Add an Event Step 1 - Create the Event Type

The first step in creating an event in your database is to create the **Event Type**. Think of this as the umbrella and all of the specific occurrences of that type of event (dates and times) are held under that umbrella. The Event Dates & Times are created in the **second step**.

Create an Event Type

1. Go to **Events** (menu) > **Add Event Type**.

2. Give the Event Type a **Name**, **Location**, and **Category 1**.

3. Click **Save**.

4. Enter specifics about the event on the *Summary* tab of the *Event Type* record. Each field on the Summary tab is explained in detail below. While the fields are optional, we recommend you complete as many as possible. **Save Changes**.

   ▼ Click here to see **Event Type Summary Fields** Explained

Fee	Enter the cost of the event per registrant as the **Event Fee**.
Allow Enrollment For	Select **Family** if you prefer to allow a customer to enroll their Family and fill 1 Event opening. Select **Student** to allow the customer to enroll up to 5 students and fill 1 event opening per student. *Note: What you enter here will be the default for all Event Dates/Times but it can be changed for any of the event dates individually.*
Min Age/Max Age	Enter a **minimum** and **maximum age** for the event, including years and months. The min/max age can be used to set age restrictions for event registrations. Note: *Minimum Age* and *Maximum Age* are only factored in if *Allow Enrollment For* is set to *Student*.
Cut Off Date	Optionally, enter a **Cut Off Date**. If a cut-off date is entered, the student's age on the cut-off date is used to determine if the student meets the event's age requirements. Note: *Cut Off Date* is only factored in if *Allow Enrollment For* is set to *Student*.

Category 1	Select a **Category 1** to have assigned to all of the event fees.
Cat 2/Cat 3	Add a **Category 2**/**Category 3** if applicable. These fields will further classify the event fees.
Maximum Size	Enter a Maximum Size for the event.*Note: For a Birthday Party or Private Event, enter the Maximum Size as 1. This ensures that the event is booked by only one customer.*
Payment Method Information	*Do you require parents to save a payment method before enrolling in this Event Type?* ○ If ePayments is not set up, this section is NOT visible. ○ If ePayments is set up, you will see a**Payment Method Information** section with **Credit/Debit Card Information** field and a**Bank Account Information** field (Yes/No/Optional). If payment in the Parent Portal is required, they will also see a checkbox for **Omit this Event Type** from requiring payment during Parent Portal enrollment. Select **Yes** to require that the credit card fields be completed. Select**No** to not display the credit card fields. Select **Optional** to display the fields but allow the registrant to choose whether or not to add credit card details. *Note: The option to pay via bank account is not available when registering for an event. This field would only be capturing that information to secure the booking.*
Post Event Fee Per	Select **Family** to auto-post the Event Fee once per Family. Select **Student** to auto-post the Event Fee once per student. Select**Do Not Post Fee** if you do not want the event fee to automatically post when a customer registers.
Session	Add a **Session** from the Session drop-down choices.
Transaction Type / Sub-Type / Note	If Post Event Fee Per is either**Family** or **Student**, include a **Transaction Type**. Optionally, include a**Sub-Type** and **Note.**

Display on Internal Calendar	Select **Yes**/**No** depending on whether this Event should display on the internal Event Calendar. This calendar can only be seen by a User logged into Jackrabbit.
Calendar Label	Whatever you type here will display as the**Event Name** on the Event Calendar.
Background Color	Click the**crayon icon** to choose a color. This color will display as a background for the *Calendar Label* on your Event Calendar. We recommend using lighter colors as they make the calendar easier to read.
Display to Customers	How do you want this Event Type to display on your Event Calendar: ○ Select **No** if you do not want the event to display on your Event Calendar. ○ Select **Open Dates Only** if you prefer only open events to be displayed on your Events Calendar. ○ Select **Open & Booked Dates** if you prefer that both open & booked dates display on your Event Calendar. *Note: An Invitation Only Event will not display on your Event Calendar, regardless of this setting.*
Calendar Header	Create a header for your Event Calendar that displays when it has been filtered for a specific Event Type. The Event Calendar below is filtered for the *Event Type* **Circus Birthday Party**. It has a*Calendar Header* assigned, **Birthday Parties**.
Online Reg Form Graphic URL	Customize your event registration form with special images or graphics for specific events. In order for the image to be displayed on your registration form, it needs to reside somewhere on the internet and have a URL (a web address that usually starts with https:// or http://). Enter that URL here. See **Frequently Asked Questions** below for more details.
Notification Email(s)	An email notification will be sent to the email address(es) entered here whenever a customer registers for an event. Separate multiple email addresses with a comma.

5. Go to the**Description** tab and add the*Internal Description* (this description is seen by Users within

Jackrabbit) and the *Registration Form Description* (this description will be seen by customers).**Save Changes**.

▼ Click here to see a sample **Event Registration Form**

1 - Customize your registration form with a graphic of your choice. It must 'live' online and have a URL and that URL is added to the **Event Type** > **Summary** *tab, in the* **Online Reg Form Graphic URL** *field.*
2 - Add a description of the event to your registration form.

6. Add questions that you would like event registrants to answer on the**Questions** tab, for example, "*Will you be bringing cake?*" Questions can be formatted as*Check box, Text box, Large Text,* and *Yes-No.* Questions can be set to*Optional, Hidden,* or *Required,* with the exception of checkbox questions that can't be made required.
   Answers are stored in the*Event Date/Time* record on the*Questions/Options*tab. From there, you can print the answers for that event date or export them (Excel, .csv, or PDF).

   ▼ Click here to see a sample **Event Type Questions tab**

7. Select the**Agreements** tab. Enter any legal policy or verbiage you'd like the customer to agree to prior to registering for an event. Each agreement text record will be followed by its own *I Have Read and Agree checkbox*on the Event Registration Form. The customer must check these boxes and enter their e-signature in order to submit the registration form.

   ▼ Click here to see a sample **Event Type Agreements tab**

   Click **Copy Event Type** to quickly create another similar Event Type. This will copy all information on the Event Type Summary tab to the new Event Type with the option to copy questions and agreements.

Now that the Event Type is set up, you can move on to the second step of adding an event, which is to **create the specific dates and times that this Event Type will occur.**

Expand/Collapse All

Frequently Asked Questions

Q. *I don't understand what an Online Reg Form Graphic URL is or how to add it?*

A. Each Event Type allows you to add a graphic or image to the registration form associated with it. You can create and use special images and graphics for specific events. For example, you may have a special image that you use for birthday parties and a different image that you use for open houses.

In order for the image to be displayed on your event registration form, it needs to reside somewhere

on the internet and have a URL (a web address that usually starts with https:// or http://). In many cases, you may already have the image somewhere on your website. If not, there are many cloud-based services that provide an instant URL when you upload the image to the service.

Q. *Can you explain why some of my Events have a background color of light yellow? I didn't select that color.*

A. When an Event has reached the maximum enrollment, it will display on the events calendar in a light yellow color. This means the Event status has changed to booked.

Q. *Can I automatically add the tax to Event Fees?*

A. Yes, go to the**Gear** (icon) > **Settings** > **General** > **Organization Defaults** (left menu) > **Tax Settings** (section) and set **Tax Tuition Fees** to **Yes**. (Note: this will also apply tax to Class tuition)

Q. *Why can't I make the checkbox event questions required?*

A. As a question, a checkbox type has 2 possible answers; unchecked (clear) says one thing, and checked (selected) says the opposite. You can't require registrants to select the checkbox because leaving it blank is actually one of the possible answers.

If you want to make questions required, it's best to ask yes/no questions.