	\$0.00 / \$0.00 ✓	Registration	👍 🗑️
Catherine "Lala" Poon HigherLogic	Registered 8/15/2018 4:39:30 PM Non-member	\$0.00 / \$0.00 ✓	Registration	👍 🗑️
Rich Serdici	Registered by Product Management 11/13/2018 8:39:16 AM Non-member	\$0.00 / \$0.00 ✓	Registration	👍 🗑️

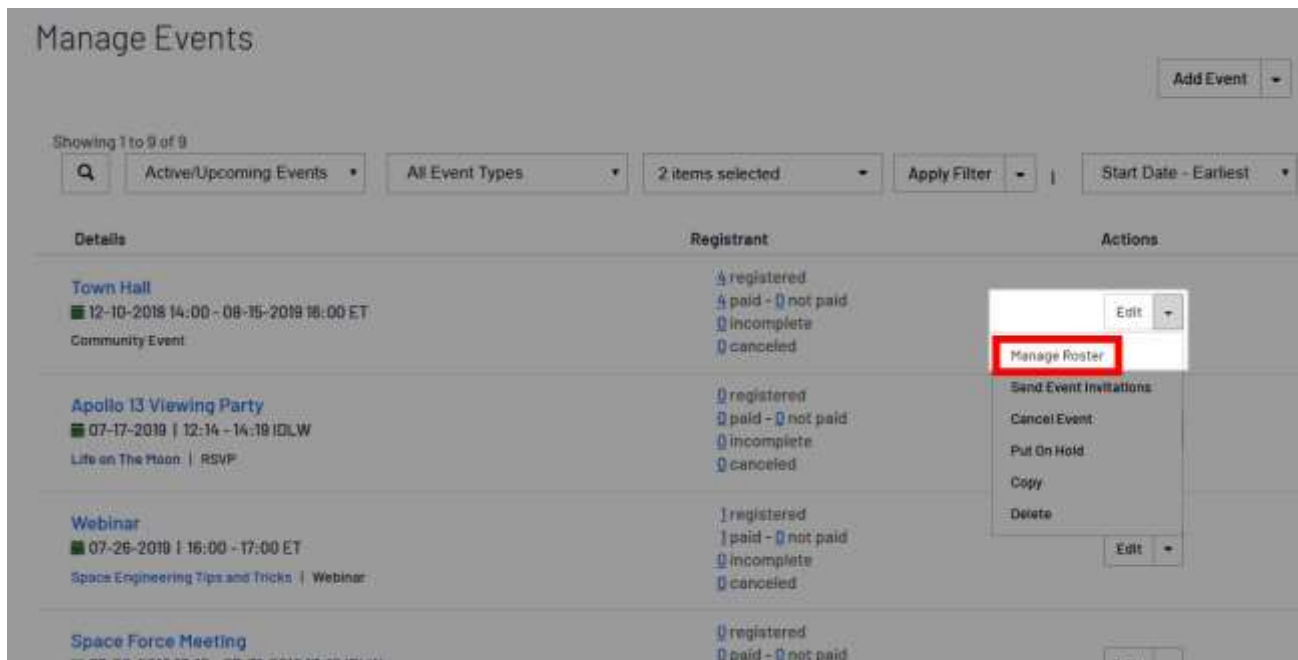
TIP: The Registrant Roster is also helpful for managing post-event registration details.

Access an event's Registrant Roster

1. To navigate to the chapter's Manage Events page, click on the Settings button in the upper right-hand corner of the chapter webpage and click on Manage Events.



2. Find the event you need to manage and click the down arrow for the Edit button associated with it and select Manage Roster.



Search and filter registrants

In the middle of the page, you can:

- Click the **magnifying glass** icon to expand a search field, allowing you to find specific users by first/last name and company affiliation.
- Use **filters** to make it easier to find specific registrants (e.g., all those who haven't paid, who have incomplete registrations, etc.). Filters include **Registration Status**, **Payment Status**, **Registrant Classes**, and various **alphabetized sorting options**.

The screenshot shows the 'Roster' page for a 'Town Hall' event. It includes an 'Event Payment Summary' box with the following data:

Total Due:	\$0.00
Total Received:	\$0.00
Refunded:	-\$0.00
Balance:	\$0.00

Below the summary are buttons for 'Email', 'Add Registrant', and 'Export'. A search bar is present with a magnifying glass icon and a 'Clear' button. Filter dropdowns are set to 'All Registrations', 'All Payment Statuses', 'All Registrant Classes', and 'Last Name A-Z'. A table of registrants is shown below:

Registrant	Registration	Price / Payment	Actions	Attendance
Super Man Man Of Steel	Registered by Product Management 11/13/2018 8:40:24 AM Non-member	\$0.00 / \$0.00 ✓	Registration ▾	👍 👎
Product Management	Registered 11/12/2018 4:37:57 PM Former Speakers	\$0.00 / \$0.00 ✓	Registration ▾	👍 👎

Add registrants

Admins can easily add registrants directly from the Registrant Roster. This feature is especially useful if you're adding a speaker or sponsor, retroactively adding someone for tracking purposes or adding someone who unexpectedly attended an event without registering.

