**Website Tutorial – Ski Flight Trips**

This tutorial covers the steps to create, update and monitor ski flight trip events on the Wild Apricot (WA) website. Here are the topics:

* Updating the web pages
* Creating the event pages
* Enabling events for registration
* Registering participants
* Invoicing
* Updating invoices (Ground Only, Single Supps, lift tickets)
* Refunds
* Monitoring trip status

**UPDATING THE WEB PAGES:**

There are three web pages that describe the Ski Flight Trips program, all of which can be reached via the main toolbar at the top of the HOME page. Clicking on WINTER SPORTS takes you to the “Welcome to the SCWDC Winter Sports Program” page, which needs to be reviewed for content and updates to links. Hovering over the WINTER SPORTS button yields a pop-up window w/ 4 options: 2020 SKI FLIGHT TRIPS & STATUS BOARD, EPIC & IKON PASSES, EASTERN SKIING, and SKI SCHOOL. The 2020 SKI FLIGHT TRIPS & STATUS BOARD content looks OK, but the Status Board needs to be updated to show the 2021 ski trips, prices and trip leader names. This information will not be available until Ken Eng completes the first Dashboard.

In previous years the trip leaders were asked to provide weekly updates to Ken with a breakout of registrants, cancellations, single supps, & Ground Only’s. Ken would then update the Status Board accordingly. This year that process seemed to break down. Since I received daily notification of the registration transactions, I took it upon myself to update the Status Board every morning. When I had questions, I would export a registration spreadsheet and send it to the trip leader for confirmation. In my opinion, this process worked very well, especially in the last few weeks leading up to a trip’s departure, when the status (number of open spots, male or female, Ground Only, etc) could change daily. However, in future I think the Trip Monitors should be responsible for this oversight, working with their trip leaders, and requesting updates to the website and SkiGram.

For the Epic & Ikon pages, last year we had an exclusive agreement with Dan Ellis, and we listed the passes on the website “store”, which enabled our members to purchase the passes online with a credit card. However, capturing the information needed to send to Dan was cumbersome, as was keeping up with the pricing changes. Also, we ended up losing over $200, despite receiving a rebate from Dan. For the 2021 ski passes, I think we would be better off having our members purchase the passes directly from one or more of our tour operators.

**CREATING THE EVENT PAGES**

I have already taken care of the first step, which is to duplicate each of the 2020 ski trips. I first duplicated one trip, removed the resort, mountain and lodging descriptions in the Trip Details, and then duplicated that trip another dozen or so times. That was to ensure uniformity of format and style.

In the Event Details, I first updated the Title, Location, and Date in the settings on the left side. On the right side (Description) I already copied the trip Title into the first line of content and updated the photo. You may choose to add more photos for the resort village and lodging. The Trip Price and Trip Leader needs to be updated. For privacy reasons, avoid showing the contact information for the Trip Leader in clear text. Instead, highlight the Trip Leader name, then use the Link button to provide the email address.

Next, cut & paste in the descriptions of the resort, mountain and lodging. You can also embed links to resort & lodging websites as needed. Then update the number of skiers planned for the event, the air itinerary, the pricing details, payment schedules, and cancellation terms.

The Registration Form is standard for all domestic trips, may need some tweaking for international trips to capture Passport information. There are only two lift ticket options (5-day and none), and the lift ticket price is not added to the invoice. That means that the lift ticket pricing must be added manually at a later time.

Registration types & settings include the Event registration limit, which should match what is shown in the event details. When the trip is first posted on the website only the Advance Registration (members & BRSC) and the Payment in Full options should be enabled. The Ground Only option can be enabled after 10 air seats have been filled (the Trip Monitor should do this), and the Single Supplement option can be enabled whenever the trip leader requests.

Emails settings need to be updated to show the trip leader as the Event Organizer. The Event registration pending email will need to be updated later (when final payments are due).

The settings for Registrants & Invitees and for Waitlist & Settings do not need any tweaking.

