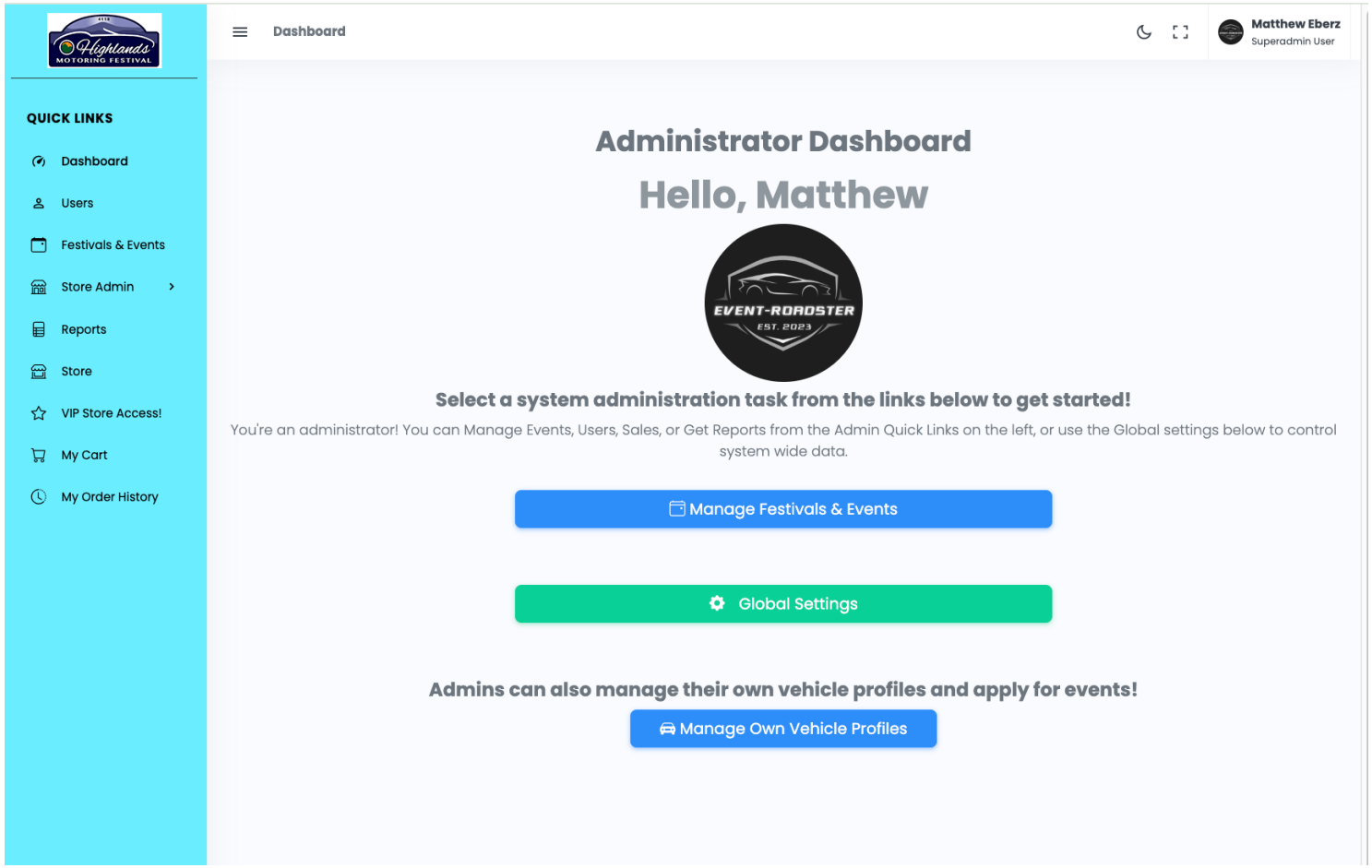
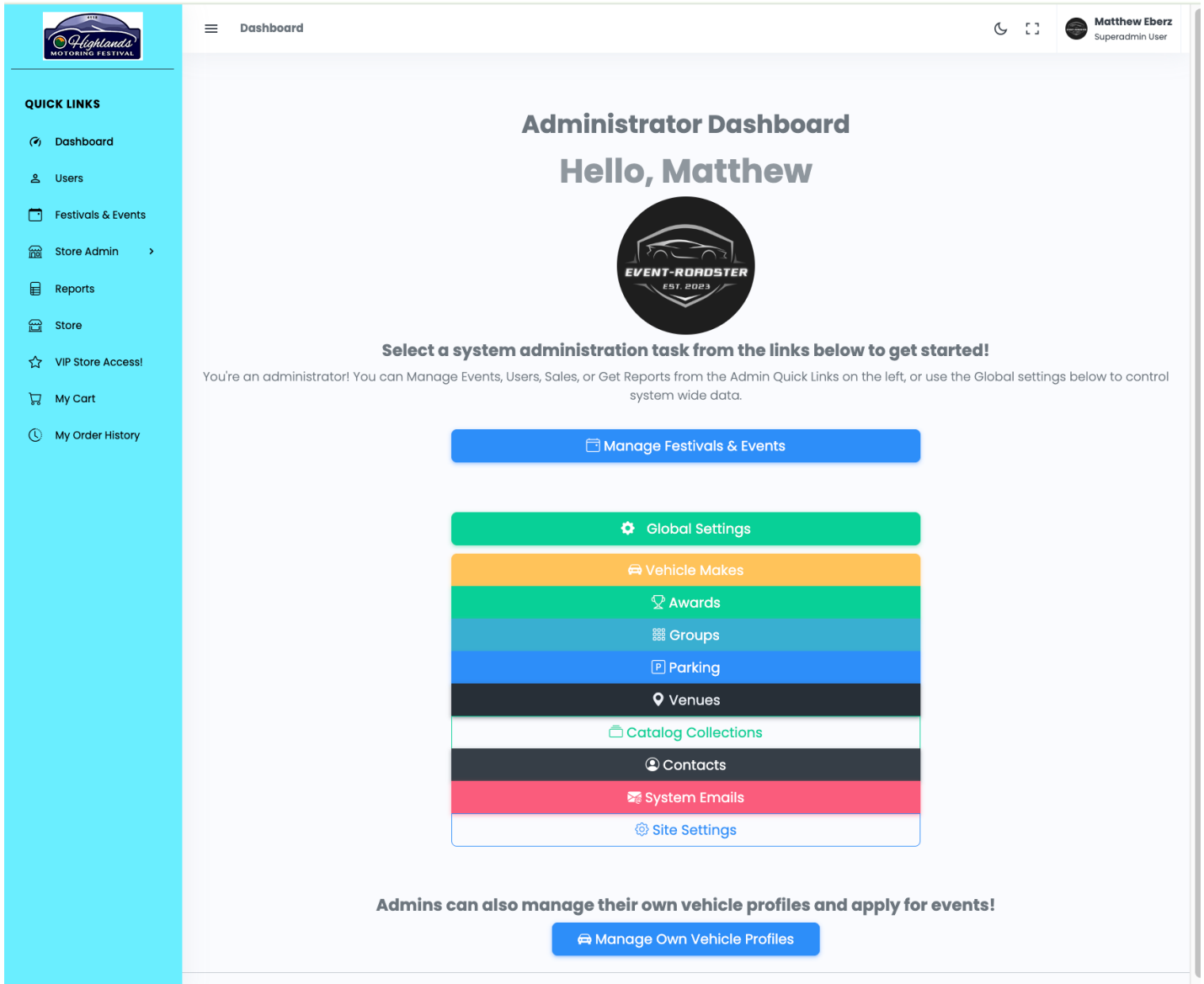


EVENT-ROADSTER V3.2

Version 3.0 – Major release: Trailer Management, email to all, hierarchical presentation
Version 3.1 – Major release: Volunteer/Teams, Impersonation
Version 3.2 – Major release: User System Addition

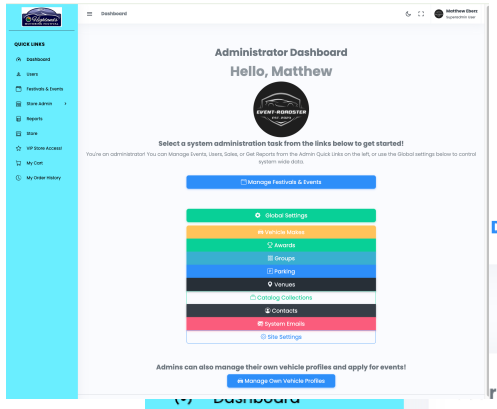
Contents

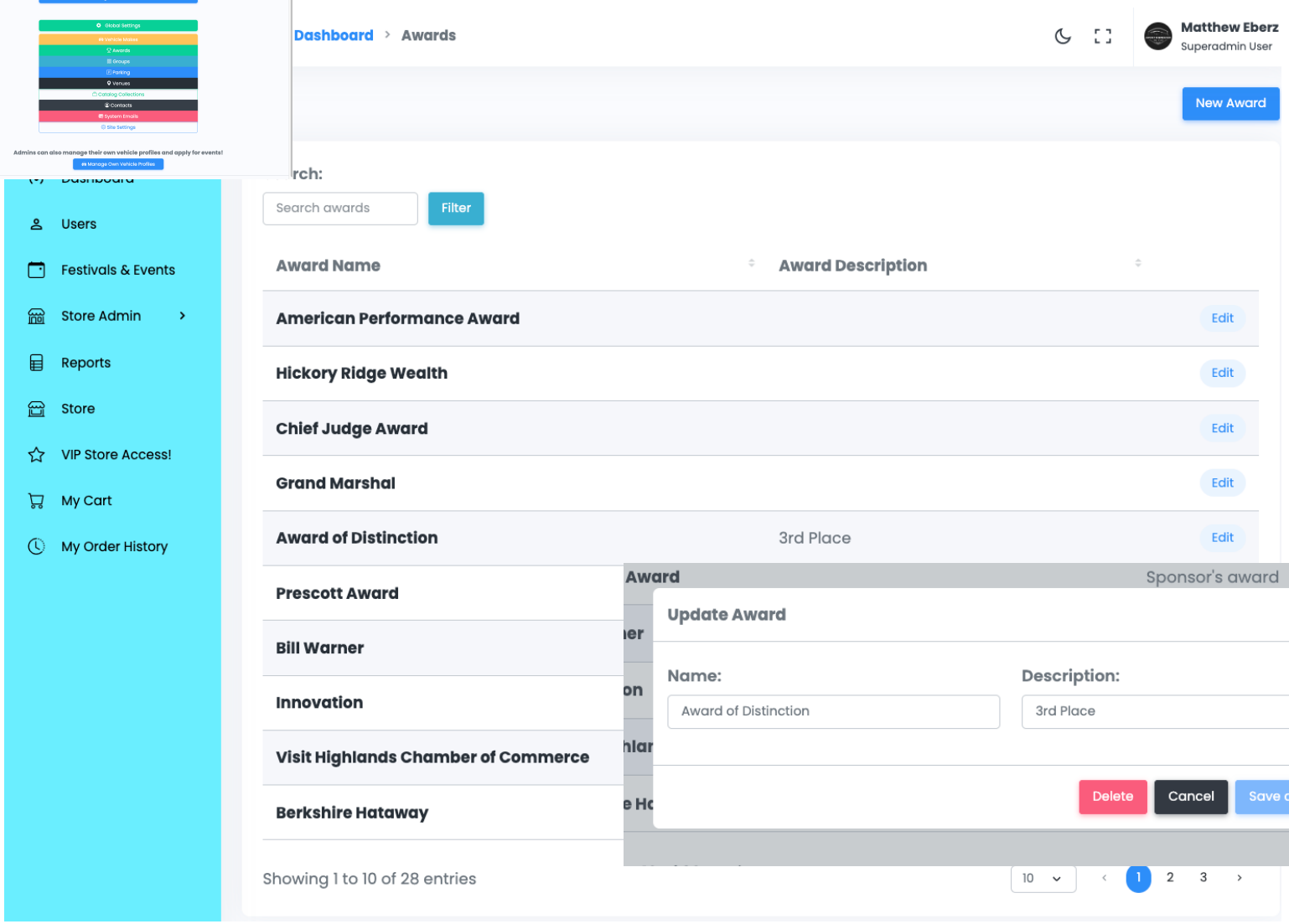
- Global Data 3 – 6
- User Management 7 – 12
- Car Show 13 – 26
- Trailer 27 - 28
- Event/One Lap Tickets & Participants 29 -31
- Store 32 – 35
- Tickets 36 – 37
- Report 38
- Patron 39 -40



Repository for GLOBAL data, which can be used from year to year, event to event. Access by Admin. Site Settings only access by Super Admin.

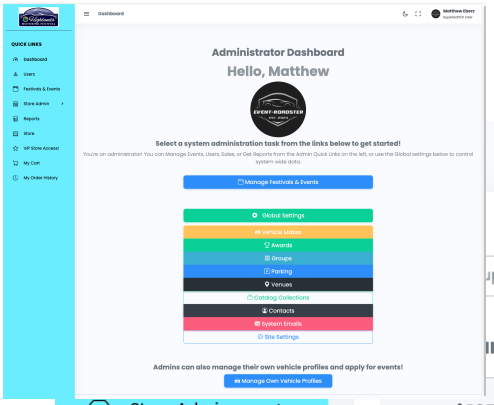
Global Data

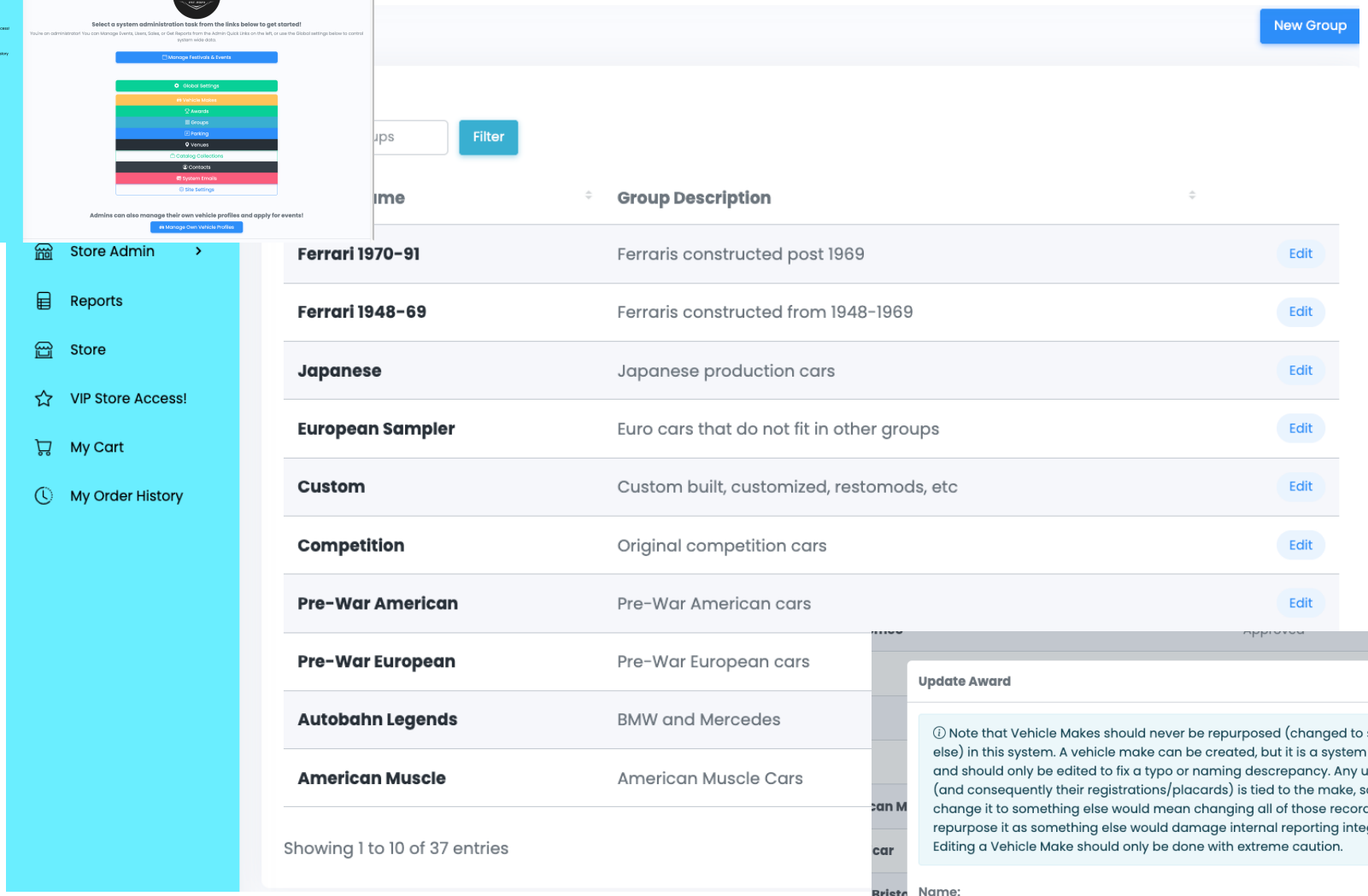


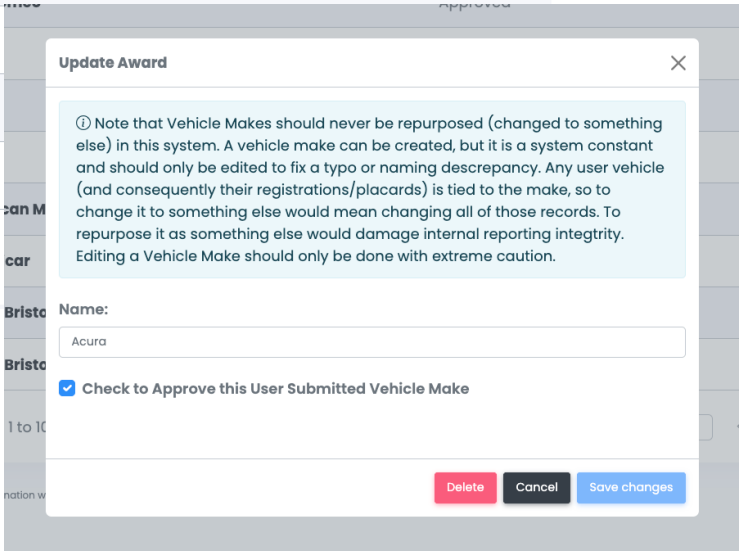


Global Events: awards available for any festival any event. Notice there is no Delete function.

Global Data

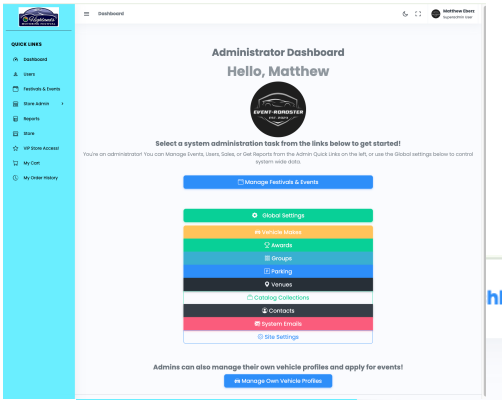






Global Vehicles: Vehicle type available for any festival any event. Notice there is no Delete function.

