

The Raiser's Edge™

Event Management Data Entry Guide

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What Is In This Guide?

In the *Event Management Data Entry Guide*, you learn how to manage all aspects of your organization's events. You learn how to set up an event record by using the General, Prices, Expenses, Jobs, Actions, Attributes, Media, and Notes tabs of the event record. You also learn how to add participants to your event record by using the Participants tab. You can also learn about the following:

- "Class Schedules" on page 30
- "Event Seating" on page 39
- "Dinner Menu Items" on page 102
- "Event Awards" on page 103
- "Name Tags and Place Cards" on page 149
- "Set Up Seating on the Participant Record" on page 151
- "Lodging and Travel Information" on page 158
- "Update Participants" on page 193
- "Calendar of Events" on page 196
- "Events Tab of a Constituent Record" on page 205

How Do I Use These Guides?

The Raiser's Edge user guides contain examples, scenarios, procedures, graphics, and conceptual information. To find help quickly and easily, you can access the **Raiser's Edge** documentation from several places.

User Guides. You can access PDF versions of the guides by selecting **Help, User Guides** from the shell menu bar or by clicking **Help** on the Raiser's Edge bar in the program. You can also access the guides on our Web site at www.blackbaud.com. From the menu bar, select **Support, User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

Help File. In addition to user guides, you can learn about **The Raiser's Edge** by accessing the help file in the program. Select **Help, The Raiser's Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

Narrow your search in the help file by enclosing your search in quotation marks on the Search tab. For example, instead of entering Load Defaults, enter "Load Defaults". The help file searches for the complete phrase in quotes instead of individual words.

Event Management

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The optional module *Event Management* works with **The Raiser's Edge** to help you manage all aspects of your events. Whether you organize a tennis tournament, an awards banquet, a trustee luncheon, a training class for your volunteers, a holiday party, or homecoming activities, the information you need — from prices and expenses, to income generated, to participants — is kept in one package.

The optional module *Event Management* is divided into two major parts. The first aspect involves setting up an event record and encompasses the General, Prices, Expenses, Jobs (when you use *Volunteer Management*), Actions, Attributes, Media, and Notes tabs of the event record. The second part involves adding participants and setting up their participant records on the Participants tab of the same event record.

The screenshot shows the 'Walk-A-Thon' software window. The 'General' tab is selected, showing fields for Name (Walk-A-Thon), ID (WALK), Category (Sporting event), Description (This is a 5 kilometer walk that begins and ends at the International Conference Center. There will be a closing ceremony concert performed by the Jazz Sons. Proceeds from this year's walk-a-thon are designated for Disaster Relief.), Type (Fundraiser), Group (Disaster Relief Fundraising Events), Campaign (Disaster Relief Campaign), Event goal (\$250,000.00), Itinerary desc (Nashville Walk-A-Thon), Capacity (5000), No. invited (10000), Start date (07/31/2007), Start time (7:00 AM), End date (07/31/2007), End time (4:00 PM), Coordinators (Allison E. Andrews), Location (International Conference Center), and Seating (Seating has not been set up for this event). The bottom status bar shows No. Participants: 5000, No. Registered: 500, and No. Attended: 0.

When you set up an event, you must first designate a category of **Sporting Event**, **Dinner**, **Class**, or **Other** on the General tab. On the General tab, you then track detailed information such as a description of the event; the event type; whether the event is part of a larger group, or series of events; the campaign associated with the event; an event goal; the start and end times; start and end dates; coordinator(s); class instructor(s); and event location. On this tab, you can also set up seating arrangements for the event and assign participants to seats, individually and in groups. From the **Event** menu, you can establish menu items for a dinner event, and set up awards for any category of event.

On the Prices tab, you set up registration fee prices for the event, which you later use when you add participants. You can also set up benefits you give to participants for each level (unit) of pricing. On the Expenses tab, you track expenses incurred from hosting the event. When you use *Volunteer Management*, the Jobs tab appears so you can track your event volunteers and assign them to particular event jobs. On an event record, tabs also appear for attributes, actions, media objects, and notes.

One of the biggest aspects of the optional module *Event Management* is the Participants tab.

Name	Participation	Status	Registration	Attended
Dynamic Engineering	Corporate Sp...	Paid	Do not register	<input type="checkbox"/>
Davenport Creamery	Corporate Sp...	Paid	Do not register	<input type="checkbox"/>
The Flower Patch	Vendor	Will bill us	Do not register	<input type="checkbox"/>
Mark D. Adamson	Player	Paid	Registered	<input type="checkbox"/>
Timothy D. Billings	Player	Paid	Registered	<input type="checkbox"/>
Jason D. Campbell	Player	Paid	Registered	<input type="checkbox"/>
Ryan K. Dorrior	Player	Paid	Registered	<input type="checkbox"/>
Susan E. McDonald	Player	Paid	Registered	<input type="checkbox"/>
Orla McGrann	Player	Paid	Registered	<input type="checkbox"/>

No. Participants: 120 No. Registered: 120 No. Attended: 0

Participants are divided into three types — registrants, guests, and sponsors. On the Participants tab of an event record, you can add new registrants, guests, or sponsors; or open these records to view or edit, if you have rights established from the **Security** link of *Administration*. Each registrant, guest, and sponsor record contains a series of tabs.

Registrant: Richard F. Smith

Registered Events: Summer Series of Fun

- Alta Tennis Tournament
- Afternoon Tea
- Starlight Concert
- Annual Golf Tourna...

