Events

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Tool Search: Events

The Campus Mobile Payments app is used to pay for purchases using a credit or debit card. The purchase and payment can be recorded on a mobile device such as a smartphone or tablet. A BBPOS card reader is used to swipe the credit/debit card.

The app can be used at an event hosted by a school or the district. For example, a mother purchases basketball tickets with her credit card or a father uses a debit card to purchase cookies at a bake sale.

These events are created using the Events tool. Before you can create an event, make sure the Mobile Payments checkbox is marked in Categories and General Product.

▸ Click here to expand...

Read - View the individual events.

Write - View and modify existing events.

Add - View, modify, and add new events.

Delete - View, modify, add, and delete existing events.

Viewing Events

The initial view of the Events tool is a summary list of all events. This summary list provides a preview of the event's information and its status.

The **Timeframe** and **Filters** fields are used to display certain events.

Option	Description

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Timeframe	Events can be viewed based on the time they occur.
	• **Previous**
	    ◦ in a **Draft** status where the event's Start Date and End Date are in the past and the user has completed Step 1 Create an Event only.
	    ◦ in a **Completed** status where the event's Start Date and End Date are in the past.
	• **Current**
	    ◦ in a **Draft** status where the current date is between the event's Start Date and End Date and the user has only completed Step 1 Create an Event.
	    ◦ in an **Active** status where the current date is between the event's Start Date and End Date and the user has completed Step 1 Create an Event and Step 2 Event Layout.
	• **Upcoming**
	    ◦ in a **Draft** status where the event's Start Date and End Date are in the future and the user has completed Step 1 Create an Event only.
	    ◦ in a **Ready** status where the event has been set up completely (Step 1 Create an Event and Step 2 Event Layout) and the Start Date and End Date are in the future.

Filters	You can further narrow the number of events that display by using the following filters:
	• **Event Name** - type all or part of an event's name.
	• **Categories** - select a School Store category. If the Mobile Payments checkbox is marked on a Category, it will display as an option in the list. Multiple categories can be selected.
	• **Event Status**
	    ◦ Active - current date is between the event's Start Date and End Date.
	    ◦ Completed - current date is after the event's End Date.
	    ◦ Draft - the event is not completely set up.
	    ◦ Ready - the event's Start Date is in the future.

Step 1 Create an Event

Events, such as a basketball game or a bake sale, must be set up using the **Events** tool. If a staff member has access to all schools, they can set up and view events for any school within the district. If they have access to certain schools only, they can set up and view events for just those schools.

The first step to creating an Event is to define the parameters. To add an event, click the **New** button.
Result
The New Event window displays.

