

## Pre-event Configuration Checklist

**Suggestion 1:** Before you begin creating an event be sure you know what information you need to collect and ONLY collect information you need.

**Suggestion 2:** Don't ask the same information twice (i.e. names, group information, etc.).

**Suggestion 3:** Test all combinations of the registration. If you are confused or see issues so will your registrants.

### Before You Start

First, determine the type of event to create in Event Management. What kind of event suits your needs?

- An single event that occurs on a specific day or date range [**Calendar Activity**]
- A dues collection, a fundraiser, or events that have no date range or very wide date range [**Dues**]
- A simple Donate Now button [**Fundraiser**]
- Events that have dependent activates (education days where there are choices of classes throughout the day, collections of camp, camps where there are session options) [**Programs**]

### Overall Event Information

- Is the financial account for this event's revenue already set up in Doubleknot?
- Does a similar event or the same event from a prior year already exist? [**Copy**]
- Will the event have different types of registrants (member or non-member, school or for-profit group), or different costs for registrants based on the type of group [**Price Groups**]
- Is this event intended for group registrations? [**Group attributes**]
- Are you planning to issue tickets for the event? If so, do you need individual tickets or a single ticket for each group?

### Registrant Information

#### *Registrant Cost Options*

- Do you need to collect the names of individual registrants (besides the person completing the registration)? [**Named Registrants**]
- Do you need to collect the total number of registrants or of each type of registrant? [**Un-named registrants**]
- Can you skip collecting information about registrants? [**Skip individual registrants**]
- Do you need to collect information based on the type of registrant (i.e. phone number for adults, and birthdate for youth)? [**Registrant attributes**]
- Are there different types of registrants (i.e. adults, youth, seniors, etc.)? [**Multiple costs**]
- Do you have early discounts or late fees based on when a person registers?
- Do you have the need for waitlists? If you're using multiple registrant types, do you need to set waitlists for each registrant type? (Waitlists are only available for named registrant cost option)
- What is the event's overall capacity? If you are using multiple registrant types, are there capacity limits for each type?
- Do you need to enforce a ratio of registrants (i.e. number of adults to children) [**Registrant Ratios**]

#### *Collecting Additional Registrant Information*

- Do you need to collect additional information that isn't available in registrant attributes? [**Forms**]
- Is the information applicable to all registrants? [**Overall registration forms**]
- Is the information required for individual registrants or types of registrants? Information specific to each registration or type of registration [**Each registrant**]
- Do you have back office information you need to capture? [**Admin Only Forms**]
- Is certain information applicable to all like registrations in the cart? [**Auto-fill forms**]

### **Information Displayed to Customers**

- Do you want to provide simple instruction to registration owners on certain pages? (Keep them short!) **[Participant Instructions]**
- Do you want to display similar events to the customer for easy selection and registration? (all 5th grade camps) **[Categories]**

### **Pricing, Payments and Billing**

- Does your event allow payment over time? **[Payment Schedules]**
- Do you want to send out billing reminders as payments become due and/or when payments are late? **[Notifications]**
- Do you plan to promote the event with discounts?
  - Automatically applied discounts (e.g. one free adult for every 5 youth)
  - One-time use discounts for camperships or other special discounts
  - Published coupon codes for discounts

### **At the Event**

- Do you want to facilitate check-in by scanning tickets? **[Sales Station or Check-in App]**
- Do you need to accept at-the-door registrations, final payments, and/or registration changes at check-in, or sell event merchandise? **[Sales Station]**