General | Travel | Registration Fees | Participation | Donations | Sponsoring Pledges | Attributes/Notes

Solicitor: David B. Murphy Invite?: Invited 05/15/2006

Participation: Captain Response: Accepted 06/01/2006

Status: Paid Registration: Registered 06/01/2006

Seating: Seating Seat: Not yet assigned Seating Group: 02

☐ Do not seat this Participant Group/seating notes:

Sponsored by: Bottling Unlimited ☐ Participant has attended
☒ Participant is a coordinator

More Info... Awards Tags/Cards ☒ Guests

Sporting Event

On the General tab, you track your participant's name and click the ellipsis to go to or add the address, and phone numbers. You can designate how a registrant, guest, or sponsor participates in the event, the solicitor who convinced him to participate, and who sponsors him in the event, if applicable. You can track if the participant is invited, when you sent the invitation, when the participant responded, and when the participant officially registered. You can set up seating arrangements for the event, if you have not already done so on the General tab of the event record. Here, you can add a participant to a seating group, add group and seating notes for the participant, and assign the participant to a seat, individually or in a group. On the General tab, you can also track additional sporting information for a participant of a sporting event or select a dinner preference for a participant of a dinner event. You can also track awards presented to any participant and set up name tags and place cards.

Warning: If you use the **New Registration for Grouped Event** feature and register a participant for multiple events at once, you will not use the Registration Fees tab. You establish your registration fees when you use the wizard. For information about how to register a participant to multiple events, see "Grouped Event Participant Registration" on page 212.

On the Travel tab, you can track travel and lodging arrangements. On the Registration Fees tab, you calculate registration fees for the participant, including or excluding discounts, and you can link gifts in your database to pay the registration fees. On the Participation tab, you track the special ways a registrant, guest, or sponsor is participating — as a speaker, vendor, or volunteer. If a participant is a volunteer, and you use *Volunteer Management*, you can assign a volunteer to event jobs from this tab. On the Donations tab, you can also track donations given to an event, other than registration fees, and add new gifts. On the Sponsoring Pledges tab of a sporting event record, you can track the donations made on behalf of the participants of the sporting event. On a participant record, tabs also appear for attributes and notes.

Frequently Used Terms

This section defines words and phrases you need to know as you work with the optional module *Event Management*. If you come across an unfamiliar term when you read this or any chapter in *The Raiser's Edge* documentation, make sure you check the online glossary in the help file.

Action. An action is a specific step you take to secure a donation from a constituent. It is a way for you to track the communications you make about your event, as well as the tasks associated with these communications. To add phone calls, meetings, mailings, email, tasks, and any other types of actions, click **New Action** on the action bar on the Actions tab.

Annotation. An annotation is a quick reminder type of note added to an event record or a constituent record. An annotation lets each user who opens the record know something important about the record, such as "Treat this constituent with care. She is a large donor." or "Please see Dana Cone before editing this event record."

Benefit. A benefit is a gift your organization gives to the participants of an event when they donate a certain amount of money. You can set up default benefits for each unit (level) of registration fee prices on the Prices tab of an event record. For example, if you host a golf tournament, you may give out a golf cap to individual players, a T-shirt to those who participate as a team, and a \$25 pro shop gift certificate to your hole-in-one sponsors.

Category. A category establishes the type of event. The four categories are **Sporting event**, **Dinner**, **Class** and **Other**. The category determines the fields that appear on the event and participant records.

Coordinator. A coordinator is a person who oversees an event and makes sure all areas of the event run smoothly in the planning stages and at the event itself. An event can have multiple coordinators. You should enter a coordinator into your database as a participant (registrant, guest, or sponsor) on the Participants tab of an event record. On the bottom of the participant record, you must mark **Participant is a coordinator**.

Data file. A data file is the file that contains the actual information extracted from your database. For example, if your output fields are **First Name** and **Last Name**, your data file contains all the first and last names found in your database (John Doe, Mary Smith, etc.).

Group. A group specifies a series of related events. For example, your organization holds three training classes for new volunteers during the summer. Although each training class has a unique name, you group the three classes together with the common name, “Summer Volunteer Training.” You enter the common name in the **Group** field on the General tab of the event record. To use the Grouped Event Registration wizard, you must select a group in this field.

Grouped Event Registration Wizard. With the Grouped Event Registration Wizard, you can easily register a participant for multiple functions within a grouped event at once. For information about this wizard, see “Multiple Registration for Grouped Events” on page 211.

Instructor. An instructor is a person who teaches a class. For example, your organization holds its summer CPR class. Ruth Taylor, a medical professional from your community, teaches the class. Ruth is the instructor and you should enter her as a participant (registrant, guest, or sponsor) on the Participants tab of the Summer CPR event record. On the bottom of the participant record, you must mark **Participant is an instructor**.

Job. An event job is a task, or specialized piece of work, assigned to a volunteer of an event. For example, your conservation organization hosts a walk-a-thon to raise money for your Save the Beaches campaign. Before the event, you need volunteers to help make plans. You need volunteers to make phone calls to ask participants from last year’s walk-a-thon if they would like to participate this year and other volunteers to work on letters you send to potentially new participants. You also need volunteers to work with the promotions committee to deliver brochures and flyers to people in the surrounding area. All these tasks are your event jobs. Before you assign any of these jobs to your volunteers, you must add job records to your database and link each job to the walk-a-thon event record. You can add event job records to your database only when you use the optional module *Volunteer Management*.

Other donation. An other donation is a gift, other than a registration fee, given to an event. For example, Bill Walker, decides to donate \$1,000 to your annual silent auction. He will not participate in or attend your event. He just believes in your cause and wants to donate some money. Other donations can come only from constituents in your database. You can link gifts as other donations on the Donations tab of a participant record.

