EVENTS REGISTRATION

A WORDPRESS PLUGIN

Quick Reference Guide

For

Events Registration v. 5.0

WordPress

Thanks for choosing the Events Registration for Wordpress. This project has come along way since I first started with version 1.0.

I originally tried to find a plugin to suit my needs to have a quick and efficient way to provide online registrations for the various events an organization may have or sponsor. After an exhaustive search through available plugins, I could not find a simple solution. With most online services charge $1.00 per registered person plus a % of the fee, this can get expensive quickly, thus the need for my plugin.

Thanks to your comments and contributions I have been able to keep this project going and continue to improve and make changes. Please continue both.

This guide will help you get started. I have tried to make the application as intuitive as possible, but have found that its not always the case.

In this version I have added a button to create samples for you to get you off and running. Just click the samples tab and you should be off.

It is important and necessary that you complete the organization configuration page first, as this information is critical for the proper operation of the registration process and payment process.

You do not have to take online payments, as there is a feature to support checks/cash.

The payment management system is a manual system and will require you to post payments manually. For those of you who are programming savy, I have included reference points to drop your IPN processing scripts.

Events are displayed based upon starting date. Once an event's start date is passed, the event will no longer be displayed in the Events list, but can be accessed in the admin panel.

Events can be copied with the click of a single button to handle yearly events with ease.

Registration data has a couple of standard fields that are required and some that are optional. Additionally you can create your own questions and response options to add to the form in an easy fashion.

That's all. There are many features that I did not list, but you will find and discover. Please take a moment and provide me your feedback and of course if you like it and find it useful, please donate.

Thanks.

David

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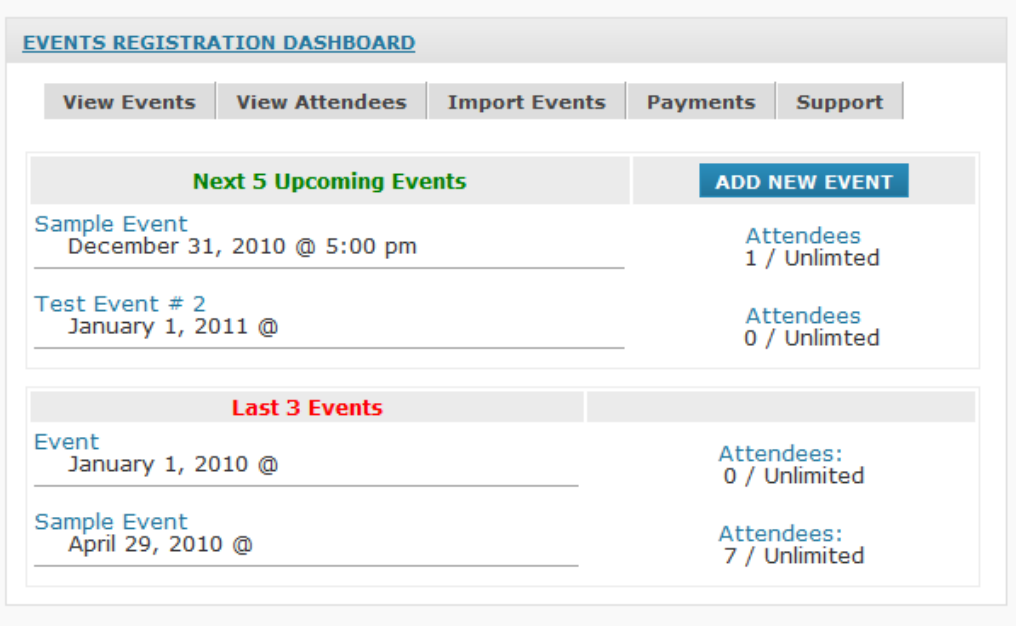
Navigating the Admin Panel

The Dashboard

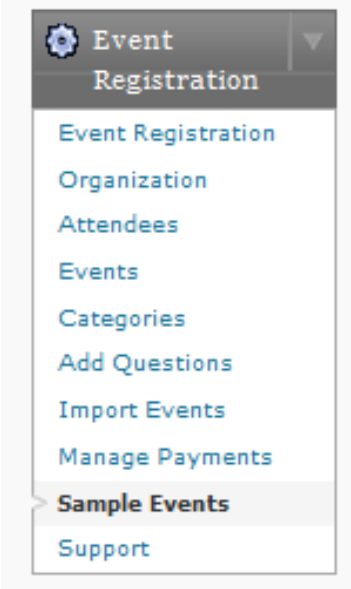
Upon activation, You will see the Event Registration Dashboard in your website's Wordpress Dashboard. The title is a quick link to the plugin as well as some of the most popular choices are available on the menu bar.

The Dashboard displays the next five upcoming events. Each event name is a link to the Event Setup Page view/edit the event details. The start date and time of the event is displayed as well. The attendee count for the event is displayed to the right of the Event Listing. The word Attendees is a link to the full list of attendees where you can view/edit/delete or download the list and attendee information.

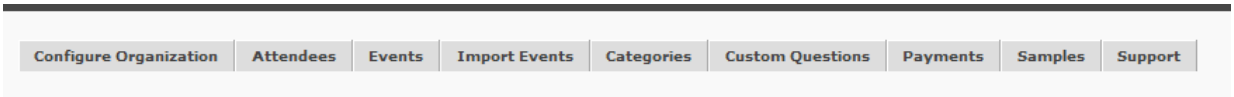
The Dashboard also displays the information from the three most recent events. . Each event name is a link to the Event Setup Page view/copy/edit the event details. The start date and time of the event is displayed as well. The attendee count for the event is displayed to the right of the Event Listing. The word Attendees is a link to the full list of attendees where you can view/edit/delete or download the list and attendee information.



