

Eventsforce basics

Creating events in Eventsforce

Eventsforce is the events management software that is integrated with our website. Using it allows members who have ticked the box for your group to see your events in their Member Dashboard, as well as on the group's own webpage.

It is a very powerful platform and can manage extremely complex events; however, thankfully, Regional Society and Special Interest Group events are straightforward to create and easy to manage.

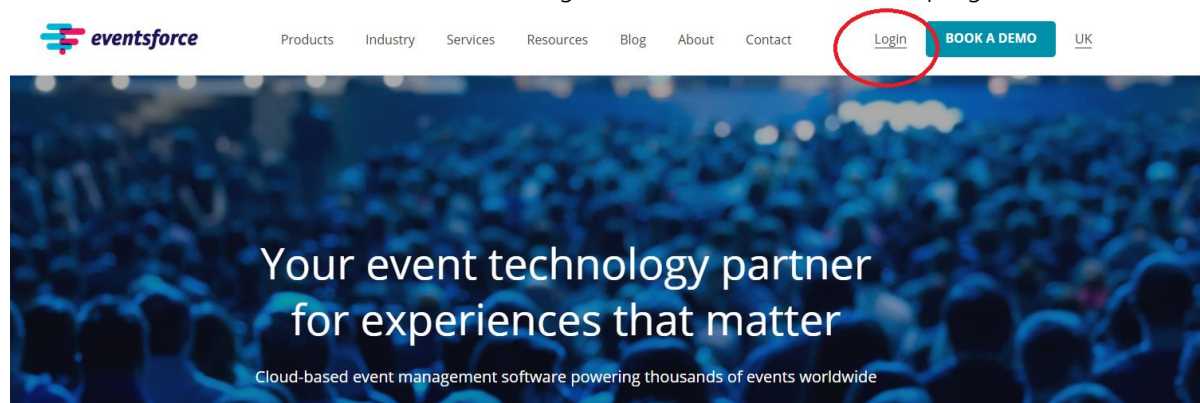
If you can manage MS Word and stick to a simple tick-list of actions, using Eventsforce in this limited capacity will bring lots of benefits and no problems.

Contents

Logging In	P2
Find your template	P2
Duplicate your event	P2
Set up your event	P3
Time, date and group	P4
Website pages	P5
Edit your banner text	P5
Edit your main text	P6
Return to the setup pages	P6
Make your event 'Live'	P6

Logging in

Go to www.eventsforce.com Click the 'log in' button which is in the top right corner.



Enter the 'client account name*', which is **theorsociety**

Enter your username and password. Then confirm your username and password.

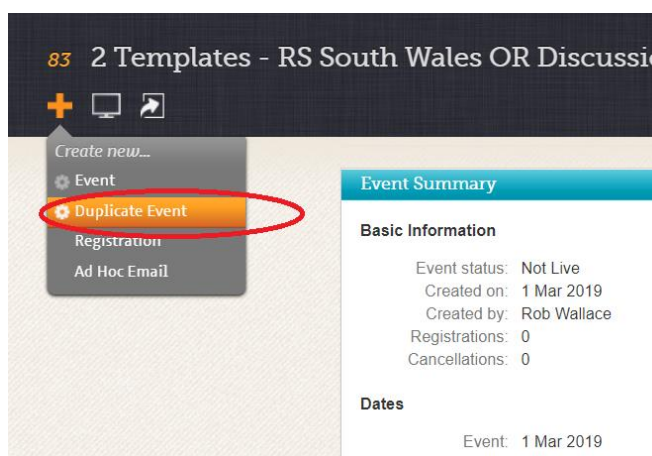
Find your template

Once you're logged in, find your template by selecting 'Events' and then 'Show all Events'. This will bring up the list of all the events relevant to you. Select your template by double-clicking.