Participant. A participant is an individual or organization associated with an event. A participant can be a registrant, guest, or sponsor. All your volunteers, vendors, speakers, coordinators, and instructors are also considered participants and you must enter each as a registrant, guest, or sponsor. You should enter anyone associated with an event as a participant, but a participant does not have to actually take part in the event. An example of this situation is if you host a Holiday Ball and hire a catering service. The catering service attends the event as a necessary element to supply the food, but does not take part in the ball itself. You must add the catering service as a participant so you can track the expenses you pay them. Another example is if you hold a golf tournament and invite a golf celebrity to be the guest speaker. Even though the celebrity does not play golf in the tournament, you must add him as a participant so you can track him as a speaker for the event.

- **Registrant**

A registrant is an individual or organization that attends an event or provides a service or product for an event. A registrant may or may not actually take part in the event. For example, you give a CPR class. You enter students of the CPR class as registrants because they actively participate by paying registration fees and taking the class. As registrants, you can track their names, addresses, attendance, registration fees, seating arrangements, and other important information. For the same CPR class, you invite a local doctor to give a speech on strokes. The doctor is a guest speaker but does not actively take the class as a student. You must enter the doctor in your database as a registrant so you can track him as a speaker for the event and track any expenses you pay for his services.

- **Guest**

A guest is an individual or organization that attends an event as an invitee (guest) of a registrant. For example, you enter Jane Cothran as a registrant of your organization’s golf tournament. Jane brings a friend, George Cone. You enter George Cone in your database as a guest for the golf tournament. On the General 1 tab of George’s guest record, you enter Jane Cothran in the **Guest of** field because George is Jane’s guest.

- **Sponsor**

A sponsor can be an individual or organization that sponsors, or represents, a registrant or group of registrants. For example, your organization holds a tennis tournament. Southern Corporation sponsors a team to play in the tournament. In this example, Southern Corporation represents the team and pays the registration fee for each player. You enter Southern Corporation as a sponsor. You enter the individual players as individual registrants. In the **Sponsored by** field on the General 1 tab of each registrant record, you enter "Southern Corporation".

Registration fee. A registration fee is an amount of money your organization charges for a level (or unit) of participation in an event. For example, if you host a Holiday Ball, you can have two units of registrations fees, one for couples and one for singles. If you host a golf tournament, you can have several units such as a single, a foursome, or a hole sponsor. When you set up an event where you charge registration fees, you must establish prices. Later, when you add participants to the event, the program uses these prices to calculate their registration fees. Only the prices you add on the Prices tab of the event record can be specified on the participant (registrant, guest, or sponsor) records when you add participants.

Speaker. A speaker is a participant who gives a speech at an event. You must enter speakers as a registrant, guest, or sponsor of the event and designate them as a speaker on the Participation tab of the registrant, guest, or sponsor record. For example, you hold a Health Awareness class and a local physician talks to your class about heart disease. The doctor is your event's speaker.

Sponsoring pledge. A sponsoring pledge is a donation made on behalf of a registrant, guest, or sponsor who participates in a sporting event. For example, your organization holds a walk-a-thon for breast cancer awareness. All proceeds go to breast cancer research. The participants of your event ask as many people as possible to donate a certain amount of money if they complete the walk. Another example is when your organization holds its annual golf tournament. Dynamic Engineering, a sponsor of your tournament, asks each employee to donate a certain amount of money for each participant who plays on Dynamic Engineering's team. These sponsoring pledges bring in extra donations for the tournament. You must enter the donors of sponsoring pledges as constituents in your database. You track sponsoring pledges on the Sponsoring Pledges tab of a participant record.

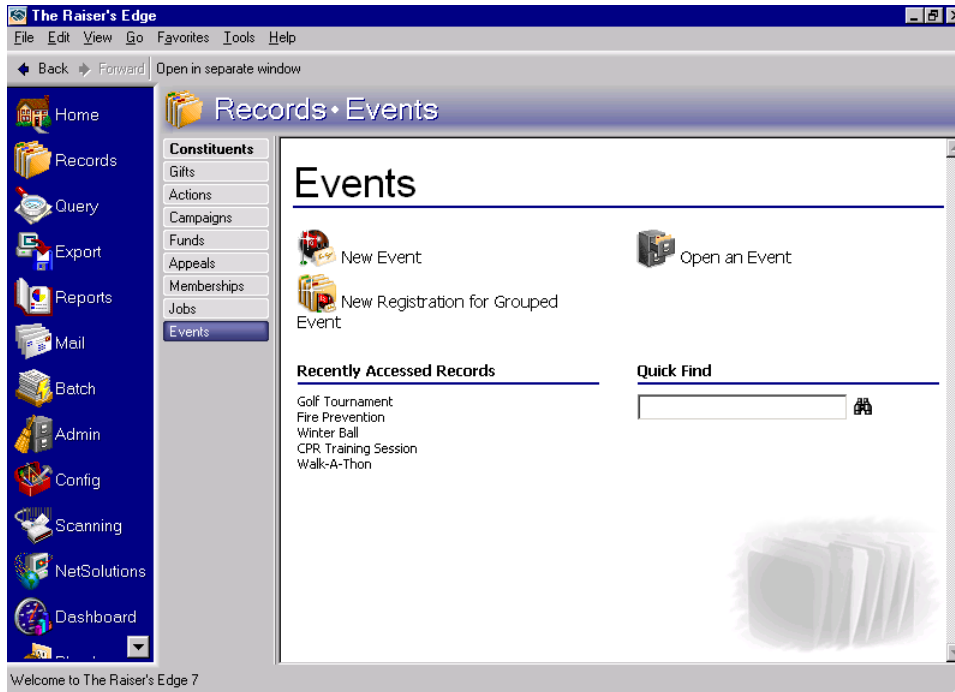
Vendor. A vendor is an individual or organization that provides a service or product for an event. For example, you host a dinner event and hire a catering service. The catering service is the vendor. You can enter vendors into your database as registrants, guests, or sponsors.

