



# CRM/CMS Tutorial

## Creating an Event

From the **HOME** page, click the **EVENTS** button.

The screenshot shows the 'User Home' interface. At the top, there's a navigation bar with icons for HOME, CMS, DOCUMENTS, and EMAIL TEMPLATES. Below this, a main menu contains buttons for 'CREATE A NEW EVENT', 'EVENTS', 'REGISTRATIONS', and 'INVOICES'. The 'EVENTS' button is highlighted with a red box.

At the top of the page, you have the option of searching your events. This is helpful if you have many events.

To create a new event, click the **CREATE A NEW EVENT** button.

You also have the option of checking registrations and editing an event.

The screenshot shows the 'Search Events' interface. At the top, there's a navigation bar with icons for HOME, CMS, DOCUMENTS, and EMAIL TEMPLATES. Below this, a search form is visible with fields for 'Event Title', 'Category', 'Active', 'Registrations allowed', and 'Finished'. Below the form are buttons for 'SEARCH', 'PRINT', and 'CLEAR FORM'. A list of events is shown below, with the first event highlighted. The 'CREATE A NEW EVENT' button and the 'Registrations Edit' link are highlighted with red boxes.

23 Events found, displaying all Events. « < 1 > »

**CREATE A NEW EVENT**

**Event:** Edmonton Study Group - Spring 2018 Session  
**When:** May 03, 2018 06:00 Pm – May 03, 2018 09:30 Pm  
**Location:** Alberta Construction Safety Association - Edmonton Facility  
225 Parsons Rd SW  
Edmonton, Alberta T6X 0W6  
Canada

**Registrations Edit**

This is the default page for **CREATE A NEW EVENT**.

The screenshot shows the 'CREATE NEW EVENT' form in the in1 touch system. The header includes the in1 touch logo, the title 'Create New Event', and system information: 'Local: Tuesday | February 11, 2020 12:54:30' and 'Server: Tuesday | February 11, 2020 11:54:30'. A user profile 'chapter test chapter test' is visible in the top right. The navigation bar contains 'HOME', 'CMS', 'DOCUMENTS', and 'EMAIL TEMPLATES'. The form fields are: 'Folder: Home', 'Name: \*' (empty), 'Language: English', 'Language: French', 'Custom URL:' (empty), 'Active' (unchecked), 'Finished' (unchecked), 'Client can be invoiced if credit card is not available' (unchecked), 'Event Link Color' (empty), 'Background Event Color' (empty), 'This is an example message' (text), 'Create Profiles' (unchecked), 'Allow registrations: Member or Guest Registrations', 'Reg. Type: Registration', and 'Maximum group size: 1'.

As an example, we'll create an event for Edmonton Chapter.

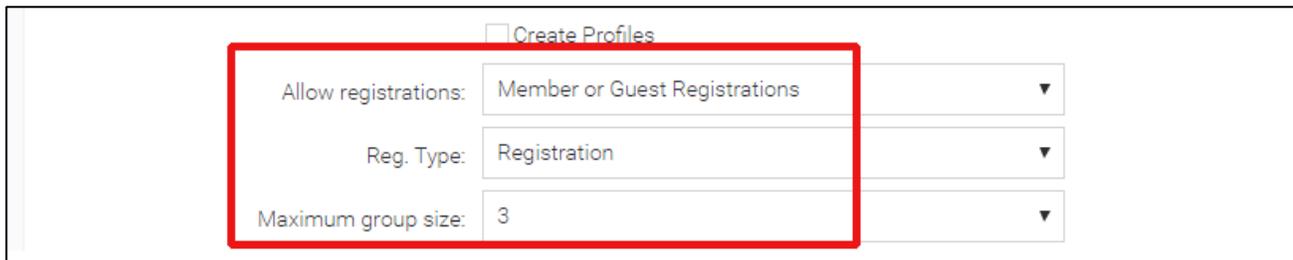
The screenshot shows the 'CREATE NEW EVENT' form with specific values entered and highlighted in red. The 'Folder' is 'Edmonton', 'Name' is 'Edmonton February 2021 Meeting', 'Language' is 'English', 'Language' is 'French', 'Custom URL:' is empty, 'Active' is checked, 'Finished' is unchecked, 'Client can be invoiced if credit card is not available' is unchecked, 'Event Link Color' is empty, and 'Background Event Color' is empty. A red arrow points to the 'Client can be invoiced if credit card is not available' checkbox with the text 'Select to allow paying later (ex: at the door)'.

