Promotional Packages module

MX Online has introduced new functionality to sell a pre-defined package of registrations and other transaction types online, as a single purchase. Predefining the package makes it possible to sell registrations with many of the special marketing rules that you have wanted for a long time:

- Sell registrations for a fixed number of people instead of an open ended group, as with a table for 8 or a table for 10, or a golf foursome.

- Sell registrations to multiple meetings as a single series, as with courses or a seminar series.

- Package a membership with the registrations, so registrations are sold as an automatic benefit of membership.

- Select a sponsorship level within a package and automatically have the system add the corresponding packaged transactions to the cart.

- Set a custom price for each package, by automatically assigning a promo code that the client doesn't need to know, or by setting a discounted price for registering the group as a whole.

There are four components in this new module:

- Package Listing web part
- Package Processing web part
- Package Items in the Shopping Cart
- Transfer Registrant

"Package Listing" – A New Web Part

New templates and Advanced Finds are used to list promotional packages differently in different contexts.

o The predefined templates for listing promotional packages and sponsorship packages both display an image and description included in the UX setup of the package. In addition, Promotional packages have an optional listing of the package components and a button to select the package.

o Configuration of this web part consists of the same options as a standard Product Catalog:

- Select Advanced Find View and identify any URL parameters to be used to filter. Predefined Advanced Finds that support this module have been setup to filter by Package Type, Meeting Setup ID (if applicable), publish to web, and an optional Package Grouping name that can be defined in whatever way you like.

- Select an output format – a collection of side-by-side cards or a full-width lists. Both formats adjust to the device screen size per Bootstrap responsiveness.

- Select a template, either "Promotional Package" or "Sponsorship Package". Either template can be used with any of the layout options.

  Templates for sponsorship packages display radio buttons for the different levels that are available in the package, and the user can select a level by clicking the applicable radio button before clicking the button to select the sponsorship package. Note that only a package that is setup in UX as a Package Type of "Sponsorship" will have the package levels that are displayed as radio buttons in the "Sponsorship Package" template.

o Optionally, Promotional Packages can be identified with a particular Meeting Setup, and Sponsorship Packages can be identified with a particular Event Setup (parent of a Meeting Setup). For registration packages that are specific to a meeting, the Advanced Find assigned to an instance of this web part can be configured to read the Meeting Id from the URL so only the packages that are applicable to the current meeting are displayed. The package listing can be displayed either on the Meeting home page or the Register Me/Someone else/Group web part page, depending on whether the predefined package is offered as an alternative to the open ended group registration.

o For packages that include a membership, an instance of the Packages Listing web part can be configured with an Advanced Find that selects only membership related packages, while other instances can be filtered to show only different types of packages. This filtering is based on the values in two fields that are part of the Package Setup in UX:

- The "Package Web Category" field, an option set that is system-generated and defines how the processing will handle the packaged transactions. You should not change this option set, or add to it, because the MX module depends on these specific package types.

- The "Package Grouping" field, an option set that is completely configurable by each client, to give you ways of grouping packages together, for whatever contexts you need. Out of the box, the options are the ones used for corresponding OOTB Advanced Finds. Feel free to delete, add, change these options, and modify the Advanced Finds accordingly.

Group Registration Discounts

2019 Chesapeake Bay Annual Conference - 5 Registrations

$148.75

Register a group of 5 people now and get 15% OFF!

*You can assign some or all registrant names now, or return after this purchase to assign names at a later date.

Includes

- 2019 Chesapeake Bay Annual Conference
  - Main Registration (5)

Select this Group Package

2019 Chesapeake Bay Annual Conference - 10 Registrations

$245.00

Register a group of 10 people now and get 30% OFF!

*You can assign some or all registrant names now, or return after this purchase to assign names at a later date.