Global Data



hboard › Parking Options

Matthew Eberz
Superadmin User

New Parking Option

QUICK LINKS

- Dashboard
- Users
- Festivals & Events
- Store Admin
- Reports
- Store
- VIP Store Access!
- My Cart
- My Order History

Search:

Search parking opto | Filter

Parking Area Name	Parking Area Description	Spaces Available	
Highlands School	Highlands School	20	Edit
No Report	Not filled out yet	0	Edit
Wilson Lot Parking	Hickory Street	20	Edit

Showing 1 to 3

Server-side pagination w

Update Parking Area

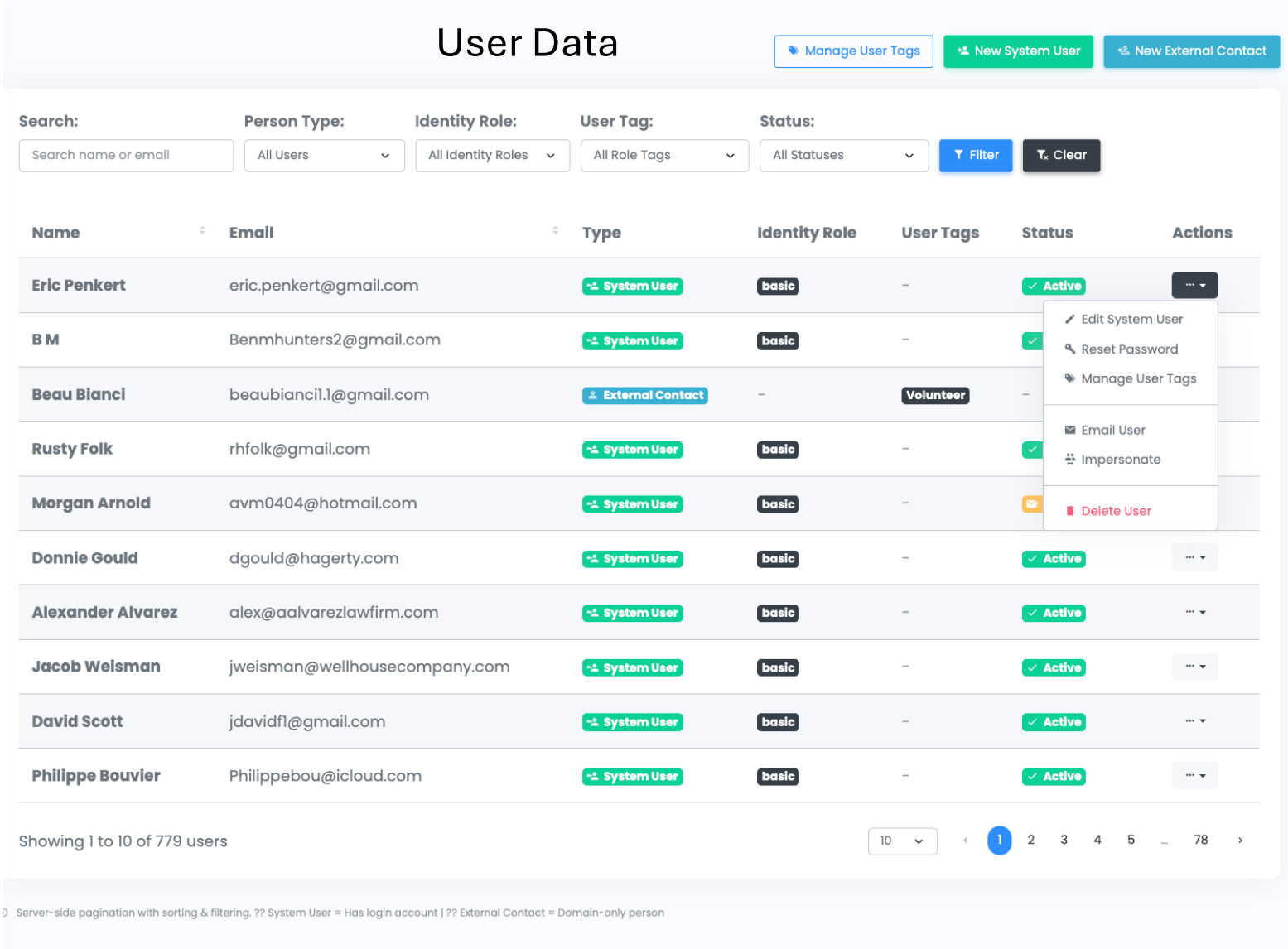
Name: Highlands School

Description: Highlands School

SpacesAvailable: 20

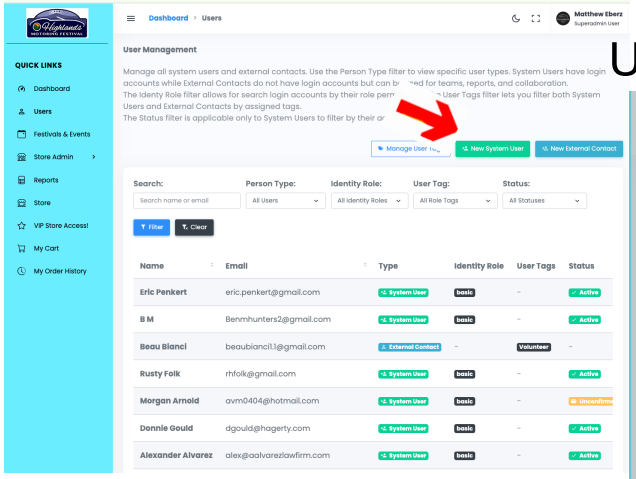
Delete | Cancel | Save changes

Global Parking: Information is editable, cannot be deleted

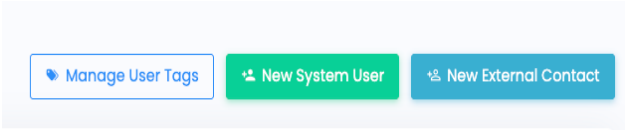


User screen is the “One Window” for managing users & contacts. Search by any name, tag, role, status, manage tags and create new contact and users from here. Home for all System Users and External Contacts (Cannot log onto the system). Notice the “Actions” button that enables editing the user, resetting their password, managing Tags, email, and enable Admin to impersonate the user for sales or editing.

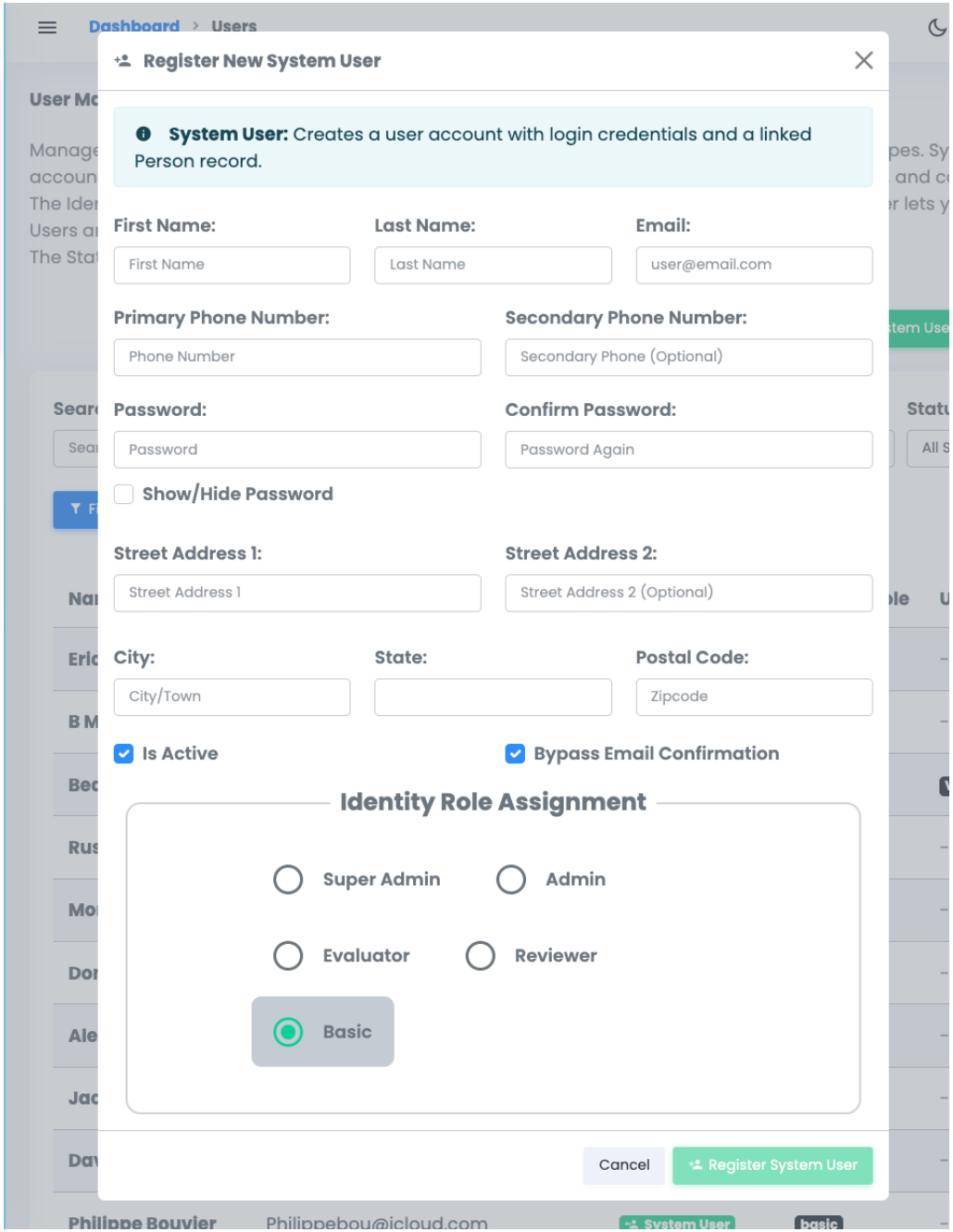
User Data



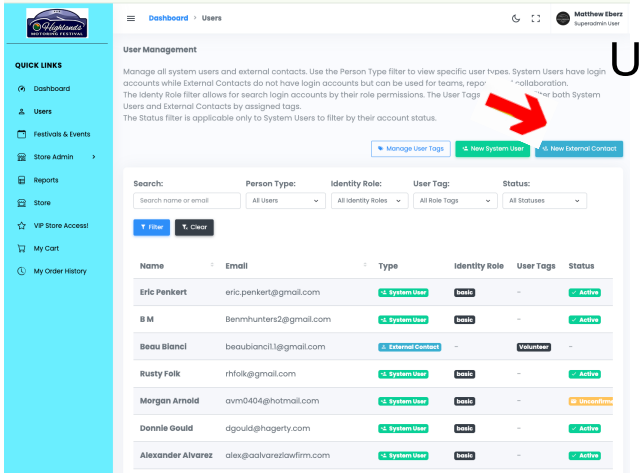
Create a new System User here, edit the user by clicking “New System User” button



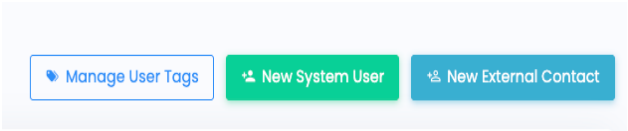
Notice the User Types: **Super Admin** (Limited to ER Developers) and provides System Access. **Admin** (has access to all areas except System Access). **Evaluator**(There are subsection, such as Judging, that requires “admin-type” privileges such as editing and data entry. Their ”admin-type” privileges are restricted to their work section. **Reviewer** (Can log onto the system and “see” everything, can print reports, but cannot edit or add data). **Basic** (Is a patron who can log onto the system and purchase and/or make an application.)



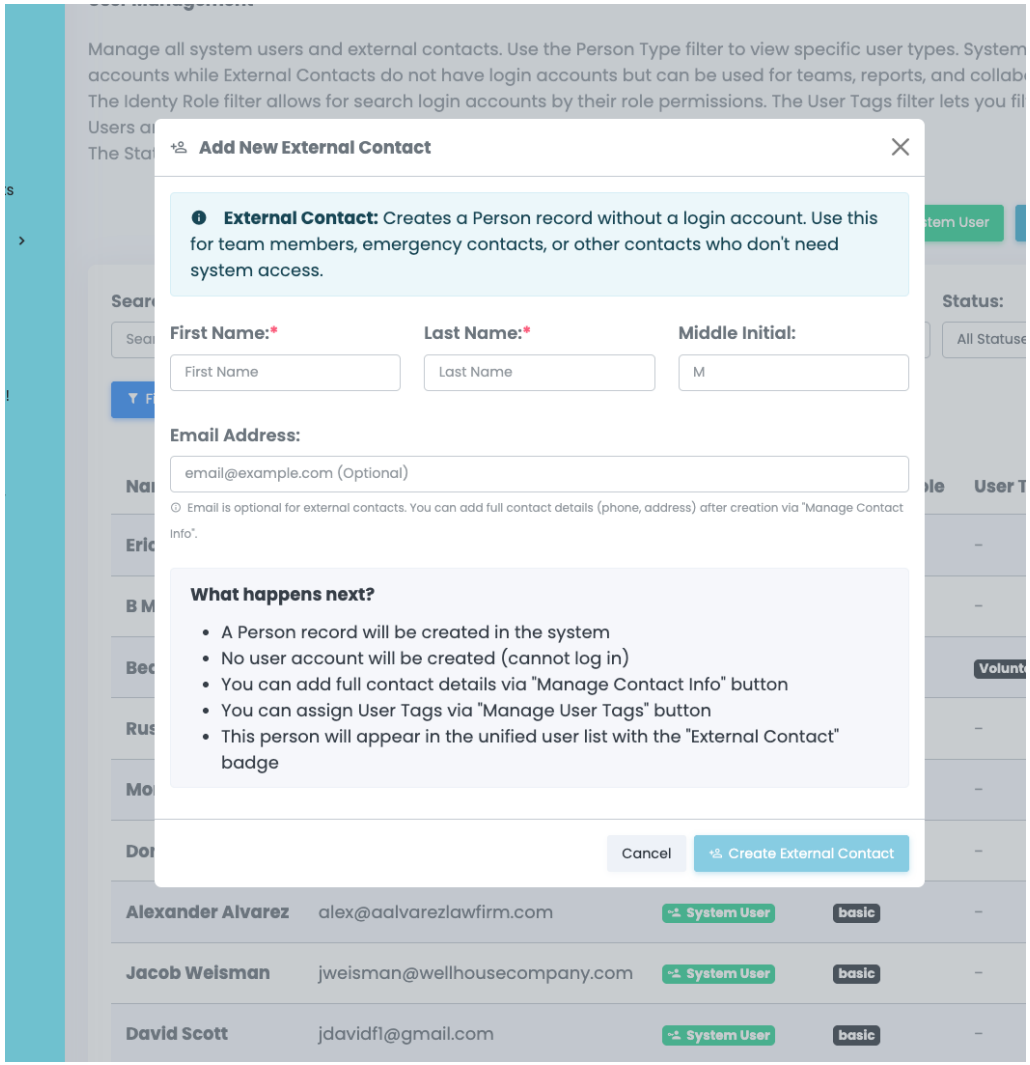
User Data



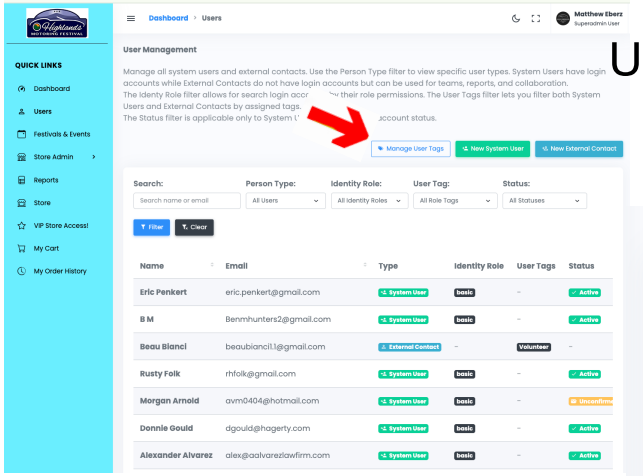
Create a new External Contact here, edit the user by clicking “New External Contact” button



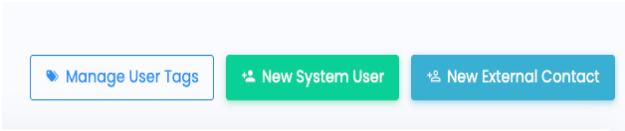
This is a simple data entry screen at add a contact. Contacts are not system users and are part of the system for reference purposes, making teams, and listing vendors and other support organizations. (Version 3.X will add a phone number to the record.)



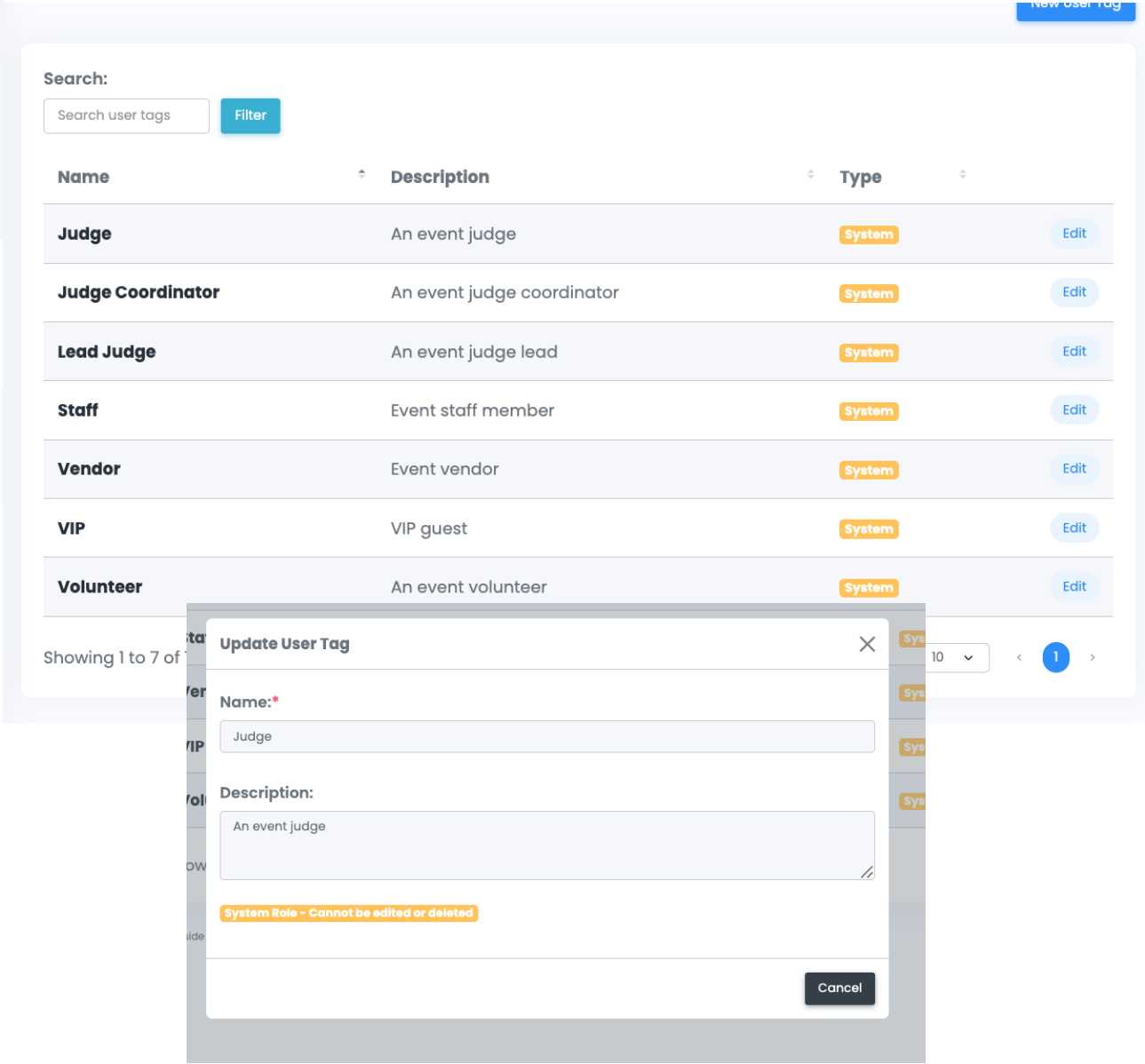
User Data. - Teams



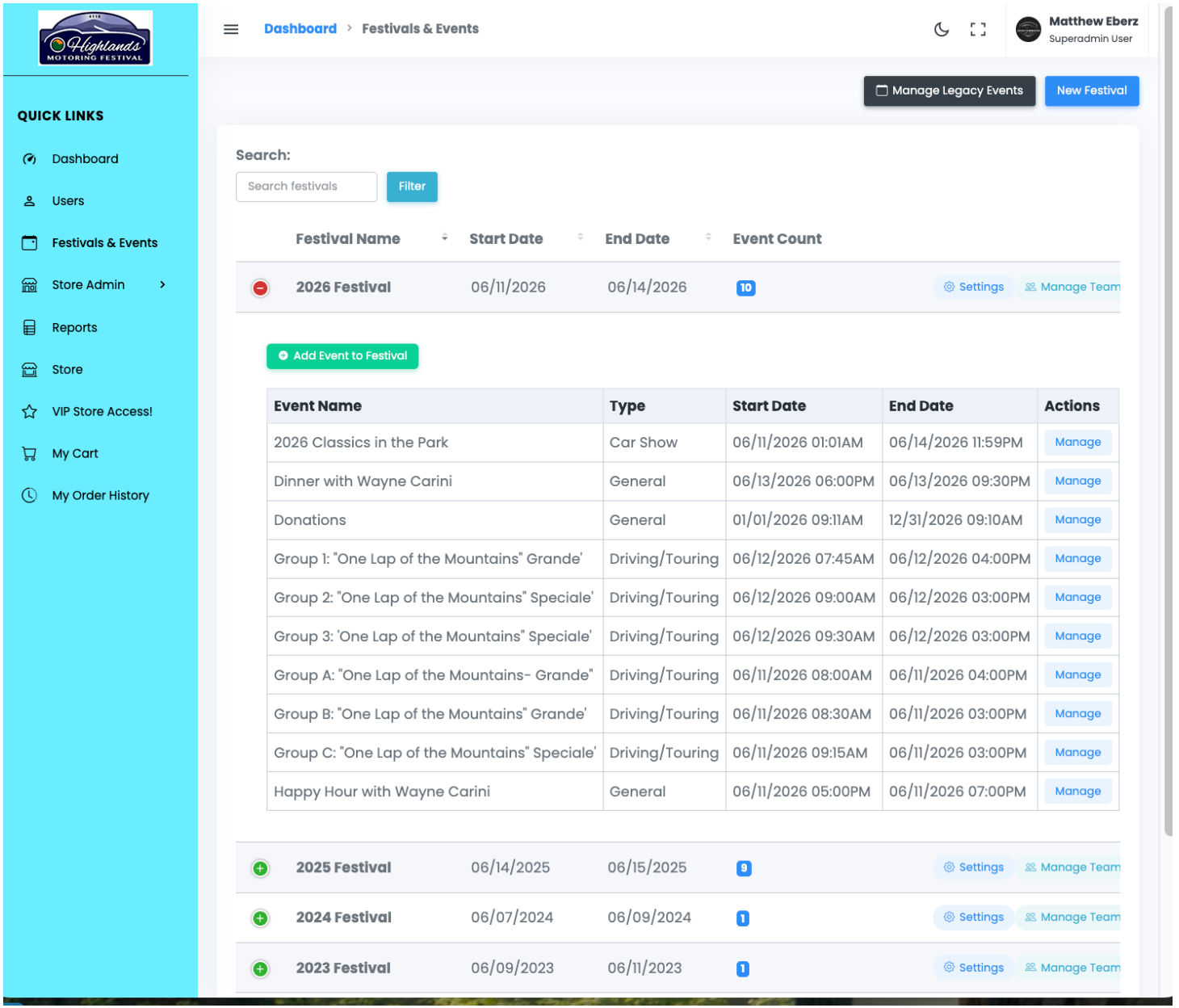
Manage Tags by clicking the “Manage User Tags” button



This is a simple data entry screen at add a Tag. Tags are used to limit access of System Users to specific work areas. They are also use to enable External Contacts access to specific areas such as VIP sales. Tags enable sorting user lists by work functions, e.g. Volunteers.