Plugin Side Menu



Plugin Navigation Bar

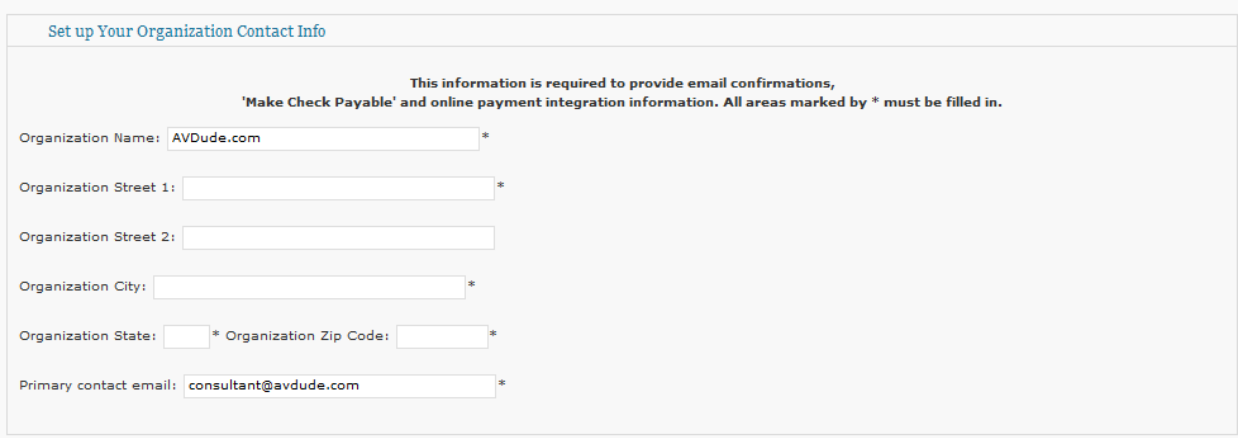


Configuring The Organization

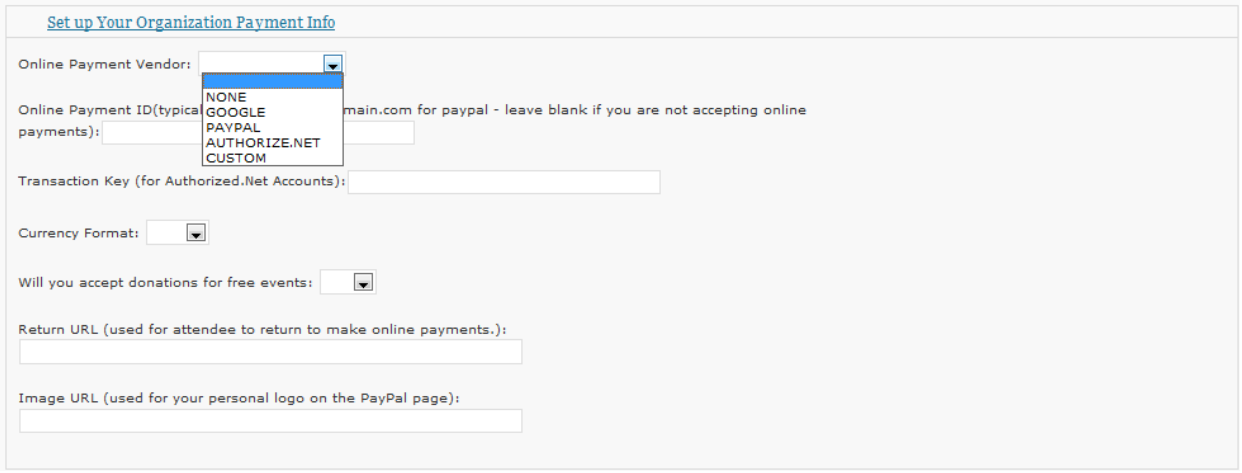
Before you can successful use the plugin it is necessary to complete the information in the Organization Setup.

This area is divided into three sections: Contact Information (all required fields), Payment Information, and Plugin Defaults.

The Setup Your Organization is fairly straight forward and by default uses your wordpress ‘s Admin name and email as the system default. You can change that when you enter your address information.



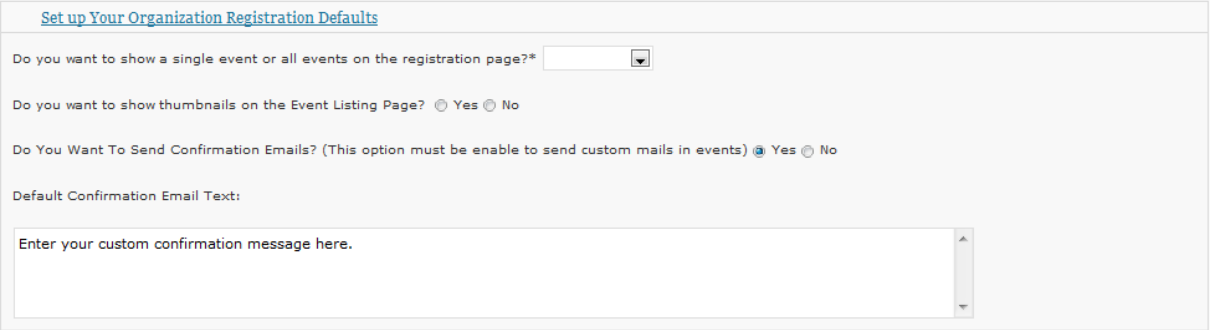
The Payment Information sections defines how your registration system will handle attendee payments. The plugin supports online payments through Paypal, Google Pay, Authorize.net and has future capability for easily adding a custom payment solution. If you currently do not wish to accept online payments, you can choose None.



If you choose to utilize online payments, your online payment ID will the your account indentifier with your online company. For Paypal this is typically your email address. For Google, this is a unique ID number. For Authorize.net, you will need your ID number her and an additional transaction key (leave blank for all other payment forms)

If you are accepting online payments there is also an option to accept donations for free events. If you check this, instead of a payment option, they will be given a donation option after registration.

During the registration process, sometimes people do not complete the payment and will need to return at a later date. In order to allow them to return, retrieve their payment info and pay, you will need to provide a return URL. To do this, simply create a new page on your site and place {EVENTREGPAY} in the body section, in HTML view. Then paste the link to this page in the return URL form on the Organization Page. This will allow the link with a unique key to allow an attendee to return and see their information and make a payment. They can also return and see their payments made, provide you post the payments in the system.



The third section is the Registration Defaults. For those of you who have used the system from the early days, you can chose to only show one event, the active event. This is legacy and is no longer needed because of the incorporation of categories, but is still present for legacy support.

On the event listing page, you can show thumbnail images of a logo or other picture to add a splash of color to your listing. To enable this feature, check yes. A really cool use of this is to use animated gifs for the images.

The plugin can automatically send confirmation emails to people when they register. You can select to send or not send emails by each event, but in order to do this, you must enable the feature here for global control. This uses the builtin wordpress send mail feature, so if you wordpress does not currently send mails, it will not work. As a side note, the emails sent might show a sent from similar to wordpress@yourdomain.com. The email thing is a default Wordpress thing, not related to my plugin. There is a great little plugin that resolves that issue. http://wordpress.org/extend/plugins/mail-from/

I recommend you create a default email that will be sent in case you forget to type a custom mail on your event. One of the nice features is that you can pull registration information and include it in the

email. Currently the plugin supports the following tags: [fname], [lname], [phone], [event],[description], [cost], [company], [co_add1], [co_add2], [co_city],[co_state], [co_zip],[contact], [payment_url], [start_date], [start_time], [end_date], [end_time]

A sample email would look like this:

This is an automated response - Do Not Reply

Thank you [fname] [lname] for registering for [event].

We hope that you will find this event both informative and enjoyable.

Should have any questions, please contact [contact].

If you have not done so already, please submit your payment in the amount of [cost].

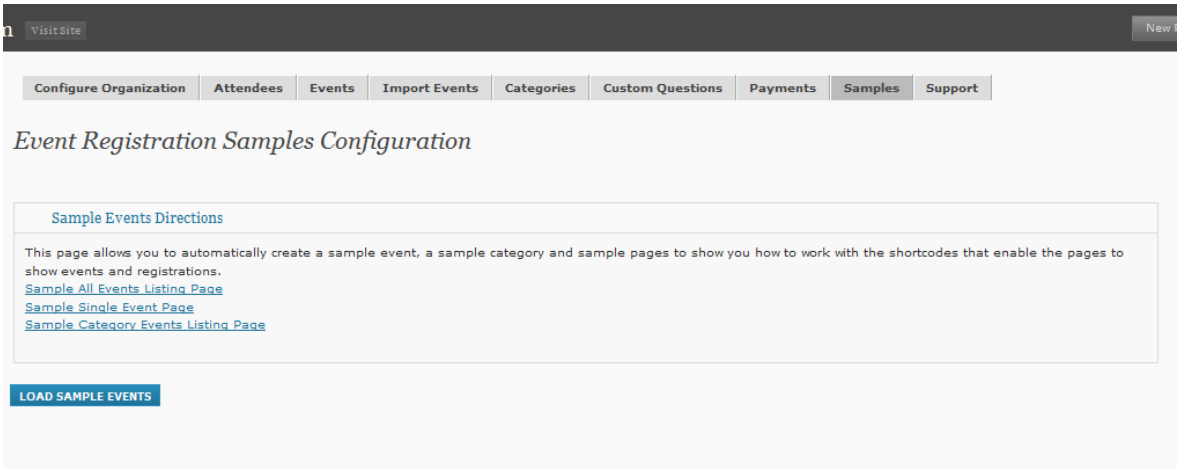
Click here to reveiw your payment information [payment_url].

Thank You.

That should complete the organization settings and now you are ready to get going.

Loading The Samples

As intuitive a programmer as I like to think I am, Im not. So to help you get started I added a feature that will create several pages on your site with the default shortcodes as well as load a sample category and a sample event. The sample event is not filled out in full, but is sufficient for you to understand the workings of the system.