Includes

- 2019 Chesapeake Bay Annual Conference
  - Main Registration (10)

Select this Group Package

Group Registration discounts can be implemented using Promotional Packages by setting up each package with a particular meeting setup, a particular quantity of registrations (select the registration type), and a predefined promotion code for each registration. In this case, both of the packages listed here are for the same meeting, but the promo code included in the package for 5 registrations is for a smaller discount than the promo code included in the package for 10 registrations, so the package of 10 is a better deal. The promo codes are automatically applied to all of the registrations in the selected package, without requiring the user to add a known code, so the discount is automatically tied to a particular group size.

After selecting the package, the user will be allowed to assign as many registrant names as the number of registrations that were setup in the package.

This would be a good example of a package listing that should be deployed on the registration page of the meeting on the same page as Register Me/Someone else/Group. These packages are an alternative to the standard open-ended group registration. Standard group registration is more flexible than a package because there is no predefined quantity of registrations, but there is no way to apply a discount for different quantities the way the package can.

Sponsorship Packages for Banquet Tables

2019 Chesapeake Bay Annual Conference - Sponsorship

Select Sponsorship Level:
- ◉ Bronze ($600.00)

  The Bronze sponsorship entitles the company to 4 registrations for the Annual Conference.
- ○ Silver ($1000.00)

  The Silver sponsorship entitles the company to a table for 8 at the banquet and full conference registration for 2 of the attendees.
- ○ Gold ($1200.00)

  The Gold sponsorship entitles the company to a table for 10 at the banquet and full conference registration for each attendee.
- ○ Platinum ($2400.00)

  The Platinum sponsorship entitles the company to 2 tables for 10 at the banquet and full conference registration for each attendee.

Amount:

$600.00

Select this Sponsorship

Annual Conference Banquet Tables for 10

Select Sponsorship Level:
- ◉ 1 Table for 10 ($1200.00)
- ○ 2 Tables for 10 ($2400.00)
- ○ 3 Tables for 10 ($3600.00)

Amount:

$1,200.00

Select this Sponsorship

Annual Conference Banquet Tables for 8

Select Sponsorship Level:
- ◉ 1 Table for 8 ($1000.00)
- ○ 2 Tables for 8 ($2000.00)
- ○ 3 Tables for 8 ($3000.00)

Amount:

$1,000.00

Select this Sponsorship

Sponsorship packages are different from Promotional Packages only in that they can be setup with multiple levels within the same package, so you can define multiple packages within a single package name. Each level has a minimum dollar amount that will be charged in the cart, and each level is setup with a particular set of packaged transactions. So when the user clicks on a radio button, they are not only selecting the dollar amount to be added to the cart, but also selecting which package of transactions will be created.

A banquet table is a package of a particular number of attendee registrations, in this case, either 10 or 8. So if the user buys the sponsorship level with 2 tables for 8, they will be allowed to assign up to 16 registrant names as part of this package purchase.

The format for this instance of the Package Listing web part is "Card decks – equal width and Height", where each package is displayed as a "card", and the height is automatically adjusted to be the same for all cards.

Learning Series

2019 Chesapeake Bay Spring Learning Series

$125.00

Register for this series of 4 classes and get **all course collateral free,** as well as an annual subscription to Chesapeake Bay Magazine.

Includes
- 2019 Chesapeake Bay Spring Learning Series - All 4 Sessions
- Intro to the Chesapeake Bay 2 (2)
- 50 page excercise/ Practice Workbook
- Downloadable Exam Sample Questions

Select this Learning Series

2019 Chesapeake Bay Quarterly Seminars – Season Pass

$95.00

Includes
- 2019 Seminar 1: April - Chesapeake Bay Hot button issues - 2018 March Seminar
- 2019 Seminar 2: June Voices of the experts - June Main Registration
- 2019 Seminar 3: September - Regulatory changes you need to know about - September Main Registration
- 2019 Seminar 4: December – Panel on recommended changes - December Main Registration

Select this Learning Series

2019 Fun With Technology QUARTERLY Webinar

$100.00

Includes
- 2019 March Seminar - Consumer Technology Boot camp - Main Registration - March
- 2019 June Seminar - Trends in fun Consumer Technology - June Main Registration
- 2019 September Seminar - Consumer technology in Recreation - September Main Registration
- 2019 December Seminar - Taking Consumer Technology to the Next Level - December Main Registration

Select this Learning Series

Not all registrations need to be for the same meeting. A Learning Series is a package of registrations, each one for a different meeting. It is like a package of sessions, where the sessions are defined as separate meetings. In this type of package, there is only one registrant for all meetings in the series. If it were different registrants and different meetings they would be unrelated transactions, not a package.

