

Entering a Membership Only Event

<https://pfqf.myeventscenter.com/>

Youtube Tutorial: [HERE](#)

1. Log in with your chapter account – contact your regional rep if you do not have this information.
2. Each chapter will already have a draft event in their account. Use this for Fiscal Year 2022 and from there you can either create a new one or copy the past one for each additional fiscal year (July 1 – June 30).
3. Select *Create an Event*:
 - a. Use the *PF/QF Membership Entry Only* template.
 - b. Name the event: **CH_____ Memberships FY22**. *Fiscal Year 2022.
 - c. Start date should be July 1st of this year and the end date should be June 30th of the following year.
 - d. Double check the event is set to *Private* and *Ticketed*. (The template default will be a private event)
 - e. Save and click *Next*
 - f. Enter Venue Information: **The venue selection will not affect this event, but one does need to be selected/entered**. You can default to National: 1783 Buerkle Circle, St. Paul, MN 55110 – since you are simply submitting memberships.
 - g. Click *Next* to open the Ticketing page: Double check that all the membership levels you need are available in the tickets section.
 - h. Click *Next* to open the Payments page: Make sure Stripe is selected and that the *PF/QF Chapter Accounts* Stripe account is chosen. Leave everything as is, since no credit cards will be charged but since the tickets are not free this information must be selected.
4. Hit *Publish* at the top of the page. Your Regional Rep will need to approve this for you to enter memberships. Feel free to send them an additional email if it is not approved within 24 hours, but keep in mind it will be quicker if this event is created during the work week.

- Once your event has been approved, log in and select your event. This will bring you to that event's Sales Dashboard.

The screenshot shows the 'Sales Dashboard' for event 'CH0001 Memberships Banquet Hall'. The left-hand menu includes sections for REPORTS, DESIGN, PROMOTE, and MANAGE. Under REPORTS, 'Sales Dashboard' is highlighted with a red arrow. Under MANAGE, 'Check / Cash Sales' is circled in red. The main dashboard area displays 'Event overview' with a table of sales metrics, 'Online sales totals' with a table of fees and income, and a 'Daily sales' graph with radio buttons for Daily, Weekly, and Monthly views.

Item	Amount
Quantity	0/unlimited
Revenue	\$0.00
Refunds	\$0.00
Net Revenue	\$0.00
Service Fee	\$0.00
Processing Fee	\$0.00
Discount	\$0.00
Total fees	\$0.00
Income	\$0.00

- Select *Check/Cash Sales* from the left-hand menu.
- Fill out all fields and the correct ticket/membership type, and then select *Search CRM* to open the search boxes.

The screenshot shows the 'Tickets for: CH0001 Memberships' form. The form includes the following fields and options:

- Sale Type:** Cash, check, or credit sale Complimentary
- Fulfillment Method:** Will Call (circled in red)
- Performance:** CH0001 Memberships - Wed, Feb 3, 7:00 PM
- Ticket Type:** PF Annual Membership : \$35.00 (circled in red)
- Quantity:** 1 (circled in red)
- Amount Collected:** 35.00 (You can change this if other than face-value)
- Guest Email:** optional
- Guest Name:** name required

At the bottom of the form, there is a 'Search CRM' button (circled in red) and a search input area with fields for Last, First, and State, and a 'Search *' button. A red 'X' icon is also present in the search area.

* Search CRM database for members by FULL last name, PARTIAL (or full) first name, and state (optional).

8. Search the membership database by entering a partial first and last name, and their State if it is a common name.
9. Click *Search*, you cannot initiate a search by pressing “enter.”
10. You can further filter the initial list results by typing out more of the first or last name.

The screenshot shows a web interface titled "Search CRM" with a search bar containing the text "johnson", "jo", and "mn". A "Search *" button is visible. Below the search bar, a light blue banner indicates "Found 136 matches in 8.0 seconds". Three search results are listed:

- Johnson, Johnathan** : 2171064 :
11 13th Ave NW - Kasson, MN 55944-9423
- Johnson, Jordon** : 2097819 :
13827 270th Ave NE - Goodridge, MN 56725-8741
- Johnson, Joseph (Joey)** : 2047893 :
21977 Forest Lodge Rd - Fergus Falls, MN 56537-7302

11. Select the individual to assign this membership ticket to and if all information is correct, select *Submit*.
 - a. You can change the individual’s address information if an email is present.
*A dummy email will automatically populate for those who do not have one in our database. If you have an email for this person, please enter that. If not, leave the dummy email.
 - b. If changes are made to the individual’s name, they will no longer be connected to that member ID.

The screenshot shows a form for entering guest information. The fields are:

- Guest Email:** gwhipple@pheasantsforever.org
- Guest Name:** Grace Whipple (ID: 2302722)
- Search CRM:** A search bar with a plus icon and a magnifying glass icon.
- Notify:** Email to guest
- Comments:** optional

At the bottom, it says "Guest Address & Phone are optional".

12. Once submitted, you can go back up to the top and select a new membership ticket type and/or quantity to start a new order.
13. If you are submitting a new member, follow this same process but enter their address and contact information. If you do not have their email, please enter a fake one (i.e., whipple@fake.com) so that their address information will save to their membership.
14. Be sure to hit *Submit* at the bottom of the page each time you enter an individual.

[BACK TO DASHBOARD](#)

Tickets for: CH0001 Memberships

Sale Type: Cash, check, or credit sale Complimentary

Fulfillment Method: Will Call ▾

Performance: CH0001 Memberships - Mon, Mar 29, 7:00 PM ▾

Ticket Type: PF Annual Membership : \$35.00 ▾

Quantity: 1 ▾

Amount Collected: 35.00 (You can change this if other than face-value)

Guest Email: timjohnson@email.com

Guest Name: Tim Johnson ID:2318454

[+ Search CRM](#) 🔍

Notify: Email to guest

Comments: optional

Guest Address & Phone are optional

Address: W7422 Us Hwy 10

City: Ellsworth

State: Wisconsin ▾

ZipCode: 54011

Country: United States ▾

Phone: Phone

15. There is no final Submit button, each record is submitted separately. Once your “event” is finished, these memberships will be processed in our database.