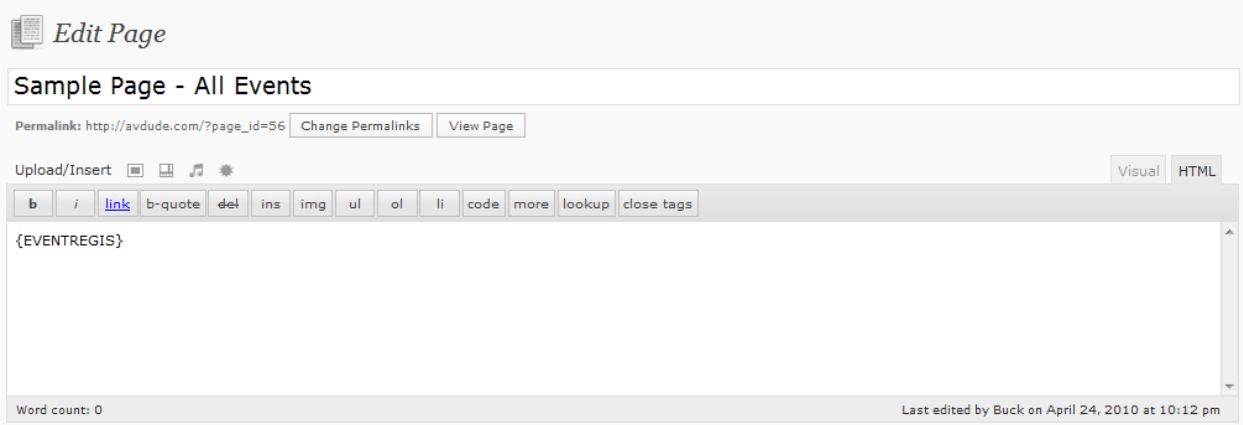
Once you click the blue “Load Sample Events” the plugin will create a few pages and the event. When it is complete you will see the links as displayed above. Click on them and check it out. That should help speed you along.

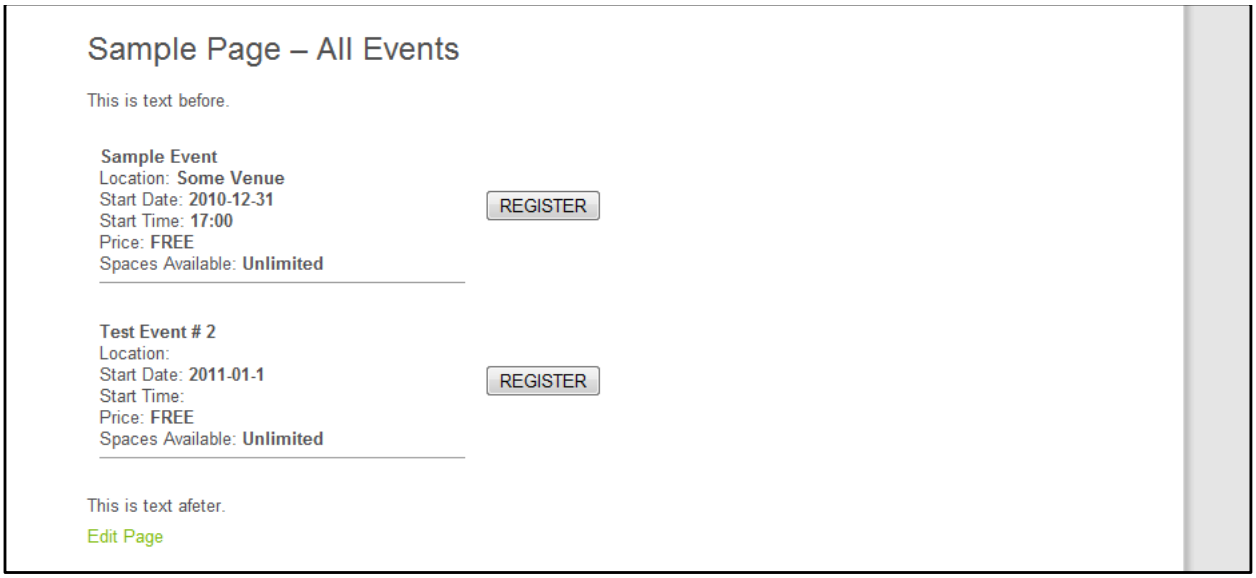
Looking At the Pages

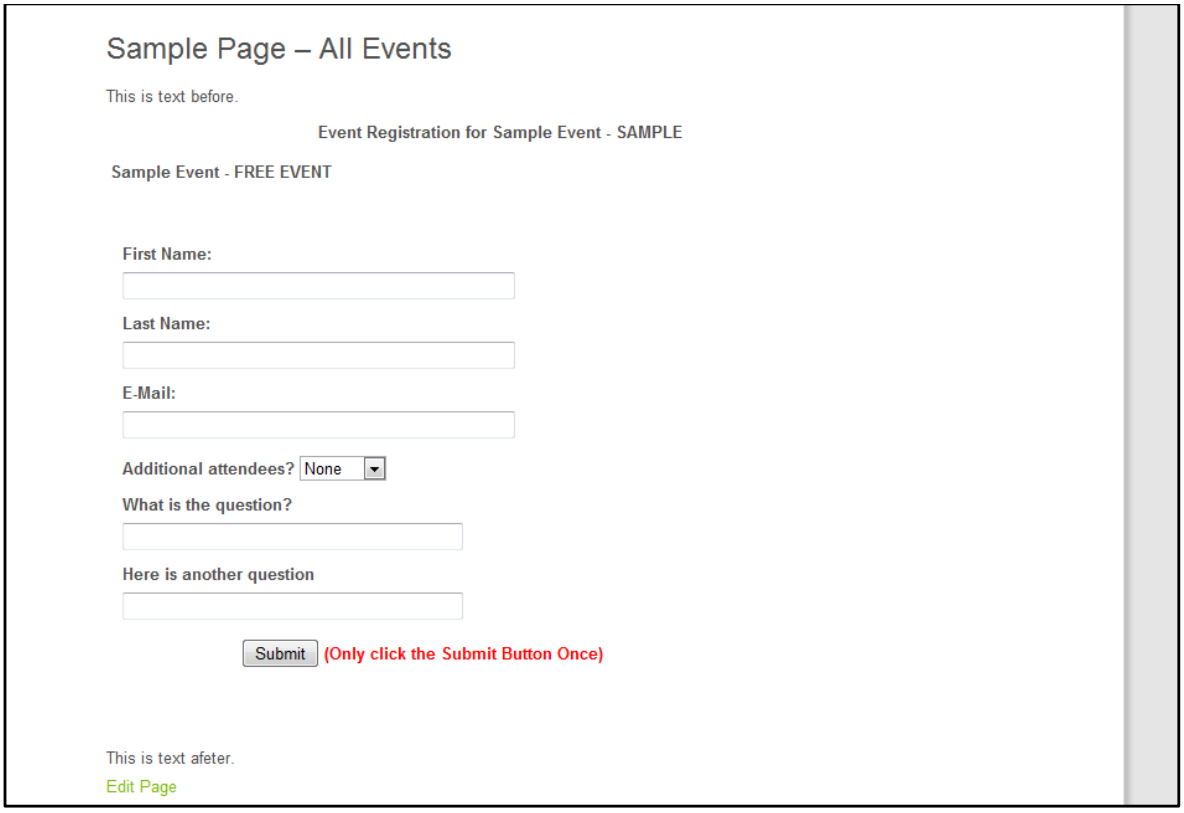
I have loaded screenshots of the plugin on my support side at
http://edgetechweb.com/eventsregistrationplugin/

Page Shortcodes

{EVENTREGIS} - Code to use for listing all events with register button. This is the main code that the plugin runs on. Placing this code on the page in HTML view, you wish to display the event listing/registration form. Note that you can enter text above and below the {EVENTREGIS}, but that text will be displayed throughout the registration process as this function merely replaces {EVENTREGIS} with the event listing, then the form, then the payment data, while staying on the same page.




Sample Page – All Events
This is text before.
Sample Event
Location: Some Venue
Start Date: 2010-12-31
Start Time: 17:00
Price: FREE
Spaces Available: Unlimited
REGISTER
Test Event # 2
Location:
Start Date: 2011-01-1
Start Time:
Price: FREE
Spaces Available: Unlimited
REGISTER
This is text afeter.
Edit Page


Sample Page – All Events
This is text before.
Event Registration for Sample Event - SAMPLE
Sample Event - FREE EVENT
First Name:
Last Name:
E-Mail:
Additional attendees? None
What is the question?
Here is another question
Submit
(Only click the Submit Button Once)
This is text afeter.
Edit Page

Sample Page – All Events

This is text before.