**REGISTERING PARTICIPANTS**

The target date last year for enabling event registration for the ski trips was July 1. Assuming that all the website and event pages have been updated, the next step is to change the event visibility from Admin Only to Public. Each participant who registers online will receive the automated Event Registration Confirmed email. A few participants may choose to mail a paper application form and check to the Club office, in which case they will need to be registered manually. We may wish to consider doing away with paper forms in future.

**INVOICING**

Wild Apricot’s invoicing process is seamless and relatively bulletproof, up to a point. Invoices are generated by the event registration process. The invoice price is based on the registration type. Extra cost items that are embedded in the registration form, such as insurance, lift tickets, lodging upgrades (single supps), and/or pre- or post-trip excursions, will appear on the invoice as extra line items. If/when the participant submits an online payment via credit card, the website will mark the invoice as paid in full, the member’s financial transactions will show a zero balance, and our credit card processor (Authorize.net) will show the correct invoice number and payment details on their website. So far, so good.

**UPDATING INVOICES**

The website was NOT designed to process partial payments, whereas the Club’s Policy is to allow a $500 Advance Deposit, followed by one or more subsequent payments. The only way to enable the partial payments is to manually update the invoices.

This is done at the time when final payments become due 120 days before trip departure. The first step is to change each registration type from Advance Registration to Payment in Full, which will cause the website to automatically update the amount of the invoice. Once this is done the member will see that there is a balance due when they log in to the website. Since many members only log in occasionally, we need to send them a payment reminder email. The Send Notification button will automatically send the Event Registration Pending email. The email content may need to be customized as needed.

This process must be done each week for 14 to 15 consecutive weeks, and so requires over 400 manual updates. Since the trip prices no longer include lift tickets, the lift tickets must also be invoiced manually, which may require hundreds more manual invoice and email reminders to be processed.

**PAYMENTS AND INSTALLMENTS**

If the participant registers using the Payment in Full registration type and wishes to submit an online payment, they must pay the full amount; they cannot submit a partial payment. If the participant chooses to pay offline, the website will show that they have an open balance until their payment check is received at the Club office and posted to the website (by Pete).

Participants who request installment payments may need 3 separate invoice and reminder emails, adding to the amount of manual processing. Often these folks are late with their installment payments, as well. For this reason, I have recommended that we eliminate installment payments. This would require a change to Club Policy, subject to Board approval. However, there may be a way to process installment payments via Authorize.net, which needs some research. Another approach is to require that all three installment payments be submitted at one time as three separate checks, dated separately. This would streamline the process greatly.

**REFUNDS**

Refunds can be tricky. When the website sees that the invoice amount equals the total amount of the payments, it marks the invoice as “Settled”. If the amount of the payments is less than the amount of the invoice, the website will show that a balance is due. So far, so good.

Refunds are usually required when something has changed on the invoice, reducing the amount that the participants owed, and creating an overpayment by the participant. The invoice is then no longer “Settled”, and the website will remove the financial transactions from the event records. As a result, any refunds to correct the imbalance must be processed on the participant’s membership record. Once the refund has been entered, the invoice must be “Settled” again against the payments. Sometimes this is simple, but there be details that add complication such as one participant who has submitted multiple payments for multiple invoices or for multiple people. I can assist with these issues, and Wild Apricot’s Tech Support can also be very helpful.

M**ONITORING TRIP STATUS**

The trips need to be monitored on a daily basis to ensure that the information on the Status Board is both current and accurate. If the trip has been expanded or reduced to change the number of participants, the event page and the Status Board need to be updated. If a participant has cancelled, the event registration limit needs to be increased by one, and if a participant has changed to a Single Supp, the event registration needs to be decreased by one. When payments become due, invoices must be updated and payment notification emails must be sent. When participants are late in submitting payments, somebody must follow up to request payment.

As the trip gets closer to departure, “pillow management” becomes an issue. The event page and the Status Board may need to be adjusted to show status updates such as “single female needed” or “Ground Only spot available”. Often updates to the weekly SkiGram are also needed.