Events Guide

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Events: The Big Picture

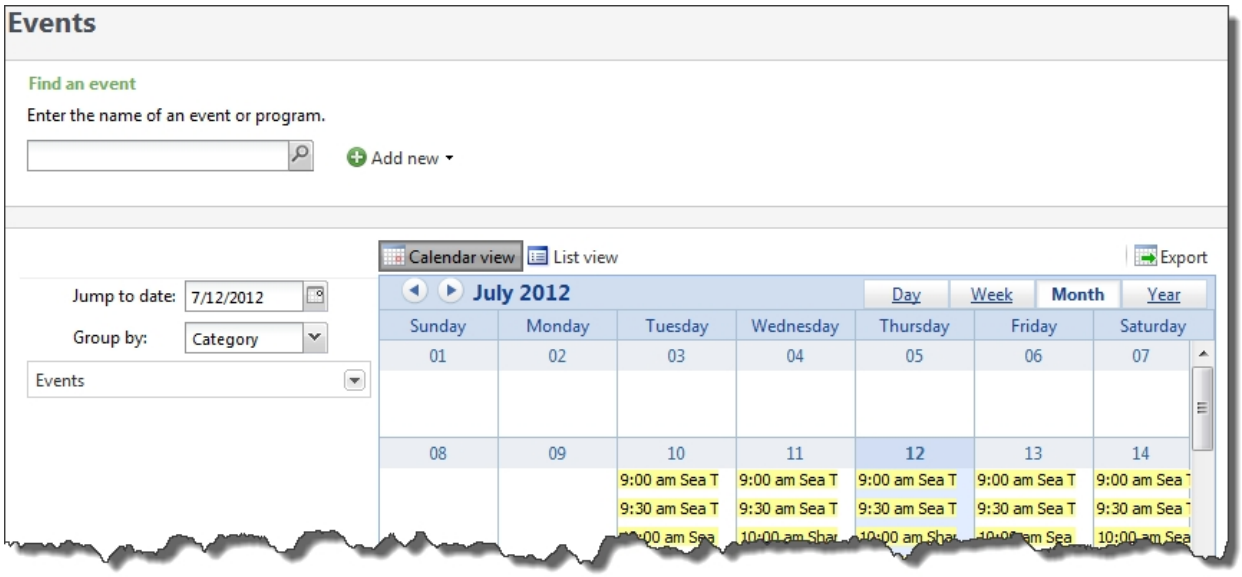
Full Circle View 9

With *Events*, you can manage events that your organization holds. You can set up one-time events, such as galas, or multi-level events, such as a class reunion with both a welcome lunch and formal evening dinner.

In this guide, you learn how to configure event settings and set up single and multi-level events. You can also learn to manage registrants and guests as well as configure event seating and invitations. This guide also covers how to view information about your events with event reports.

Full Circle View

From *Events*, you can configure your organization's event options and settings, add and manage one-time and multi-level events, set up event seating, create invitations, and run event reports. The Events page also provides a centralized location for you to search for events.



Event Configuration

Before you manage events, you can set up configuration options. Event configuration includes creating event locations, types and restrictions, and templates to help manage events.

You can create event and lodging locations on the Locations page. The Event locations tab includes the name of the location, the phone number, and the address as well as any room names and capacities for the location. On the Lodging locations tab, you view information about the location where registrants stay when they attend your events.

You must define registration types for your organization's events on the Registration types page. An event registration is a way to group registrants. For example, you may create a registration type of "Member/Single" with a registrant count of one.

To add personal restrictions or preferences to constituents for events, you can set up restriction types on the Restriction types page. For example, you can create a Dietary event restriction type to track registrants with a peanut allergy.

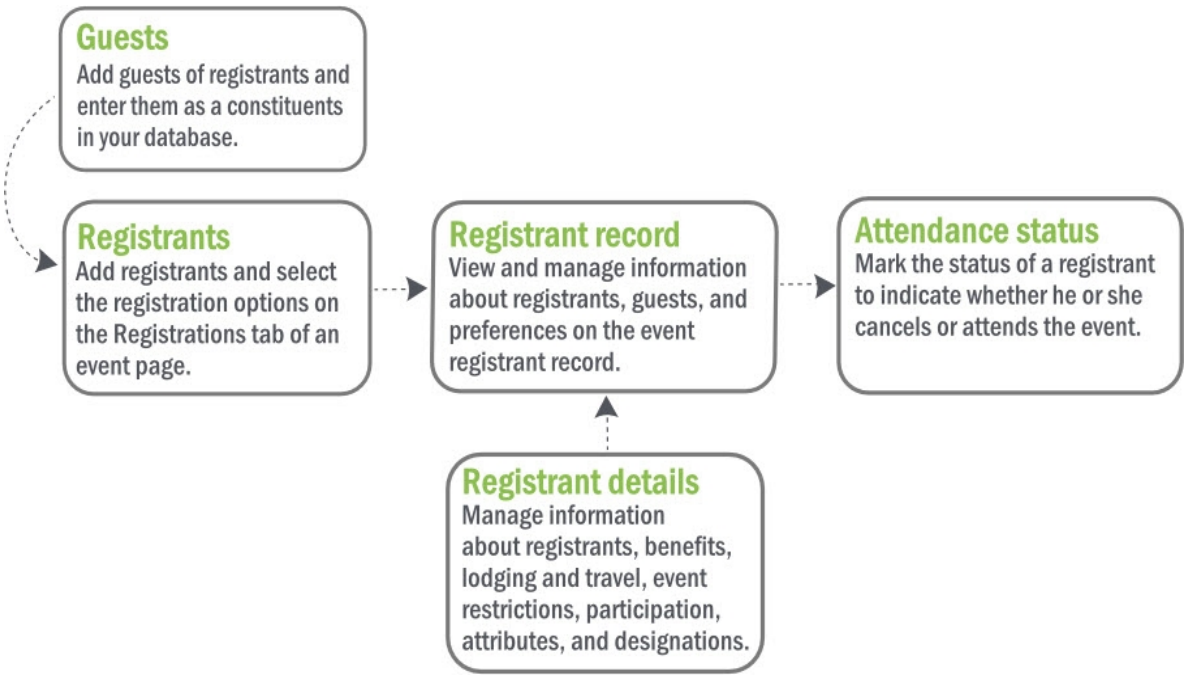
You can also create event management templates for multi-level events on the Event management templates page. Templates determine whether events at different levels can have registrants, speakers, lodging options and more. For example, a class reunion may require lodging options, but the reunion's lower-level events, such as a Farewell Dance, does not require lodging. For more information, refer to Events Configuration on page 13.

Event Setup

After you configure event options, you can record and track event detail information. You can add and manage events, coordinators, tasks, expenses, registration options and packages, invitations, registrants and seating from an event record. For more information, refer toEvent Setup on page 23.

Event Registration

From the Registrations tab on the Events page, you can add and manage registrants and registrations for each event. On the event page, this tab allows you to view registrants and their guests along with information about attendance statuses and registration fees.



On the registrant record, you manage registrant details, including guest, registration, and preference information. When your event has many registrants, you can filter your registrant list by registrant, registrant status, attendance, or registrant type. For more information, refer to Event Registration on page 83.

Event Seating

Before you can assign registrants and groups of registrants to seats, you must first configure the seating layouts for events. You can set up and name sections, tables, seats, and rows. You can also assign a registrant to a seat individually or you can assign groups to a section of seats. Finally, you can generate a seating summary to verify the arrangement. For more information, refer to Event Seating on page 108.

Event Invitations

After you create your event, you can manage the invitations. On the Invitee list page, you create and manage event invitations, add and manage invitees, and establish invitation processes for the invitations you create. For example, you can create a process for an invitation to an annual fundraiser and save the settings you select. Each time you need to send invitations to the fundraiser, you can run the process.

On this page, you also create and manage invitations, add and manage invitees, and manage registration and attendance status. For more information, refer to Event Invitations on page 125.

Event Reports

You can run event reports to monitor event progress. For a comprehensive overview of your event, you

can view the Event Profile report that contains information about the event's coordinators, location, seating, expenses and more.

View the Event Summary report for information about the event that includes the amount of invitees as their registration and attendance information and event income and expense information. Compare the effectiveness of two different events with the Event Comparison report. In addition, you can view information about revenue, team fundraising, and seating using other reports. For more information, refer to Event Reports on page 149.

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Before you manage event information, we recommend you set up configuration options. From *Events*, you can view these options.

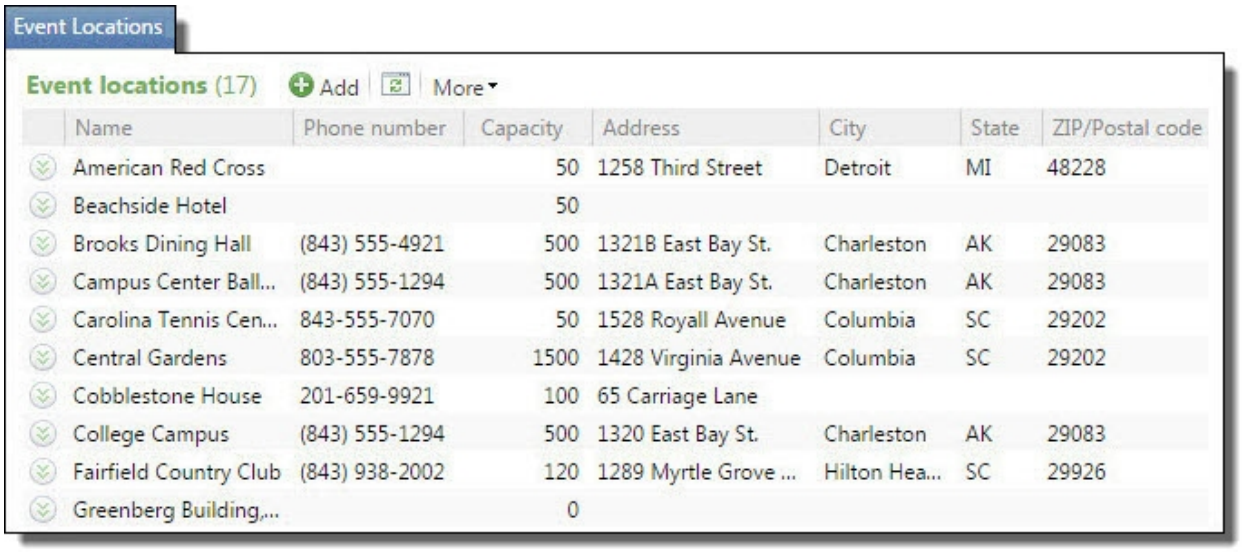
You use configuration options to set up *Events* for your users. These options affect multiple areas in the program. For example, you must create event locations to allow users to properly add events and select the location where the event occurs.

Event and Lodging Locations

When you add an event, you must select the location where the event occurs, such as a banquet hall or sports facility. You may also have registrants who travel to your event and require lodging facilities such as hotels. From *Events*, you can manage the venues where you hold events and the lodging facilities where registrants stay. Under **Configuration**, click **Locations**. The Locations page appears. It includes multiple tabs to manage your event locations and lodging.

Event Locations

On the Event Locations tab, you can view the venues where your organization holds events. For each location, you can view the name, phone number, capacity, and address.



Name	Phone number	Capacity	Address	City	State	ZIP/Postal code
American Red Cross		50	1258 Third Street	Detroit	MI	48228
Beachside Hotel		50				
Brooks Dining Hall	(843) 555-4921	500	1321B East Bay St.	Charleston	AK	29083
Campus Center Ball...	(843) 555-1294	500	1321A East Bay St.	Charleston	AK	29083
Carolina Tennis Cen...	843-555-7070	50	1528 Royall Avenue	Columbia	SC	29202
Central Gardens	803-555-7878	1500	1428 Virginia Avenue	Columbia	SC	29202
Cobblestone House	201-659-9921	100	65 Carriage Lane			
College Campus	(843) 555-1294	500	1320 East Bay St.	Charleston	AK	29083
Fairfield Country Club	(843) 938-2002	120	1289 Myrtle Grove ...	Hilton Hea...	SC	29926
Greenberg Building,...		0				

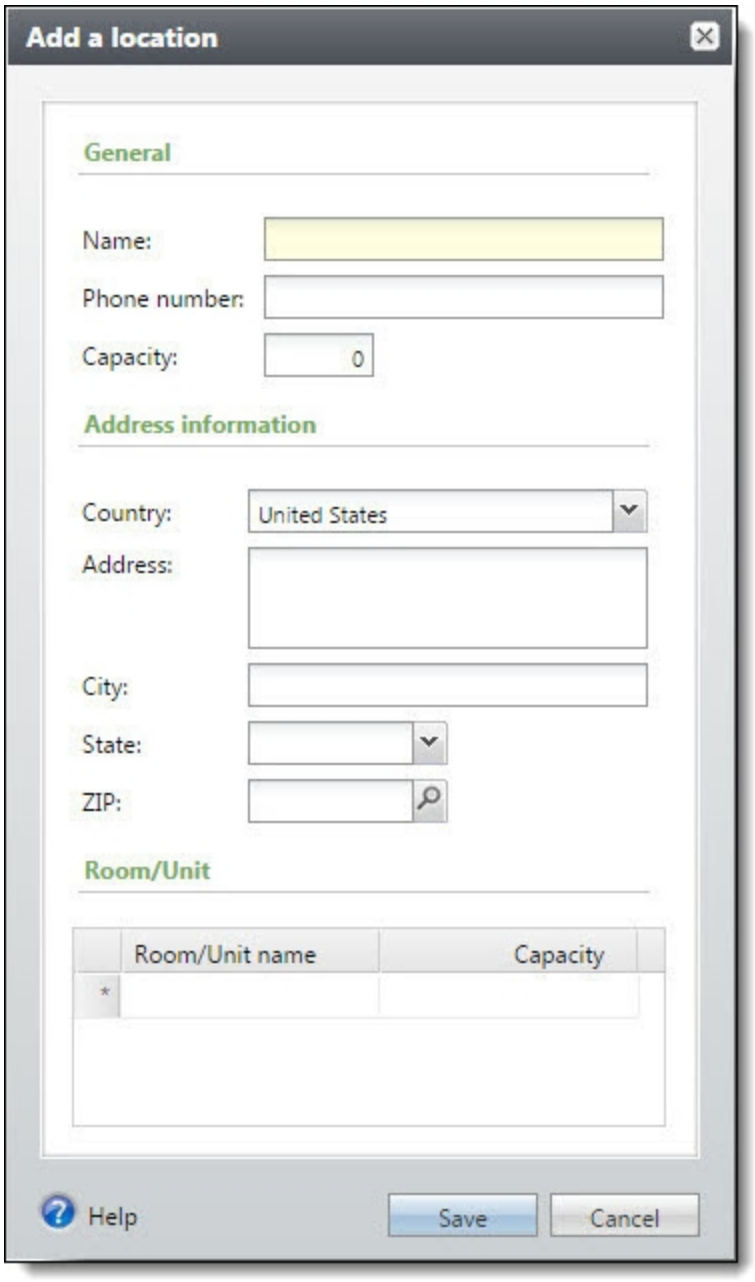
From the grid, you can add and manage event locations.

Add Event Locations

When you host an event, you must select a venue where the event occurs, such as a banquet hall or sports facility. When you add an event location, you can enter information about its address, contact, and capacity. After you add a location, it appears in search results when users select locations for events.

Add an event location

1. From *Events*, click **Locations** under **Configuration**. The Locations page appears.
2. On the Event Locations tab, click **Add**. The Add a location screen appears.



3. Under **General**, enter the name and phone number of the location. If the location is in a larger facility with multiple areas, specify the location.
4. In the **Capacity** field, enter the number of people the location accommodates. The capacity for the location does not affect the capacity for an event at the location.
5. Under **Address information**, enter the address for the location.
6. Under **Room/Unit**, you can enter or edit room names and capacities for the location. For example, a convention center may have 20 meeting rooms.
7. Click **Save**. You return to the Locations page.

Rooms for Event Locations

Larger event venues may have rooms or other distinct units within them. For example, a convention center may have 20 meeting rooms, and a hotel may have a restaurant, atrium, and rooftop lounge. You can add rooms when you create or edit locations. You can also add rooms to locations when you create an event.

Add or edit a room from an event location

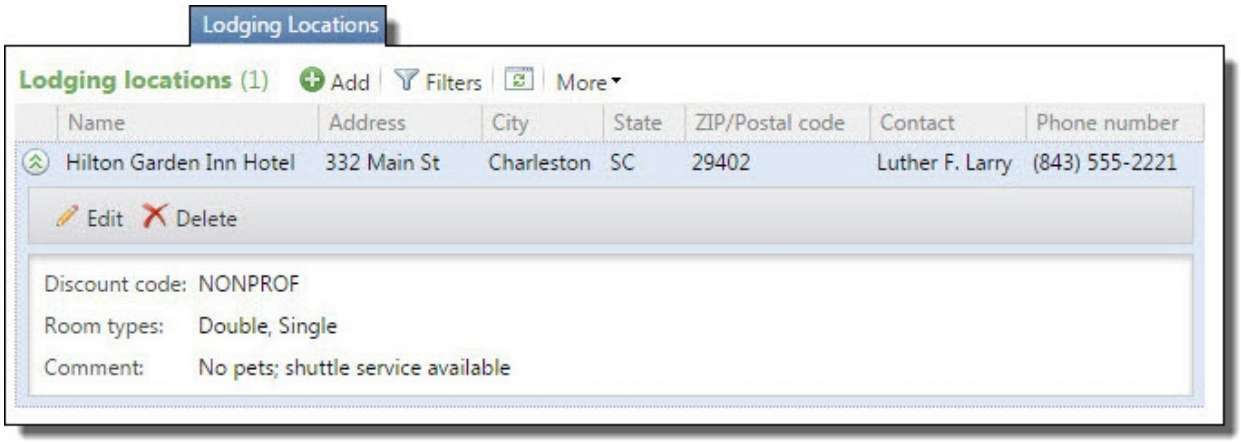
1. From *Events*, click **Locations** under **Configuration**. The Locations page appears.
2. On the Event Locations tab, select the location and click **Edit**. The Edit location screen appears.
3. Under **Room/Unit**, you can enter or edit room names and room capacity information.
4. Click **Save**. You return to the Locations page.

Add a room to an event

1. From *Events*, click **Add an event**. The Add an event screen appears.
2. Under **Location information**, you can select the location of the event.
3. In the **Room** field, you can select the room at the location specified. You can also click **Add** to add a new room to the location.
4. After you enter information for the event, click **Save** and open the event page.

Lodging Locations

On the Lodging Locations tab, you can view the facilities where your registrants stay when they travel to events. For each location, you can view the name, phone number, address, and contact. You can also view any comments about the lodging location.



To filter the lodging locations in the grid, click **Filter**, enter the name or city, and click **Apply**. To remove the filter and display all locations, click **Reset**.

To view detailed information about a lodging location, select it in the grid and click **Show Details**. The **Details** window displays the discount code, room types, and comments about the location.

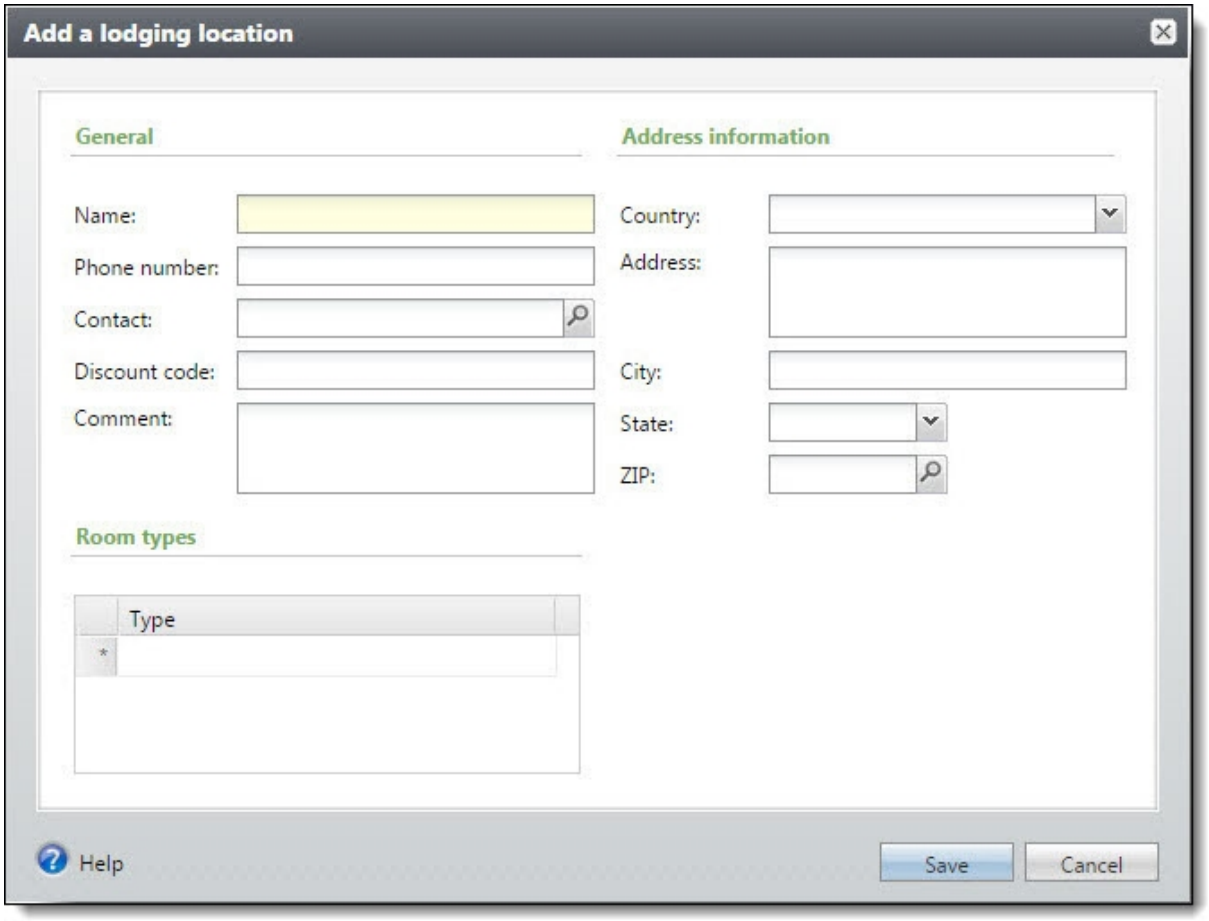
From the grid, you can add and manage lodging locations.

Add Lodging Locations

You may have registrants who travel to your event and require lodging facilities such as hotels or motels. Your organization may also provide on-site lodging accommodations for registrants and guests. When you add a lodging location, you can enter its address and contact information.

Add a lodging location

1. From *Events*, click **Locations** under **Configuration**. The Locations page appears.
2. On the Lodging Locations tab, click **Add**. The Add a lodging location screen appears.

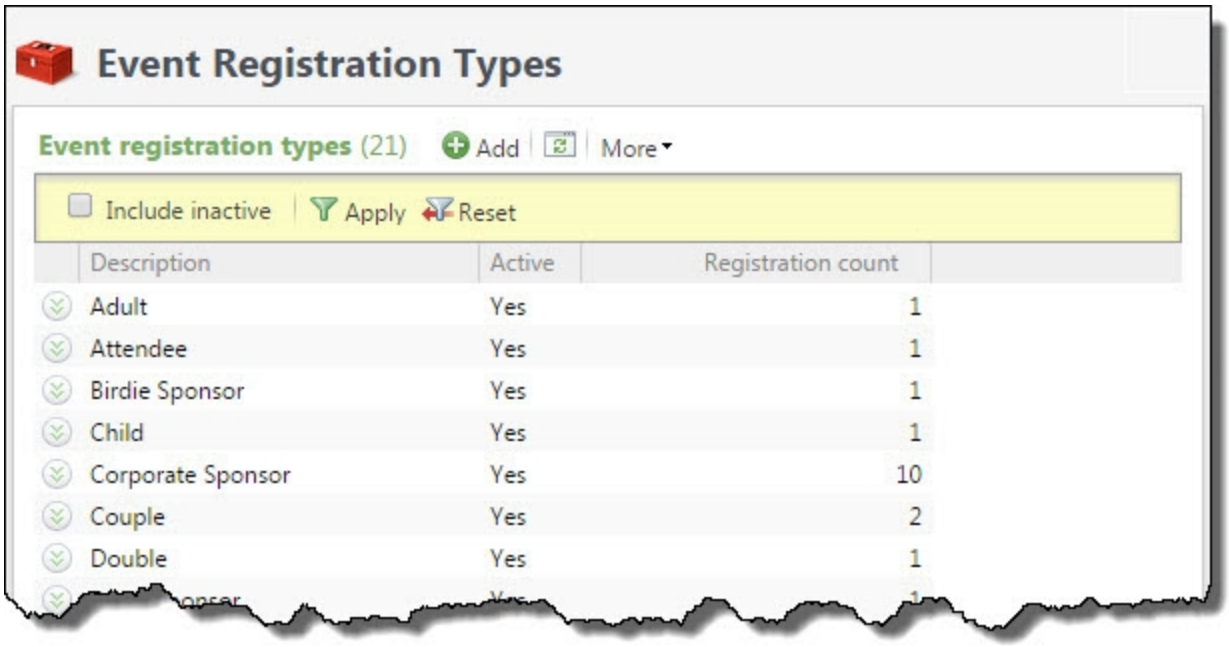


3. Enter the name and phone number for the lodging location. If it is part of a franchise with other locations in your area, specify the location.
4. In the **Contact** field, search for and select the constituent who acts as a contact at the location.

5. If your organization negotiates a discounted rate for your event attendees, in the **Discount code** field, enter the corporate code or phrase registrants must mention to receive the discount.
6. In the **Comment** field, enter information about the location such as whether it allows pets.
7. Under **Address information**, enter the address.
8. Under **Room types**, select the types of available rooms, such as smoking, nonsmoking, and bed size. Your system administrator configures the available room type options.
9. Click **Save**. You return to the Locations page.

Registration Types

An event registration type is a category of registration options. When you define registration options for an event, you select a registration type for each option to indicate the number of associated registrations and the registrants' level of participation in the event. For example, you may create a registration type of "Member/Single" with a registration count of one. You may have another registration type of "Member/Family" with a registration count of four. To manage the registration types from *Events*, click **Registration types** under **Fundraising events**. The Event Registration Types page appears.



Under **Event registration types**, the registration types appear. For each registration type, you can view its description, status, and registration count. To view inactive registration types in the grid, select **Include inactive** and click **Apply**.

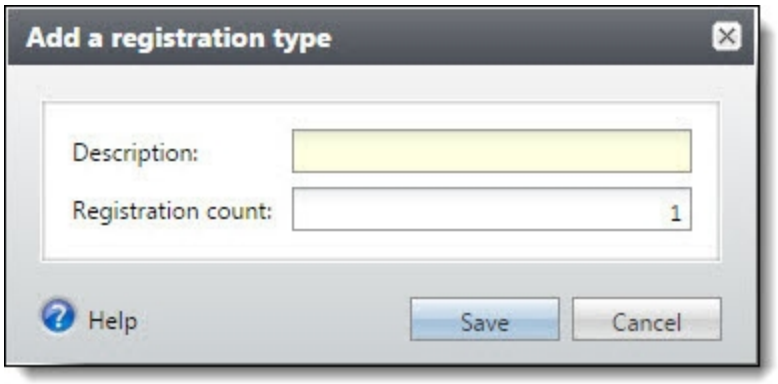
From the grid, you can add and manage registration types.

Add Registration Types

To create categories of registration options for events, you must define registration types and enter a registration count for each registration type. Registration types are ways to group registration options. On the Event registration types page, you can add a registration type, create a unique name for that registration type, define a registration count, and make the registration type active. When you add a registration option for an event, you select a registration type with which to associate the option.

Add a registration type

1. From *Events*, click **Registration types** under **Configuration**. The Event Registration Types page appears.
2. Under **Event registration types**, click **Add**. The Add a registration type screen appears.



3. Enter a unique description to identify the registration type.
4. In the **Registration count** field, enter the number of registrations to associate with the registration type. For example, if a registration type of Golf Foursome should include four registrations, enter 4.

Note: When you set up registration options for an event, the registration count appears as the default. However, you can edit the count. For example, registration counts may vary, depending on the size of the event.

5. Click **Save**. You return to the Event Registration Types page.

Event Restriction Types

When you register constituents for events, you can add restriction types to track personal restrictions or preferences such as dietary or physical needs.

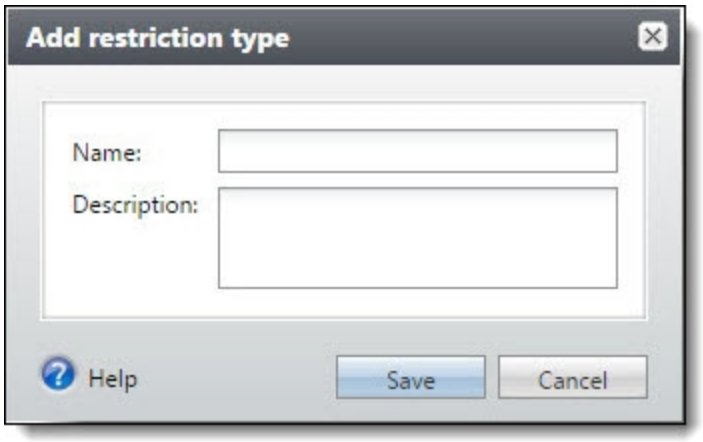
After you create event restriction types, you must add restriction options to them. For example, for a Dietary event restriction type, you can add options such as Allergic to nuts, Vegetarian, or Kosher only so registrants receive the proper food.

Add Event Restriction Types

You can add event restriction types to track important registrant information such as dietary or physical restrictions.

Add event restriction types

1. From *Events*, click **Restriction types.** The Event Restriction Types page appears.
2. Click **Add**. The Add restriction type screen appears.



3. Enter a unique name and description to identify the event restriction.
4. Click **Save**. You return to the Event Restriction Types page.

Event Management Templates

Some events are tiered and have multiple tiers or levels. You can set up templates for the multi-level events. The templates determine whether events at levels or tiers can have registrants, speakers, lodging options, and more. For example, you may have local events that "roll up" to a larger, national event. The national event, however, may not take registrations directly, so attendees would need to register at the local level. You can override the event property settings from the individual event.

Note: The event name appears at the top of the record and is followed by the name of the level from the template. For example, if "2011 Conference Keynote" is the name of the event and "Conference Sessions" is the name of the level from the multi-level event template, the record will display "2011 Conference Keynote - Conference Sessions."

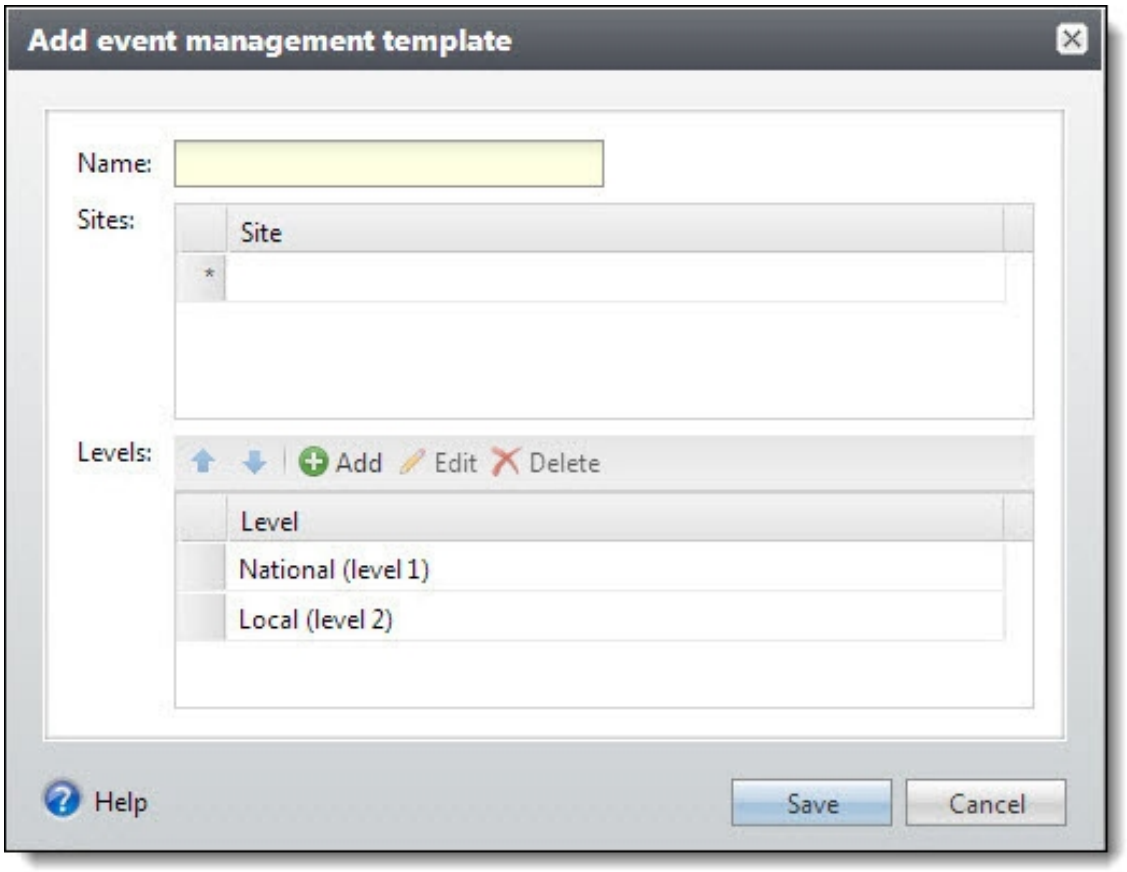
Add Event Management Templates

You can add templates to use when you create multi-level events. The templates determine whether events at levels or tiers can have registrants, speakers, lodging options, and more. For example, you may have local events that "roll up" to a larger, national event. The national event, however, may not

take registrations directly, so attendees would need to register at the local level. You can override the event property settings from the individual event.

Add event management template

1. From *Events*, click **Event management templates.** The Event Management Template page appears.
2. Click **Add**. The Add a event management template screen appears.



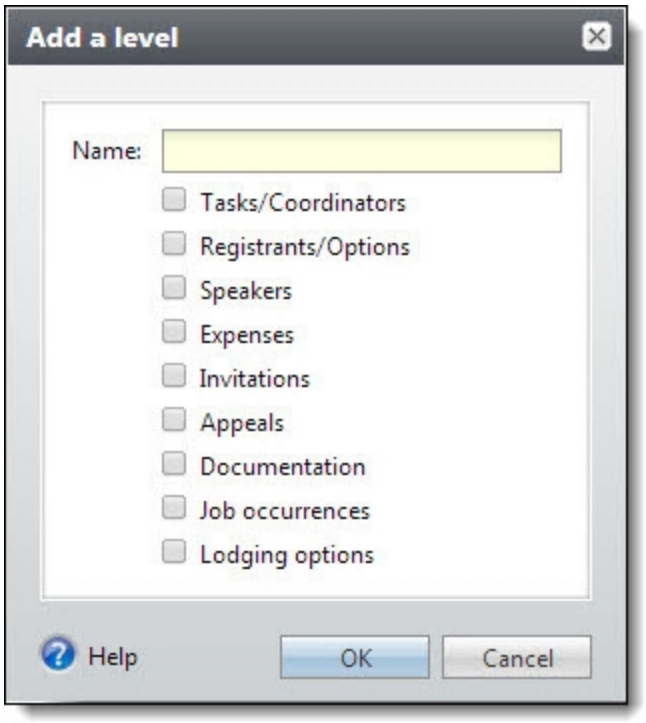
3. Enter a name for the template.
4. You can associate the template with sites to restrict the use of the template.
5. Add levels to the template for each level or tier of events. To add or edit levels, refer to Add or Edit Event Levels on page 21. To re-order the event levels, use the arrow buttons.
6. Click **Save**. You return to the Multi-level Event Templates page.

Add or Edit Event Levels

When you add event management templates, you can specify the levels or tiers of events. For each tier, you can specify whether events at levels or tiers can have registrants, speakers, lodging options, and more. You can override the event option settings from the individual event.

Add or edit event levels

1. From *Events*, click **Event management templates.** The Event Management Template page appears.
2. Click **Add** or select a template and click **Edit**. The event management template screen appears.
3. Under **Levels**, click **Add** or select a level and click **Edit**. The event level screen appears.



4. Enter a name for the level or tier of events. You can select the options for events at this level, such as whether the events have registrants, speakers, lodging options, and more. These are the default options for events at this level. However, you can override these options for a single event. For more information, refer to Edit Event Management Options on page 41.
5. Click **Save**. You return to the event template. To re-order the event levels, use the arrow buttons.

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With *Events*, you can manage your organization's events. Whether you are arranging a tennis tournament, an awards banquet, a trustee luncheon, a holiday party, or homecoming activities, you can record and track the information in *Events*.

Event Setup Checklist

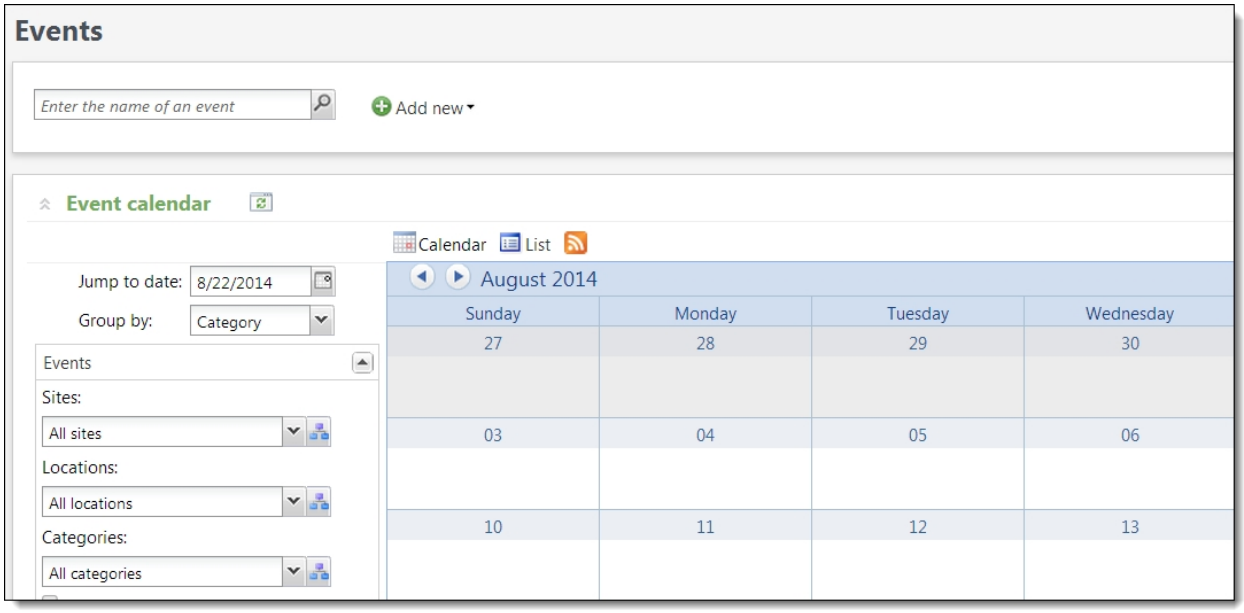
Setting up events requires several steps.

- ☐ Add event locations. For more information, refer to Add an event location on page 14.
- ☐ Add lodging locations. For more information, refer to Add Lodging Locations on page 17.
- ☐ Add registration types. For more information, refer to Add Registration Types on page 19.
- ☐ Add an event. For more information, refer to Add Events on page 28.

- Add supporting events if the event is comprised of multiple events grouped together. For more information, refer to Add an Event to the Hierarchy on page 76.
- Add event coordinators. For more information, refer to Add Event Coordinators on page 43.
- Add event tasks. For more information, refer toAdd Event Tasks on page 44.
- Add event expenses. For more information, refer to Add Expenses on page 52.
- Add registration options. For more information, refer to Add Registration Options on page 56.
- Add registration packages if the event is comprised of multiple events grouped together. For more information, refer to Add Registration Packages on page 59.
- Add an invitee list and add invitation processes. For more information, refer to Event Invitations on page 125.
- Add registrants and preference information. For more information, refer to Registrants and Guests on page 85.
- Add event seating. For more information, refer to Configure Seating Layouts on page 109.

Events Page

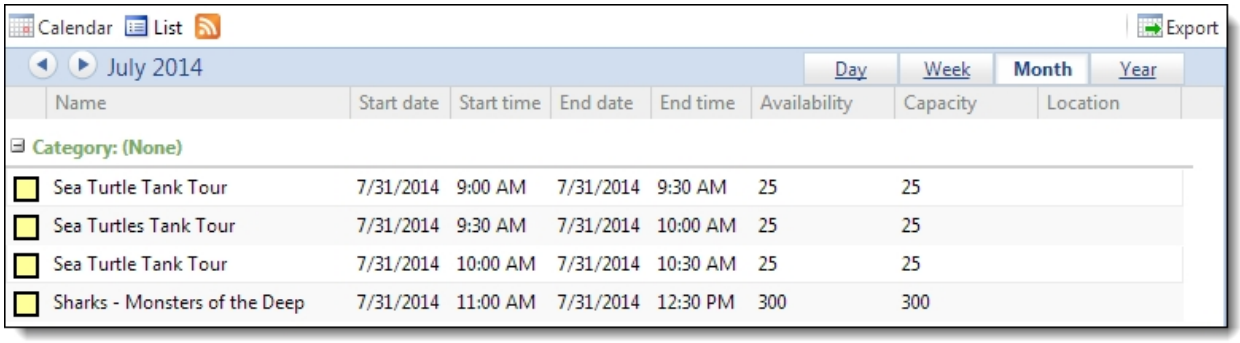
This centralized events page provides a search field for all event types, along with calendar and list views of your events. It enables you to add events and programs, search for events, and report on them. You can also edit and delete event information from this page. Click *Events* to view this page.



Choose Category or Location in the **Group by** box to look at event times and dates to filter events. Ffilters enable you to view only the event category and location attributes that interest your organization. Use the checkboxes to determine what is displayed on the list. Event categories and locations are identified by color. You can collapse and expand the calendar.

You can use the calendar view to see event time and date information. To access the calendar view, click the down arrows beside **Event calendar**. View the events calendar by day, week, month or year. To edit or delete information for an event, right-click the event. When you select **Edit**, the Edit event screen appears, and you can edit details such as schedule and location information. Click **Go to event** to access the event record.

You can use the list view to view event time and date information, if you prefer to view event information in a list format rather than on a calendar. Each category of event is associated with a color that is shown at the left of the event name. To access the list view, click **List**. To edit or delete information for an event, right-click the event. When you click **Edit**, the Edit event screen appears. You can edit details such as schedule and location information. Click **Go to event** to access the event record.



Note: The list displays a maximum of 50 items per date. If there are more items, additional pages will open.

Add New Events

From the **Events** page, you can use the **Add New** feature to create types of events. **Add New** enables you to create events that cater to your organization's needs. Click the name of an event to open a screen to add that type of event.

Select an event type:

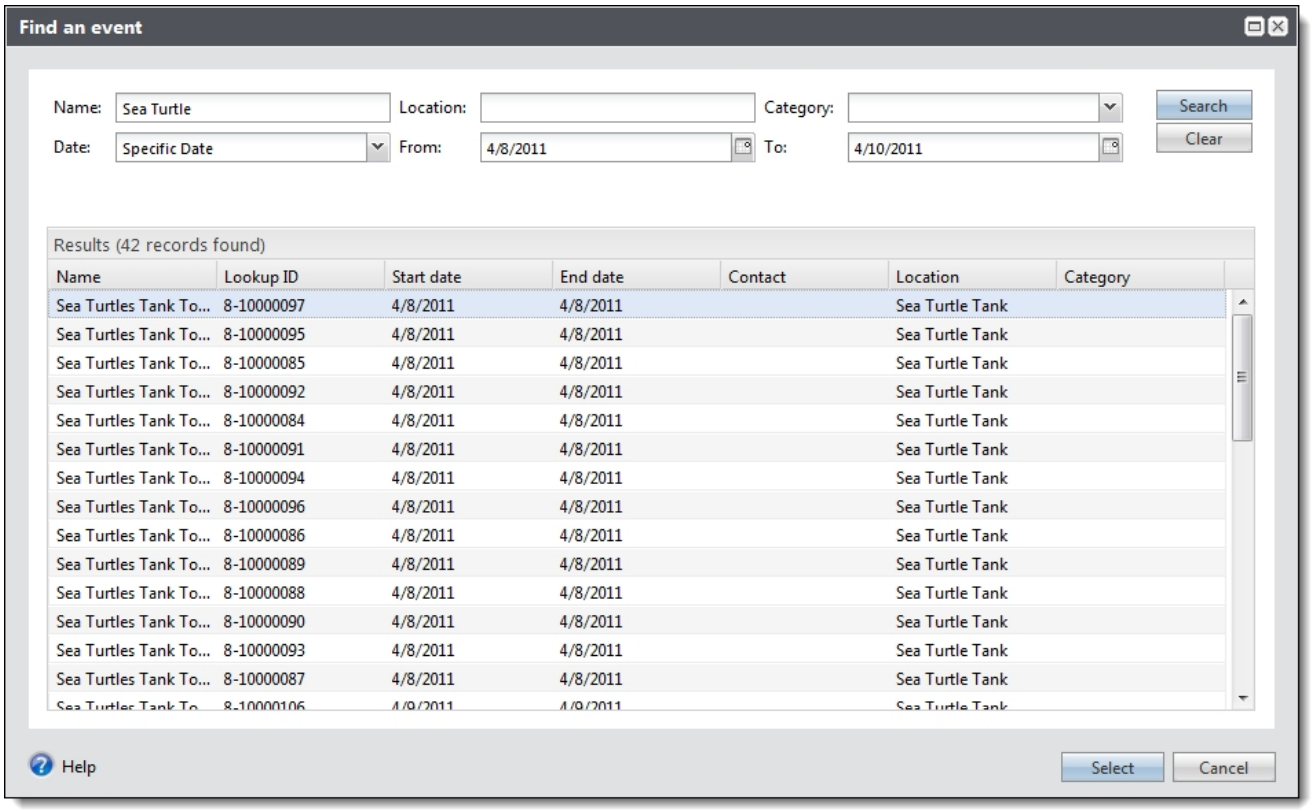
- **Scheduled program:** Set up scheduled programs to sell tickets for timed or recurring events. Examples include art classes, museum exhibits, and shows. Additionally, you can set up

scheduled programs for pre-registered events that require registration.

- **Daily admission program:** Set up daily admission programs for tickets that are sold all day at any time, such as museum or aquarium admissions.
- **Special event:** Set up special events for one-time events, such as galas.

Find an Event

From the Events page, you can search for events and programs. Enter the name of the event in the search field and then click the search button. The Find an event screen appears.



You can enter search criteria including the event's location, category, and dates.

Click **Search** to find events that meet your criteria. Those events appear in the search grid. When you select an event from the results, its record opens.

