

Set-up events and confirm bookings

Once the Regional Business Partner (RBP) has decided to support a business with a voucher the business will need to identify what training they will undertake.

If a business decides that a registered service you offer is suitable for them, the business will discuss their needs with you. Based on this discussion you must set up an event under the relevant service and the business must book and apply their voucher to the specific event.

Events must be set up and vouchers booked on the event before the training takes place. An Event can be created for a workshop where multiple people will attend or for one to one training.

Create an Event

1. Click the 'SERVICES' button on the left of your home page and find the service the business wants to use.
2. Click the 'VIEW' button next to the service that you want to create an event for. You should then see the 'Service Details' page.

Name	Registrations	Total Vouchers Claimed
BECOME FREE Grow by Design	1 categories registered	0.00
PERFORMANCE TEAM	1 categories registered	7350.00

3. Click the 'CREATE EVENT' button on the left of the page.

Home > Services > Service Details

HOME	Service	
EDIT SERVICE	Service Name	BECOME FREE
VIEW FEEDBACK	Registration Status	1 categories registered ?
CREATE EVENT	Eligible For Subsidy	<input checked="" type="checkbox"/>
HELP	Description	
CANCEL SERVICE		

4. Enter the event details.

- **Event Type:** what type of event is delivered (Workshop, Course, One on One).
- **From:** the date that training will begin. These must be in the future.
- **To:** the date that training is planned to be completed.
- **Location:** the venue where the training is to be held.
- **Reference:** a unique code which you will give to the business. This can be used by businesses in the 'key word' search field in the Marketplace to find the event.
- **Instructor:** the name of the person delivering the training.
- **Contact email:** booking and/or cancellation notices will be sent to this email address.
- **Price (ex GST):** enter total cost of the event ex GST the Regional Business Partner will issue the voucher for up to 50% of the price. If the pricing is per person (i.e. for a workshop), the amount you enter in this field is the price per person. If you are delivering a one to one event and the total cost is the same regardless of the number of attendees, then the total price of the Event (excluding GST) will be value you enter. During a booking the business can add multiple attendees. If the price is per person the total cost of the booking will be calculated by "Price x number of attendees".
- **Price is per Person:** select this if you have entered a 'per person' price in the price field.
- **Private Event:** select this if you want the event to be only visible to one selected business. Useful for 'one to one' events that have been negotiated directly with a business and are not openly displayed on the Marketplace. If you tick the Private Event box, a new field will be displayed immediately below the tick box, named 'Visible to Business'. Type the first 4 characters of the business's Legal or Trading Name, a drop box will appear showing all registered businesses starting with these characters. Choose the business you will be providing training to **NOTE: If a business has not registered on the website, their name will not be visible in this list, in this instance contact the Regional Business Partner.**
- **Number of Sessions:** the number of sessions training will be delivered over. Exact training dates do not need to be entered into the system.
- **Additional Details:** any other information regarding the event that may be useful to the business.

5. Click SAVE. You can view/edit the Event details the bottom on the particular services page.
6. Contact the Business and provide them with the Event Reference so they can find the event in the Marketplace and book. **Note: An email is NOT generated when the event is created, you must contact the business directly.**

BOOKINGS

Confirming/Cancelling bookings

Once the business books on the event you will get an email and a notification will appear on your HOME page showing you have a booking that needs confirmation.

1. From your Home page click 'CONFIRM' to open up and view the booking. (If you receive an email but there is no notification waiting on your home page, look under bookings by clicking the 'Bookings' button on the left of the home page).
2. Enter your own reference details in the Provider Reference field (this step is optional).
3. Check the details and click 'Confirm' at the bottom of the page to finalise the booking or 'Cancel' to cancel the booking.
4. A System Generated email notification is sent to the business confirming the booking.

The screenshot shows the 'Home' page of a system. On the left is a navigation menu with buttons for HOME, SERVICES, BOOKINGS, VOUCHERS, REPORTS, PROVIDER DETAILS, USERS, and MARKETPLACE. The main content area is titled 'Bookings To Confirm' and contains a table with the following data:

Event Name	Voucher Code	Booking ID	Date Booking Made	Total Cost of Service	Voucher Value Allocated
Business Planning 201	CAN21	141	Wednesday, 4 April 2012	\$500.00	\$250.00

Below the table is a 'Claims' section with buttons for 'HOW TO MAKE A CLAIM', 'CLAIM VOUCHERS', and 'CLAIM HISTORY'. To the right of these buttons is another table:

Fund Name	Total Voucher Value	Vouchers Remaining To Claim	# of Overdue Events to Claim For
NZTE CDVS 2013-2014 - 13/14	\$3,850.00	\$1,450.00	2

A red circle highlights the 'CONFIRM' button in the 'Bookings To Confirm' table.

Cancelling a Booking

1. Click on the 'BOOKINGS' button on the left of your home page. This will provide a list of all bookings made by businesses on all your events.
2. Search for a booking by entering a business name in the search field provided, or sort the data A-Z, or Z-A, by clicking on the blue filters at the top of the list.
3. Click 'View' next to booking you want to edit/cancel and choose the relevant action from the menu on the left.
NOTE: Bookings that have already started/completed cannot be cancelled. Ensure you liaise with the client prior to cancelling a booking.

Edit or Cancel Events

1. From the HOME page, click SERVICES and find the relevant service.
2. Click the 'VIEW' button next to the service. At the bottom of the Service Details page you will see all the Events created under this service.
3. Click on the VIEW button to the left of the event.
4. Select EDIT or CANCEL from the buttons on the left.

EDIT	Event Details	
CANCEL EVENT	Provider	Corporate River
	Service	BECOME FREE TO UNLOCK YOUR BUSINESS POTENTIAL - coaching
	Event Reference	Test Reference
	Type	Course
	From	Friday, 21 November 2014
	To	Friday, 21 November 2014
	Location	Wellington
	Instructor	Test Instructor
	Contact Email	testemail@gmail.com
	Private Event	<input type="checkbox"/>
	Price (excl. GST)	\$500.00
	Pricing is per Person	<input checked="" type="checkbox"/>
	Number of Sessions	1
	Additional Details	

- a. Click CANCEL: confirm that you wish to cancel the Event. This will prompt an email to be sent to any businesses booked on the event advising the Event has been cancelled.
- b. Click EDIT: edit the details that need changing

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