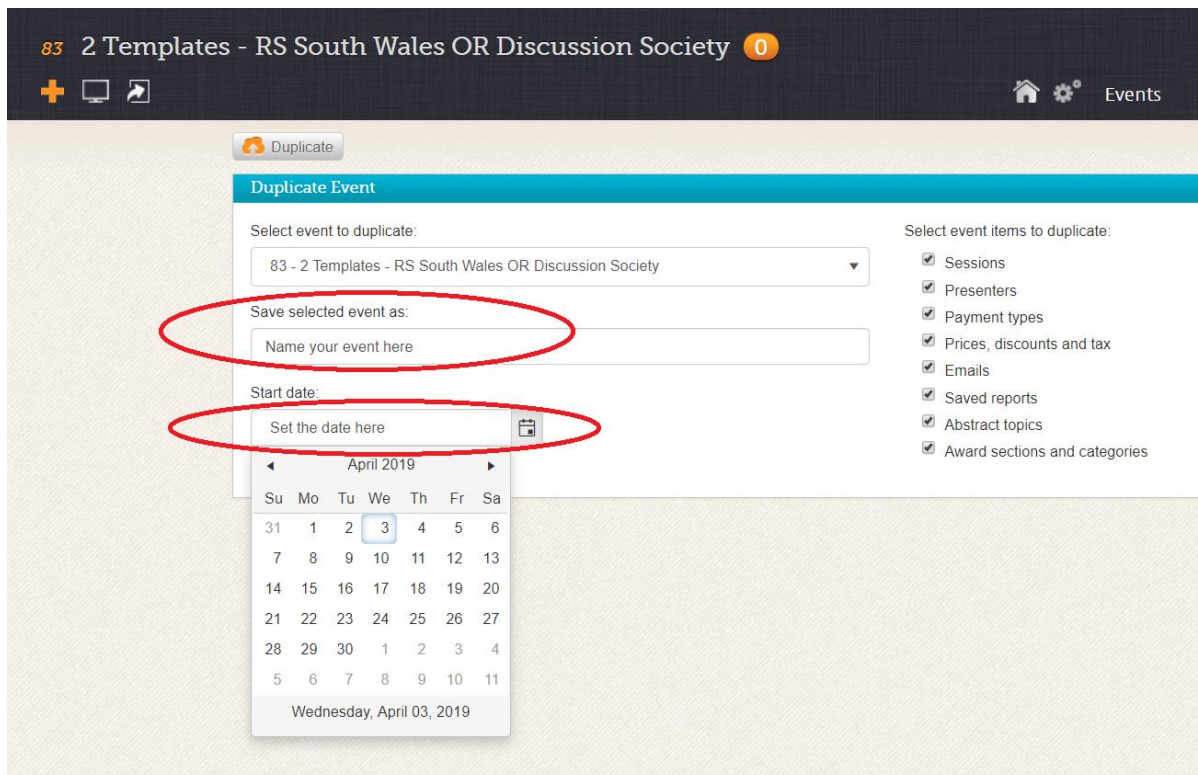
Duplicate your event

To create the duplicate event, click on the plus symbol in the top left, and select 'Duplicate Event' in the drop-down menu.



Give your event a name – this is the name that will appear on the website, so make it useful to potential interested people. Set the date.

Then click 'Duplicate' to save your new event.



Set up your event

Select 'Setup' on the top right menu, followed by 'Events' and then 'Properties'.



Time, date and group

Here you can set the start date, start time, end date and end time of your event. You can also ensure that your event is correctly assigned to your editing permissions, meaning it will show up on your events list within Eventsforce.