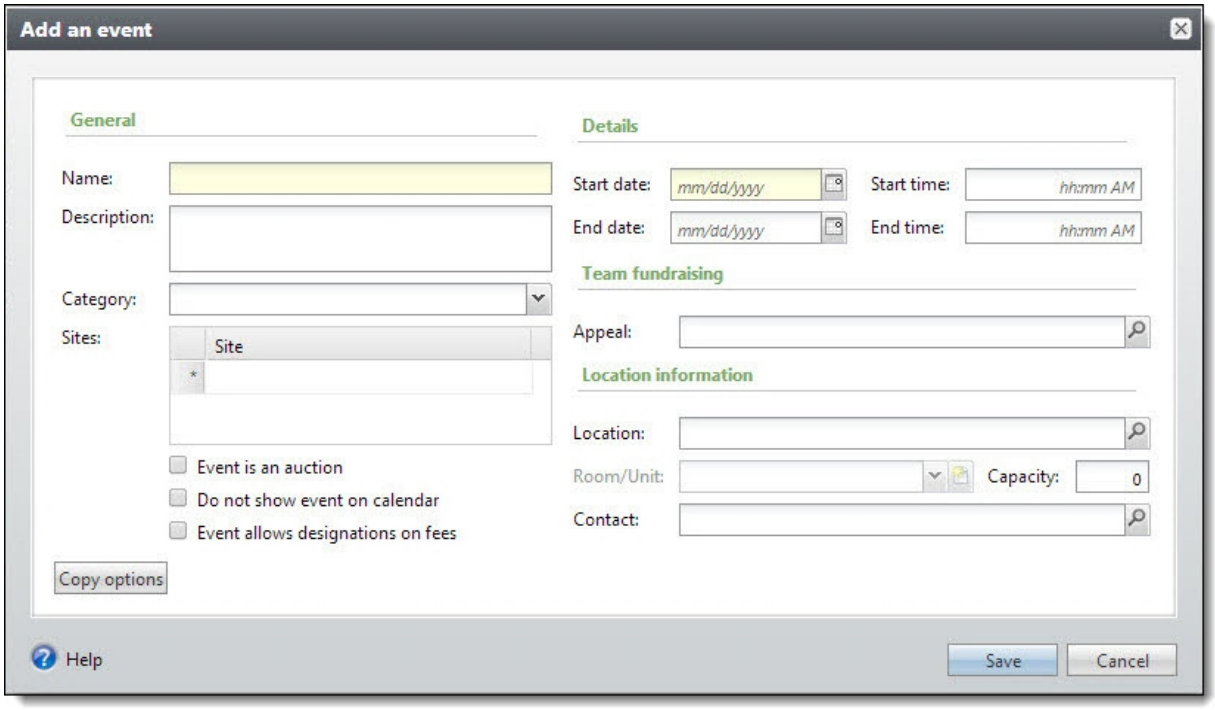
Add Events

When you add a new event to your database, you can enter a description of the event, start and end times and dates, capacity, and location information.

When you add an event as a supporting event for a larger event, you can specify the main event to which it belongs and associate the two.

Add an event

1. From *Events*, click **Add new** and select the event type. For information about the items on this screen, refer to Add an Event Screen on page 30



2. Under **General**, enter a unique name and description to identify the event.
3. To further define the event, in the **Category** field, select the type of event, such as Banquet or Sporting event. Your organization configures the categories that appear.
4. When you select **Do not show event on calendar**, the event will not be displayed on the event calendar view.
5. When you select **Event allows designations on fees**, you can apply fees to designations. You can select the designations on the Designations tab of the event record.

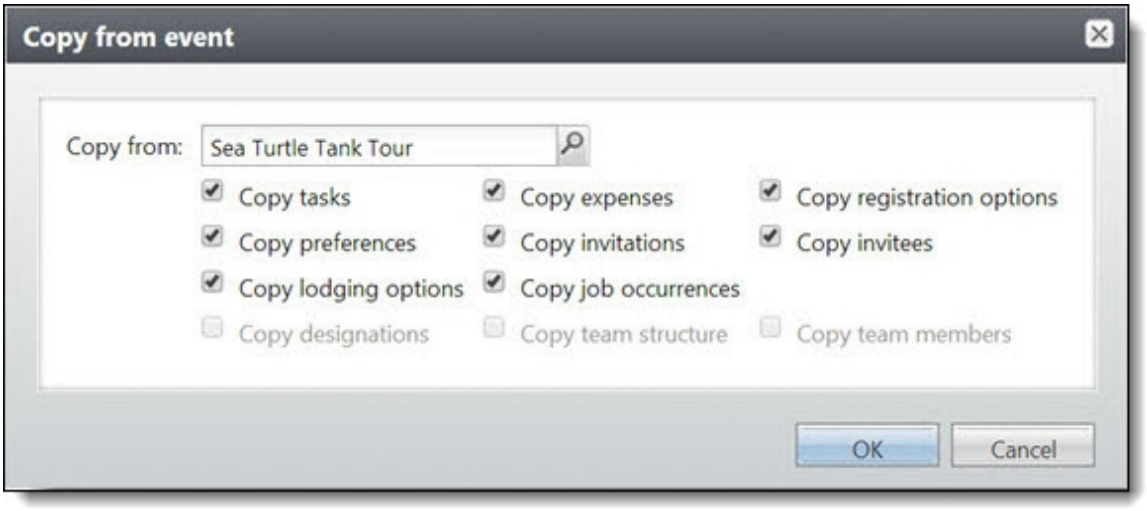
   Only the receipt amount applies to the designation. This does not include the cost of the registration or benefits associated with the event.
6. Under **Details**, enter the start and end date and times of the event.
7. Under **Location information**, search for and select the location where your organization hosts the event.
8. In the **Room/Unit** field, select the room or unit at the selected location used for the event. To add a new room to the location, click **Add**.
9. In the **Capacity** field, enter the total number of attendees the event can accommodate.

Tip: The program tracks the event capacity with the number of registrations received for the event. While the event capacity does not have to match the location capacity, we recommend you not exceed the location capacity.

10. In the **Contact** field, search for and select the individual constituent who serves as a contact for the event location.
11. If the event is similar to another event, such as to add an instance of an event you hold each year, copy the settings from the other event.

Note: When you add a multi-level event, the event options are determined by the event management template; the **Copy options** button will not appear.

a. Click **Copy options**. The Copy from event screen appears.



b. In the **Copy from** field, search for and select the event from which to copy settings.
c. Select the settings to copy from the original event such as tasks, expenses, and invitations.
d. Click **OK**. You return to the Add an event screen.

12. Click **Save**. The record of the new event appears.

Add an Event Screen

The table below explains the items on the Add an event screen. For information about how to access this screen, refer to Add Events on page 28.

Screen Item	Description
Name	Enter a name to identify the event.
Description	To further identify the event, enter a detailed description of the event.
Category	To define the event, select the category for the event such as Reception or Sporting event.

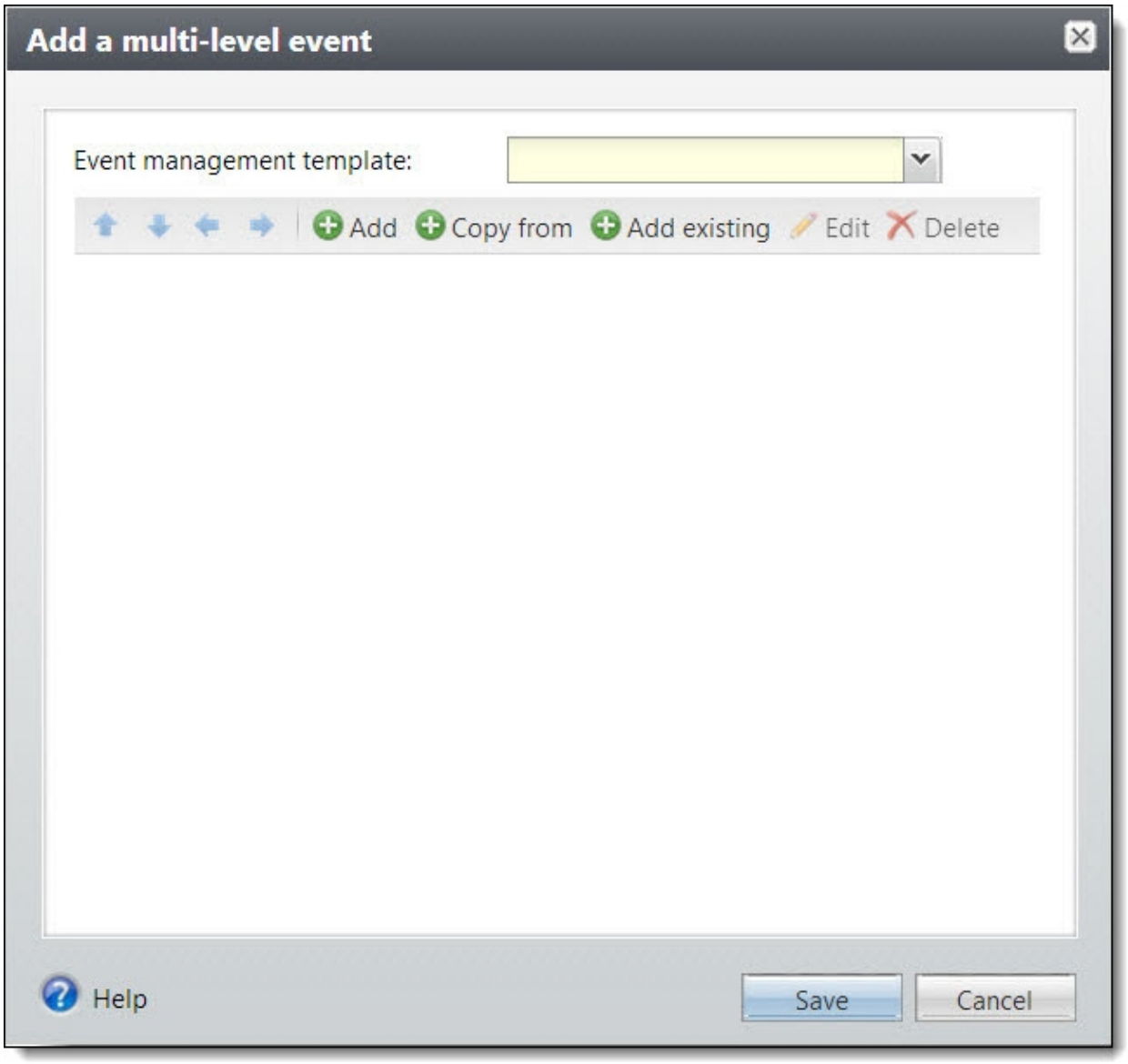
Screen Item	Description
Do not show event on calendar	When you select this checkbox, the event will not be displayed on the event calendar.
Event allows designations on fees	When you select this checkbox, the Designations tab appears on the new event record for you to select possible designations for the gift, including a default designation. The registration fee applied to the designation is equal to the receipt amount. This does not include the cost of the event or benefits. If you partially pay for an event registration, the revenue is applied to the cost and benefits of the event until that portion is fully paid. Only then is event registration revenue applied to the designations. You cannot edit this option after users register for the event.
Start time and **End time**	Enter the time the event begins and ends. Event times are not required.
Location	Search for and select the location where the event takes place.
Room/Unit	Select the room at the location of the event. To add a new room to the location, click **Add**.
Capacity	Enter the number of attendees the event can accommodate. This number does not have to be the same as the location capacity, but should not exceed location capacity. The program tracks this capacity with the number of registrations for the event.
Contact	Search for and select the individual constituent who serves as a contact for the event location.
Copy options	To copy the settings from a similar event in the database, click this button. On the Copy from event screen, search for and select the event from which to copy settings and select which options, such as tasks and registration options, to copy from the event. **Note:** If you are adding a multi-level event, the event options are determined by the event management template; the **Copy options** button will not appear.

Add Multi-level Events

If your organization hosts many multi-level or tiered events, you can set up multi-level event templates to streamline data entry. When you add a multi-level event, you can select the template to use and can add the events.

Add a multi-level event

1. From *Events*, click **Add new** and select Multi-level event. The Add a multi-level event screen appears. For information about the items on this screen, refer toAdd a Multi-level Event Screen on page 33.



2. Select the multi-level event template to use.
3. To add a supporting event, click **Add**. The Add an event screen appears. For more information about items on the screen, refer toAdd an Event Screen on page 30. You can also edit or delete supporting events.
4. As you add events, you can use the arrows to show the hierarchical levels or tiers of events and how the supporting events are related.
5. Click **Save**. The record of the new event appears.

Note: The event name appears at the top of the record and is followed by the name of the level from the template. For example, if "2011 Conference Keynote" is the name of the event and "Conference Sessions" is the name of the level from the multi-level event template, the record will display "2011 Conference Keynote - Conference Sessions."

Add a Multi-level Event Screen

Screen Item	Description
Multi-level event template	If your organization hosts many multi-level or tiered events, you can set up multi-level event templates to streamline data entry. When you add a multi-level event, you can select the template to use and can add the events.
Arrows	Use the arrows to show the hierarchical levels or tiers of events and how the supporting events are related.
Add, **Edit**, and **Delete**	After you select the multi-level event template, you can add supporting events. The templates determine whether events at levels or tiers can have registrants, speakers, lodging options, and more. **Note:** When you convert an individual event to a multi-level event, the individual event becomes the top tier event. For information about how to add or edit individual events, refer toAdd an Event Screen on page 30.

Add Existing Events to Multi-level Events

When you create multi-level events, you can include a single event you have already created. From the Add a multi-level event screen or from the event hierarchy, click **Add**, **Existing event**. Select the existing event and click **Save**. The event is part of the multi-level event and is displayed in the hierarchy.

Event Record

The event record displays tabs with information about tasks, registrants, expenses, prices, location information, coordinators, and notes for an event. You can add, edit, and delete information from these tabs.

Note: If this is a multi-level event, the event name appears at the top of the record and is followed by the name of the level from the template. For example, if "2011 Conference Keynote" is the name of the event and "Conference Sessions" is the name of the level from the multi-level event template, the record will display "2011 Conference Keynote - Conference Sessions."

You can mark events active or inactive under **Tasks** on the explorer bar. You can refresh the screen to make sure you have the latest information.

Event Expenses Thermometer

In the summary area of the event page, you can use the event expenses thermometer to view expense information. The expense thermometer compares the amount budgeted for expenses and the amount spent so far. The result appears as a percentage and as a visual representation on the thermometer.

Note: If this is a multi-level event, you can click **Include sub-events** to view event expenses and capacity information for the event and the sub-events. Click **Only this event** to switch the summary view back to the event only.

Event Capacity Thermometer

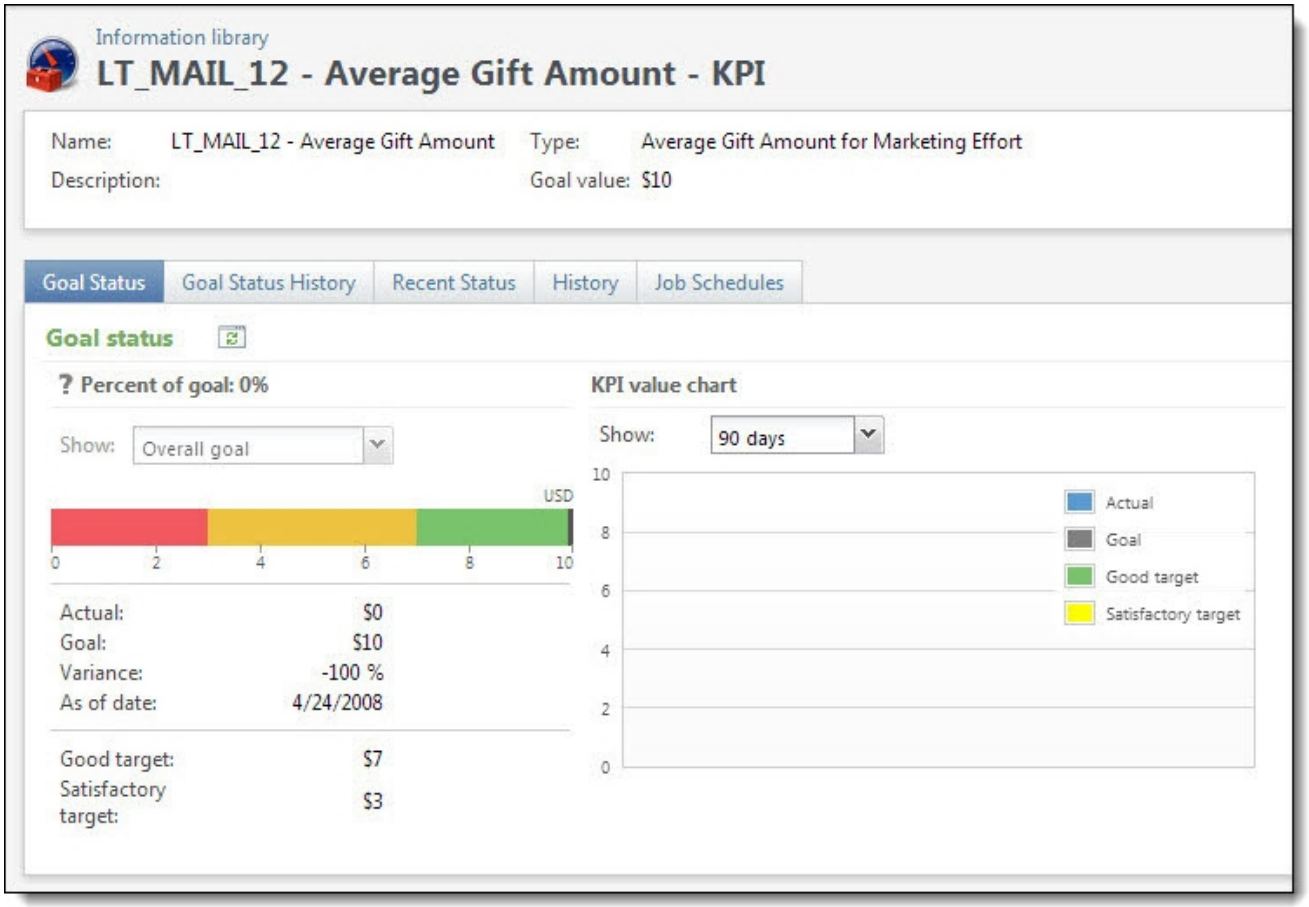
In the summary area of the event page, you can use the event capacity thermometer to view capacity information. The event capacity thermometer compares the event capacity and the number of registrants so far. The result appears as a percentage and as a visual representation on the thermometer.

Note: If this is a multi-level event, you can click **Include sub-events** to view event expenses and capacity information for the event and the sub-events. Click **Only this event** to switch the summary view back to the event only.

Event KPIs

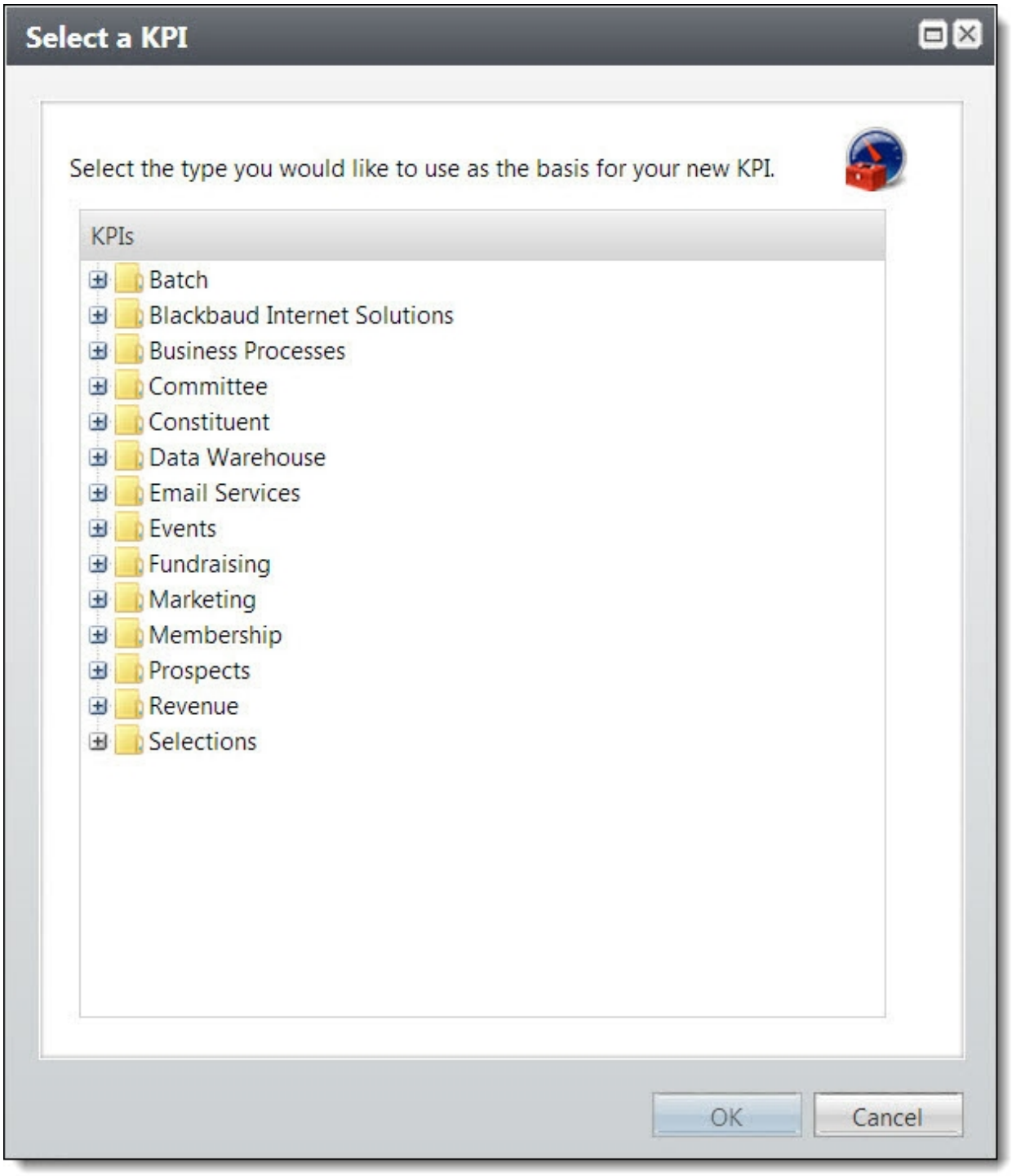
Key Performance Indicators (KPIs) enable you to check how certain aspects of your events perform. When you associate a KPI with a defined goal on an event, the KPI is displayed in the detail view on the KPI page for the event. For example, you can create a KPI instance that displays the "Event Registrant Capacity" on the KPI page when a particular event is selected. You can also create an "Event Revenue" KPI to monitor registration and donation revenue for the event.

Note: If this is a multi-level event, you can click **Include sub-events** on the Criteria tab to view information for the event and the sub-events.

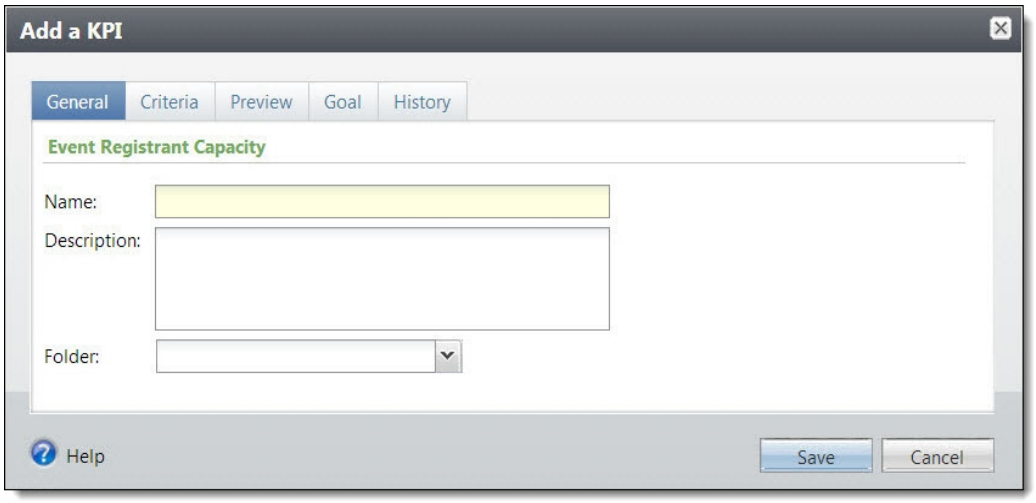


Add an event KPI instance

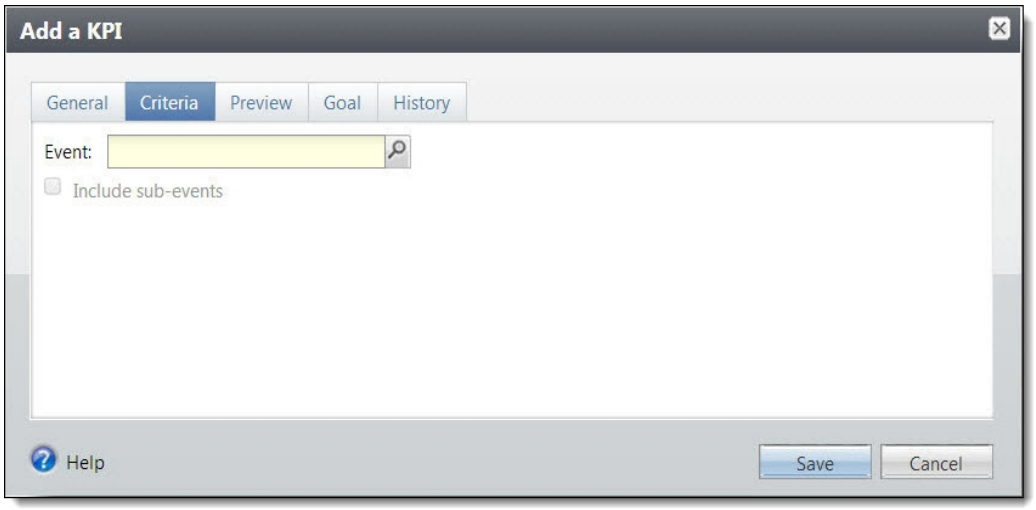
1. Access the event for which to add a KPI instance.
2. Click **Manage KPIs**, under **More information** on the explorer bar. The KPI instances page for the event appears.
3. On the KPI instances page, click **Add**. The Select a KPI screen appears.



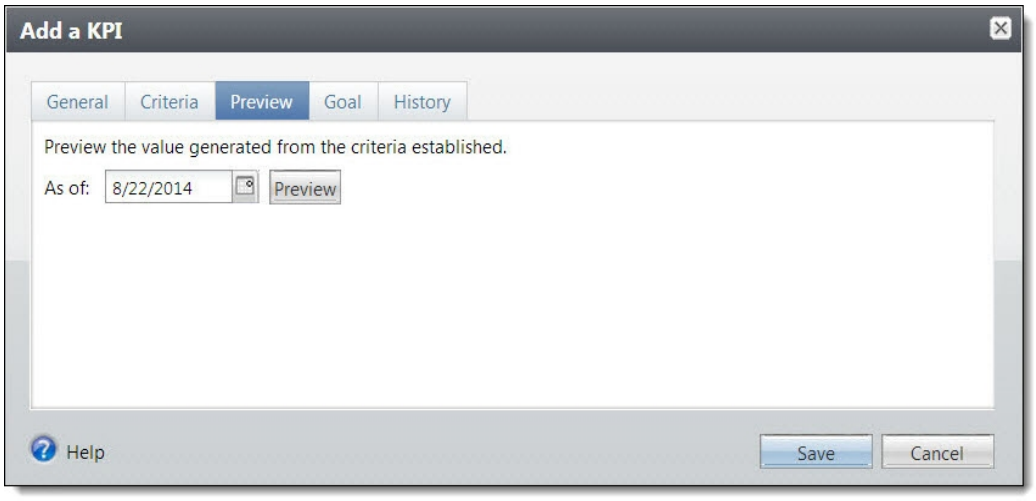
4. Under Events, select the KPI type. This KPI will appear on the KPI instances page for the event.
5. Click **OK**. The Add a KPI screen appears.



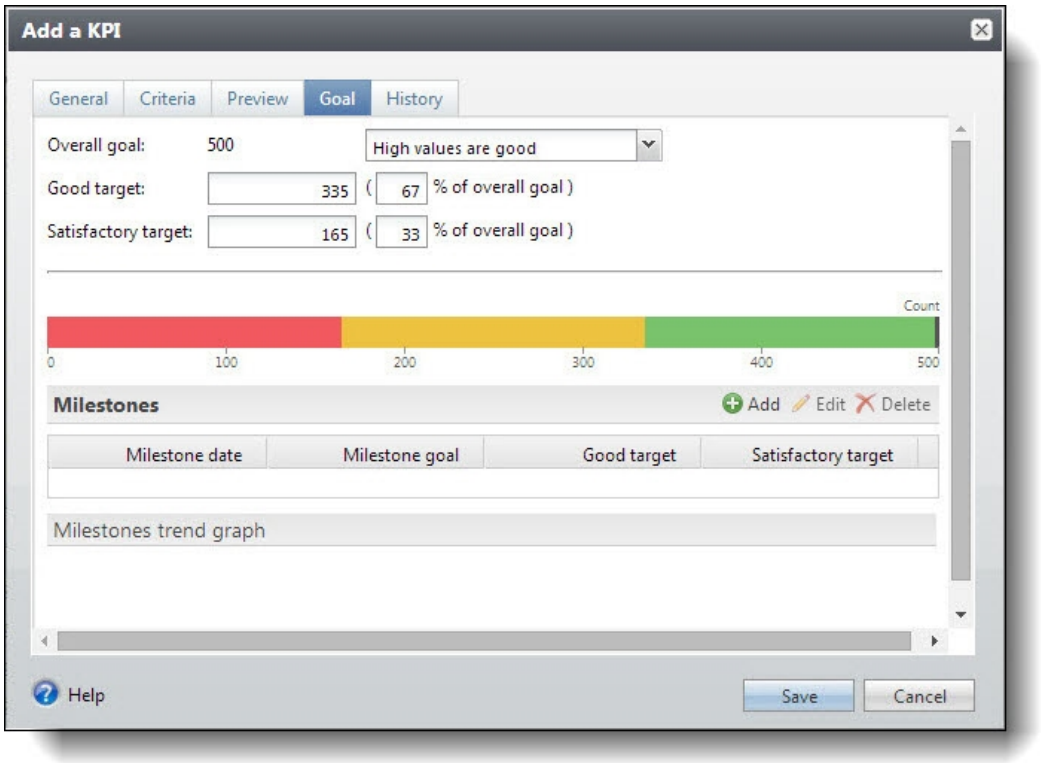
6. On the General tab, you can name the new KPI, give it a description, and select the folder.
7. On the Criteria tab, the event you selected is the default. You can click the binoculars to search for a different event.



8. If the event is a multi-level event, you can click **Include sub-events** to view information for the events and sub-events.
9. Select the Preview tab.

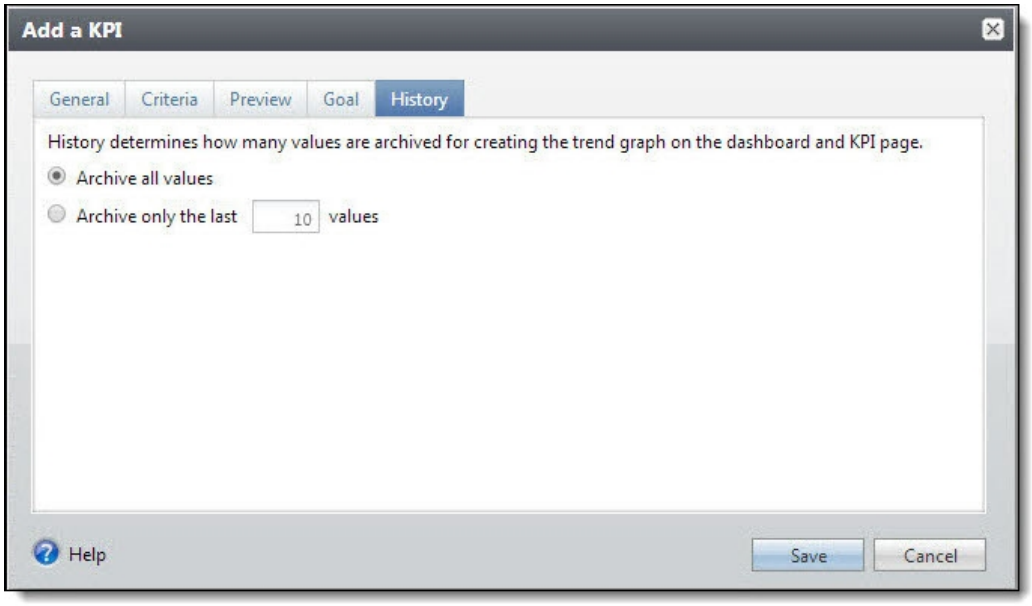


10. To see the current status of the registrant capacity for the event, select today's date and click **Preview**.
11. Select the Goal tab.



12. The **Goal value** defaults from the event for which you are creating the KPI.
13. In the **Goal aim** field, select "High values are good".
14. In the **Good target** and **Satisfactory targetl** fields, you can enter an amount y represented in green and an amount represented in yellow to indicate warnings for under performance when the KPI displays.

15. Click**Add** on the Milestones action bar to enter any milestone details, such as milestone dates and values, for the event capacity KPI.
16. Select the History tab.



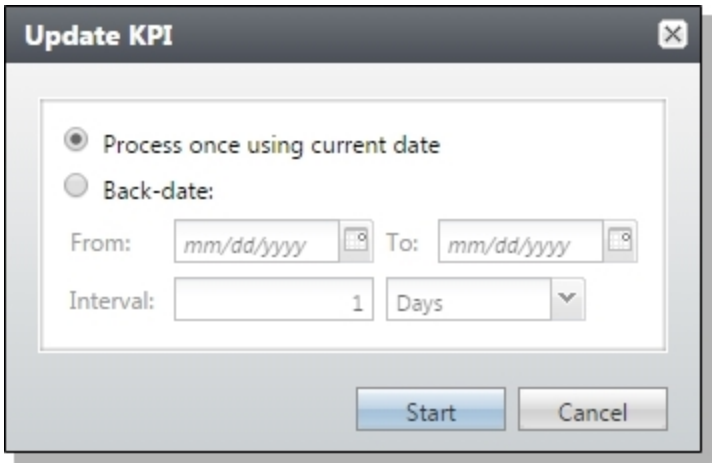
17. On the History tab, select how to handle the history records generated with each instance update. You can **Archive all values** to keep all instance values or **Archive only the last "X" values** and save only a select number of instance values.

Note: Your selection here determines how many values for the KPI instance are saved and used to create a trend graph when the KPI instance displays.

18. When you **Save** the instance, you return to the event. However, before you can view the KPI on the event, you must generate values.

Generate values for an Event KPI instance

1. Open the event for which to generate values for a KPI instance.
2. Click **Manage KPIs**, under **More information** on the explorer bar. The KPI instances page for the event appears.
3. In the grid, select green down arrows next to the KPI instance for which to generate values.
4. Click **Update KPI value** in the action bar. The Update KPI screen appears.



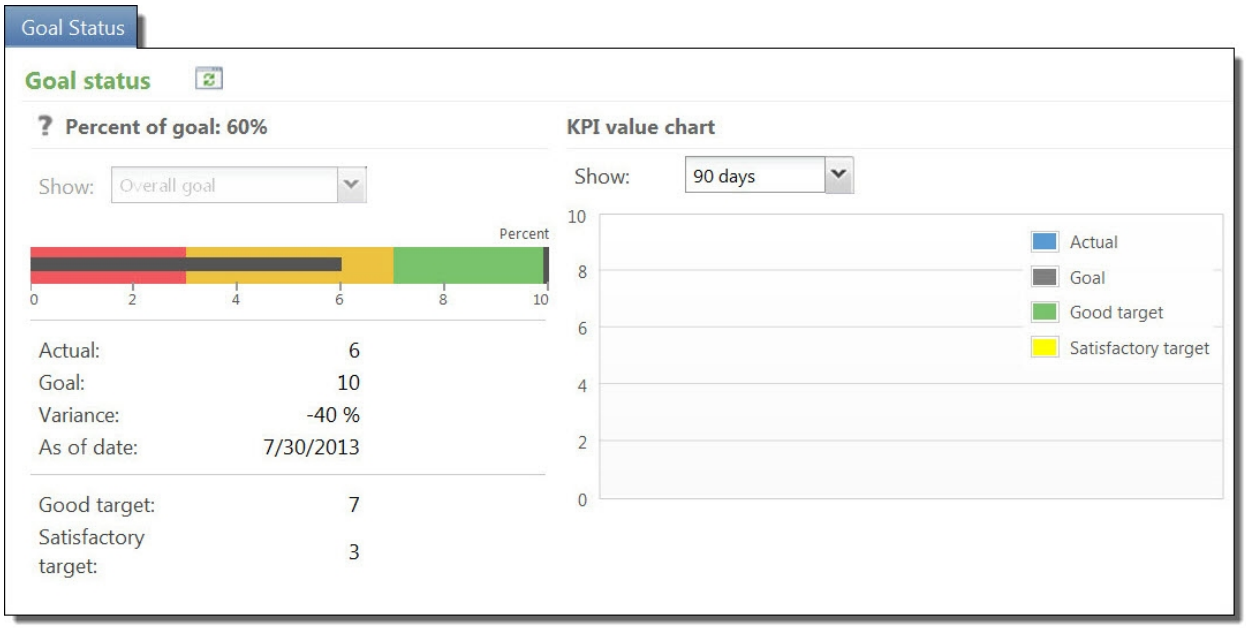
5. To view data based on the current date, select **Process once using current date**. This creates one history record relative to the current date.
6. To enter date information:
   a. Select **Back-date**. This creates history records relative to the date determined by the interval provided, such as "every 3 months" or "every 7 days." For example, you can back date a KPI between 4/1/2007 and 4/1/2008 with an interval of every 3 months to create four history records, one for each quarter.

Note: Back dating is typically used for new KPI instances, when trend information does not exist. After you create a KPI instance, you (or an administrator) can update it by scheduling a business process. Each time the process runs, the values are updated to reflect the most recent data.

   b. In the **From** field, enter the start date from which to view data.
   c. In the **To** field, enter the end date to which to view data.
   d. In the **Calculate value every** field, select how to break down the data. For example, if in the **From** and **To** fields, you select to view data for a year, in the **Calculate value** every field, you can opt to view value information for every "3" "Months".

Warning: When you back date a KPI, you erase any values that fall within the specified date range previously stored for the KPI instance.

7. Click **Start**. The KPI values are updated and the KPI instance record appears.
8. Select the Goal status tab. Information for the KPI instance appears.



Edit Events

After you add an event, you can edit details for the event. From the Event Search screen, you can select an event to edit.

Edit an event

1. Use the Event Search screen to select the event to edit. The event page appears.
2. Click **Edit event**, under **Tasks** on the explorer bar. The Edit event screen appears.
3. Make changes to the event information. The items on this screen are identical to those on the Add event screen. For more information about the items on this screen, refer to Add an Event Screen on page 30.
4. To save your changes, click **Save**.

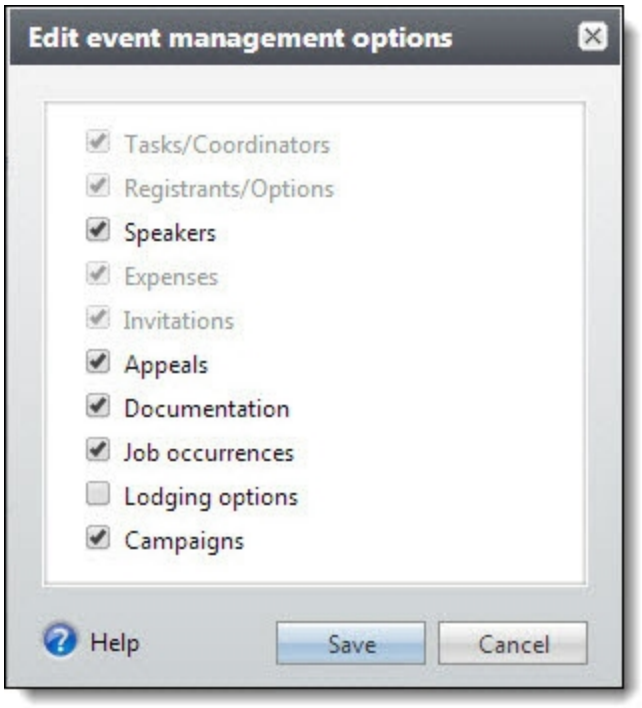
Edit Event Lookup ID

When you add an event, a lookup ID is assigned. Lookup IDs are unique, but you can edit them. From an event, click **Edit lookup ID** under **Tasks**. You can use the lookup ID when you search for events.

Edit Event Management Options

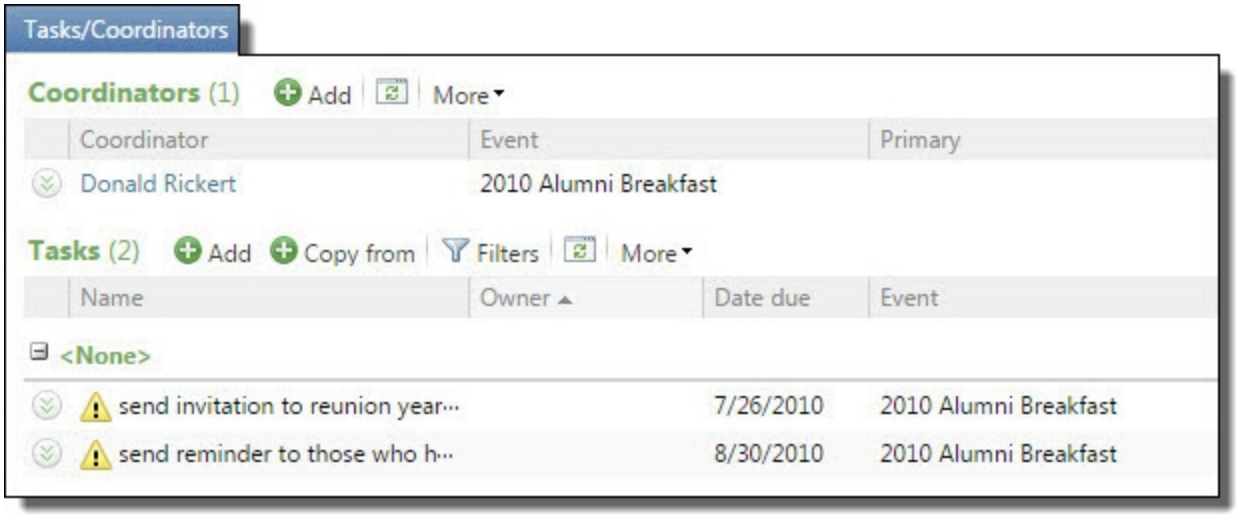
Event management options determine whether multi-level events can have registrants, speakers, lodging options, and more. Event templates set the options for multi-level events. However, you can override the options for events.

To override multi-level event options, such as whether the event can have registrants, go to the event and click **Edit event management options** under **Tasks**. Select the event options for the event, such as registrants, speakers, and expenses. When you set options for the event, the corresponding tabs appear for the event. For example, if an event can have speakers, the Speakers tab appears.



Tasks and Coordinators

On the Tasks/Coordinators tab of an event record, you can view and manage the coordinators and tasks associated with the event.



Note: Event management options determine whether multi-level events can have registrants, speakers, and lodging options, as well as the corresponding tabs. Event templates set the options for multi-level events. To override the options for events, click **Edit event management options** under **Tasks**.

Under **Coordinators**, you can view all coordinators assigned to the event and manage them. For information about how to manage the coordinators, refer to Manage Coordinators on page 43.

Under **Tasks**, you can view information about the tasks required for the event. For each task, you can view its due date and owner.

Note: If this is a multi-level event, you can manage coordinators and tasks for the event and sub-events.

To view information about a task, select it in the grid and click **Show Details**. The **Details** window displays information such as status and notes. For a completed task, you can view its completion date.

As the tasks list grows, it may be difficult to find a particular task. To reduce the number of tasks that appear, you can filter the grid. To filter the grid, select whether to view all tasks or only those due by this week or this month and click **Apply**. You can also select whether to view completed tasks. To view all tasks, click **Reset**.

From the grid, you can add and manage the event tasks. For information about how to manage the tasks, refer to Manage Tasks on page 44.

Manage Coordinators

Event coordinators are the staff members or constituent groups that oversee an event and make sure it runs smoothly, from the planning stages to the event itself. From the Tasks/Coordinators tab, you can add and manage the coordinators associated with the event.

Note: The only constituent groups which can be event coordinators are committees with the **Can coordinate events** checkbox marked.

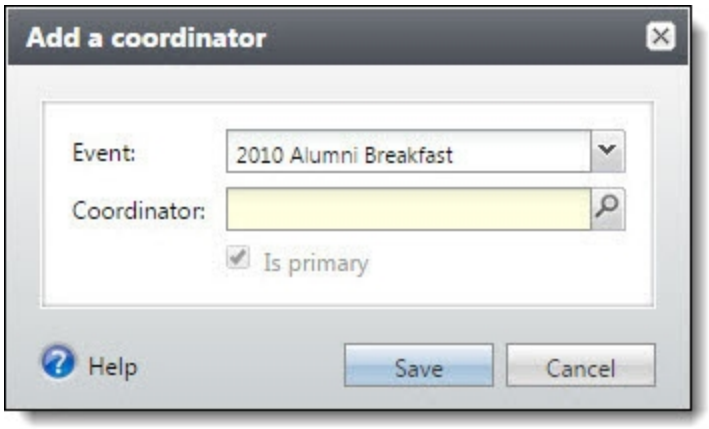
You can also designate a primary coordinator for the event. The primary coordinator is displayed in the event summary view.

Add Event Coordinators

On the Coordinators tab of an event page, you can assign coordinators to the event. Events do not require coordinators.

Add a coordinator

1. On the event record, select the Tasks/Coordinators tab and click **Add** under **Coordinators**. The Add a coordinator screen appears.



2. If this is a multi-level event, you can add coordinators to the event and any sub-events. In the **Event** field, select the event for the coordinator.
3. In the **Coordinator** field, select the constituent to assign as the coordinator.
4. You can mark one coordinator as the primary coordinator for the event. The primary coordinator is displayed in the event summary view.
5. Click **Save**. You return to the Tasks/Coordinators tab.

Manage Tasks

An event task is a job required in preparation for an event. You can assign tasks to staff members or to groups or group members involved with the event. From the Tasks/Coordinators tab, you can manage the tasks required for the event. For example, as task owners complete their tasks, you can mark the tasks as complete from this tab.

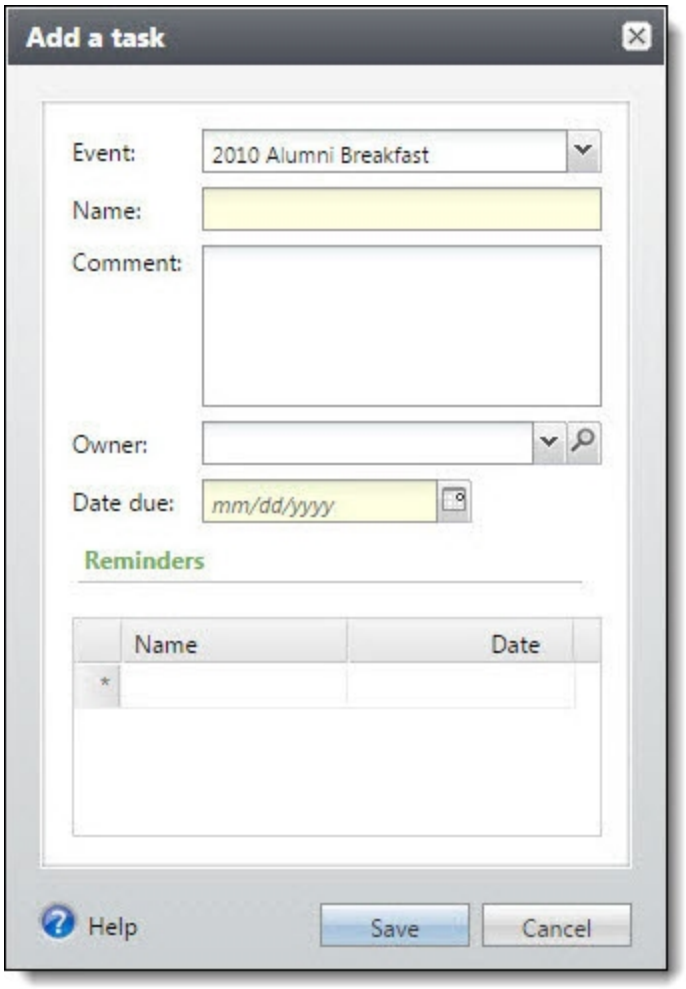
Add Event Tasks

An event task is a job required in preparation for an event. You can assign tasks to staff members or to groups or group members involved with the event.

