

## Updated SUMS Support Guides

A total of 3 guides have been provided to our users for review. This document includes 2 of these guides:

1. How do I build my event dates?
2. How do I create single event tickets?

A 3<sup>rd</sup> guide entitled '**What can I see on my main events dashboard?**' has been provided within the link to the Figma design of the new SUMS Knowledge Base [here](#). This guide will give you an idea of how the newly structure guidance will fit into a newly designed Knowledge Base.

This guide, along with the 2 included within this document, all reflect the new structure and content envisioned for the new SUMS Knowledge Base.

These guides endeavour to provide a streamlined user journey, making it easy for users to navigate through written resources to find the answers to their queries.

The guides provided show a mixture of sequential, instructional guidance and informative content which reflect the most appropriate structure and language dependant on the type of guide.

## What do I need to consider?

When reading the updated support documentation, it may help to consider some of the following points:

- Is this guide easy to follow?
- Is the information that I would expect to see in this guide available?
- Is it clear to me what this guide covers and what may not be covered, and where I may need to go to find alternative information?
- Where the guide includes step-by-step guidance, am I able to successfully follow these steps? Are all steps made clear to me?
- Would I feel confident providing this guidance to a new member of staff as part of their training?

**Please note:** *The guidance provided may not reference features/functionality that have recently been implemented or updated since June 2024. Finalised documentation will be updated to include relevant guidance prior to the launch of the SUMS Knowledge Base.*

We appreciate that your knowledge of these areas will be different, you may be well acquainted with the Events module or completely new to its functionality. Either way, we value the insight of all of our users to ensure our guidance is appropriate for users of various skill levels and knowledge.

There are also a few elements listed below for you to consider:

- Text that is [highlighted blue](#) and underlined represents text that will be hyperlinked to other guides. These are not currently functional, and you will not be able to access these guides, however this gives users an idea of how related guides will be referenced throughout.
- Blocks of text that include an icon alongside are shown within the Figma design as being held in relevant blocks, e.g:



You will only see this option if you hold more than one website where you may sell event tickets.



**Tip:** If you need easy access to key events, you can pin certain events to your dashboard and they will appear alongside your upcoming and popular events. Take a look at our guidance on [how to pin events](#) for further information!

## Submitting your Feedback

Once you have read through these guides, please do submit any feedback you may have via our survey [here](#).

Take into consideration both the design and intended content of the new SUMS Knowledge Base and let us know your thoughts!

Thank you very much from the SUMS team for taking the time to feedback!

# How do I build my event dates?

This guide covers how you can build your [event dates](#) once you have created your [parent event](#), including information such as:

- Event venue
- Where you are selling tickets
- Maximum capacity for your event
- Assigning a seating plan to your event date

This guide does not cover the following elements, but we have linked them to their support articles for easy access:

- [Creating recurring event dates](#)
- [Single ticket creation](#)
- Any details that are created and managed in Event configuration. We would highly recommend you take a look at the [events configuration article](#) to familiarise yourself with the elements of events you must create and manage in configuration, such as venues and brands/affiliations.

## Where do I modify/create my event dates?

Once you have built your parent event, you can move onto the **Dates** tab of your event.