Field Descriptions

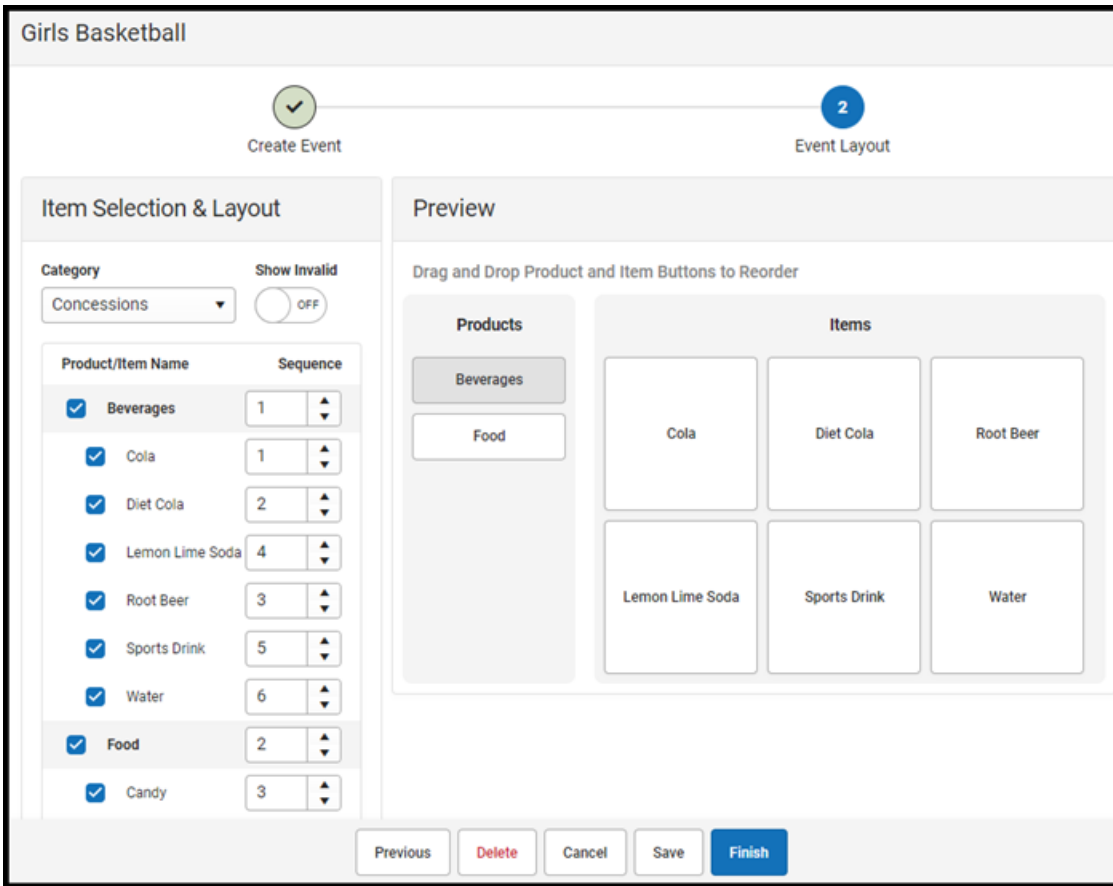| Field	Description
Event Name	*Required*. The name of the event with a maximum of 50 characters.
Status	The **Status** of an event will vary depending on the current date and whether Step 1 Create an Event and Step 2 Event Layout have been completed. Events with a Timeframe of Previous, Current, or Upcoming may have one of the statuses listed below: • **Active** - The current date is between the event's Start and End dates, and Step 1 Create an Event and Step 2 Event Layout have been completed. • **Completed** - The current date is after the event's End Date and Step 1 Create an Event and Step 2 Event Layout have been completed. • **Draft** - the event is not completely set up. • **Ready** - the event's Start Date is in the future and Step 1 Create an Event and Step 2 Event Layout have been completed.
Description	A description of the event with a maximum of 500 characters. The **Description** displays in the Mobile Payments app after the Event PIN is entered.
Start Date	*Required*. The date the event begins. If the **Start Date** is in the future, it will appear in the Upcoming timeframe.
End Date	*Required*. The date the event ends. If the current date is after the End Date, the event will appear on the Previous timeframe.

School	*Required.* If the Context Switcher is set to a specific school, that school will display in the **School** field and it cannot be changed. If **All Schools** is selected in the Context Switcher, the school must be selected from the **School** dropdown list.
Categories	*Required.* **Categories** are how similar products are grouped in the School Store. Categories assigned to the School selected appear on the dropdown list. Multiple Categories can be selected.
Cashier PIN	*Required.* The **Cashier PIN** is a six-digit number attached to the Categories previously selected. When a person enters the Cashier PIN on the Mobile Payments app, that person accesses the event and can enter purchases on the device they're using. • Cashier PINs must be unique across the district. • Only one PIN is allowed for each row of Categories. • A PIN is auto-generated but can be replaced with a unique number. • The same PIN can be given to multiple cashiers during the event, or a different PIN can be created for each cashier.
Clear/Remove	Click **Clear** or **Remove** to delete a Category and its Cashier PIN. • The **Clear** button displays if there is one line with Categories and a Cashier PIN. • The **Remove** button displays if additional lines are added.
Add	Click **Add** to assign different categories to different cashier PINs. Categories selected in a previous row can be used again **IF** a different Cashier PIN will be assigned.

Step 2 - Event Layout

The second step to creating an Event is entering the items to be sold and building the layout in which the items are to be displayed in the Campus Mobile Payments app.