Tip: If an event requires the same tasks as another event, you can copy the tasks from one event to another. For information about how to copy tasks, refer to Copy Event Tasks on page 46.

Add an event task

1. On the Tasks/Coordinators tab of an event record, click **Add** under **Tasks**. The Add a task screen appears.



2. Select the event to which to add the task. For example, for a multi-level event, add the task to the event or a sub-event.
3. In the **Name** field, enter a unique name or description to identify the task.
4. In the **Comment** field, enter instructions or explanations for the task.
5. In the **Owner** field, select the event coordinator to assign the task, or search for and select the staff member or constituent group to assign the task. For information about how to add a coordinator to the event, refer to Add Event Coordinators on page 43.
6. In the **Date due** field, select the date by which the owner must complete the task.
7. To set up email alerts to remind the owner to complete the task, under **Reminders**, enter the name and date for each alert.
8. Click **Save**. You return to the Tasks/Coordinators tab.

Add a Task Screen

Screen Item	Description
Event	For a multi-level event, you can add tasks for the event or a sub-event. Select the event for which to add the task.
Name	Enter a unique name or description to identify the task. If you configure a reminder for the task, this appears as the subject line of the email alert.
Comment	Enter instructions, comments, or explanations for the task.
Owner	Select the coordinator to which to assign the task, or search for and select the staff member or constituent group to perform the task.
Date due	For an active task, select the date by which the owner must complete the task.
Status	When you edit the task, this field appears. Select whether the task is active or completed.
Date completed	For a completed task, select the date the owner completes the task.
Reminders	To set up email alerts to remind the owner to complete the task, enter the name and date for each alert. When you edit the task, the grid displays whether a reminder has been sent. To send an email alert as a reminder, your organization must first configure a task reminder email alert from *Administration*.

Edit Event Tasks

After you add an event task, you can edit its details, such as to update its status.

Edit a task

1. On the Tasks/Coordinators tab of an event record, select a task under **Tasks** and click **Edit**. The Edit task screen appears.
2. Make changes. The items on this screen are the same as on the Add a task screen. For information about the options, refer to Add Event Tasks on page 44.

Tip: If you change the status to "Completed," select the date when the owner completed it.

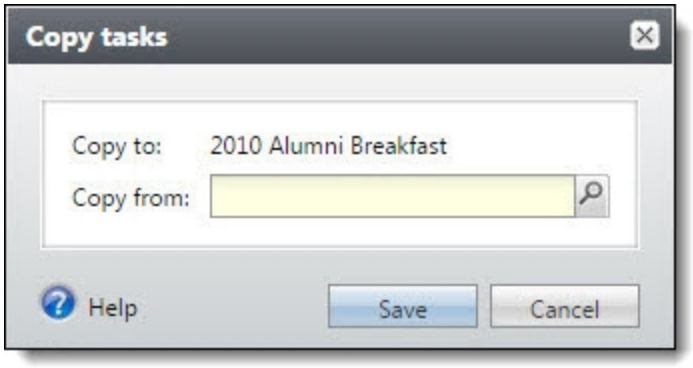
3. Click **Save**. You return to the Tasks/Coordinators tab.

Copy Event Tasks

If an event requires the same tasks as another event, you can copy the tasks from one event to another.

Copy tasks from another event

1. On the Tasks/Coordinators tab of an event record, click **Copy from** under **Tasks**. The Copy tasks screen appears.



2. The **Copy to** field displays the current event.
3. In the **Copy from** field, enter the name of the event to copy tasks form. To search for an event, click the binoculars. A search screen appears.
4. To return to the Tasks/Coordinators tab, click **Save**. Under **Tasks**, the copied tasks appear.
5. You can edit the tasks as necessary. For information, refer to Edit Event Tasks on page 46.

Registrations

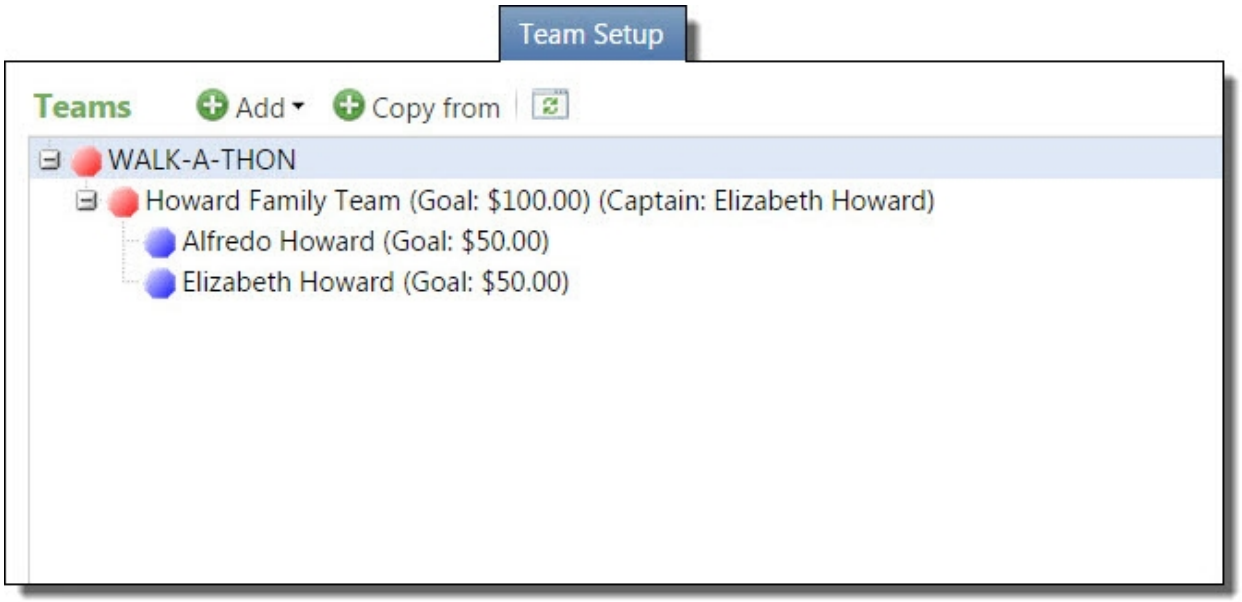
On an event page, the Registrations tab contains information about the constituents registered for the event. On the Registrants tab, you can manage information for registrants and registrant guests. You can add, edit, or delete registrants and guests. You can view registrant information and update registrant status. For more information about registrants, refer to Registrants and Guests on page 85.

Note: Event management options determine whether multi-level events can have registrants, speakers, and lodging options, as well as the corresponding tabs. Event templates set the options for multi-level events. However, you can override the options for events when you click **Edit event management options** under **Tasks**.

Team Fundraising:Team Setup Tab

Team fundraising is used to help raise awareness and funds for a particular cause. With the Team Setup tab on appeals and events, you can manage teams, team captains, and team fundraisers. An event must first be marked as a team event.

The Team Setup tab contains information about the teams for a team fundraising appeal or event. On this tab, you can add, edit, and delete teams from the hierarchy. You can add team fundraisers, select team captains, and assign goals for teams and team fundraisers.



Fundraising Teams

Teams are groups of fundraisers who work together to meet a monetary goal. You can use the Team Setup tab of an appeal or event to add teams, team fundraisers, and captains, copy teams and fundraisers, and to set fundraising goals for the fundraisers.

To add an existing team to an appeal or event, you can copy the team so you do not have to recreate it in the appeal or event.

Add Teams

In the tree view on the Team Setup tab, you can add a team. You can also add a sub-team to an existing team.

Edit Teams

After you add a team to an event or appeal, you can edit it from the Team Setup tab. For example, if a team designates a new goal, you can edit the goal amount.

Delete Teams

After you add a team to an event or appeal, you can delete it as from the Team Setup tab.

Copy Teams

To add an existing team to an appeal or event, you can copy the team so you do not have to recreate it in the appeal or event.

Team Fundraisers

Team fundraisers are individuals who work to meet a monetary goal for a team fundraising appeal or event. You can add a team fundraiser directly to an appeal or event. A team fundraiser is not required to be part of a team. When you add team fundraisers to an event, you are prompted to register the team fundraiser if they are not registered.

Add Team Fundraisers

You can add a team fundraiser directly to an appeal or event. A team fundraiser is not required to be part of a team. When you add team fundraisers to an event, you are prompted to register the team fundraiser if they are not already registered.

Edit Team Fundraisers

After you add a team fundraiser to an event or appeal, you can edit the team fundraiser from the Team Setup tab. For example, if the team fundraiser designates a new goal, you can edit the goal amount. On the Team Setup tab of an event or appeal, you can select a team fundraiser to edit.

Delete Team Fundraisers

After you add team fundraisers to an event or appeal, you can delete fundraisers from the Team Setup tab.

Team Captains

Team captains are the leaders of your fundraising teams. You can add team captains when you create teams, or you add them later. To edit team captains, you edit the team and add or remove captains.

Add Team Captains

When you add team captains to an event, you are prompted to register them for that event if they aren't already registered.

Promote Team Captains

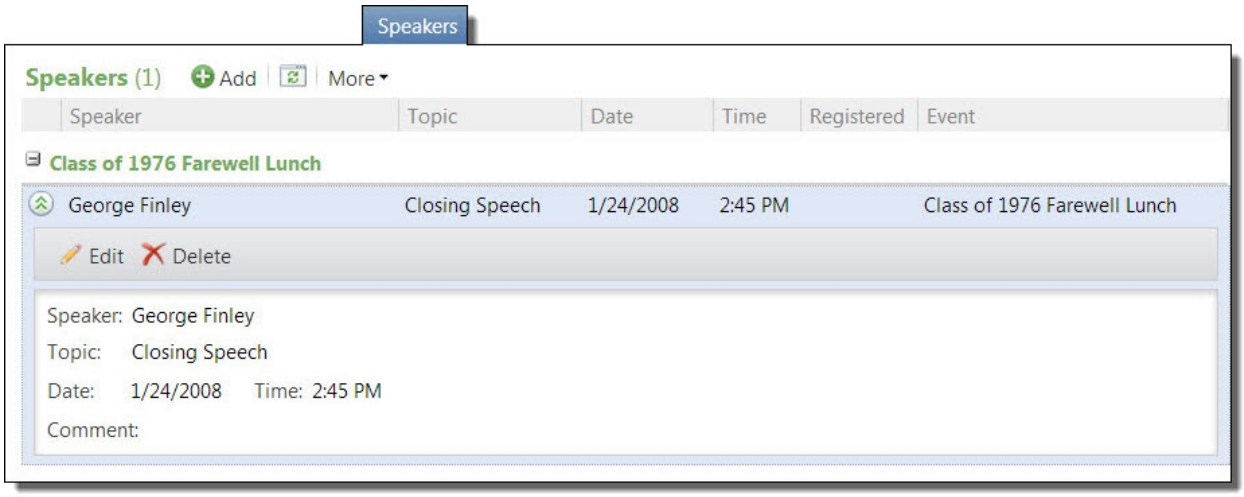
If a team captain is already a team fundraiser for a team in the tree view, you can designate the team fundraiser as the captain of the team.

Demote Team Captains

If a team captain cannot fulfill the responsibilities of team captain but still wants to participate in the fundraising event, you can demote the captain to a fundraiser on the team.

Event Speakers

Your event may feature a speech such as a welcome address or seminar session. To view and manage the participants who give presentations at an event, select the Speakers tab on the event record.



Note: Event management options determine whether multi-level events can have registrants, speakers, and lodging options, as well as the corresponding tabs. Event templates set the options for multi-level events. However, you can override the options for events when you click **Edit event management options** under **Tasks**.

Under **Speakers**, you can view the speakers associated with the event and information about their presentations such as topic and scheduled date and time. You can also view whether a speaker is also a registrant for the event. To view comments for a speaker, such as preferences or presentation description, select the speaker in the grid and click the down arrows on the action bar. A window appears and displays the speaker, presentation information, and comments for the speaker.

Note: If this is a multi-level event, you can manage speakers for this event and sub-events.

To view registration information about a speaker who is a registrant, click the name of the speaker in the grid. The registration record for the speaker appears. For information about the registration record, refer to Event Registrant Record on page 93.

From the grid, you can add and manage the event's speakers.

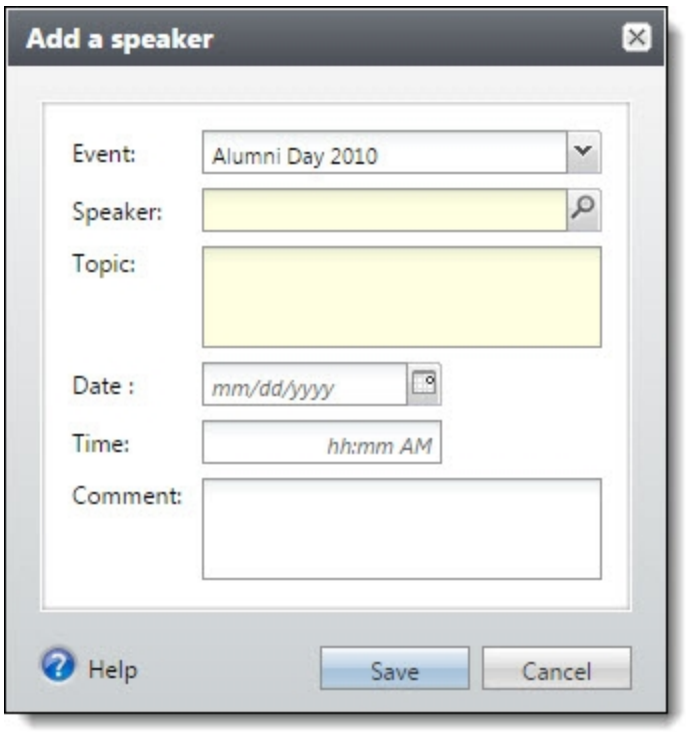
Add Event Speakers

From the Speakers tab, you can add information about the speakers scheduled for an event. Speakers must have an individual constituent record in your database. When you add a speaker to an event, you enter information about the presentation the speaker gives, such as topic and scheduled time.

Note: When an individual is both a speaker and a registrant at an event, the Participation tab on the registrant record displays information about the scheduled speech. For information about the Participation tab, refer toRegistrant Participation on page 102.

Add a speaker

1. Open the record of the event for which to add a speaker.
2. Select the Speakers tab.
3. Under **Speakers**, click **Add** on the action bar. The Add a speaker screen appears.

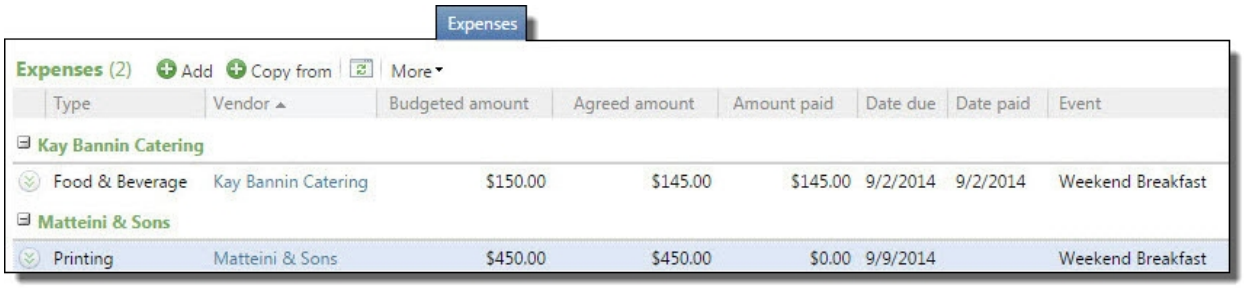


4. If this is a multi-level event, you can add speakers for this event and any sub-events. In the **Event** field, select the event for the speaker.
5. In the **Speaker** field, search for and select the individual constituent scheduled to speak at the event.
6. In the **Topic** field, enter the subject or title of the presentation the speaker gives.
7. In the **Date** and **Time** fields, enter when the speaker is scheduled to speak. You must schedule the presentation within the dates and times of the event.

8. In the **Comments** field, enter information about the speaker, such as a request to have ice water near the podium, or the presentation, such as a detailed explanation of the topic.
9. Click **Save**. You return to the Speakers tab.

Expenses

The Expenses tab contains information about the expenses budgeted and accrued when you host the event. On this tab, you can add, edit, and delete expenses for the event. You can track the amount budgeted for each expense, as well as the amount paid.



Note: Event management options determine whether multi-level events can have registrants, speakers, and lodging options, as well as the corresponding tabs. Event templates set the options for multi-level events. However, you can override the options for events when you click **Edit event management options** under **Tasks.**

In the summary area of the event page, you can use the event expenses thermometer to view expense information. The expense thermometer compares the amount budgeted for expenses and the amount spent so far. The result appears as a percentage and as a visual representation on the thermometer.

Note: For multi-level events, you can manage expenses for the event and sub-events.

To view information about a vendor, select an expense in the grid and click **Go to vendor**. The vendor view for the constituent appears. For information about the vendor view, refer to Vendor View on page 54.

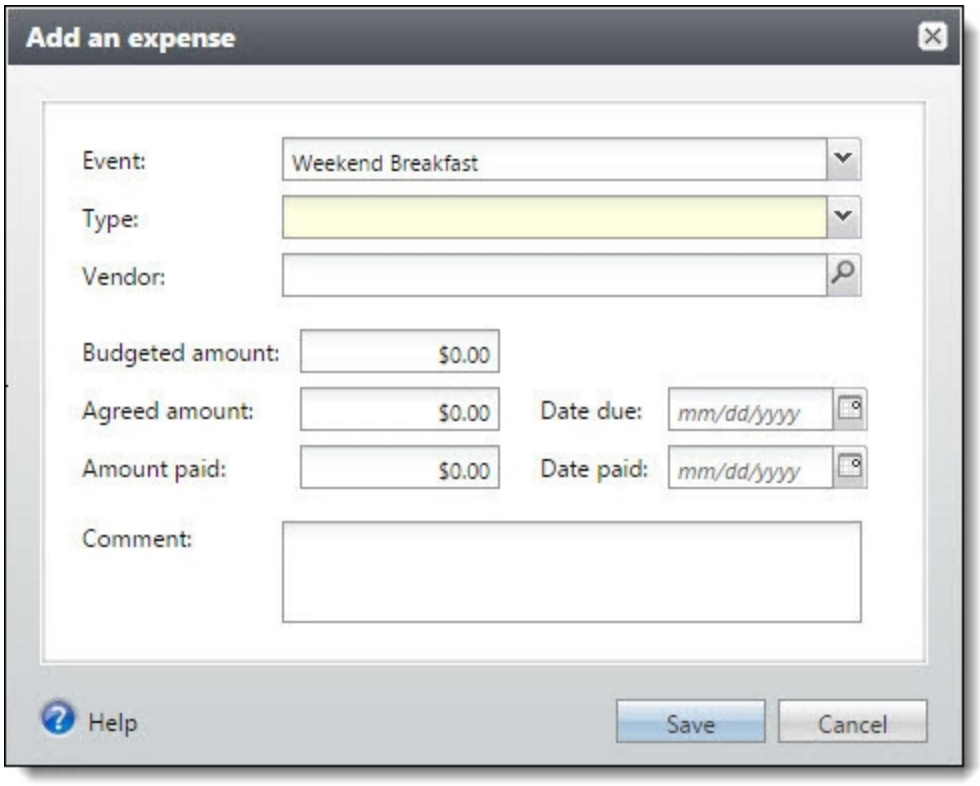
Add Expenses

An event expense is a debt your organization incurs or plans to incur when you host an event. For example, you may incur expenses such as catering costs, rental fees, mailing costs, and printing fees. You can use the Expenses tab to record information and ensure accurate reporting on the success of your event.

Note: Event expense types are defined in *Administration*. Your system administrator configures the event expense type selections.

Add an expense

1. On the event record, select the Expenses tab and click **Add**. The Add an expense screen appears.



2. If this is a multi-level event, you can add expenses for this event and sub-events. In the **Event** field, select the event for the expense.
3. Enter information about the expense. For information about the items on this screen, refer toAdd an Expense Screen on page 53.
4. Click **Save**. You return to the Expenses tab.

Add an Expense Screen

Screen Item	Description
Event	Select the event for the expense. If this is a multi-level event, you can add expenses for the event and sub-events.
Type	Select the type of expense. Your system administration configures the available selections. If you have the necessary security rights, you can click **Type** to add new options.
Vendor	Click the binoculars to search for a vendor. Vendors must be constituents in your database.
Budgeted amount	Enter the total amount your organization budgeted for this expense.
Agreed amount	Enter the total amount your organization and the vendor agreed upon for the service.

Screen Item	Description
Date due	Select the payment due date for the expense.
Amount paid	After you make a payment for the expense, use this field to record the total amount paid.
Date paid	After you make a payment for the expense, use this field to record the date.
Comment	Enter information about the expense.

Copy Expenses

If an event requires the same expenses as a previous event, you can copy the expenses from one event to another. When you copy expenses, the **Agreed amount** from the original event is copied to the new event as the **Budgeted amount**.

Copy expenses from another event

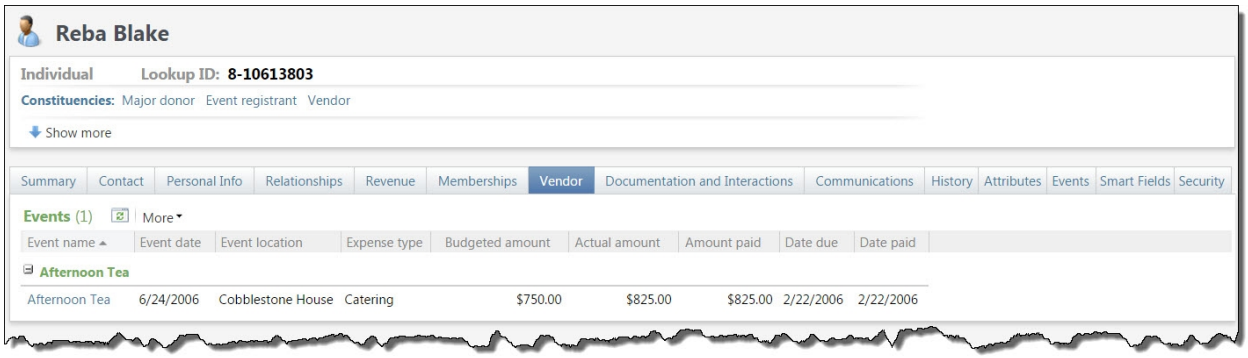
1. On the event record, select the Expenses tab and click **Copy from**. The Copy expenses screen appears.
2. The **Copy to** field displays the name of the current event.
3. In the **Copy from** field, enter the name of the event to copy expenses from. To search for an event, click the magnifying glass. A search screen appears.
4. To return to the Expenses tab, click **Save**.

Go To Vendor

To view the constituent as a vendor, from the Expenses tab of an event, select the vendor in the grid.The vendor's constituent page appears.

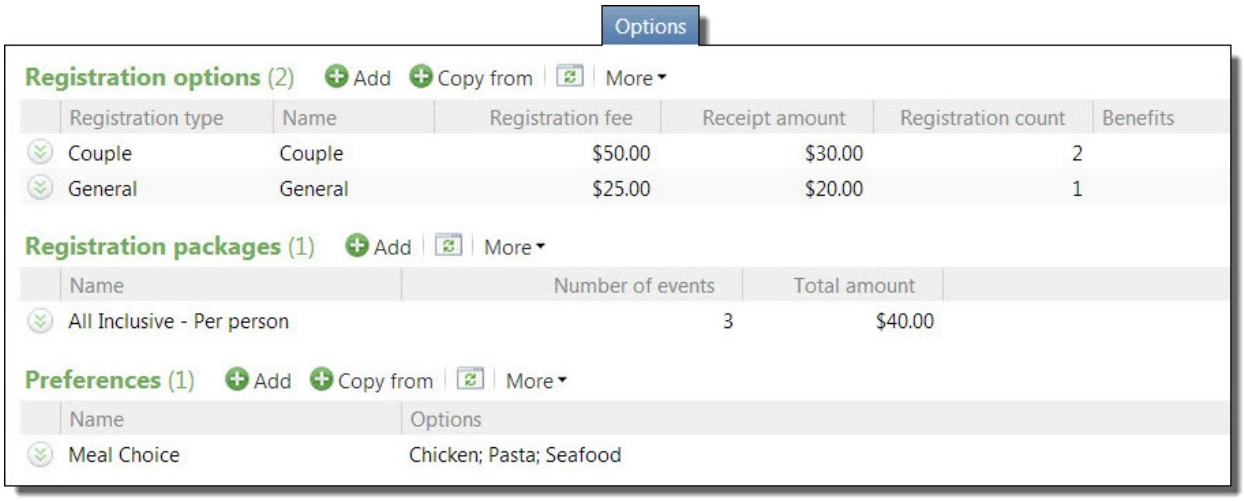
Vendor View

If a constituent in your database is a vendor for your events, you can view a vendor page that displays information about the events for which the constituent is assigned as a vendor. To view the constituent as a vendor, from the Expenses tab of an event, select the vendor in the grid. The vendor's constituent page appears, where you can click **Vendor** on the **View as** menu to view the vendor page.



Event and Registration Options

The Options tab contains information about the registration and preference options for the event.



Under **Registration options**, you can view the types of registrations for the event. For example, for a class reunion, you can create a registration option with a registration type of Individual and a cost of $15, and a registration type of Couple with a cost of $20. From this grid, you can add and manage registration options for the event.

Note: Event management options determine whether multi-level events can have registrants, speakers, and lodging options, as well as the corresponding tabs. Event templates set the options for multi-level events. However, you can override the options for events when you click **Edit event management options** under **Tasks**.

The **Registration packages** grid appears on the record of an event that has sub-events. In this grid, you can view information about the registration packages for the event. For example, for a weekend-long event with supporting events such as a golf tournament, luncheon, and dinner dance, you can create a registration package of "Full Weekend" that includes all three supporting events. From the grid, you can add and manage registration packages for the event.

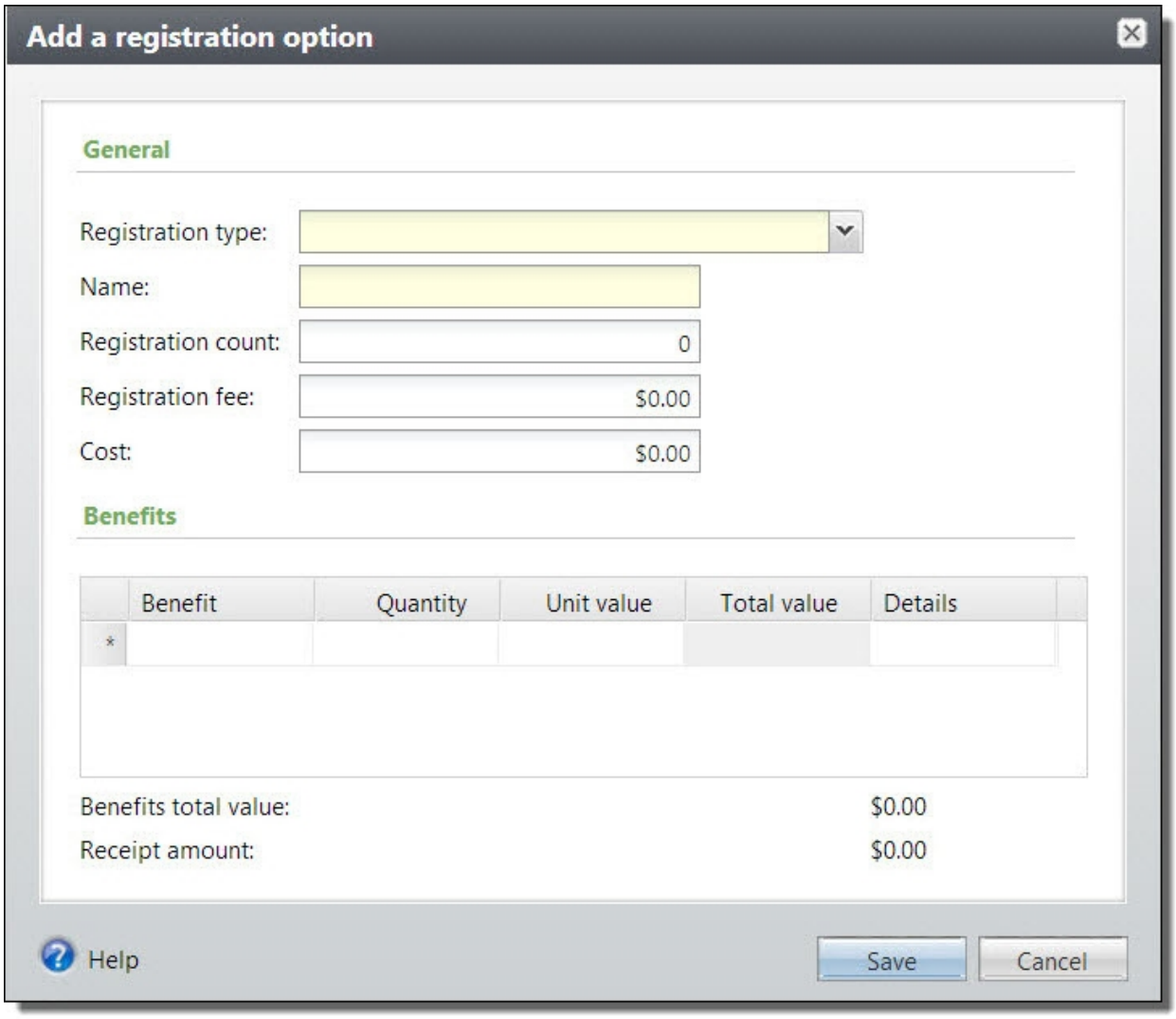
Under **Preferences**, you can view information about event preferences. For example, for an event that includes food, you can use meal preferences to track which registrants prefer a vegetarian food option. From the grid, you can add and manage preferences for the event.

Add Registration Options

On the Options tab of an event page, you can set up registration options. For example, you can set up a registration option with a registration type of General and a cost of $20 and a registration type of Child with a cost of $10. You can set up as many registration options for the event.

Add a registration option

1. Open the record of the event for which to add a registration option.
2. Select the Options tab.
3. Under **Registration options**, click **Add** on the action bar. The Add a registration option screen appears. For information about the items on this screen, refer to Add a Registration Option Screen on page 58.



4. Under **General**, select the type of registration for which to add the option.
5. Enter a unique name to identify the registration option.
6. In the **Registration count** field, enter the number of registrations to associate with the registration option. For example, for registration option of Golf Foursome, enter 4.
7. In the **Registration fee** field, enter the cost of the registration option for the registrant.
8. In the **Cost** field, enter the cost of the registration option, per registrant, for your organization.
9. Under **Benefits**, search for and select the benefits a registrant receives as a thank-you gift for the registration option. For each benefit, enter the quantity the registrant receives and edit the unit value or detail information.
10. Click **Save**. You return to the Options tab.

Add a Registration Option Screen

The table below explains the items on the Add a registration option screen. For information about how to view this screen, refer to Add Registration Options on page 56.

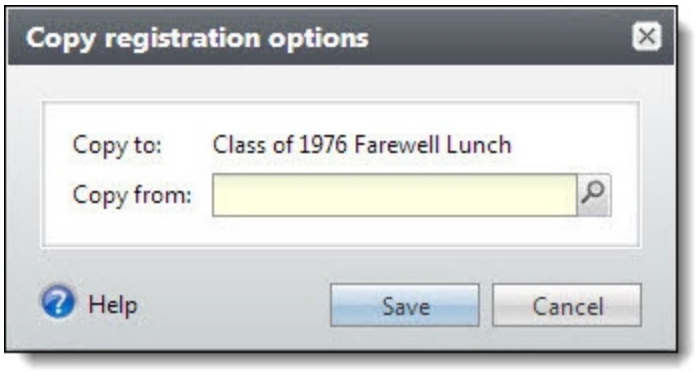
Screen Item	Description
Registration type	Select the registration type associated with the option. Your system administrator configures the available registration types. For information about registration types, refer toEvent Restriction Types on page 19.
Name	Enter a unique name to identify the registration option. By default, the registration type appears.
Registration count	Enter the number of registrations to associate with the option. For example, for a Golf Foursome, enter 4. By default, the registration count associated with the registration type appears.
Registration fee	Enter the amount a registrant must pay to use the registration option to attend the event. The registration fee may be only the cost of the event, or the cost plus a donation.
Cost	Enter the cost of registration option for your organization. The cost can include expenses your organization incurs for the event such as catering, facility rental fees, or flowers, divided by the number of registrants that use the registration option.
Benefit	Search for and select the benefits a registrant that uses the registration option receives.
Quantity	Enter the quantity of each benefit in the registration option. For example, a registration option for a golf foursome might include four of each benefit, one for each member of the foursome.
Unit value	Enter the individual value of each benefit included in the registration option. By default, the unit values from the benefit catalog appears.
Total value	This column displays the value of each benefit, based on the unit value and quantity.
Details	Enter information about each benefit. For example, for a t-shirt, enter its size or color.
Benefits total value	This field displays the total value of the benefits associated with the registration option.
Receipt amount	The receipt amount is the tax deductible portion of the registrant's payment. The receipt amount is the cost of the registration fee, less the cost of the option and the value of its benefits.

Copy Registration Options from an Event

If you use the same registration options for a variety of events, you can copy this information from one event to another. You can copy registration options to a single event from one or multiple other events.

Copy registration options from another event

1. Open the record of the event for which to add registration options.
2. Select the Options tab.
3. Under **Registration options** frame, click **Copy from** on the action bar. The Copy registration options screen appears.



4. In the **Copy from** field, search for and select the event to copy registration options.
5. To return to the Options tab, click **Save**.

Add Registration Packages

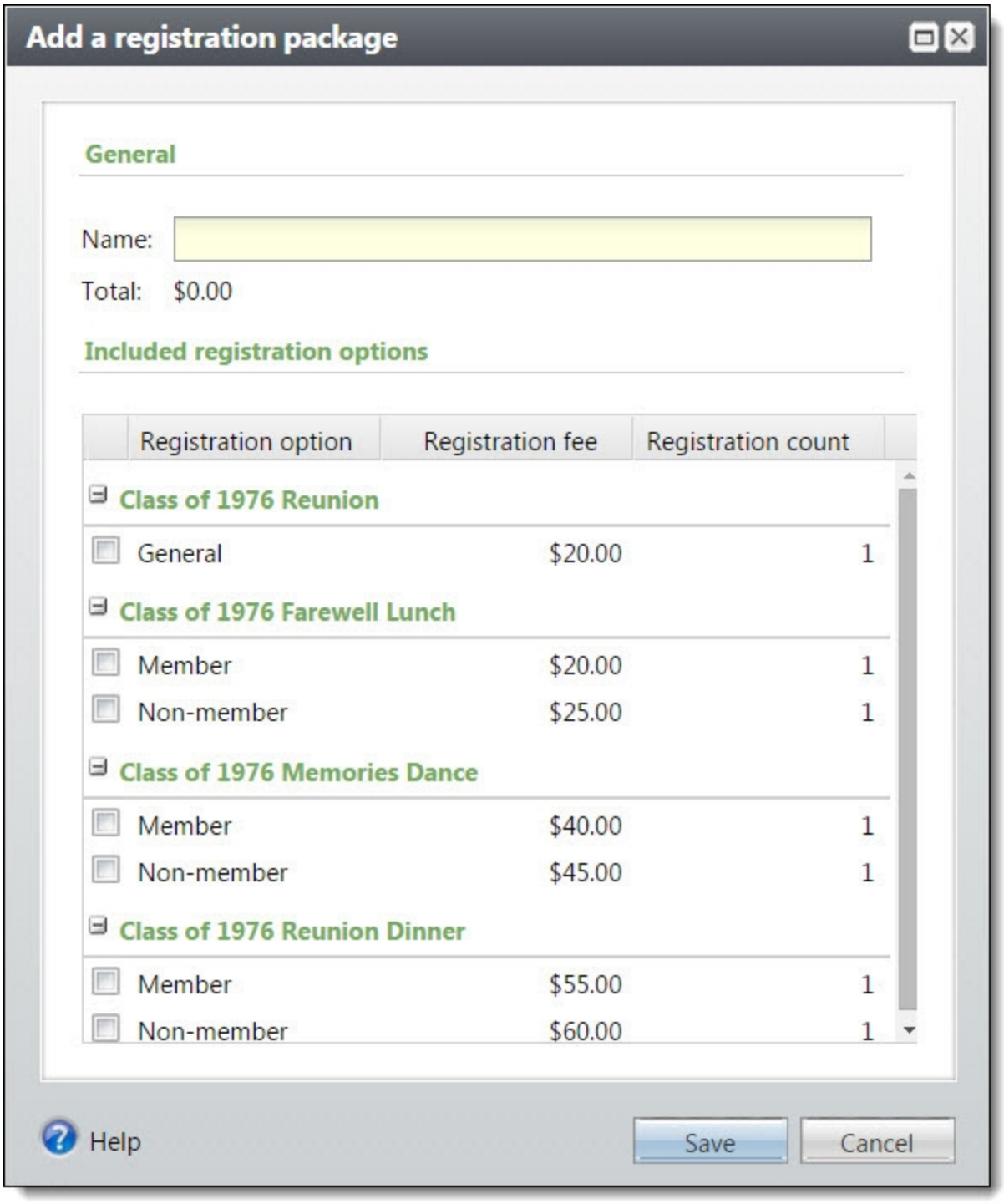
For large, multi-level events, you can use registration packages to combine registration options from each of the supporting events. With registration packages, constituents can register for multiple events in one action.

Add a registration package

1. Open the event to add a package.

Note: The event must have supporting events with registration options defined in order to create registration packages.

2. Select the Options tab.
3. Under **Registration packages**, click **Add**. The Add a registration package screen appears.



4. Enter a name for the package and mark the checkboxes for the registration options to include. For more information about the items on this screen, refer to Add a Registration Package Screen on page 61.

Note: To create a registration package, you must select more than one registration option. However, you can select only one registration option from each event.

5. To save the registration package, click **Save**.

Add a Registration Package Screen

The table below explains the items on this screen.

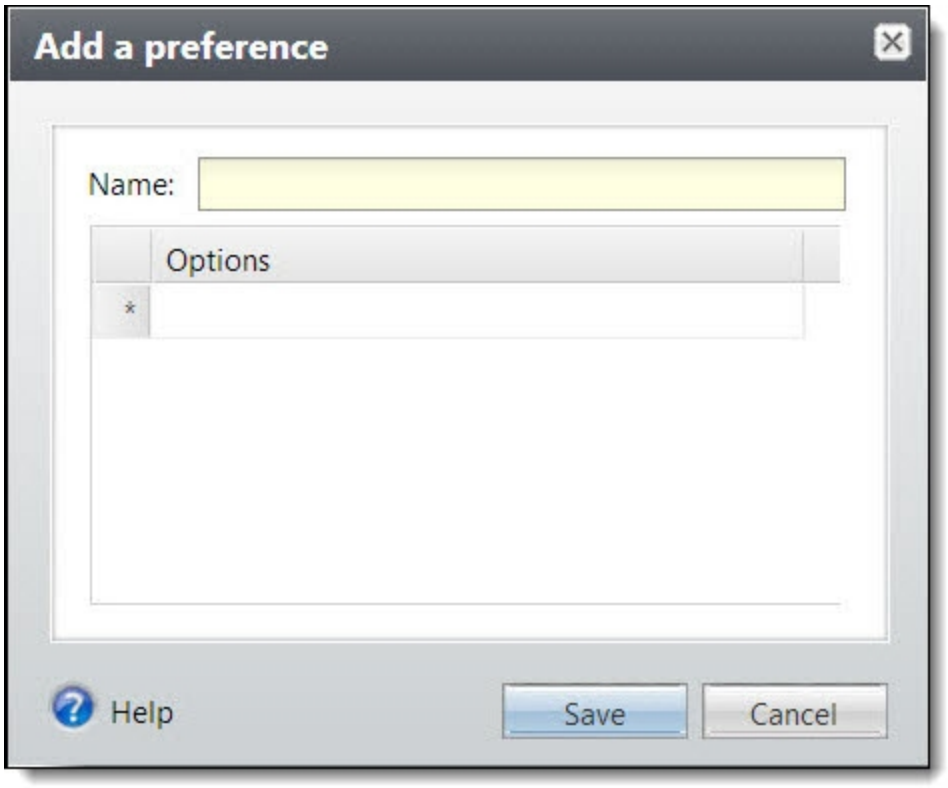
Screen Item	Description
Name	Enter a name that accurately describes the registration package.
Total	Each time you mark a checkbox in the **Included registration options** frame, the **Total** field updates to display the current total value of all registration options marked.
Registration option	The **Registration option** column displays the registration options for each supporting event, such as "Member" or "Nonmember." To add a registration option to the registration package, mark its corresponding checkbox. To remove a registration option, unmark its checkbox.
Registration fee	The Registration fee column displays the cost of each registration option.
Registration count	This column displays the number of registrations for each registration option.

Add Registration Preferences

For many events, you can capture preference information such as T-shirt size or meal preferences. When someone registers for the event, you can include these preferences for the registrant.

Add a registration preference

1. Open the event for which to add a preference.
2. On the Options tab, click **Add** under **Preferences**. The Add a registration preference screen appears.



3. Enter a name for the preference, such as "Shirt size," and enter the options available for the preference.
4. Click **Save**.

Copy Event Preferences

If you use the same registration preferences for a variety of events, you can copy this information from one event to another. You can copy event preferences to a single event from one or multiple other events.

Copy event preferences from another event

1. Open the event for which to copy event preferences.
2. On the Options tab, click **Copy from** under **Preferences**. The Copy event preferences screen appears.
3. In the **Copy from** field, click the magnifying glass to open the Event Search screen and select the event to copy event preferences.
4. Click **Save**.

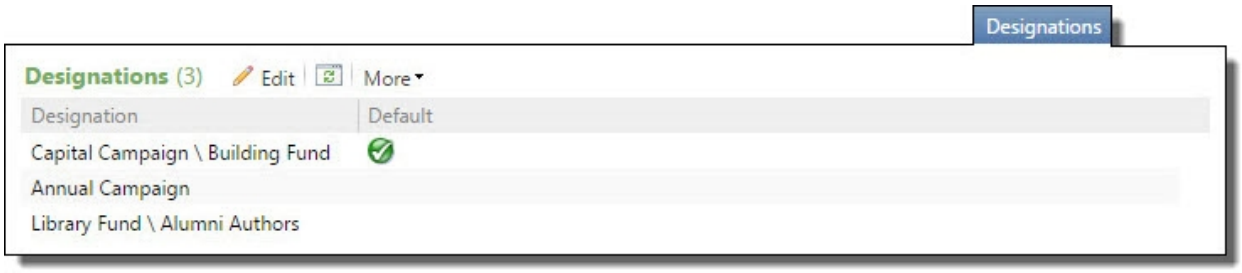
Invitations

The Invitations tab contains information about the constituents to invite to the event. The **Event Invitees** grid displays a summary of invitees for the event. In this grid, you select to view a list of all invitees for the event and you can add new invitees or copy invitees from another event. For more information about invitations and the Invitations tab, refer toInvitations on page 127.

Note: Event management options determine whether multi-level events can have registrants, speakers, and lodging options, as well as the corresponding tabs. Event templates set the options for multi-level events. However, you can override the options for events when you click **Edit event management options** under **Tasks**.

Event Designations

On the Designations tab, you can select designations to associate with an event's fees. When you select designations, you also select a default designation. Fees apply to the default designation. You can change the designation and amount, on the Designation tab of the registrant record. For information about how to view the Designation tab of the registrant record, refer to Event Registrant Record on page 93.



Note: The Designation tab only appears if you select **Event allows designations on fees** on the Add an event screen. For information about how view the Add an event screen, refer to Add Events on page 28.

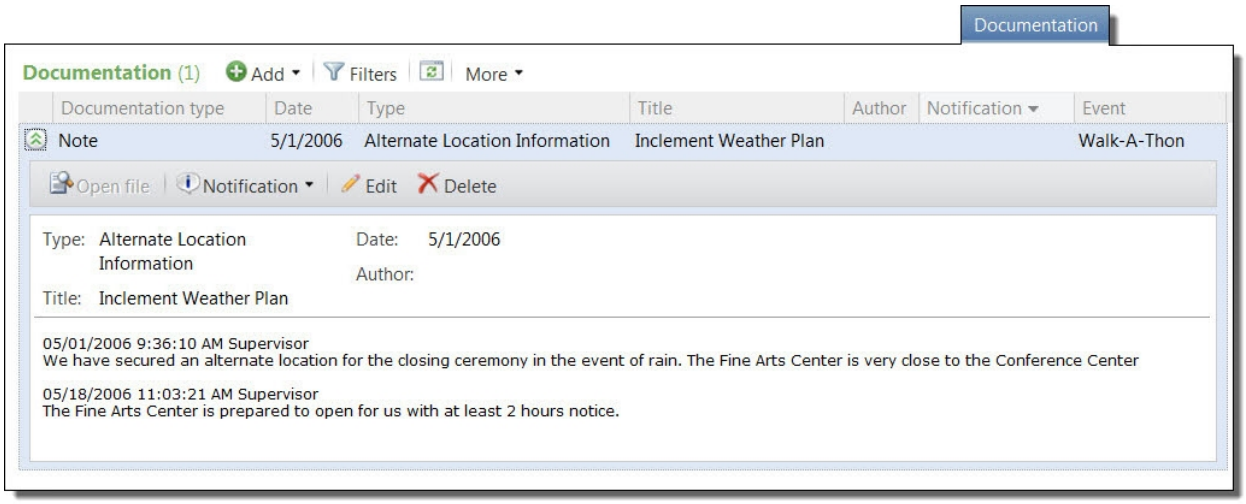
Edit designations for an event fee

1. Open the record of the event for which to edit designations.
2. Select the Designations tab.
3. Click **Edit**. The Edit designations screen appears.
4. Select a designations to associate with the event.
5. Select a default designation.
6. Click **Save**. You return to the Designations tab.

Documentation

Note: If this is a multi-level event, you can manage documentation for this event and sub-events.

You can add notifications to notes on an event record. For more information, refer toNotifications on page 65.



Note: Event management options determine whether multi-level events can have registrants, speakers, and lodging options, as well as the corresponding tabs. Event templates set the options for multi-level events. However, you can override the options for events when you click **Edit event management options** under **Tasks**.

Notes

On the Documentation tab, you can add notes to track helpful or interesting information about your records.

Add Notes

On the Documentation tab, you can track notes about your records.