Volunteer. A volunteer is a person who voluntarily undertakes a task, or a specialized piece of work, for your organization or your organization's events and expects no pay in return. For example, your organization is a museum and you host an opening party for your new wing. Two people from the community volunteer to serve as greeters at the door the night of the party. You hold a Spring Gala. Several members of the community voluntarily help plan the gala. Others help decorate, send out invitations, and hire entertainment. All these people are your volunteers.

In the optional module *Event Management*, you can enter a volunteer as a registrant, guest, or sponsor. A volunteer may or may not be assigned to jobs at an event. You may have a volunteer who attends an event but does not work at that particular event. If a volunteer works at an event, you can designate how he participates on the Participation tab of his registrant, guest, or sponsor record. To designate a participant as a volunteer, the participant must be an individual constituent in your database and active as a volunteer. When you enter information on the Volunteer tab of a participant's constituent record, the participant becomes active in *The Raiser's Edge* as a volunteer for your organization. The Volunteer tab appears on a constituent record only when you use the optional module *Volunteer Management*. Therefore, you can indicate that a participant is a volunteer, only if you use *Volunteer Management*.

Navigate in Event Management

From the Events page, you can add a new event record or open an existing event record. To register a participant to grouped events from the Events page, you can click **New Registration for Grouped Event**. This comes in handy when you have a function that encompasses multiple events such as a conference or homecoming weekend at a university. To access the Events page, click **Records** on the Raiser's Edge bar, then click **Events**.



Tip: To view recently accessed event records, you can also select **File, Recently Accessed Events** from the menu bar of an event record.

As you add or open event records, these events appear on the Events page in a list of recently accessed records. To open any event record in this list, click the event name. To quickly search for a record, you can enter the event name (or part of the name) in the **Quick Find** field and click the binoculars. When the program finds more than one match, the Open screen appears and lists the events. When your entry in the **Quick Find** field matches a single record, the record opens. When the program finds no match for your entry, the Open screen appears so you can create a more detailed search.

Access an Event Record

Tip: You can use shortcut keys to move around *The Raiser's Edge* without your mouse. For example, press **CTRL + S** on your keyboard to save a record.

When we use the term “accessing” an event record, we talk about opening an existing record. Every event you enter into *The Raiser's Edge* database has a separate event record. Once an event record is in the database, you can open the record from the shell **File** menu, from the **File** menu of an existing event record, and from the Events page of *Records*. We recommend you open records from *Records* because it allows the easiest and most complete access to all record types.

For information about how to find and open records in *The Raiser's Edge*, see the *Program Basics Guide*.

► Open an event record

This procedure tells you how to quickly open, or access, an event record from the Events page of *Records*. For information about how to add an event record, see “Set Up an Event” on page 19.

1. On the Raiser’s Edge bar, click **Records**.
2. Click **Events**. The Events page appears.

Note: On the Open screen, if the criteria fields do not provide enough search criteria options, use the **Search using query** field to further filter your results. For information about how to use this field, see the *Program Basics Guide*.

3. Click **Open an Event**. The Open screen for Events appears.

The screenshot shows a software window titled "Open". At the top, there is a "Find:" dropdown menu currently showing "Event", followed by a "Search using query:" text field containing "<Default>" and a small magnifying glass icon. Below this is a large empty rectangular area. To the right of this area is a vertical stack of buttons: "Open", "Cancel", "Add New" (with a star icon), "Options", "Find Now" (with a magnifying glass icon), "New Search", and "Expand Results" (with a magnifying glass icon). At the bottom of the window, there is a section titled "Find Events that meet these criteria:". This section contains six dropdown menus arranged in two columns: "Event Name:", "Event ID:", "Event Category:", "Event Group:", "Event Type:", and "Event Location:". Below these dropdowns are two checkboxes: "Display Inactive Events" and "Exact match only".

Warning: We recommend you search by only one or two of the most helpful criteria types because the results that appear in the grid must match all criteria you enter. Too much criteria information in the **Find Events that meet these criteria** fields can actually prevent you from finding the event.

4. Under **Find Events that meet these criteria**, decide what criteria to use to search for your event and select the information in the appropriate criteria fields. The criteria you can use include the **Event Name**, **Event ID**, **Event Category**, **Event Group**, **Event Type**, and **Event Location**.

The 'Open' window displays search criteria fields. At the top, there is a 'Find:' dropdown set to 'Event' and a 'Search using query:' field set to '<Default>'. Below these are several buttons: 'Open', 'Cancel', 'Add New', 'Options', 'Find Now', 'New Search', and 'Expand Results'. The main section, 'Find Events that meet these criteria:', contains dropdown menus for 'Event Name' (set to 'Afternoon Tea'), 'Event ID', 'Event Category' (set to 'Dinner'), 'Event Group', 'Event Type', and 'Event Location'. There are also checkboxes for 'Display Inactive Events' and 'Exact match only'.

Note: You can enter the first few letters or characters in the **Find Events that meet these criteria** fields if you do not know the correct spelling or number. For information about how to use these fields, see the *Program Basics Guide*.

5. Click **Find Now**. If the search criteria entered matches an event in the database, it appears in the grid on the Open screen. Depending on how limited or detailed your criteria are, the program may find one record or many.

The 'Open' window now displays search results. A table with the following columns is shown: Name, Eventid, Event Category, Event Group, and Event Type. The first row of data is: Afternoon Tea, Afternoon Tea, Dinner, Summer Series of Fun. Below the table, the same search criteria fields as in the previous screenshot are visible. At the bottom left, it says '1 record found.' The 'Find Now' button is highlighted.