The Item Selection & Layout section lists the Category. Below the selected Category are the related Products/Items that can be sold. If an item will be sold, the checkbox is marked and a Sequence number is assigned. This number determines the way the item is displayed in the Preview section. The Preview shows how the items will appear on the device used during the event.

Categories, **Products**, and **Product Items** must be set up first before completing this step.

Field Descriptions

Item Selection & Layout Fields	Description
Category	The options appearing on the **Category** dropdown list are based on the Categories selected in Step 1: Create Event.
Show Invalid	If you set the **Show Invalid** toggle to **ON**, inactive Products and Items that were active/valid at the time the event was set up also display. Otherwise, when the toggle is set to **OFF**, only active Products and Items display. Categories with invalid or inactive Products or Items will appear with a 🛑 . If a Category with invalid or inactive Products or Items is selected, they will not display in the Campus Mobile app. Users will need to go to General Product to reactivate the product(s) in order for them to display.
Product/Item Name	The bold-faced name under **Product/Item Name** is the Product. The Product Items appear below the Product. They are indented and in alphabetical order. The Product and Product Items displayed are based on the Category selected.

Sequence	Products and Product Items are listed in alphabetical order. A **Sequence** number can be entered to change the order in which the Products and Product Items will be displayed in the Campus Mobile Payments app.
Preview Fields	**Description**
Products	The **Products** buttons that are previewed are based on the selections made on the left-hand side under Item Selection & Layout. The Sequence numbers determine the order of the Products buttons. The Products buttons can be moved by dragging them to their new location. The Sequence numbers get updated accordingly.
Items	The Sequence numbers also determine the order of item buttons within Campus Mobile Payments. The **Items** buttons can be moved by dragging them to their new location. The Sequence numbers get updated accordingly. If an Item is tracking inventory and there are 5 or less items remaining, or it is out of stock, a LOW INVENTORY or OUT OF STOCK will label appear.
Alerts	**Description**
Inactive	A Category, Product, or Item will display as Inactive if the Active checkbox is unchecked within its respective setup.
Invalid	A Category, Product, or Item will display as Invalid if the Mobile Payments checkbox has been unchecked within its respective setup men.
Labels	**Description**
Low Inventory	This alert will appear next to an item if there are 5 or fewer items still available for purchase.
Out of Stock	This alert will appear next to an item if there are none left for purchase.

Editing Events

If users have the rights, Events on the Previous, Current, or Upcoming timeframes can be edited regardless of the status.

Events should not be edited while they are in progress. Errors will occur if purchases have been made after Categories, Items, and Products have been removed. If editing has taken place during an Event, have the cashier log out of the Event and log back in for the changes to go into effect.

1. Select *School Store > Administration > Events*.
   Result
   The Events screen displays.
2. Select a **Timeframe**: **Previous**, **Current**, or **Upcoming**.
   Result
   Events with a status of **Draft** or **Completed** display when the **Previous** button is clicked.
   Events with a status of **Draft** or **Active** display when **Current** is clicked.
   Events with a status of **Draft** or **Ready** display when **Upcoming** is clicked.
3. Click the **Edit** button.
   Result
   The screen for Step 1 - Create Event displays.
4. Make changes to any of the fields on the screen or add more Categories.
   If **All Schools** appears in the Context Switcher, the School field can be modified.

   > Changing the Start Date and End Date to current or future dates overrides the original event upon saving. Purchases made during the original event are retained to ensure historical data is accurate.

5. Click the **Save & Next** button.
6. Make any changes to Step 2 - Event Layout.
7. Click the **Finish** button.

   > Depending on the Start Date and End Date, the edited event will appear when the **Current** or **Upcoming** buttons are selected in the **Timeframe**.

Deleting Events

If users have the rights, Events on the Previous or Upcoming timeframes can be deleted regardless of the status. Events with a Current timeframe can be deleted with a status of Draft.

> An event can be deleted if purchases and payments are attached to it. These transactions **ARE** retained for reporting purposes.