Add a note

1. Go to the Documentation tab of a record.
2. Click **Add note**. The Add a note screen appears.
3. Select a note type. Enter the date, title, author, and the content of the note.
4. Click **Save**. You return to the Documentation tab.

Add a Note Screen

Screen Item	Description
Type	Select the type of note. The system administrator configures note types.
Date	Enter the date of the note.
Title	Enter the title, or purpose, of the note.
Author	To search for an author, click the magnifying glass. A search screen appears.
Notes	Enter the content of the note.

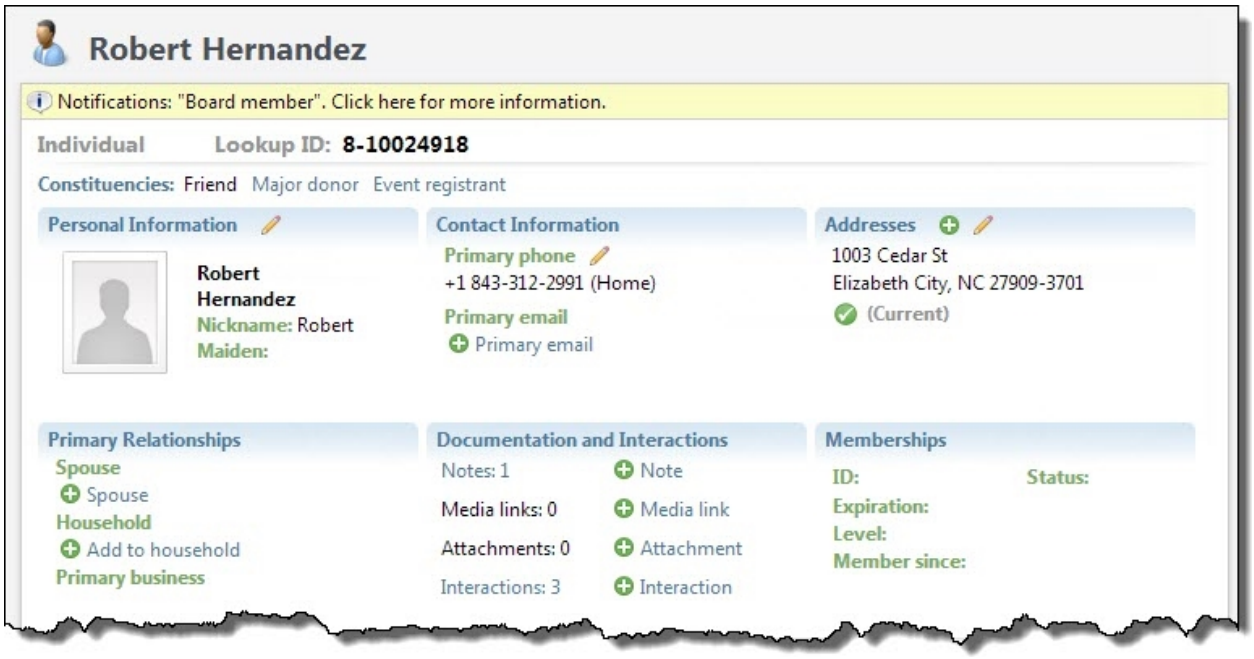
Notifications

Notifications allow you to share important information about a record or a group of records with users. You can determine whether all users should receive a notification or only a targeted group of users. For example, you notify all users to when they open the record of a board member.

Notifications are not available for every record type. They are available only for:

- Bank Account Adjustment records
- Bank Account Deposit records
- Bank Account Deposit Correction records
- Constituent records
- Event records
- Membership records
- Revenue records

Notifications appear on the information bar of a record.



Note: Notifications for constituents also appear in the Constituent Window of a revenue batch.

You can also set notifications to appear on a separate screen when users view a record. The notification screen appears the first time a user views a record during a session. If you leave the record and return within 60 minutes, the notification screen does not appear again. However, if you return after more than 60 minutes, the notification screen appears again.

You can create notifications for groups of records in *Administration*. You can also create notifications for a record from the Documentation tab of the record.

Add Notifications to Specific Records

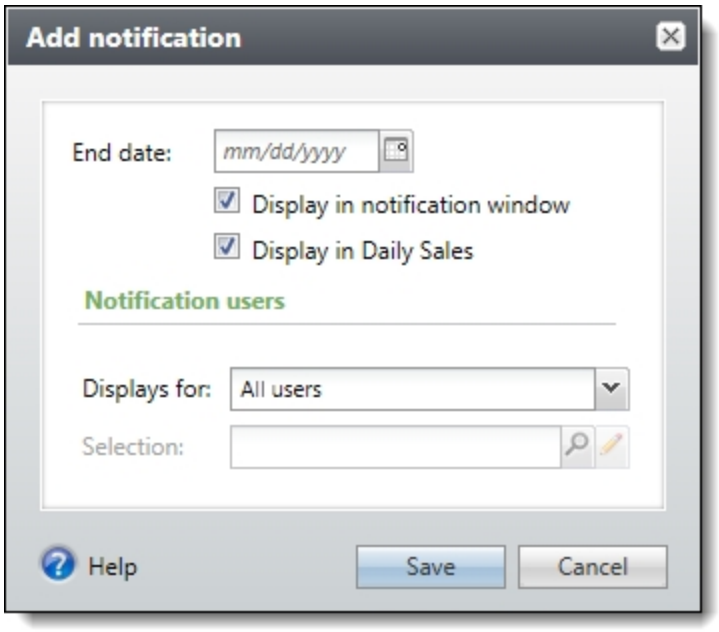
On the Documentation tab, you can add a notification to a note on a record. You can select or create a note with the notification's message and add the notification to the note.

Add a notification

1. Go to the Documentation tab of a record.
2. Select a note to use for the notification. The note's title and text appear as the notification.

Note: You must add a note to the record before you can add a notification.

3. Click **Add notification**. The Add notification screen appears.



4. Select how long to display the notification, whether to display it in a notification window, and the users who view the notification.
5. Select how long to display the notification, whether to display it in a notification window and in Daily Sales, and the users who view the notification.

Note: When you select **Display in Daily Sales**, we recommend you avoid smart queries and complex query criteria for notifications because it could cause a degradation in performance.

6. Click **Save**. You return to the Documentation tab.

Media Links

On the Documentation tab, you can save links to websites or related materials stored outside of the program.

Add Media Links

When you add a media link, you enter the website address.

Add a media link

1. Go to the Documentation tab of a record.
2. Click **Add media link**. The Add a media link screen appears.
3. Select a media link type. Enter the date, title, and author. Enter the URL for a website.
4. Click **Save**. You return to the Documentation tab.

Add a Media Link Screen

Screen Item	Description
Type	Select the type of media link. The system administrator configures media link types.
Date	Enter the date of the media link.
Title	Enter the title, or purpose, of the link.
Author	To search for an author, click the binoculars. A search screen appears.
Media URL	Enter the URL for a website.

Attachments

You can attach items to records. When you attach a file, the program stores a copy in the database.

Add Attachments

You can use attachments to track additional details about records. When you attach a file, the program stores a copy in the database.

Add an attachment

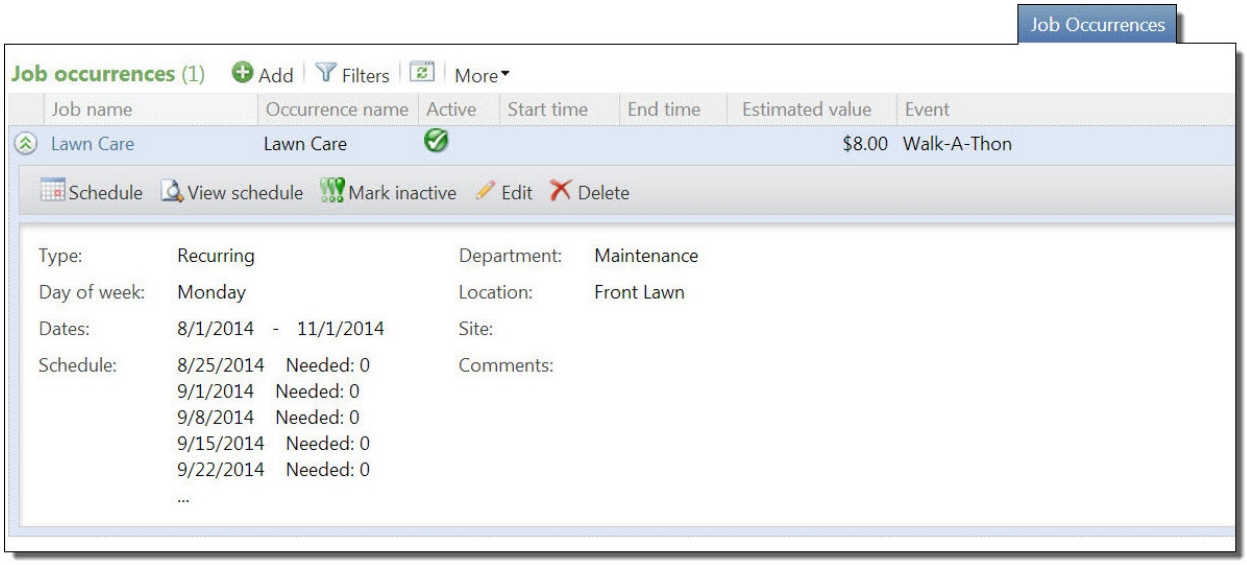
1. Go to the Documentation tab of a record.
2. Click **Add attachment**. The Add an attachment screen appears.
3. Select an attachment type. Enter the date, title, and author. To search for the attachment, click **Choose file**.
4. Click **Save**. You return to the Documentation tab.

Add an Attachment Screen

Screen Item	Description
Type	Select the type of attachment. The system administrator configures attachment types.
Date	Enter the date of the attachment.
Title	Enter the title, or purpose, of the attachment.
Author	To search for the author, click the binoculars. A search screen appears.
File	To locate the attachment, click **Choose file**. To view an attachment, click **Open file**. To remove an attachment, click **Clear file**.

Job Occurrences

Your event may require the use of volunteers to perform jobs such as crowd control or the preparation of invitations. To view and manage the jobs for volunteers at an event, select the Job Occurrences tab on the event record.



Note: Event management options determine whether multi-level events can have things such as registrants, speakers, and lodging options, as well as the corresponding tabs. Event templates set the options for multi-level events. However, you can override the options for events when you click **Edit event management options** under **Tasks**.

Under **Job Occurrences**, you can view the jobs associated with the event. For each occurrence, you can view information such as the start and end times for the job and whether the occurrence is active. To view any information about a job occurrence, select the occurrence in the grid. The window appears and displays information such as job department, location, and comments entered.

To find a job, you can filter the occurrences that appear in the grid. On the action bar, click **Filters**, select the criteria of the occurrence to view and click **Apply**. You can select to view occurrences by frequency type such as one-time, ongoing, or recurring; location; or job department. You can also select whether to display only active job occurrences. To remove the filters and display all occurrences, click **Reset** on the action bar.

From the grid, you can manage the event's job occurrences and their job schedules.

- You can view the record of a job and manage information such as volunteer traits. To view the job record for an occurrence, select the occurrence in the grid.
- You can access the job occurrence schedule to view volunteers assigned to an occurrence. From the schedule, you can match and assign the job occurrence to volunteers. To view the schedule for a job occurrence, select the occurrence in the grid and click **Schedule** on the action bar.

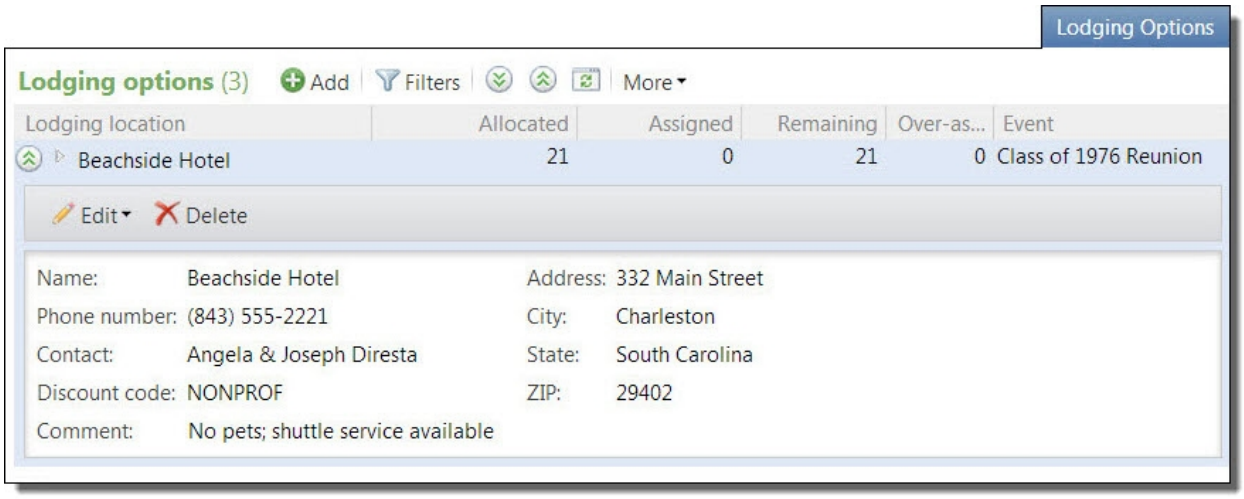
- You can generate a Job Schedule report for a job occurrence. This report displays dates and volunteers associated with an occurrence. To view the Job Schedule report for a job occurrence, select the occurrence in the grid and click **View schedule** on the action bar.
- You can add and manage job occurrences associated with the event. To add a job occurrence, click **Add** on the action bar. When you add a job occurrence from an event, you select the job to associate with an event and enter information about its occurrence. From the grid, you can also select a job occurrence and edit or delete it from the event.

Note: If this is a multi-level event, you can add and view job occurrences for this event and sub-events.

For more information about the job record, the job occurrence schedule, the Job Schedule report, or how to add or manage job occurrences, refer to the *Volunteers Guide*.

Lodging Options

You may have registrants who travel to your event from some distance and require lodging facilities such as hotels or motels. To accommodate your registrants, your organization may negotiate with lodging facilities to reserve a number of rooms for the event. Your organization may also provide on-site lodging accommodations for registrants and guests. To view the lodging facilities and rooms allocated for an event, select the Lodging Options tab.



Note: Event management options determine whether multi-level events can have registrants, speakers, and lodging options, as well as the corresponding tabs. Event templates set the options for multi-level events. However, you can override the options for events when you click **Edit event management options** under **Tasks**.

Under **Lodging options**, the lodging locations with rooms allocated for the event appear. For each location, you can view the number of room allocated for the event, how many of those rooms are assigned to registrants, how many remain at the location, and how many room are assigned to more registrants than capacity.

Note: If this is a multi-level event, you can manage lodging options for this event and any sub-events.

To view a breakdown of the room counts by type for a location, click its plus sign. As users associate registrants with lodging options for the event, the program updates the number of rooms that remain of each type at the location. To view the room types and counts for all locations, click **Expand all** on the action bar.

To view additional information about a location, select it in the grid. The window appears and displays the discount code and comments for the location.

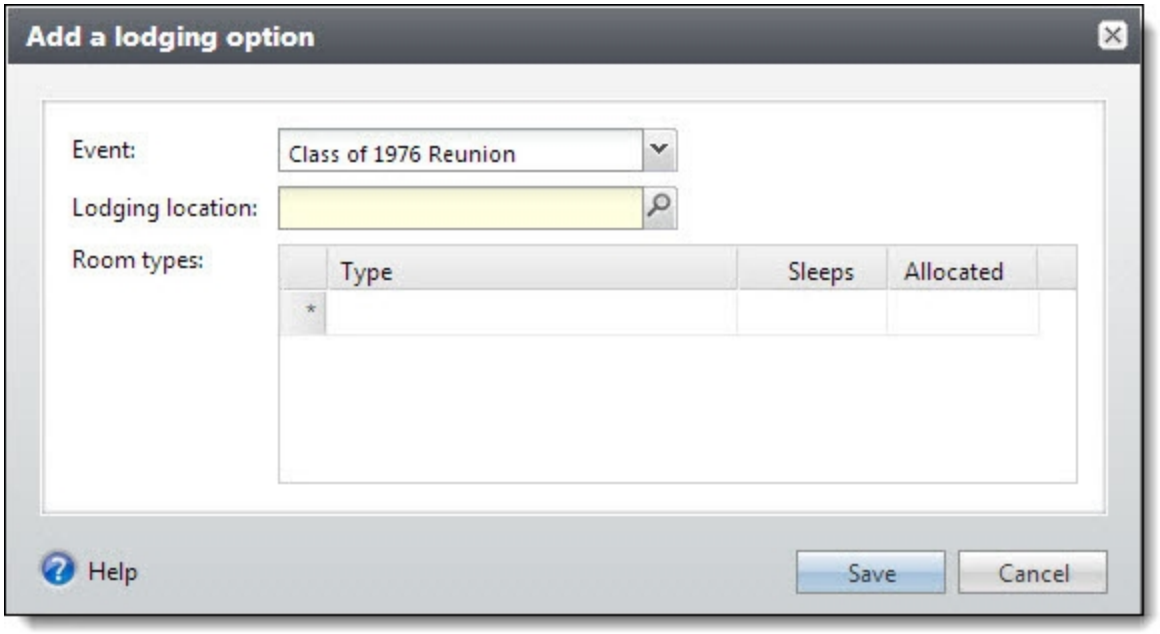
From the grid, you can add and manage lodging locations.

Add Lodging Options for an Event

To accommodate your registrants, your organization may negotiate with multiple lodging facilities to reserve a number of rooms for the event. On the Lodging options tab of an event record, you can add information about the lodging locations that have rooms allocated for the event. When you add a lodging option, you select the lodging location and enter information about the rooms reserved for your registrants.

Add a lodging option

1. Open the record of the event for which to add a lodging option.
2. On the Lodging Options tab, click **Add** under **Lodging options**. The Add a lodging option screen appears.



3. If this is a multi-level event, you can add lodging options for this event and sub-events. In the **Event** field, select the event for the lodging option.
4. Search for and select the lodging location with rooms allocated for the event. If your location does not appear, you can add it.
5. In the **Room types** grid, enter information about the rooms allocated at the location.

a. In the **Type** column, select the types of rooms allocated at the location, such as Smoking and Non-smoking or by bed size. You configure room types when you add the lodging location to the database.
b. In the **Sleeps** column, enter the number of occupants each room type holds.
c. In the **Allocated** column, enter the number of room reserved for each type.

6. Click **Save**. You return to the Lodging Options tab.

GL Mapping Tab

To successfully post transactions, you must set up GL Ledger information, such as accounts, transaction mappings, and segment mappings in *Administration*.

When you create segment mappings for items, such as appeals or events, the GL Mapping tab appears on the item's record. For example, once you select appeal as a segment in an account structure, when you view the appeal record, the GL Mapping tab appears. From the GL Mapping tab, you can view the segment value and edit the mapping.

Note: You create segment mappings in *Administration*. To view the Map Segment page, select an account system from the GL Ledger Setup page. From an account system page, click **Define Segment Mappings**.

To view and manage the GL Ledger mapping of an item, select the GL Mapping tab on the item's record. Additional examples of items with potential segment mappings are: fundraising purposes, events, and membership levels.

Note: The GL Mapping tab does not appear on records that are used as segments in more than one account structure within the database.

When you apply a revenue transaction toward an item, such as a designation, the GL mapping information automatically appears as a default on the revenue record. From the revenue record's GL Mapping tab, you can edit the segment mapping.

Edit mapping

1. On the record of an item such as a designation or appeal, select the GL Mapping tab.
2. Under GL **mapping**, click **Edit**. The Edit mapping screen appears.
3. Select a different segment value to associate with this item.

   When you edit a segment value from the Edit mapping screen, the value is automatically updated on the Map Segment page in *Administration*. To view the Map Segment page, click **Define Segment Mappings** on the GL Ledger Setup page of *Administration*.
4. To return to the GL Mapping tab, click **Save**.

Attributes

Attributes allow you to store useful information about events. You can set up event attributes in *Administration*, and you can add them to events on the Attributes tab of the event page or on the Event Details tab of the Friends Asking Friends Configure page. Event attributes can supplement the information stored on event records so that you can track information that is important to your organization. You can create an unlimited number of attributes for events.

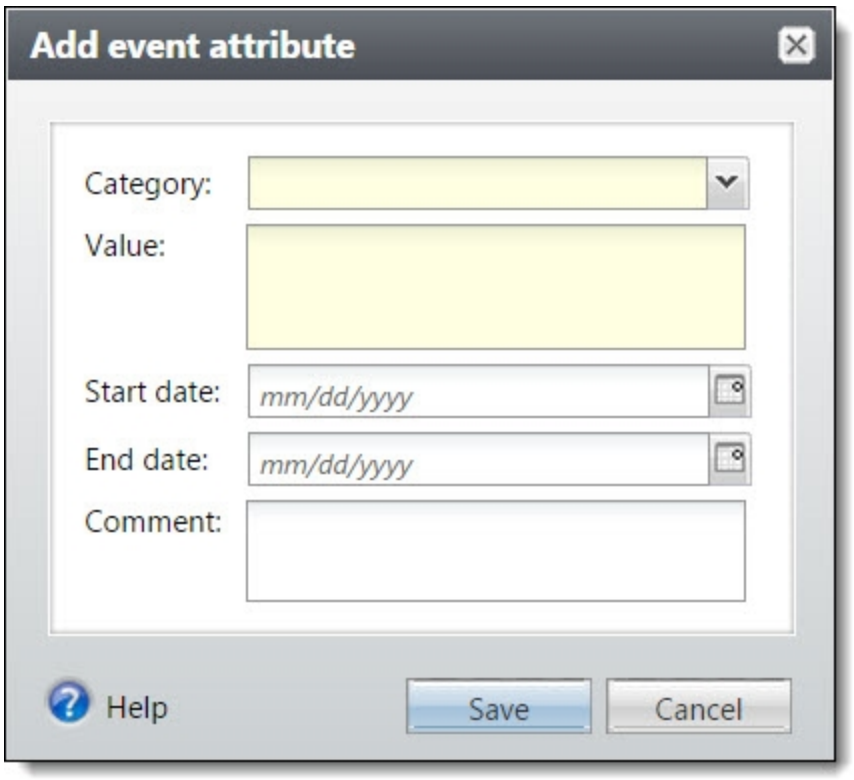
Add Event Attributes

On the Attributes tab of an event page, you can add attributes for the event. You can use attributes to manage and track important details about your event.

Note: The Attributes tab appears for events only if your system administrator configured event attributes. For more information about how to add attribute categories, refer to the *Administration Guide*.

Add an event attribute

1. On the Attributes tab of an event record, click **Add**. The Add event attribute screen appears. For information about the items on this screen, refer toAdd Event Attribute Screen on page 74.



2. In the **Category** field, select a category for the attribute. Your system administrator sets up attribute categories in *Administration*.
3. In the **Value** field, enter a value or description for the attribute. For example, if the category is Awards, you might enter "Service Award." Make sure to enter a value that accurately identifies the attribute throughout your database.
4. In the **Start date** and **End date** fields, enter the dates when the attribute is valid for the event.
5. In the **Comment** field, enter information or comments about the attribute.
6. Click **Save**. You return to the Attributes tab.

Add Event Attribute Screen

The table below explains the items on this screen.

Screen Item	Description
Category	Select a category for the attribute. Your system administrator sets up attribute categories in *Administration*.
Value	Enter a value or description for the attribute. For example, if the category is Awards, you can enter "Service Award." Make sure to enter a value that accurately identifies the attribute throughout your database.
Start date/End date	Enter the start date and end date when the attribute is valid for the event.
Comment	Enter comments or information about the attribute.

Web Forms

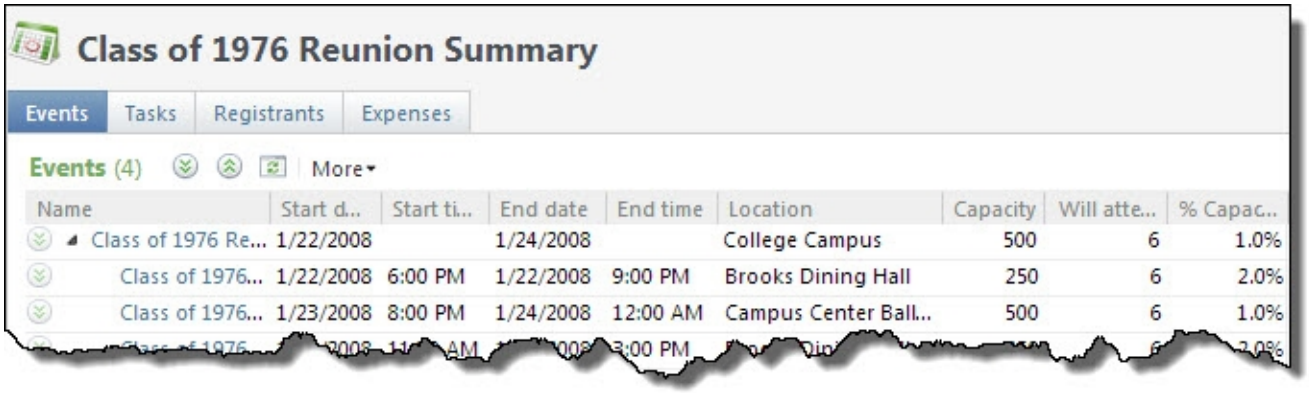
On the event record, you can enter an event description to display on web forms. When you create a web form in *Web* to allow website users to register for the event online, this description appears on the web form.

Add an event description to display on web form

1. On the event record, select the Web Forms tab.
2. Click **Edit**. The Edit event description for web forms screen appears. In the editor, enter the description. When you create a web form in *Web* for this event, the description appears on the web form.
3. Click **Save**. You return to the event record.

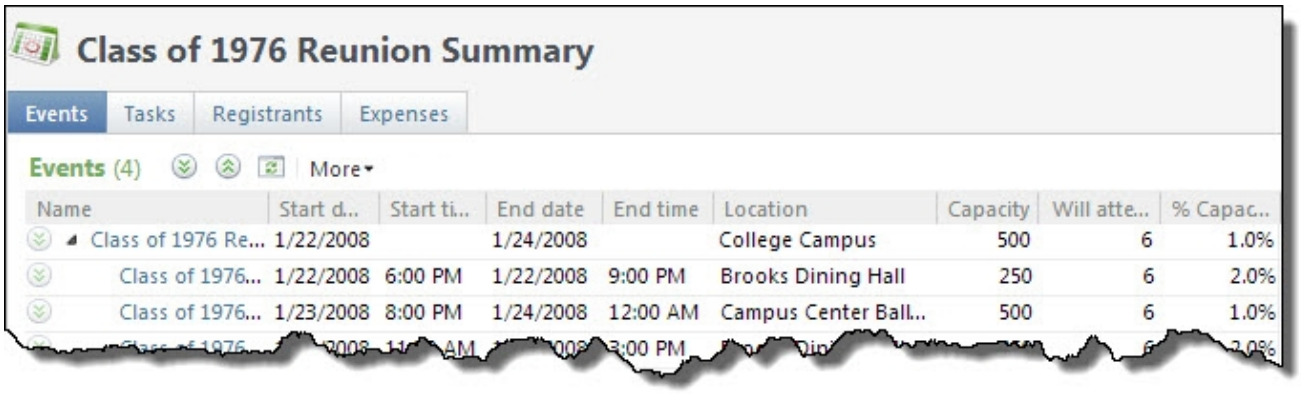
Event Summary Page

For an event with associated supporting events, from the main event page, you can view an event summary page. The event summary is a view in which all tasks, registrants, and expenses are brought in from the individual supporting events. To view the summary page, on the main event page, click **View the summary for [selected event]** in the summary area of the main event page.



Events Summary

The Events tab in the summary view contains information about the event and supporting events. On the Events tab of the event summary page, you can add supporting events, edit events, and delete events.



For more information about how to add supporting events, refer toAdd an Event to the Hierarchy on page 76.

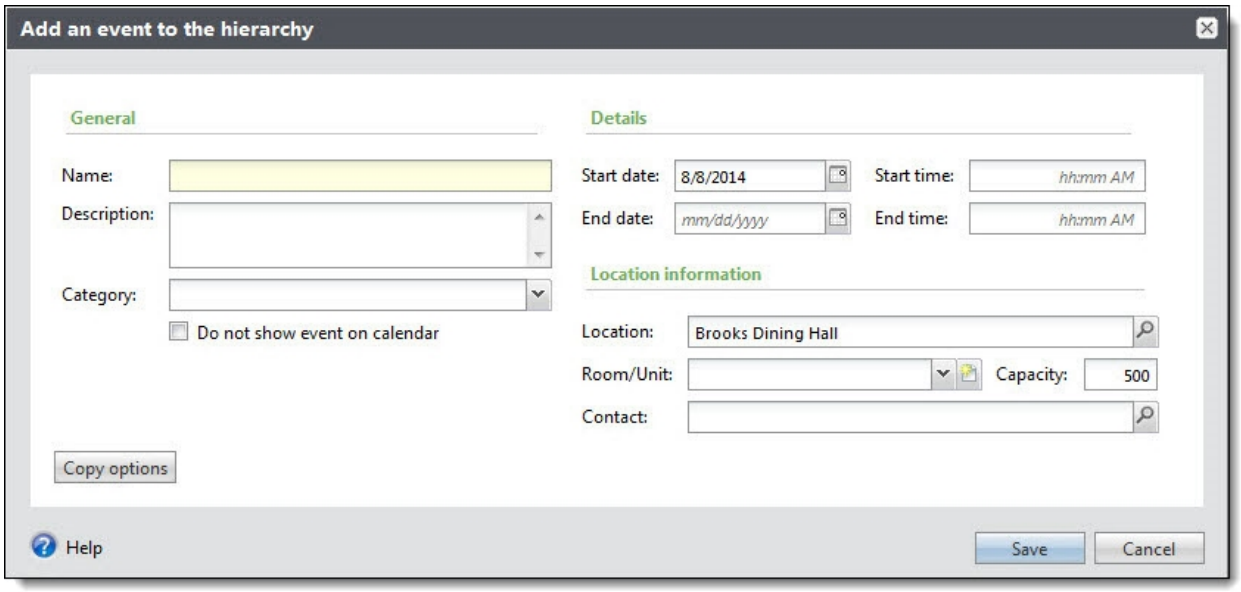
For more information about how to edit events, refer to Edit Events on page 41.

Add an Event to the Hierarchy

If your organization sponsors large events comprised of smaller events, you can add supporting events to a main event. For example, if you have an alumni weekend in May each year, you can designate "Alumni Weekend" as the main event and add supporting events such as "dinner" or "golf outing" to the main event.

Add an event to the hierarchy

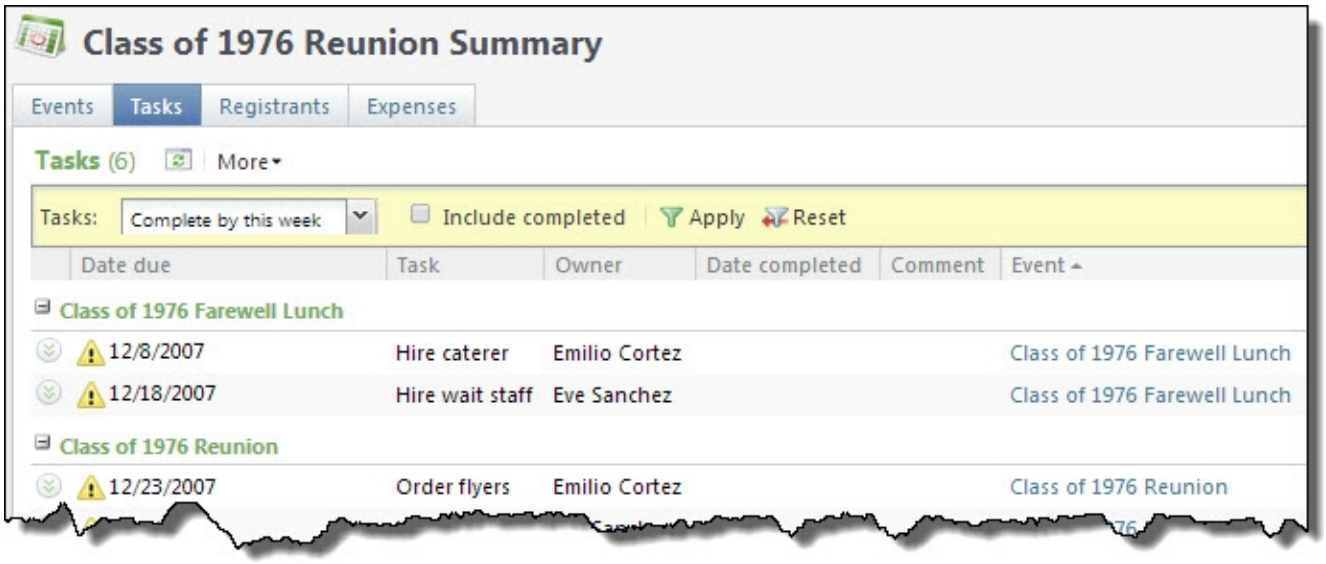
1. Open the event for which to add a supporting event.
2. Click **Add** on the action bar. The Add an event to the hiearchy screen appears.



3. Enter information in the fields. For more information about the items on this screen, refer to Add an Event Screen on page 30.
4. Click **Save**.

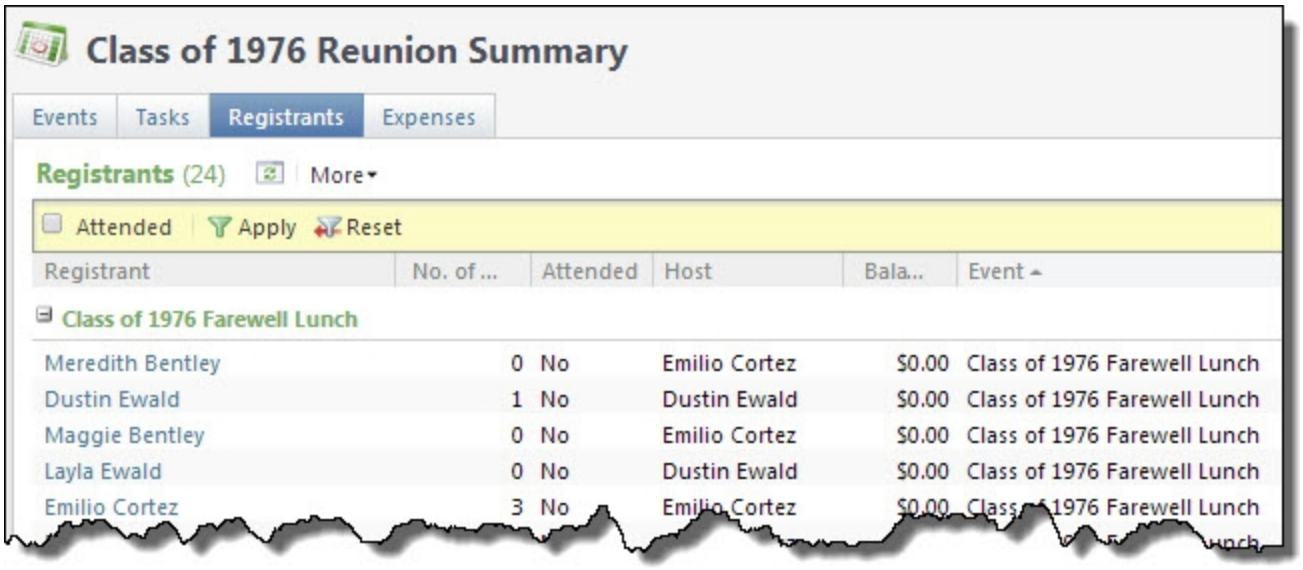
Tasks Summary

When you view an event summary, the Tasks/Coordinators tab displays tasks for all events associated with the main event. By default, in the **Tasks** grid, the tasks are listed by event. To sort the events, click the column by which to sort.



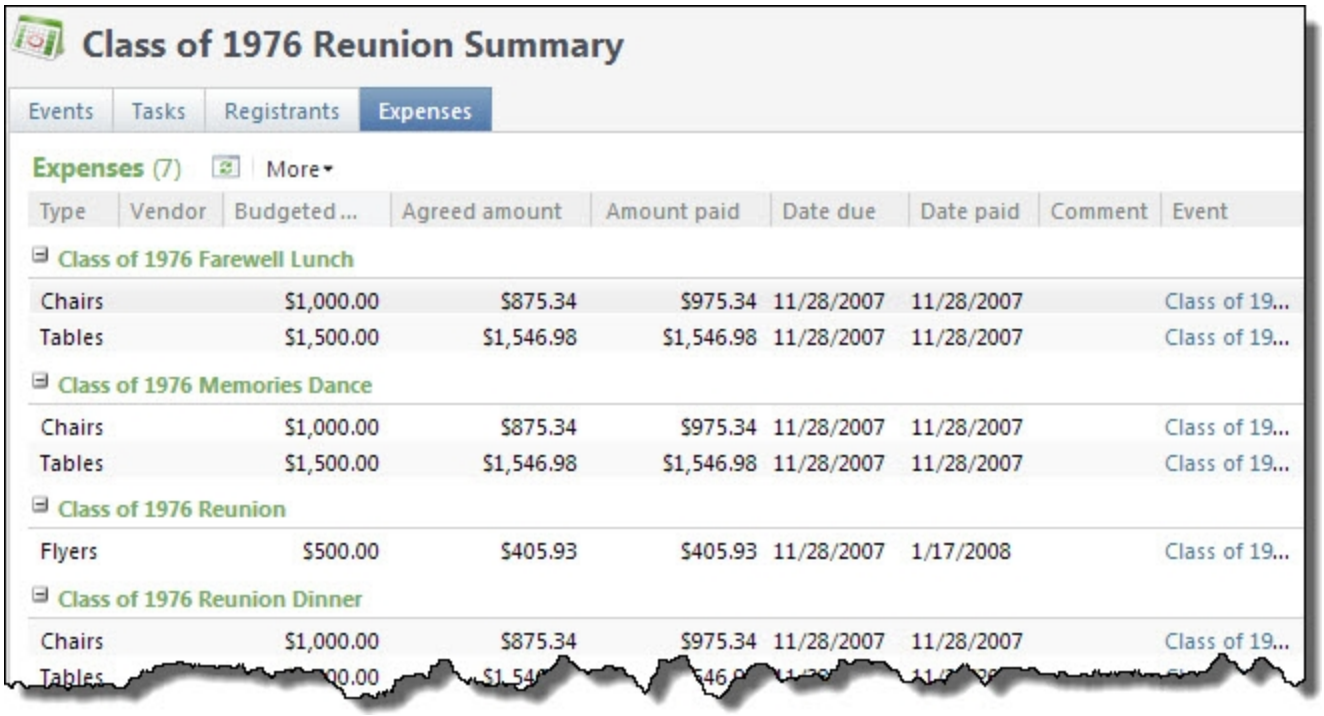
Registrants Summary

When you view an event summary, the Registrants tab displays registrants for all events associated with the main event. By default, in the **Registrants** grid, the registrants are listed by event. To sort the events, click the column by which to sort.



Expenses Summary

When you view an event summary, the Expenses tab displays expenses for all events associated with the main event. By default, in the **Expenses** grid, the expenses are listed by event. To sort the events, click the column by which to sort.

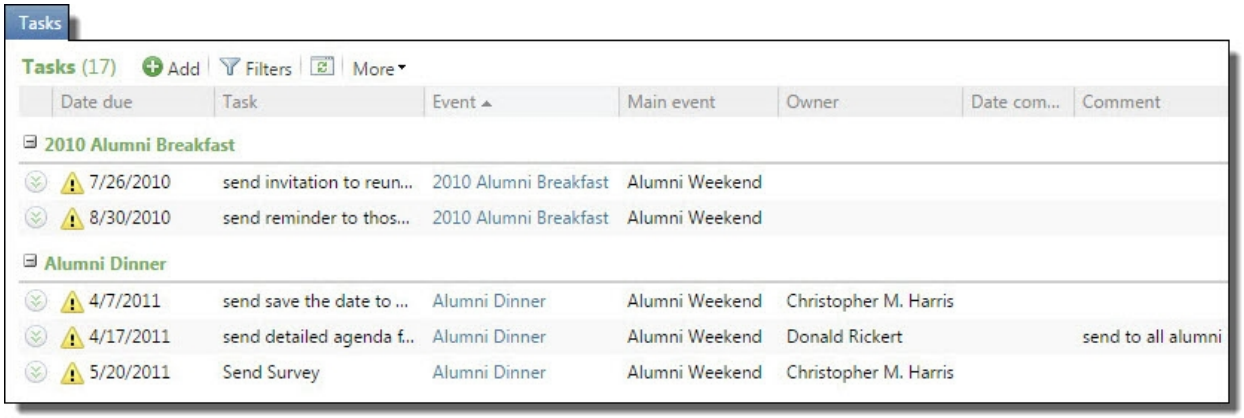


Events Overview Page

The Events Overview page, accessible from *Events*, displays all events and their associated tasks in a single view. On the Events Overview page, you can manage all your organization's events and tasks, or only those assigned to you. From the tabs, you can add, edit, and delete events or tasks, mark tasks complete, and go to specific events or tasks.

Tasks

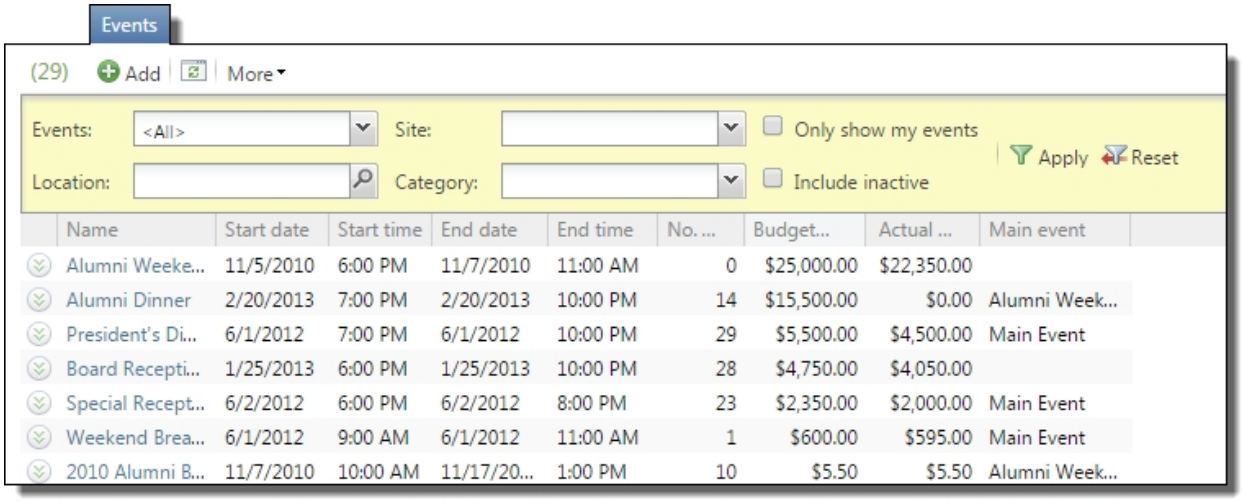
On the Events Overview page, the Tasks tab displays tasks for events. By default, tasks appear by event. To sort the events, click the column by which to sort. To display only those tasks assigned to you, select **Filters** and click **Only show my tasks**.



For information on tasks and events, refer to Manage Tasks on page 44.

Events

On the Event overview page, the Events tab displays all events. By default, under **Events**, events appear alphabetically. To sort the events, click the column by which to sort.



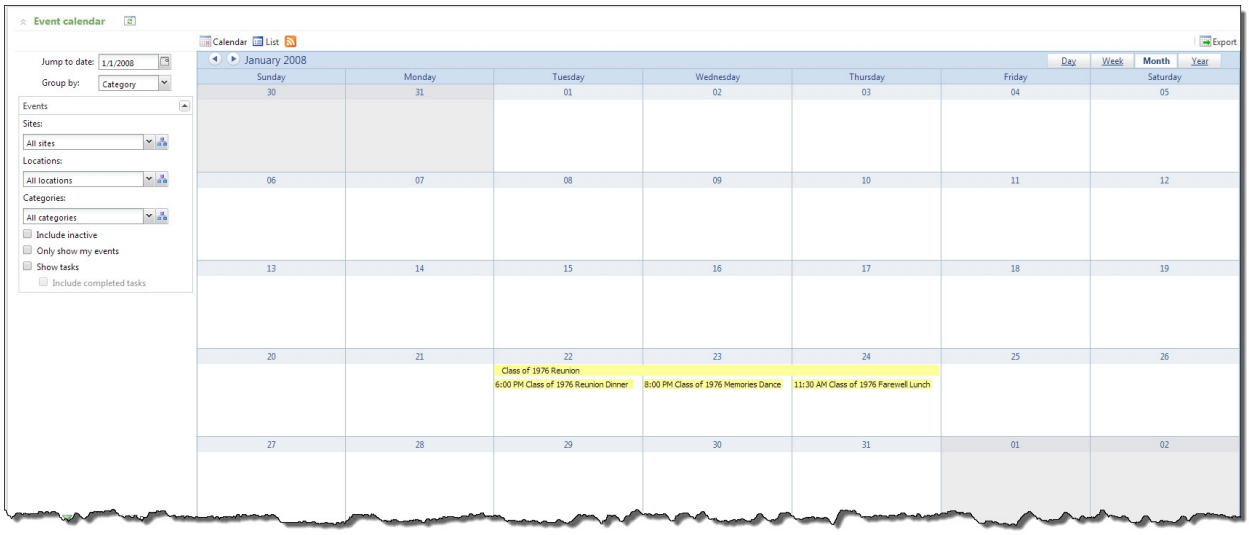
Name	Start date	Start time	End date	End time	No. ...	Budget...	Actual ...	Main event
Alumni Weeke...	11/5/2010	6:00 PM	11/7/2010	11:00 AM	0	$25,000.00	$22,350.00	
Alumni Dinner	2/20/2013	7:00 PM	2/20/2013	10:00 PM	14	$15,500.00	$0.00	Alumni Week...
President's Di...	6/1/2012	7:00 PM	6/1/2012	10:00 PM	29	$5,500.00	$4,500.00	Main Event
Board Recepti...	1/25/2013	6:00 PM	1/25/2013	10:00 PM	28	$4,750.00	$4,050.00	
Special Recept...	6/2/2012	6:00 PM	6/2/2012	8:00 PM	23	$2,350.00	$2,000.00	Main Event
Weekend Brea...	6/1/2012	9:00 AM	6/1/2012	11:00 AM	1	$600.00	$595.00	Main Event
2010 Alumni B...	11/7/2010	10:00 AM	11/17/20...	1:00 PM	10	$5.50	$5.50	Alumni Week...

For information about how to add and edit events, refer toAdd Events on page 28 and Edit Events on page 41.

Event Calendar

To view the event calendar, from an event record, click **View event calendar** under **More information** on the explorer bar. The event calendar displays events that occur within the selected date range. You can narrow the events displayed by month, week, day, site, category, or location. You can mark events to not be displayed on the event calendar.