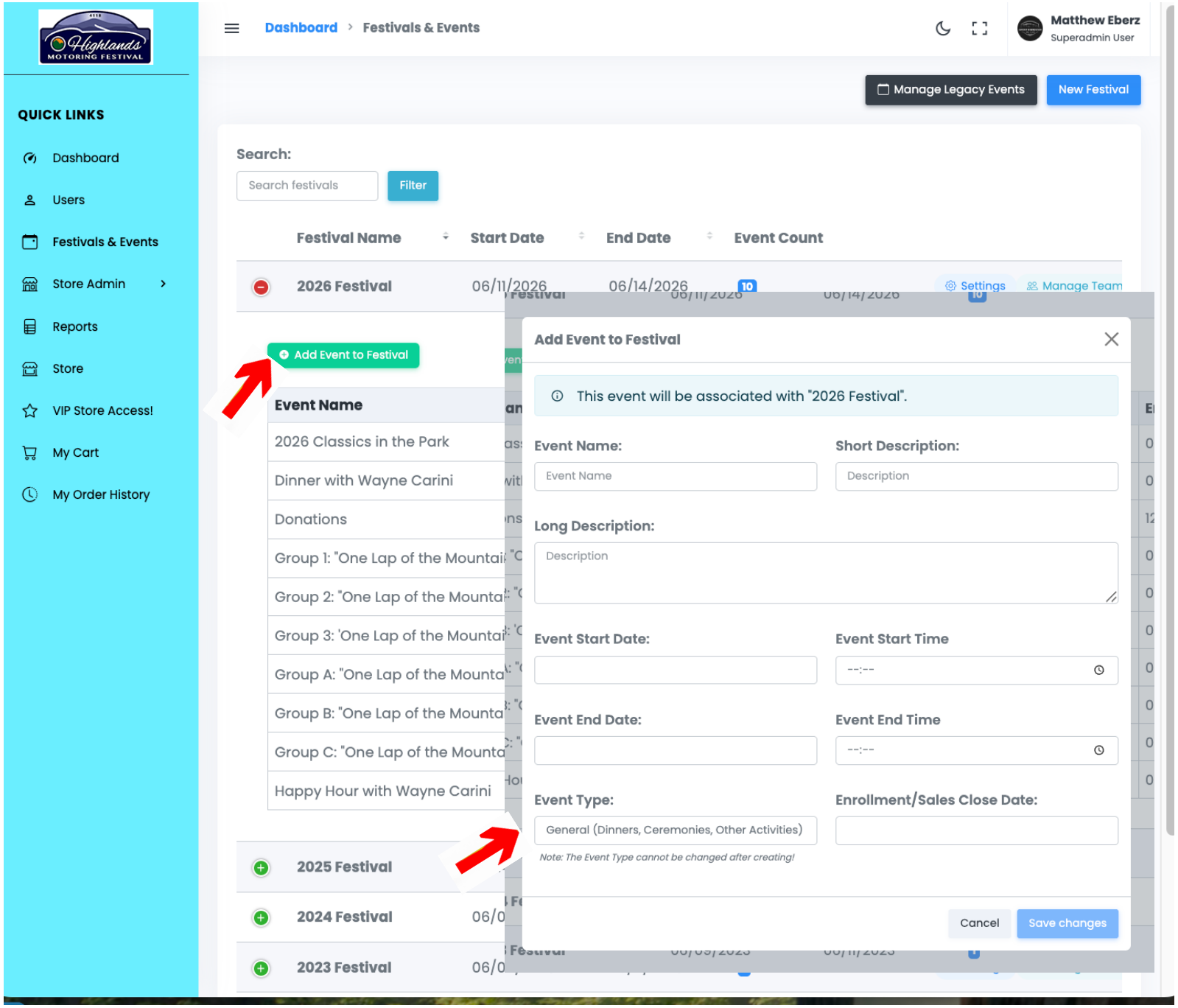


Festival



Hierarchical listing of the Festivals and Event. Version 3.0 changed the organization structure to having a “Festival” with associated events. This enables presenting all the data in “One Window.”

The Event – The Type

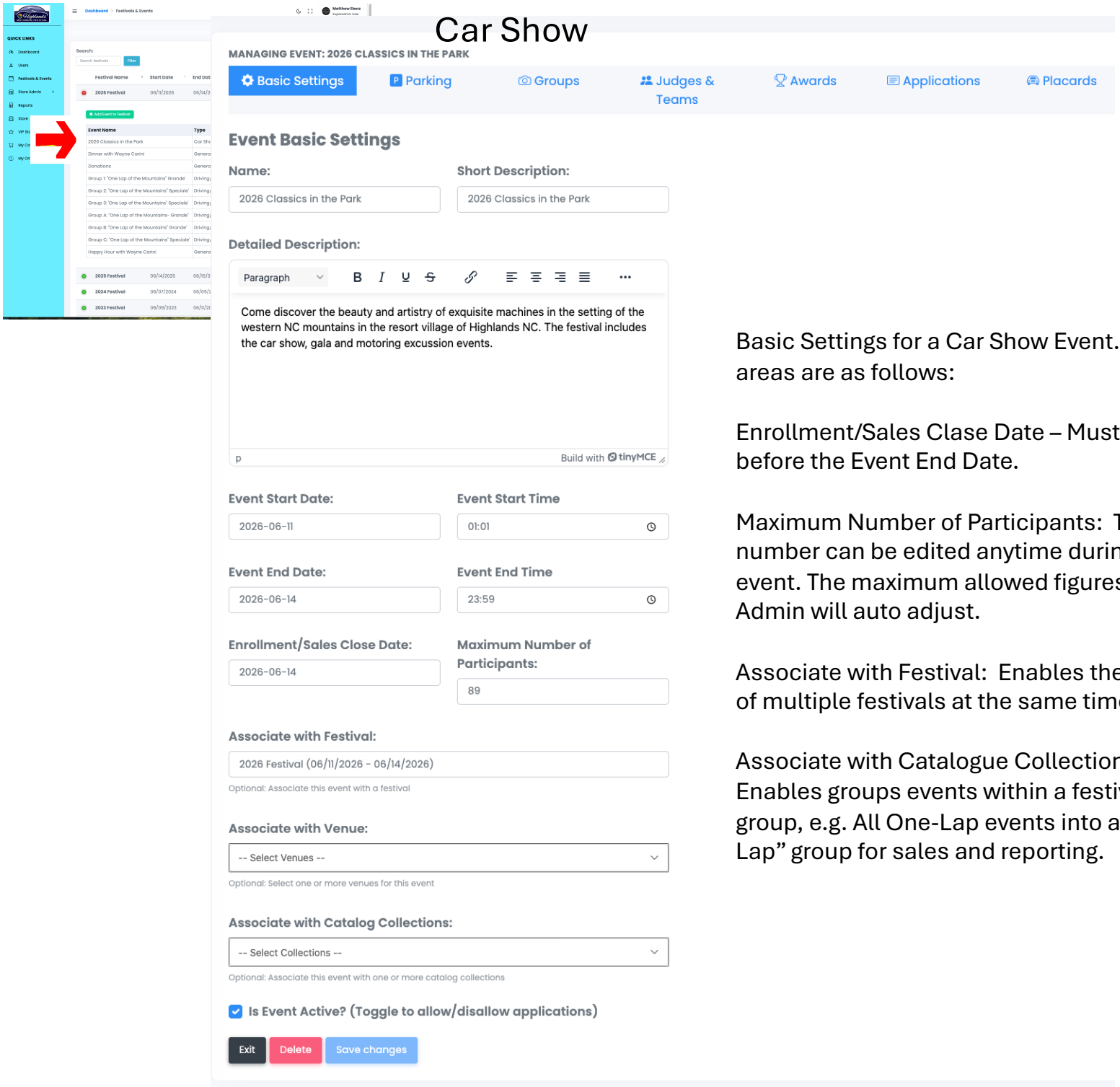


When creating an event the entry is ”Event Type:”

This cannot be changed after the event is saved.

The Event Type chosen dictates the following data entry screens which are different for the type of events.

Car Show



Basic Settings for a Car Show Event. The key areas are as follows:

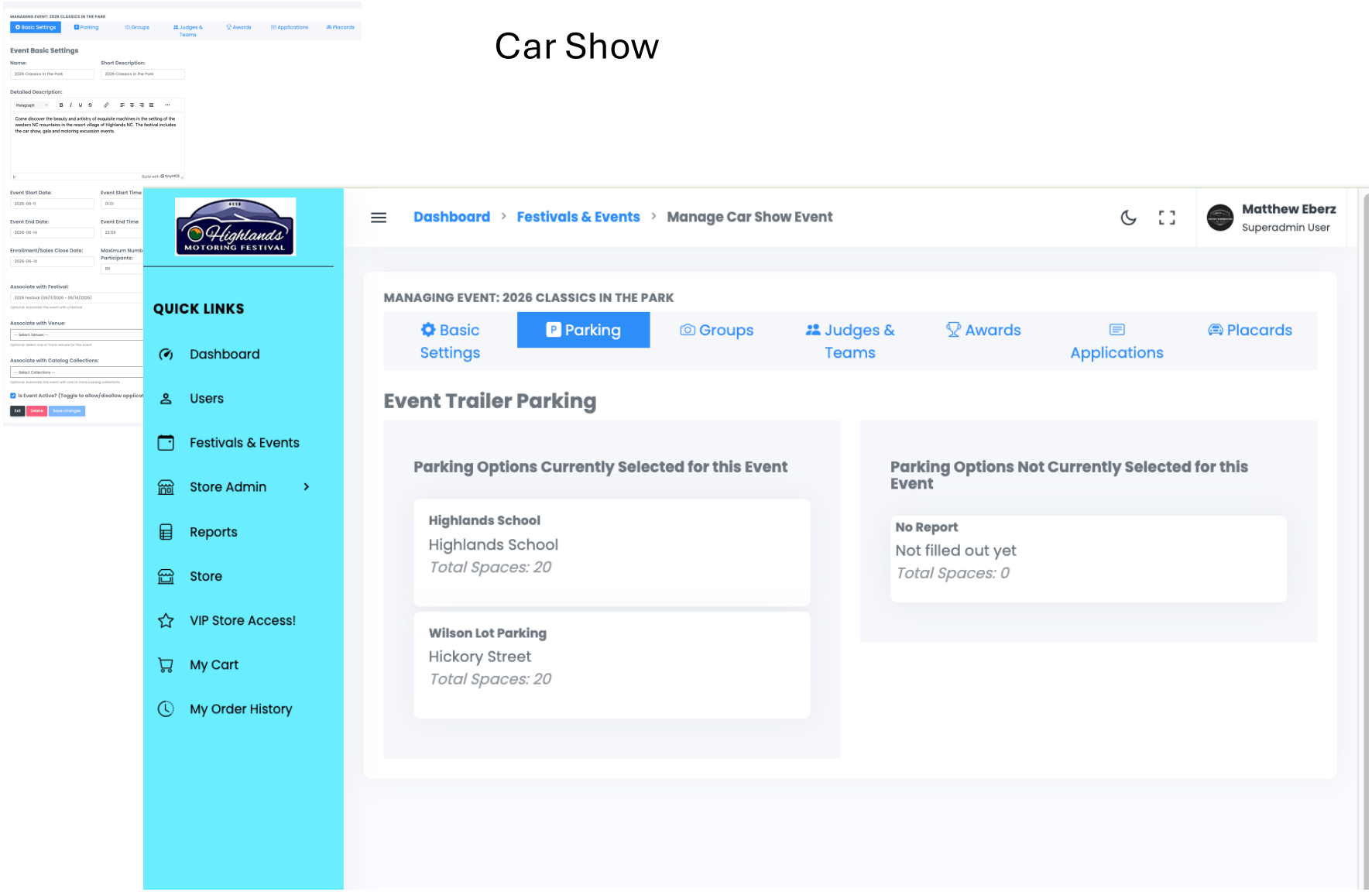
Enrollment/Sales Clase Date – Must be on or before the Event End Date.

Maximum Number of Participants: This number can be edited anytime during the event. The maximum allowed figures in Sales Admin will auto adjust.

Associate with Festival: Enables the conduct of multiple festivals at the same time.

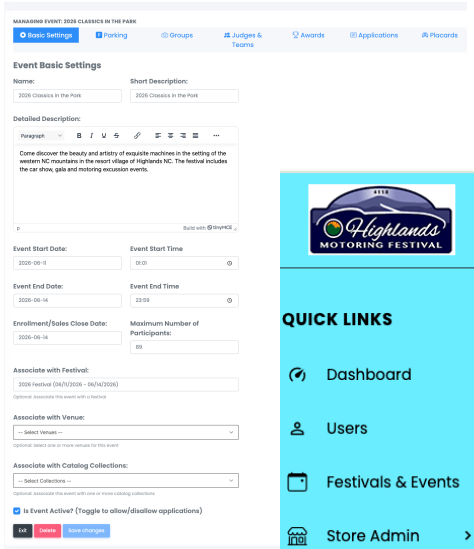
Associate with Catalogue Collections: Enables groups events within a festival into a group, e.g. All One-Lap events into a “One-Lap” group for sales and reporting.

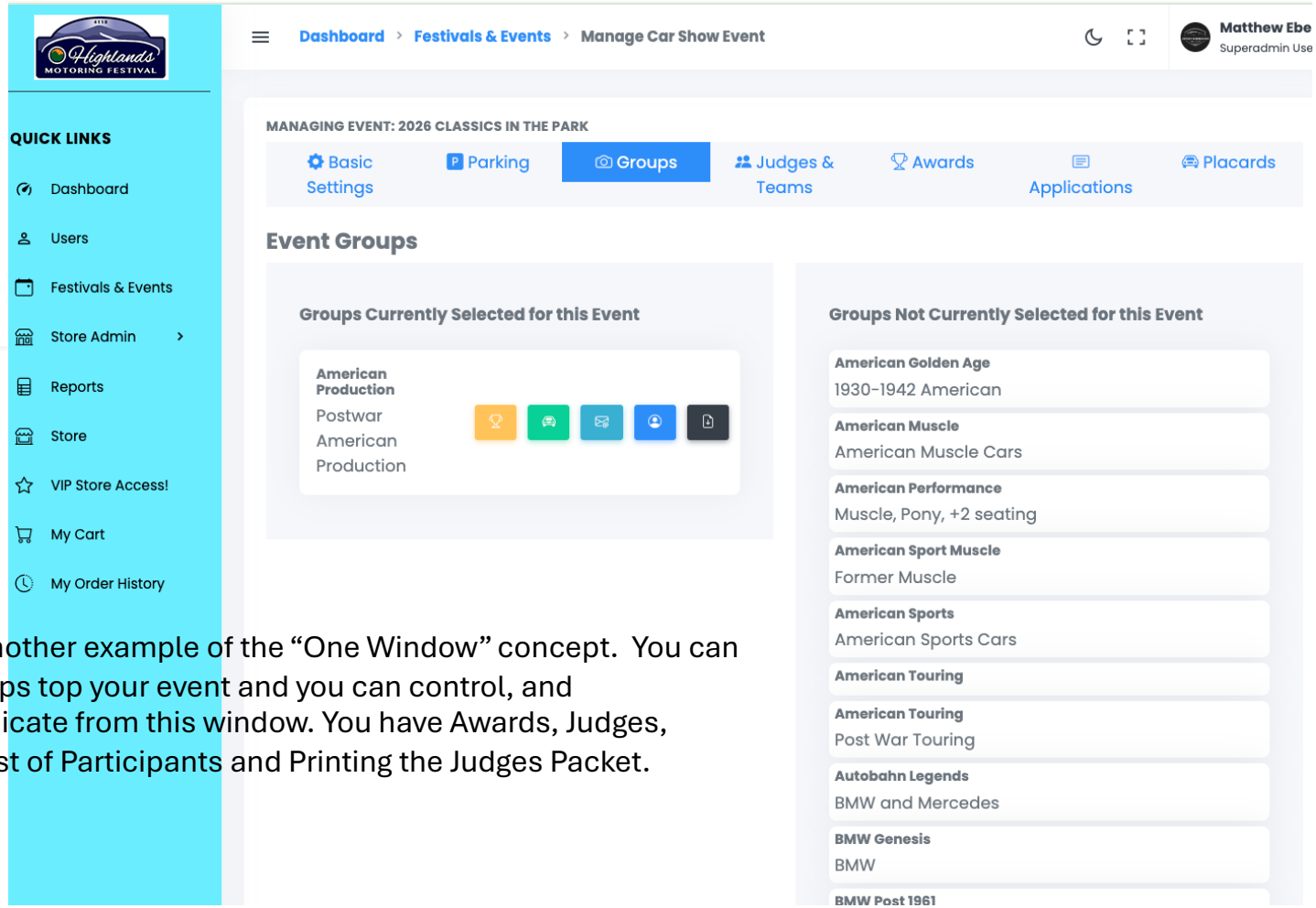
Car Show



This is a Drag and Drop process, drag an available parking place from “Parking Options Not Currently Selected” and drop it into “Parking Options Currently Selected” You can add more parking option by adding them into the Global Parking tab.

Car Show

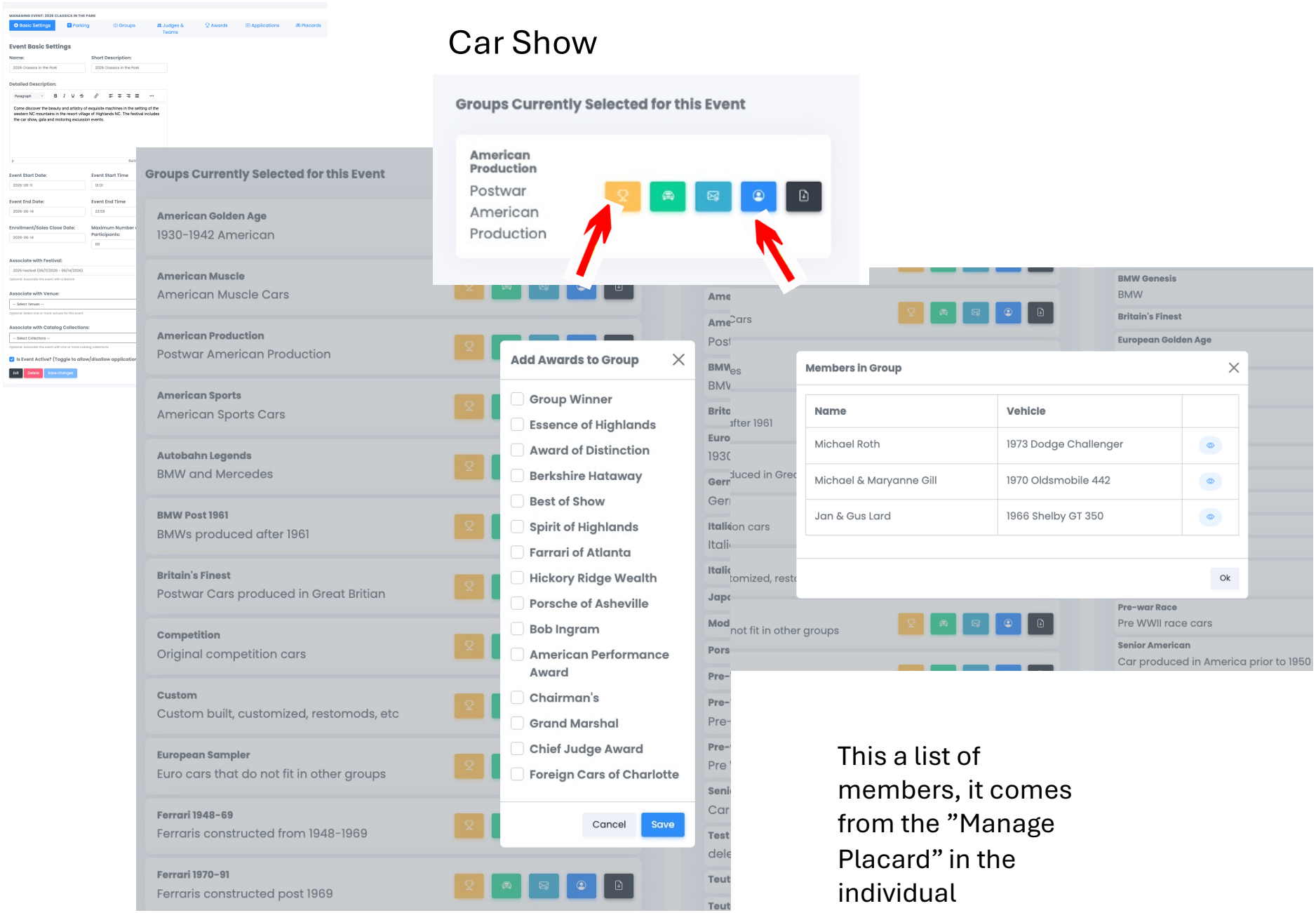




This is another example of the “One Window” concept. You can add groups top your event and you can control, and communicate from this window. You have Awards, Judges, Email, List of Participants and Printing the Judges Packet.