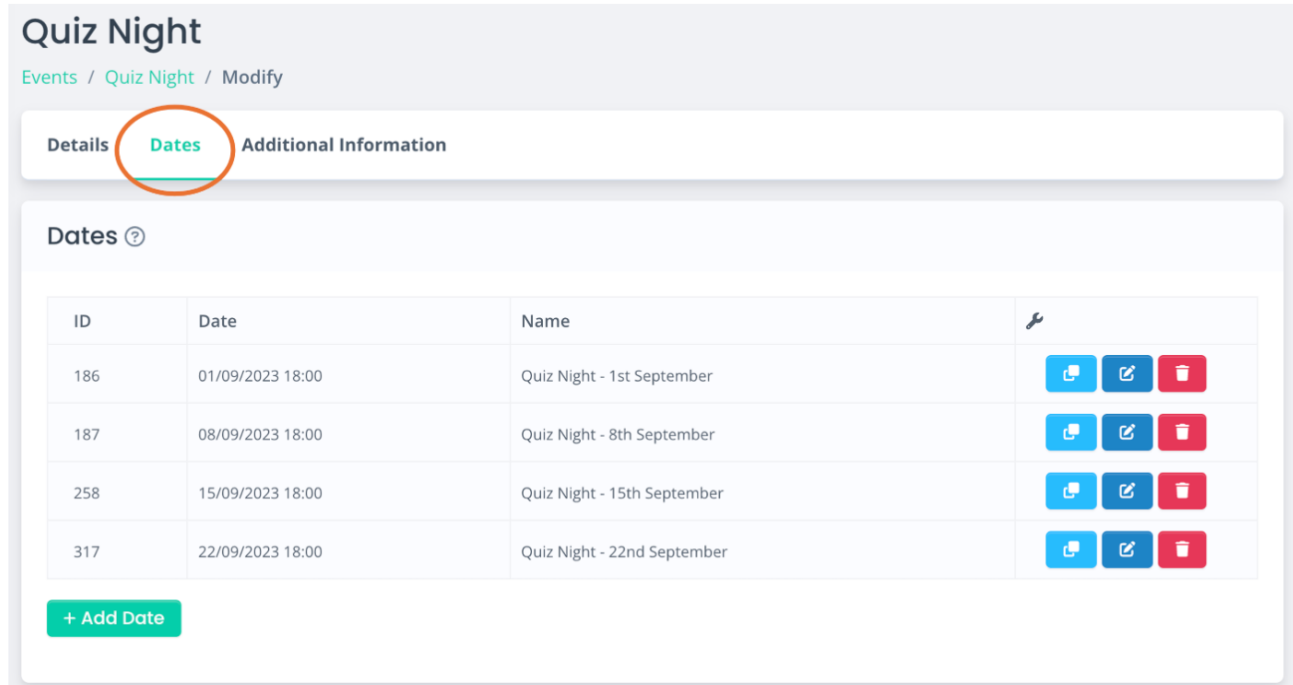


Figure 1: Image showing the 'Dates' tab held within a parent event.

You will see that one event date has already been created for the dates that you entered when you created your parent event.

If you need to create a new event date, you can do this by either:

- Clicking the **'+Add Date'** button
- [Setting up a recurring event](#) (we will not be covering recurring events in this guide)
- Duplicating an existing event date

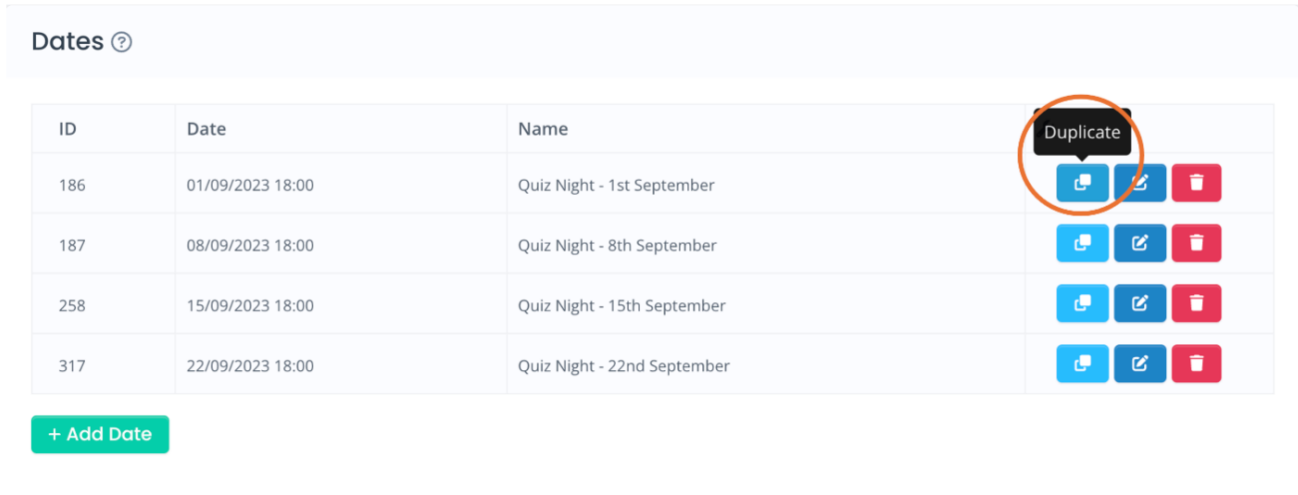


Figure 2: Image showing the 'Duplicate' button available against an event date.

