









Group Events function – how to instructions

Group webpage

Yoga 1

Time - 09:15 AM to 10:30 AM
Week in Month - Weekly
Day - Tuesday
Venue - Masonic Hall
Vacancies - Waiting List

Events

Name	Date	Time
Yoga 1 - July/Aug	25 Aug 2021	00:00
Yoga 1 - May/July	07 Jul 2021	00:00

The group practises Hatha Yoga including exercise, breathing techniques and some meditation.

It is suitable for women and men of all fitness levels.

Members should bring a yoga mat and blanket.

New icon – “Add event”

NB: Finance icon temporarily removed

Once an “event” is created the Group Events are listed above the general information about the group

Click on the event to take you to the Group Event page

NB: The date is always the date of the last class

Group Event

Yoga 1 - May/July Event

✉️ ✉️ 🔍 £ 👤 📅

Event Details

Date: 07 Jul 2021
Category: Group Events
Attendance Fee: £21.00
Vacancies: 1

Yoga 1 - Wednesday 19th May 2021 until Wednesday 7th July 2021 excluding 2nd June

Masonic Hall - 9.15 - 10.30am

Details of the "event" appear separately to the group page.

The icons now relate to this event only



Email Event Organisers

Email Event Attendees

View Event Details

Group Event Finance

Manage Event Attendees

Edit Event

Edit Event



Select the edit "Edit Event" icon.

Edit the Yoga 1 - May/July Event

General

Group: Yoga 1

Name:

Alias:

Category:

Code:

Attendance Fee:

Budget:

Image:

External Url:

Event Buddy:

Meeting

Date:

Maximum Attendees:

Waiting List Size:

Guests Allowed?:

Content

Rich text editor toolbar with icons for undo, redo, bold, italic, underline, bulleted list, numbered list, link, unlink, font color, background color, font size (Arial, 16px), and text color (Normal).

Any changes to the "General" column should be made by the Groups Co-ordinator

You can edit the information in the Meetings column and the Content box as required.

NB – The date should always be the date of the last class.

Manage Event Attendees

Members

Search Members... X Search Members... X Save Waiting List Order

1874 - Richard Aston
3861 - Bar Bailey
841 - Donald Bone
4099 - Cathy Bruderer
1035 - Joan Chadwick
240 - Joy Harrop
4332 - Steph Kay
4334 - Cynthia Louth

1009 - Shirley Catherall
 1110 - Barbara Rogers
 4311 - Karen Allen
 25 - Betty Burke
 3373 - Lynn Halliburton
 1082 - Millicent Isherwood
 120 - Cynthia Kelly
 330 - Pat Louder

Available Members (15) **Attendees (14/15)** **Waiting List (0/2)**

i Add the event attendees from the list on the left to the list in the middle using either the arrow buttons or by double clicking on the name. You can select multiple members at a time by holding down the Ctrl key. Use the checkboxes next to the names in the middle column to specify the Event Organisers. If the event capacity has been reached members will be added to the waiting list in the right column. They can be added to the event as soon as the number of members in the middle column is less than the event capacity.

Group members appear in the left column.

To add a member to the "event" click on their name to highlight then use the right arrow between the columns to add them to the "event"

Event participants are in the middle column.

Event Waiting List members are in the right column.

Group Event Finance Summary



Yoga 1 - May/July - Finance Summary													
Normal Ticket Price £21.00 Maximum Number of Attendees 15 Total Attendees (So Far) 14 Organisers Cash in Hand						Payment Details Total Payments Received £0.00 Total Refunds £0.00 Total Outstanding Payments £294.00 From (Number Of Payees) 14 Total Income Expected £294.00 Budget £0.00							
Cash/Cheques Received - Attendees £0.00 Cash/Cheques Received - Other £0.00 Cash Refunds Processed £0.00 Cash Already Banked £0.00 Expenses Retained £0.00 Cash Held For Refunds £0.00 Cash Available To Be Banked £0.00													
Event Attendees											Action Date: 16 Apr 2021		
	MEMBER (PAYING)	OTHER MEMBER	NUMBER OF NON-MEMBER GUESTS (IF ANY)	PAYMENT AMOUNT REQUIRED	DISCOUNT	PAYPAL RECEIPTS £ (NET)	ORGANISER RECEIPTS £ (NET)	BANK RECEIPTS £ (NET)	COMMENTS	PAYMENT REQUEST DATE	PAYMENT REQUEST COUNT	OUTSTANDING/ REFUNDABLE	ACTIONS
	4311 - Karen Allen			£21.00								£21.00	

The top half of the Finance Summary page provides details of the “Ticket Price” i.e. the cost of the “event” or session fee, the cash in hand and any payments received and those still outstanding.