This is a Drag and Drop process, drag an available groups from “Groups Not Currently Selected” and drop it into “Groups Currently Selected” You can add more Group by adding them into the Global Groups tab.

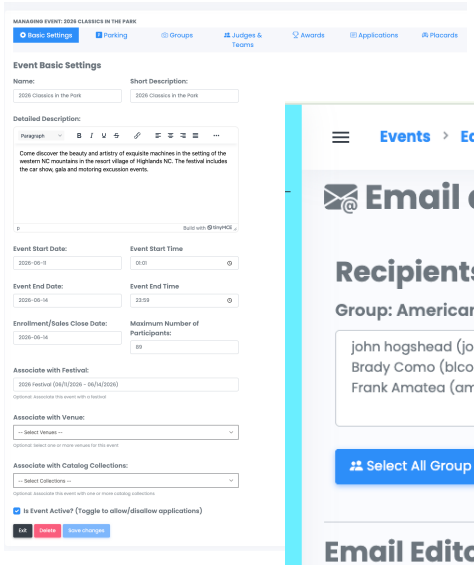
Car Show

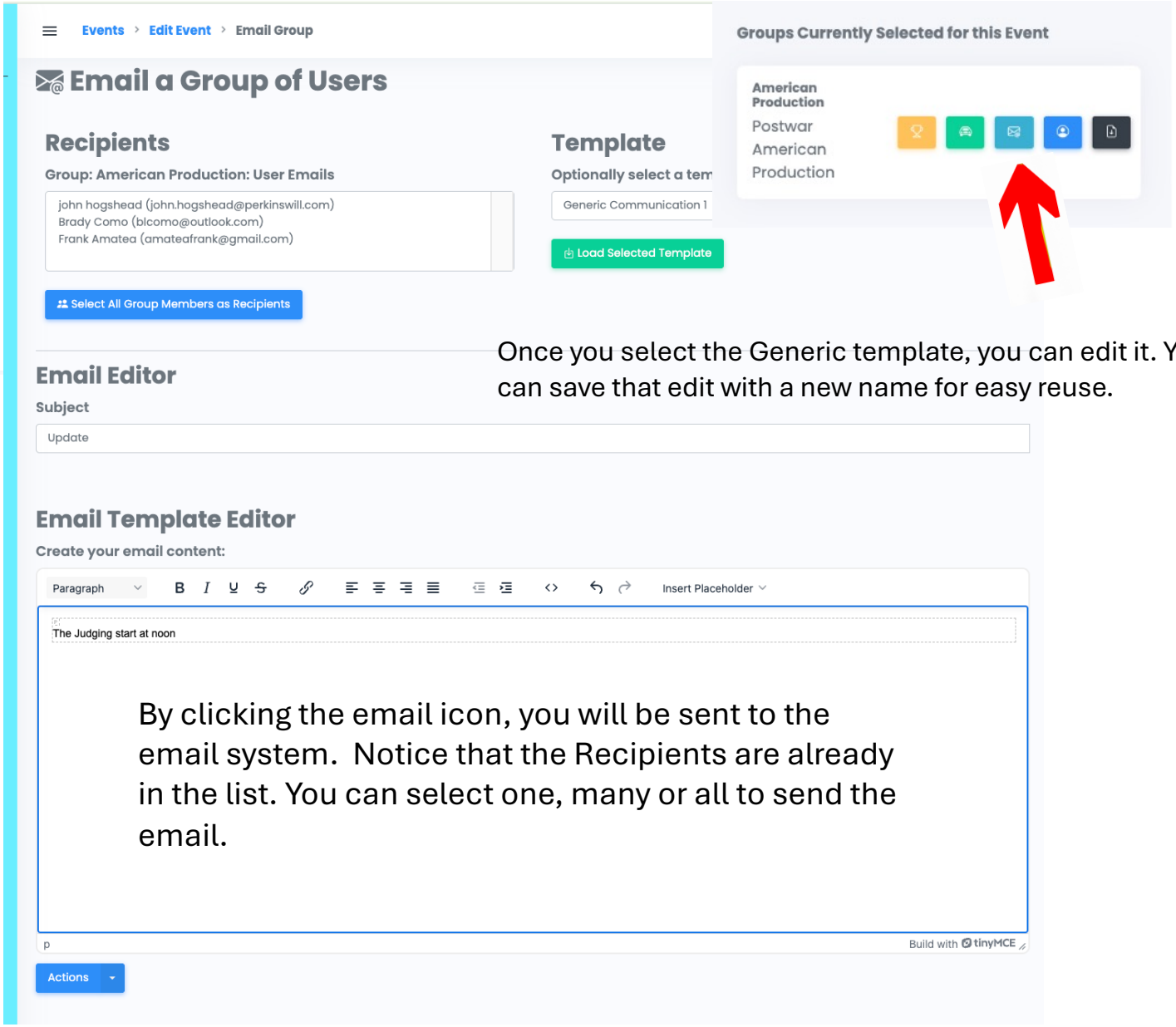


Add Awards to the group. This is a list from which the Judges an chose the award. The list is provided for the Group by creating the list in the Event Awards tab.

This a list of members, it comes from the ”Manage Placard” in the individual participant’s records

Car Show

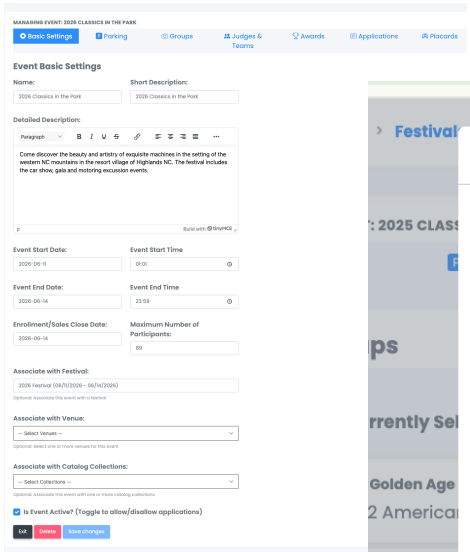


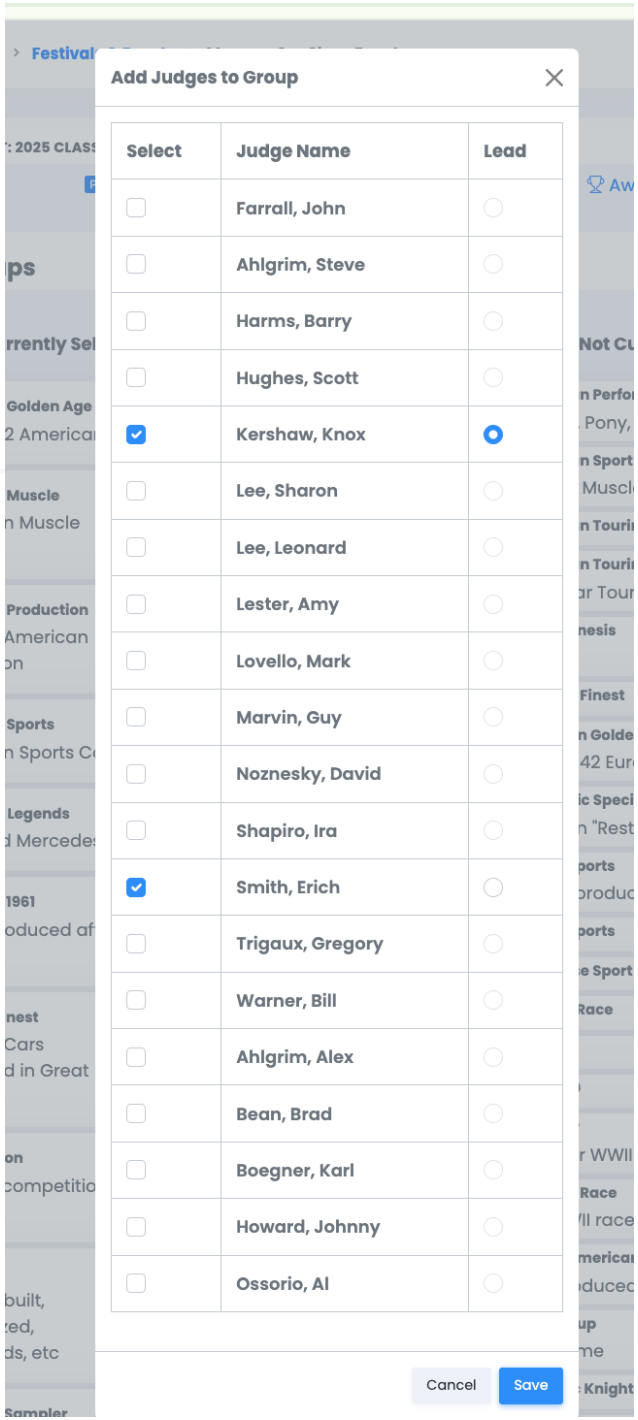


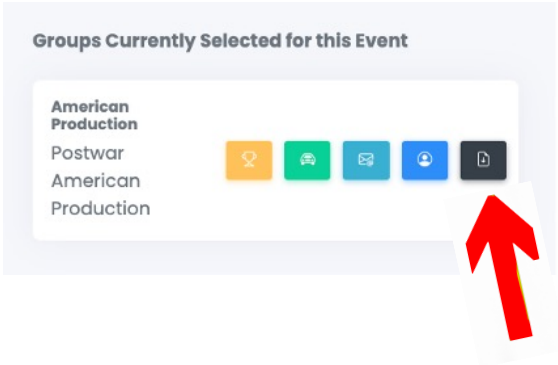
Once you select the Generic template, you can edit it. You can save that edit with a new name for easy reuse.

By clicking the email icon, you will be sent to the email system. Notice that the Recipients are already in the list. You can select one, many or all to send the email.

Car Show

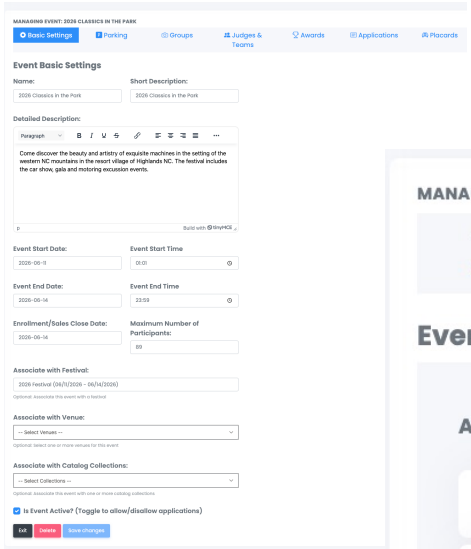


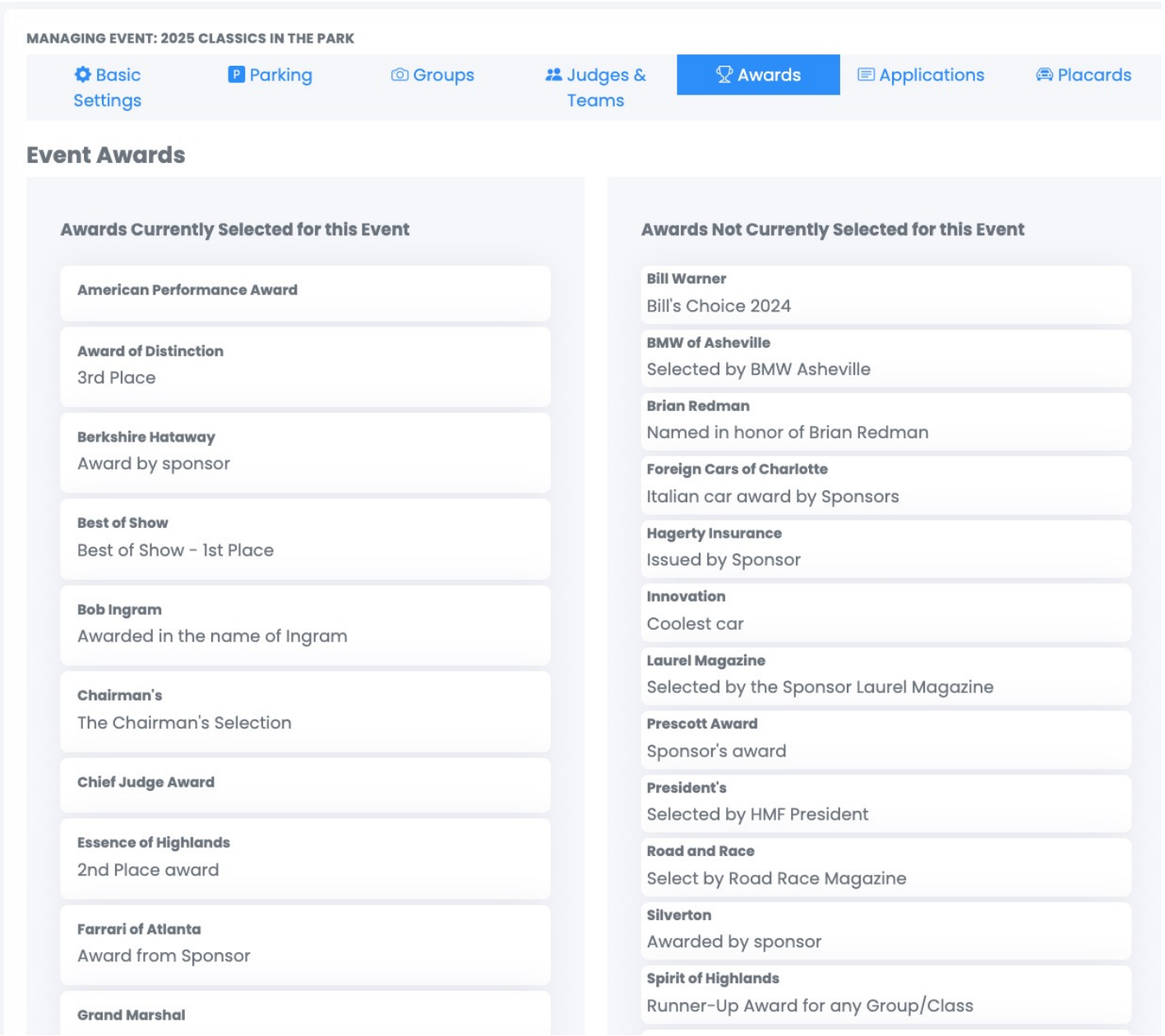




By clicking the black icon, you will be be presented with list of available judges. If there is person missing from the list, you can enter one by selecting the individual in the User Window and give them the “Judge” tag. REMEMER, if the judge needs to enter information into the system, then they need to have the Identity Role of “Evaluator”. If the Judge does not need to enter data the Identity Role of ”Reviewer” is sufficient.

Car Show

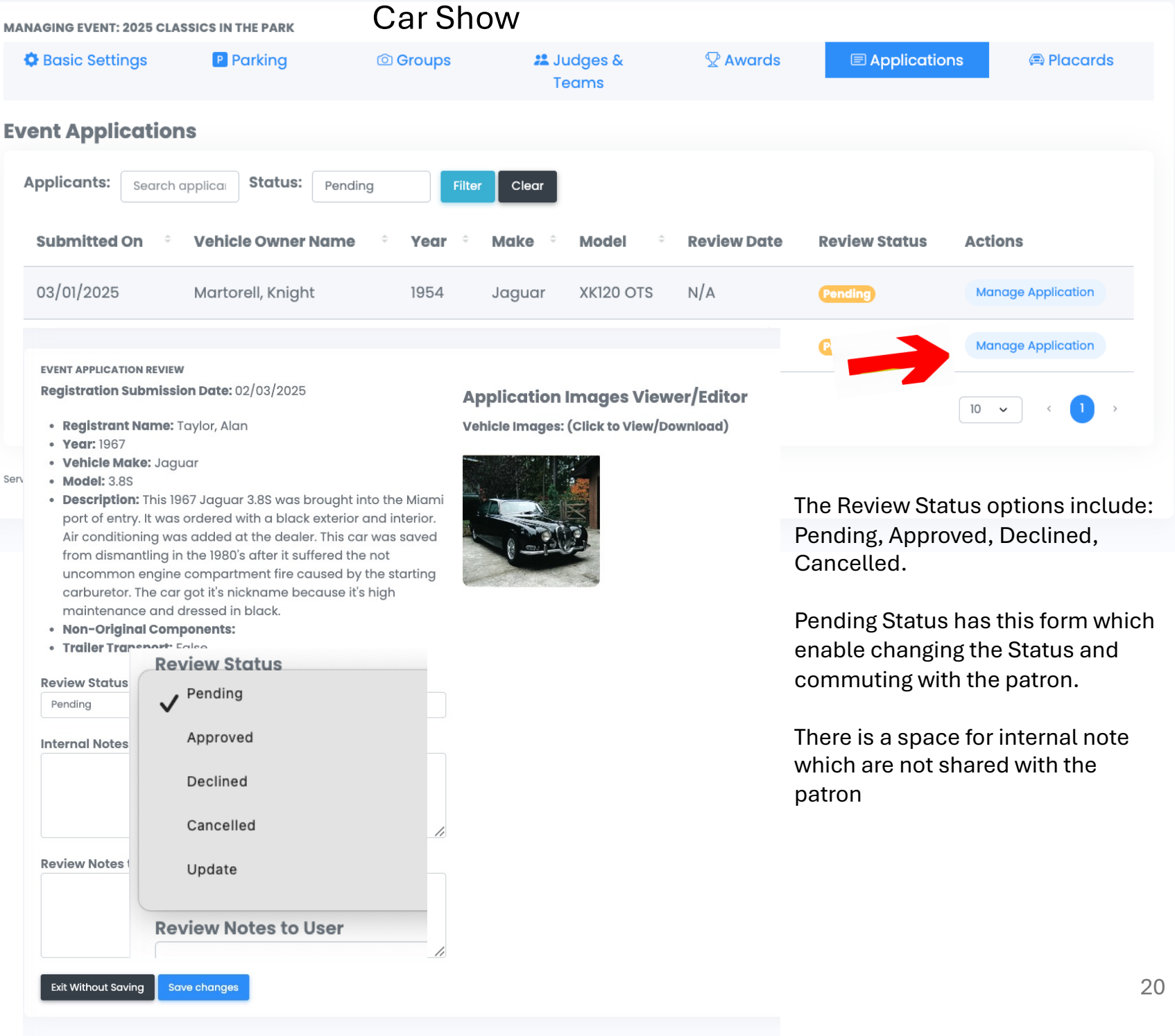




This is a list of the award that may be selected for the entire event. The Groups Event Tab will be presented this list and select the possible awards for the group.

Awards can be add to the “Award Not Currently Select” list in the Global section.

