Setting up a new trip on Range Rover Club Website

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The main way to set up a new trip is to "Duplicate" the "Trip Template" and change it accordingly.

The info below is to help you if things go wrong and/or if the template gets screwed.

Editing notes:
Edit & View modes

The system is a bit funny to get used to. Some of the trip is built in "Edit" mode, and some in "View" mode (i.e. not in Edit mode). To move between the two modes:

- You automatically start in *"View mode"*
- Select Edit to enter *"Edit mode"*
- To return to *"View mode"*, select the Save button

Formatting in this document.

Style format used here is **Bold** is a section title and *italics* is the thing you click or fill in.

Set-up check List
1. Duplicate the Trip Template
2. Edit Title, Tags, Location, Date & Description
3. Ensure formatting has been cleared in the Description
4. In Registration, only Names, Email, Mobile, Vehicle & Partners name are required.
5. Custom registration fields exist
6. Trip limit is correct
7. Multiple registrations
8. Enable waitlist
9. Only one registration Type required – Click on "Full Member" or the Type to edit this
    a. Guests NOT allowed
    b. Ensure Life, Senior & Standard Memberships only selected.
10. Set the emails to be sent to both the trip leader and the copy emails box is checked
11. Make the trip visible to everyone
12. Make sure the trip is enabled (remember to go to Edit mode)

- Most of these items are edited in "Edit Mode" (i.e. Select the "Edit" button.)
- editing the Registration types is done from the "view mode"

1 - Duplicate the Template

In the Trips list find **"**** Trip Template ****"** & hit the "Duplicate" button.

Note: If you're reading this and the trip title doesn't have "(Copy)" in the title then you're viewing the template, not the new trip. The Edit button has a little arrow - click the arrow and select "*Edit Duplicate*"

If you're reading this and see the Save & Cancel buttons, but not the word "(Copy)" in the title, then you're editing the template, not the trip. Press cancel and then "Duplicate" this trip and start again.

Note! If you duplicate and tweak the template, most of the set-up is done for you. However, it's a good idea to follow these steps for the first few trips.
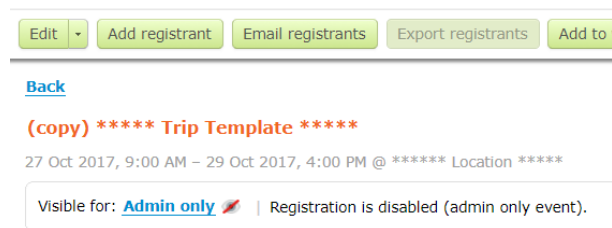
2 – Edit the template
==== Page 1 - Basic Information & Description ====

Visible For

The default is *Admin Only* leave it like that until the trip is set up. There should be a message saying that the Registration is disabled.

--- Click Edit ----

Description (this box)

We use the default font. so the website is consistent. So, to edit the Description either:

- Manually replace or tweak the content below, or
- Copy and paste content from elsewhere. You will need to "*Clear the formatting*" then add Headings, bold, italics as appropriate. The option is in the toolbar above - possibly hidden under "more"

You may need to "*Clear Formatting*" if you see different font sizes or types.
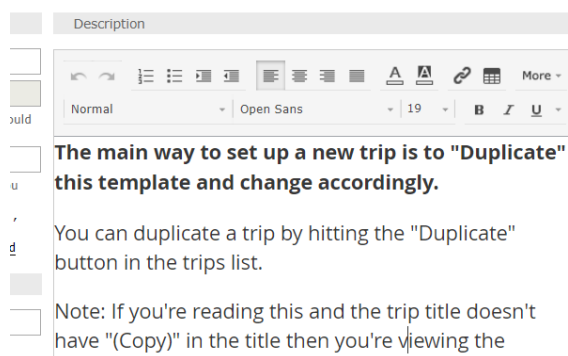
Additional event information to be inserted in registration confirmation email

Add whatever you need to this box at the bottom of the page

Basic Information

- Add *Title, Tags, Location & Date(s)*
- Select "*Show registrants who want to be listed*" & click "*to members only*"
- Make sure "*Do not add new guests to contacts list*" is ticked

Event details   Registration form   Registration types & settings   Emails   Regi

* **Mandatory** fields

Basic information

Title (copy) ***** Trip Template *****

Event URL https://rrcv.wildapricot.org/event-2686683

Copy and share this link. This is where potential attendees should register for event.