The bottom half of the Finance Summary page lists the “Event Attendees” with details of the amount to be paid by each person.

The **Actions** column, (last column on the right) contains a “Send Payment Request” icon as well as a “Mark as Paid” icon.

The “Mark as Paid” icon is used when someone pays by cash or cheque.

PayPal payments are recorded automatically

The three icons on the top right hand of the page are:

“View Event Transactions” / “Edit Event Finance Details” & “Add Bank Payment”

Use the “Add Bank Payment” icon to record any money (collected by cash or cheque) and paid into the u3a bank account. This is the same as the group finance page i.e. Amount paid in, Method of payment, Paying in Ref and Date

Group paying in books can be used or use bank transfer

Group Event Finance Summary con't

Yoga 1 - May/July - Finance Summary																																											
<table style="width: 100%;"> <tr> <td>Normal Ticket Price</td> <td style="text-align: right;">£21.00</td> </tr> <tr> <td>Maximum Number of Attendees</td> <td style="text-align: right;">15</td> </tr> <tr> <td>Total Attendees (So Far)</td> <td style="text-align: right;">14</td> </tr> </table>						Normal Ticket Price	£21.00	Maximum Number of Attendees	15	Total Attendees (So Far)	14	Payment Details																															
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From (Number Of Payees)	14																																										
Total Income Expected	£294.00																																										
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Event Attendees Action Date: 14 Apr 2021 																																											
	MEMBER (PAYING)	OTHER MEMBER	NUMBER OF NON-MEMBER GUESTS (IF ANY)	PAYMENT AMOUNT REQUIRED	DISCOUNT	PAYPAL RECEIPTS £ (NET)	ORGANISER RECEIPTS £ (NET)	BANK RECEIPTS £ (NET)	COMMENTS	PAYMENT REQUEST DATE	PAYMENT REQUEST COUNT	OUTSTANDING REFUNDABLE	ACTIONS																														
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	1009 - Shirley Catherall			£21.00								£21.00																															
	3373 - Lynn Halliburton			£21.00								£21.00																															

Event Attendees are listed in the left column in alphabetical order.

The edit pen on the left can be used to link members names if someone would like to pay for another participant

Event cost

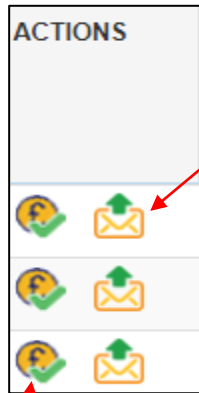
If someone pays by PayPal the amount will be recorded in this column automatically

If payment is by Cash or Cheque it's recorded in this column

Outstanding amount per person

Actions column - see details on next page

Group Event Finance Summary con't - Actions column



When you are ready to ask all participants to pay for an Event click on the “Send Payment Request” icon and an email is generated automatically requesting payment

The email provides a link to pay online using PayPal

If members don't wish to pay online, they are asked to let the Event Organiser know and to arrange to pay by cheque or cash before the first session.

If someone hasn't paid you can use the “Send Payment Request” icon to send another email payment reminder

If payment is made by cash or cheque use the “Payment Made” icon against the members name to record the payment on the finance summary page

NB: If payment is made by PayPal the finance summary page is automatically updated with the online payment

Finance Summary - Event Attendees

	MEMBER (PAYING)	OTHER MEMBER	NUMBER OF NON-MEMBER GUESTS (IF ANY)	PAYMENT AMOUNT REQUIRED	DISCOUNT	PAYPAL RECEIPTS £ (NET)	ORGANISER RECEIPTS £ (NET)	BANK RECEIPTS £ (NET)	COMMENTS	PAYMENT REQUEST DATE	PAYMENT REQUEST COUNT	OUTSTANDING/ REFUNDABLE	ACTIONS
	1483 - Jackie Adams			£10.00		£10.00				14-Jan 22:54	1		