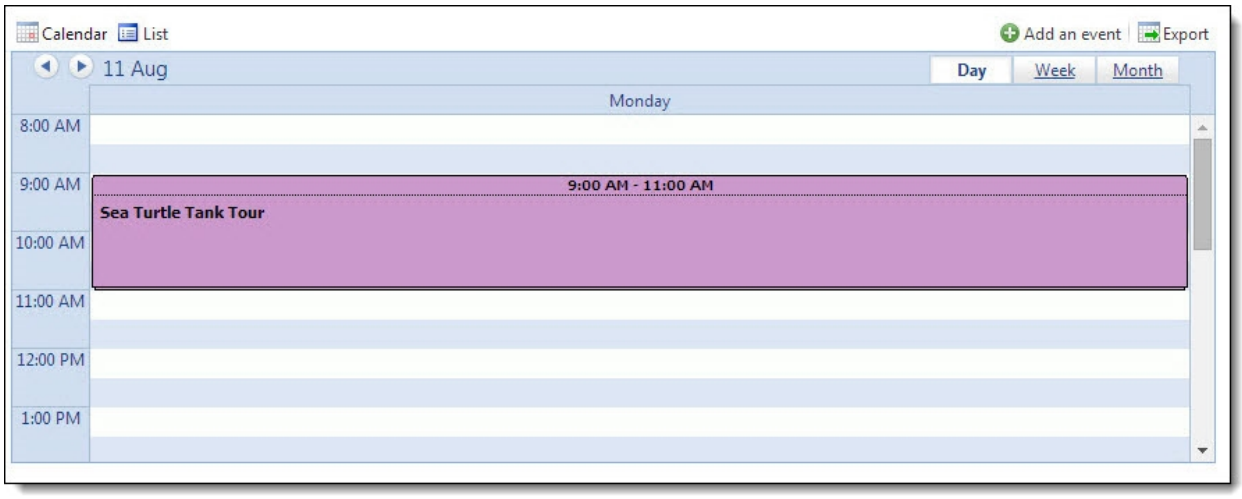
Note: An event coordinator can view all available events and tasks, but a task owner can view only those tasks and events assigned to him personally.



There are several steps you must take before you can schedule events. For more information about the event setup process, refer to Event Setup Checklist on page 25.

View Event Calendar by Day

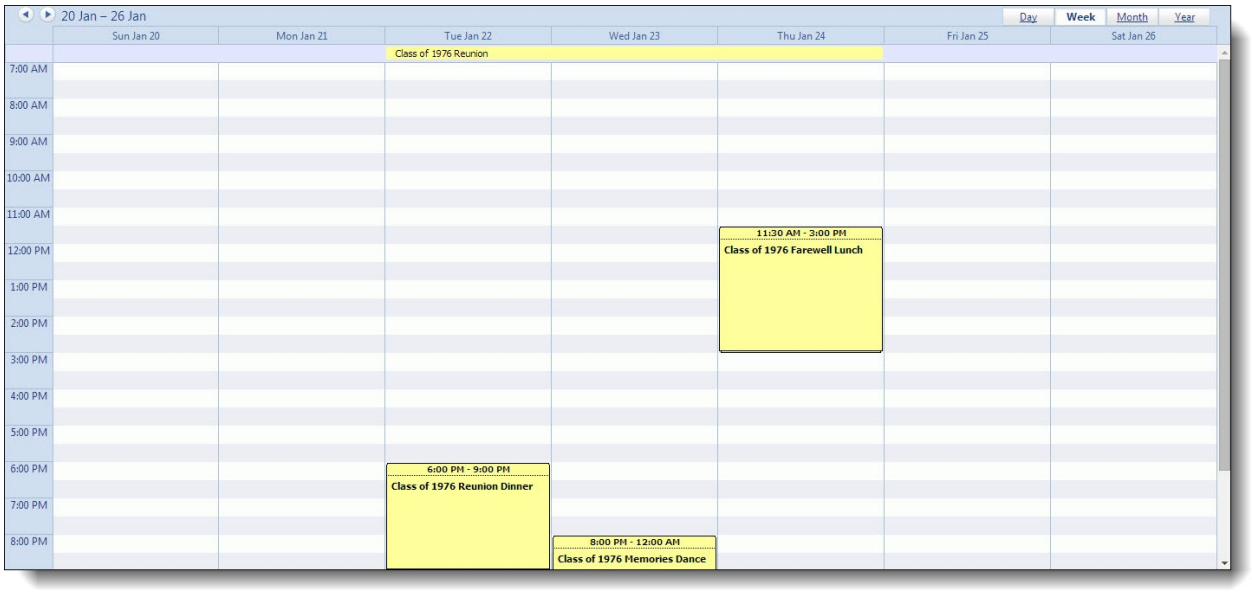
With the event calendar, you can select different views. You can view a detailed calendar for a specific day. The day view includes detailed information about events and tasks scheduled for that day. The day view is broken down by hours. To view the event calendar for a specific day, select the day and click **Day** at the top of the screen. The day view appears.



View Event Calendar by Week

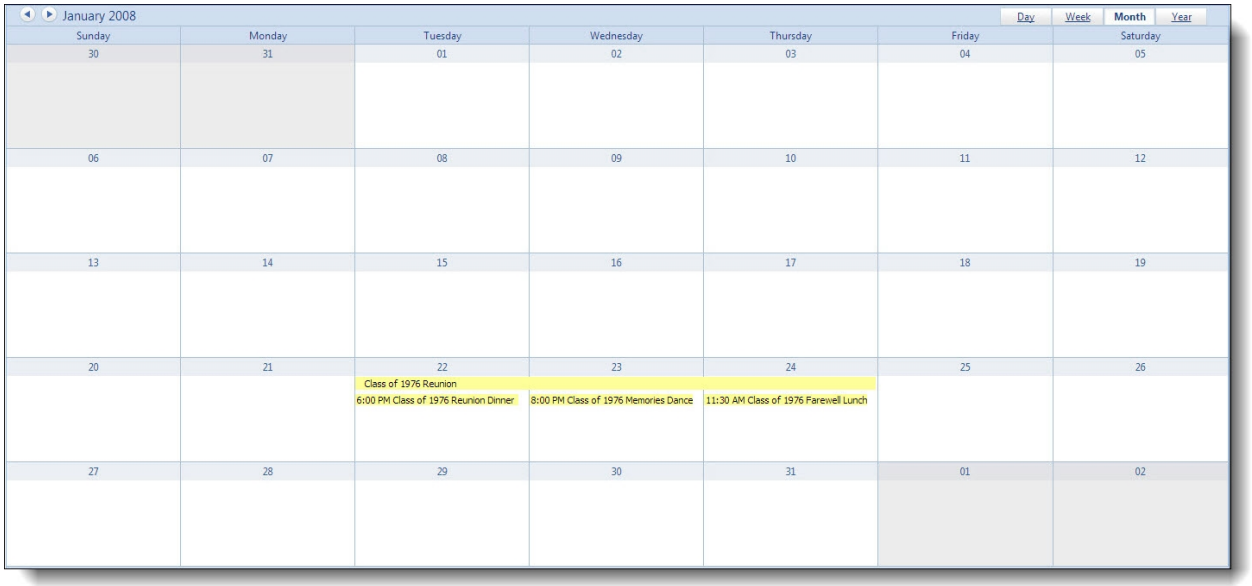
With the event calendar, you can select different views. You can view a detailed calendar for a specific week. The week view includes detailed information about events and tasks scheduled for that week.

The week view is broken down by days. To view the event calendar for a specific week, select a day in that week and click **Week** at the top of the screen. The week view appears.



View Event Calendar by Month

With the event calendar, you can select different views. You can view a detailed calendar for a specific month. The month view includes information about events and tasks scheduled for the entire month. The month view is broken down by weeks. To view the event calendar for a specific month, select a day in that month and click **Month** at the top of the screen. The month view appears.



Filter Calendar Events and Tasks

You can use the checkboxes at the top of the event calendar to determine which tasks and events appear. To include both completed and active events, mark **Include completed events**. To include both completed and active tasks, mark **Include completed tasks**. The event calendar automatically updates.

Note: An event coordinator can view all events and tasks, but a task owner can view only those tasks and events assigned to him personally.

Event Registration

Registrants and Guests **85**
Registrant Status Options **85**
Update All Registrants of an Event **86**
Add Registrants and Guests **87**
Edit Registrants and Guests **89**
Add Guest Registrants **90**
Edit Registrants **90**
Edit Registrant ID **91**
Add Registrants and Guests for Multiple Events **91**
Event Registrant Record **93**
Registrant Page Options **94**
Registrations Tab **94**
Registrant Benefits **95**
Edit Benefits for an Event Registrant **96**
Registrant Lodging and Travel **97**
Add Lodging Information for a Registrant **98**
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Registrant Restrictions **100**
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Edit Registrant Speaker Information **104**
Registrant Attributes **104**
Add Registrant Attributes **104**
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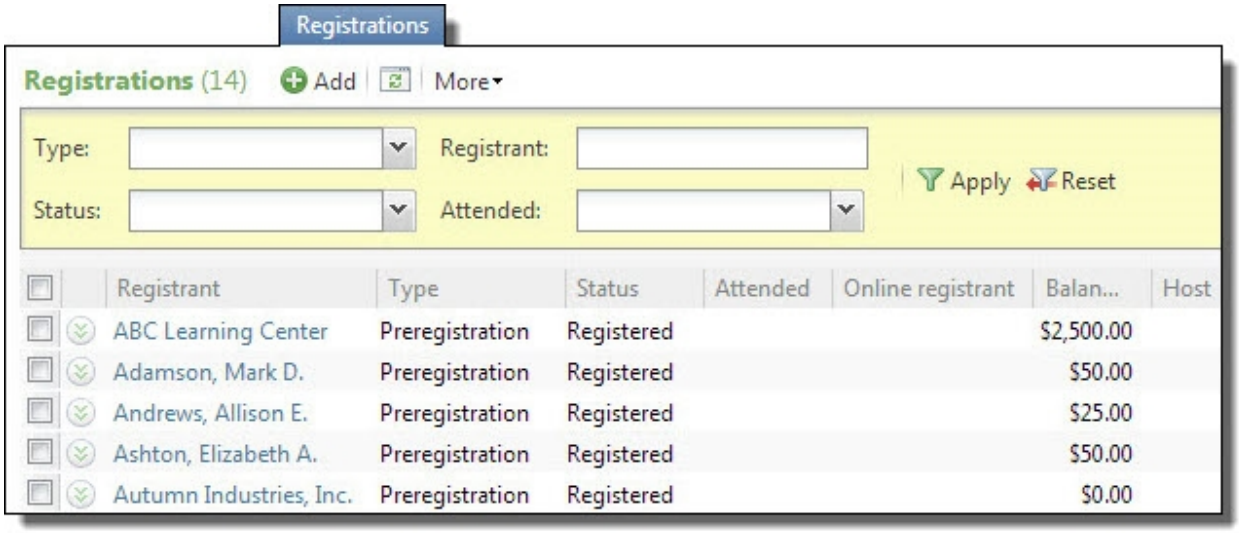
Registrant View **106**

With *Events*, you can manage registrants and registrations for each event. On the Registrations tab of an event page, you can add registrants. When you register a constituent for an event, you record the registration options the constituent selects. Once you add a registrant, you can then add registrations, guest registrants, and registrant attributes for the registrant. You can also record the registrant's attendance status for the event.

Registrants and Guests

On the Registrations tab of an event record, you can view and manage information about registrants and their guests.



Under **Registrations**, you can view the registration fee balance for each registrant and identify who registered online. You can also check attendance status and review who has a conflict with another event. To view additional information about a registrant, select the registrant name in the grid. The record of the registrant appears. For information about the items on this record, refer to Event Registrant Record on page 93.

Tip: Additional information does not display for unregistered invited guests.

Note: Conflicts occur only between sub-events of a main event, such as two receptions on the same night during an alumni weekend.

When you create and send an invitation from the event Invitations tab the invitee displays on the Registrations tab: **Type** = "Invitation" and **Status** = "No reply."

As the registrant list increases over time, it may be difficult to find a specific registrant. To narrow the list, you can filter the grid by registrant, registrant status, if the registrant attended, or event type such as Invitation or Walk-in. Select the criteria of the registrants to view and click **Apply**. To remove the filter and view all registrants in the grid, click **Reset**.

Registrant Status Options

From the event registrant record, you can mark the status of a registrant, such as to indicate whether he or she cancels or attends the event.

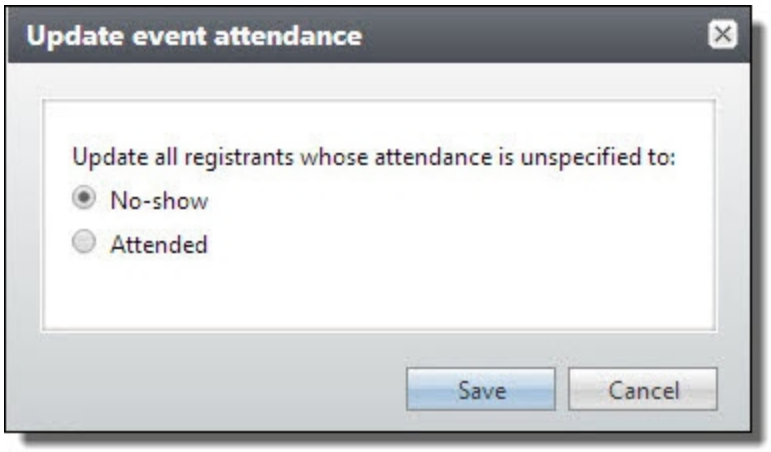
Screen Item	Description
Will not attend	When a registrant informs you that he or she cannot attend an event, select this option. To do this, select the registrant and click **Mark as, Will not attend**. In the grid, the **Status** column displays Will not attend for the selected registrant.
Will attend	When a registrant informs you that he or she will attend an event, select this option. To do this, select the registrant and click **Mark as, Will attend**.
No-show	When a registrant informs you he or she will atend an event, but then does not show up without notifying you, select this option. To do this, select the registrant and click **Mark as, No-show**. In the grid, the **Attended** column displays No show for the selected registrant
Attended	After an event, you can indicate which registrants attended the event. To mark a registrant as attended, select the registrant in the grid and click **Mark as, Attended**. In the grid, the **Attended** column displays Yes for the selected registrant.
Register for event	If the constituent accepts an invitation to an event and wants to register for the event, click the **Register** button. The Add registrant screen appears.
Mark as not declined	If you mark an invited registrant as declined and you later need to change the status back to No reply, select **Mark as not declined**. In the grid, the **Status** column displays "No reply" for the selected registrant and the **Register** button is activated, allowing you to register the constituent for the event.
Mark as not attended	After an event, if you mark a registrant as attended when he or she did not actually attend the event, you can indicate that the registrant did not attend the event. Select the registrant and click **Mark**, **Mark as not attended**.

Update All Registrants of an Event

When you want to update the attendance of all registrants with open attendance statuses after an event is over, you can use the **Update event attendance** task. For example, you may want to designate all registrants with an open status as "No-show."

Update all unspecified registrant attendance statuses

1. From the event record, under **Tasks**, click **Update event attendance**. The Update event attendance screen appears.



2. Select to change all unspecified registrant attendance statuses to **No-show** or **Attended**.
3. To complete the update and click **Save**. Any registrant in the **Registrations** grid without a status assigned in the **Attended** column now displays your selected attendance status.

Add Registrants and Guests

Registrants are the event attendees, players, coordinators, instructors, vendors, and other businesses that supply a service or product for the event, or any other person involved with the event. You can use the Registrations tab of an event page to add registrants and registrant guests.

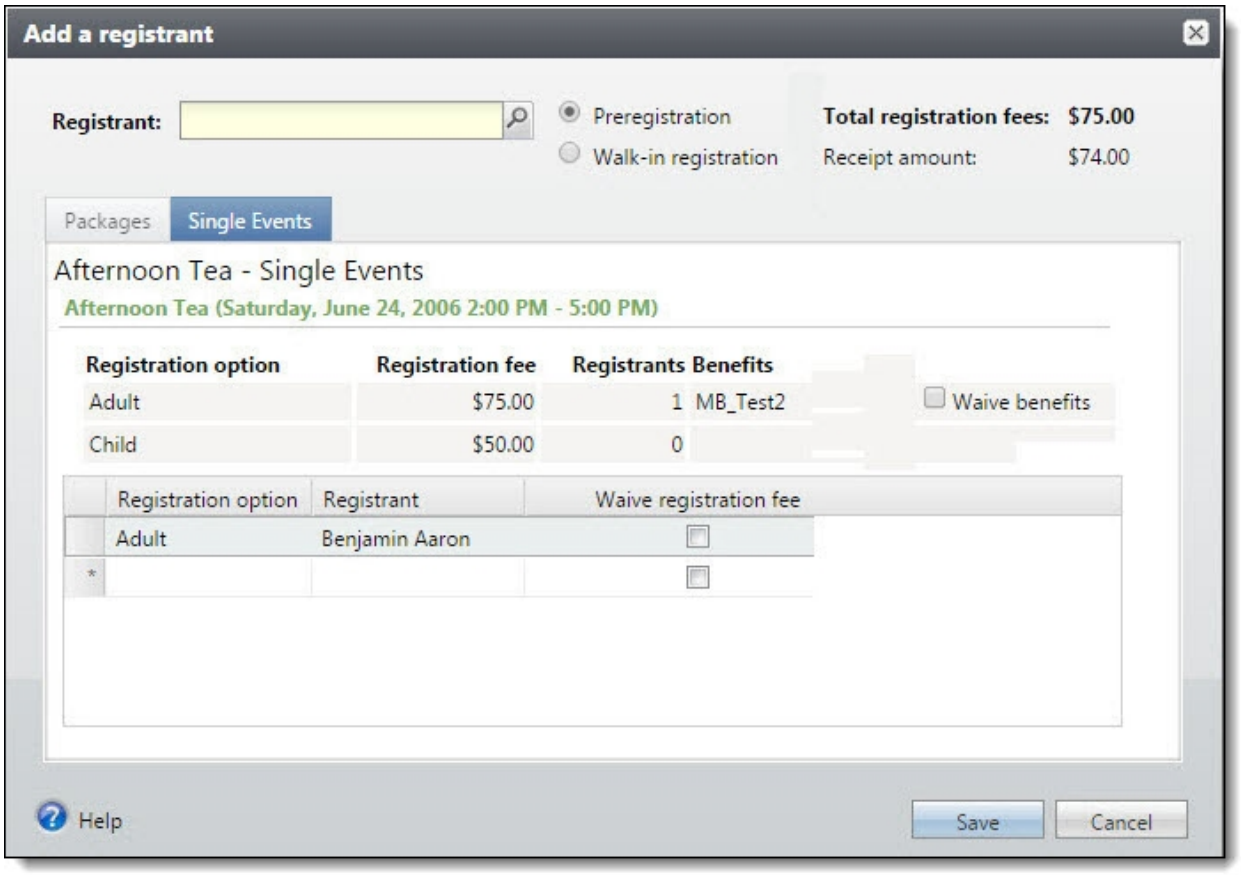
Note: When you add or edit registrants and guests for multiple associated events that have registration packages, such as a reunion weekend, refer toAdd Registrants and Guests for Multiple Events on page 91.

Add a registrant for a single event

1. On the event page, select the Registrations tab.

   Note: You can add registrants for events from **Advance sales** and **Daily sales**. Also, from **Advance sales** you can create and accept payments for past events.

2. Click **Add**. The Add a registrant screen appears.

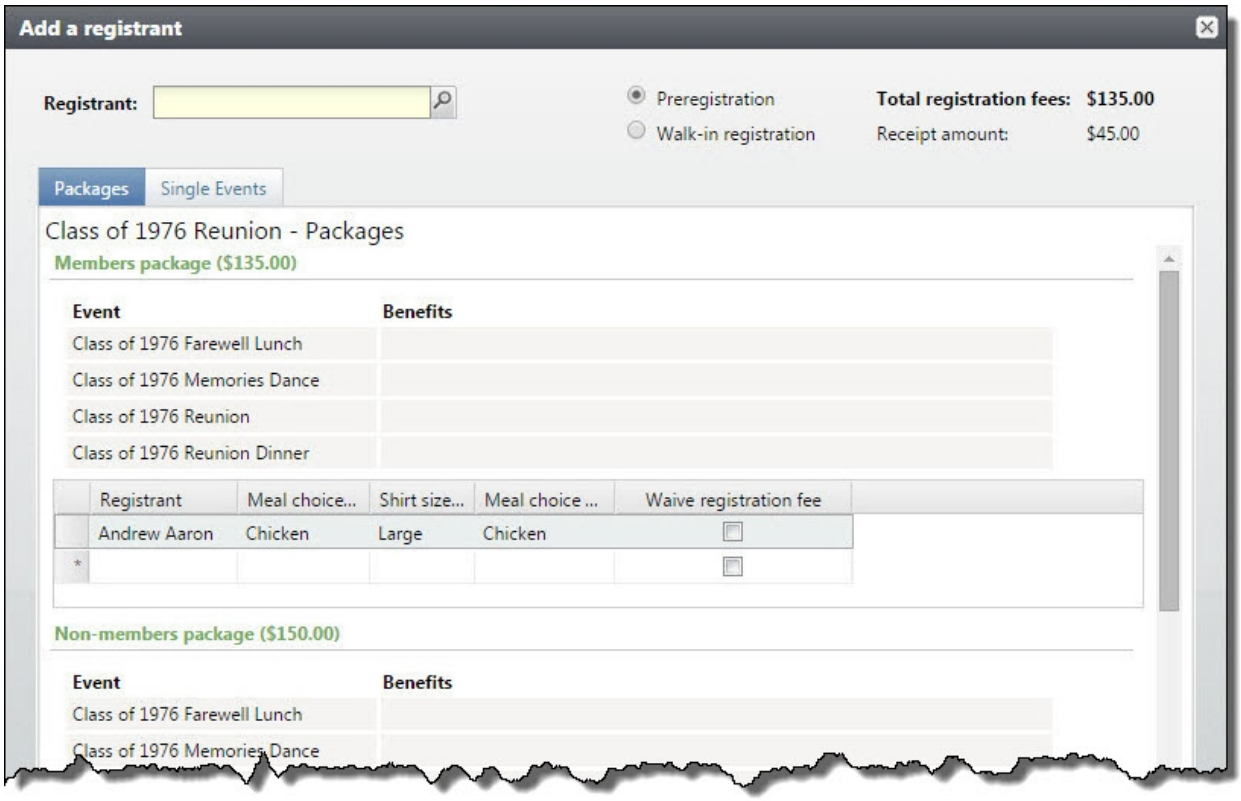


3. In the **Registrant** field, select the constituent to register for the event. The Single Events tab displays the registration options available for the event.

Note: If notifications exist for the constituent record, a **View notifications** indicator appears next to the registrant or guest name. Notifications may include the constituent's event preferences for meals, seating, or other special requirements.

4. Next to the **Registrant** field, select whether the registrant pre-registered for an event or walked in to register for the event at the time it occurred.
5. In the **Registration option** column, select the predefined option your organization uses, such as "Adult," "Child," or "Couple."

   For more information about setting up event options and preferences, refer to Event and Registration Options on page 55.
6. To waive the registration fee, select **Waive registration fee**.
7. When the event consists of multiple events, the Packages tab appears.



8. Under the appropriate package select a registrant in the **Registrant** column. To search for a registrant, click the magnifying glass.
9. To save the registrant, along with any guest or preference information, click **Save**.

Edit Registrants and Guests

After you add a registrant for an event, you can change the information about that registration, including guests or event preferences. However, you cannot change the constituent who is listed as the primary registrant.

Note: When you add or edit registrants and guests for multiple associated events with registration packages, such as a reunion weekend, refer to Add Registrants and Guests for Multiple Events on page 91.

Edit a registrant or guest

1. Access the event for which to edit the registration.
2. On the Registrations tab of an event, click the down arrow next to the registration to edit.
3. Click **Edit**, **Edit registrations**. The Edit registrant screen appears.
4. On the Event tab, edit the number of registrations for the constituent for each registration option type.

5. Click the arrow next to the quantity to display registrant and guest information, as well as any event preferences. The fields vary based on the registration options and preferences for the event. You can also select the checkbox to waive the event registration fee. For more information about setting up event options and preferences, refer to Event and Registration Options on page 55.

Note: When there are notifications exist for the constituent record, a **View notifications** indicator appears next to the registrant or guest name. Notifications may include the constituent's event preferences for meals, seating, or other special requirements.

6. To view a summary of registration information on the Events tab, select the Summary tab.
7. To save the registrant, along with any guest or preference information, click **Save**.

Add Guest Registrants

You can use the Registrations tab of an event page to add registrants and their guests. If a registrant includes the name of a guest with the registration, you can enter the guest as a constituent in your database.

You can add guests when you first add the primary registrant. For more information, refer to Add Registrants and Guests on page 87.

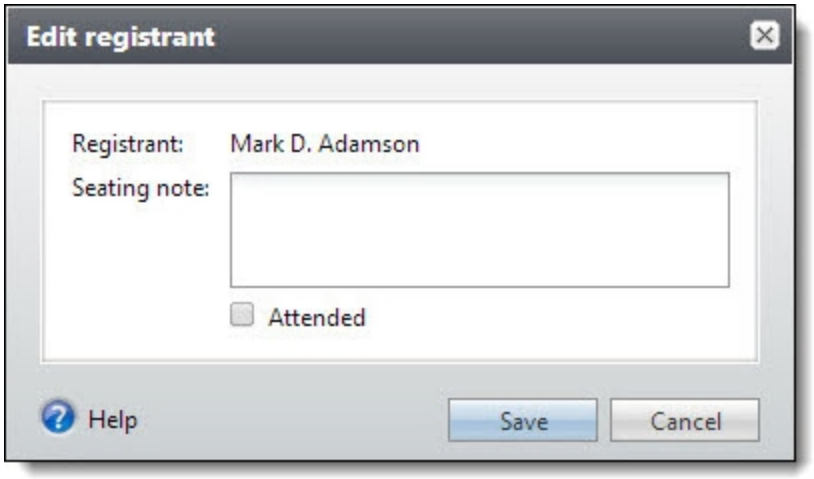
If a registrant has unknown guests, you can edit the registration later to add guest and preference information. For more information, refer toEdit Registrants and Guests on page 89.

Edit Registrants

After you add a registrant, you can edit details for that registrant. On the Registrations tab of the event page, in the **Registrants** grid, you can select a registrant to edit.

Edit a registrant

1. On the Registrations tab of an event record, select the registrant under **Registrants** and click **Edit**, **Edit registrant**. The Edit registrant screen appears.



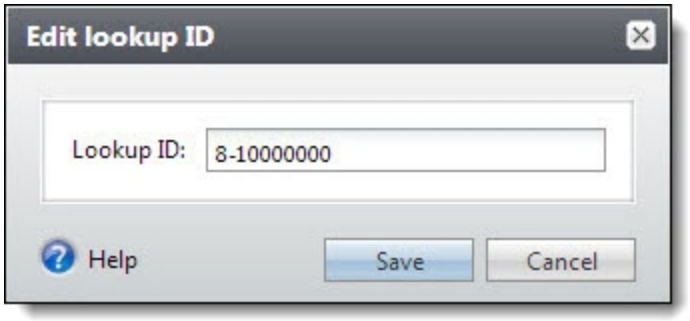
2. Update the registrant or seating note information as necessary. You can also mark that the registrant has attended the event. For more information about editing the registration details, refer to Edit Registrants and Guests on page 89.
3. To return to the Registrations tab, click **Save**.

Edit Registrant ID

When you add an event registrant, the program automatically generates a unique registrant ID. After you add a registrant, you can edit the registrant ID if necessary, such as to use an ID from a previous system.

Edit a registrant ID

1. On the Registrations tab of an event record, select the registrant under **Registrants**. The Event registrant page appears.
2. Under **Tasks**, click **Edit registrant ID**. The Edit registrant ID screen appears.



3. Edit the ID as necessary.
4. To return to the Event registrant page, click **Save**. In the summary view at the top of the screen, the registrant ID updates.

Tip: When you enter payment information through *Import* or *Batch*, you can use event registrant IDs to automatically match payments to event registrations.

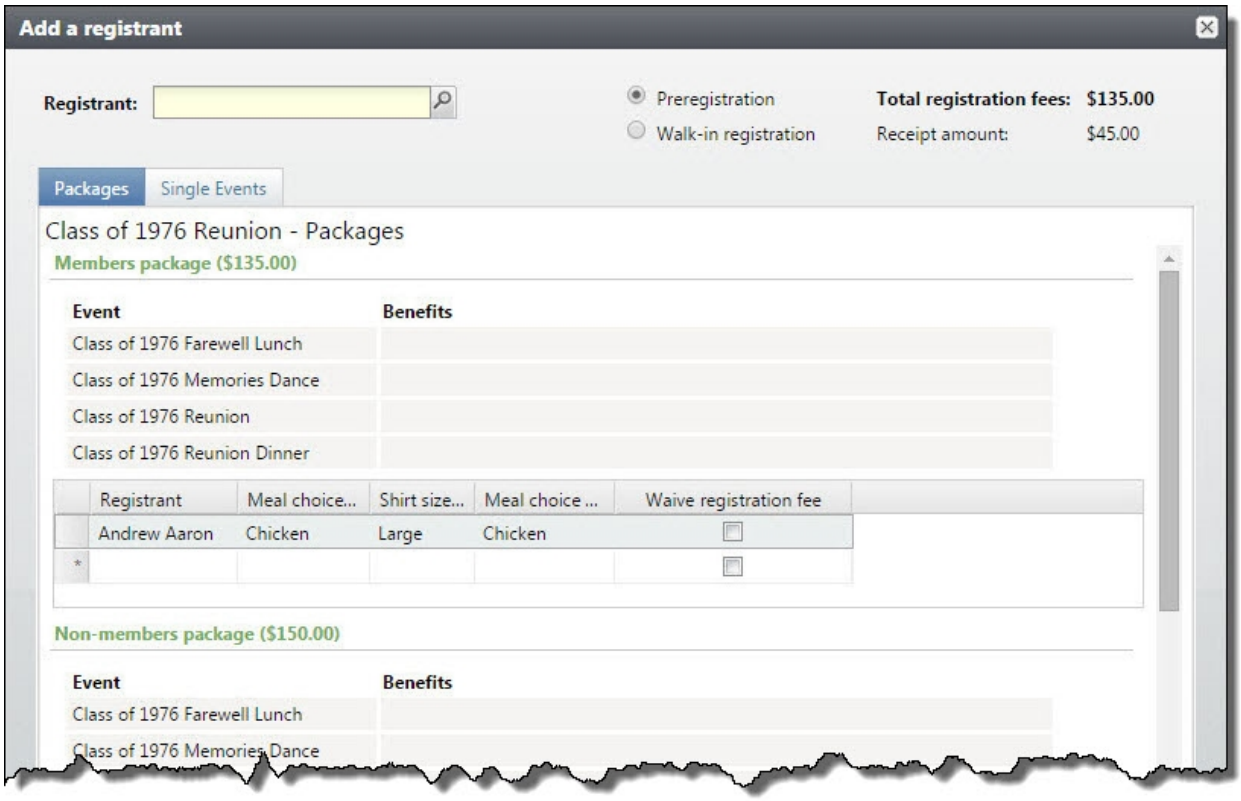
Add Registrants and Guests for Multiple Events

For main events with supporting events, the program provides a special type of registration. Registrants may choose to register for a package or individual events. A registration package is a combination of registration options from several supporting events. With a registration package, you can register a constituent for multiple events at once. Other registrants may choose to register for a combination of packages and individual events for themselves and their guests. With this registration, a registrant can select any combination of registration types available for the selected event and its sub events.

Add a registrant for multiple events

1. Access the main event for which to add registrations.
2. On the Registrations tab of the main event record, click **Add** on the action bar. The Add a registrant screen appears.

   The main event must have other supporting events in order to register individuals for multiple events.
3. Select the Packages tab.

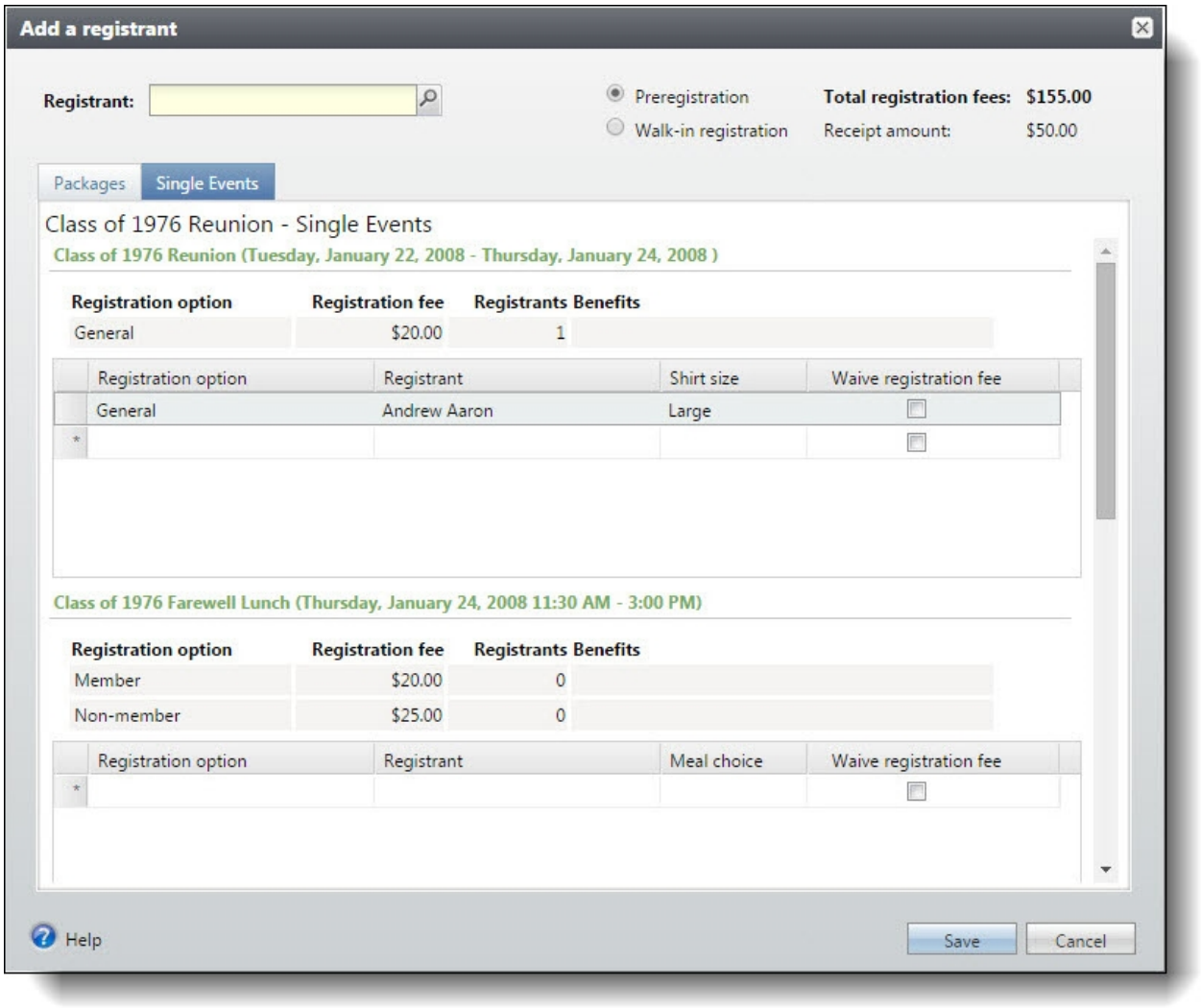


Note: To register the constituent for selected individual events only and not the complete package of events, select the Single events tab.

4. Enter the necessary information to register a constituent and any guests for multiple events. The fields vary based on the registration options and preferences for each event. You can also select the checkbox to waive the event registration fee.

Note: If notifications associated exist for a constituent record, a **View notifications** indicator appears next to the registrant or guest name. Notifications may include the constituent's event preferences for meals, seating, or other special requirements.

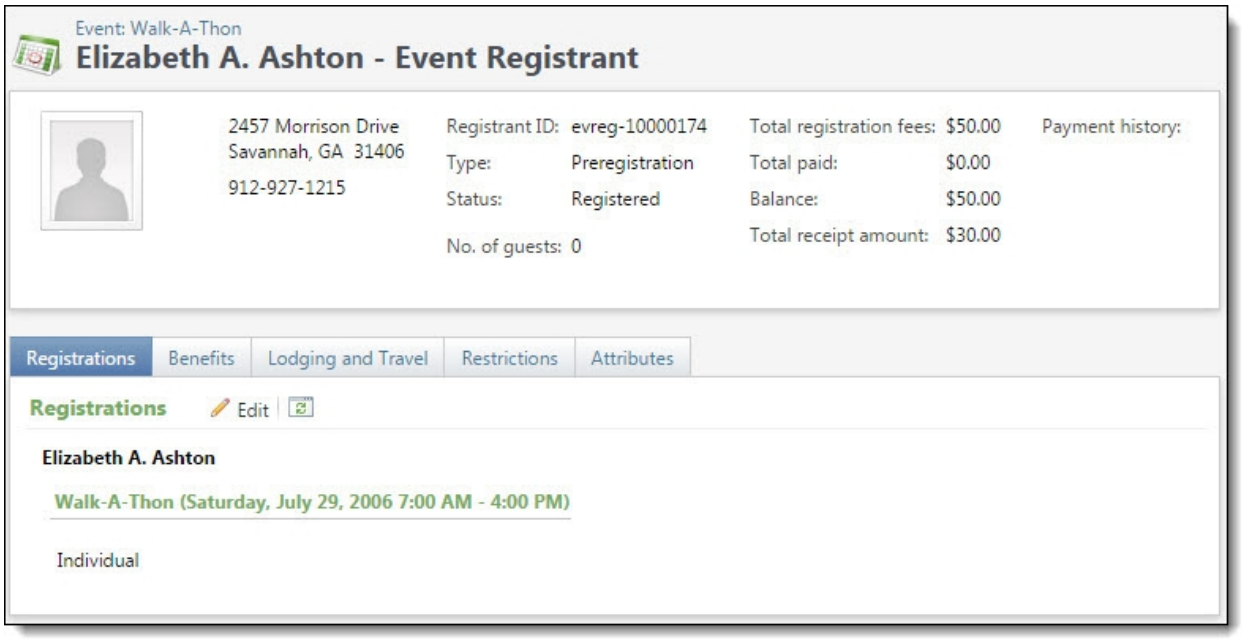
5. Select the Single events tab. Enter the necessary information to register the constituent for single events only and not all the events associated with the packages on the Packages tab.



6. Enter the number of registrations for the constituent for each individual event.
7. After you enter the quantity, click the arrow next to it to display registrant and guest information, as well as any event preferences. The fields that appear vary based on the registration options and preferences for each event. You can also select the checkbox to waive the event registration fee.
8. To return to the Single events tab, click **Save**.

Event Registrant Record

The event registrant record displays information about guests, registrations, and preferences for the selected registrant. You can add, edit, and delete information from this tab.



Registrant Page Options

From the registrant page, you can mark the status of a registrant to indicate whether he or she cancels or attends the event.

Screen Item	Description
Mark as will not attend	When a registrant informs you that he or she cannot attend an event, select this option. To do this, select the registrant in the grid and click **Mark as will not attend** under **Tasks** on the explorer bar.
Mark as will attend	When a registrant informs you that he or she will attend an event, select this option. To do this, select the registrant in the grid and click **Mark as will attend** under **Tasks** on the explorer bar.
Mark as attended	After an event ends, you can update registrants to indicate they attended the event. To mark a registrant as attended, select the registrant in the grid and click **Mark as attended** under **Tasks** on the explorer bar.

For more information about how to add registrants, refer to Add Registrants and Guests on page 87.

For more information about how to edit registrants and guest registrants, refer toEdit Registrants and Guests on page 89.

Registrations Tab

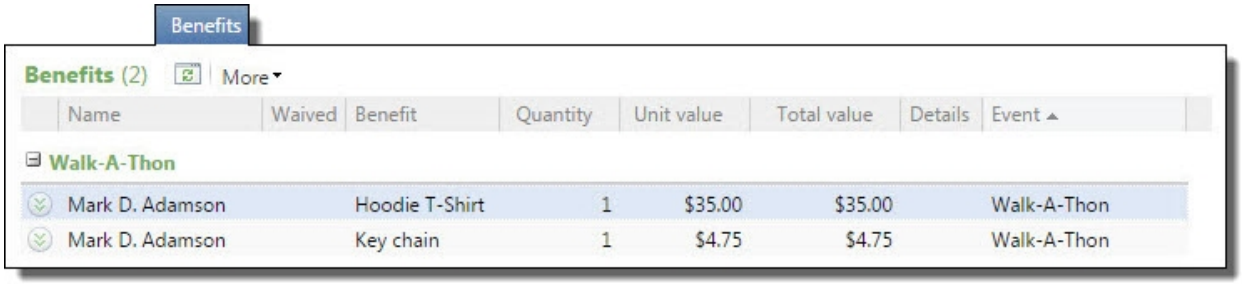
The Registrations tab contains information about the registration options for the registrant. On this tab, you can add, edit and delete registrations and guest information in addition to event preferences.

For an event with supporting events, such as a reunion weekend, some events may occur at the same time. When you register a constituent for a single events that occur at the same time or overlap, a warning icon appears next to the events that conflict. The tab displays the dates and times of each event so you can identify the conflict and determine whether it is a mistake with the registration.

For more information about how to add guests or edit registrations, refer to Edit Registrants and Guests on page 89.

Registrant Benefits

Benefits are gifts your organization gives to registrants for their participation in an event. For example, when a constituent registers for an event, you may send a free shirt as a thank you gift for participation. Although a benefit's value cannot credit registration fees for a registrant, the value may account for a difference between the registration amount and the receipt amount for tax purposes.To view the information about the benefits a constituent receives for an event registration, open the registrant page and select the Benefits tab.



Under **Benefits**, the applicable benefits for the registrant appear. For each benefit, you can view its quantity and value. You can also view whether the registrant selected to waive the benefits.

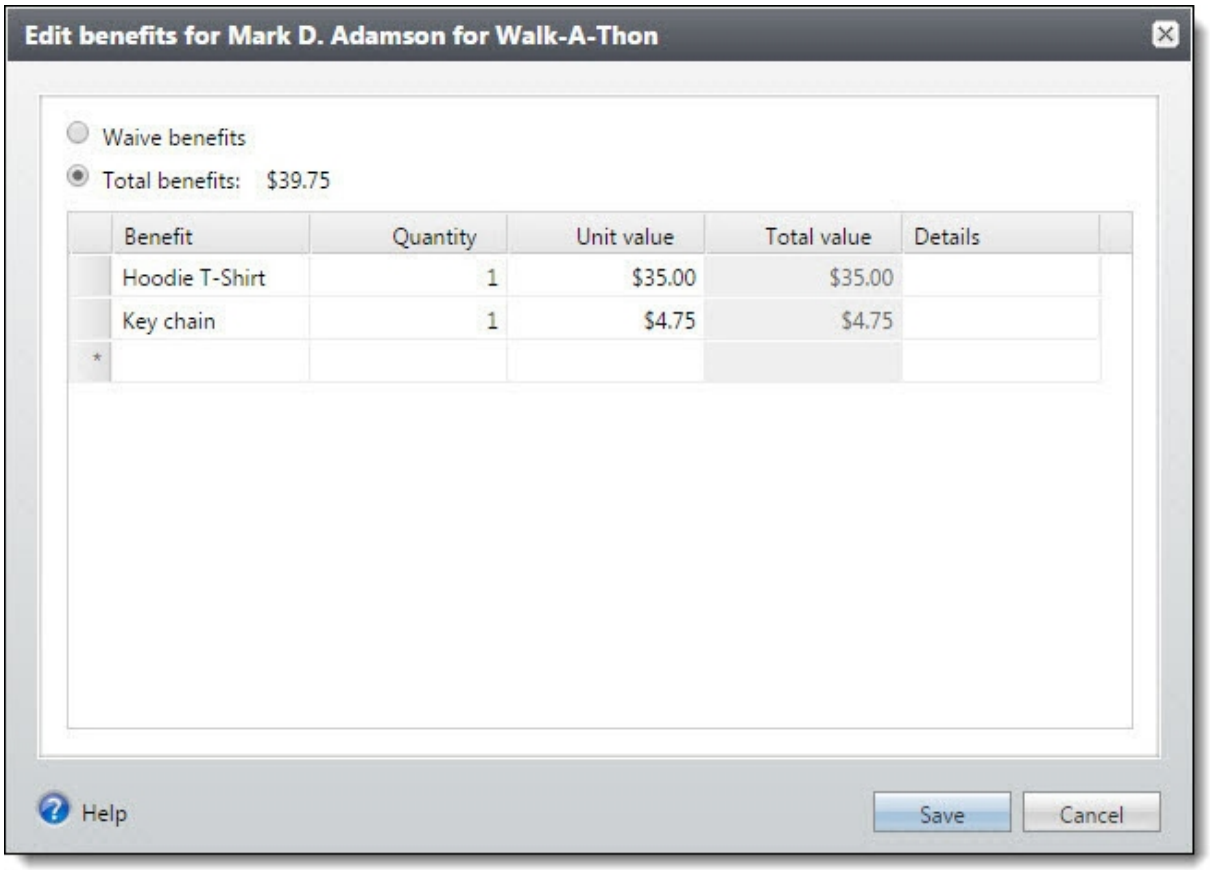
Depending on your security rights and system role, you can manage the benefits a registrant receives. For information, refer to Edit Benefits for an Event Registrant on page 96.

Edit Benefits for an Event Registrant

From a registrant record, you can manage the benefits the registrant receives or is eligible for, such as a thank-you gift for participation in the event.

Edit benefits for a registrant

1. On the event registrant record, select the Benefits tab and click **Edit benefits**. The Edit benefits screen appears. For information about the items on this screen, refer to Edit Benefits Screen on page 97.



2. Select whether the registrant receives benefits for the registration.
   - If the registrant elects to waive the benefits associated with the registration, select **Waive benefits**.

Note: The option to waive benefits for Friends Asking Friends events includes registration and incentive benefits.

- If the registrant elects to receive benefits for the registration, select **Total benefits**. In the grid, select the benefits the registrant receives. For each benefit, enter the quantity and edit the unit value or detail information as necessary.

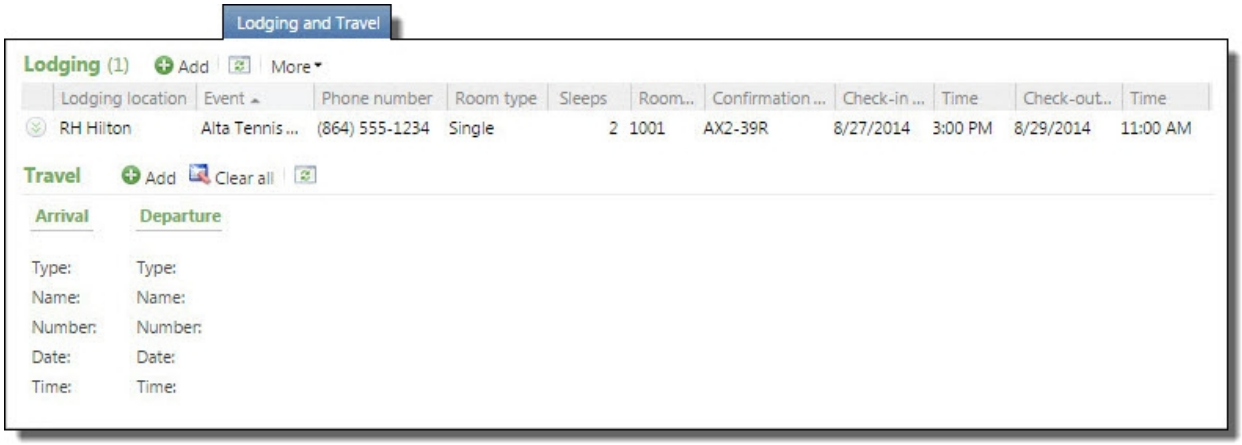
3. Click **Save**. You return to the Benefits tab.