Car Show

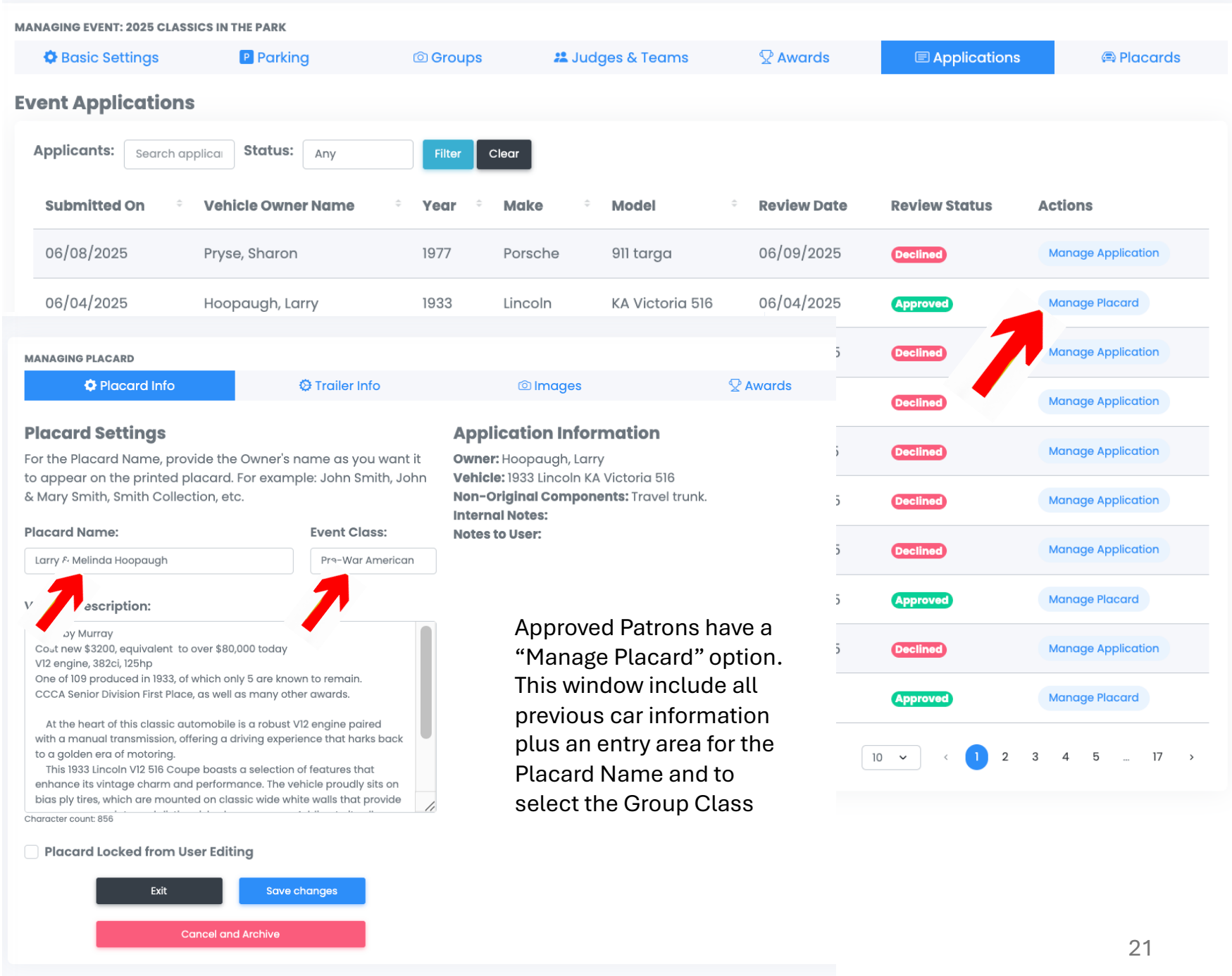


The Review Status options include: Pending, Approved, Declined, Cancelled.

Pending Status has this form which enable changing the Status and commuting with the patron.

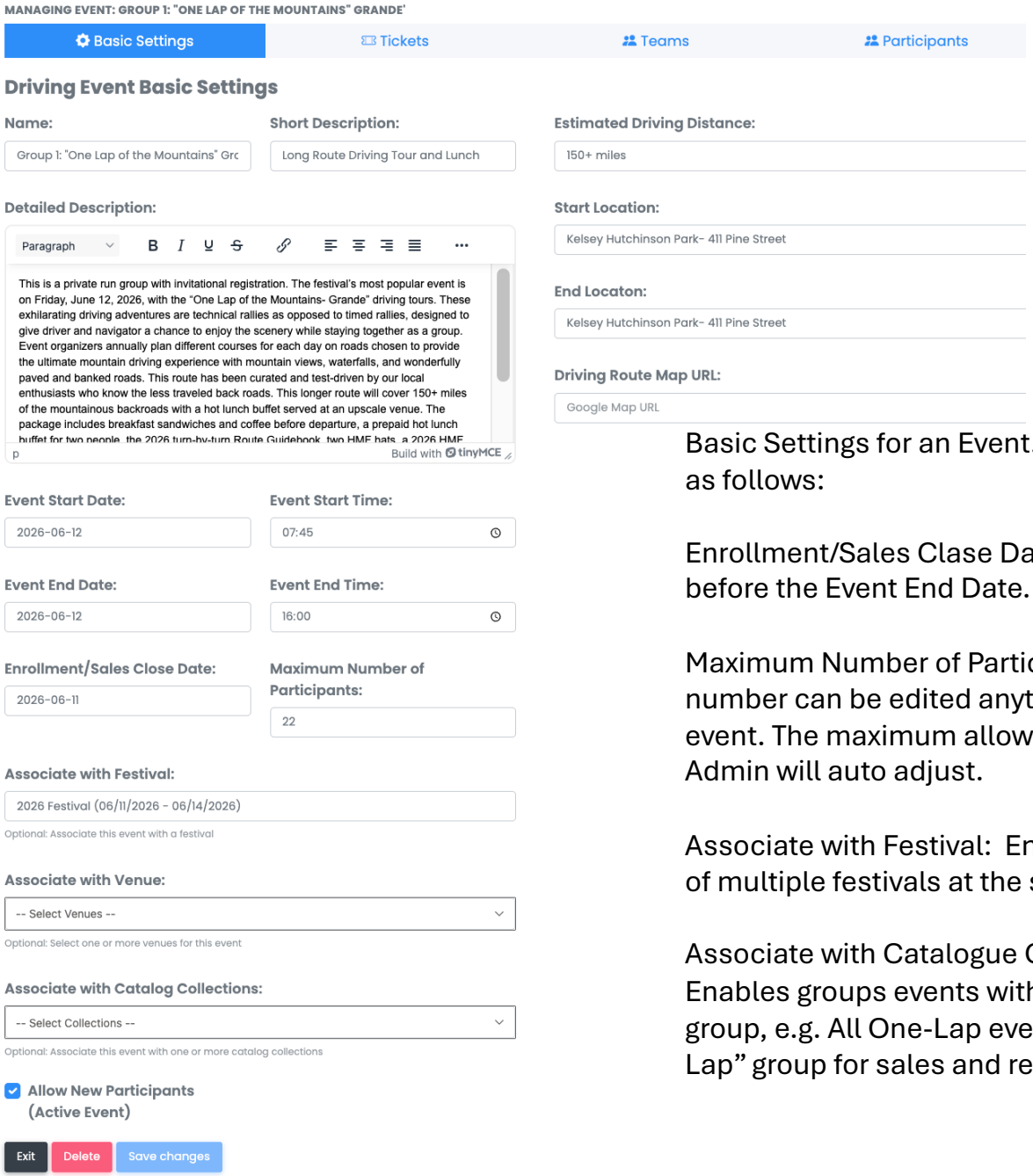
There is a space for internal note which are not shared with the patron

Car Show



Approved Patrons have a “Manage Placard” option. This window include all previous car information plus an entry area for the Placard Name and to select the Group Class

The Event – One Lap



Basic Settings for an Event. The key areas are as follows:

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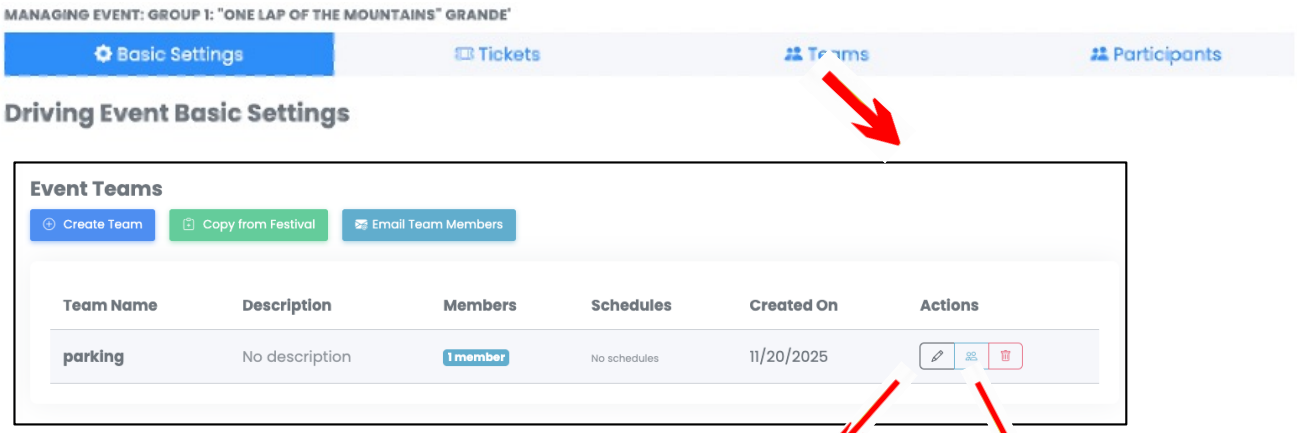
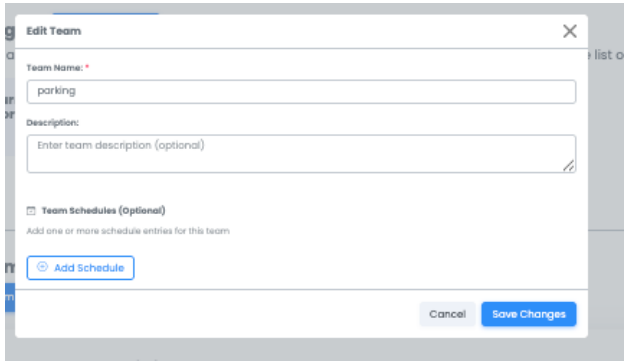
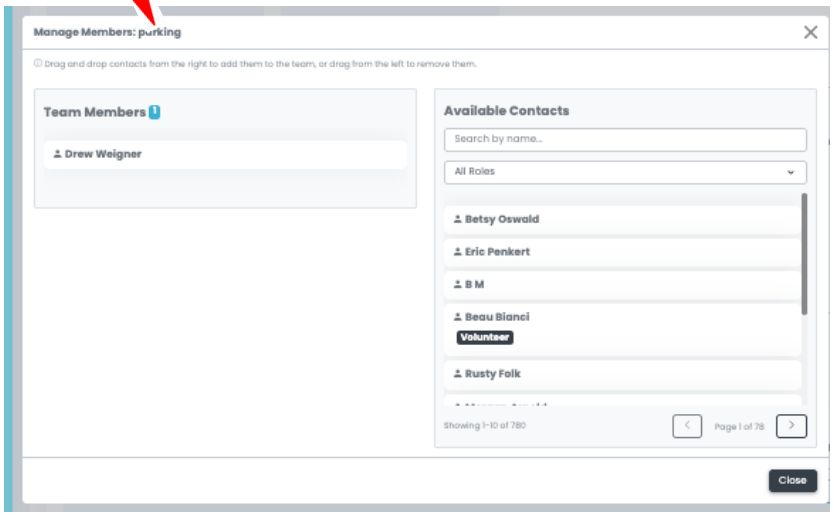
The Event – Teams



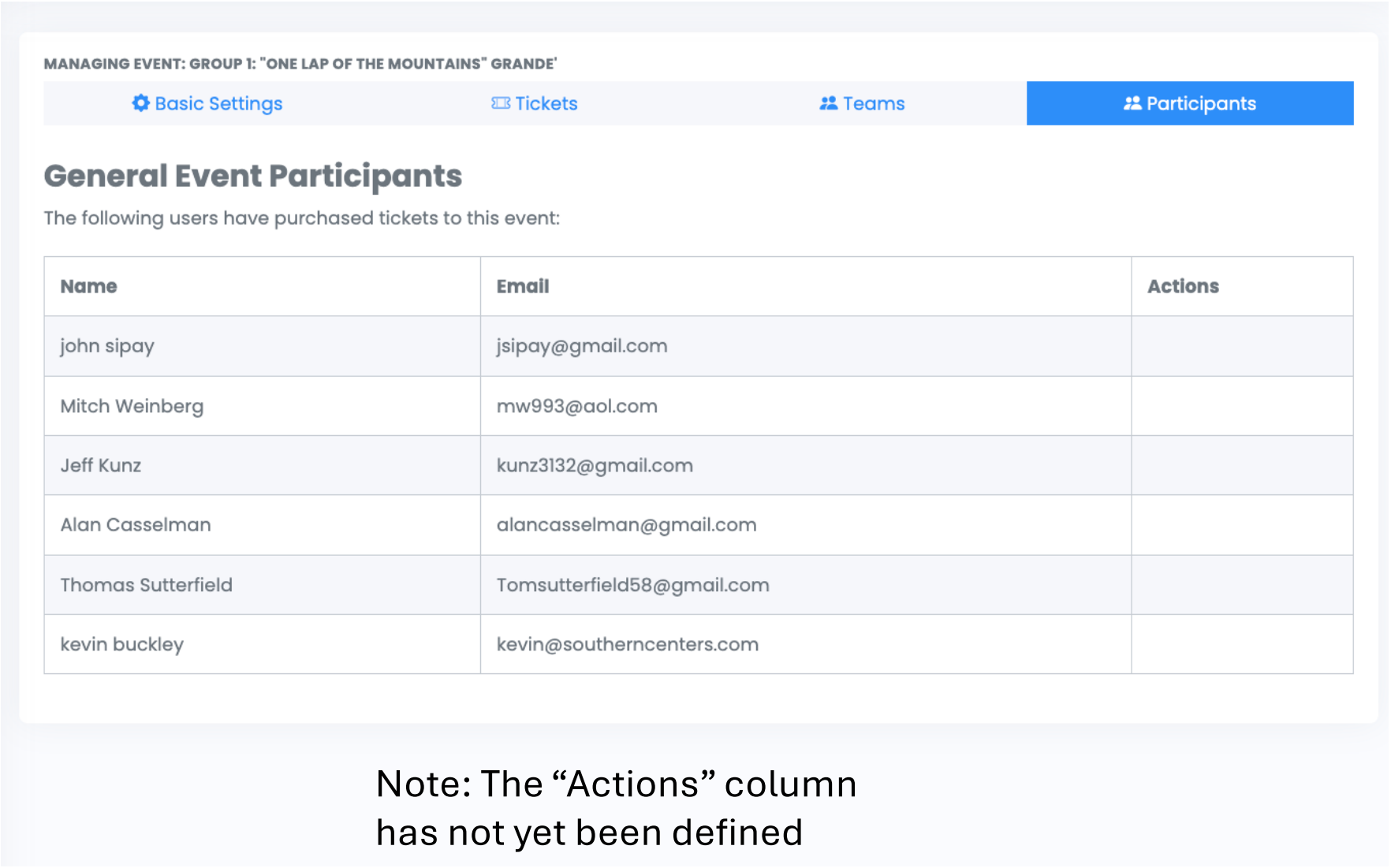




Once a team is created you can fill the team from the Tagged list of volunteers. The list of volunteers is first made at the Festival Level and include all those tagged as volunteers.

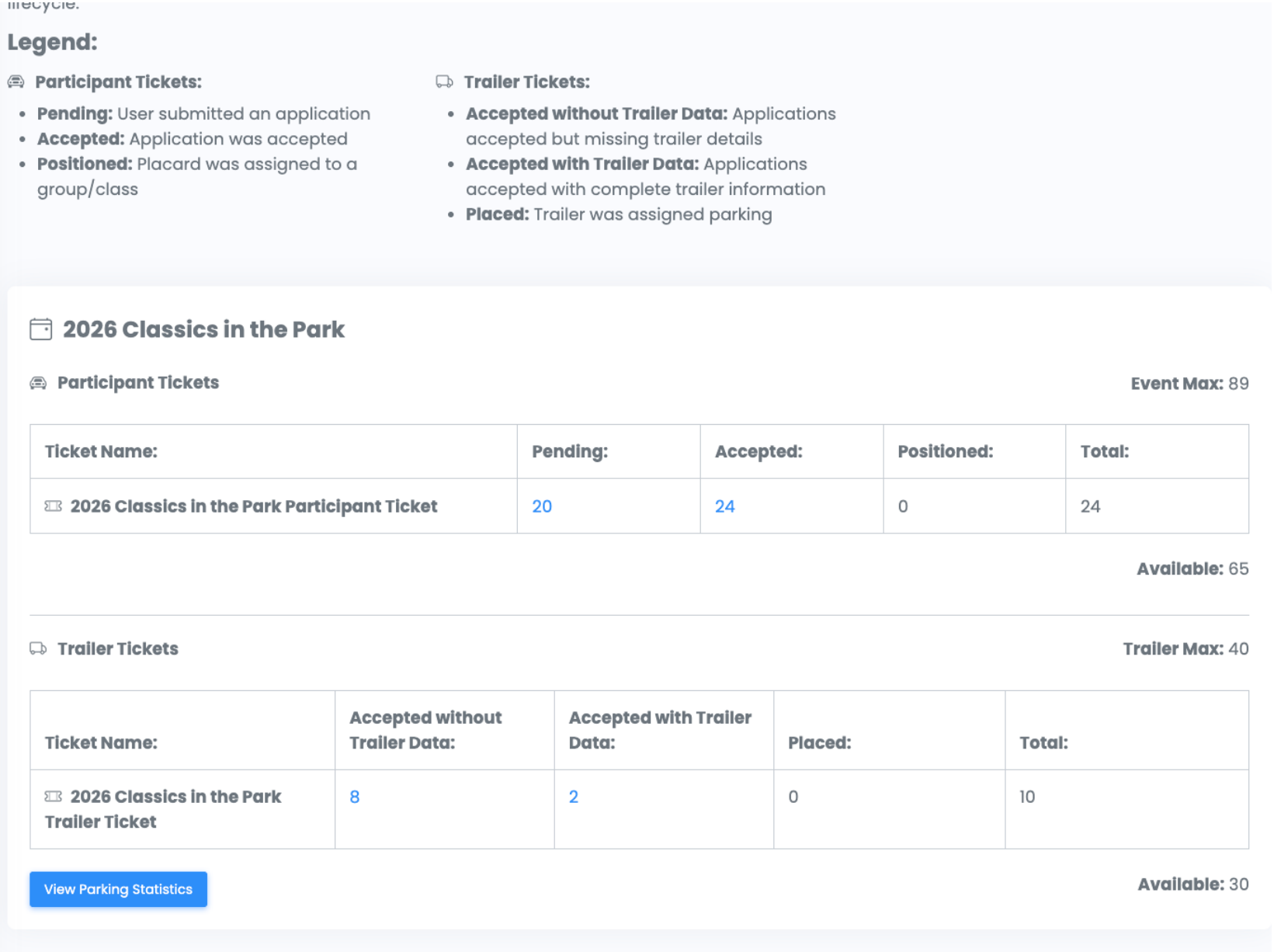
Of note is anyone in the system can be tagged as a volunteer including an Admin. You can create a team at the Event level by clicking the “Copy From Festival” which will fill the entire team, from there you can remove those not required.