2019 Fun With Technology SPRING Learning Series
$100.00

Learners & Leaders Series Sessions Provide Access to Experts and Innovators

Join area executives and thought leaders to explore topical issues and ideas to propel your business. Our Learners & Leaders Series provides an opportunity for Savannah-area professionals to hear directly from industry leaders and national experts about today's most pressing issues. Georgia Tech-Savannah facilitates an environment that brings executives and thought leaders together to share and stimulate conversations focusing on innovative, creative, and advanced solutions. It's an unparalleled opportunity to gain their firsthand insights about topics, including: technology, innovation, sustainability challenges and solutions for port regions, safety management and its impact to your bottom line, and to how to groom your company's next leadership team.

These interactive breakfast sessions are designed for: business owners, middle- and upper-management professionals who work for mid- to large-size companies, and those who are about to transition to management roles. This series was designed to provide timely high-level education for area leaders. Learn how to engage your employees and accelerate productivity while thinking big picture.

Learning Series: Succession Planning for the Modern Workforce

Course Description

This panel discussion will detail the key aspects of developing a modern succession plan for today's workforce. It will encompass elements of human resources, fostering company culture, assessing current talent pool, workforce trends, and functioning in multi-generational gaps. From identifying and developing new leaders to hiring to fit a company's core values, you will gain the knowledge you need to adapt to the impending future wave of leaders. The session will be moderated by Suzanne Kirk, president of Employee Development Strategies, Inc. The panel will feature Al Kennickell, president of The Kennickell Group; Karin Condame, human resource director at The Landing Association; and Jim Collins of Thomas & Hutton.

Learning Series: Passion to Serve: How the Military Community Gives Back through Profit and Passion

Course Description

This panel discussion will address the concerns of the veteran workforce and highlight options for local businesses to help the cause. Marketing for small business, nonprofit fundraising, philanthropic capitalism, branding for the military community, and assessing the military talent pool will also be covered. From identifying the issues facing the veteran workforce to business development for a cause, you will learn how to create more engagement with the military community while contributing to its success. The session will be moderated by Kenya Harrison, academic program manager at Georgia Tech-Savannah. The panel will feature Tyler Merritt, co-owner of Nine Line Apparel; Kevin Ryan, CEO of Service Brewing; and Cindy Kelley, executive director of the Chatham Savannah Homeless Authority.

Includes
- 2019 Fun with Consumer Technology - A spring Seminar Series - Registration with 4 Courses

> **Select this Learning Series**

This example is also a Learning Series package, but in this case, the same "Promotional Package" template is being used, but the layout option selected is "Card Lists (full width)". This layout option allows you to accommodate as much content as you need, as if it were a content web part, which is valuable if you have to describe all of the events in the series. This entire content block is being read from the Online Description in the setup of the Package.

This package should be displayed on the Meeting Home page for all of the meetings in the series, as an alternative to registering for one meeting at a time. You can design an Advanced Find that displays this Learning Series package only if the MeetingID has a particular attribute (e.g. Meeting type) set to indicate it is part of a learning series.