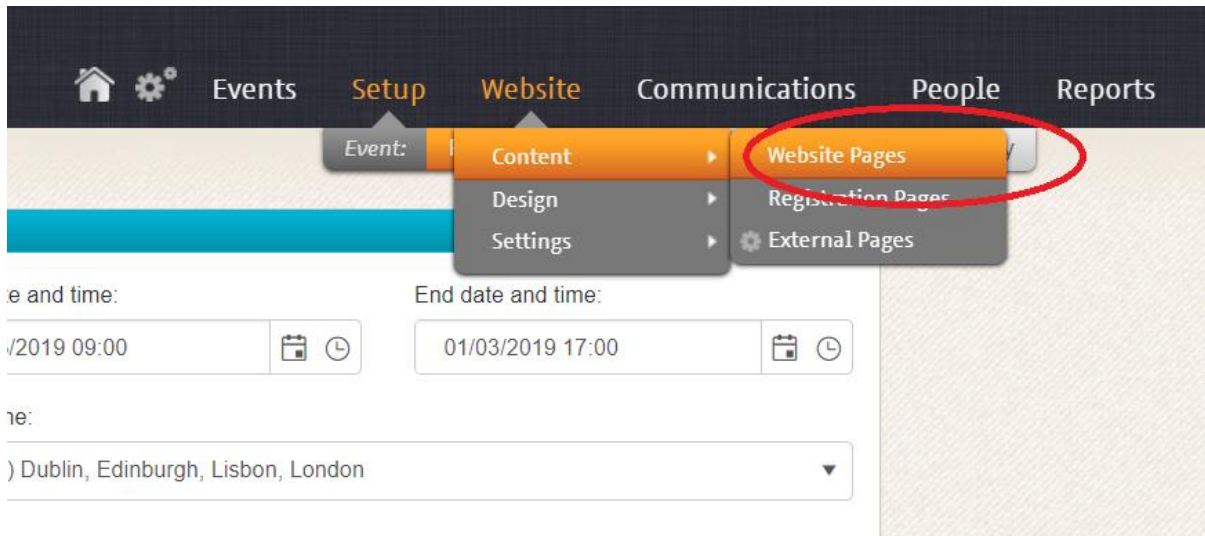
The screenshot shows the 'Properties' page for an event. The 'Details' section includes a 'Status' dropdown with 'Not Live' selected, 'Event name' field with '2 Templates - RS South Wales OR Discussion Society', and 'Event access groups' dropdown with 'RS - South Wales OR Discussion Society' selected. The 'Options' section includes 'Event Type' (Registration), 'Cost' (Free), and 'Action List' (None). The 'Start date and time' and 'End date and time' fields are circled in red, showing '01/03/2019 09:00' and '01/03/2019 17:00' respectively. The 'Event access groups' field is also circled in red.

At the bottom of the page, you can ensure that your group is selected correctly, indicated below in red circles. This ensures that theorsociety.com picks up your event and displays it on the correct pages.

The screenshot shows the 'Custom Event Fields' section. The 'Type of Event' dropdown is circled in red and shows 'RS / SIG Event'. The 'Regional Society' dropdown is circled in red and shows '3: South Wales'. The 'Special Interest Group' dropdown is also circled in red.

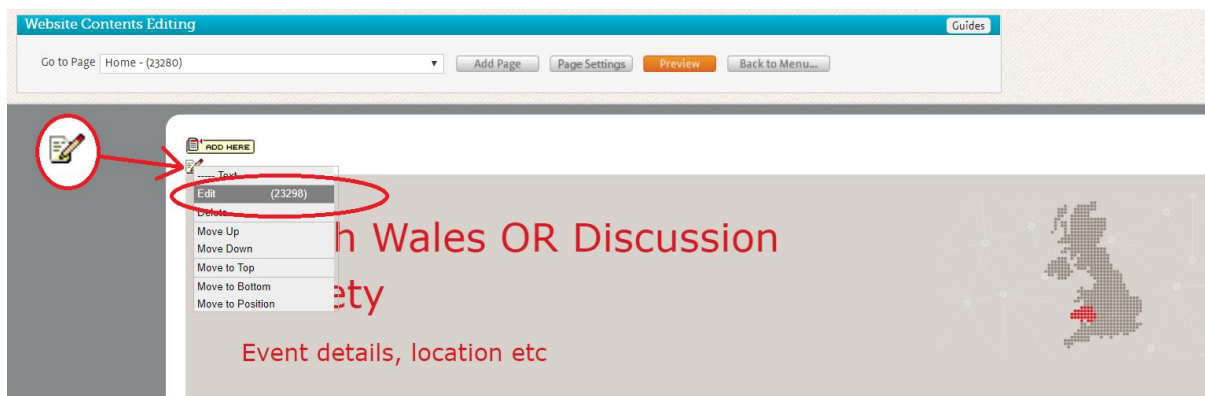
Website pages

Add the event information to your webpage by selecting 'Website', then 'Content' and then 'Website Pages'



Edit your banner text

Edit your banner text by hovering your mouse cursor over the 'pencil and paper' graphic, which will give you a drop-down menu. Select edit.