Name	Eventid	Event Category	Event Group	Event Type
Afternoon Tea	Afternoon Tea	Dinner	Summer Series of Fun	

6. In the grid, select the event record to open.

Tip: You can use shortcut keys to move around *The Raiser's Edge* without your mouse. For example, press **CTRL + L** on your keyboard to save and close a record.

7. Click **Open**. The event record appears.

The screenshot shows a software window titled "Afternoon Tea". It has a menu bar (File, Edit, View, Event, Favorites, Tools, Help) and a toolbar with icons for Save and Close, Print, Find, and navigation. Below the toolbar are tabs for Participants, Actions, Attributes, Media, and Notes. The main form area contains fields for Name (Afternoon Tea), ID (Afternoon Tea), Category (Dinner), Description (We will be meeting at the Playground Site for a brief meeting and introduction. We will then be taking the shuttle to Cobblestone House for tea and desserts.), Type (Social), Start date (06/24/2006), Start time (2:00 PM), Group (Summer Series of Fun), End date (06/24/2006), End time (5:00 PM), Campaign (Playground Campaign), Event goal (\$5,000.00), Itinerary desc (Casual Dress), Capacity (100), No. invited (125), and checkboxes for "Event is inactive" and "Display on 'Calendar of Events'". A status bar at the bottom shows "No. Participants: 100", "No. Registered: 100", and "No. Attended: 0".

8. After you enter or edit the appropriate information, click **Save and Close** on the toolbar.

Toolbars for Event Management

A toolbar is a row of buttons that represent commands or functions for a record. You can use these buttons as alternatives to menu commands to save time during data entry. With *Event Management*, you should be familiar with two toolbars: the event record toolbar and the participant record toolbar.

Toolbar for Event Records

When you add or open an event record, a toolbar always appears between the event record's menu bar and its tabs. It provides quick access to commands and functions you use most often.



Toolbar for Participant Records

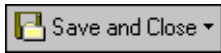
When you add or open a participant record, a toolbar appears between the participant record's menu bar and its tabs. It provides quick access to commands and functions you use most often.



Event and Participant Record Toolbar Buttons

Note: You can set up a user option that enables you to view tooltips that explain the function of each toolbar command. Tooltips appear when you hold your cursor (hover) over each item in the toolbar. For information about how to set up this user option, see the User Options chapter of the *Program Basics Guide*.

This is a list of toolbar buttons appearing on your event and participant records. Not all buttons appear on each record.



Save and close the record (**Save and New** can be accessed from the down arrow beside **Save and Close**. Use **Save and New** to save the record, close the saved record and open a new record.)



Save the record and keep the record open



Print labels, envelopes, name tags, place cards, or an event profile



Preview labels, envelopes, name tags, place cards, or an event profile



Go to the first record



Go to the previous record



Go to the next record



Go to the last record



Go to records associated with this record



Open the Calendar of Events (event record only)



Open a Financial Summary or a Goal Summary (event record only)



Add this record to your favorite list



Open the Event, Participant Properties screen



Validate, correct, and certify the participant address. This toolbar button appears only if you have *AddressAccelerator*, our address correction data service.



Access help from online help files, user guides, online support, or the Blackbaud Web site



Create and edit macros to create shortcuts for functions you perform repeatedly in *The Raiser's Edge*. This toolbar button is available only if you use the optional module *VBA for Advanced Customization*.

For more information about menu bars, see the *Program Basics Guide*.

User Options

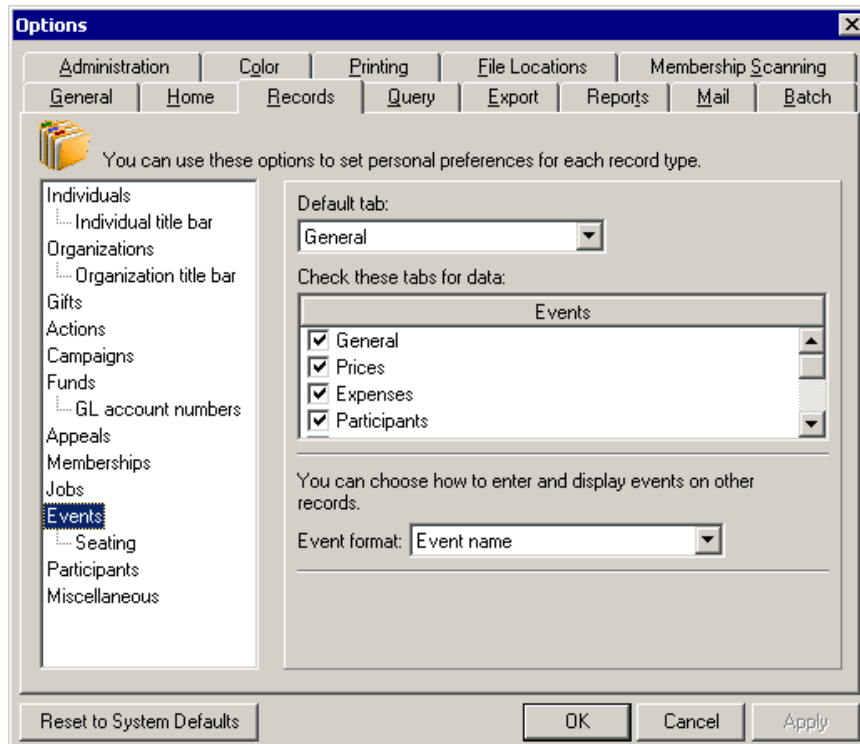
User options are preferences you set that affect how *The Raiser's Edge* looks and runs on any workstation you use. User options are login-specific, which means these options affect only workstations you enter with your password. To establish user options, select **Tools, User Options** from the menu bar on the shell of *The Raiser's Edge*. The Options screen appears so you can establish certain user options for the optional module *Event Management*.