Go ahead and create a new event date, or click **'Modify'** to start editing an existing date. You will see the following options for you to complete:

1. **Name**
2. **Start and End Dates**
3. **Doors Open** – You can add a date and time for when your doors open if you would like to display this to prospective event attendees
4. **Soundcheck At** – You can add a date and time that a soundcheck may be held for reference
5. **Venue** – Select the relevant venue from the dropdown
6. **Are you selling tickets externally?** – If you are selling tickets externally (e.g. via TicketMaster or SeeTickets) select **'Yes'** and enter the web address where the tickets will be sold. If you are selling tickets externally, you will still need to complete the next step
7. **Where would you like to sell tickets?** - You will need to confirm here which website you will be using sell (or advertise) tickets. Your Union may have separate websites for each of your SU venues, and you sell tickets to your events based on where they are being held. If this is the case, you can select which website you wish to sell tickets through. If you are selling tickets externally, you will still need to select which website you wish to advertise the sale of your tickets on, and customers will then be directed to the external link you have added in the previous step



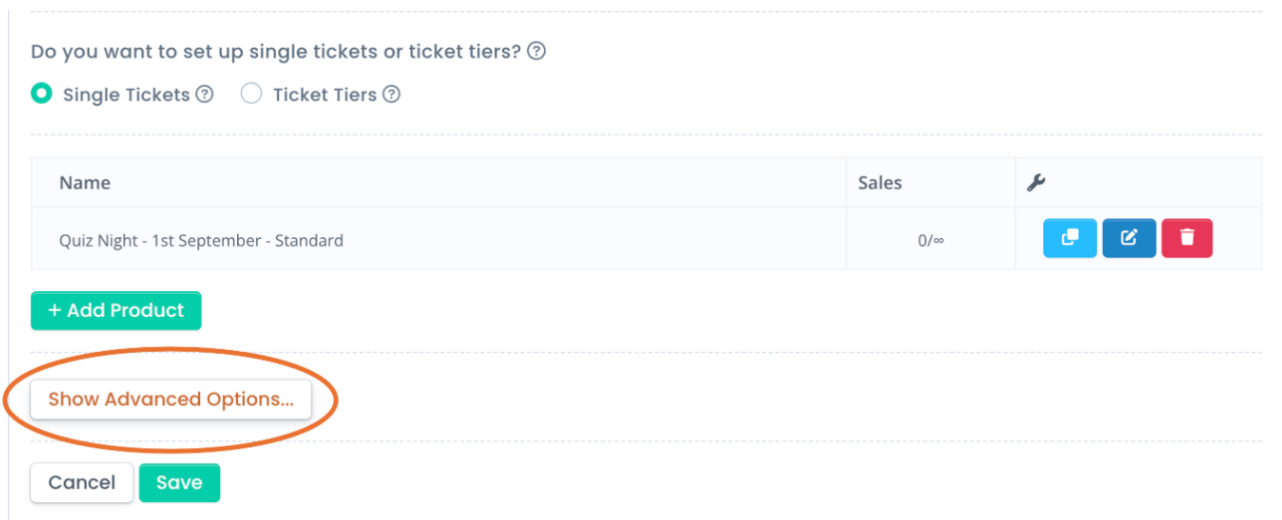
You will only see this option if you hold more than one website where you may sell event tickets.

8. **Is there a maximum capacity for your event?** - If there is a maximum capacity for this event, enter the figure here. When you create your tickets, this will be the maximum number of tickets that you can sell for this event date, and your total ticket sales will not exceed this number

The next option you come across will be to create your event tickets. Event tickets are created within your event dates, however we will not be covering ticket creation in this guide. [Here](#) is a link to our guidance for further information on how you can create your event tickets.




Once you have completed the above information and created your tickets, you will have the option to add some advanced details to your event date.