Your Registration has been added. Please watch your email for a confirmation of registration.

Thank You Somebody Lasting for registering for Sample Event.

This is a free event, however we gladly accpet donations to continue to offer such events in the future.

Your can donate online with a credit card through GOOGLE

The process is safe, simple, and secure and your bank or debit card information is used by Google for the sole purpose of processing this transaction and never shared with us. To start, enter your donation amount below and click on the Donate button. You will be forwarded to Google's secure website where you will enter your information and complete the transaction.

Enter Amount $ 10.00

Buy Now

Google Checkout

This is text afeter.

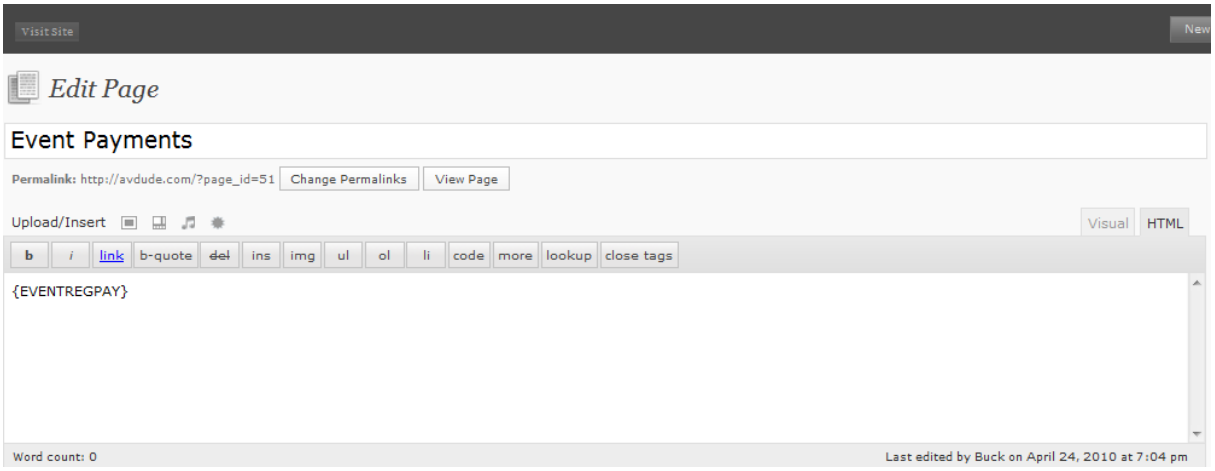
Edit Page

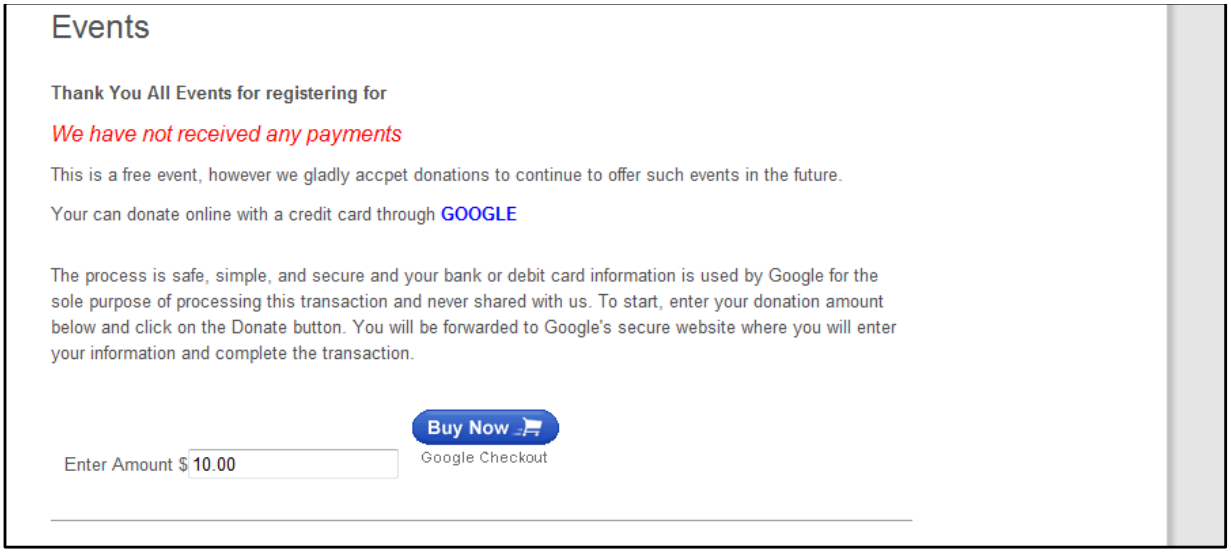
{ER_WIDGET} - Code to use in sidebar for event listing widget.

{EVENTREGPAY} - Code to use when setting up a return url for attendees to return and make payments. Occasionally attendees will exit the registration process without making a payment or you will allow partial payments and attendees will need to return the registration process to complete payment. Placing this code in a page and then using that pages URL as the return payment link in the Organization setup will allow attendees to return to make payments or can be used to allow online donations.

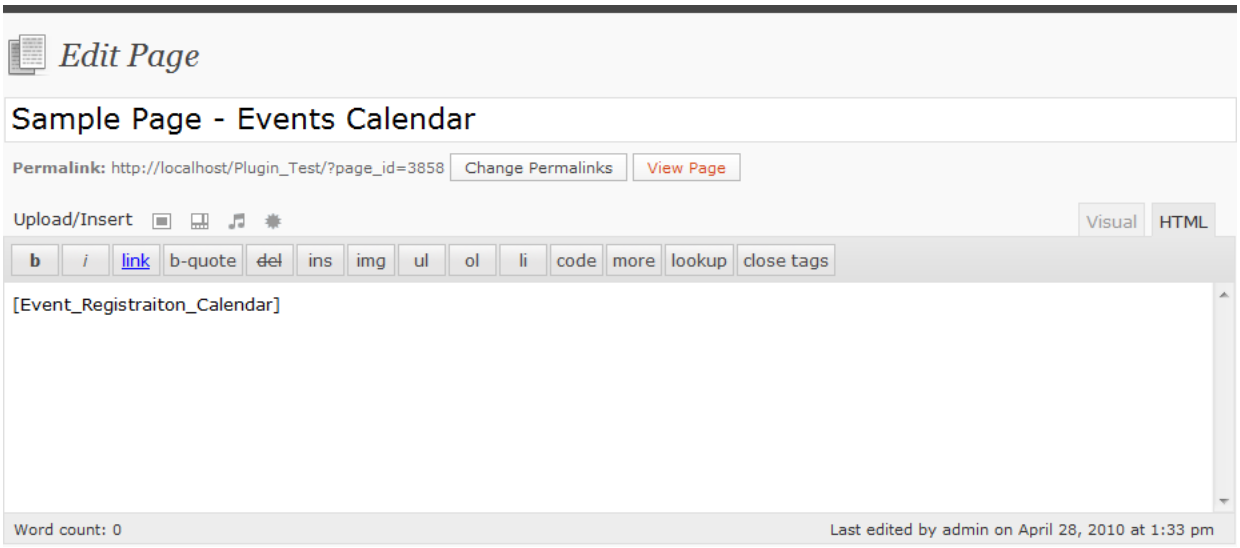
The page alone will display "Please check your email for payment information."

