Step 2: Setting up Basic Information
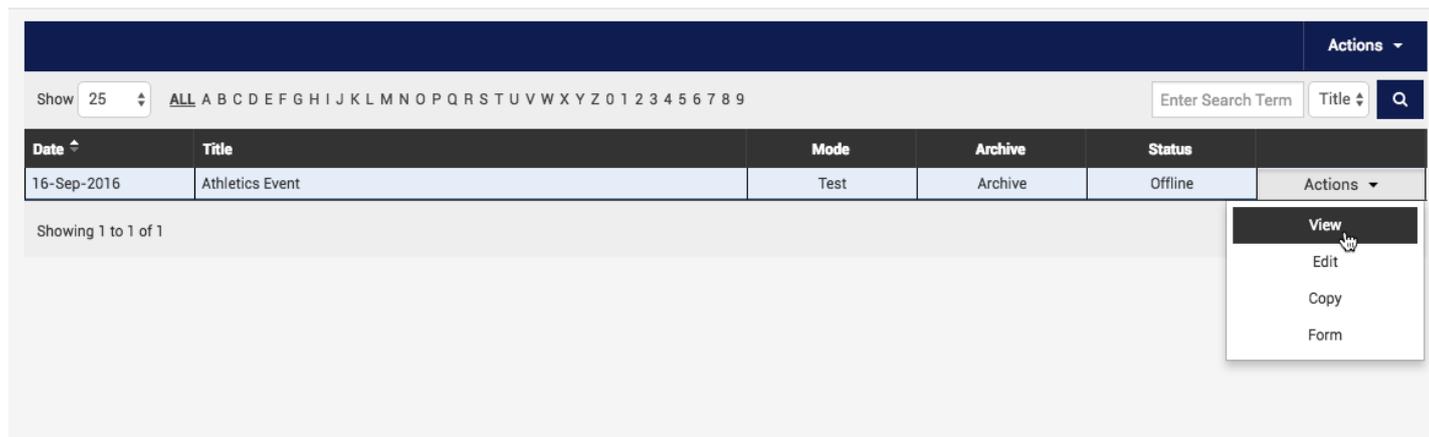
Last Modified on 15/02/2017 12:11 pm AEDT

Quick Steps: Events > Click on the Event > Basic Information > Edit
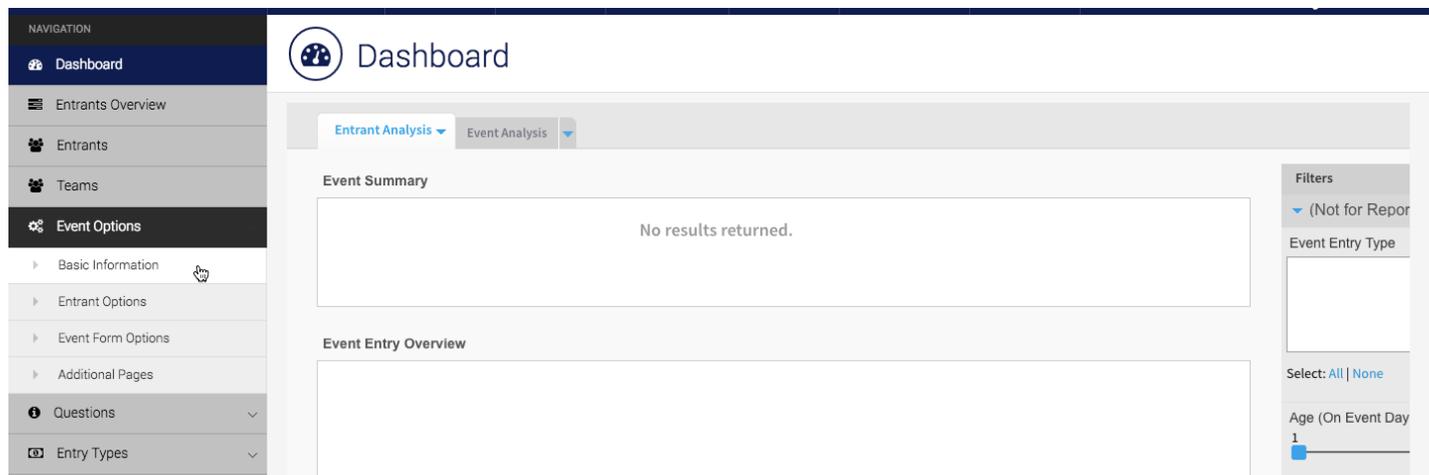
1. Within your OST portal, select **Events** from the top menu, then click on the name of the event, or click **Actions > View.**

2. Select **Event Options**, then **Basic Information** from the expanded left menu

Click on the relevant tab that you wish to update and click Edit.