The Event – Participants



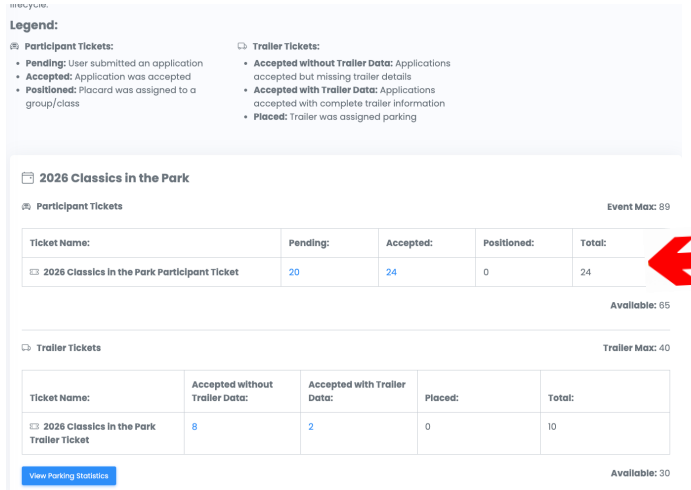
Note: The “Actions” column has not yet been defined

Sales - Admin



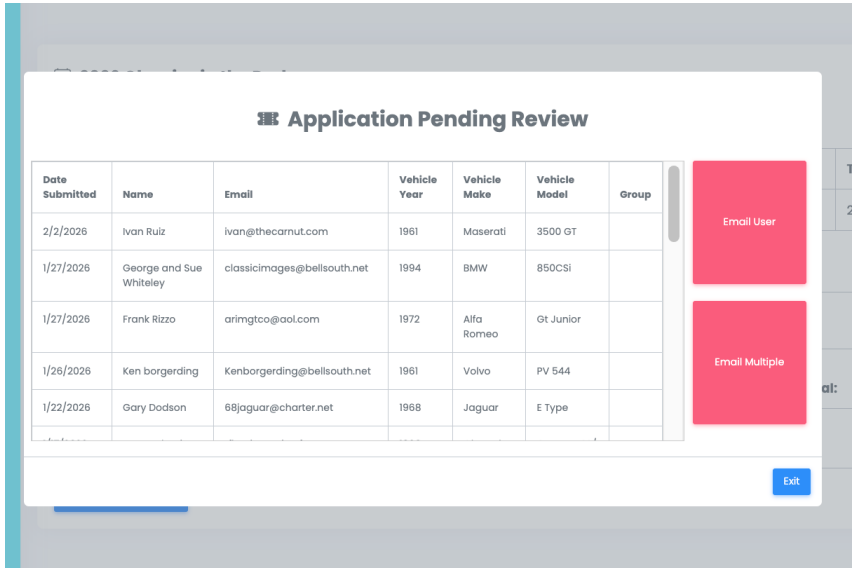
One window to have visibility over the entire Car Show inventory.
NOTE: Ability for Admin to enter a trailer for a person not in the car show will be delivered in version3.X

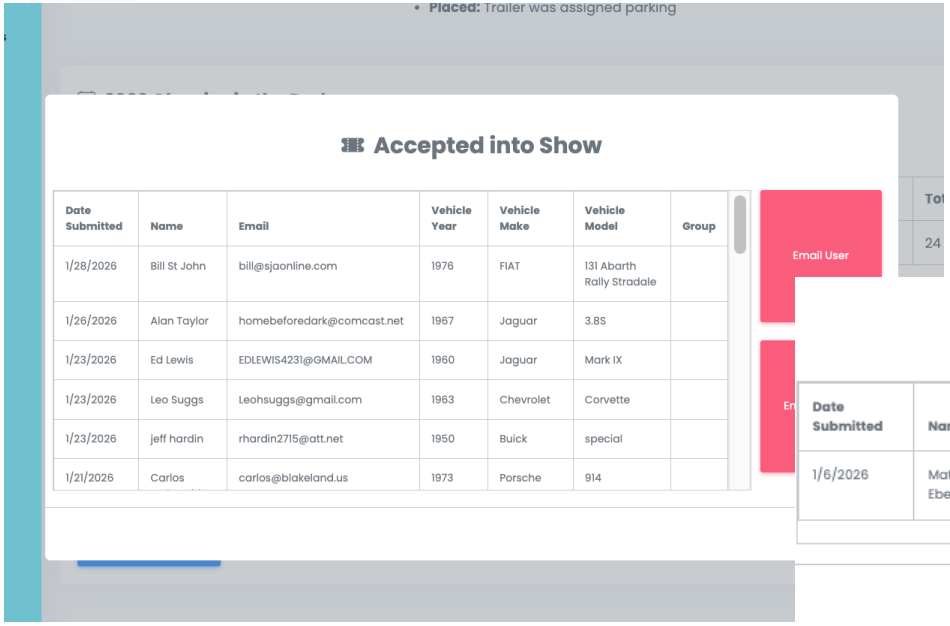
Sales Admin – Car Show

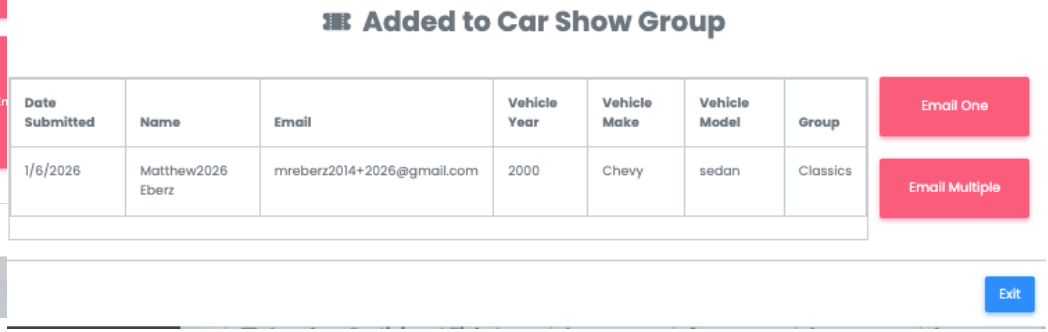


Accepted into the car show

NOTE: "Group" to be removed in Version 3.X





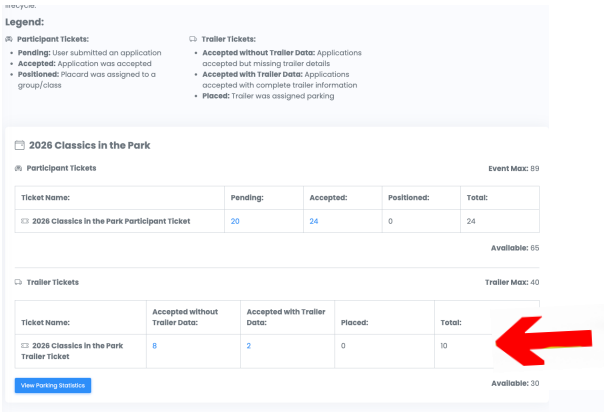


Accepted into the car show

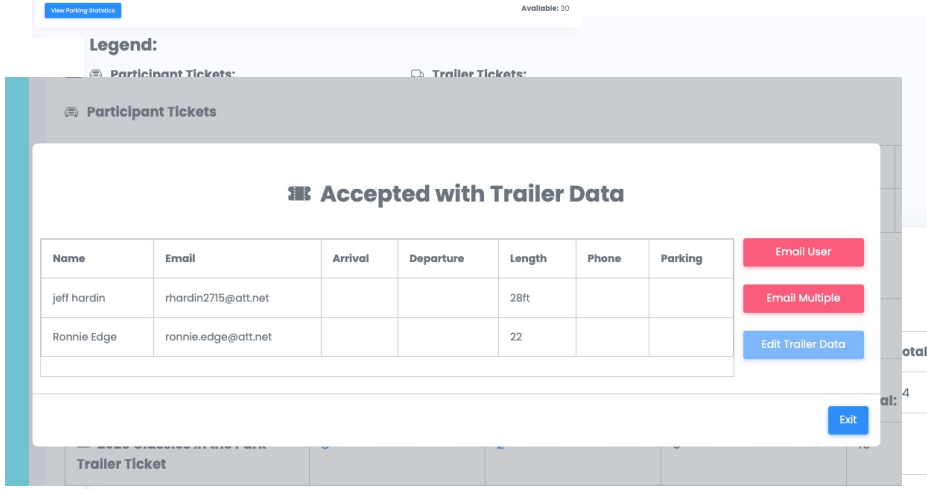
NOTE: Option to be added on the right panel, "Images" will open a window with the car images Version 3.X

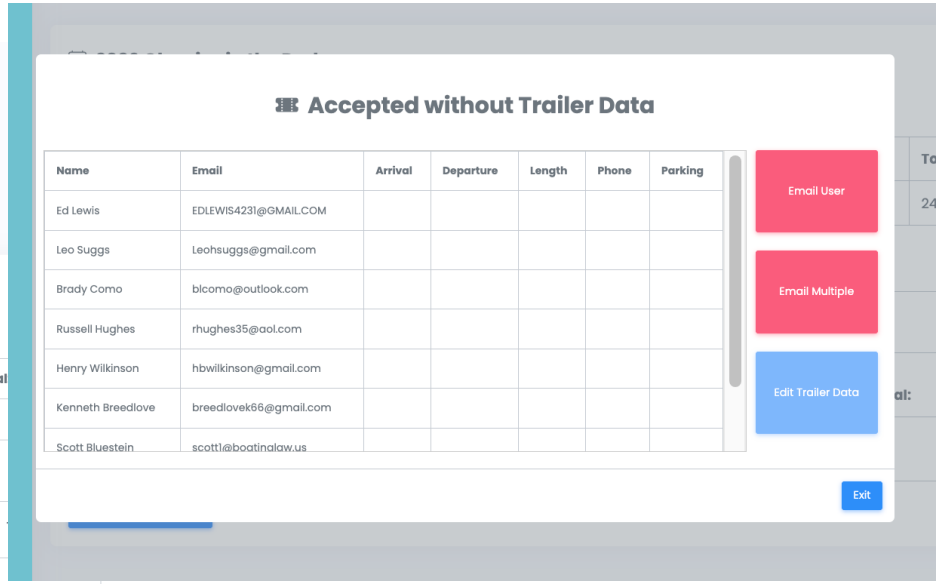
Vehicles placed into Groups via "Manage Placard" tab of Manage Event

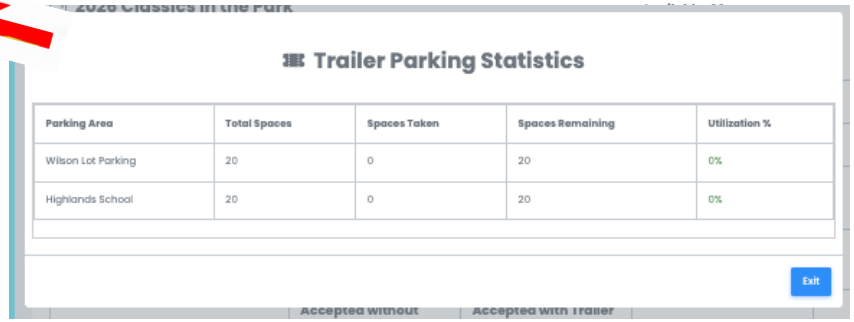
Sales Admin – Trailer



Trailer data is provided by the patron in the application Trailer Request.
Admin may enter the data manually

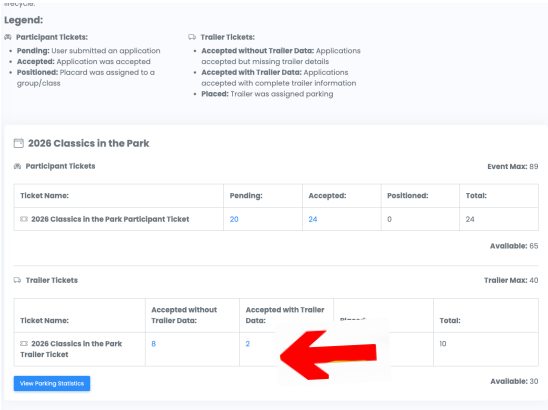


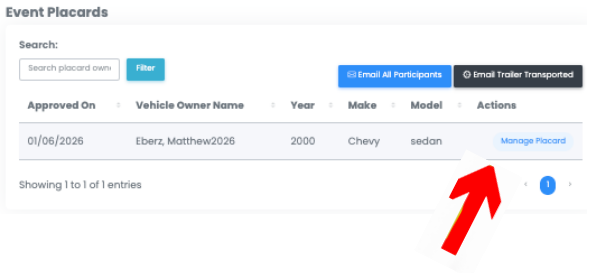




Provides data on parking space utilization

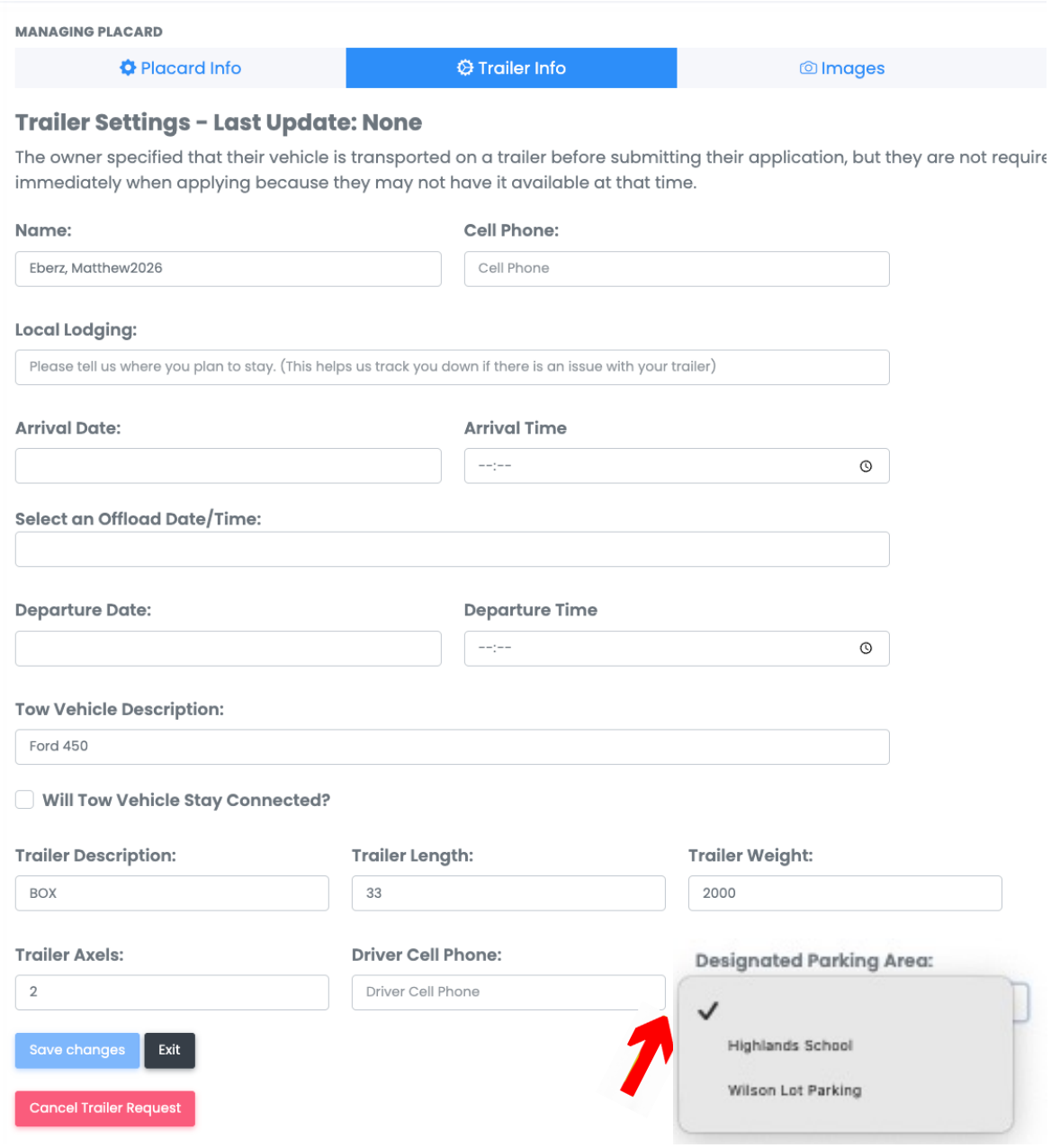
Sales Admin – Trailer



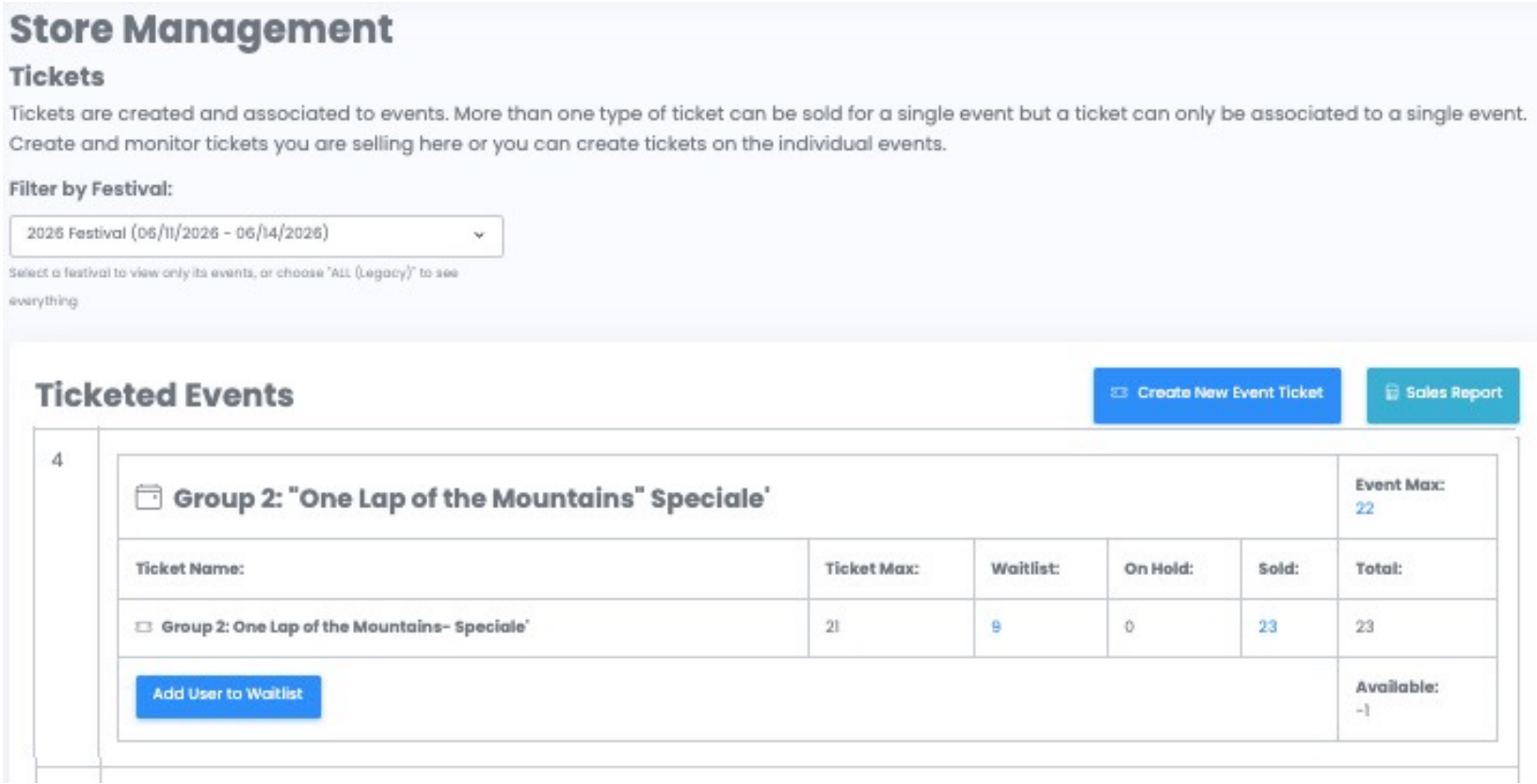


When Admin wishes to place a trailer in the Manage Car Show Event window, select the record/vehicle you wish to place, click ”Manage Placard” then “Trailer Info,” go to “Placards” in the.”

Note “Designated Parking Place Area” If no parking options there, go to Global Settings parking. Global Parking allows to add the number of spaces to parking options. These are needed to accurately parking available/consumed counts.

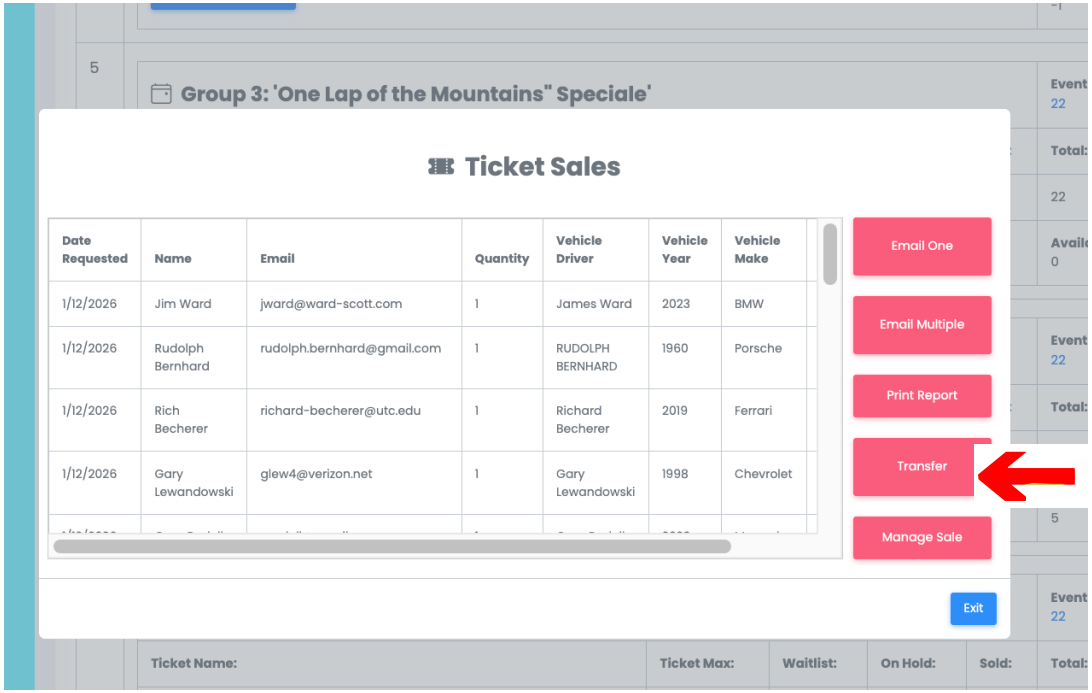


Sales Admin – One Lap



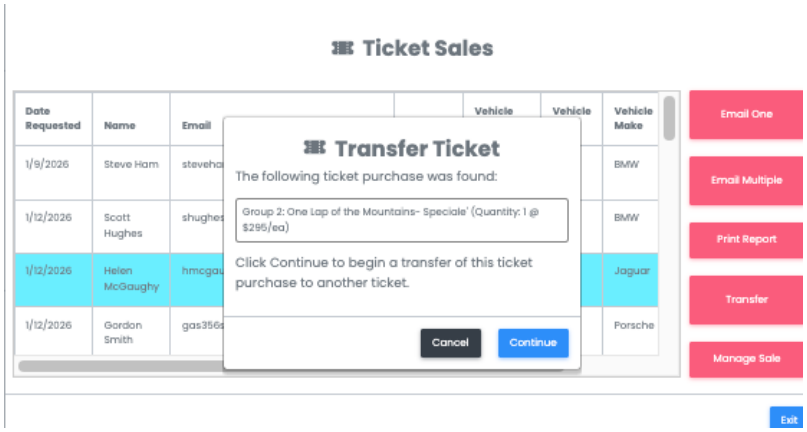
The Sales Admin provides a “One Window” of management for ticket sales of all types. EVENT ROADSTER is designed around a “Ticket Concept” whereby everything for sale and every cars show spot and parking spot is programmatically treated as a ticket. This enables a standardized way of looking at inventory of all types, from Car Show to One Lap, to Dinner, to the sale of merchandize.