Edit Benefits Screen

Screen Item	Description
Waive benefits	If the registrant elects to waive all benefits associated with the event, select this option.
Total benefits	If the registrant elects to receive benefits for the registration, select this option. The total value amount of the benefits received appears.
Benefit	If you select **Total benefits**, search for and select the benefits the registrant receives.
Quantity	Enter the quantity of each benefit the registrant receives.
Unit value	This column displays the monetary value of each benefit. Edit the unit value as necessary.
Total value	This column displays the total value of each benefit the registrant receives for the event, based on the quantity and unit value of the benefit.
Details	Enter any additional notes about each benefit. For example, for a t-shirt, enter its size or color.

Registrant Lodging and Travel

You may have registrants who travel to your event and require lodging facilities such as hotels or motels. To help accommodate your registrants, your organization may reserve a number of rooms for the event. Your organization may also provide on-site lodging accommodations for registrants and guests. As registrants make reservations at lodging locations associated with an event or schedule travel to your event, you can track information about a registrant's lodging and travel plans on the Lodging and Travel tab of the host registrant's record.



Under **Lodging**, you can manage and view the lodging location where the registrant plans to stay during the event. You can also view information such as the phone number where you can contact the registrant during the event or find the room and reservation information the registrant has at the lodging location.

Under **Travel**, you can view information about how the registrant travels to the event and arrival and departure information. From **Travel**, you can manage the travel information for the registrant.

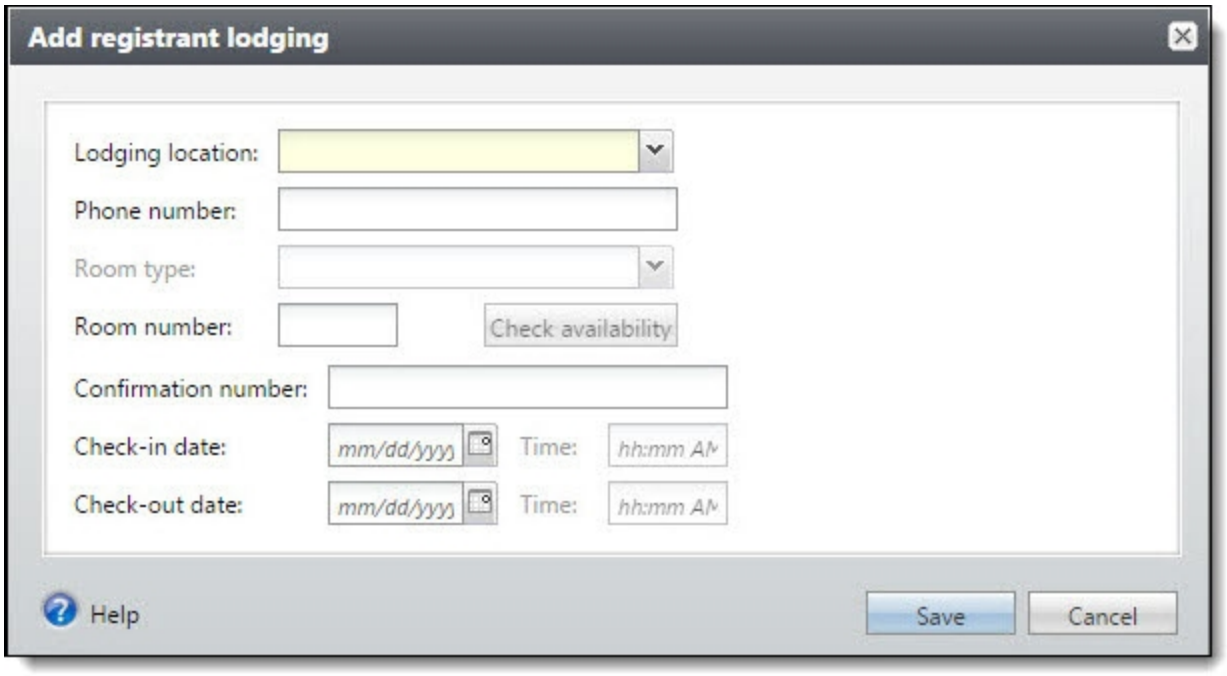
Add Lodging Information for a Registrant

You may have registrants who travel to your event from some distance and require lodging facilities such as hotels or motels. On the Lodging and Travel tab of a registrant record, you can track information about the registrant's accommodations during the event.

Before you can add lodging information for an event registrant, you must configure the lodging locations and room types available for registrants of the event. The program automatically uses the registrant's room option and number to calculate the number of available rooms that remain at each lodging option for the event. We recommend that the number of registrants assigned a room number at a lodging location not exceed the capacity of its room type. For information about event lodging options, refer to Lodging Options on page 70.

Add registrant lodging information

1. On the record of the event registrant, select the Lodging and Travel tab.
2. Under **Lodging**, click **Add**. The Add registrant lodging screen appears.

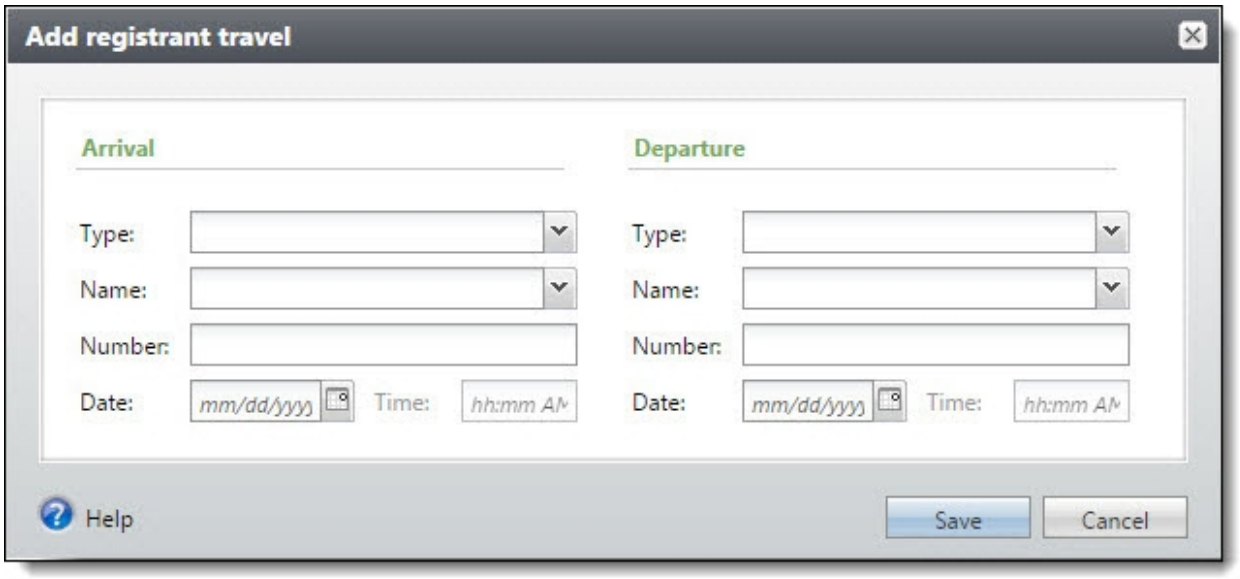


3. Select the lodging location where the registrant plans to stay for the event. You must configure a lodging location as a lodging option for the event. For information about event lodging options, refer to Lodging Options on page 70.

4. In the **Phone number** field, enter the phone number where your organization can contact the registrant during the event.
5. In the **Room option** field, select the type of room the registrant reserves at the location. This information determines the number of rooms that remain of each type at the lodging location.
6. In the **Room number** field, enter the number of rooms where the registrant stays at the location. To view the number of registrants already assigned the same room number, click **Check availability**.
7. Enter the confirmation number for the registrant's reservation at the location.
8. Enter the dates and times the registrant checks in and out of the lodging location.
9. To return to the Lodging and Travel tab, click **Save**.

Add registrant travel information

1. On the record of the event registrant, select the Lodging and Travel tab.
2. Under **Travel**, click **Add**. The Add registrant travel screen appears.



3. Under **Arrival** and **Departure**, enter information about how the registrant travels to and from the event.
   a. In the **Type** field, select the means of transportation, such as air or bus, the registrant uses for the event. Your system administrator configures the travel types available for this field.
   b. In the **Name** field, select the name of the travel carrier the registrant uses, such as Delta or Greyhound. Your system administrator configures the travel carriers available for this field.
   c. In the **Number** field, enter the vehicle number, such as the flight number or bus number.
   d. Enter the date and time of the registrant's arrival or departure.
4. To return to the Lodging and Travel tab, click **Save**.

Add Travel Information for a Registrant

You may have registrants who travel to your event from some distance. On the Lodging and Travel tab of a registrant record, you can track information about the registrant's travel arrangements for the event.

Clear All Registrant Travel Information

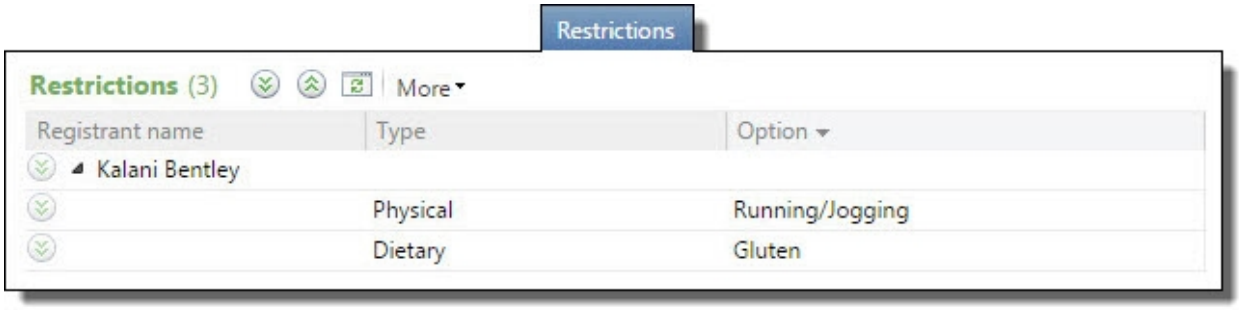
From the Lodging and Travel tab of a registrant record, you can delete all travel information for the registrant. Under **Travel**, click **Clear all**. When a message appears to ask whether to delete the travel information, click **Yes**.

After you clear the travel information, you can enter the new travel information as necessary.

Registrant Restrictions

Registrants may have dietary or physical restrictions, such as allergies or mobility restrictions. After you register constituents for an event, you can track restrictions on the Restrictions tab of a registrant record.

Note: You can also track event restrictions on the Personal tab of a constituent record. When constituent records specify restrictions, they automatically appear on the Restrictions tab of the registrant record. On the Restrictions tab, you can update the restrictions added on the constituent record.

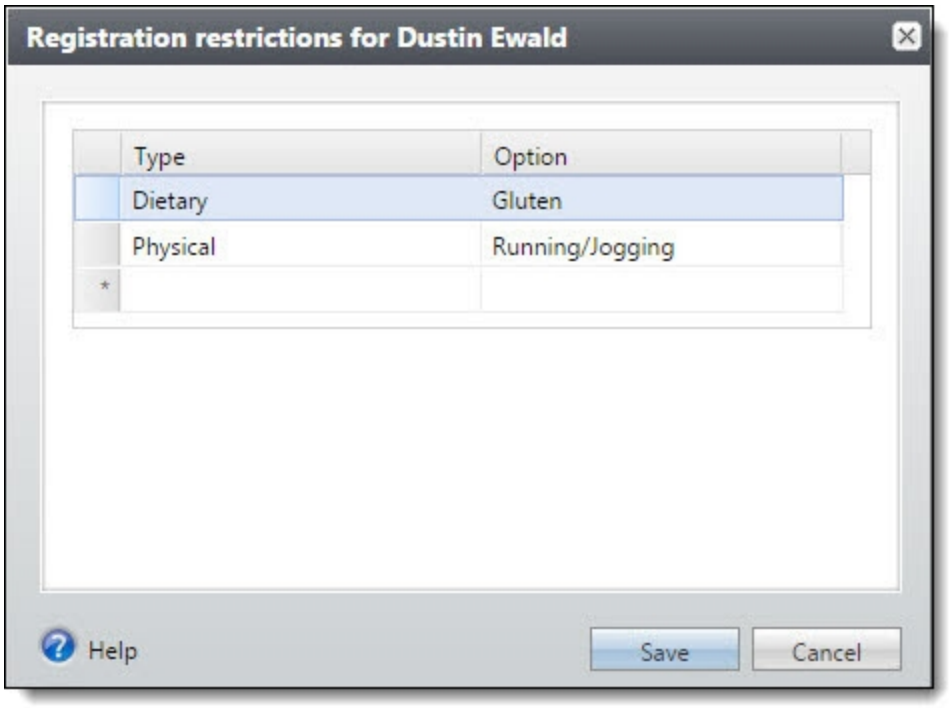


Edit Registrant Restrictions

Registrants may have dietary or physical restrictions, such as allergies or mobility restrictions. On the Restrictions tab of a registrant record, you can maintain restrictions for the registrant.

Edit registration restrictions

1. On the record of the event registrant, select the Restrictions tab.
2. Select the restriction to edit and click **Edit registration restrictions**. The Registration restrictions screen appears.



3. Select the necessary restriction types and options.

Note: If the restriction type or option does not appear, you must configure a new one. For information about how to configure restriction types or options, refer to Event Restriction Types on page 19.

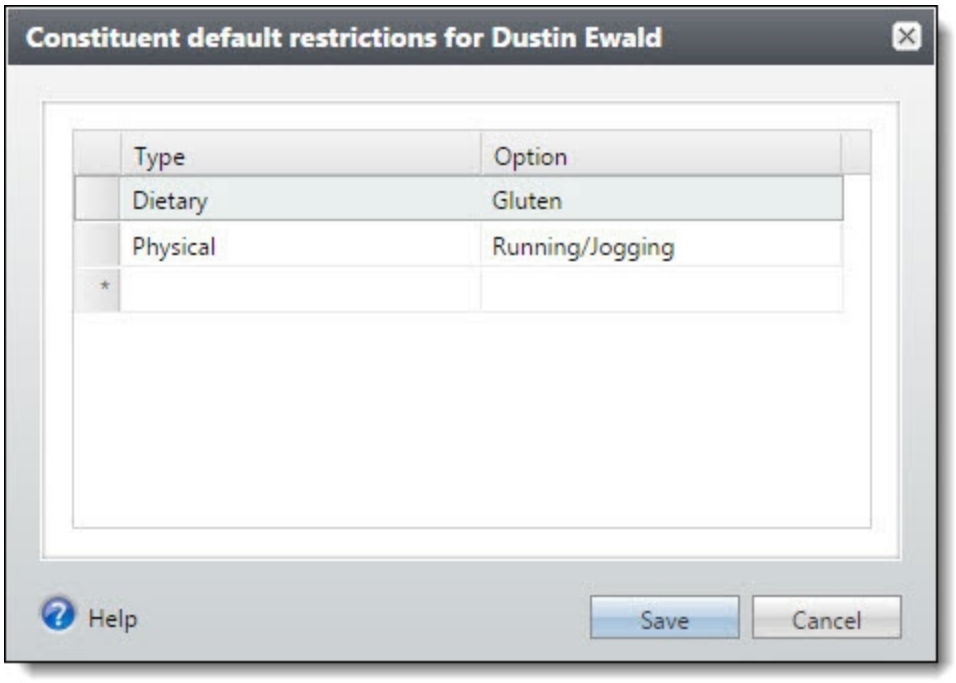
4. To return to the Restrictions tab, click **Save**.

Edit Constituent Default Restrictions

When event restrictions are set on a constituent record, they appear on the Restrictions tab of a registrant record. You can edit restrictions, such as for a recent physical injury.

Edit constituent default restrictions

1. On the record of the event registrant, select the Restrictions tab.
2. Click **Edit**, **Constituent default restrictions**. The Constituent default restrictions screen appears.

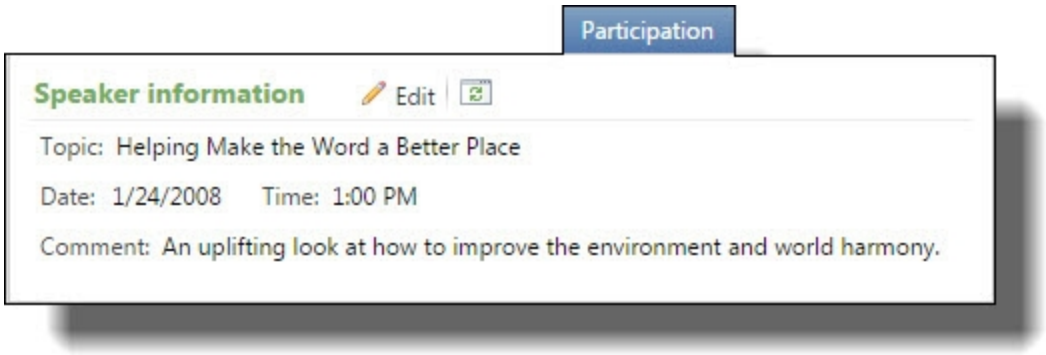


3. Edit the restriction types and options.
   - To add a restriction type, click a blank row, and select the restriction type and option.
   - To edit a restriction type or option, click the cell, and select the restriction type or option.
   - To delete a restriction, select the row, and press **DELETE** on your keyboard. When a confirmation message appears, click **Yes**.
4. To return to the Restrictions tab, click **Save**.

Registrant Participation

A registrant may participate in an event as more than an attendee. For example, a registrant may agree to speak at the event, such as part of a welcome address or seminar session. To view information about the registrant's involvement in an event, select the Participation tab on the registrant record.

Note: You can add a registrant as a speaker from the record of the registrant or the event. For information about how to add a registrant as a speaker from the registrant record, refer toAdd a Registrant as an Event Speaker on page 103.



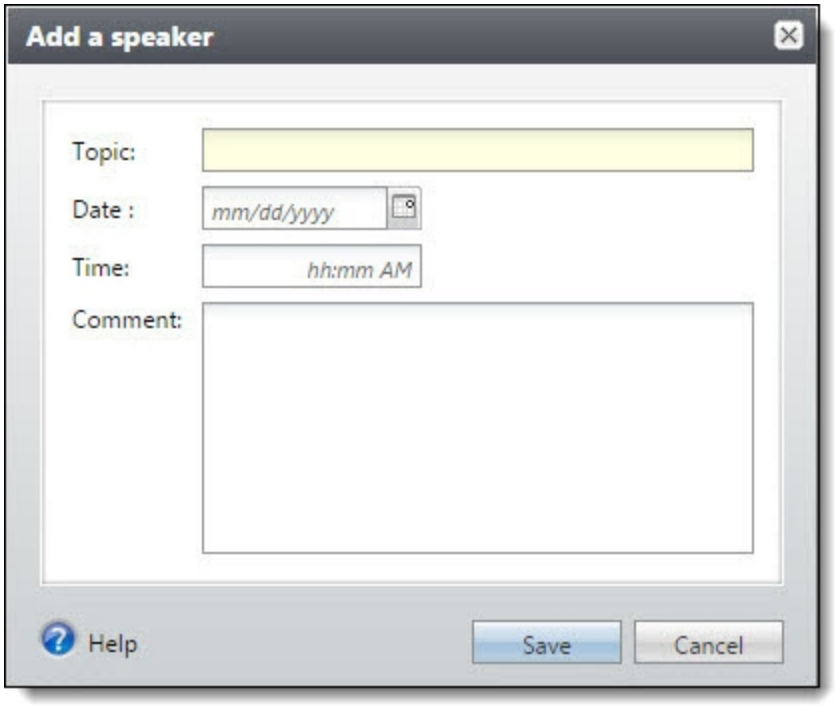
Under **Speaker information**, information about the presentation given by the registrant appears, such as topic and scheduled time. For information about how to edit this information, refer to Edit Registrant Speaker Information on page 104.

Add a Registrant as an Event Speaker

When a registrant agrees to speak or give a presentation at your event, you can add the registrant as a speaker. After you add a registrant as an event speaker, the Participation tab appears on the registrant's record so you can manage information about the presentation or special requests.

Add a registrant as an event speaker

1. On the record of the event registrant, click **Add as an event speaker** under **Tasks**. The Add a speaker screen appears.



2. In the **Topic** field, enter the subject or title of the presentation the registrant gives.

3. In the **Date** and **Time** fields, enter when the registrant is scheduled to speak. You must schedule the presentation within the dates and times of the event.
4. In the **Comments** field, enter additional information about the registrant, such as a request to have ice water near the podium, or the presentation, such as a detailed explanation of the topic.
5. To return to the registrant record, click **Save**.

Edit Registrant Speaker Information

After you add a registrant as a speaker to an event, the Participation tab appears on the registrant record. From this tab, you can edit the speaker information, such as to reschedule the presentation.

Note: When you edit speaker information from a registrant record, you cannot edit the registrant scheduled to speak at the event.

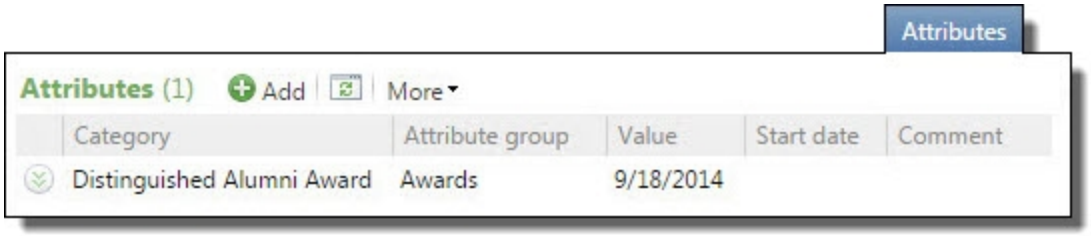
Edit speaker information for a registrant

1. On the record of the event registrant, select the Participation tab.
2. Under **Speaker information**, click **Edit**. The Edit speaker screen appears. The items on this screen are the same as the Add a speaker screen. For information about the items on this screen, refer to Add a Registrant as an Event Speaker on page 103.
3. Edit the information.
4. To return to the Participation tab, click **Save**.

Registrant Attributes

On the Attributes tab of a registrant page, you can add multiple attributes for each registrant. Registrant attributes help you identify the qualities, characteristics, and concerns associated with a particular registrant. On the Attributes tab, you can add, edit, or delete attributes for the registrant.

Note: The Attributes tab appears only if your system administrator configured registrant attributes. For information about how to add attribute categories, refer to the *Administration Guide*.



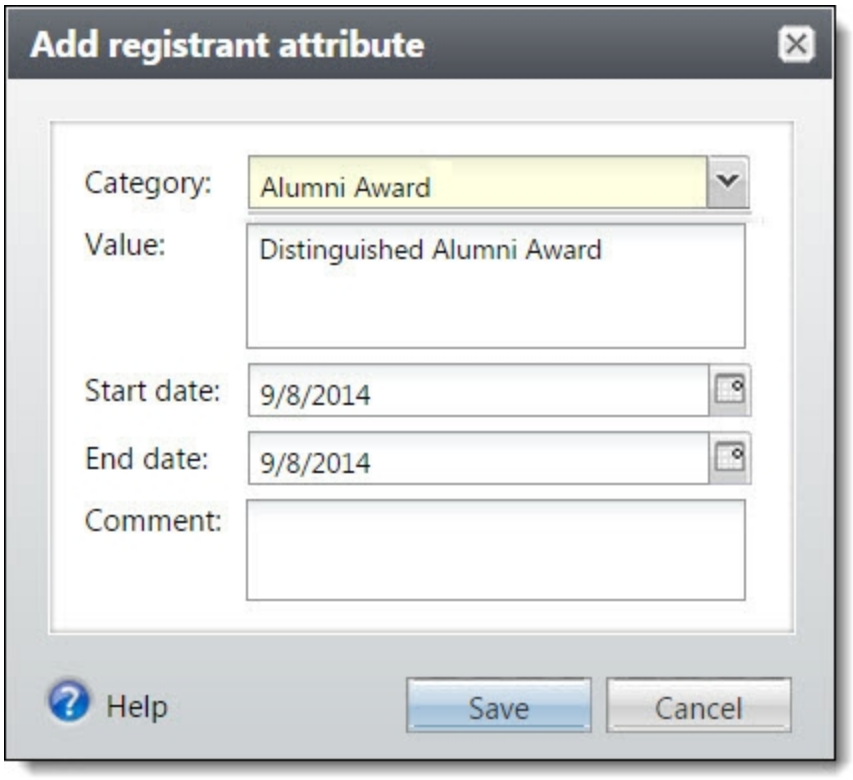
Add Registrant Attributes

On the Attributes tab of a registrant page, you can add attributes for the registrant. The possibilities with attributes are unlimited and can be configured for the registrants of your events.

Note: The Attributes tab appears only if your system administrator configures registrant attributes. For information about how to add attribute categories, refer to the *Administration Guide*.

Add a registrant attribute

1. On the Registrants tab of an event record, select a registrant under **Registrants**.
2. On the Attributes tab, click **Add** under **Attributes**. The Add registrant attribute screen appears. For information about the items on this screen, refer to Add Registrant Attribute Screen on page 106.



3. In the **Category** field, select the attribute category for the attribute. Your system administrator configures the attribute categories.
4. In the **Value** field, enter or select a value or description for the attribute.
5. In the **Start date** and **End date** fields, enter the dates when the attribute is valid for the event registrant.
6. In the **Comment** field, enter additional information about the attribute.
7. To return to the Attributes tab, click **Save**.

Add Registrant Attribute Screen

Screen Item	Description
Category	Select the attribute category for the attribute. Your system administrator configures the attribute categories.
Value	Enter or select a value or description for the attribute.
Start date/End date	Enter the start and end dates when the attribute is valid.
Comment	Enter additional comments or information about the attribute.

Delete Registrant Attributes

After you add a registrant attribute, you can delete it as necessary. On the Attributes tab of a registrant record, you can select a registrant attribute to delete.

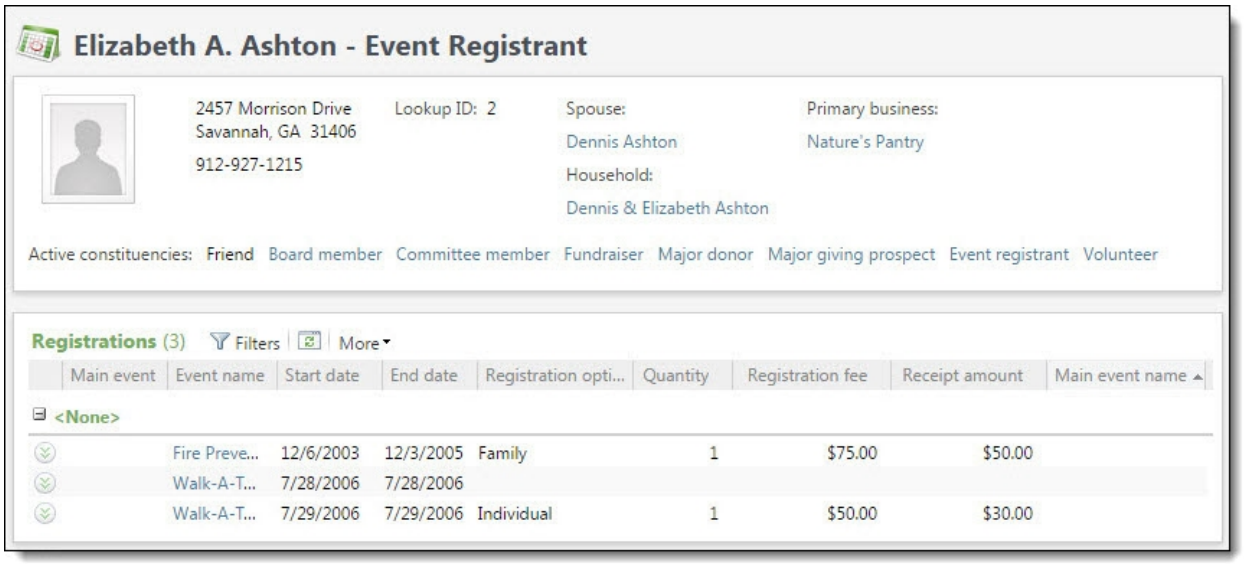
Note: The Attributes tab appears only if your system administrator configuresregistrant attributes. For information about how to add attribute categories, refer to the *Administration Guide*.

Delete a registrant attribute

1. On the Registrants tab of an event record, select a registrant under **Registrants**. The registrant record appears.
2. On the Attributes tab, select the attribute and click **Delete**. A confirmation message appears.
3. To return to the Attributes tab, click **Delete**.

Registrant View

When a constituent in your database is a registrant for an event or multiple events, you can open event information about the events the constituent. To view event information, from the constituent record, click **Event registrant** under **Constituencies**.



For more information about constituent views, refer to the *Constituents Guide*.

Event Seating

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You can set up seating for any type of event, including sporting events and dinners. Before you can assign registrants and groups of registrants to seats, you must first configure a seating layout. You can set up and determine the number of sections, rows, tables, and seats.

After you finish configuring the seating layout, you can assign registrants to seats. You can assign registrants to seats individually. You can also group registrants who request to sit together and assign each group to a section of seats. When you finish seating the registrants, you can generate a seating summary to verify the seating arrangement you created.

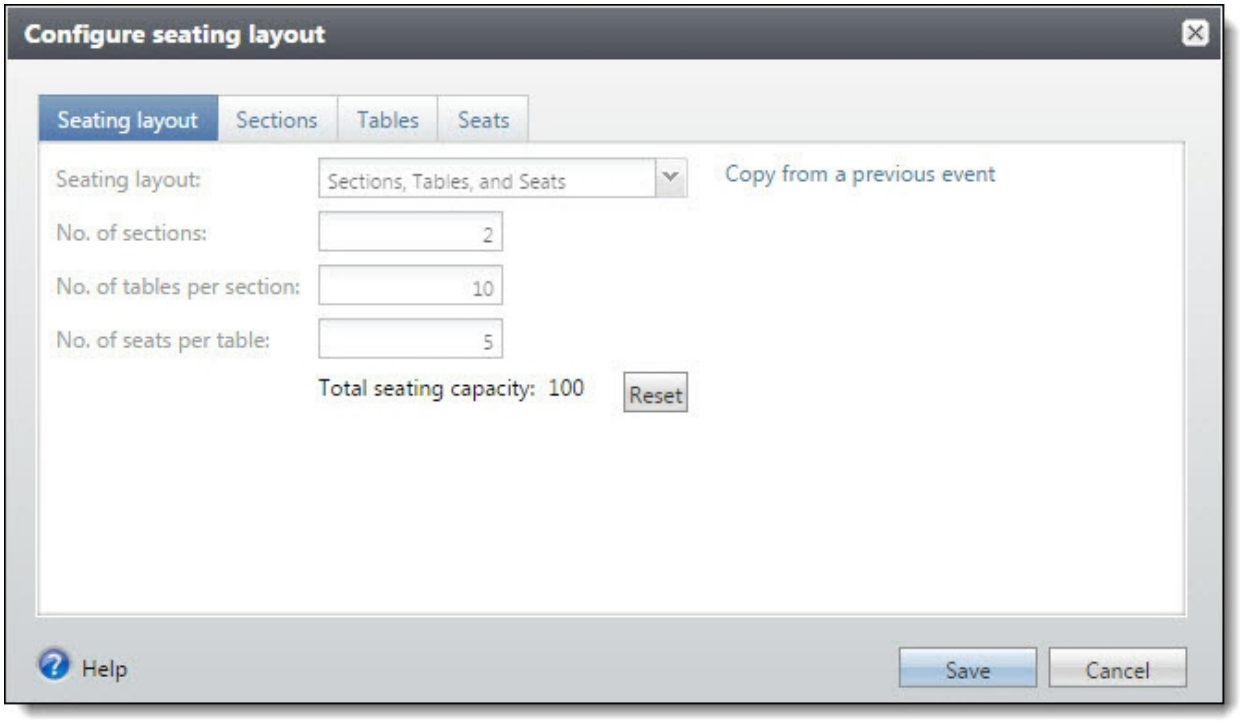
Configure Seating Layouts

Before you can assign participants, you must define your seating layout. On the Configure Seating Layout screen, you decide how to arrange your seating. You can set up sections, tables, and seats; sections, rows, and seats; or just sections and seats. You can determine the number of sections, tables, rows, and seats you need; and you can name your sections, tables, rows, and seats.

Tip: To save time, you can copy seating layouts from one event record to another. When you copy seating arrangements, the entire structure—sections, tables, rows, seats, names, and numbers—copies over from the original event to the new event. For more information about how to copy seating layouts, refer to Copy Seating Layouts on page 114.

Configure a seating layout

1. Open the event record to configure a seating layout.
2. Click **Configure seating layout** under **Tasks** on the explorer bar. The Configure event seating layout screen appears.



3. On the Seating layout tab, enter the necessary information in the fields. For more information about the items on this tab, refer toSeating Layout Tab on page 112.

   On the Seating layout tab:

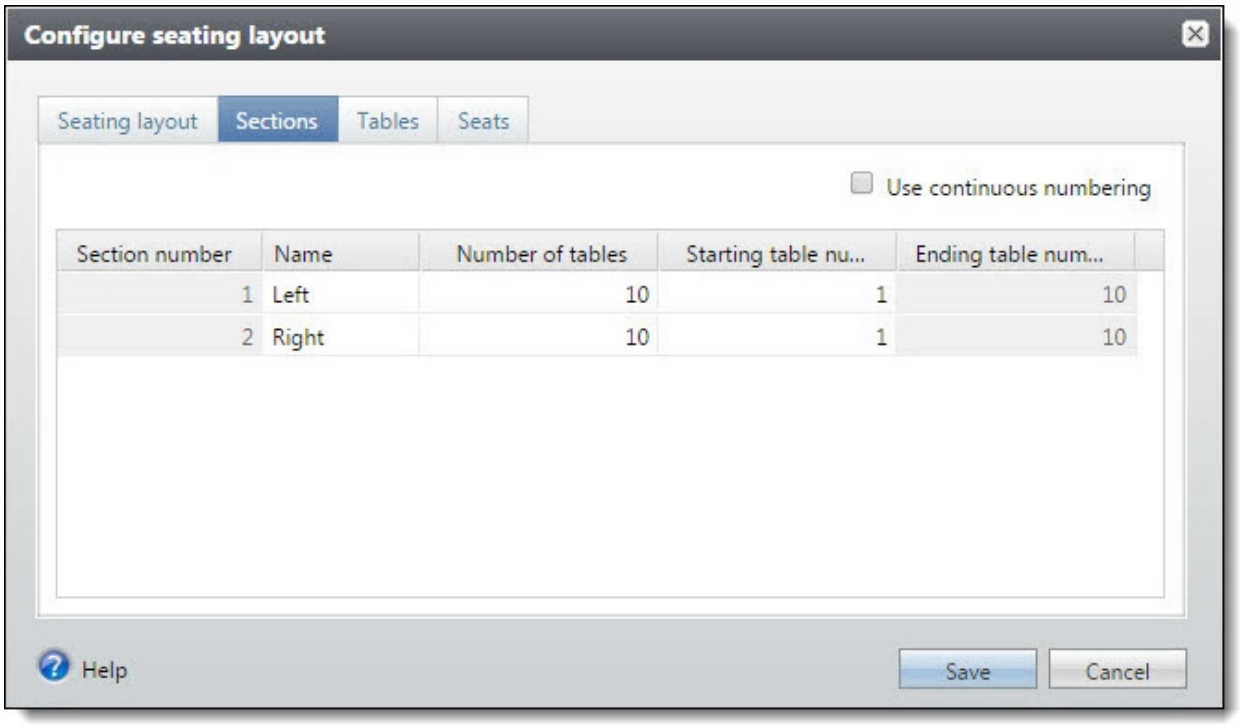
   a. In the **Seating layout** field, select whether to use "Sections, Tables, and Seats," "Sections, Rows, and Seats," or "Sections and Seats."

b. In the **No. of** fields, enter the number of each sections, tables per section, and seats per table to include in the seating layout.

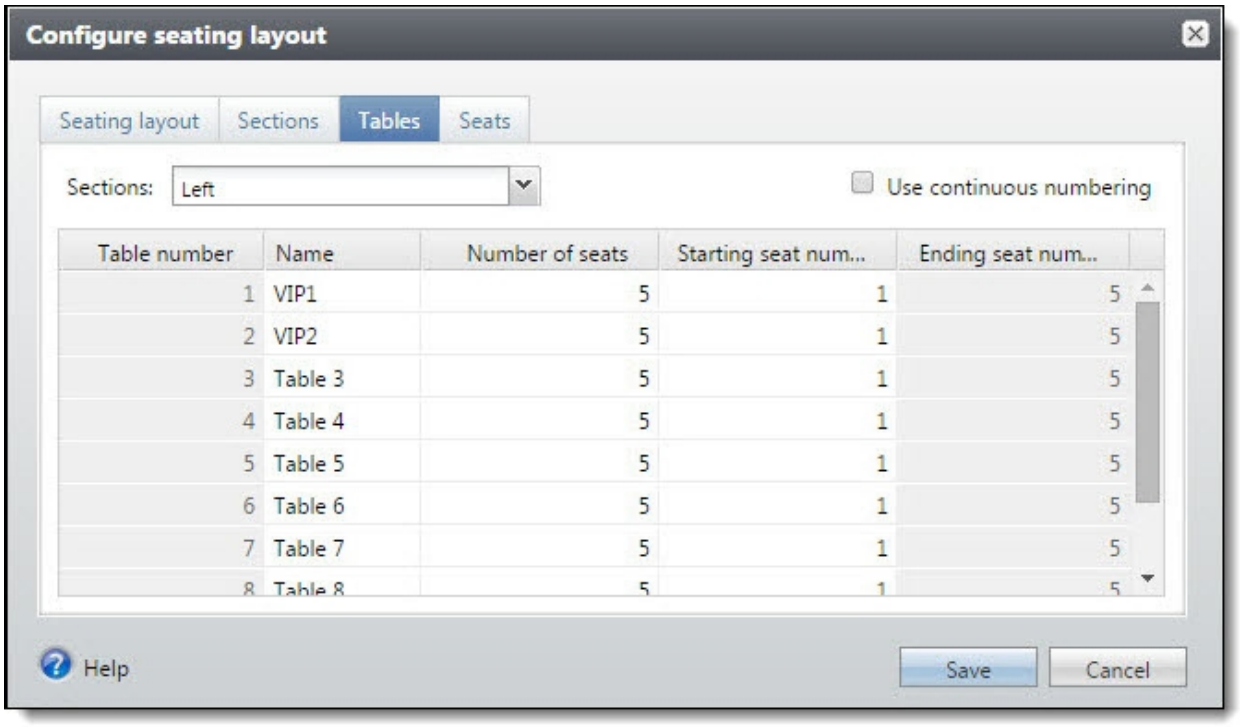
c. To clear all data and start over, click **Reset**.

Note: You must complete the fields on the Seating layout tab before you can proceed to the Sections, Rows, Tables, or Seats tabs.

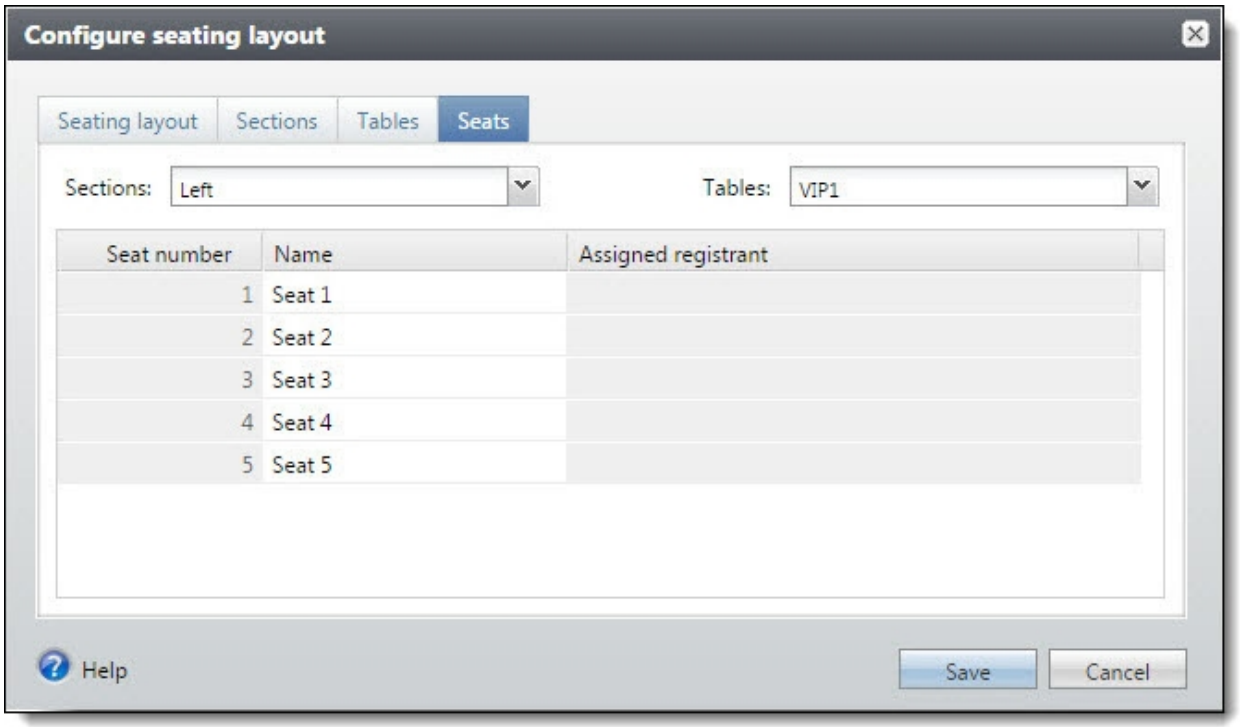
4. On the Sections tab, enter the necessary information in the fields. For more information about the items on this tab, refer to Sections Tab on page 112.



5. On the Tables or Rows tab, enter the necessary information in the fields. For more information about the items on this tab, refer to Tables or Rows Tab on page 113.



6. On the Seats tab, enter the necessary information in the fields. For more information about the items on this tab, refer to Seats Tab on page 114.



7. Click **Save**.

Configure Event Seating Layout Screen

The tables below contains information about the items on this screen. There is a separate table for each tab.

Seating Layout Tab

The table below contains information about the items on this tab.

Screen Item	Description
Seating layout	Select the seating arrangement to use. You can select "Sections, Tables, and Seats," "Sections, Rows, and Seats," or "Sections and Seats."
Copy from a previous event	Click this link to open a search screen to locate an event to copy a seating layout from.
No. of sections	Enter the total number of sections. Each section is made up of a specific number of tables or rows and seats. You can have only one section.
No. of tables per section	If your seating layout includes tables, enter the number of tables in each section.
No. of rows per section	If your seating layout includes rows, enter the number of rows in each section.
No. of seats per table	If your seating layout includes tables, enter the number of seats at each table.
Total seating capacity	The **Total seating capacity** appears based on the number of sections, tables, rows, and seats.
Reset	To clear data and start over, click **Reset**.

Sections Tab

The table below contains information about the items on this tab.

Screen Item	Description
Use continuous numbering	To use the last table number of the previous section as the starting point when numbering the next section, select **Use continuous numbering**. If you do not select **Use continuous numbering**, the first table in each section begins numbering with "1."

Screen Item	Description
Section number	The **Section number** column displays the number assigned to each section for which you selected tables and seats.
Name	Enter a unique name to identify each section. If you choose not to enter a name, the default name "Section" and the appropriate number displays.
Number of tables or **Number of rows**	If your seating layout includes tables or rows, the **Number of tables** or **Number of rows** column displays the total number of tables or rows in each section.
Starting table number or **Starting row number**	If your seating layout includes tables or rows, the **Starting table number** or **Starting row number** column displays the starting number of the first table or row of each section. To continue numbering from the previous section, select **Use continuous numbering**. If you do not select **Use continuous numbering**, the first table or row in each section begins numbering with the value "1."
Ending table number or **Ending row number**	If your seating layout includes tables or rows, the **Ending table number** or **Ending row number** column displays the number of the last table or row in each section. The number that displays is based on whether you select **Use continuous numbering**.

Tables or Rows Tab

The table below explains the items on this tab.

Screen Item	Description
Sections	Select a section, row, or table to view table, row, or seat information.
Use continuous numbering	To use the last seat number of the previous table or row as the starting point when numbering the next table, select **Use continuous numbering**. If you do not select **Use continuous numbering**, the first seat at each table or row begins numbering with "1."
Table number or **Row number**	If your seating layout includes tables or rows, the **Table number** or **Row number** column displays the number of each table or row. The table or row number is based on whether you selected **Use continuous numbering** on the Sections tab.
Name	Enter a unique name to identify each table or row. If you choose not to enter a name, the default name "Table" or "Row" and the appropriate number displays.
Number of seats	The **Number of seats** column displays the total number of seats included at each table or in each row.
Starting seat number	The Starting seat number column displays the starting number of the first seat at each table. To continue numbering from the previous table, select **Use continuous numbering**. If you do not select **Use continuous numbering**, the first seat at each table begins numbering with "1."
Ending seat number	The **Ending table number** column displays the number of the last seat at each table. The number that displays is based on whether you select **Use continuous numbering**.

Seats Tab

The table below explains the items on this tab.

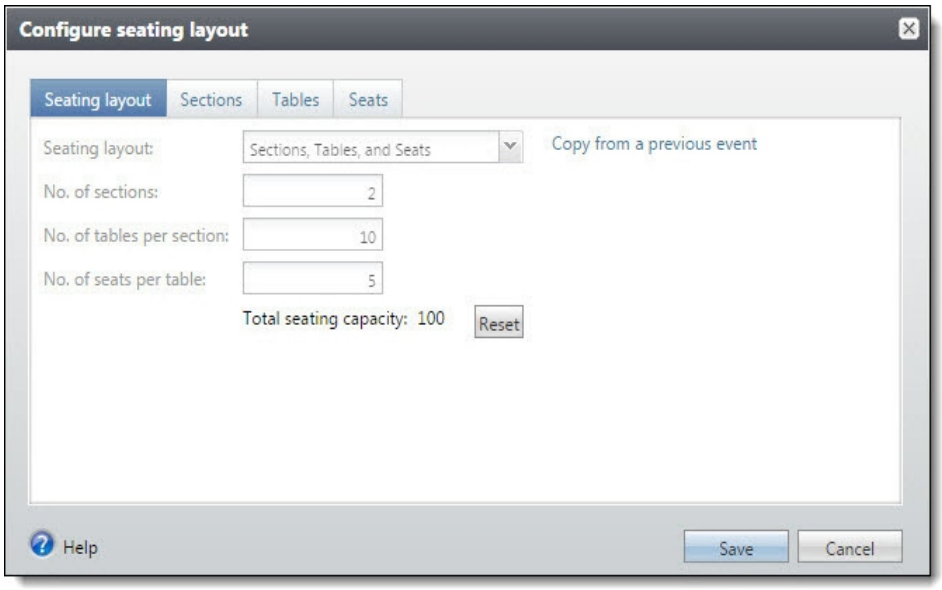
Screen Item	Description
Sections, **Rows**, or **Tables**	Depending on your seating layout, select a section to view table, row, or seat information.
Seat number	The **Seat number** column displays the number assigned to each seat. The seat number is based on whether you selected **Use continuous numbering** for the section, table, or row.
Name	Enter a unique name to identify each seat. If you choose not to enter a new name, the default name "Seat" and the appropriate number displays.
Assigned registrant	The **Assigned registrant** column displays the name of the registrant assigned to the seat. For more information on how to assign seats, refer to Assign Seats on page 115.