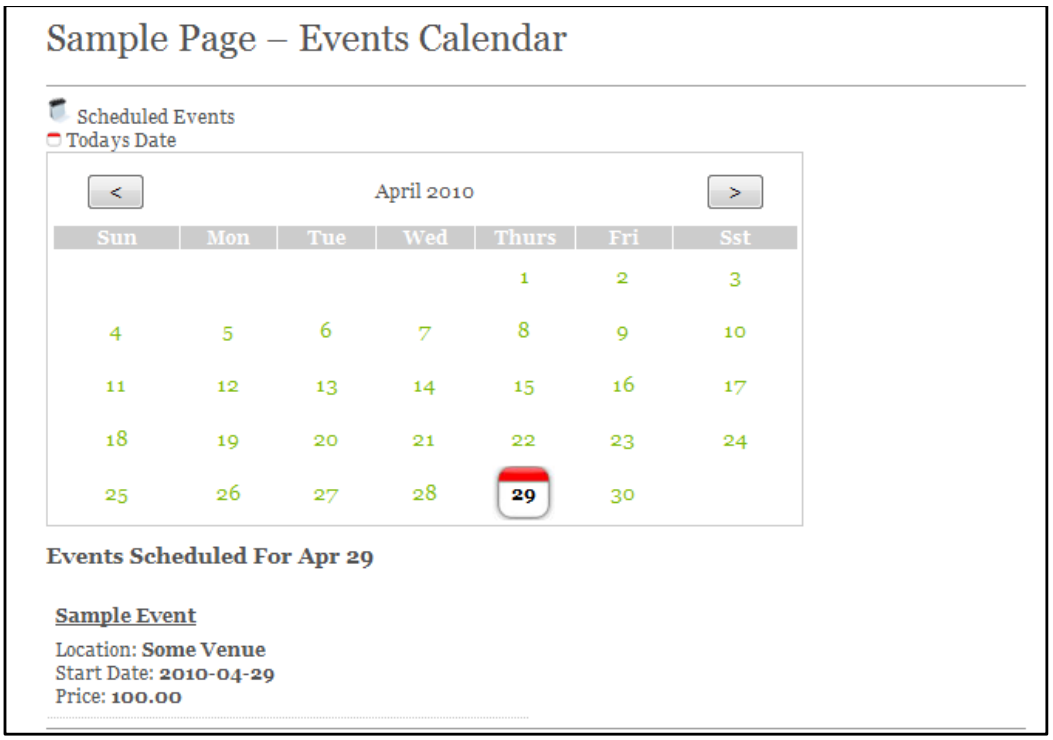
However, when the URL is sent to the attendee it will include the attendee's unique registration ID for that event in the URL, allowing his/her information to be displayed.



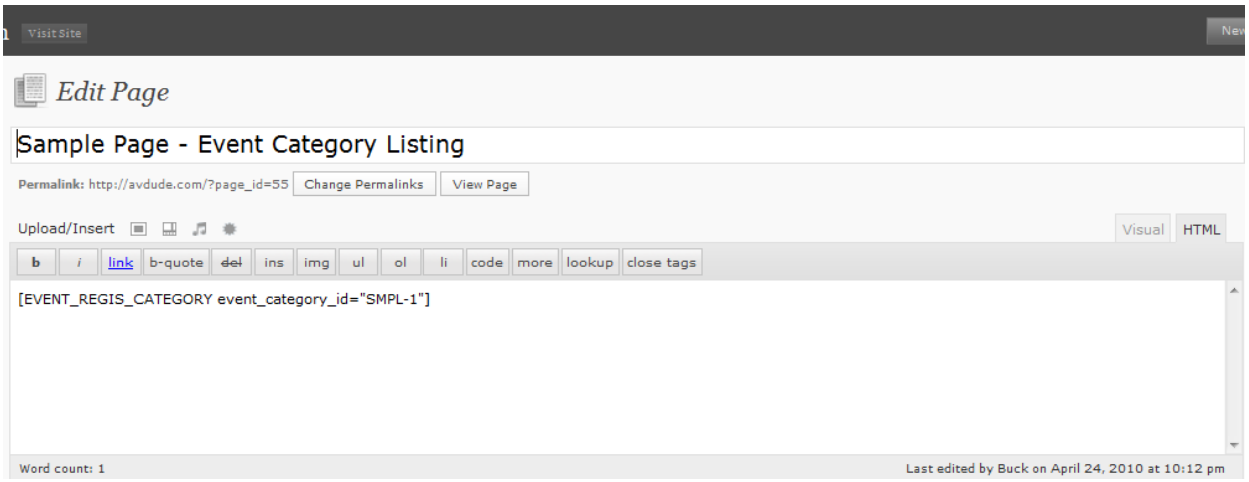


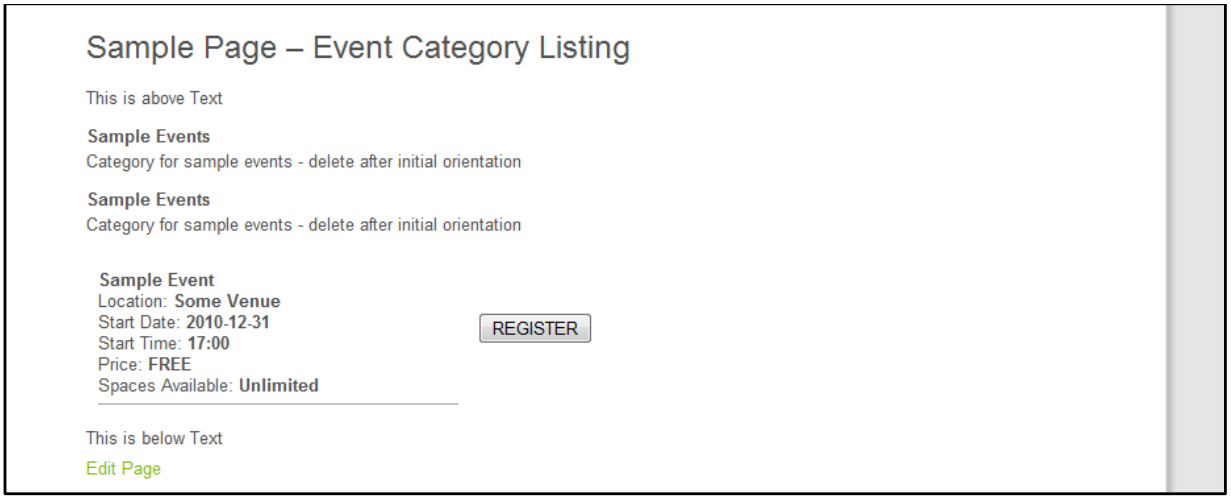
[Event_Registraiton_Calendar] - Shortcode for showing the Events Calendar. This shortcode displays a calendar and will provide a listing of events when the day an event is clicked. Event dates are marked by a calendar icon on the day the event is scheduled to start.