Tags club trip

Type or click on existing tag below. Separate with commas. You can use spaces within tags.
basecamp , club trip , committee meeting , dargo , day trip , driver training , events , highcountry , monthly members meeting , outback trip , overnight(s) trip , victoria , weekend competition

When and where

Location ****** Location *****

Time zone ☑ Use default organization settings
(UTC+10:00) Canberra, Melbourne, Sydney

Start date 27 Oct 2017   Time   09:00 AM

End date 29 Oct 2017   End time   04:00 PM

Add sessions   Add repeating sessions

List of event registrants

☑ Show registrants who want to be listed
  ○ to everyone
  ● to members only
☐ Include pending registrations

Guest registration

● Do not add new guests to contacts list
○ Add new guests to contacts list only if email entered
○ Add all new guests to contacts list

==== Page 2 Registration Form ====

Default Registration form lists all common fields:

Uncheck all but *Name, Email, Mobile, Vehicle & Partner's name*.

Make sure the club's custom fields are there: *Comments, Guest count, Temp Membership form & pay for your guests*.

==== Page 3 Registration types & settings ====

Registration settings

- **Limit** the registrations to the Trip Leader's preference
- Enable **waitlist** and capture "*All event registration info*"

Note that the Registration Types are greyed out whilst in "Edit mode"

Registration types - are managed in "View" mode

--- **Click SAVE - to exit "Edit" mode & add/edit Registration types----**

Once in "View mode" you will see the Registration Types can be clicked.

We just need one type - call it "*Member*"

- In the **Description**, leave blank or write a message
- Don't set the **Limit**
- Check the box the "*Disable multiple registration*"
- We don't do guests. So make sure "allow guest registraions" is unchecked
- ONLY allow
  - Life Membership
  - Life Membership - Partner
  - Senior Membership
  - Standard Membership

There are other membership types that don't get to register for trips.

Back

Event registration type for (copy) ***** Trip Template *****
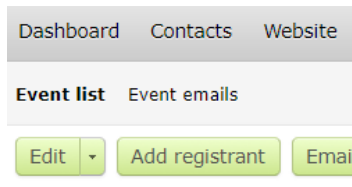27 Oct 2017, 9:00 AM – 29 Oct 2017, 4:00 PM @ ***** Location *****

Registration type

Status	Enabled
Name	Full member
Description	
Base price	$0.00 (AUD)
Sold/Limit	0 (limit not set)
Taxes	Disabled
Multiple registrations	Disable multiple registrations for the same contact
Guest registrations	Not allowed
Availability	Members only
	✔ Life Membership
	✔ Life Membership - Partner
	✔ Senior Membership
	✔ Standard Membership
Available period	Always
Display options	Show with special formatting if unavailable

==== Page 4 Emails ====

--- Click Edit to go back into "Edit mode"----

Click *"Edit"*

In "**Event organizer**", click "*change*", then search for and select the trip leader.

Make sure that there is a "tick" in the "*Copy emails according to email routing settings*" option.

Setting the (Auto) **Reminders** both ensures people don't double book and reminds them to sort out Temporary Membership forms. Different trips will have different requirements for reminder.

- Set Reminder 1 to *3-4 weeks before the event*
- Set Reminder 3 to *15 days before the event*
- Set Reminder 3 to *3-4 days before the event*

Registration emails

Make sure all six boxes are ticked

==== Click Save on the top left of the page ====

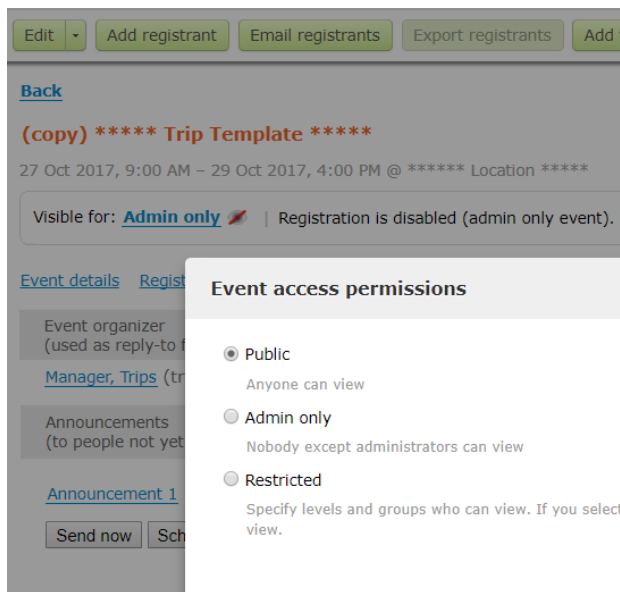And you're done!!

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2 – Publish

 ==== Once completed ====

On any page, in **Visible for:** - Click "*Admin Only*" and select "*Public*". This is only the visibility of the trip, the option to restrict who signs up was set at **Registration Types**.

Also put a tick in the *Enable registration option.*

In **Emails / Announcements** - leave 1 & 3 blank but you can schedule Announcement 2 for, a suitable period before the event. It says that there are still spaces and invited registrations.

Once the trip completed and saved, you can "*Send Now*" announcements, as required.

- 1 = A trip is now available
- 2 = Still spaces left
- 3 = The trip has been reopened