

Event Planning Checklist & System Logic

Use this guide to translate an event vision into technical settings. Complete **Part 1** and **Part 2** then pair with our system logic to ensure a seamless build in RepSpark.

Step 1 - Client Discovery

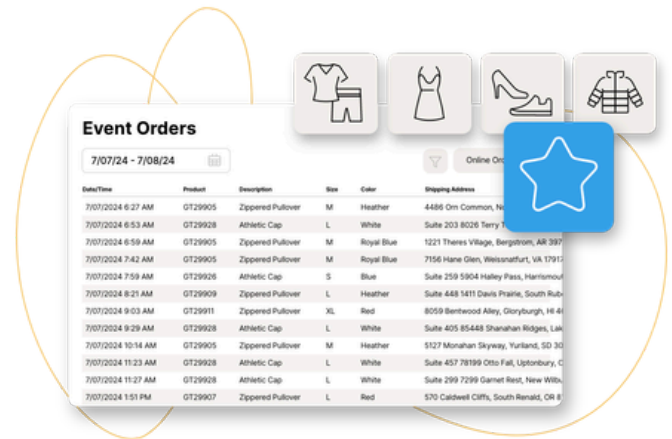
Gather these requirements to define the shopper's experience and logistics for the event.

- ✓ **Access: Who is allowed to shop?**
 - Public: Anyone with the link (Best for general pop-ups).
 - Private: Restricted to a specific roster (Best for VIP/Member events).
 - Requirement: If private, secure a CSV Roster (First Name, Last Name, Email).
- ✓ **Checkout: How are they paying?**
 - Gifted: The host pays via Points or Units.
 - Self-Pay: The guest pays via Credit Card or Member Account.
 - Requirement: Define the point value (e.g., 1 Point = \$100) or Member ID billing rules.
- ✓ **Shipping: Where is the gear going?**
 - Bulk: One consolidated shipment to the Club/Office for event pickup.
 - Drop Ship: Individual shipments sent directly to the guests' homes.
 - Requirement: Set the "Orders Due By" date and any Flat Rate shipping fees.
- ✓ **Visuals: What should the site look like?**
 - Assets: Secure the Event Logo, Desktop Banner (1920x600), and Mobile Banner (400x600).
 - Messaging: Draft a "Welcome" note and "Order Confirmed" instructions.
- ✓ **Logo Technicals:**
 - Do you have your event or club logo digitized embroidery files (DST or EXP)?

Step 2 - Internal Operations

Verify these backend settings to ensure the order flow is supported by the warehouse.

- ✓ **Assortment:** Is the Assortment created in RepSpark for this event?
- ✓ **Inventory Source:** Should this site pull from Live Stock or a Reserved Pool?
- ✓ **Fulfillment Rules:** Do we need to Enable Split Order (e.g., separating embroidered items from non-embroidered)?
- ✓ **Workflow:** Does a rep need to Manually approve orders, or should they flow Auto?



Step 3 - The System Logic (Build it in RepSpark)

IF the Event Goal is...	THEN set these Rules...
A Private/Gated Site	Disable User Validation: OFF + Upload Roster in Users Tab
An Open/Public Site	Disable User Validation: ON + Set Order Submission Code
A Gifting Program	Checkout Mode: Points or Units
Individual Home Delivery	Payment: Credit Card + Drop Ship: Required/Optional
Bulk Delivery to Venue	Payment: Account + Drop Ship: OFF + Submission: Manual
Required Embroidery	Configure Logo: Enabled + Logo Requirement: Enforced
Golf Genius Sync	Golf Genius ID: Enter ID in the Setup tab