Copy Seating Layouts

To save time, you can copy seating layouts from one event record to another. When you copy seating arrangements, the structure—sections, tables, rows, seats, names, and numbers—copies over from the original event to the new event. When you use continuous numbering on the original event record, the continuous numbering sequences copy to the new event record.

Copy a seating layout from another event

1. Open the event record to configure a seating layout.
2. Click **Configure seating layout** under **Tasks** on the explorer bar. The Configure seating layout screen appears.



3. Click **Copy from a previous event**. The Event Search screen appears.
4. To copy a layout from a previous event, locate the event and click **Select**. You return to the Configure seating layout screen, which now displays the event seating information.
5. Click **Save**.

Assign Seats

After you configure seating layouts, you can assign registrants to seats.You can assign participants to seats individually, and you can group participants who request to sit together and assign each group to a section of seats.

Seating Screen

The seating screen is divided into the **Registrants** frame, the **Groups** frame, and the **Seating** frame. The tables below explain the items on this screen.

Registrants Frame

The **Registrants** frame displays the names of the registrants and guests added to the event from the Registrants tab of the event record. The table below explains this items in this frame.

Screen Item	Description
Assign to section/ table/row/seat	To assign a registrant to a section, table, row, or seat, select the registrant and the table and, in the **Registrants** frame, click **Assign to [].**

Screen Item	Description
Add to group	To add a registrant to a group, select the registrant and the group. In the Registrants frame, click **Add to group**.
Show	To filter the registrants, select one of the following: "All registrants," "Seated registrants," "Unseated registrants," "Grouped registrants," "Ungrouped registrants," "Ungrouped & unseated registrants," or "Registrants with guests."
Name	The **Name** column displays the name of each registrant.
Host	The **Host** column displays the name of the registrant of whom the selected registrant is a guest. When the registrant is a guest of no one, the **Name** column and the **Host** column display the selected registrant's name.
Group	When the registrant is part of a group, that group name appears here. You can add registrants through the Groups tab of an event record or on the seating screen.
Guest count	The **Guest count** column displays the number of guests each registrant brings to the event.When the registrant does not have any guests, "0" displays in this column.
Seat	After you assign the registrant to a seat, the full seat location (including assigned section, table, or row) displays in this column.
Seating note	The seating note column displays additional comments about seating. You enter seating notes in the **Seating note** field of the Edit registrant or guest screen. For example, if a guest registrant needs to be seated by his wife who is also a registrant, you can indicate this with a seating note.

Groups Frame

In the **Groups** frame, groups you create for the event appear. You can also create a group for participants to sit together. After you create and name a group, you can add participants to it. You can then assign the group to a section, table, or row in the **Seats** frame. The table below explains the items in this frame.

Screen Item	Description
Add	To create a new group of registrants, click **Add**. The Add event group screen appears. For more information about the items on this screen, refer to Add Event Seating Groups on page 122. When you add a group on the Seating screen, it is added to the Groups tab for the selected event as well.
Edit	To edit a group of registrants after you add them, select the group to edit and click **Edit**. The Edit event group screen appears. For more information about the items on this screen, refer to Edit Event Seating Groups on page 123.
Delete group	To delete a group of registrants, select the group and click **Delete group**. This deletes this group from the event, not just from the seating layout.

Screen Item	Description
Assign to [x]	To assign a group to a section, table, or row, select the group and the destination and, in the **Groups** frame, click **Assign to [x].**
Remove registrant	To remove a registrant from a group, select that registrant in the **Groups** frame and click Remove registrant. This removes the registrant from the group, but does not affect the registration for this registrant.

Seats Frame

In the Seats frame, you can view each section, and the tables, rows, and seats underneath each section. To expand a section, table, or row, click the plus sign. The table below explains the items in this frame.

Screen Item	Description
New section/ table/row/seat	To create an item, select an existing item and click this button. A new item is added to the item list you selected.
Delete section/ table/row/seat	To delete a section, table, row, or seat, select it and click this button. The item is deleted.
Up/down arrows	Click the arrows to move a section, row, table, or seat up or down on the seating screen.

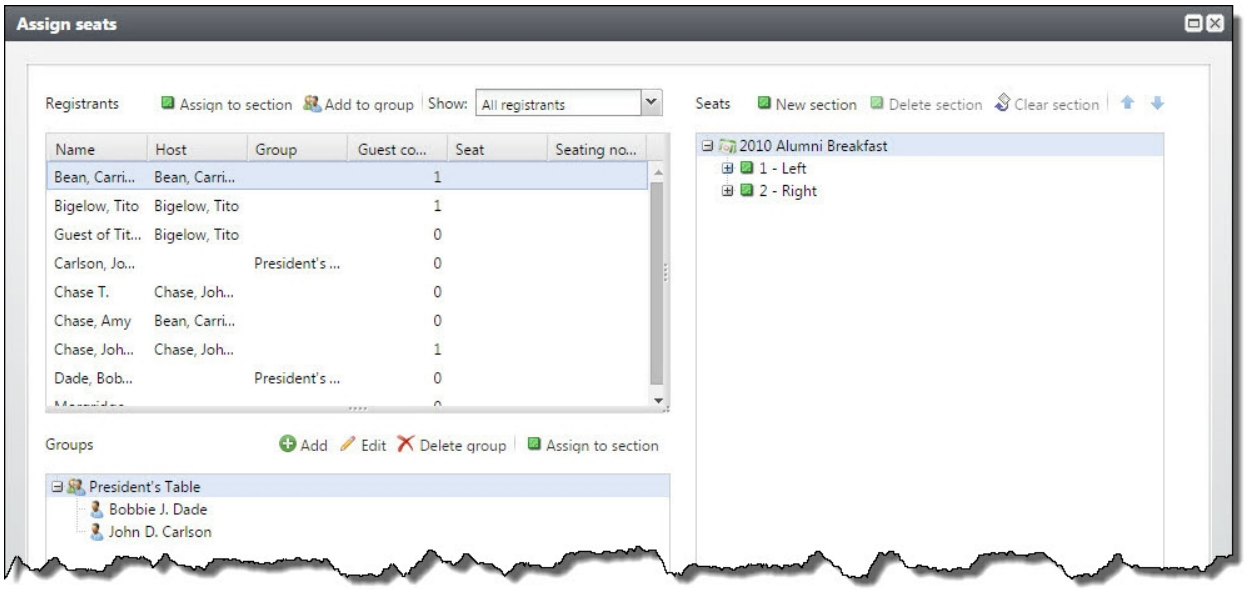
Assign Individual Registrants to Seats

From the **Registrants** frame of the seating screen, you can assign each registrant to a seat at a table or row within a section.

Note: When you assign registrants to a section, table, or row, a warning message appears when there are not enough seats to accommodate a registrant. A screen alerts you and asks if you want to add seats. To add a seat, click **Yes**. When you click **No**, no one is assigned to a seat.

Assign a registrant to a seat

1. On the event record, click **Assign seats** under **Tasks**. The seating screen appears.



2. Under **Registrants**, select a registrant. In the **Seats** frame, select a seat.
3. Click **Assign to seat** []. The registrant is assigned to the seat. You can assign registrants to seats or just to specific tables, rows, or sections. When you assign a registrant to a section, table, or row, that registrant is assigned to the first available seat in that section, table, or row.

Note: After you select a registrant under **Registrants**, you can also click and drag the registrant to a seat, or you can right-click and select to assign the registrant to a seat.

4. To return to the event record, click **Save**

Assign Multiple Registrants to Seats

From the **Registrants** frame of the seating screen, you can assign multiple registrants to seats or a table or row within a section. This procedure shows you how to drag and drop multiple registrants from the **Registrants** frame to the **Seats** frame. You can also select multiple registrants in the **Registrants** frame and use the **Assign to** button on the action bar to assign registrants to the **Seats** frame.

Note: When you assign registrants to a section, table, or row, a warning message appears when there are not enough seats to accommodate a registrant. A screen alerts you and asks if you want to add seats. To add a seat, click **Yes**. When you click **No**, no one is assigned to a seat.

Assign multiple registrants to seats

1. On the event record, click **Assign seats** under **Tasks**. The seating screen appears.
2. To assign multiple registrants, hold down the **SHIFT** key and in the **Registrants** frame, select the appropriate registrants. In the **Seats** frame, select a section, table, or row.

Note: After you select registrants under **Registrants**, you can click and drag them to a row or table and assign them to the selected row or table, or you can right-click and select to assign them to a selected row or table.

3. Click **Assign registrant to** []. The registrants are assigned to the seats in the section, table, or row you selected.
4. Click **Save**. You return to the event record.

Reassign Registrants to Different Seats

If you determine you need to place the registrant somewhere else after you assign a registrant to a seat, you can reassign the registrant to another seat.

Tip: To save time, in the **Seats** frame, click on a registrant and drag them to a different seat to automatically reassign the registrant to the new seat.

Remove a registrant and assign to another seat

1. On the event record, click **Assign seats** under **Tasks**. The seating screen appears.
2. Under **Seats**,click the seat to reassign.
3. Select **Remove registrant**. The registrant is removed from that seat.
4. To assign the registrant to a different seat, select the seat under **Seats**.
5. Under **Registrants**, select the registrant and click **Assign to seat**.
6. To return to the event record, click **Save**.

Clear Seat Assignments

After you assign participants from the **Registrants** frame to the **Seats** frame, you can clear your seating assignments. You can also clear seating assignments when you have assigned groups from the **Groups** frame to the **Seats** frame. For information about assigning groups to seats, refer to Assign Groups to Seats on page 121.

Clear seating assignments

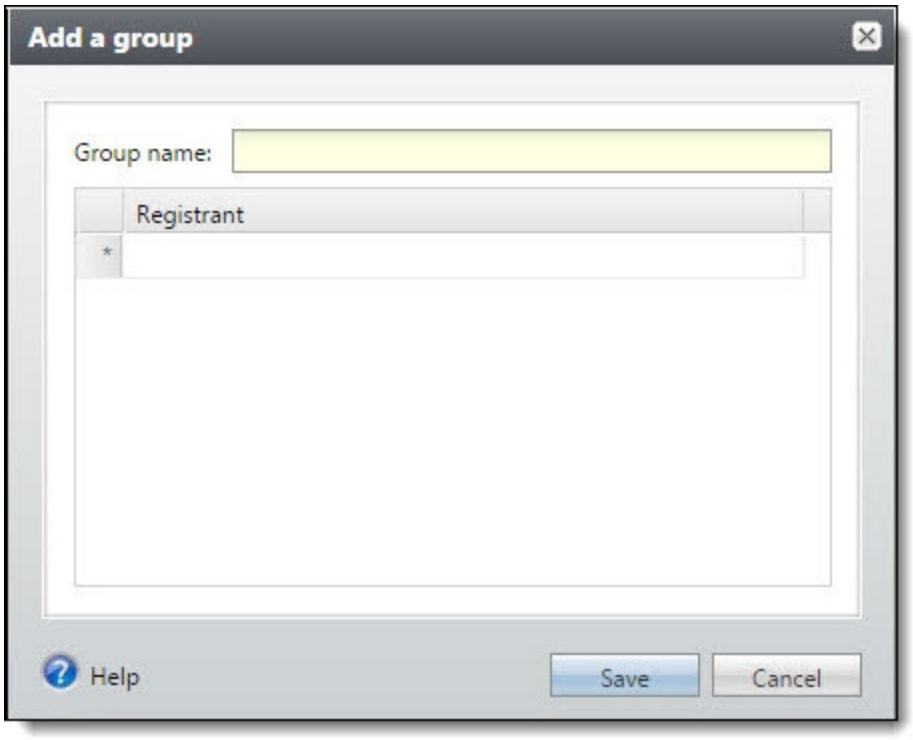
1. On the event record, click **Assign seats** under **Tasks**. The seating screen appears.
2. Under **Seats**, click on the event name..
3. Select **Clear section**. Seating assignments disappear from your seating arrangement in the **Seats** frame. You can now assign registrants to seats again.
4. To return to the event record, click **Save**.

Assign Registrants to Groups

When participants register for an event, they may often request to sit with other registrants. To accommodate your registrants' wishes, you can create named groups. After you create a named group and add registrants to the group, you can assign the entire group to seats at the same table or row within a section.

Assign registrants to a group

1. On the event record, click **Assign seats** under **Tasks**. The seating screen appears.
2. When groups already exist for an event, they appear under **Groups**. If a group does not already exist, click **Add**. The Add a group screen appears.



3. Enter and save information to create the group. For more information about how to add a group, refer to Add Event Seating Groups on page 122.

Note: You can add, edit, or delete a group from the Groups tab of the event record. Groups you create through the seating screen are added to the grid on the Groups tab.

4. Under **Groups**, click the icon beside the group name to highlight it.
5. Under **Registrants**, select a registrant.

Tip: To assign multiple registrants to a group, hold down the **SHIFT** key and in the **Registrants** frame, select the registrants.

6. Click **Add to group**. The registrant now appears with the group under **Groups**.

Tip: To add a registrant to a group, you can also click a registrant name in the **Registrants** frame and drag it to a group in the **Groups** frame. To add multiple registrants, hold down the **SHIFT** key and in the **Registrants** frame, select the registrants and drag them to a group in the **Groups** frame.

7. To return to the event record, click **Save**.

Assign Groups to Seats

After you create a named group and add registrants to the group, you can assign the entire group to seats at the same table or row within a section.

Note: A warning message appears if there are not enough seats within a section, table, or row to accommodate any or all registrants within the group when you assign it to a section, table, or row, . A screen alerts you if enough seats are not available and asks if you want to add seats. To add a seat, you click **Yes** and additional seats are added to accommodate the registrants in the group. When you click **No**, the group is not assigned to seats.

Assign a group to seats

1. On the event record, click **Assign seats** under **Tasks**. The seating screen appears.
2. Under **Seats**, select a section, table, or row to which to assign the group.
3. Under **Groups**, select a group and click **Assign to section**. The registrants in the group now appear next to the seats in the section, table, or row under **Seats**.

Tip: To assign a group to seats, click a group name under **Groups** and drag the group to a section, row, or table in the **Seats** frame.

4. To return to the event record, click **Save**.

Add Sections, Rows, Tables, or Seats

On the seating screen, you can add additional sections, rows, tables, or seats to the seating layout as needed. For this example, we will add a row to a section, but the same steps apply when you add new sections, tables, or seats.

Add a section, row, table, or seat

1. On the event record, click **Assign seats** under **Tasks**. The seating screen appears.
2. Under **Seats**, select a section to add a row and click **New row**. A row appears in the section.
3. To return to the event record, click **Save**.

Rename Sections, Rows, Tables, or Seats

On the seating screen, you can rename sections, rows, tables, or seats to the seating layout as needed. For this example, we will rename a section, but the same steps apply when you rename a table, row, or

seat.

Rename a section, row, table, or seat

1. On the event record, click **Configure seating layout** under **Tasks**. The Configure seating layout screen appears.
2. On the Sections tab, click on the section to rename.
3. Select the name of section in the name column that you rename. The section name becomes editable.
4. Enter a name for the section.
5. To return to the event record, click **Save**.

Delete Sections, Rows, Tables, or Seats

On the seating screen, you can delete sections, rows, tables, or seats from the seating layout as needed.

Warning: Deleting sections, rows, tables, or seats actually changes your seating layout. To remove a registrant from a table, but not remove that seat from the table, you can reassign that registrant to another seat. For more information, refer to Reassign Registrants to Different Seats on page 119.

Delete a section, row, table, or seat

1. On the event record, click **Assign seats** under **Tasks**. The seating screen appears.
2. Under **Seats**, select the section, row, table, or seat to delete and click **Delete [ ]**. A confirmation message appears.
3. To delete the selection, click **Yes**.
4. To return to the event record, click **Save**

Event Seating Groups

You can create groups of registrants who want to be seated together for an event. From an event, click **Assign seats** under **Tasks**. On this screen, you can add, edit, and delete event seating groups. For example, you might add a family of registrants to a group for an upcoming dinner event. You then use the groups to seat people in a single action on the seating screen.

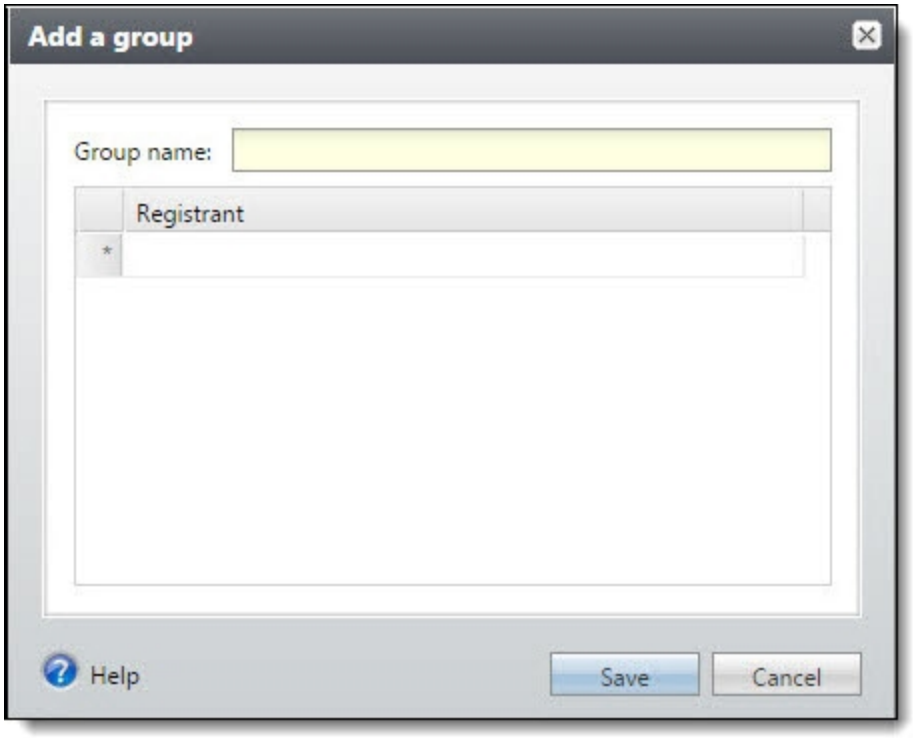
Add Event Seating Groups

You can create groups of registrants for an event. From an event, click **Assign seats** under **Tasks**. On this screen, you can add, edit, and delete event seating groups. You then use the groups to seat people in a single action on the seating screen.

Note: Before you can designate a constituent as a member of an event seating group, you must first add the constituent as a registrant for the event.

Add an event seating group

1. On the event record, click **Assign** seats under **Tasks**. The Assign seats screen appears.



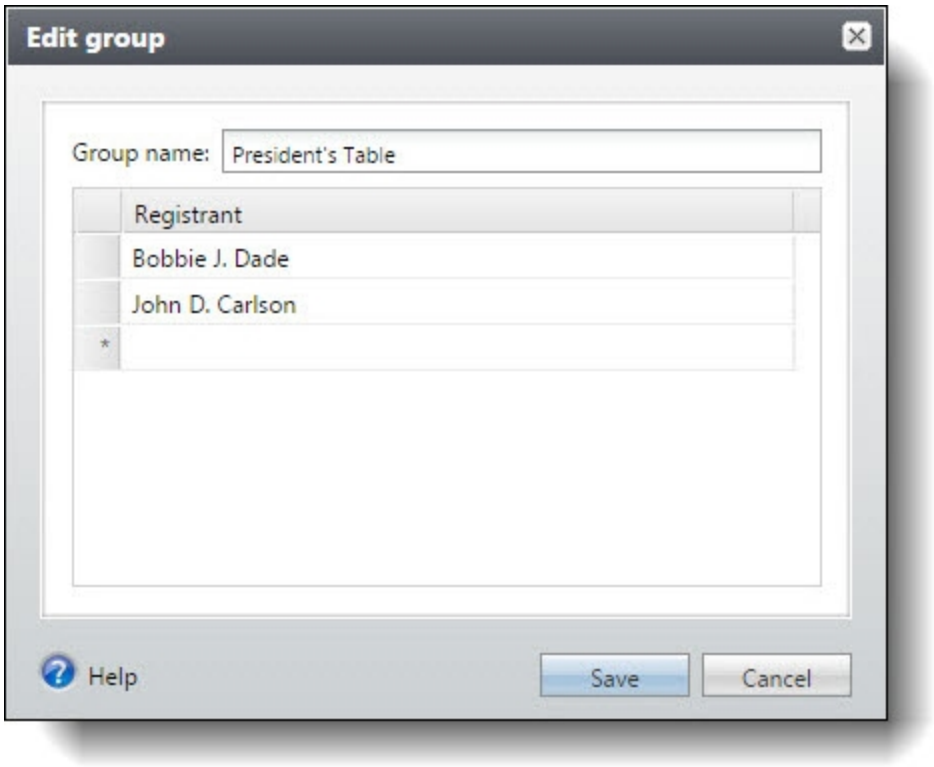
2. Under **Groups**, click **Add**. The Add a group screen appears.
3. In the **Group name** field, enter text to identify the group.
4. In the **Registrant** column, select a row. To locate a registrant to add to the group, click the binoculars.
5. Click **Save**.

Edit Event Seating Groups

After you add seating groups, you can edit details for the group as needed. On the Assign seats screen for an event, you can select a seating group to edit. You can create groups for an event. From an event, click **Assign seats** under **Tasks**.

Edit an event seating group

1. From an event, click **Assign seats** under **Tasks**. The Assign seats screen appears.
2. Under **Groups**, select the seating group to edit and click **Edit**. The Edit group screen appears.



3. Edit the seating group's name or its registrants. To locate a different registrant, or to add a registrant to the group, click the binoculars to locate the correct registrant.
4. Click **Save**.

Delete Event Seating Groups

After you add event seating groups, you can delete groups as needed. On the Assign seats screen for an event, you can select a seating group to delete.

Note: When you delete a seating group, you delete only the group and not the registrants assigned to the group.

Delete an event seating group

1. From an event, click **Assign seats** under **Tasks**. The Assign seats screen appears.
2. Under **Groups**, select the seating group and click **Delete**. A confirmation message appears.
3. Click **Yes**.

Event Invitations

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With *Events*, you can manage the invitation processes for you various events, create lists of invitees for events, and manage invitation status for each invitee in a list.

You can:

- Run automatic invitation processes to record that invitations were sent
- Add multiple invitation processes
- Rerun processes for selected invitees
- Add an invitation process to an event at any time

Note: If you want to get an accurate count of invitees for events, you must use the Event Summary node in Query. Incorrect counts can exist elsewhere when constituents were invited to the same event using multiple Invitation Processes.

Invitations Workflow

The creation and management of invitations for an event requires multiple steps.

- From *Marketing and Communications*, create the export definitions for event invitations. The export definition determines the fields in an export file for an invitation, such as for merge with Microsoft *Word* or an email application.
- From *Marketing and Communications*, create the packages for the event invitation for mail and email. When you create a package, you select the content and export definition to include in an invitation. When you add a package, you can also specify its cost.
- From the event record, add the invitation to the event. You can add an invitation to send through multiple channels such as mail and email. When you set up an invitation, you select the packages to use with the invitation for the selected channels. You can also specify addresses, name formats, and packages to use for invitees. For information about how to add an invitation, refer to Add Event Invitations on page 128.
- Add invitees to the invitation. To receive an invitation, an invitee must be a constituent in your database. You can add a constituent or a selection of constituents as invitees. For information about how to add invitees, refer to Add an Invitee to an Invitation on page 134 or Add Multiple Invitees to the Invitation on page 134.

Tip: To add invitees to an event, you can copy the invitees from another event. For example, for an annual event, you can copy the invitees from the previous year's event. For information about how to copy invitees, refer to Copy Invitees on page 137.

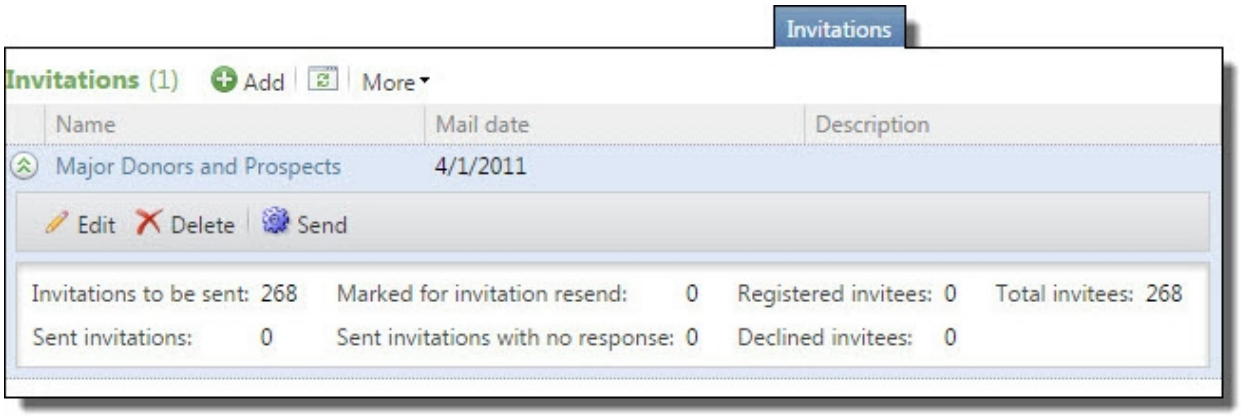
- After you set up the invitees, run the process to send the invitation to the invitees. When you run the send process, the export definitions of the selected packages create invitations for the invitees marked to be included in the next send process. For information about how to send an invitation, refer to Send Invitations on page 132. After the invitations are sent, the invitees display on the Registrations tab of the event record. Their default status is "No reply." From here, you can mark

them as declined or register them for the event. For more information, refer to Event Registration on page 83.

- Depending on the channel, download the invitation output or merge the output with Microsoft *Word* or your email client to create and send the invitations to the invitees. For information about how to download the output, refer to Manage Invitation History on page 138.
- After you send invitations, you can manage your invitations from the event's Registrations tab. For more information, refer to Registrants and Guests on page 85.
- From the Invitations tab, you can continue to add invitees to an invitation and generate the invitation for additional invitees. For information about how to manage the invitees and their response, refer to Manage Invitees on page 133.

Invitations

To view or manage the invitations associated with an event, select the Invitations tab on the event record.



Note: Event management properties determine whether multi-level events have things such as registrants, speakers, and lodging options, as well as the corresponding tabs. Event templates set the properties for multi-level events. To override the properties for specific events, click **Edit event management properties** under **Tasks**.

Under **Invitations**, you can view the mail date and description for each invitation. To view additional information about an invitation, click the arrows next to the invitation in the grid to expand the Invitees summary. The **Invitees summary** appears and displays information such as the number of invitations pending, sent, or marked to be re-sent; the number of sent invitations with no response; and the total number of invitees and how many registered or declined.

To view the invitees associated with an invitation, select the invitation in the grid. The Invitees page for the invitation appears. For information about the items on this page, refer to Invitee List on page 133.

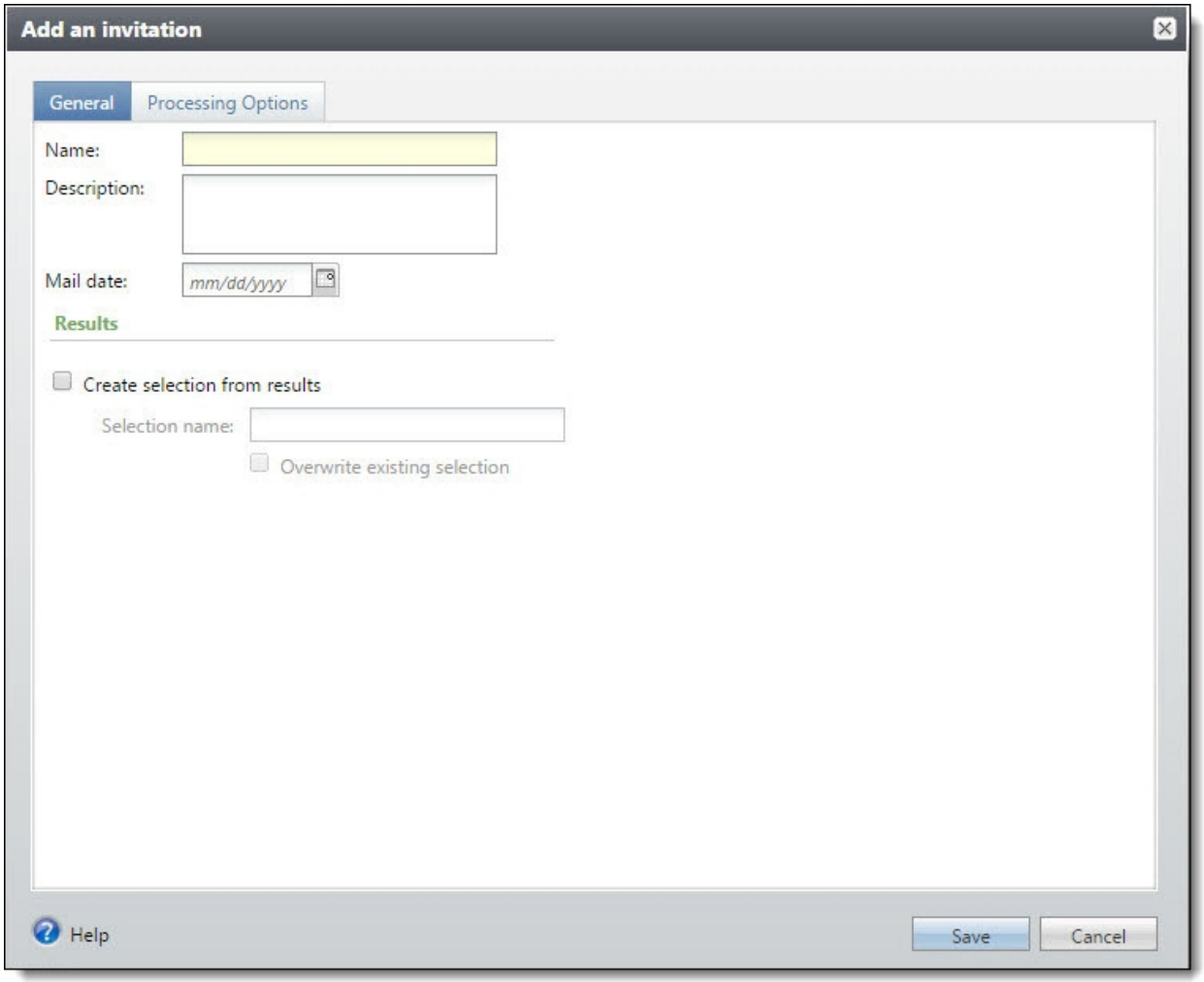
From the grid, you can add and manage invitations for the event.

Add Event Invitations

From the Invitations tab of an event record, you can add invitations to send through mail or email for the event. As you set up an invitation, you can specify addresses, name formats, and packages to use for invitees. After you add an invitation, you can open the invitee list to specify the constituents to receive the invitation and then start the process to send invitations.

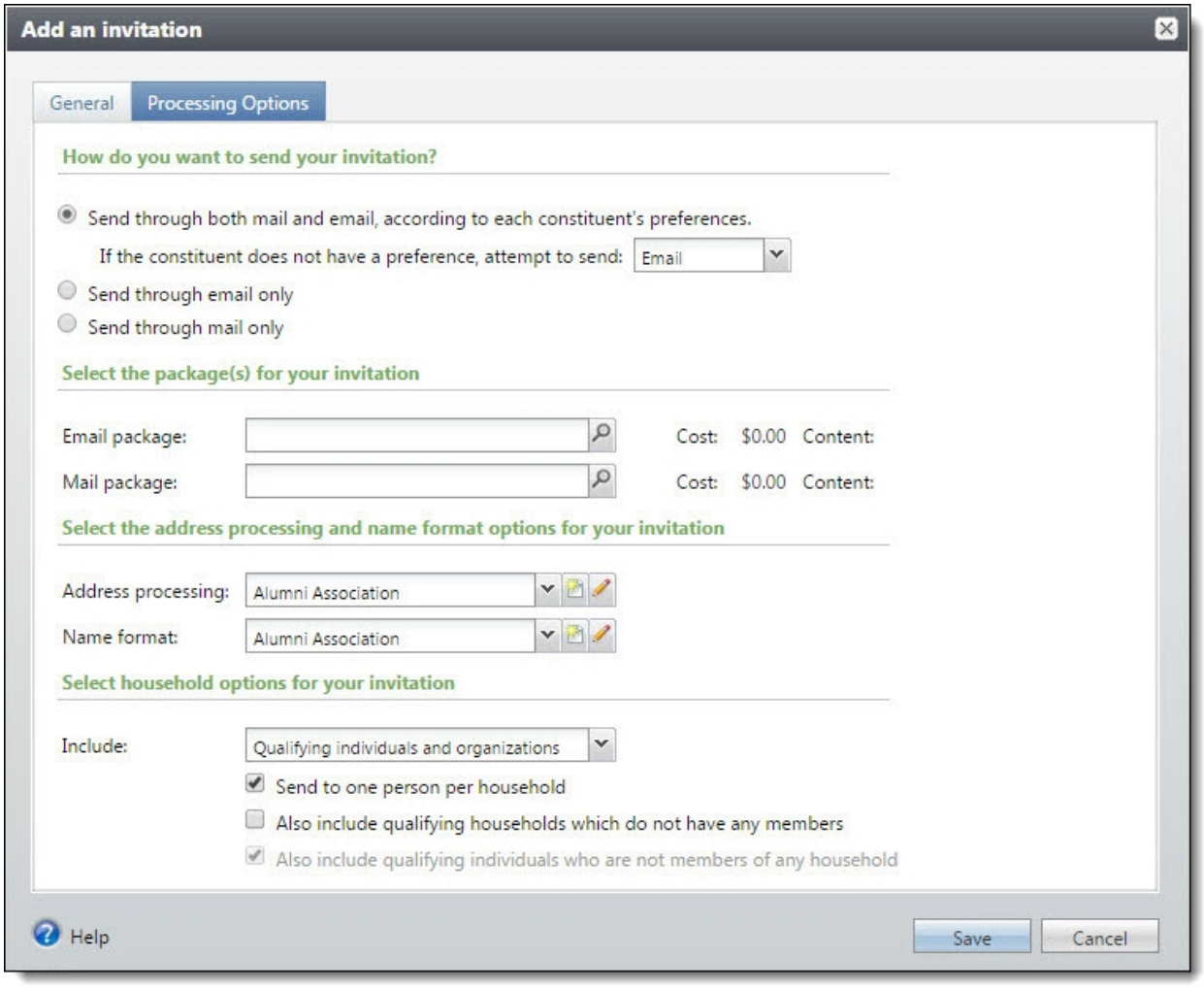
Add an invitation

1. On the Invitations tab of an event record, click **Add** under **Invitations**. The Add invitation screen appears. For information about the items on this screen, refer toAdd Invitation Screen on page 130.



2. On the General tab, enter a unique name and description to help identify the invitation.
3. In the **Mail date** field, select the date you plan to send the invitation to its invitees.

4. Under **Results**, select whether to create a selection of the constituents who receive the invitation. If you select **Create selection from results**, enter a name to identify the selection and select whether overwrite an existing selection with the same name.
5. To set up the content and delivery method of the invitation, select the Processing Options tab.



6. Select whether to send the invitation through mail, email, or both.

   If you select to send the invitation through both mail and email, the invitation sends in accordance with the communication preferences configured for each invitee. Select which method to use for constituents without a communication preference for mail or email.
7. Select the package to use for the delivery methods. The **Cost** and **Content** fields display the budget cost and items included in the package.
8. In the **Address processing** field, select the option to use to determine which address types to use with the constituents included in the invitation. From the field, you can add or edit an address processing option.

9. In the **Name format** field, select the option to use to determine addressees and salutations to use with the constituents included in the mailing. From the field, you can add or edit a name format option.
10. In the **Include** field, select the types of constituents from the invitee list to include in the mailing.
    - When you select All qualifying constituents, the invitation includes constituents that meet the selection and exclusion criteria.
    - When you select Qualifying individuals and organizations, the invitation includes all individual and organization constituents that meet the selection and exclusion criteria. Select whether to include only one person per household when multiple qualifying individuals share a household and whether to include individuals who are not members of a household.
    - When you select Qualifying households, the invitation includes all constituent households that meet the selection and exclusion criteria. Select whether to also include qualifying households that do not have members.
11. To return to the Invitations tab, click **Save**.

Note: For information about how to add invitees to the invitation, refer to Add an Invitee to an Invitation on page 134.

Add Invitation Screen

The table below explains the items on the Add invitation screen. For information about how to open this screen, refer to Add Event Invitations on page 128.

Screen Item	Description
Name	Enter a unique name to identify the invitation.
Description	Enter a description to identify the invitation, such as whether it is a premium or standard invitation.
Mail date	Select the date to send the invitation to its invitees.
Create selection from results	Select whether to create a selection of the constituents included in the invitation. When you select this checkbox, enter a name for the new selection. To replace an existing selection of the same name with the new selection, select **Overwrite existing selection**.
How do you want to send your invitation?	Select whether to send the invitation through mail, email, or both. If you select **Send through both mail and email, according to each constituent's preferences**, select the method to use for constituents without a communication preference for mail or email.

Screen Item	Description
Mail package	When you select to send the invitation through mail, the Mail package field appears. Search for and select the package to send through the mail. The package determines the items delivered in the invitation. When you select a package, the **Cost** and **Contents** field display information about the package.
Email package	When you select to send the invitation through email, Email package field appears. Search for and select the package to send through email. The package determines the items delivered in the invitation. When you select a package, the **Cost** and **Contents** field display information about the package.
Address processing	Select the option to use to determine which address types to use with the constituents included in the invitation. From the Address processing field, you can add or edit an address processing option.
Name format	Select the option to use to determine the addressees and salutations to use with the constituents included in the invitation. From the Name format field, you can add or edit a name format option.
Include	Select the types of constituents to include in the invitation, based on the constituent selection and exclusions. You can select to include all constituents, only individual and organization constituents, or only constituent households.
Send to only one person per household	When you select to include Qualifying individuals and organizations, this checkbox appears. Mark whether to include only the head of household when multiple qualifying individuals are members of the same constituent household.
Also include qualifying households which do not have any members	When you select to include Qualifying individuals and organizations, this checkbox appears. Mark whether to include constituents households that meet the selection and exclusion criteria but do not have members.
Also include qualifying individuals who are not members of any household	When you select to include Qualifying households, this checkbox appears. Mark whether to include individual constituents who meet the selection and exclusion criteria but are not members of a household.

Edit Invitations

After you add invitations to an event, you can edit an invitation from the Invitations tab of the event record.

Note: In earlier versions, output formats determined the information in an invitation communication, such as for a merge with Microsoft *Word*. Invitations now use the export definition associated with the package to determine this information.When you upgrade from an earlier version and have an invitation that has not been sent, you must select a package to determine its export definition if you edit the invitation from the Edit invitation screen. To retain its output format, do not edit the invitation. You can edit the output format or mail date when you send the invitation.

Edit an invitation from an event

1. On the Invitations tab of an event record, click the down arrows next to the invitation to edit.
2. Click **Edit** on the action bar. The Edit invitation screen appears. Edit the information. The items on this screen are the same as on the Add invitation screen. For information about the items on this screen, refer to Add Invitation Screen on page 130.
3. To return to the Invitations tab, click **Save**.

Delete Invitations

After you add invitations to an event, you can delete an invitation from the Invitations tab of the event record. When you delete an invitation, you also delete associated invitation history from the event.

Delete an invitation from an event

1. On the Invitations tab of an event record, click the down arrows next to the invitation you wish to delete.
2. Click **Delete** on the action bar. A confirmation message appears.
3. To return to the Invitations tab, click **Yes**.

Send Invitations

After you specify the invitees for an invitation, you can send the invitation to its recipients. After you send the invitation, you can open the Invitation History tab on the Invitees page to view status and history information for the invitation process.

After you run an invitation process, you can run the process again to send additional invitations to selected invitees. For example, when you add invitees to the invitation, you can mark those invitees as **Include in next send** and run the process again.

Send an invitation

1. On the Invitations tab of an event record, click the down arrows next to the invitation to send.

Note: To send an invitation from its Invitees page, click **Send [name of invitees list] invitees** under **Tasks**. The Send invitation screen appears.

2. Click **Send** on the action bar. The Send invitation screen appears. Edit the information. The items on this screen are the same as the Add invitation screen. For information about the items on this screen, refer to Add Invitation Screen on page 130.

Note: In earlier versions, output formats determined the information in an invitation communication, such as for a merge with Microsoft *Word*. Invitations now use the export definition associated with the package to determine this information.When you upgrade from an earlier version and have an invitation that has not been sent, you can edit its output format and mail date from the Send invitation screen. If you edit the invitation from the Edit invitation screen, you must select a package to determine its export definition.

3. Click **Start**. The invitation process status page appears.

Note: For information about the items on this page, refer to Invitation Processes on page 144.

Invitee List

After you add an invitation for an event, you can add and manage its invitees from the invitee list page. To open the invitee list page for an invitation, select the invitation on the Invitations tab of the event record.

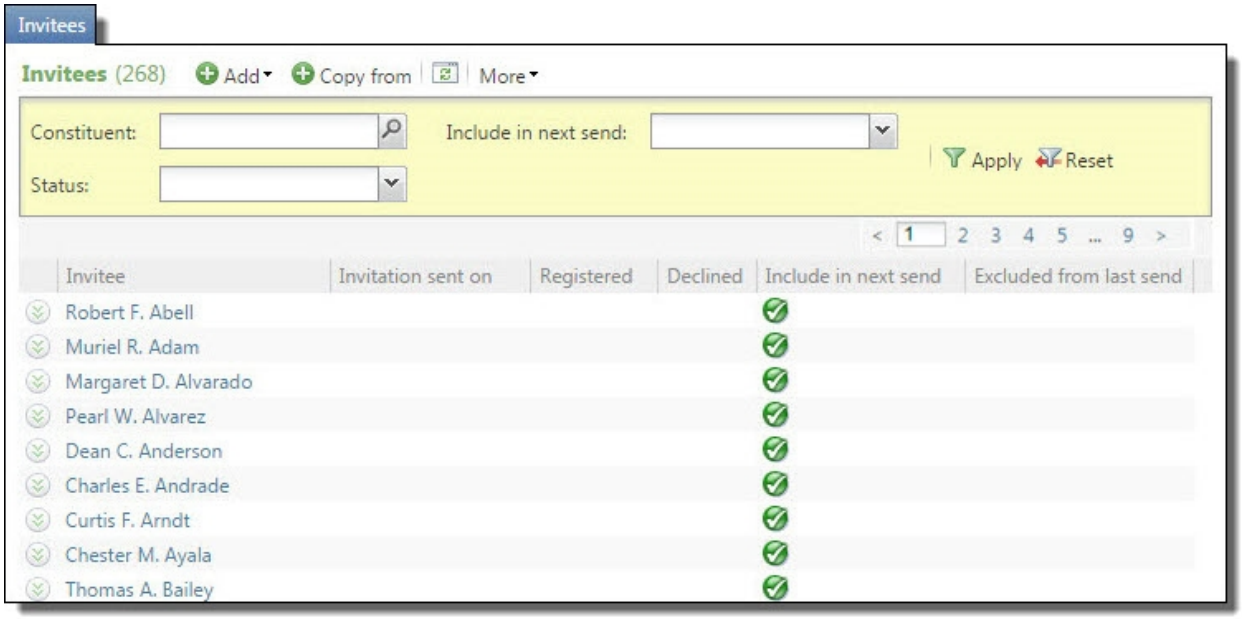
The invitee list page contains a list of invitees for the selected invitation. From this list, you can add and manage invitees, view constituent information about an invitee, and manage the invitees' registration and declined status. From the invitee list page, you can also view and manage the history information for the invitation process.

Under **Tasks**, you can view and run the process to send the invitations to its invitees.

Note: If you want to get an accurate count of invitees for events, you must use the Event Summary node in Query. Incorrect counts can exist elsewhere when constituents were invited to the same event using multiple Invitation Processes.

Manage Invitees

From the Invitees tab of an invitee list page, you can add and manage the invitees for the invitation.



Under **Invitees**, the constituents added to the invitee list appear. For each invitee, you can view the date the invitation was sent, whether the invitee registered or declined, and whether to include the invitee during the next instance of the invitation process. The **Excluded from last send** column indicates whether an invitee was excluded from the previous instance of the invitation process, such as

due to default household or exclusion options. To view constituent information about an invitee, click the name of the invitee in the grid.

To help reduce the number of invitees that appear in the grid, such as to locate an invitee, you can select the criteria of the invitees to view, such as constituent name or status. On the action bar, select the criteria of the invitees to view and click **Apply**.

Note: The **Constituent** filter returns results only for constituents in the event's invitee list.

From the grid, you can manage the status of the invitees, such as to indicate whether an invitee declines an invitation and whether to send additional invitations to an invitee. You can also add and manage invitees.

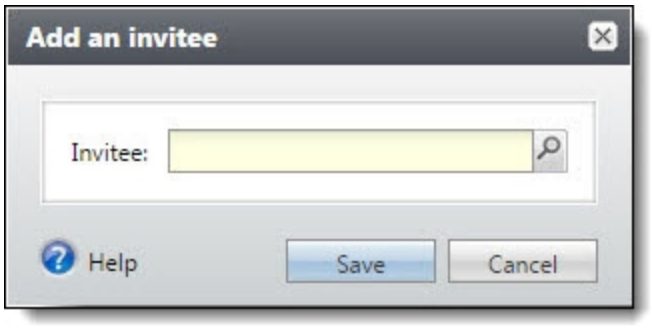
Add an Invitee to an Invitation

Invitees are the constituents to whom you send an invitation for an event. You can add a constituent as an invitee.

Tip: To add invitees, you can use a constituent selection to add multiple invitees at one time. You can also copy the invitee list from another event, such as the previous year's instance of an annual event. For information about how to add multiple invitees at one time, refer to Add Multiple Invitees to the Invitation on page 134 or Copy Invitees on page 137.

Add a specific invitee

1. On the invitee list page of the invitation, select the Invitees tab.
2. Click **Add** and select **Constituent**. The Add an Invitee screen appears.



3. Search for and select the constituent to add as an invitee.
4. To return to the Invitees tab, click **Save**.

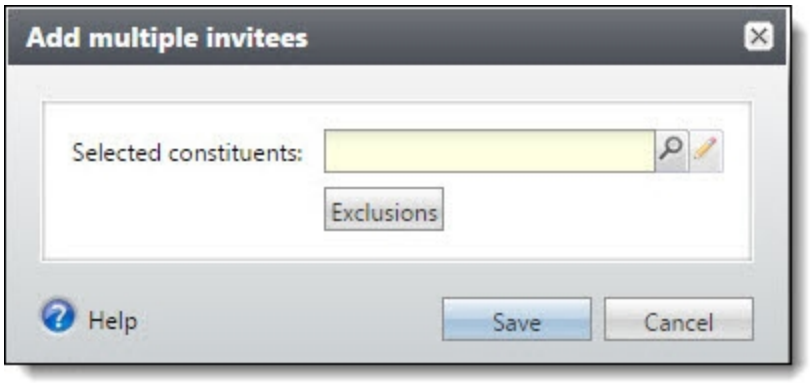
Add Multiple Invitees to the Invitation

Invitees are the constituents to whom you send an invitation for an event. To add multiple invitees at one time, you can add a selection of constituents as invitees. When you add a constituent selection to the invitee list, you can also select the criteria, such as solicit codes, of the constituents in the selection to exclude from the list.