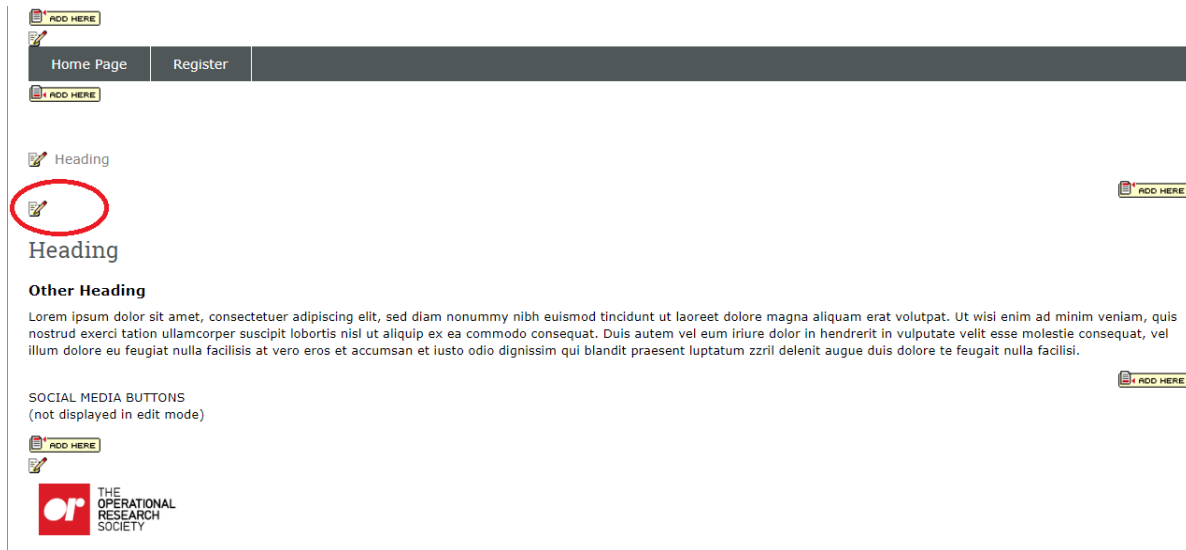


This will enable you to edit the text in the banner in a manner very similar to MS Word.

Select 'save'.

Edit your main text

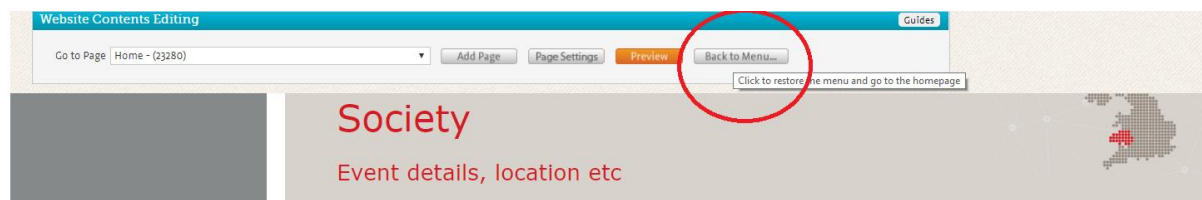
Edit your main text as the same way as the banner. Hover over the 'pencil and paper' graphic and make the changes to the text. Select 'save'.