Simply select '**Show Advanced Options**' to view the additional options you are able to edit:



Do you want to set up single tickets or ticket tiers? ⓘ

Single Tickets ⓘ  Ticket Tiers ⓘ

Name	Sales	
Quiz Night - 1st September - Standard	0/∞	  

[+ Add Product](#)

[Show Advanced Options...](#)

[Cancel](#) [Save](#)

1. **Is this date visible?** - You can hide an event date if you don't wish for it to show on your website; simply select '**No**', and this can be changed at any time if you need to advertise the date later down the line
2. **Is this a seated event?** - If you wish to assign a seating plan to your event date, this can be selected here. When creating your event tickets, you will then need to assign the relevant ticket products to the seats that they apply to. See [here](#) for further guidance on how to set up seating plans for your event
3. **Allow free entry?** - Select whether you want to allow free entry to the event. If this is selected, people can be scanned into the event via their member pass (if you use the SU App) and they won't require a ticket
4. **Allow free entry to a report of people?** - You can grant free entry to only a certain group of people by using a report if needed. See [here](#) for further guidance on how you can set up free event entry, and what this will look like when you need to scan people into your event
5. **Do you want Groups/Activities to help sell your tickets?** - This option relates to the Buy Back feature that can be used to reward your Activities and Student Groups for attending certain events. This feature requires some configuration, so take a look at the [Buy Back](#) guidance for further information on how you can set this up and apply it to an event

Now you have built an event date for your event. Remember, you can have as many event dates held under an parent event as you need, and the configuration of these event dates can all be modified to suit their individual requirements.

# How do I create single event tickets?

This guide covers how you can create single event tickets to put on sale for your events, including information such as:

- Who you want to sell your tickets to
- How you want to sell your tickets
- Adding product rules
- Adding extra capture fields to your ticket products to obtain further information from your ticket purchasers



This guide does not cover the creation of ticket tiers. If you think you might need to create a ticket tier, take a look at the guidance below for further information:

- [What is a ticket tier and what can I use this for?](#)
- [How do I create a ticket tier?](#)

## Creating a new ticket product

You can create new ticket products when you create and modify your individual [event dates](#). The option to create tickets for each of your event dates can be found after you enter the maximum capacity of your event:

The screenshot shows a form titled "Dates" with the following fields and options:

- Name:** Quiz Night - 1st September
- Start Date:** 01/09/2023 18:00
- End Date:** 01/09/2023 20:00
- Doors Open:**  dd/mm/yyyy hh:mm
- Soundcheck At:**  dd/mm/yyyy hh:mm
- Venue:** Select a venue... (Add New)
- Are you selling tickets externally?:**  Yes  No
- Where would you like to sell tickets?:** Main Website (x)
- Is there a maximum capacity for your event?:**  Unlimited
- Do you want to set up single tickets or ticket tiers?:**  Single Tickets  Ticket Tiers

Name	Sales	Actions
Quiz Night - 1st September - Standard	0/∞	

Buttons: + Add Product, Show Advanced Options..., Cancel, Save

Figure 1: Image showing where single tickets are created within an event date.

To start creating a new, single ticket:

1. Select the option to create **Single Tickets**
2. Click '+ Add Product' to create a new ticket
3. Select which EPOS zone you would like this ticket to be held under

Once you have done this, a pop-up will appear on the screen for you to build your ticket product.

This will be split up into the different areas of the product that you will need to set up, such as the basic information, finance details and communication options.

We'll start with the **Basic Ticket Information** and work our way through each section:

## Basic Ticket Information

Within the basic information section of your event you will be able to add the following details:

1. **Ticket Name**
2. **Ticket Caption** - Enter a brief caption for your ticket (this will appear on the order confirmation that is sent to ticket purchasers)
3. **Fixed Price** - If you are selling your ticket online, or you have a fixed price for your ticket, you will need to enter the price of your product here. However, if you would like to sell your product offline only (via your EPOS tills) and define the price at the point of sale, you can keep this option blank. This will allow you to enter the price you wish to sell the ticket for on your till prior to the customer completing their purchase
4. **When do you want to sell your tickets?** - Set the dates/times that you want to sell your ticket, or if you want your ticket on sale indefinitely, you can leave these fields blank (you can add/edit these dates later on if you need)

## Shop Options

Next, you will move onto **Shop Options**, where you will set up the number of tickets you have to sell, who you are selling your tickets to and how you will be selling your tickets.