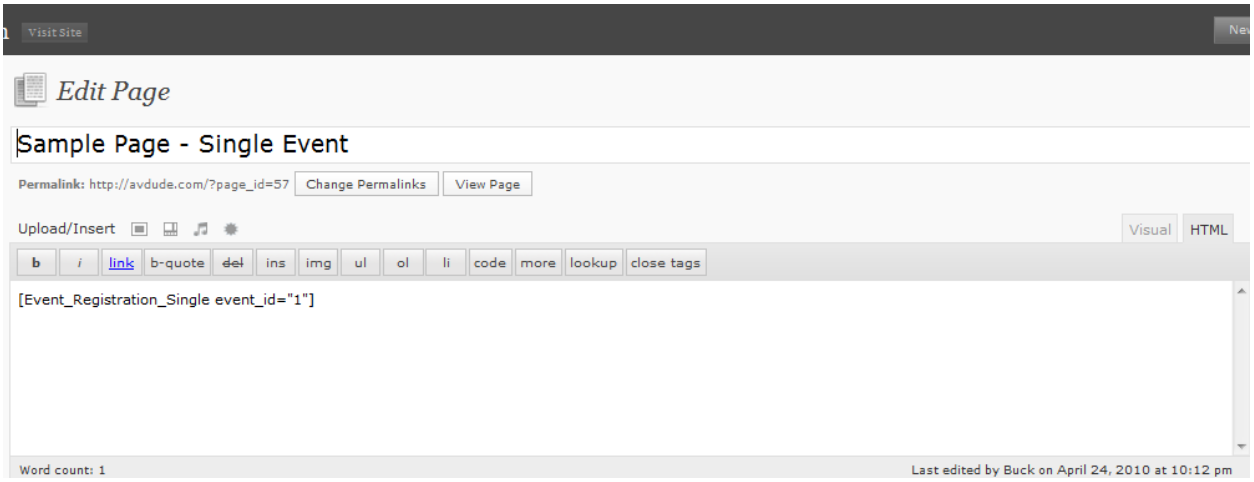


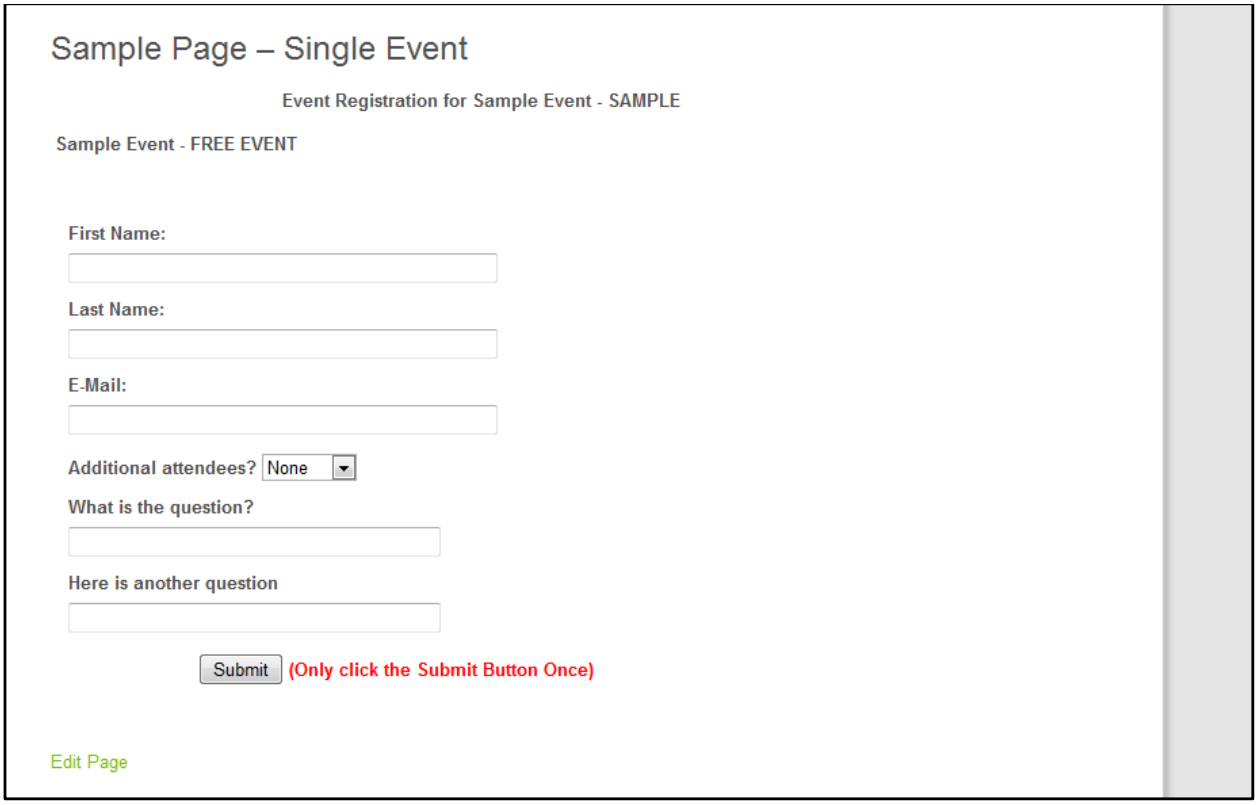
[EVENT_REGIS_CATEGORY event_category_id="???"] - Shortcode for showing a list of events by category. Replace ?? with the id # of the category. Actual shortcode is shown on each Event setup page and on the Category setup page. Placing this code on the page in HTML view, where you wish to display the event listing by the specific category. Note that you can enter text above and below the shortcode. That text will be displayed throughout the registration process as this function merely replaces the shortcode with the event listing, then the form, then the payment data, while staying on the same page.



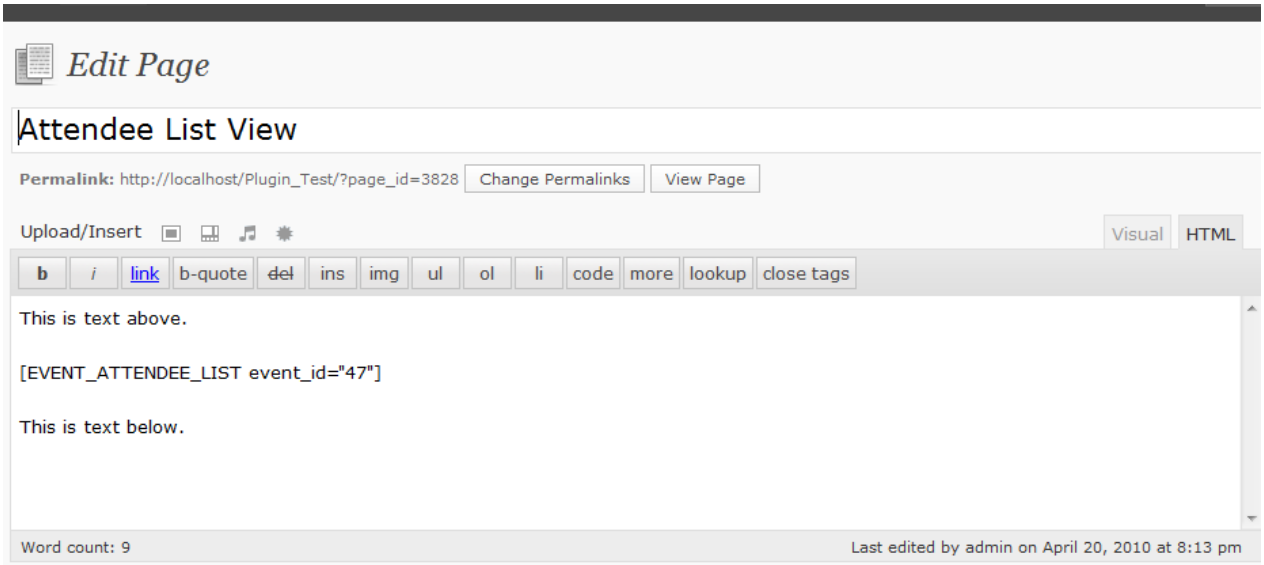


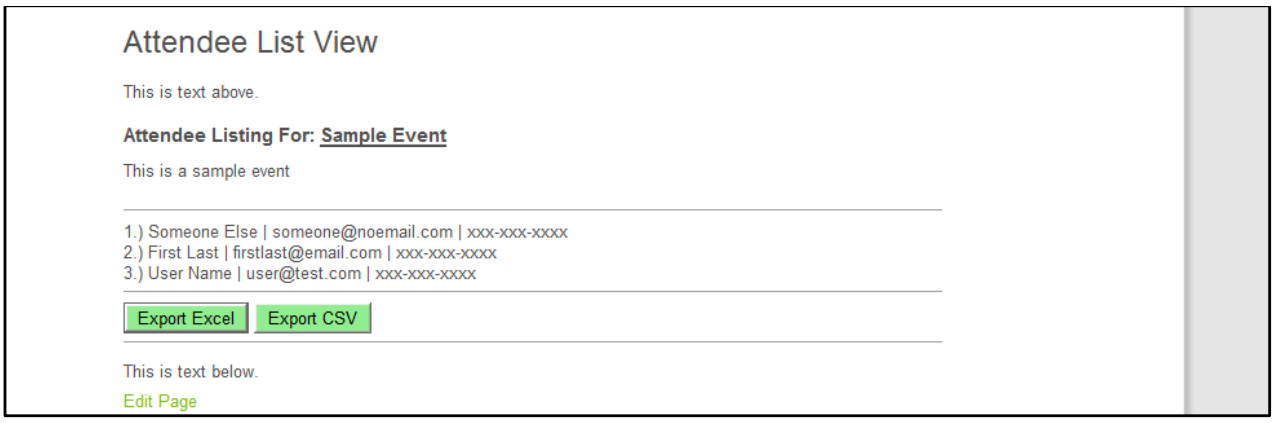
[Event_Registration_Single event_id="??"] Shortcode for showing registration page for a single event. Replace ?? with the id # of the event. Actual shortcode is shown on each event setup page. This shortcode will display the actual registration form for that event on the page. Placing this code on the page in HTML view. Note that you can enter text above and below the shortcode, but that text will be displayed throughout the registration process as this function merely replaces the shortcode with the registration form, then the payment data, while staying on the same page.