The screenshot shows a website editor interface. At the top, there are navigation tabs for 'Home Page' and 'Register'. Below this, there are several 'ADD HERE' buttons. The main content area is titled 'Heading' and contains a paragraph of placeholder text. A red circle highlights a pencil and paper icon in the top left corner of the main content area. Another red circle highlights a 'Back to Menu...' button in the top right corner of the main content area. The bottom of the page features a logo for 'THE OPERATIONAL RESEARCH SOCIETY'.

Return to the setup pages

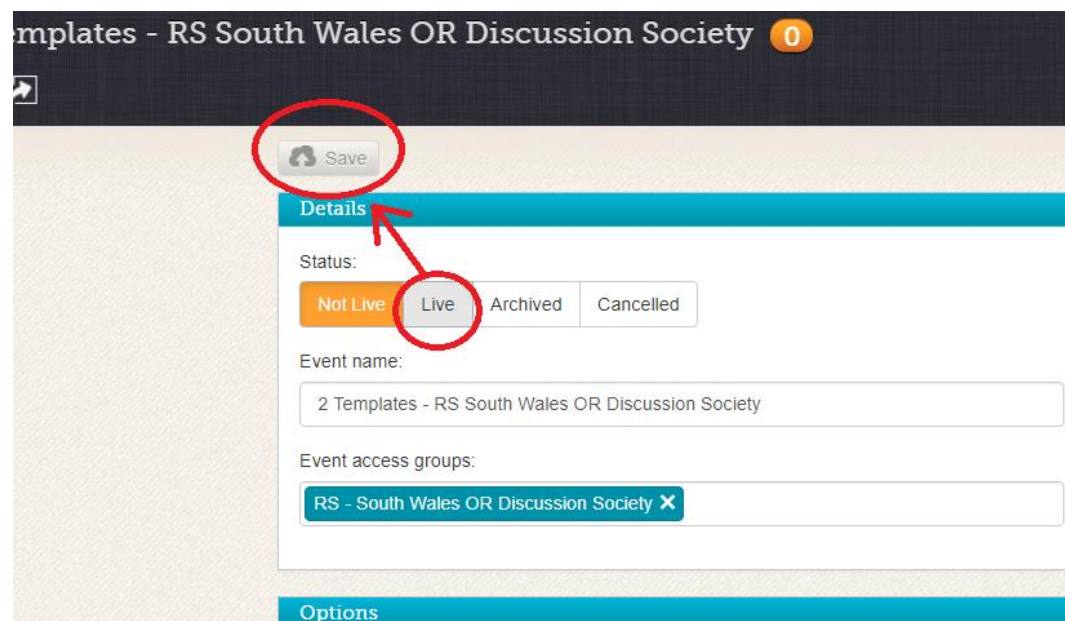
Return back to the main Eventsforce setup pages by selecting 'Back to menu'



The screenshot shows the 'Website Contents Editing' interface. At the top, there are navigation tabs for 'Website Contents Editing' and 'Guides'. Below this, there are several buttons: 'Go to Page', 'Home - (23280)', 'Add Page', 'Page Settings', 'Preview', and 'Back to Menu...'. A red circle highlights the 'Back to Menu...' button. A tooltip below the button reads 'Click to restore the menu and go to the homepage'. The main content area displays the text 'Society' and 'Event details, location etc'.

Make your event 'Live'

From the 'Setup' menu item, select 'Event' and then 'Properties'. Then select the 'Live' option on the left and then 'Save' at the top of the page. Your event will now appear on the main OR Society website.



The screenshot shows the 'Event Properties' page. At the top, there is a header for 'Templates - RS South Wales OR Discussion Society' with a notification icon. Below this, there is a 'Save' button with a red circle around it. The main content area is titled 'Details' and contains a 'Status:' section with four buttons: 'Not Live', 'Live', 'Archived', and 'Cancelled'. A red circle highlights the 'Live' button, and a red arrow points from the 'Save' button to the 'Live' button. Below the status section, there is an 'Event name:' field with the text '2 Templates - RS South Wales OR Discussion Society'. At the bottom, there is an 'Event access groups:' section with a dropdown menu showing 'RS - South Wales OR Discussion Society' with a close button.