**Folder:** Select the name of your Chapter (in this example, Edmonton)

**Name:** Something descriptive, as it will also show in the National calendar (*chapter name - date - event*).

**Active:** Select if you want your new event to be posted to the website immediately.

**Client can be invoiced if credit card is not available:** Select to allow invoicing.



Create Profiles

Allow registrations: Member or Guest Registrations

Reg. Type: Registration

Maximum group size: 3

Allow Registrations

**Member or Guest Registrations:** Allows Members logged-in and Non-Members not logged in to register.

**Member Registrations Only:** Allows only logged-in members to register (not usually selected).

**Guest Registrations Only:** Allows only Non-member registrations (not usually selected).

**Information Only (No Registrations):** You want to advertise an event with no registration on your website.

Registration Type

**Registration:** Information will be collected on each person attending the event.

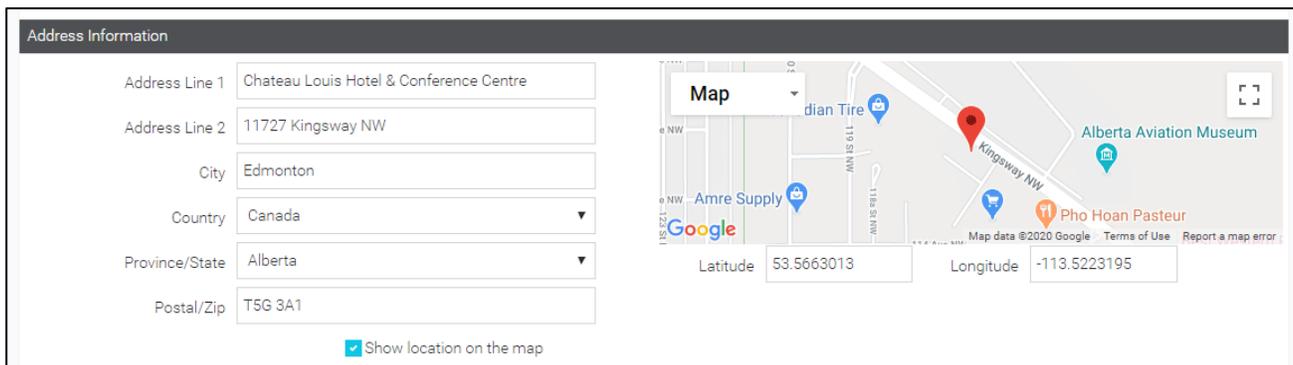
**Ticket:** Information is collected only on the one person completing the registration.

Maximum Group Size

This limits how many registrations can be filled out at one time. Option is 1-100, but 1-5 is most common.

NOTE: This is not where you set the event attendance limit.

Enter the address of your event and check **Show location on the map** to activate the Google Map.



Address Information

Address Line 1: Chateau Louis Hotel & Conference Centre

Address Line 2: 11727 Kingsway NW

City: Edmonton

Country: Canada

Province/State: Alberta

Postal/Zip: T5G 3A1

Show location on the map

Map

Latitude: 53.5663013

Longitude: -113.5223195

Enter event dates and times.

Registration starts: *	Registration ends: *	Cancellable until: *
02/10/2020 08:00	02/15/2021 15:00	02/10/2020 08:00
Event Start Date: *	Event End Date: *	Event Title:
02/16/2021 18:00	02/16/2021 20:00	Edmonton February 2021 Meeting
		English
		French

**Registration starts:** The day and time that members can start registering.

**Registration ends:** The day and time that members can no longer register.

**Cancellable until:** The day and time that members can cancel their registration. If you set to **Registration starts** date and time, members will not be able to cancel. They will have to contact the Chapter to cancel manually. This is preferable if a payment is involved since the payment processor and CSSE system are not linked.

**Event Start Date:** The day and time the event starts.

**Event End Date:** The day and time the event ends.

**NOTE:** The website server is in Winnipeg, Manitoba and on **Central Time**. Please take this into account for scheduling of eblasts and registration cut-off times.

Local: Tuesday | February 11, 2020 13:56:08  
Server: Tuesday | February 11, 2020 12:56:08

HOME CMS DOCUMENTS EMAIL TEMPLATES

CREATE NEW EVENT

Folder: | Edmonton

**Short Description:** This is what will appear in the member's invoice. It should be kept brief.

SHORT DESCRIPTION

Short Description: \* English French

Edmonton February 2021 Meeting  
February 16, 2021 / 6:00 pm - 8:00 pm  
Chateau Louis Hotel & Conference Centre  
11727 Kingsway NW, Edmonton

**Description:** This is where you put the full event description.

DESCRIPTION

Description: English French

Edit Insert Format Table

Format: Verdana 11pt Paragraph

We invite you to attend our February 2021 Chapter meeting.  
This is an excellent opportunity to connect with other members, hear updates on national initiatives, engage in conversation, and have your voice heard.

**Date:** February 16, 2021  
**Time:** / 6:00 pm - 8:00 pm  
**Location:** Chateau Louis Conference Centre | 11727 Kingsway NW  
**Speaker:** David Chan, Director, Office of Emergency Management, City of Edmonton  
**Cost:** No charge

Everyone is welcome and we hope to see you there!

Click **SAVE** to save your event.

Customise by adding Prices and Custom Fields below. Use "Add " button to add new fields, you can also setup rules for them.

Search for Edit Form:

Field Type	Field Name	Input Type	Bean / Sequence
		<input type="button" value="SAVE"/>	<input type="button" value="CANCEL"/>

Click **HOME** and then **EVENTS**. Your event will now show in the **Events** list.

**in1 touch** Search Events Local: Tuesday | February 11, 2020 15:13:58 Server: Tuesday | February 11, 2020 14:13:58 chapter test chapter test

HOME CMS DOCUMENTS EMAIL TEMPLATES

**SEARCH EVENTS**

Event Title:

Category:

Active:

Registrations allowed:

Finished:

SEARCH PRINT CLEAR FORM

24 Events found, displaying all Events. « ‹ 1 › »

CREATE A NEW EVENT

**Event:** Edmonton February 2021 Meeting  
**When:** February 16, 2021 06:00 Pm – February 16, 2021 08:00 Pm  
**Location:** Chateau Louis Hotel & Conference Centre  
11727 Kingsway NW  
Edmonton, Alberta T5G 3A1  
Canada

[Registrations](#) [Edit](#)