1. **Are there a limited number of tickets?** - Set if there are a limited number of tickets to sell, or if there is no limit, you can leave this blank. Remember, if you have set a maximum capacity for your event date, the number of tickets you put on sale in total cannot exceed this figure.
2. **Ticket Details** - Enter any specific details that you want to be included on the ticket when it is sent to purchasers
3. **Where do you want to sell your tickets?** - Select where/how you want to sell your event ticket (you can select multiple options if you need):
  - Online - Sell your event ticket via your website/SU App
  - Offline - Sell your event ticket via your EPOS tills
  - Door Entry - Sell your event ticket via your EPOS tills when your till is in door entry mode (see [here](#) for further guidance on how you can sell event tickets on the door)

4. **Who do you want to sell your tickets to?** - Select who you would like to sell your event tickets to (you can select multiple options if you need):
- Student Members - Requires members to either be logged in as a student to purchase the ticket (website/SU App), or requires their student card to be scanned via the till if purchasing a ticket offline
  - Associate Members - Requires members to be logged in as an associate to purchase the ticket (website/SU App), or requires the Associate ID to be selected on the till prior to purchase
  - Guest Members - Guest Member purchases can only be enabled for online ticket purchases that are being sold via a website that has a [Public Login](#) enabled
  - Public - Anyone who visits your website can purchase the ticket without being logged in, and you can sell public tickets via your tills without any requirements
5. **Allow [Affiliations](#)** - If you have assigned a Brand to your event, you can decide which of your event tickets can be sold by your Activities/Student Groups through their affiliation links. This feature requires some configuration, so take a look at the [Brands](#) guidance for further information on how you can set this up and apply it to an event
6. **Would you like to restrict the sales of this ticket?** - You may need to restrict the sales of your ticket to particular members. Here, you can select a report of members to restrict sales to so only they can purchase the product



You will need to make sure that you have also chosen the relevant member types to sell your ticket to, to accompany the report you may select here. For example, if you are restricting the sale of your ticket to a report of members that include both student and associates, you will need to ensure that you have selected these audiences under **Who do you want to sell your tickets to?**

**Modify Product** [Close]

**Shop Options** [Minus]

Are there a limited number of tickets?  
 10  
This value will not decrease for event ticket sales.

---

**Ticket Details**  
 additional information  
This information will appear on the ticket sent to the customer

---

Where do you want to sell your tickets?  
 Online ?  
 Offline ?  
 Door Entry ?

**Who do you want to sell your tickets to?**  
 Student Members ?  
 Associate Members ?  
 Guest Members ?  
 Public ?


---

Allow Affiliations

**Would you like to restrict the sales of this ticket?**  
 Restrict to report of members ?  
 Group Test [X] [v]  
You must select a report that has been cached, otherwise no one will be able to buy this product.  
Note: This restriction is only available on the online store.

Figure 2: Image showing the 'Who do you want to sell your tickets to?' and 'Would you like to restrict the sales of this ticket?' options available when creating an event ticket.

7. **Would you like to assign this ticket to a group?** - If you are creating an event ticket that is being sold by an Activity/Student Group, you can assign the ticket to the relevant group. This will ensure all sales are registered to that group as if they had created the ticket themselves
8. You will also then have the option to **Restrict Sales to this group** - You may need to restrict the sales of your ticket to a specific Activity/Student Group. which will allow only members of that group to purchase tickets

 If you restrict your ticket sales to a specific group, the same note as the above will apply; you will need to ensure that you have selected the relevant audience under **Who do you want to sell your tickets to?** For example, if you want to sell tickets only to the student members of this particular society, you will need to ensure that only students are selected.

9. **Is your ticket restricted to a certain age?** - Here you can apply an age restriction to your ticket product so only members who meet the restriction can purchase the ticket. You can also select the **'Check Age?'** checkbox to enable a flag when scanning members into an event, so users scanning members will be notified if a member does not meet the age restriction. See [here](#) for further guidance
10. **Do you want to add an image to the product page on your website?** - You can upload a specific image if you would like this to show alongside the ticket product on your website/SU App



The information and images that appear on your product pages on your website will depend on your web development. If you are unsure what details and images will appear on your website and where, get in touch with your web developer. The setup of the SU App is standard.