When payment has been made the box to the left of the name will change to green

The payment receipts will be marked in either the PayPal or Organiser column

The payment request date is listed as well as the number of email payment requests

Events details



Event Details - Yoga 1 - May/July

Event Attendee Details - Yoga 1 - May/July

Membership No	Name	Email	Phone	Emergency Name	Emergency Number
1009	Shirley Gatherall	[Redacted]	01270 [Redacted]	[Redacted]	01270 [Redacted]

Print icon, Excel icon, Register icon, Plus icon

Print - Emergency Contact information

The Event Details page provides a full list of participants with their Emergency Contact information

Registers can be downloaded by using either of the following icons
“Create Event Register Excel”
or
“Create Event Register”

Email Group Event Attendees



Email Event Attendees


From: Search for people...

Override Sender Name: Override Sender Email:

To: Search Members... Search Members...

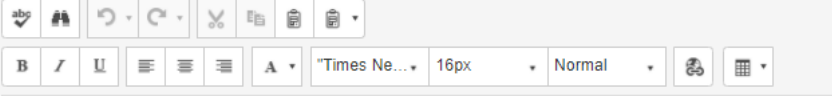
<input checked="" type="checkbox"/>	1009 - Shirley Catherall	<input type="button" value="▶"/>
<input checked="" type="checkbox"/>	1110 - Barbara Rogers	<input type="button" value="▶"/>
<input checked="" type="checkbox"/>	4311 - Karen Allen	<input type="button" value="▶"/>
<input checked="" type="checkbox"/>	25 - Betty Burke	<input type="button" value="▶"/>
<input checked="" type="checkbox"/>	3373 - Lynn Halliburton	<input type="button" value="▶"/>
<input type="checkbox"/>	1082 - Millicent Isherwood	<input type="button" value="▶"/>
<input checked="" type="checkbox"/>	120 - Cynthia Kelly	<input type="button" value="▶"/>
<input checked="" type="checkbox"/>	220 - Pat Leydon	<input type="button" value="▶"/>

Event Attendees (13) (1 postal members) Selected Members (0)

 Members without a valid email address cannot be added as recipients

Subject: Yoga 1 - May/July Event Message

Attachments: Select Select files to upload .jpeg,.jpg,.png,.gif,.doc,.docx,.xls,.xlsx,.pdf,.rtf,.txt

Content: 

Emails can be sent to the “event” participants using the “Email Event Attendees” icon.

This works in the same way as the general group email

NB: Members without email are identified and should be contacted by phone

Email Event Organisers



Email Event Organisers

EMAIL INSTRUCTIONS:

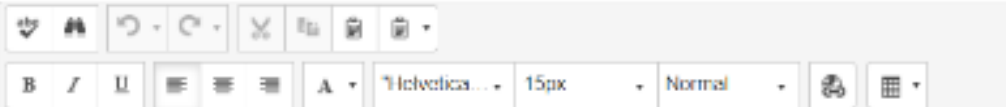
1 - To Apply to Attend an Event (Just Yourself) Send the pre-written email below by clicking the **Send Email** button at the bottom - that's all. The organiser will reply within a few days to advise if a place has been reserved for you and give payment options. Applications will be dealt with in the order in which they are received.

2 - To Apply for Yourself Plus One Other Member You can also apply and pay for one additional member. Please add their name and membership number under further details at the bottom of the email. You will receive an email giving payment options for both yourself and the additional member.

3 - To Ask the Organiser a Question rather than applying to attend, just delete the current content and compose and send your message.

Subject: Enquiry about Yoga 1 - May/July by Paula Reilly-Cooper

Content:



Dear Event Organiser,

I wish to apply to attend the Yoga 1 - May/July Event. Please confirm as soon as possible if you are able

When members are logged into the Sandbach u3a website, they can choose the event from the Groups webpage and use the "Email Event Organisers" icon to apply to join the event or ask for more information.

Instructions are contained within the blue box and the email if prepopulated with the members details. They just need to amend and /or add any questions they may have.