[EVENT_ATTENDEE_LIST event_id="??"] - Shortcode for showing the list of attendees for an event on a webpage. Replace ?? with the id # of the event. This shortcode will display the listing of the attendees who have signed up for the event. It will provide a download link in Excel or CSV of the list. It is highly recommended that if you use this shortcode that it is used on a password protected page. Place this code on the page in HTML view. Note that you can enter text above and below the shortcode. Content on this page will not refresh or change until you refresh or reload the page.

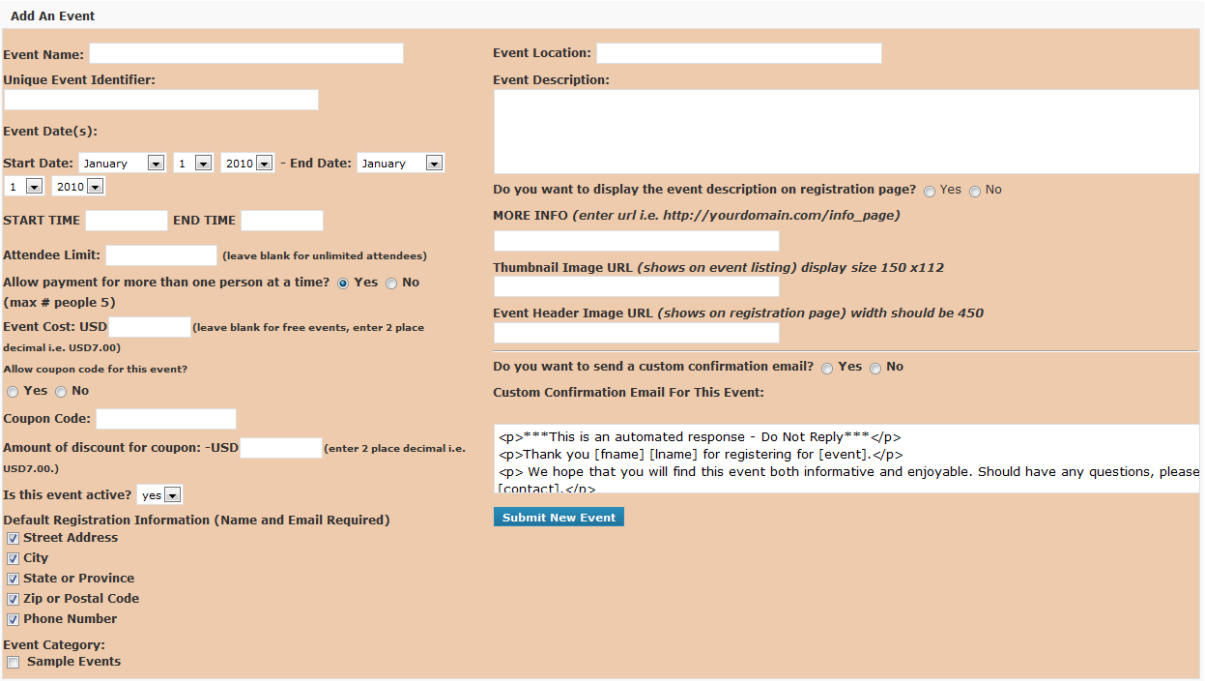




Adding An Event

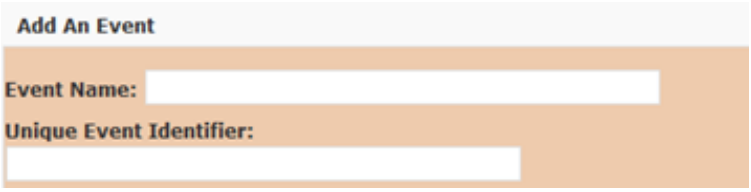
To add an event, from the Events page or Dashboard, click the blue “Add Event” button.

Once selected you will be displayed the event creation page.



The event creation page is laid out in two columns. The left column is where the core event information is entered.

Event Name: This should be the Event’s Title. It is recommended to keep this title fairly limited in length as to ensure it displays properly throughout.



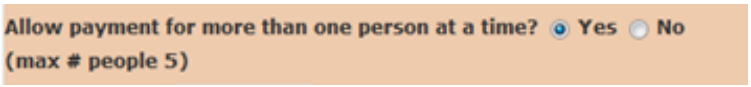
Event Identifier: Is a unique ID code you use to help you differentiate between events that may have the same name. For instance if you are hosting an event in multiple cities, the Unique Identifier might include the city name, where the Event Names may all be the same.

Event Dates: Please select the day the event starts and the day the event ends using the drop down selections.

Start Time and End Time: Please enter the times for the event in military time, i.e. 2:00pm would be 14:00.

Attendee Limit: If your event has limited seating or you wish to control the maximum number of attendees you will allow for an event, enter the total available seats in this form field. If your event has unlimited registration, please leave the field blank.

Current the plugin is set to allow a person to pay for up to five people when registering, through a dropdown box on the registration form. While we collect the count, there is currently not a way to collect the additional names. If you wish to collect the names of each person, set the allow payment for more than one person to no.



The event cost field is proceeded by the currency format you defined in the organization setup form. If the event is to be free, please leave the field empty. Please do not use any currency symbols, only enter 2 place decimal figure in the amount of the currency.

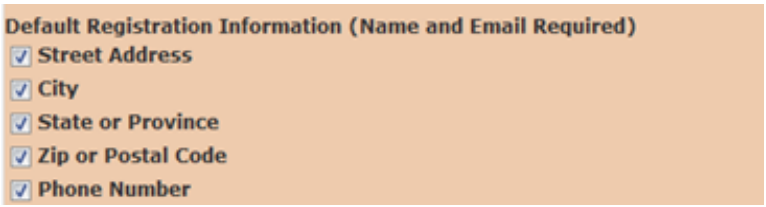
The plugin allows you to offer discounts to people during the registration process by use of a Coupon Code. The Coupon code is a unique name or number you create for this event. To allow the use of the Coupon you must check yes in the allow coupon and then enter the code in the field. The coupon will not work without checking yes in the allow box. Once you have setup the code, you will need to define the amount of the discount. This amount will be the amount deducted from the registration fee. For

example if the event cost is $25.00 and the discount is $10.00 then when the person registers it will show the fee as $15.00 for the event.

In the organization setup you were asked if you wished to display all events or the active event. By selecting single event in the organization and then selecting yes here, this will be the only event displayed on the page where you used the {EVENTREGIS} code.

If you are showing all events, this field is not relevant.

Default Registration Information. Originally the plugin required the entry of Address, city, state , zip code and phone number. Now those fields are optional, simply uncheck the items you do not wish to collect during the registration process. The plugin still requires first name, last name and email address.



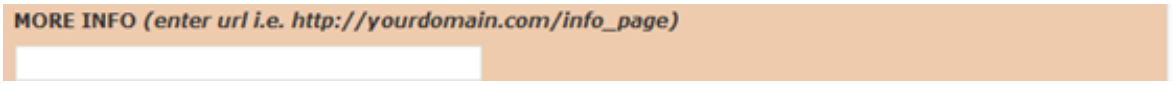
If you wish to group your events by categories, you can create categories under the Category Page in the Plugin. Once the categories are created you can check them off if you wish the event to be listed on the page you used the category short code on.