From the Records tab of the Options screen, you can select which tab appears automatically when you add or open an event or participant record; the tabs the program checks for data; and how the event name or your participant names appear on other records. You can also determine settings for your event seating.

From the Color tab of the Options screen, you can select the colors in which event date cells and action date text appear on your event calendar. You can also set up your participant legend from the Color tab. The Printing tab impacts parameter files used when you print labels, envelopes, place cards, name tags, and profiles. In this section, we discuss how to set up event user options on the Records tab and how to set up colors for your event calendar on the Color tab. For information about how to set up user options on the Printing tab, other options on the Color tab, and user options in general, see the User Options chapter of the *Program Basics Guide*.

► **Establish event user options**

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools, User Options**. The Options screen appears.



Note: To establish user options, you can also select **Tools, User Options** from the menu bar of an event record.

2. Select the Records tab.
3. From the tree view on the left, select **Events**. The Event user option selections appear on the right.
4. In the **Default tab** field, select the tab to display automatically when you add or open an event record.

Tip: To save time, in the **Events** box, you can right-click and **Deselect All** or **Select All** the checkboxes.

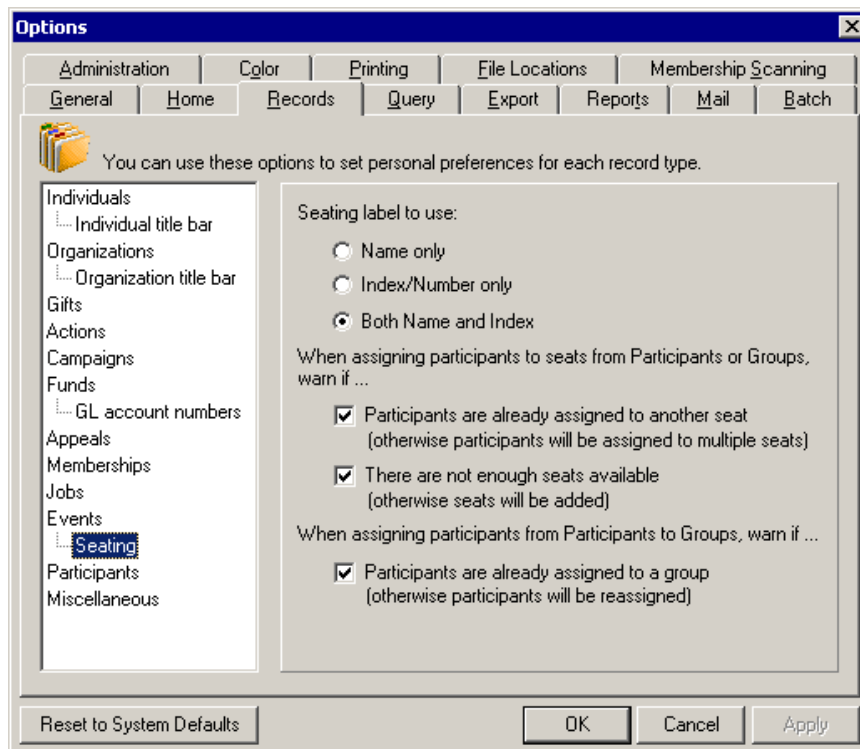
5. In the **Events** box, mark the checkbox by the tabs you want the program to search for data. On your event records, a red check mark appears on each selected tab when you add data.
6. In the **Event format** field, select how events appear throughout the program — by Event name or Event ID.
7. To apply and save your changes, click **Apply**. To save your changes and close the Options screen, click **OK**.

► **Establish event seating user options**

Event seating user options control how the functionality on the Seating screen works in certain instances. To access the Seating screen after you run the Seating Setup Wizard, click **Seating** on the General tab of the event record or on the General 2 tab of the participant record. For information about the Seating Setup Wizard and the Seating screen, see “Event Seating” on page 39.

Note: To establish Event Seating user options, you can also select **Tools, User Options** from the menu bar of the Seating screen, event record, or participant record.

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools, User Options**. The Options screen appears.



2. Select the Records tab.

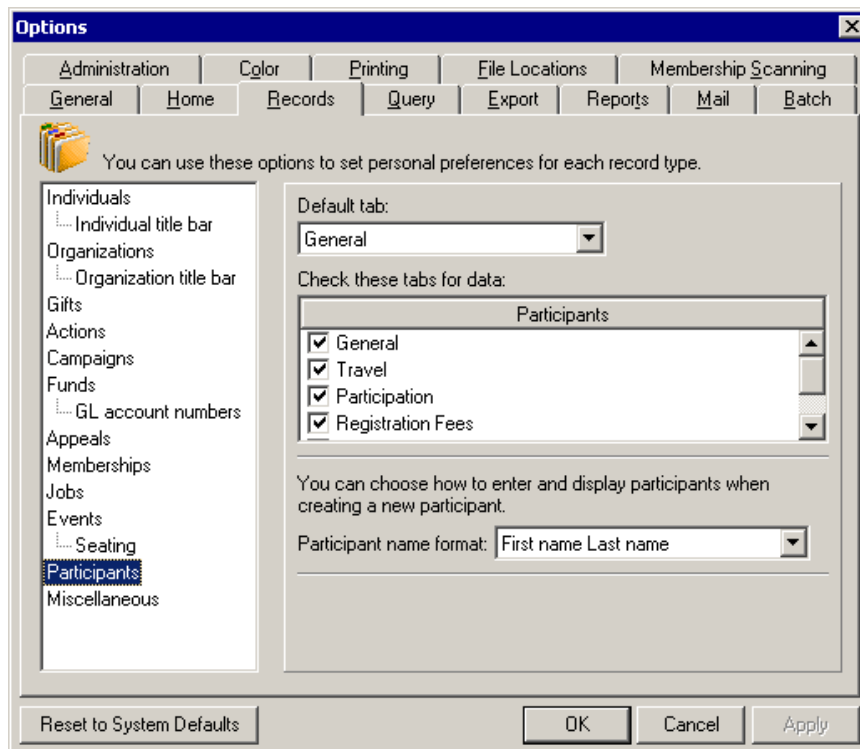
Note: If **Seating** does not appear in the treeview, double-click **Events**. **Seating** appears as a branch in the tree view.