11. **Product Categories** - Next you will need to select the relevant product category for your ticket product. These categories are created and managed via your EPOS module

## Shop Finance

The next section you will need to complete is **Shop Finance**, where you will first assign the relevant financial coding and information:

The screenshot shows a 'Shop Finance' configuration form. At the top left is the title 'Shop Finance' and at the top right is a green minus sign button. Below the title are several input fields: a 'Department' field with a search icon, a 'Nominal' dropdown menu with the text 'Please select a nominal...', a 'VAT' dropdown menu with the text 'Please select a VAT rate...', a 'Period' dropdown menu with the text 'Please select a period...', and a 'Project' text input field.

Figure 3: Image showing where the finance coding and information are added to an event ticket in the Shop Finance section.

To add a **Department**, simply use the search function to find the correct department code. You will need to select the correct company and cost centre, and then select the correct department code from the dropdown.

You can then enter your remaining financial coding, along with a relevant financial period and project code (if applicable) before moving onto the additional options you have available in this section.


You will then have the following options to configure if needed:

1. **Replenish Stock** - If you would like to allow the resale of any refunded/revoked tickets you can select this option, and this will ensure any tickets that have been refunded/revoked will fall back into the pool of available tickets so these can be repurchased
2. **Administration Fees** - Next you will be able to set up the appropriate admin/booking fee for your ticket. Take a look at our [guidance](#) on administration fees for further information on the options you have and how you can configure these before applying them to your ticket
3. **Delivery Fee** - Select this option if you would like to apply a delivery fee to the product. This will apply the global delivery fee that you may have set up within your settings in System Configuration. Take a look at our guidance on [setting up a global delivery fee](#) for further information


## Shop Rules

The next section is **Shop Rules**, where you will assign any product rules that you need to apply to your ticket, along with a few other options:

1. **Rules** - Select any product rules that you need to apply to your ticket product from the existing rules you have set up. For example, if this is for a sporting event, you may need to ensure that prospective attendees have purchased an insurance product first before purchasing an event ticket

 You may wish to take a look at our article on [product rules](#) for further information before you proceed, which provides guidance on what product rules can be used for and how you can set up new rules to apply to your products and event tickets.

2. **Require Groups to be selected at the point of purchase** - You can enable this option if you need members to select which Activity/Student Group they are a part of before purchasing their ticket
3. **Member Restriction** - If you only have a small number of members that should be able to purchase this product, you can select these members here. For example, you may have a special priced ticket that you are making available only to a handful of members

 When restricting a ticket product to only specific members, you can either use the **Member Restrictions** field or add a report within **Shop Options**; these two options cannot be used in conjunction with one another. The **Member Restrictions** field will override any report that may have been selected.

## Publish/Communications


Within the **Publish/Communications** section you have a couple of options:

1. **Send Additional Email to purchasers** - Enter the content of an additional email that you may wish to send to ticket purchasers
2. **Description** - Enter an additional description/information that you would like to appear alongside your ticket product on your website/SU App

## Additional Options

The **Additional Options** section provides you with a few extra settings that you may wish to make use of:

1. **Reward Scheme** - You can create digital reward cards for students to purchase memberships to, and you can create benefits to grant free entry to certain events if you wish. If you have a reward card that contains a free event benefit you can select here if you would like this event to be included

 Take a look at our guidance on [how you can create reward cards](#) for further information on how you can reward your members and the benefits you can create.

## Extra Capture Fields

The final section is where you can add any relevant extra capture fields that you need to include for your product.

Extra capture fields can be used to request further information from your customers when they are purchasing your ticket. For example, you may be holding an awards night where you need to give attendees menu options to select from and request confirmation of any dietary requirements.

All of the extra capture fields you have created will be listed here for you to choose from.


## Submitting your Ticket

Now you have completed all of the relevant information for your ticket product, you can go ahead and click '**Submit**' to create your new ticket.

If you haven't completed any mandatory fields, the form will error and confirm which fields require your attention before submitting and saving your new ticket product.

Your ticket will then go on sale during the sale dates you have set, or, if you have left the sale dates blank, will go on sale straight away.

You can make any adjustments to your ticket products prior to and during their sale dates.

 However, please remember that this will not retrospectively adjust any purchases that may have already been made. For example, if you adjust the financial coding of your product after purchases have been made, only transactions made after these changes will have the new financial coding applied to them.