To add a registrant(s), click **Manage > Add Registrants**.

The screenshot shows the 'Manage Roster' page. It includes the same 'Event Payment Summary' box as the previous screenshot. Below it are buttons for 'Email', 'Manage', and 'Export'. The 'Manage' button is highlighted, and a dropdown menu is open, showing 'Add Registrants' as the selected option. The search and filter dropdowns are also visible at the bottom.

A dialog displays where you can add registrants in the following ways:

Add specific users

Select **Specific contacts** from the menu. In the **Registrant's Name** field, begin typing their name, and then select them from the auto-populated list of suggestions. You can repeat this process to add multiple people.

With the desired user(s) selected, click **Add** to register them.


Create Contact ×

Register

Specific contacts ▾

Registrant's Name

Ryan Casey × kat

 Kate Zimmerman - HigherLogic - US

Attendance

Mark registrants as attended

CANCEL ADD

TIP: If you're retroactively adding someone for tracking purposes or adding someone who unexpectedly attended an event without registering, check the **Mark registrants as attended** box to mark them as attended in the system.

Add community members

In the **Register** menu, your chapter community is listed. Select the community to view all of its members.

- Check individual boxes to select one or more members.
- Check the **Select and register all community members for this event** box above the list to select ALL members of the community at once.

Once selected, click **Add** to register them.

Register:

Command Central

 Select and register all community members for this event.

	Name	Email Address	Company
<input type="checkbox"/>	Alex "Han" Gorton		HigherLogic
<input checked="" type="checkbox"/>	Calle Lillis		HigherLogic
<input checked="" type="checkbox"/>	Cathy Poon		test
<input checked="" type="checkbox"/>	Chris Scavo		HigherLogic
<input type="checkbox"/>	Edward Ed English		HigherLogic
<input type="checkbox"/>	Flower Workman		HigherLogic

Showing 1 to 15 of 15

Attendance

 Mark registrants as attended

CANCEL

ADD

TIP: If you're retroactively adding someone for tracking purposes or adding someone who unexpectedly attended an event without registering, check the **Mark registrants as attended** box to mark them as attended in the system.

Create new contact and add them

If the attendee isn't currently in the system, you can even create a record for them right from here. Select **New Contact** from the **Register** menu, and then fill out their details in the listed fields.

Click **Add** to register them.

Register

New Contact

Email Address

First Name

Last Name

Company Name

Attendance

 Mark registrants as attended

CANCEL

ADD

TIP: If you're retroactively adding someone for tracking purposes or adding someone who unexpectedly attended an event without registering, check the **Mark registrants as attended** box to mark them as attended in the system.

The registrant(s) will receive an email confirmation of their completed registration, along with the event's details for their records. The registrant(s) can view their registration online via their **My Registration**'s event itinerary.

NOTE: If the event in question involves money: By default, registrants added this way are considered complete but not paid; however, if the user has paid on-site, an admin can mark the user as paid via the itinerary.

Email Registrants

Admins can quickly send out an email to **all** or **specific** registrants before, during, and after the event, right from the Registrant Roster. Just select the desired filters and click **Email**.

Email all registrants

To email everyone, simply leave the default filters in place, which lists *all* event attendees.

Registrant	Registration	Price / Payment	Actions	Attendance
Niluka Bamunuarachchige HL	Registered 1/5/2019 3:44:12 PM All Registrants	\$0.10 / \$0.00	Registration	Attendance
Ejors Dale nordic	Registered by Niluka K 10/6/2017 3:32:07 PM All Registrants	\$0.10 / \$0.10 ✓	Registration	Attendance
Ben Johnson	Registered by Niluka Bamunuarachchige 1/9/2019 3:45:00 PM All Registrants	\$0.10 / \$0.00	Registration	Attendance
Catherine Poon	Incomplete 10/18/2017 11:46:34 AM All Registrants	n/a	Registration	Attendance
En Sato	Registered 11/8/2016 6:50:02 PM All Registrants	\$0.10 / \$0.00	Registration	Attendance
Nathan Wallin Higher Logic	Registered 12/6/2017 9:37:40 AM All Registrants	\$0.10 / \$0.10 ✓	Registration	Attendance

Email specific registrants

For example, you can send an email to users who have completed their registration but have not paid:

Registrant	Registration	Price / Payment	Actions	Attendance
Niluka Bamunuarachchige HL	Registered 1/9/2019 3:44:12 PM All Registrants	\$0.10 / \$0.00	Registration	Attendance
Ben Johnson	Registered by Niluka Bamunuarachchige 1/9/2019 3:45:00 PM All Registrants	\$0.10 / \$0.00	Registration	Attendance
En Sato	Registered 11/8/2016 6:50:02 PM All Registrants	\$0.10 / \$0.00	Registration	Attendance

Or, you can send an email to users who have started to register for the event but have not completed registration:

Registrant	Registration	Price / Payment	Actions	Attendance
Catherine Poon	Incomplete 10/18/2017 11:46:34 AM All Registrants	n/a	Registration	Attendance