3. From the tree view on the left, under **Events**, select **Seating**. The Event Seating user option selections appear.
4. If, on the Seating screen, you want your seating arrangements in the **Seats** frame to show just the names of the sections, rows, tables, or seats; under **Selected label to use**, select **Name only**. To see only a number, select **Index/Number only**. To see a number and the name, select **Both Name and Index**.
5. Under **When assigning participants to seats from Participants or Groups**, select when to receive warnings when you assign participants from the **Participants** frame to their seats in the **Seats** frame or participant groups from the **Groups** frame to their seats in the **Seats** frame.
 - To receive a warning, when a participant has already been assigned to a seat, mark **Participants are already assigned to another seat (otherwise participants will be assigned to multiple seats)**.
 - To receive a warning when there are not enough seats for your participant(s), mark **There are not enough seats available (otherwise seats will be added)**.
6. To receive a warning when you assign participants from the **Participants** frame to a group in the **Groups** frame and a participant has already been assigned to a group, under **When assigning participants from Participants to Groups, warn if**, mark **Participants are already assigned to a group (otherwise participants will be reassigned)**.
7. To apply and save your changes, click **Apply**. To save your changes and close the Options screen, click **OK**.

► Establish Participant user options

Note: To establish user options, you can also select **Tools, User Options** from the menu bar of an event record.

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools, User Options**. The Options screen appears.



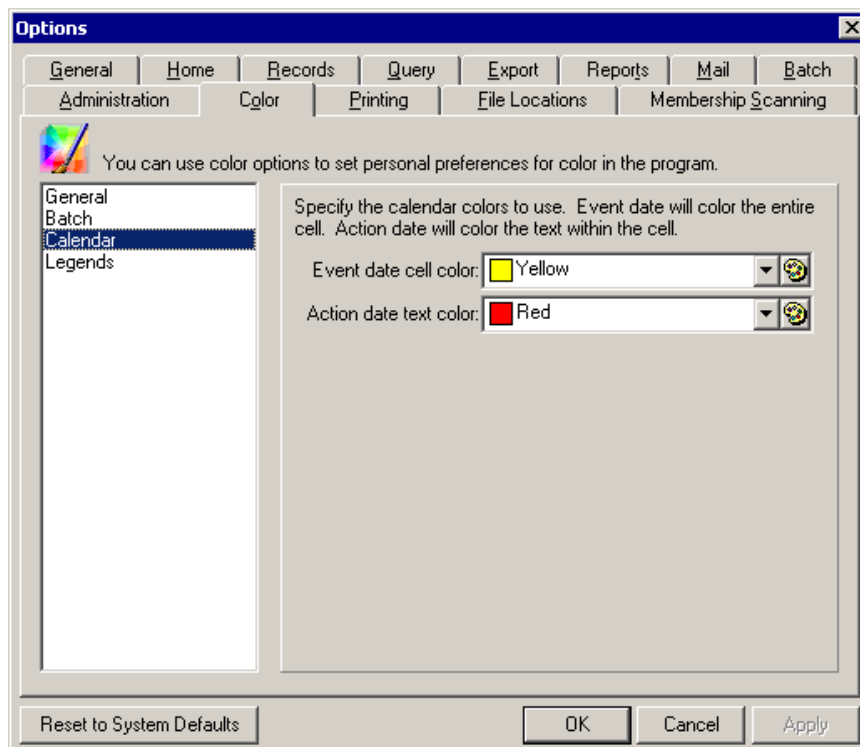
2. Select the **Records** tab.
3. From the tree view on the left, select **Participants**. The Participant user option selections appear.
4. In the **Default tab** field, select the tab to appear automatically when you add or open a participant record.

Tip: To save time, in the **Participants** box, you can right-click and **Deselect All** or **Select All** the checkboxes in the grid.

5. In the **Participants** box, mark the checkbox by the tabs you want the program to search for data. On your participant records, a red check mark appears on each selected tab when you add data.
6. In the **Participant name format** field, select how you want participant names to appear throughout the program — by First name Last name or Last name, First name.
7. To apply and save your changes, click **Apply**. To save your changes and close the Options screen, click **OK**.

► Establish calendar colors

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools, User Options**. The Options screen appears.



2. Select the Color tab.
3. On the Color tab, select **Calendar** in the list on the left. The Calendar of Events selections appear.
4. In the **Event date cell color** field, select the color in which to display date cells when events appear on the Calendar of Events.
5. In the **Action date text color** field, select the color in which to display date text when event actions appear on the Calendar of Events.
6. To apply and save your changes, click **Apply**. To save your changes and close the Options screen, click **OK**.

Event Management Business Rules

Note: You may activate other business rules through event records. For example, if you have a business rule set up for gifts, it applies when you link a gift to a participant.