Membership - Free Registration and Subscription

2019 Chesapeake Bay Individual Membership Including conference - Membership with Registration

$175.00

Includes
- 2019 Chesapeake Bay Annual Conference - Main Registration with Banquet Table Seat
- Chesapeake Bay Advocate Membership - Rockfish Rate
- Chesapeake Bay Magazine - Annual - US Mail

Join with this Package

2019 Fun with Consumer Technology - Best Bang for the buck - Registration with Membership

$315.00

Includes
- CTA: Level 1 - Fun Consumer Technologist - Annual Rate
- 2019 Fun Consumer Electronics Show - Main Registration
- CTA - Consumer Electronics Quarterly - Annual Subscription

Join with this Package

"Package Processing" – A New Web Part

When you select any package of any type, you are directed to a page with the "Package Processing" web part. This web part has several functions:

- <u>Display the packaged transactions</u> that could require additional action from the user, such as identifying registrants.

  - o The Packages web part automatically defaults each of the registrations in the package to a designated "placeholder" contact so if the user does not want to name the registrants right away, the registrations can be created in UX anyway in this temporary status, until the names are assigned at a later date.

  - o The user has the choice to either assign specific named contacts right away, or go directly to cart and come back later to change names at any time. Any number of registrants can be named or left unnamed at this point.

  - o Other types of transactions, such as membership join or bundled products, are displayed with the registrations, but they do not require action by the user in this web part.

- <u>Allow the user to identify registrants.</u> All registrants are contacts, unlike guests, so you either select an existing contact or add a new one.

  - o When assigning a contact to a registration, you can start typing and autofill will suggest existing contacts that start with the entered text (first name and/or last name), similar to searching via Google.

  - o If you click the " + " button, a form opens for you to create a new contact. All that is required is first name, last name, and email. Additional contact information is entered as part of the registration process. Duplicate checking ensures that the user cannot create a contact that is a duplicate of an existing contact.

- <u>Send the package line items to the Shopping Cart</u>. At any point, before or after identifying the group registrants, you can click "Check-Out" to add the package to the cart and proceed to the Shopping Cart page.

- <u>Allow the user to add registration options to each of the registrants.</u> Optionally, you can click the "More" button to add registration options to some or all of the registrants, including badge, questions, sessions and guests. Note that the "More" button is only active for registrants who have been named.

ⓘ Not secure | mxr2gresponsivetemplate.ptassoc.com/Shop/Packages/Package-Processing/PackageId/241d981f-9a8a-e811-80e2-00155da80b72/LevelAmo...

M 🦘 New Template Site ▦ MXR2GQA82 ▥ MXR2G Template Site 🅟 MX R5.6 UX 8 R2GO ▦ UX for MX R5.6 📒 MX 8.2 Site classes 🅱 Bootstrap 🔵 Join me

⚙ Configure

TBOT Annual Conference Banquet Tables for 10

You will pay: $1200.00

This is just a test to see if Text entered into the back office Online Description WYSIWYG editor will display as expected in theSponsorship Setup on this page. Note that there is an image in the 'Image' field named **150x150_meeting2.jpg** that does exist in the Portals/0/Images/**Events** directory

Registrant: SuperUser, Protech T.

Details

Before checking out, note that you can assign a customer for each of the packaged transactions listed below. To assign a registrant, click the X to remove the current registrant then just start typing. When you have entered at least 3 characters, you will see a list of matching names you can select from. Click the + button to add a new record.

2019 Annual Conference Event - Full Conference Registration - Meeting Registration

| SuperUser, Protech T. ✕ | ➕ Add |

| **** Unassigned **** ✕ | ➕ Add |

| **** Unassigned **** ✕ | ➕ Add |

| **** Unassigned **** ✕ | ➕ Add |

| **** Unassigned **** ✕ | ➕ Add |

| **** Unassigned **** ✕ | ➕ Add |

| **** Unassigned **** ✕ | ➕ Add |

| **** Unassigned **** ✕ | ➕ Add |

| **** Unassigned **** ✕ | ➕ Add |

| **** Unassigned **** ✕ | ➕ Add |

Save All - Next Step

⚙ Configure

TBOT Annual Conference Banquet Tables for 10

You will pay: $1200.00

This is just a test to see if Text entered into the back office Online Description WYSIWYG editor will display as expected in theSponsorship Setup on this page. Note that there is an image in the 'Image' field named **150x150_meeting2.jpg** that does exist in the Portals/0/Images/**Events** directory

Registrant: SuperUser, Protech T.