The right column contains the following fields:

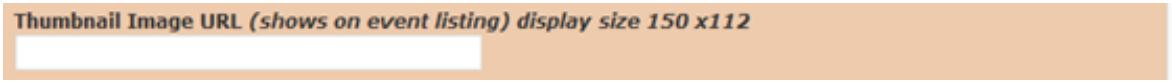
Event Location: Used to display where the event will be held. This field is optional, but helps bring clairity when you have similar events in different locations.

Event description is the general overview of the event. This information is displayed at the top of the event registration form. Displaying this information is an optional component. If you wish it displayed, make sure you check yes under the description.

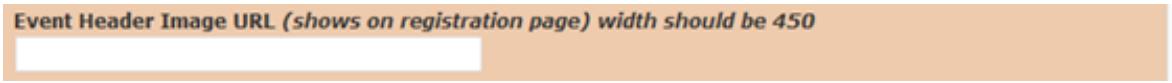
The more info url is for you to put a url to a page you may have setup with more details (schedule, speakers, downloads, etc.) for the event. This gives a person the ability to drill down before committing registration information.



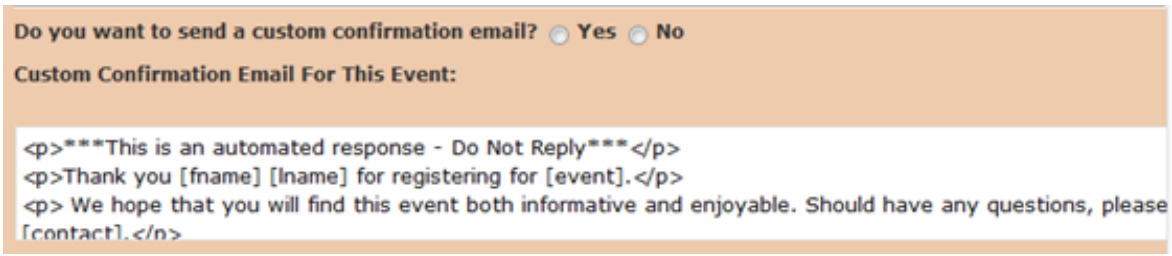
Thumbnail image URL is for a link to an image that you wish to display on your events listing page. Ideally this image should be 150 x 112 or 300 x 224 (but will display at 150x112 aspect). You must have enabled this feature in the organization setup tab for this to function. Even though this feature is enabled it is not necessary to have an image on every event, only on those you wish.



Event Header image URL is a link that you wish to display on your registration form for an event. This image should be 450 in width, but height can be flexible, recommended would be around 125 pixels to maintain a smooth look to the page without taking up too much space.



The plugin supports sending confirmation emails to people registering confirming receipt of their information. In order to send confirmation emails, this feature must be turned on in the Organization configuration tab to function. If enabled events will send the default confirmation email unless you specify to us a custom one for this event. If you select yes, please define the email in the space below.



One of the nice features is that you can pull registration information and include it in the email. Currently the plugin supports the following tags: [fname], [lname], [phone], [event],[description], [cost], [company], [co_add1], [co_add2], [co_city],[co_state], [co_zip],[contact], [payment_url], [start_date], [start_time], [end_date], [end_time]

A sample email would look like this:

This is an automated response - Do Not Reply

Thank you [fname] [lname] for registering for [event].

We hope that you will find this event both informative and enjoyable.

Should have any questions, please contact [contact].

If you have not done so already, please submit your payment in the amount of [cost].

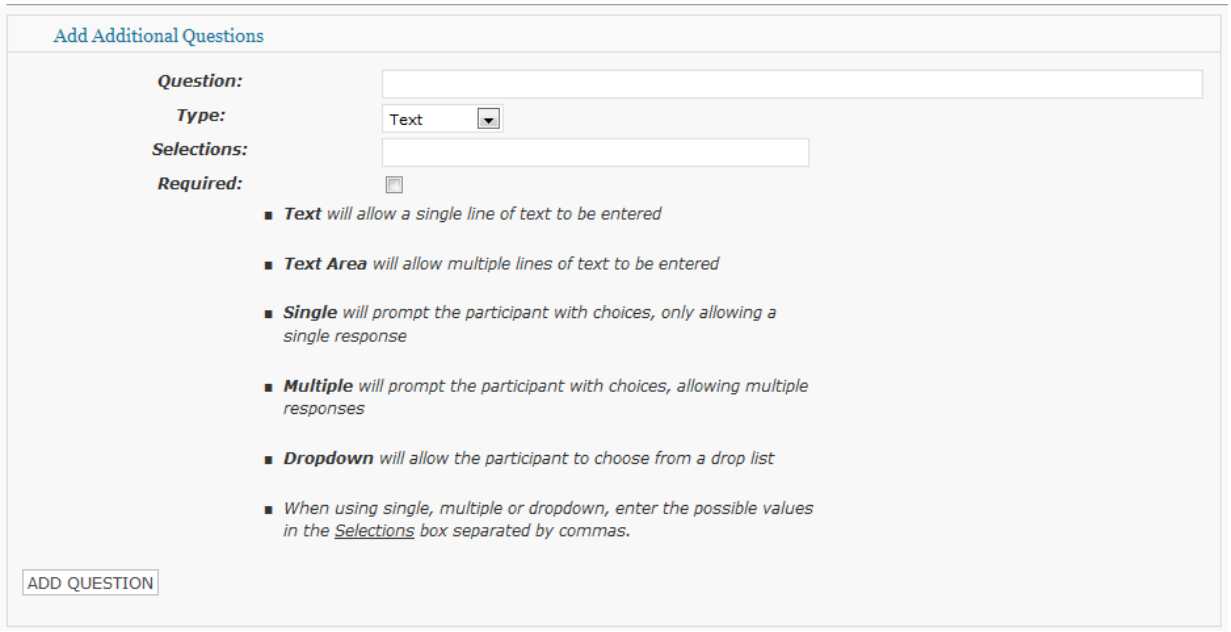
Click here to reveiw your payment information [payment_url].

Thank You.

That should complete the event setup process, all that is left is to click the “submit new event” button and it should show up in the event listings.

From there you can edit, copy, delete view the list of registered attendees or add custom questions to the event registration form.

Adding Questions to the Registration Form



One of the nice features of the registration form is that you can add as many custom question to the form as you desire, to gain specific information from your attendees. The plugin support five types of questions.

Text: This is generally what I would call short answer questions, typically consisting of a single sentence. Where the registering person would type in their response. You do not need to put anything in the Selections field for this question type.

Text Area: This is similar to the Text, except you are looking more for an paragraph/multiple sentence response. You do not need to put anything in the Selections field for this question type.

Single: This will provide radio button answers where the registering person will select one of several options. Yes/No, True/False are good examples of this type of question. Basically a multiple choice question with one possible choice. When entering this question you will need to provide the list of choices that will appear. Separate your choices by a comma:

True, False Do not provide answer choices that have a comma in the response!

Multiple: This is similar to Single Type questions but gives them the option of selecting several of the choices instead of just selecting one item. Basically a multiple choice question with several possible choices. When entering this question you will need to provide the list of choices that will appear. Separate your choices by a comma:

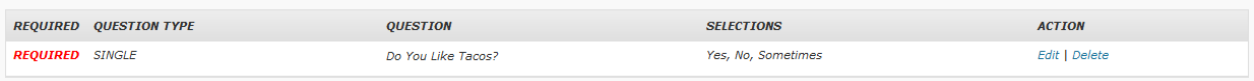
Newspaper, Web, A Friend, Billboard

Do not provide answer choices that have a comma in the response!

Dropdown: This question type is similar in nature to the Single, exept instead of providing the choices in radio buttons, it provides them in a drop down box. This is handy if you have a lot of choices the person needs to choose from, it prevents them from taking up a lot space on your registration form.

The last feature of adding the questions is whether you will need to question as required or not. If you check required, the registration form will not submit until the attendee answer the question(s). You can have some questions required and some not if you desire.

Once you have entered your question and possible answers hit submit. The question will go to the database and now be available on the registration form.



REQUIRED	QUESTION TYPE	QUESTION	SELECTIONS	ACTION
REQUIRED	SINGLE	Do You Like Tacos?	Yes, No, Sometimes	Edit | Delete