Now you can set up all of the basic information that makes up your event.

You have already set up your Event Name and Dates in the initial setup, now its time to complete the rest of the information. Use the information below to guide you on how to complete each section and whether it is relevant to your event.

General Tab

Edit Option: allows Entrants to go back in and make changes to their entry at a later date. Log in details will be sent to the Entrant upon registration confirmation. This option can be set to Yes or No. If set to Yes, in **Edit Option Date**, please select a date at which entrants can no longer make changes.

Location: Insert the Location of the Event. If you use the name of the location found in Google Maps and set**Show Map** to **Yes**, it will display the location of your venue on the front page of the **Events** form.

Contact / Telephone: The 'Contact' should list the name of the main point of contact for the event – this will appear on the form if the entrant clicks on 'Contact' on the homepage. Also in this section, it will display the Telephone number that is included here.

Website: The website will appear in the front of the Events form. Please add your website in this section and be sure to include the 'http://'.

Email Addresses: There are three email addresses that can be added to the **Basic Information**. Whilst only the Registration Email is mandatory, the fields can contain the same three email addresses as they all have different uses:

1. The main **Registration Email**, which you would have already completed. This is the main email address for the event.
2. The **Administrator Email**, which is used if **Administrator Email Advice** is set to Yes. This option sends the Administrator an email every time an entry is received to the event.
3. Finally, the **Contact Us Email** can be set, this shows on the Contact Us page on the Events form.

Theme: Initially this will default to Blue and Silver. If you have previously set up a theme, you are also able to select this in the drop down list. Otherwise, you will learn how to set up a custom theme in later steps.

Summary Tab

The Summary will display on the front page of your Events form, providing entrants information about your event before they register. If you would like to include a summary, please click **Edit** and then enter in the information you would like to display. Ensure you click **Save** once completed so that the details update.

Images Tab

This is where you can upload images for your Events form in order to customise the look of the form online. We'll cover this further in Step 3

Other Tab

Entrants Limit: You have the ability to set an overall limit on how many entrants can enter your event. If you leave this as 0 you are indicating that there are no limits to the number of entries.

Entrants Limit Pending Timeout: the amount of time that is available in the Console when an entrant is completing their registration before the system will time out (and add them into pending).

Confirmed Entrants Listing: The Confirmed Entrants Listing allows entrants to check that their entry has been submitted through the Events form. This appears on the public view of the form.

Google Analytics Tracking ID: If you have previously registered for a tracking code through Google Analytics, you can paste it in here in order to track the click throughs on the form.

Show Print Confirmation Button: If yes is selected, entrants will be able to select to print the confirmation page.

Confirmation Tab

The Confirmation is the message that displays once an entrant has finished their registration. This message displays underneath the entrant's receipt number. If you would like to enter in specific information to appear on the screen once the entrant has submitted their form, you can type directly into this screen and click **Save.** The entrant will be able to print the confirmation page by selecting the **Print Confirmation** button at the bottom of the Confirmation Page

Waiver Tab

The Waiver is the Terms & Conditions that are associated with entry to the event.

Title: refers to the title/header of this section on the form eg Terms and Conditions or Entrant Declaration.

Waiver Confirmation: the statement that the entrant declares eg, 'I have read and agree to be bound by the above Terms and Conditions'.

Follow by inserting the relevant terms and conditions in the HTML box and click **Save.**

Invoices Tab

The Invoice is the additional information that you would like included on the email receipt that is sent to entrants. You can add images and links as required. Click **Save** once updated.

Attachment Tab

The Attachment allows event organisers to create an additional document that is attached to the Invoice as a PDF. This can be used for e-ticket purposes or to outline event information to entrants. Again, use the editor to add images, sponsor information and create a document that is branded to your event.

Membership Tab

The Membership tab allows organisations who are also using the STG OST Member Database to link their event to their members. Use Member Login Available and Member Login Required to allow your members to use their current Username and Password to login and register for the event. Automatic transfer refers to whether you would like the entrants to be automatically transferred across to your membership database (please note they will be automatically transferred as active and unfinancial).

Pending Email Follow-Up Tab

This functionality will send an email to all entrants who are in the Pending list if option is set to Yes. Include the merge field: URLPENDING so that they can click this link to continue their event registration. The email will be sent once and you can choose how long after the attempted registration that this will occur.

We would recommend adding a line for entrants who have already re-registered ignoring this email as it would no longer apply to them

Footer

Another option available to customise the look of the online form. This will appear at the bottom of the Events form.

Merchandise

If you would like to include a page for the entrants to select and pay for merchandise, you are able to assign products from your Shop console into this tab – they will then appear as a separate page for the entrant to view and select if they would like to purchase any products.

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