Details

Before checking out, note that you can assign a customer for each of the packaged transactions listed below. To assign a registrant, click the X to remove the current registrant then just start typing. When you have entered at least 3 characters, you will see a list of matching names you can select from. Click the + button to add a new record.

2019 Annual Conference Event - Full Conference Registration - Meeting Registration

SuperUser, Protech T.	⇄ Assign Registrant + Additional Options
**** Unassigned ****	⇄ Assign Registrant
**** Unassigned ****	⇄ Assign Registrant
**** Unassigned ****	⇄ Assign Registrant
**** Unassigned ****	⇄ Assign Registrant
**** Unassigned ****	⇄ Assign Registrant
**** Unassigned ****	⇄ Assign Registrant
**** Unassigned ****	⇄ Assign Registrant
**** Unassigned ****	⇄ Assign Registrant
**** Unassigned ****	⇄ Assign Registrant

Checkout

Additional Options

Packaged Registrants can have details added through a new one page registration that includes the badge and questions. Sessions and guests cannot be added through this page, however, because those are new transactions that would have to be processed in a separate section of the cart.

⚙ Configure

⚙ Configure

< Save and Return to Registrant List

⚙ Configure
Registrant Information

⚙ Configure
Registration Questions

Save Cancel

GEORGE
George Smith
Bills Insurance Agency
120 S Main St
Sheffield, IL 61361-9357

☎ 815-454-2501 ✎

⚙ Configure

< Save and Return to Registrant List

Package Items – A New Transaction type in Shopping Cart

Package Items are displayed in the cart alongside other transaction types, but they are processed differently, according to the package setup and processing rules for adding a promotional/sponsorship package to a UX invoice. Package details are not displayed by default, only the name of the package. If you click the link to "see details", the contents of the package are displayed, showing registration type, names, and the number of unassigned registrations.

Product	Unit Price	Quantity	Subtotal		
2019 June Seminar - Voices of the experts (June 1, 2019 - June 1, 2019) Blair, Paul see details			$25.00	✏️	🗑️
2019 June Seminar - Voices of the experts (June 1, 2019 - June 1, 2019) Cartwright, Joe see details			$25.00	✏️	🗑️
2019 June Seminar - Voices of the experts (June 1, 2019 - June 1, 2019) Dempsey, Rick see details			$25.00	✏️	🗑️
1WideProduct 150 x 250	$1.00	1 ▾	$1.00	✏️	🗑️
2018 Chesapeake Bay Quarterly Seminars – Season Pass Tables for 10 see details			$95.00	✏️	🗑️
2019 Chesapeake Bay Annual Conference - Sponsorship see details			$1000.00	✏️	🗑️
Total			**$1171.00**		

2019 Chesapeake Bay Annual Conference - Sponsorship   ✕

2019 Chesapeake Bay Annual Conference Event - Full Conference Registration

Weaver, Earl I.

Gates, Bill

2019 Chesapeake Bay Annual Conference Event - Banquet Table Seat

▪ Hoffmeister, Susan

Santiago, Pablo

**** Unassigned **** (4 seats)

Chesapeake Bay Annual Conference
(October 28, 2019 - October 31, 2019)
SuperUser, Protech T. see details

Banquet Table Seat	$25.00
Registration Only	
Banquet Table Seat	$0.00

TBOT Annual Conference Banquet
Tables for 10 see details

Smith, George
Jones, Kerry
Harris, Frank
**** Unassigned **** (17 seats)
2019 Annual Conference
Event - Full Conference
Registration

Total

"Transfer Registrant" – A New Option in My Registrations

- After the package has been purchased, the user can view the individual registrations from My Registration, and assign a new registrant contact from My Registrations, at any time until the meeting starts. This Transfer Registration can be used to replace the placeholder contact with a specific contact or to reassign registration from one contact to another.