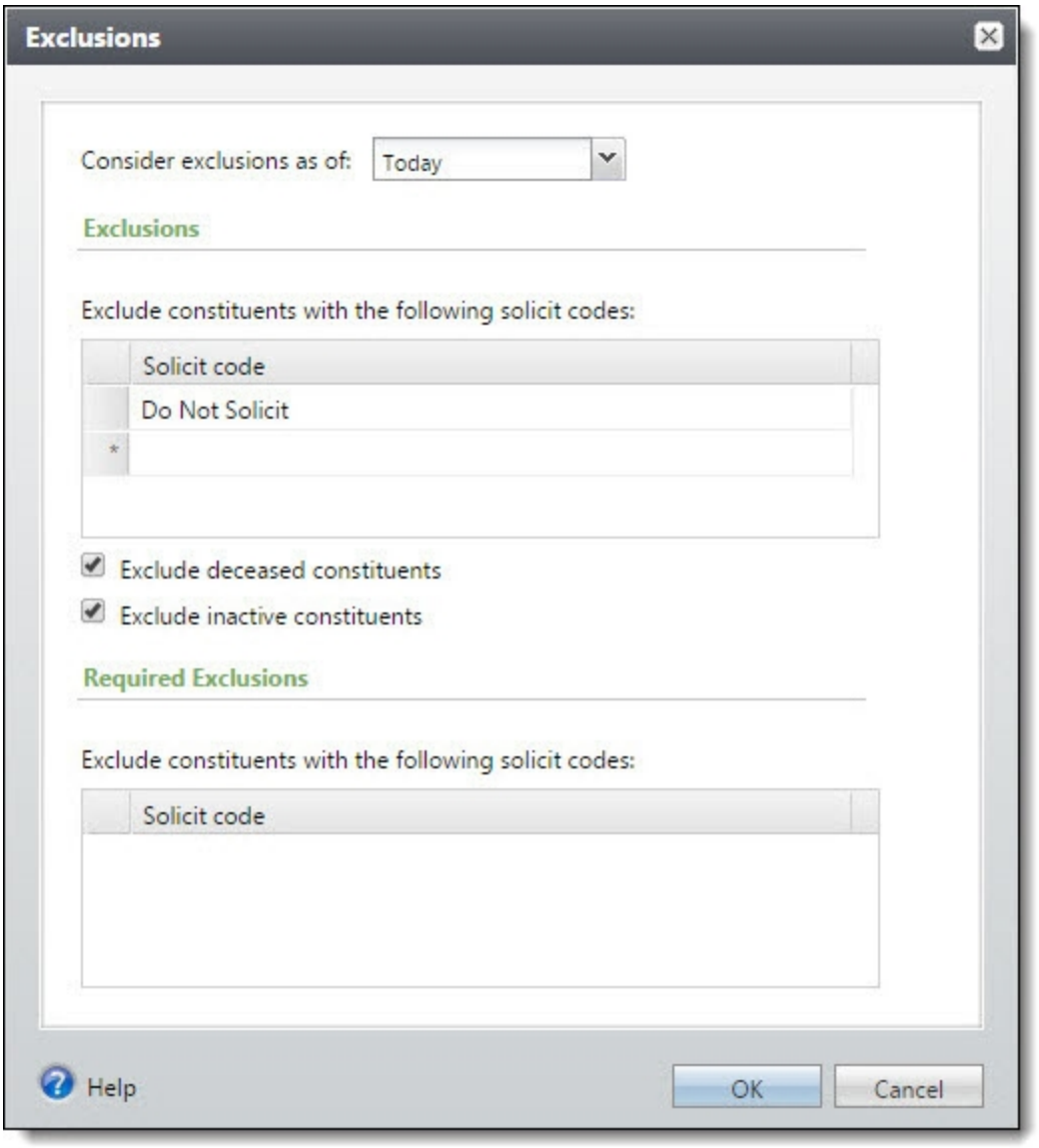
Tip: To add multiple invitees, you can also copy the invitee list from another event, such as the previous year's instance of an annual event. For information about how to copy invitees, refer to Copy Invitees on page 137.

Add multiple invitees

1. On the invitee list page of the invitation, select the Invitees tab.
2. Click **Add** and select **Multiple constituents**. The Add multiple invitees screen appears.



3. Search for and select the selection of constituents to add as invitees.
4. Select the criteria of the constituents in the selection to exclude from the invitee list.
   a. Click **Exclusions**. The Exclusions screen appears.



b. In the **Consider exclusions as of** field, select whether to consider the exclusion criteria as of the current date or a specific date, such as the mail date of the invitation. If you select Specific date, select the date to use.

c. Under **Exclusions**, select the solicit codes of additional constituents to exclude from the invitee list. Under **Required Exclusions**, the solicit codes excluded from communications appear.

d. Select whether to exclude constituents marked as deceased or inactive.

e. Click **Save**. You return to the Add multiple invitees screen.

5. To return to the Invitees tab, click **Save**.

Delete an Invitee from an Invitation

After you add invitees to an invitation, you can remove an invitee from the list.

Warning: When you delete an invitee who has registered for the event, the invitee no longer appears on the invitee list but remains as "Registered" on the Registrations tab of the event record.

Delete an invitee

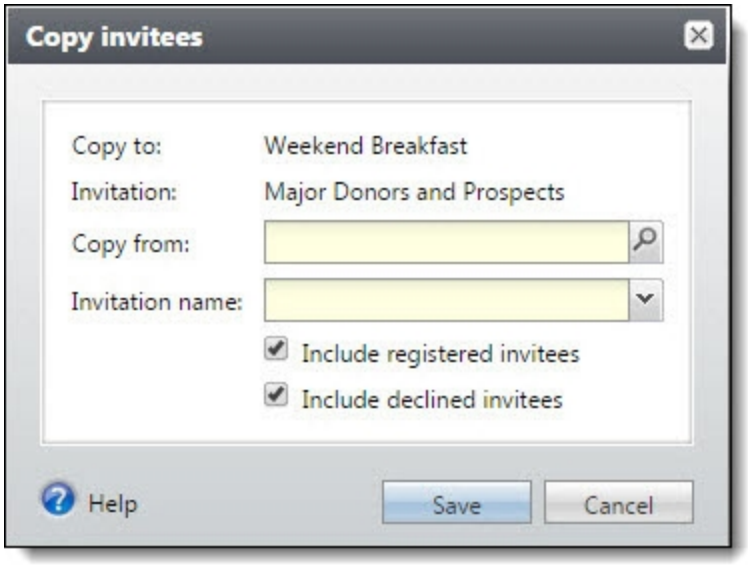
1. On the invitee list page of the invitation, select the Invitees tab.
2. Under **Invitees**,click the down arrows next the invitee to delete and click **Delete**. A confirmation message appears.
3. To return to the Invitees tab, click **Yes**.

Copy Invitees

Invitees are the constituents you send an invitation for an event. To add multiple invitees at one time, you can copy them from another event. For example, when your organization hosts an annual gala, you can copy the invitees from the previous year's event to the new event.

Copy invitees from an event

1. On the invitee list page of the invitation, select the Invitees tab.
2. Select the Invitees tab and click **Copy from**. The Copy invitees screen appears with the current event and invitation included.



3. In the **Copy from** field, search for and select the event from which to copy the invitee list.
4. In the **Invitation** field, select the invitation of the event from which to copy the invitee list.

5. Select whether to copy registered or declined invitees from the selected event and invitation.
6. To return to the Invitees tab, click **Save**.

Include Invitees in Next Send

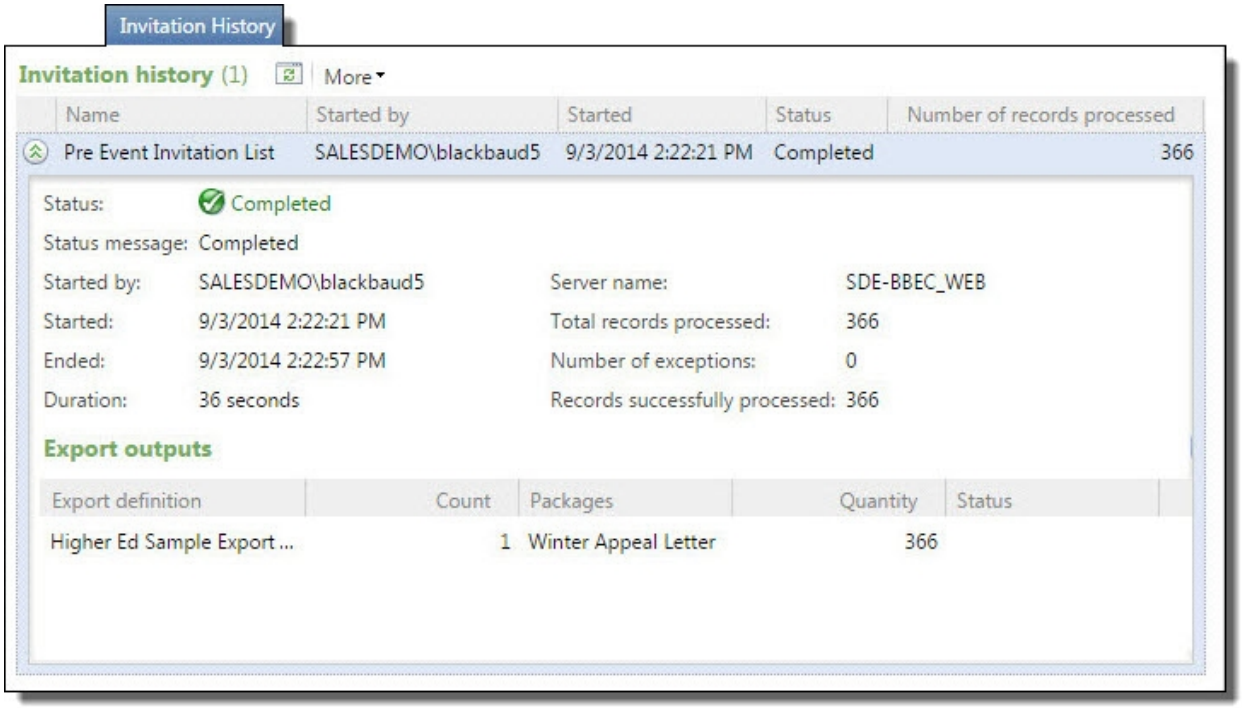
After you first run an invitation process, you can continue to run the process to send additional invitations. When you run the process again, you can include invitees not already sent the invitation or those who require another invitation. To include an invitee in a future instance of the invitation process, on the Invitees tab of an invitee list page, click the down arrows next to the invitee to include and click **Include in next send** on the action bar. When you first add an invitee, the program marks the invitee as **Include in next send** until you next run the invitation process.

Exclude Invitees in Next Send

After you first run an invitation process, you can continue to run the process to send additional invitations. When you run the process again, you can exclude invitees sent the invitation or those who decline to attend the event. To exclude an invitee from a future instance of the invitation process, on the Invitees tab of an invitee list page, click the down arrows next to the invitee to exclude from next send and select **Exclude from next send** on the action bar. After you first run the invitation process, the program marks all invitees as **Exclude from next send**.

Manage Invitation History

On the Invitation History tab of an invitee list page, you can view information about previous instances of the invitation process.



Under **History**, the previous instances of the process appear. For each instance, you can view its status, the user who started the process, the date and duration of the instance, and the number of records processed. To help reduce the number of instances that appear in the grid, such as to locate a specific instance, you select to view only instances with a specific status. On the action bar, click **Filter**, select the status of the instances to view, and click **Apply**.

To view additional information about a process, select it in the grid. The details window appears and displays information such as how many of the records processed were exceptions and how many processed successfully and the export definitions and packages used with instance. From the details window, you can download the output of an instance or generate the output in Microsoft *Word*.

For an invitation with an email package that includes a ***Blackbaud Internet Solutions*** export definition, the detail window also provides options to manage the email job.

Download the Invitation Output into a Single File

After you run an invitation process for an event, you can download its output into a file for use in another application. For example, you might send data to a fulfillment house. When you download the output, a comma-separated value (*.csv) file generates and saves at a location you specify.

Tip: You can also download the output into multiple files, based on the information exported. For example, you can download the output into multiple files based on the states where the constituents reside. For information about how to download multiple files or groups files, refer to Download the Invitation Output into Multiple Files on page 140 or Download the Invitation Output into Grouped Files on page 141.

Download the output into a single file

1. Select the instance of the invitation process with the output to download.
   - On the invitee list page of the process, select the Invitation History tab. Under **History**, select the instance to download and click **Show Details** on the action bar.
   - On the status page of the process, select the Recent status tab to download output for the most recent instance. To download output for a previous instance, on the History tab, select the instance to download, and click **Show Details** on the action bar.
2. Select the export definition to download and click **Download output** and select **Single file**. The Save As screen appears.

Note: On the Save As screen, the **Save as type** field displays "Comma separated value (*.csv)". You cannot select to download another type of output file. In a comma-separated value (*.csv) file, each piece of data is separated by a comma. A *.csv file is also referred to as a "comma-delimited" or "ASCII" file.

3. Enter a name for the output file and map to the location to save the downloaded output file.
4. Click **Save**. The output file downloads at the designated location. When the download finishes, a message appears to ask whether to open the output file.
5. To open the output file in the default application set to open a *.csv file such as Microsoft *Excel*, click **Yes**. To return to the process status page, click **No**.

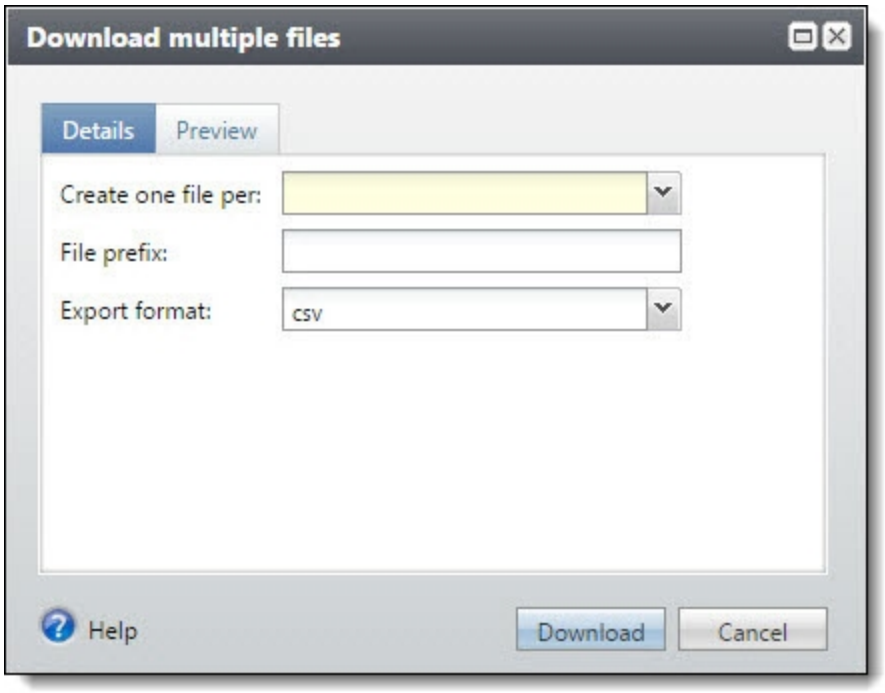
Download the Invitation Output into Multiple Files

After you run an invitation process for an event, you can download its output into multiple files based on the information in the output. For example, you can download the invitation information into multiple files based on the states where the recipients reside. When you download the output, the comma-separated value (*.csv) files generates at a location you specify.

Note: In a comma-separated value (*.csv) file, each piece of data is separated by a comma. A *.csv file is also referred to as a "comma-delimited" or "ASCII" file.

Download the output into multiple files

1. Select the instance of the invitation process with the output to download.
   - On the invitee list page of the process, select the Invitation History tab. Under **History**, select the instance to download and click **Show Details** on the action bar.
   - On the status page of the process, select the Recent status tab to download output for the most recent instance. To download output for a previous instance, on the History tab, select the instance to download, and click **Show Details** on the action bar.
2. Select the export definition to download and click **Download output** and select **Multiple files**. The Download multiple files screen appears.



3. In the **Create one file per** field, select the output field on which to generate multiple files. For example, to download multiple files based on the states in which the recipients reside, select to create one file per state.

Tip: A copy of the output of each instance of the process saves at the specified location. To divide the data in multiple ways, you can download the output multiple times with a different output field selected as the basis of the files generated.

4. When you download multiple files, the file names are based on the values of the field you select in the **Create one file per** field. For example, if you download an output file for each state, the program generates files named Alabama.csv, Alaska.csv, and so on.

Tip: To further identify the information in each output file, in the **File prefix** field, enter text to appear at the beginning of the file names generated for the export output. For example, enter "Recipients in -" to download files named Recipients in - Alabama.csv and Recipients in - Alaska.csv.

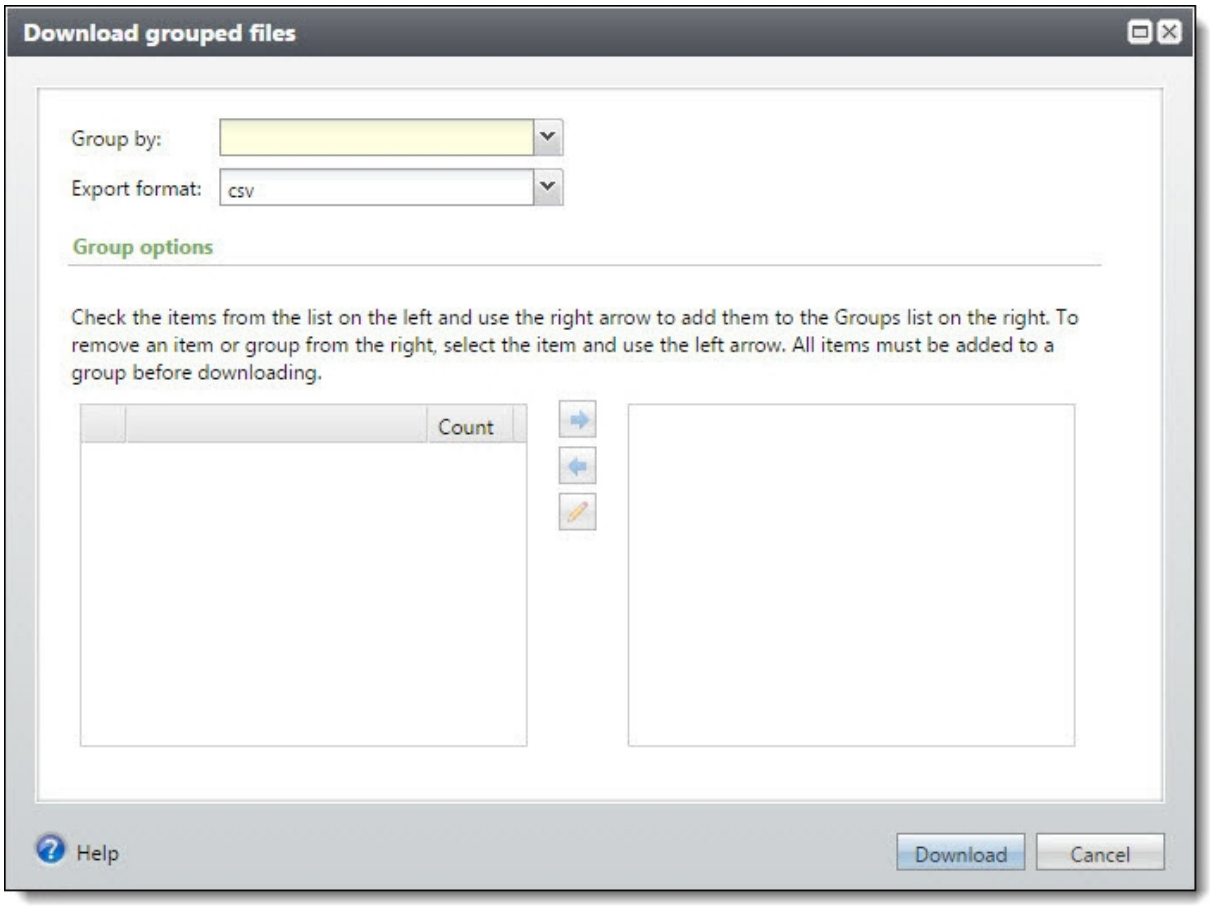
5. In the **Export format** field, click the down arrow and select the file format of your export.
6. To view the names and record counts of the multiple files, select the Preview tab.
7. Click **Download**. The output files download at the designated output path. When the download finishes, a message appears to ask whether to open the output path.
8. To open the output path to access the output files, click **Yes**. To return to the process status page, click **No**.

Download the Invitation Output into Grouped Files

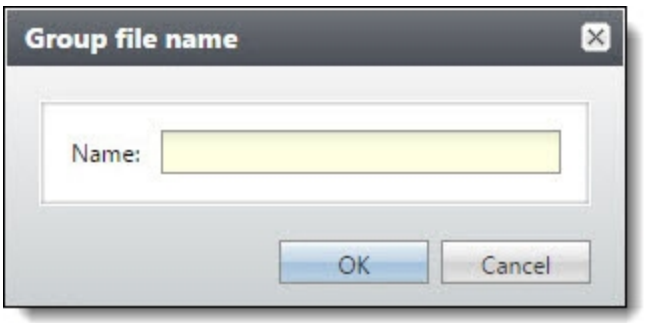
After you run an invitation process for an event, you can download its output into grouped files based on the information in the output. For example, you can download the mailing information into multiple files based on region, with the information grouped based on the states where the recipients reside. When you download the output, the comma-separated value (*.csv) files generate at a location you specify.

Download the output into grouped files

1. Select the instance of the invitation process with the output to download.
   - On the invitee list page of the process, select the Invitation History tab. Under **History**, click the down arrows next to the instance to download.
   - On the status page of the process, select the Recent status tab to download output for the most recent instance.
2. Select the export definition to download.
3. On the action bar, click **Download output** and select **Grouped files**. The Download grouped files screen appears.



4. In the **Group by** field, select the output field to generate grouped files. For example, to group information based on the states where the recipients reside, select to group by state.
5. In the **Export Format** field, click the down arrow and select the format of your export.
6. Under **Group options**, create each group of information to download.
   a. In the box on the left, select the items to include in the group. For example, to group recipients by state into regions, select the states to include in the region group.
   b. Click the right arrow. The Group file name screen appears.



   c. Enter the name of the grouped file.

d. Click **OK**. You return to the Download grouped files screen. In the box on the right, the new group appears. To expand the group to see the items it includes, click the plus sign.

7. After you create all the groups, click **Download**. The output files download at the designated output path. When the download finishes, a message appears to ask whether to open the output path.
8. To open the output path to open the output files, click **Yes**. To return to the process status page, click **No**.

Generate Microsoft Word Documents for an Invitation

When you associate a Microsoft *Word* letter template with a package, you can generate the letter output for an event invitation that uses the package. When you generate the output, the data fields merge with the documents generated in *Word*. From the status page of the invitation process, you can generate *Word* documents for the most recent instance or a previous instance of the process.

Generate Microsoft *Word* documents for an invitation

1. Select the instance of the invitation process with the output to generate.
   - On the invitee list page of the process, select the Invitation History tab. Under **History**, select the instance to download.
   - On the status page of the process, select the Recent status tab to generate output for the most recent instance.
2. Click **Merge letter**. The program merges the data fields and document file selected for the process and opens the merged documents in *Word*.
3. In Microsoft *Word*, save the merged documents on your workstation or network.

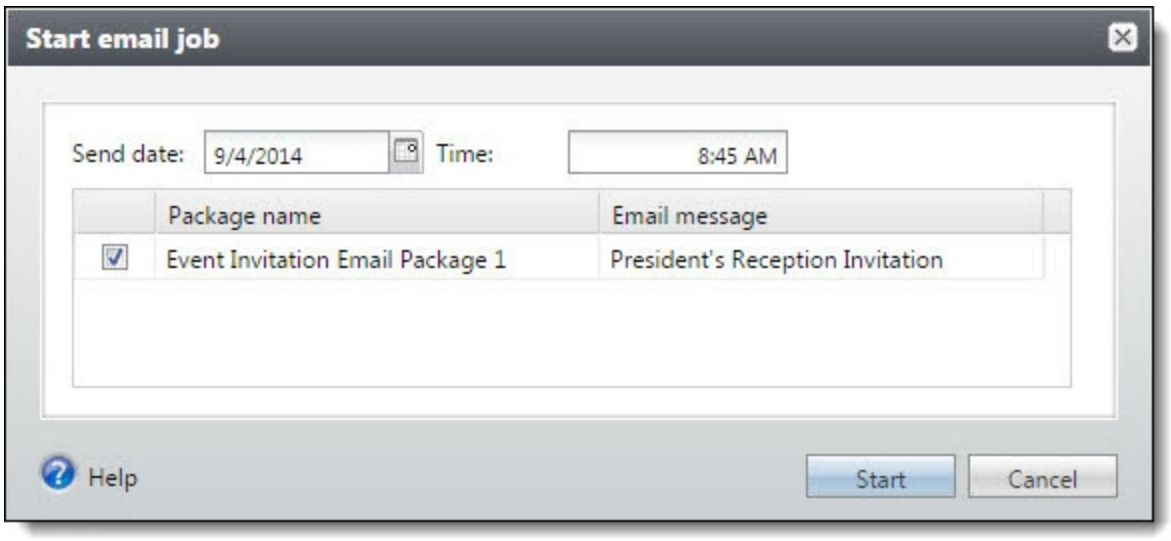
Start an Email Job for an Invitation

After you run an invitation process with an email package that includes a ***Blackbaud Internet Solutions*** export definition, the process status page displays the email job options. When you start an email job, the Blackbaud Internet Solutions Service puts the job in the queue and processes it at the scheduled time. To create the final email messages, the Blackbaud Internet Solutions Service merges data from the export definition into the appropriate fields in the email messages. The web services send the merged email messages to the Blackbaud Internet Solutions Services server, where they are processed and submitted to a Mail Transfer Agent (MTA) server for delivery.

Send email messages

1. Select the instance of the invitation process with the output to download.
   - On the invitee list page of the process, select the Invitation History tab. Under **History**, select the instance to download.
   - On the status page of the process, select the Recent status tab to send output for the most recent instance. To send output for a previous instance, on the History tab, select the instance to send, and click **Show Details** on the action bar.

2. Select the export definition to send.
3. On the action bar, click **Start email job**. The Start email job screen appears.



4. In the **Send date** and **Time** fields, enter the date and time to start the email job.
5. Select the packages to include in the email job.
6. To return to the process status page, click **Start**.

Note: As the job processes, the **Status** column changes from Pending to Completed or Failed. To view the most recent job status, click **Refresh**. To view information about the email job, select the job and click **View email job status detail**.

Invitation Processes

You establish invitation processes for particular invitations you create. For example, you can create a process for save-the-date cards and save the settings you select. Each time you need to send save-the-date cards, you can run the save-the-date process again.

Note: If you want to get an accurate count of invitees for events, you must use the Event Summary node in Query. Incorrect counts can exist elsewhere when constituents were invited to the same event using multiple Invitation Processes.

Recent Status

On the Recent Status tab, you view the details of the most recent invitation process. These details include the status of the process; the start time, end time, and duration of the process; the person who last started the process; the name of the server most recently used to process the invitations; the total number of invitations processed; and how many invitations processed successfully and how many were exceptions.

You can download the output of the most recent instance of the process. You can also generate the output for the most recent instance of the process in Microsoft *Word*.

For an invitation with an email package that includes a ***Blackbaud Internet Solutions*** export definition, the process page also provides options to manage the email job.

History

On the History tab, you view a list of all processes for an invitation. The details in the **History** grid include the status of the process; the start time, end time, and duration of the process; the person who last started the process; and the name of the server most recently use to process the invitations. This information generates each time you run an invitation process. Therefore, it is likely you have multiple rows of information in this grid.

To view additional information about an instance, click the down arrow next to the name of the invitation process in the grid. In the details window, you can view information about the export definitions included in an instance. From the details window, you can download the output of an instance of the process. From the History tab, you can also delete the status record of a specific instance of the process.

Delete Invitation Process History

After you run an invitation process, you can delete the process history as needed. On the History tab of the invitation process page, in the **Invitation List** grid, you can select a status record to delete from the history.

Delete invitation process history

1. From an event, select the Invitations tab.
2. Select the invitation to view the invitee list page.
3. Select the Invitation History tab and click **Go to [invitation process]** under **Tasks** on the explorer bar. The Invitation List page appears.
4. Select the History tab.
5. Click the arrows next to the process status to delete and click **Delete** on the action bar. A confirmation message appears confirming you want to delete the process status record.
6. To delete the status record, click **Yes**.

Job Schedules Tab

On the Job Schedules tab, you view a list of all automatic jobs for an invitation process. The details in the grid include the job name and frequency; the start time, end time, and duration of the job; and the dates the job schedule was added and changed. On this tab, you can add, edit, and delete job schedules.

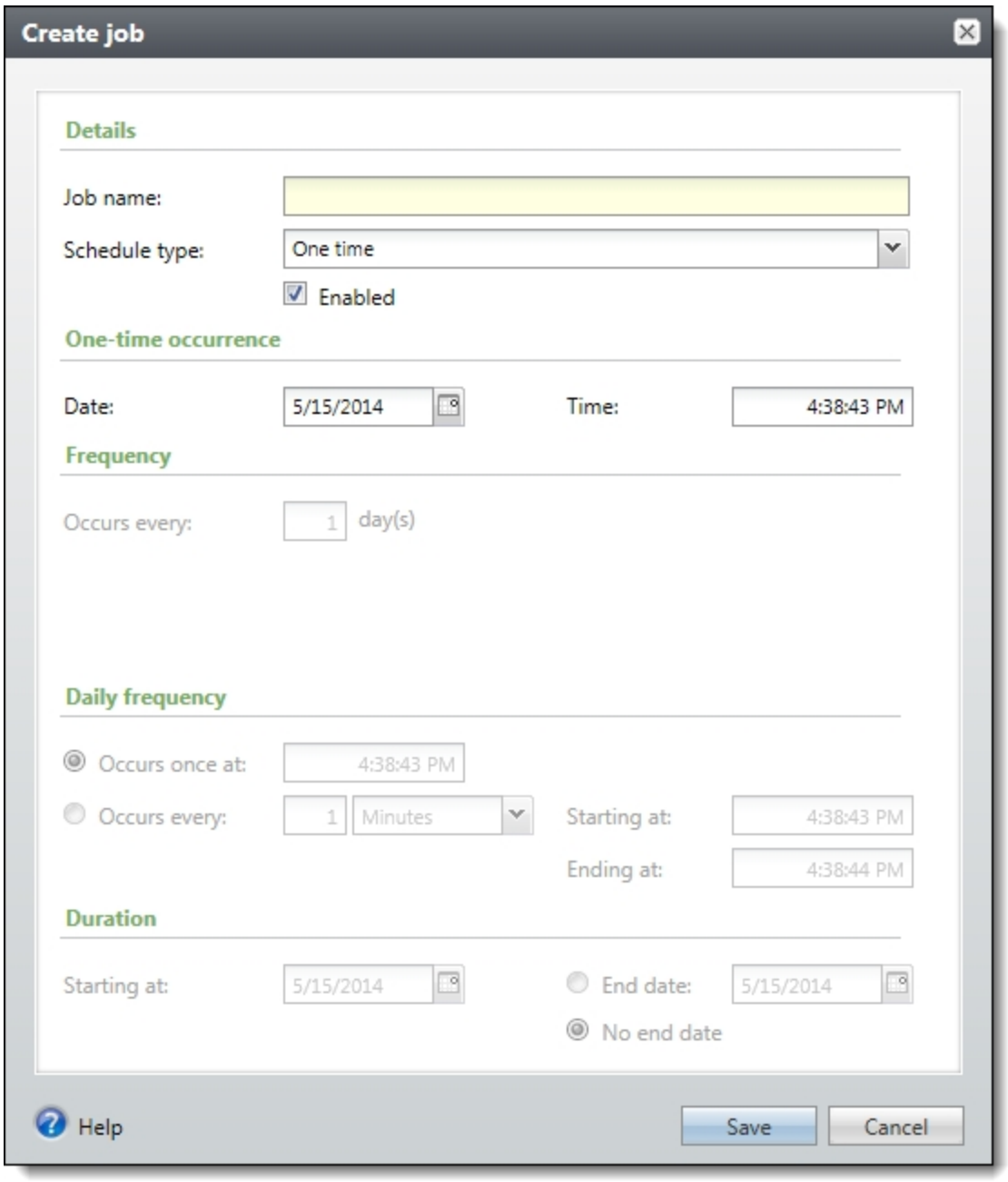
Note: Job schedules are normally handled by the system administrator at your organization.

Create Job Schedules

Use a job schedule to run a process and unattended. When you create a job schedule, you specify the frequency and scheduled time of the occurrence. Using the job schedule and *SQL Server*, the process runs at the scheduled time and interval.

Create a job schedule

1. On the Job schedules tab of the process, click **Add**. The Create job screen appears.



2. In the **Job name** field, enter a name for the scheduled process.
3. By default, the schedule is active. To suspend it, clear the **Enabled** checkbox.
4. In the **Schedule type** field, select how often to run the process. You can run a process once; on a daily, weekly, or monthly basis; whenever *SQL Server Agent* service starts; or whenever the computer is idle according to *SQL Server Agent*. Your selection determines which other fields are enabled.
    a. For a process that runs once, select the date and time to run it.
    b. For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the **Occurs every** field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it. For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs.
    c. For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select **No end date**.
5. To return to the Job schedules tab, click **Save**.

Create Job Screen

Screen Item	Description
Job name	Enter a name for the job schedule.
Schedule type	Select how often to run the job schedule. You can run a process once; on a daily, weekly, or monthly basis; whenever *SQL Server Agent* service starts; or whenever the computer is idle according to *SQL Server Agent*.
Enabled	By default, the scheduled process is active. To suspend the process, clear this checkbox.
One-time occurrence	For a process that runs once, select the date and time to run it.
Frequency	For a process that runs on a daily, weekly, or monthly basis, select the number of days, weeks, or months between instances in the **Occurs every** field. For a weekly process, select the day of the week to run it. For a monthly process, select the day of the month to run it.
Daily frequency	For a process that runs on a daily, weekly, or monthly basis, select whether to run it a single time or at regular intervals on the days when it runs. To run a process once, select **Occurs once at** and enter the start time. To run a process at intervals, select **Occurs every** and enter the time between instances, as well as a start time and end time.
Start date	For a process that runs on a daily, weekly, or monthly basis, select a start date and, if necessary, an end date. To run the process indefinitely, select **No end date**.

Edit Job Schedules

After you create a job schedule for a process, you can update it. For example, you can adjust its frequency. You cannot edit the package to create the job schedule. To edit a job, select it and click **Edit**.

Edit a job schedule

1. On the Job schedules tab, select a job and click **Edit**. The Edit job screen appears. The options on this screen are the same as the Create job screen. For information about these options, refer to Create Job Screen on page 147.
2. Make changes as necessary. For example, in the **Schedule type** you can change how often to run the process.
3. Click **Save**. You return to the Job schedules tab.

Delete Job Schedules

On the Job schedules tab of the status page, you can delete a job schedule of the process. This deletes the scheduled job as well as changes made to it outside the program. To delete a job schedule, select it and click **Delete**.

Delete a job schedule

1. On the Job schedules tab, select the job and click **Delete**. A confirmation screen appears.
2. Click **Yes**. You return to the Job schedules tab.

Event Reports

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Event Profile Report

With the Event Profile report, you can view information about an event, such as its coordinators, location, seating, expenses, and more. The Event Profile report also includes information about event registrants, such as date registered, host, and balance.

View an event profile report

1. On an event record, click **Event profile** under **Reports**. The Event Profile report page appears.

Note: To view the Event Profile report from *Events*, click **Event profile** under **Reports** and search for and select the event to generate its report. To view the report from *Analysis*, click **Event reports** and **Event profile**, and search for and select the event to generate the report.

2. In the **Event** field, select the event to view information.

Note: The invited count in the **Event Details** section of this report is based on the number of invitees in the Invitee list of the event's Invitations tab.

3. In the **Show sections** field, select the types of information to display in the report.

Tip: When you select **Event details**, the report displays detail information about the event and its registrants, including the number of constituents that were invited to the event but did not register. To display a list of the constituents that did not respond to an invitation, select **Did not respond**. From this list, you can open the record of a constituent who did not respond.

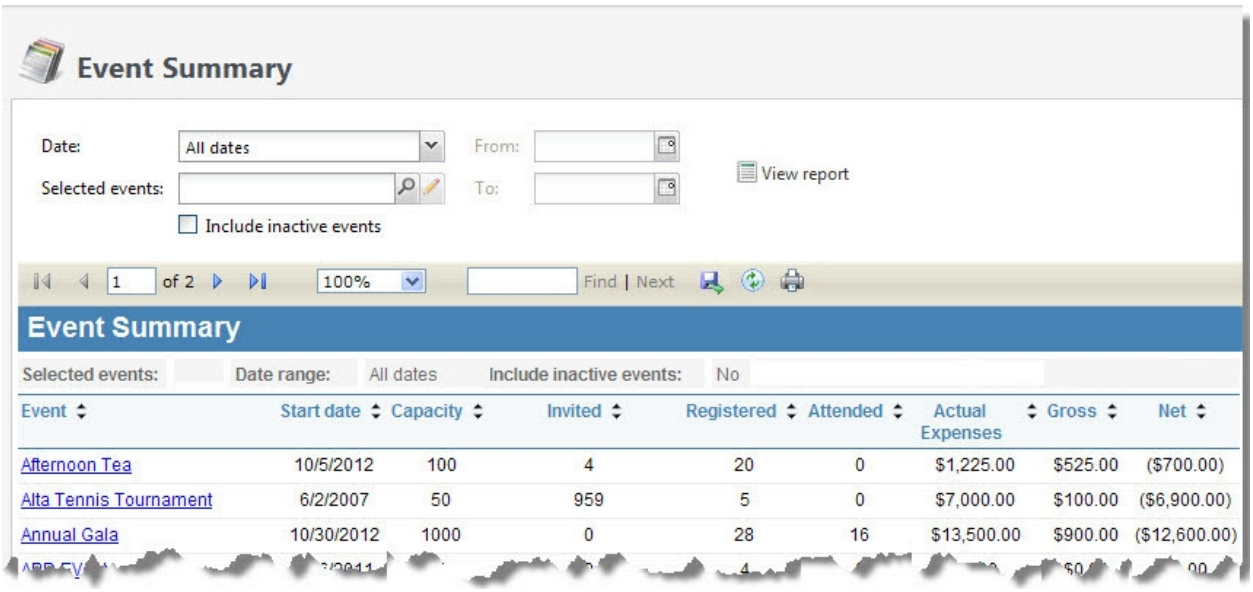
4. Click **View Report**. The Event Profile report generates and displays the information.

Event Summary Report

With the Event Summary report, you can view information about multiple events, based on a selection, along with the event details. The Event Summary Report includes information about the event such as the start date, how many people were invited/registered/attended, event income and expense information, and more.

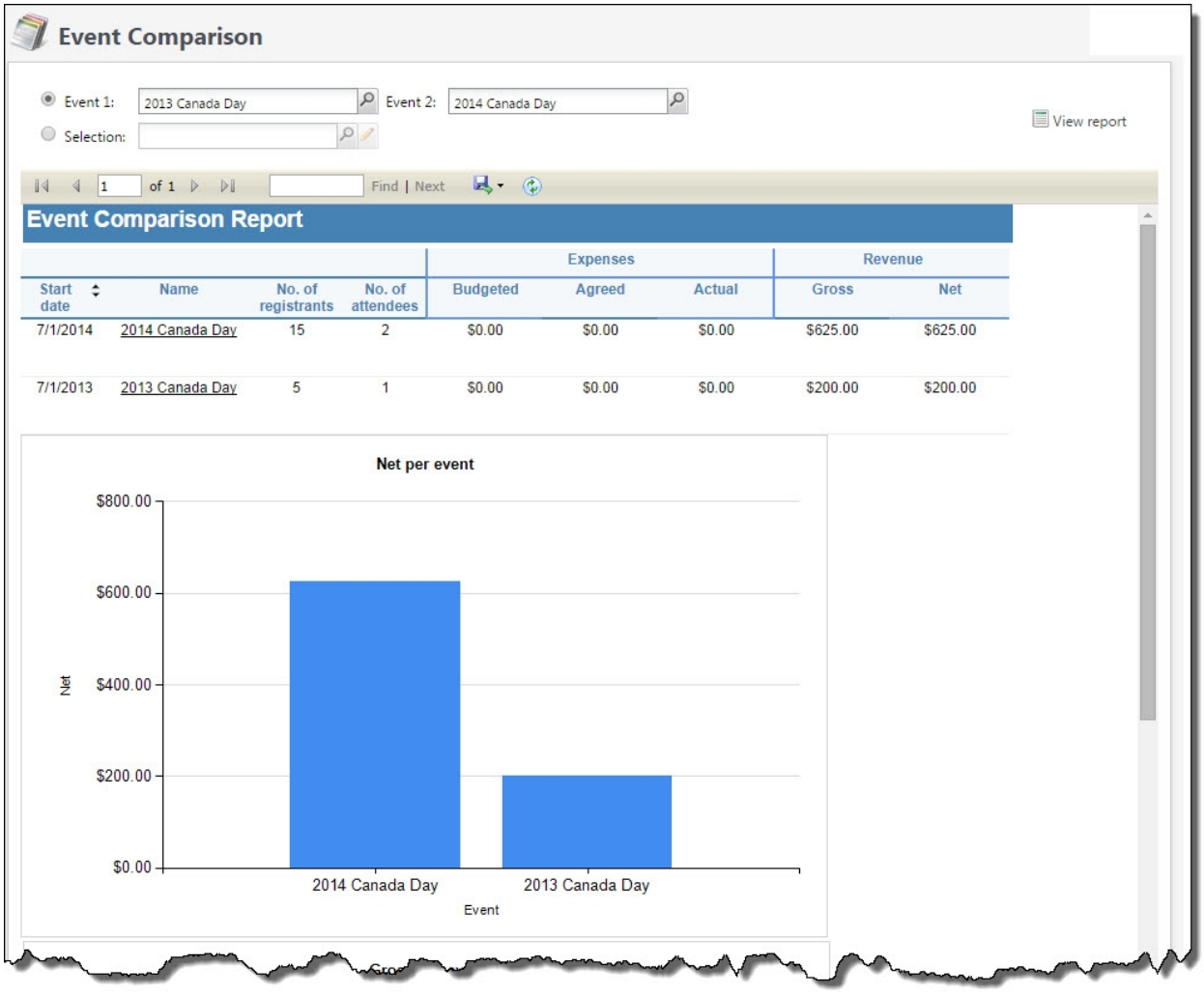
View an event summary report

1. From *Reports*, select Event reports.
2. Click **Event summary**. The Event Summary Report page appears.
3. At the top of the page, click the magnifying glass to pick a selection of events to include. You can also select a date range and whether or not to include information about inactive events.
4. To view the report, click the refresh button. The Event Summary with the selected information appears.



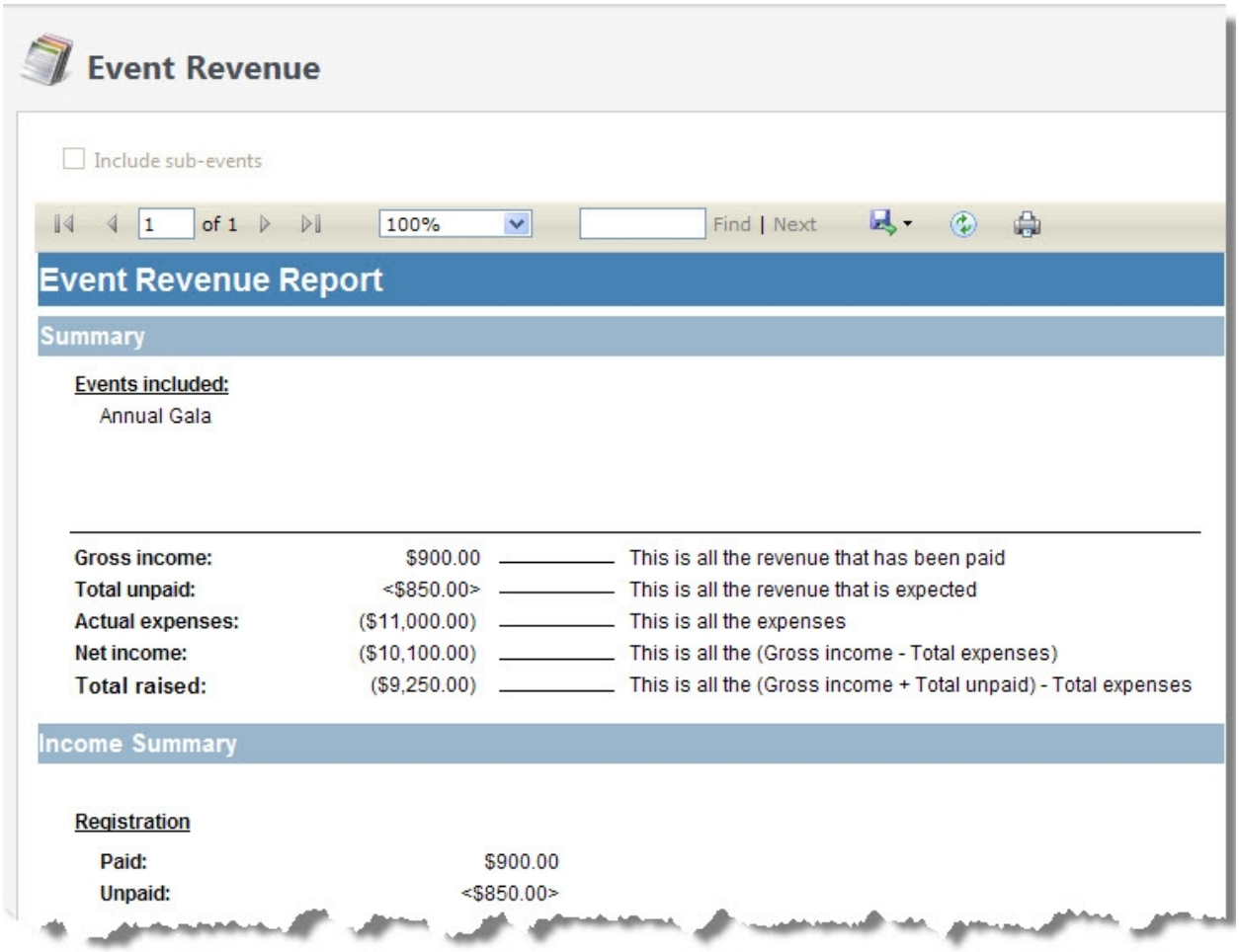
Event Comparison Report

The Event Comparison report compares the effectiveness of multiple events. For example, you can use this report to compare the effectiveness of an annual event over consecutive years. To open the Event Comparison report from *Events*, click **Event comparison** under **Reports**. The Event Comparison report page appears.



To run the report, select two events or a selection of multiple events to compare and click **View Report**. The report compares the performance of the selected events and displays the number of registrants and attendees, expenses, and the gross and net amounts raised for each event.

You can print the report or export it in different formats.

Event Revenue Report

The Event Revenue report shows a breakdown and comparison of revenue and expenses for the event. For multi-level events, the report can display information for only the event or for the event and sub-events. To open the Event Revenue report, go to an event and click **Event revenue** under **Reports**. The Event Revenue report page appears.