Sales Admin – One Lap - Transfer



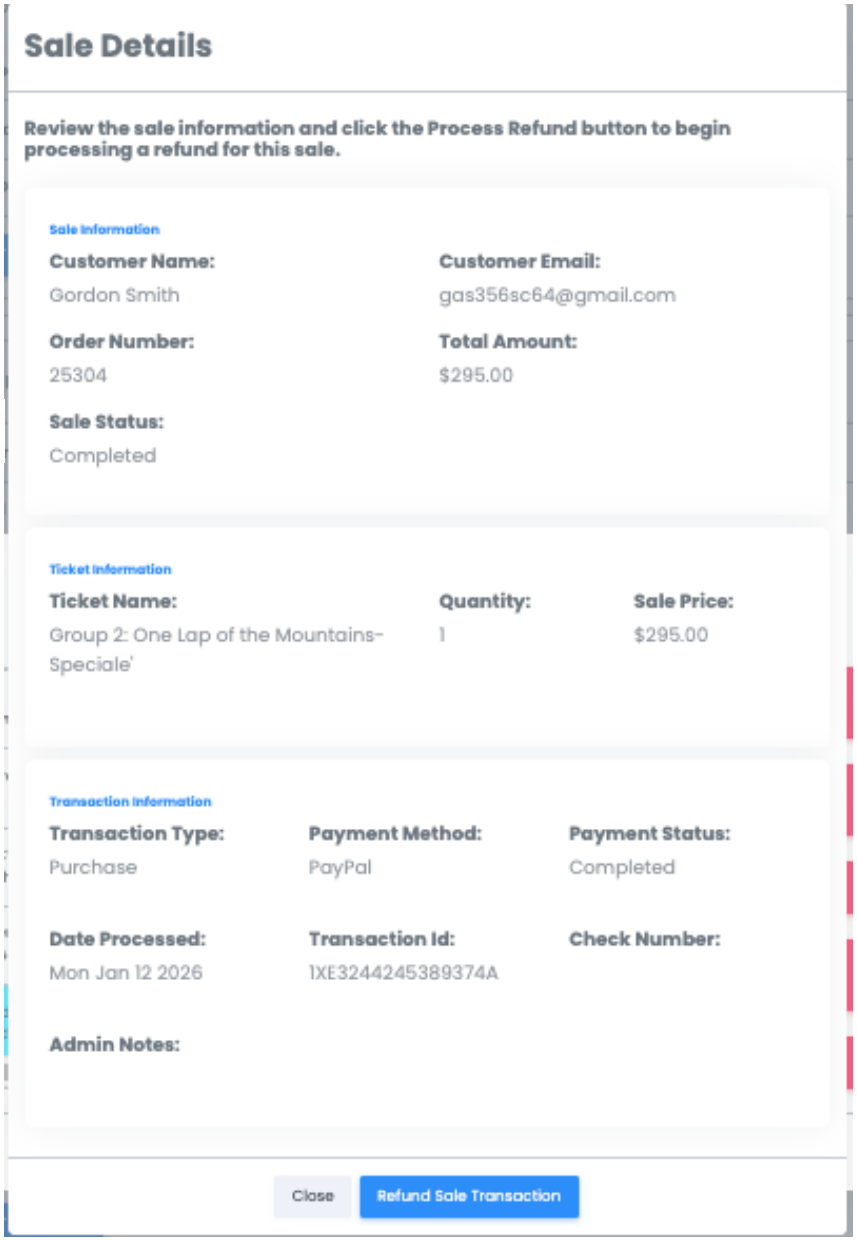
One of the capabilities of the Store Admin is to enable transfer of tickets from one vent to another. Select a person record and the “Transfer” and you will get a message the system recognizes the record and the ticket. Select ”Continue” and you will be presented with a list of ticket to choose from. Once completed the system will automatically adjust the inventories of both tickets.

If the destination select is Sold Out, the system will override the Maximum Ticket level and allow the transaction.



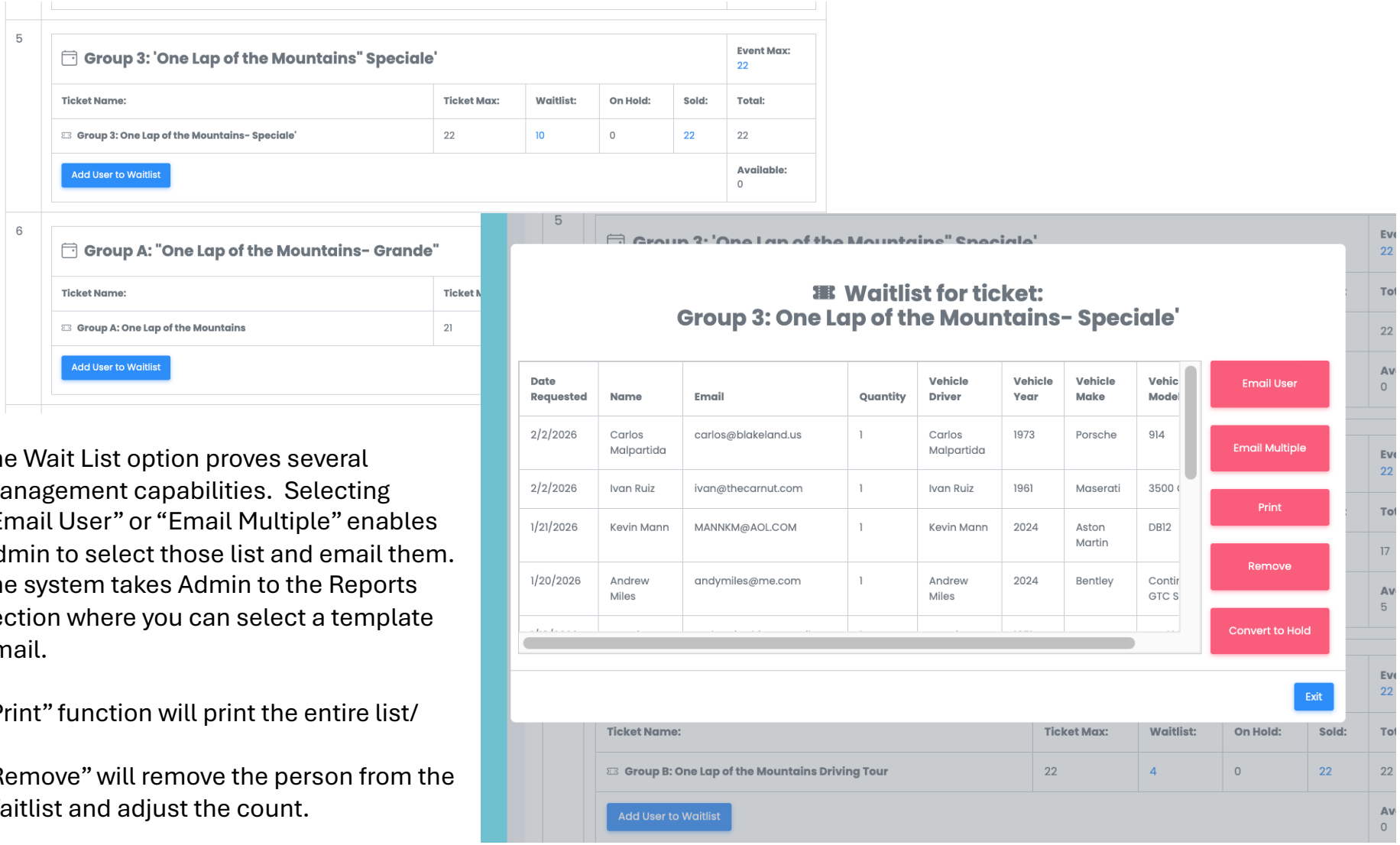
Event Roadster Version 3.X will provide the ability to transfer tickets of different prices and offer methods to refund, request more payment or comp the transfer.

Sales Admin – One Lap - Refunds



Manage Sales provides a complete account of the selected transaction. By selecting “Refund Sale Transaction” the system will post the refund and send an email to the patron that the transaction has been completed.

Sales Admin – One Lap – Wait List



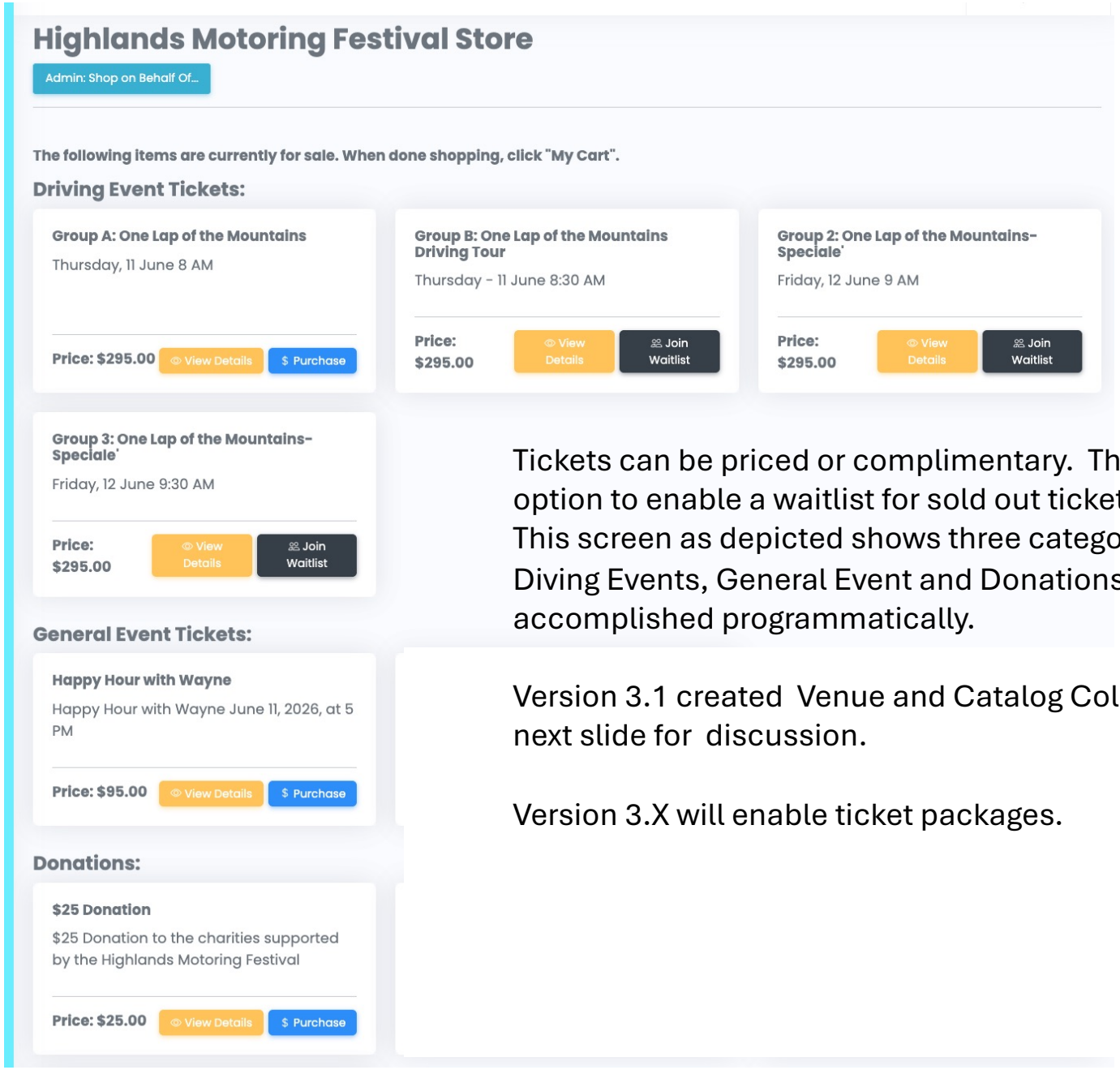
The Wait List option proves several management capabilities. Selecting "Email User" or "Email Multiple" enables Admin to select those list and email them. The system takes Admin to the Reports section where you can select a template email.

"Print" function will print the entire list/

"Remove" will remove the person from the Waitlist and adjust the count.

"Convert to Hold" is a powerful tool that will allow Admin to select a record in the list and then the system will send a message to the patron that the ticket is now available for sale. In that process the count of "Wait List" is reduced and the count of "On Hold" is increased. If the patron choose to purchase the ticket, the email message provides a link for the sale. If completed the system reduces the count in "On Hold" and increase the count in "Sold." Once Admin places the record to "Convert to Hold" Admin the entire sale and posting process are automatic.

The Store

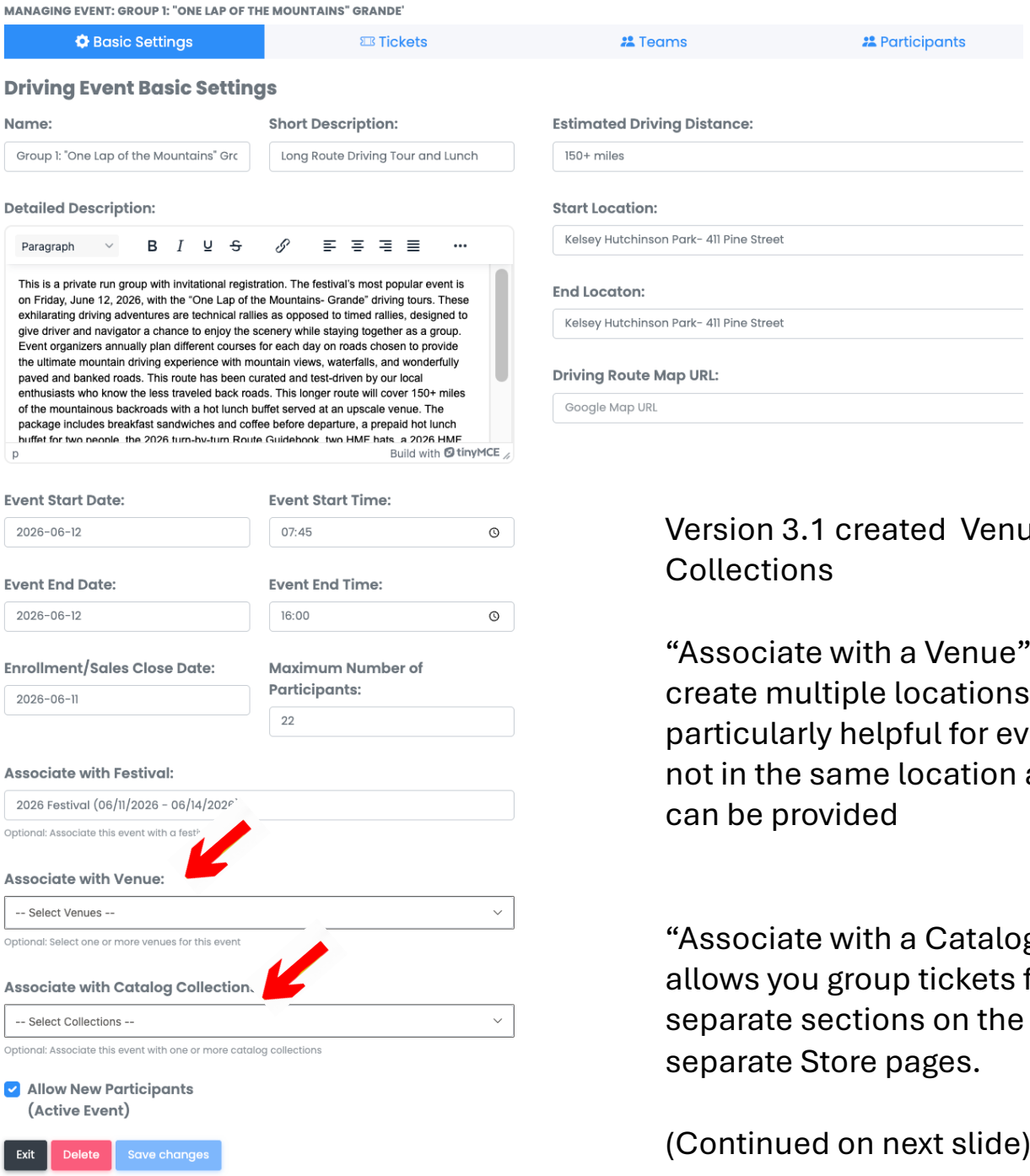


Tickets can be priced or complimentary. There is the option to enable a waitlist for sold out tickets.
This screen as depicted shows three categories of tickets: Diving Events, General Event and Donations. This was accomplished programmatically.

Version 3.1 created Venue and Catalog Collections (See next slide for discussion.

Version 3.X will enable ticket packages.

The Store – Global Venue & Collections



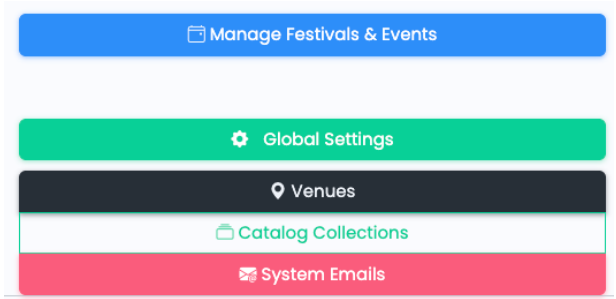
Version 3.1 created Venue and Catalog Collections

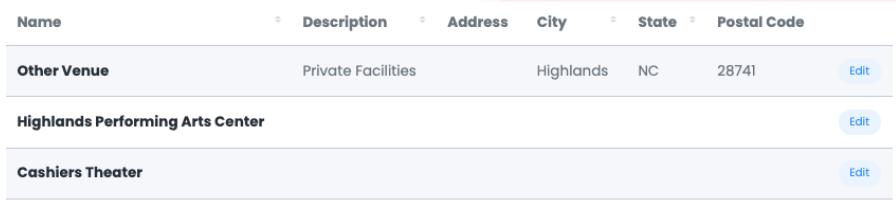
"Associate with a Venue" allows you to create multiple locations for events. This particularly helpful for events that are not in the same location and directions can be provided

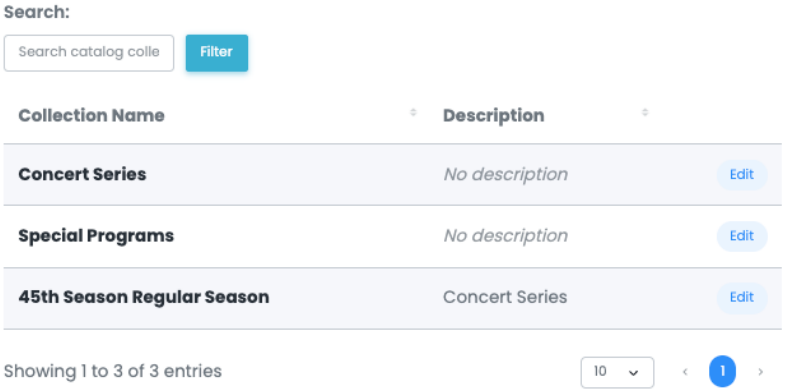
"Associate with a Catalog Collection" allows you group tickets for sale into separate sections on the Stoere Page or separate Store pages.