Previous and Upcoming Events

1. Select *School Store > Administration > Events*.
   Result
   The Events screen displays.
2. Select a **Timeframe**: **Previous** or **Upcoming**.
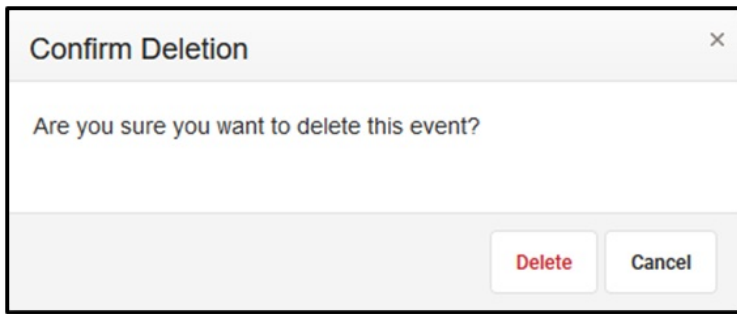   **Result**
   Events with a status of **Draft** or **Completed** display when the **Previous** button is clicked.
   Events with a status of **Draft** or **Ready** display when **Upcoming** is clicked.
3. Click the **Delete** button.
   Result

The **Confirm Deletion** message displays.

4. Click the **Delete** button to continue to permanently remove the event.
   Click the **Cancel** button to cancel the operation and keep the event.
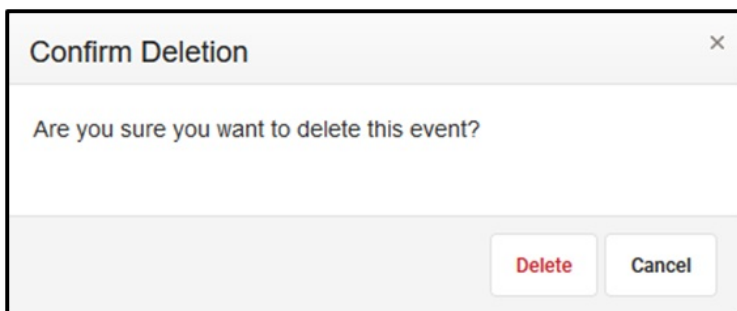
Current Events

Events on the Current timeframe can be deleted if the status is Draft. If the status is Active, it can be deleted, but it requires an extra step.

Events with a Draft Status

Events with a timeframe of Current AND a status of Draft can be deleted.

1. Select *School Store > Administration > Events.*
   Result
   The Events screen displays.
2. Click the **Current** button in the **Timeframe** button group.
   Result
   Events with a status of **Draft** or **Active** display.
3. Locate the event to be removed and click the **Delete** button.
   Result
   The **Confirm Deletion** message displays.

4. Click the **Delete** button to continue to permanently remove the event.
   Click the **Cancel** button to cancel the operation and keep the event.

Events with an Active Status

Events with a timeframe of Current AND a status of Active cannot be deleted, but they can be moved to the Upcoming timeframe by modifying the Start Date and End Date to a future date. It can then be deleted after it has been moved.

1. Select *School Store > Administration > Events*.
   Result
   The Events screen displays.
2. Click the **Current** button in the **Timeframe** button group.
   Result
   Events with a status of **Draft** or **Active** display.
3. Click the **Edit** button for the event to be modified.
   Result
   The side panel for the event displays.
4. Change the **Start Date** and **End Date** to a future date.
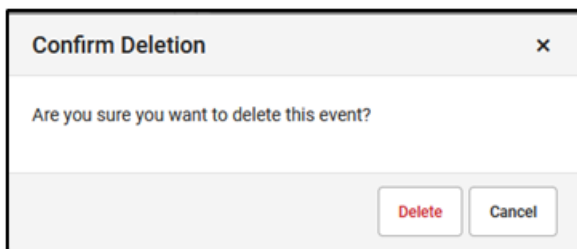5. Click the **Save & Next** button.
   Result
   The **Event Layout** screen displays.
6. Click the **Delete** button.
   Result
   The **Confirm Deletion** window displays.

7. Click the **Delete** button to remove the event or **Cancel** to keep it.