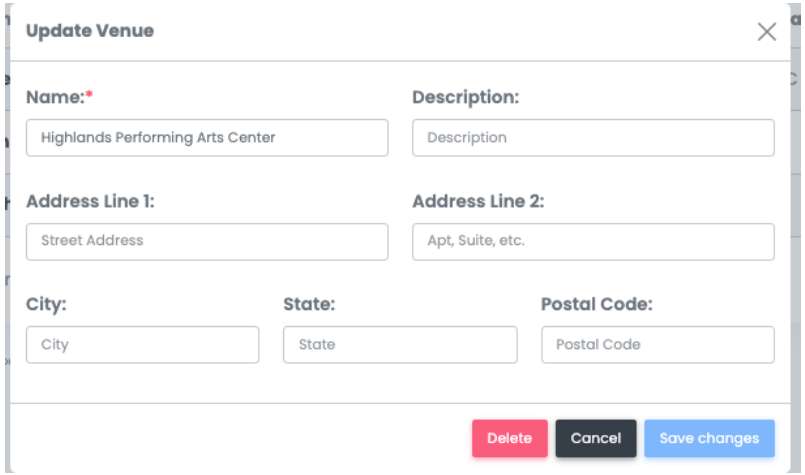
(Continued on next slide)

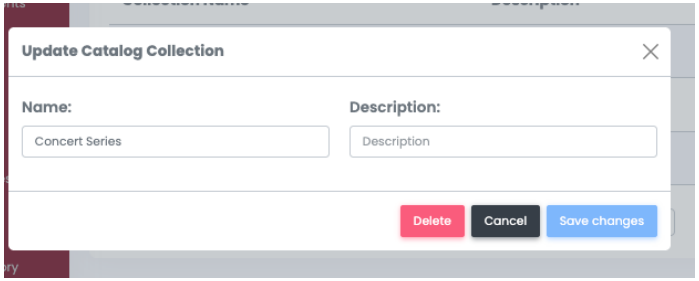
The Store – Global Venu & Collections





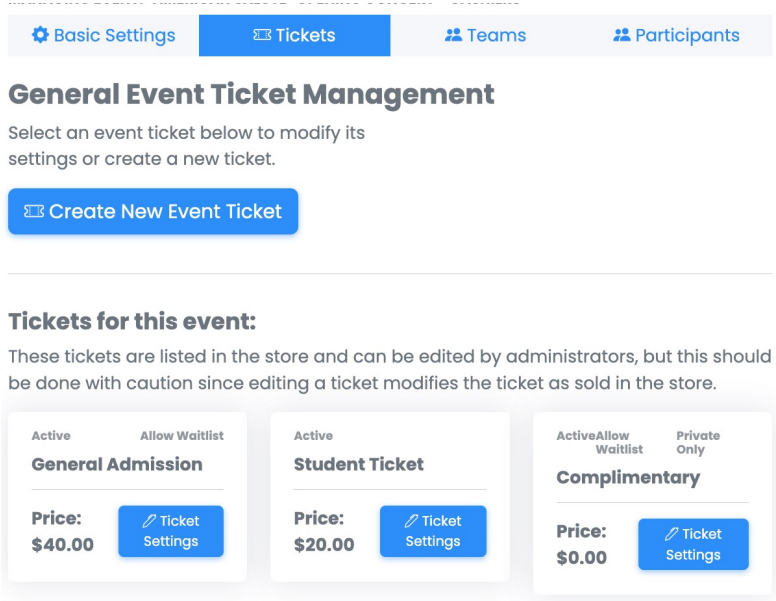


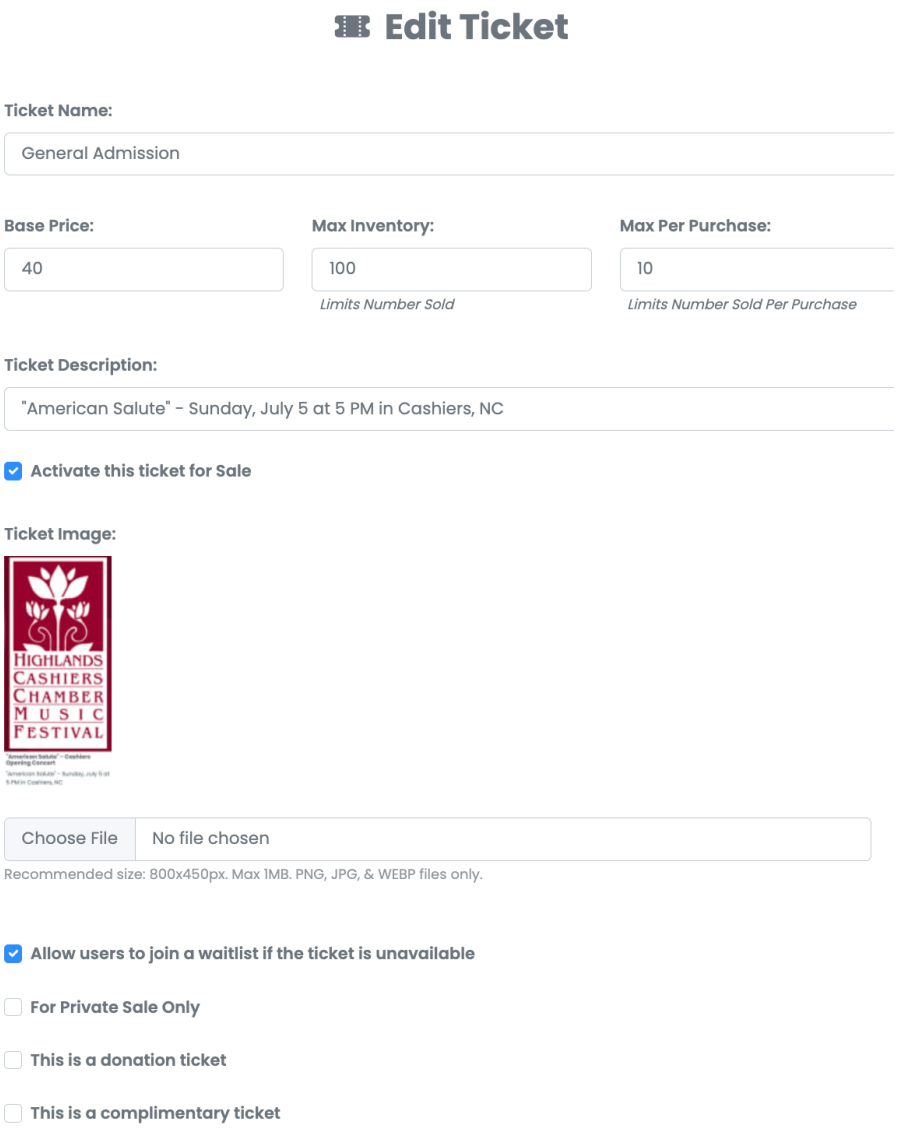




Version 3.1 created Venue and Catalog Collections. For both use Global settings to add or edit both.

Event – Ticket

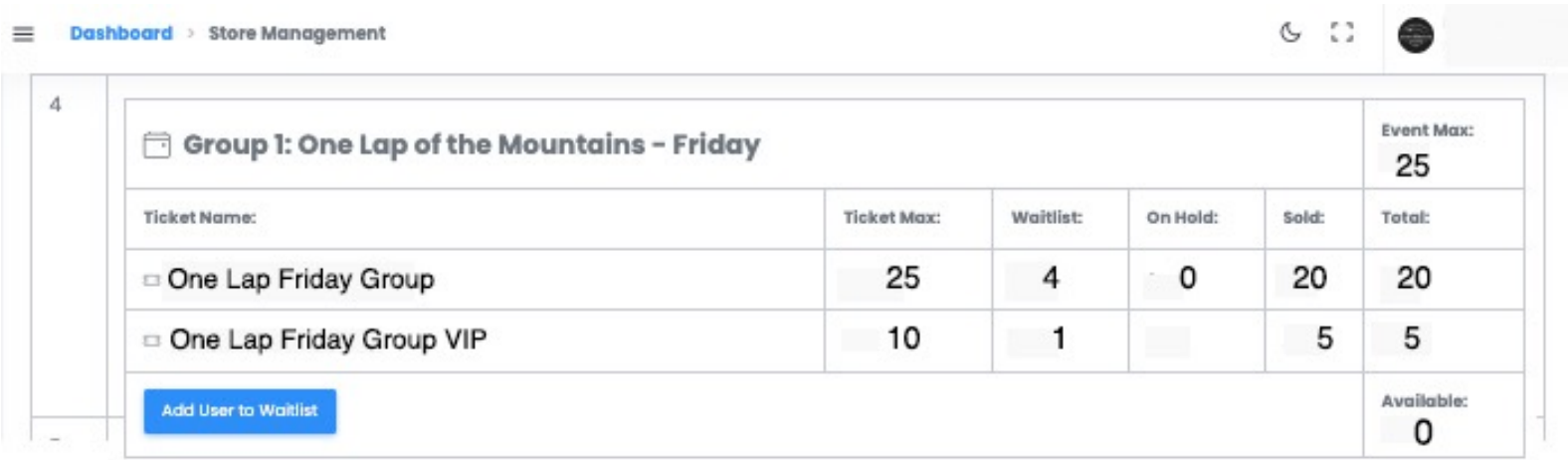




Creating ticket is as easy as it gets. Click "Create New Evet Ticket" and enter the data. You can have a multitude of both type and numbers.

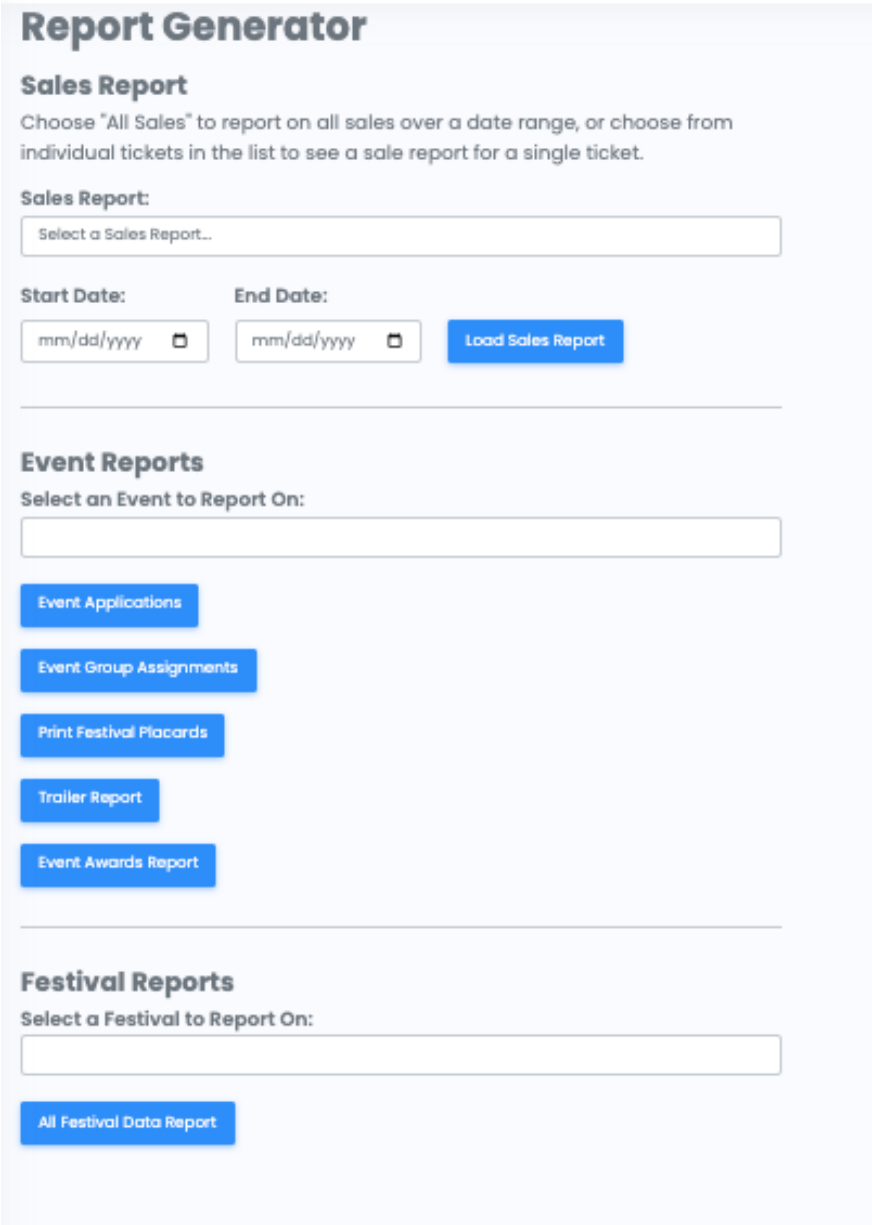
- Options include allowing when sold out going to a Wait list.
- Setting it for Private Sale which will place the tickets on a separate Store window. Patrons are given a URL and can shop.
- The ticket can be set as a Donation ticket which enables ease of accounting.
- It can also be a complimentary ticket. This type of ticket can be set for a price for accounting but does not process through the credit card system for payment.

Event – Ticket – Multiple Same Event



EVENT-ROADSTER has the unique capacity to have multiple tickets each of which has the capacity to all be sold, even thought their total exceed the Maximum number to be sold for the event. Notice the top list ticket is able to be sold 25 times, the entire inventory. The VIP ticket can be sold 10 times, the total of the two tickets is 35, which exceeds the maximum level. The system manages the total sales and stops sales when that number is reached.

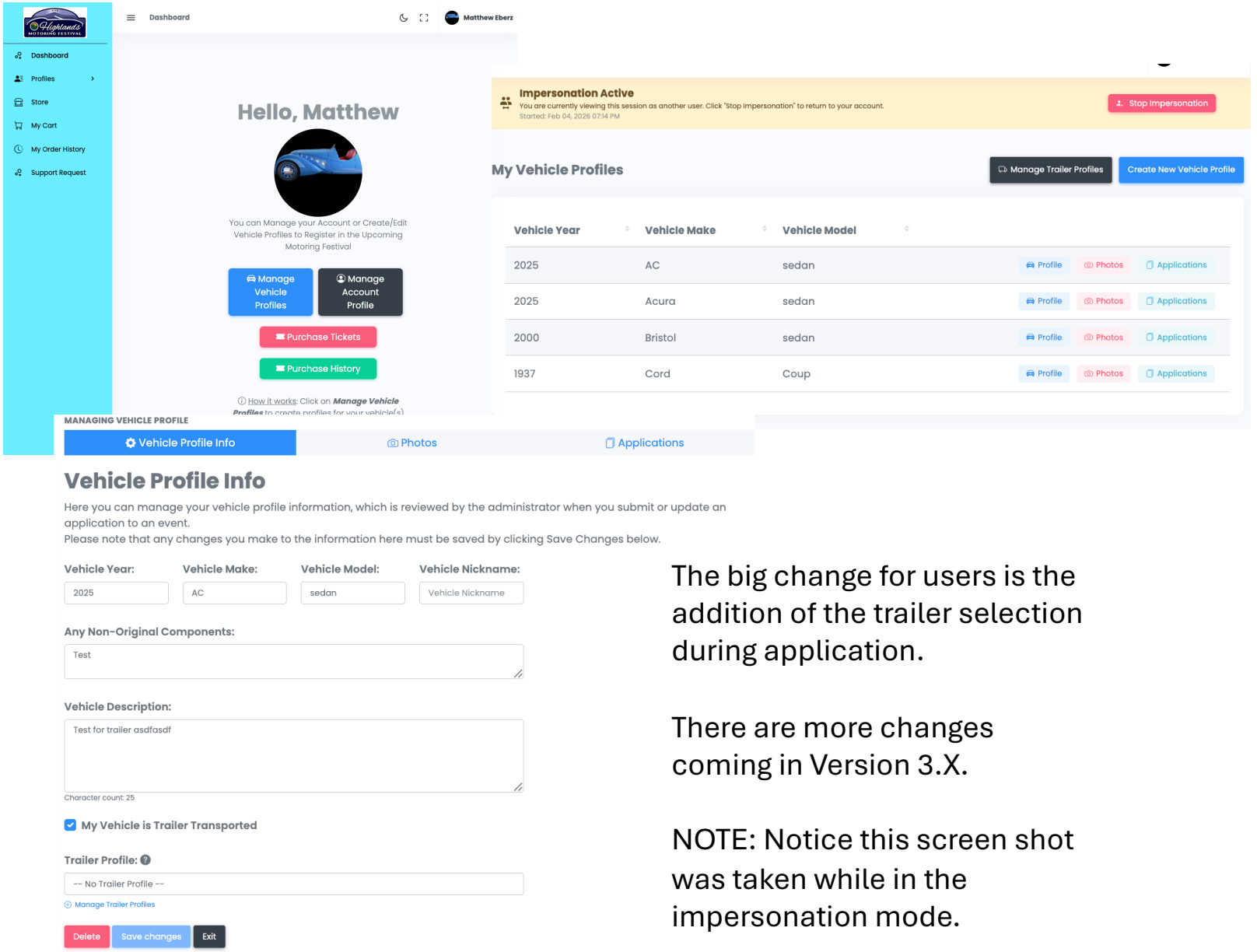
Reports



The format for Reports is unchanged from Version 3.0, it is entirely under redesign. The flyout will be different and some of the reports will be modified.

The new Reports will be delivered at Version 3.X

Patrons

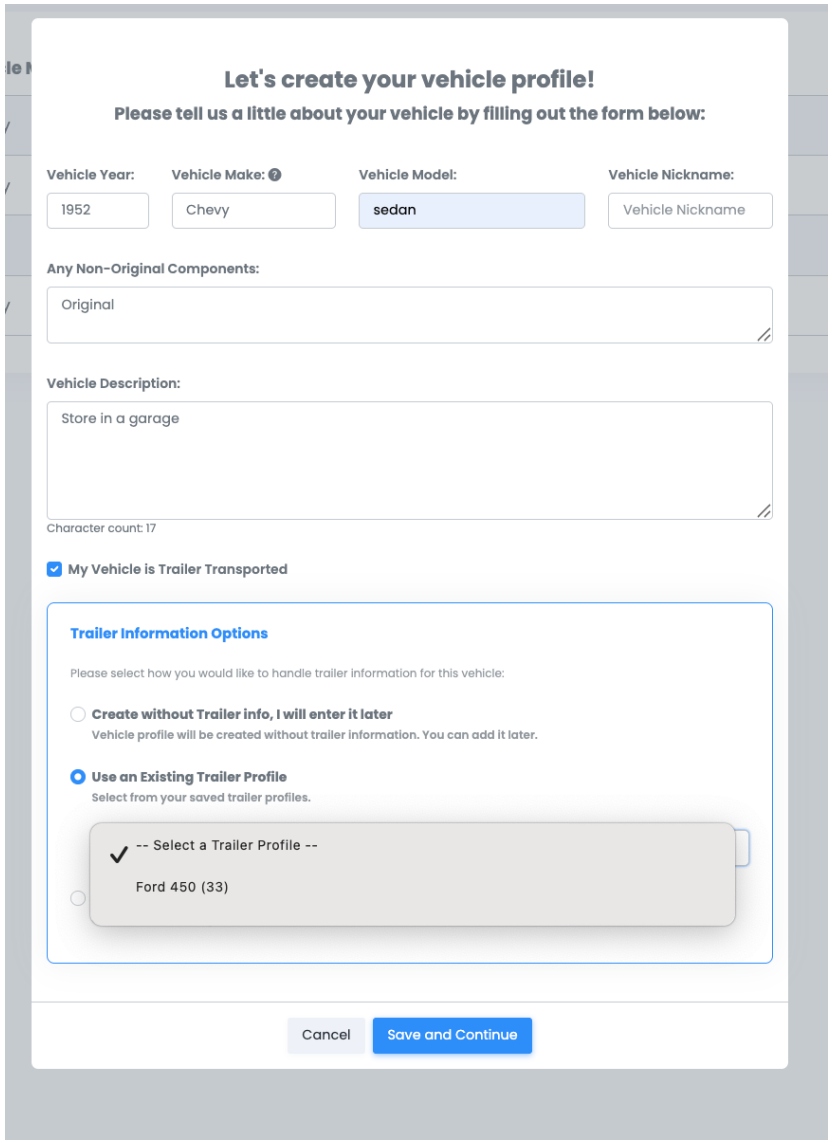


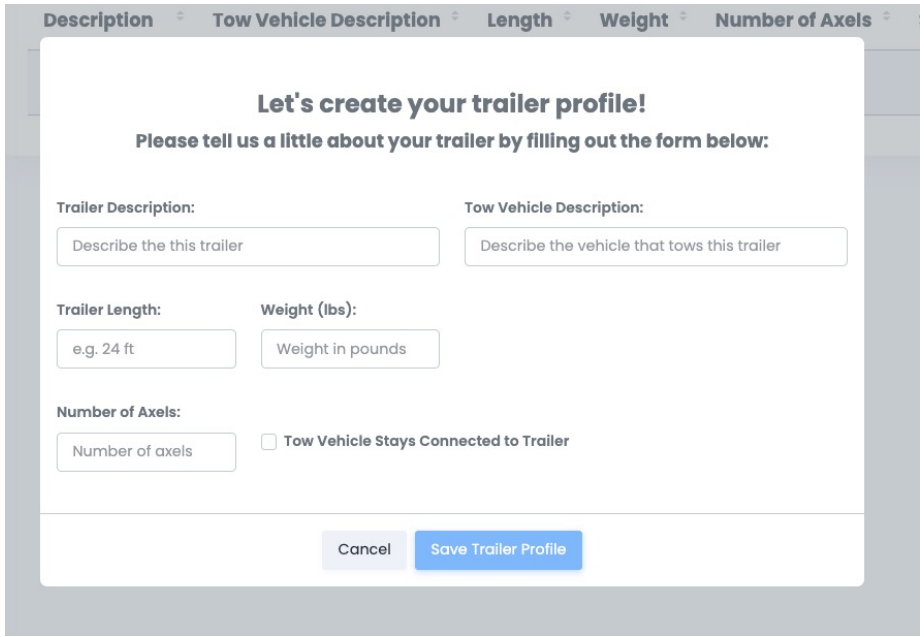
The big change for users is the addition of the trailer selection during application.

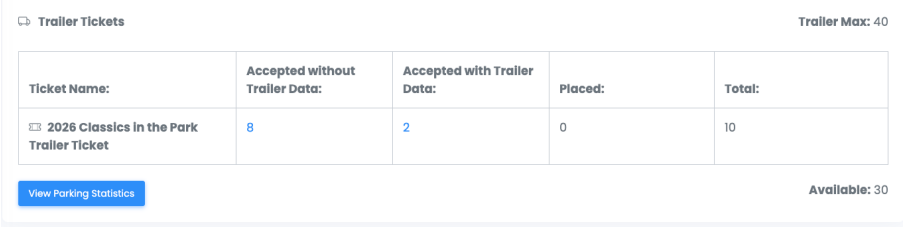
There are more changes coming in Version 3.X.

NOTE: Notice this screen shot was taken while in the impersonation mode.

Patrons





Patrons now have the option of creating a a trailer profile later, Using one in the system or entering a new one then.

This is a big step for for the Trailer Admin as this enables the Admin to see what patron have been accepted and if they have complete data.