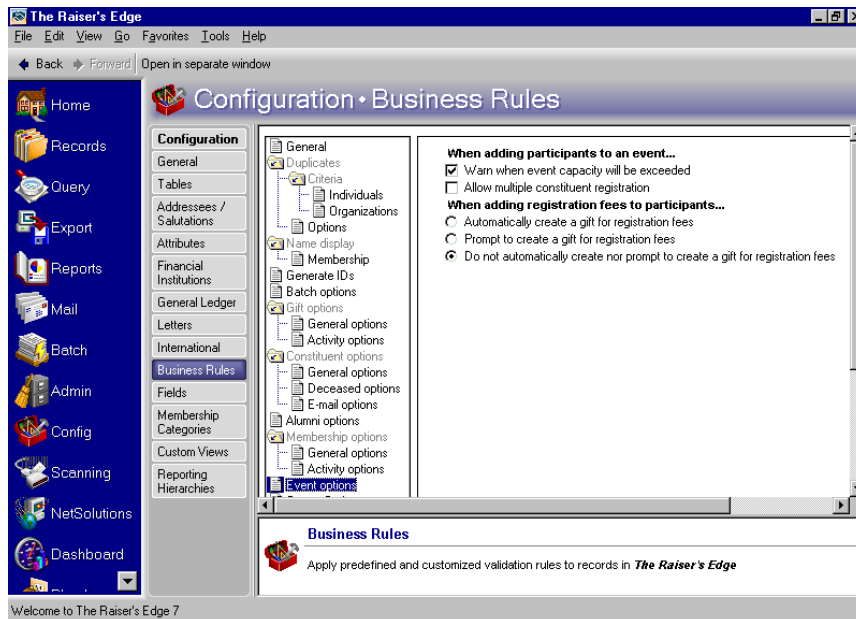
With business rules, you can control certain functions and displays throughout *The Raiser's Edge*. You can establish business rules only if you have rights established from the **Security** link of *Administration*. Business rules affect all users of the program. Two business rules are specific to the optional module *Event Management*. One rule determines whether the program warns you when event capacity is reached when you add participants to an event and whether to allow multiple constituent registrations for an event. The other rule determines whether the program automatically creates a gift for registration fees, prompts you to create a gift for registration fees, or does neither when you add participants to an event.

► Define business rules for events

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

Note: You can establish business rules only if you have rights established from the **Security** link of Administration.

2. Click **Business Rules**. The Business Rules page appears.
3. From the tree view on the left, select **Event Options**. The event business rules appear.



4. To receive a warning you event capacity is reached while you add new participants to an event, under **When adding participants to an event**, mark **Warn when event capacity will be exceeded**.
5. To allow a constituent to register more than once for an event, under **When adding participants to an event**, mark **Allow multiple constituent registration**.
6. To automatically create a gift for the registration fees for the participants of your events, select **Automatically create a gift for registration fees**. To have the program ask whether to create a gift for the registration fees for the participants of your events, select **Prompt to create a gift for registration fees**. To not automatically create gifts or ask whether to create a gift for registration fees for the participants of your events, select **Do not automatically create nor prompt to create a gift for registration fees**.

After you make changes to business rules, your preferences are updated right away.

Set Up an Event

The optional module *Event Management* is divided into two major parts. The first aspect involves setting up an event record and encompasses the General, Prices, Expenses, Jobs (when you use the optional module *Volunteer Management*), Actions, Attributes, Media, and Notes tabs of the event record.

Categories and General Information

When you set up an event, you must first establish the category, or kind of event you are planning. The four categories are **Sporting event**, **Dinner**, **Class** and **Other**. The category determines what fields appear on the event and participant records and is established on the General tab of the event record. After you establish the event category, you can add general information such as a description and type of event; the group name, if the event is part of a series of events; the campaign associated with the event; the event goals; the start and end dates; the coordinators for the event; the location of the event; the instructors, if the event is a class; and the seating for the event.

► Add a sporting event

When you add a sporting event record, you must first establish the category of **Sporting event**. After you establish the category, you can then proceed to add general sporting event information. You do this on the General tab of the event record.

Scenario: Your organization holds its annual golf tournament, with all proceeds to benefit the new library. This event is part of a series of events your organization holds each summer. Add the golf tournament sporting event record to your database.

Note: If you edit a record and notice your changes are not updated automatically, click **Save** on the toolbar before you add any additional information.

1. On the Raiser's Edge bar, click **Records**.
2. Click **Events**. The Events page appears.
3. Click **New Event**. The New Event screen appears.

Tip: When you search your database, you can use an event ID to quickly locate an event record.

4. Select the General tab.
5. In the **Name** field, enter "Annual Golf Tournament".
6. In the **ID** field, enter "GOLF".

The ID must be unique. Enter an ID in the **ID** field, or skip this field to have the program automatically generate an ID. The ID automatically appears in the field if you do this. For information about how to automatically assign Event IDs, see the *Configuration & Security Guide*.

Note: Another example of a **Group** is if your organization is a school. The sporting event could be part of a group of events for Homecoming Week.

7. Select the category of the event. Because this event is a golf tournament, select **Sporting event**. The category determines what fields and buttons appear on the General tab of the event record.
8. In the **Description** box, enter “This is a captain’s choice tournament to be held at Fairfield Country Club. Event will feature live music and dancing afterward, with food provided by Divine Catering.”
9. In the **Type** field, select “Golf Tournament”. Type represents the kind of sporting event.

Tip: In the **Event goal** field, it is not necessary to enter a currency character or decimal. The program automatically formats the currency when you leave the field.

10. In the **Group** field, select the group name, “Summer Series of Fun”. This tournament is part of a group of events your organization holds every summer.
To use the Grouped Event Registration wizard, you must select a group in the **Group** field. For information, see “Multiple Registration for Grouped Events” on page 211.
11. In the **Campaign** field, select “Endowment Campaign”. You want the proceeds from this event to go toward this campaign. When you select a campaign, the event appears on the Events tab of the Endowment Campaign record, and the two records are linked together.
12. In the **Event goal** field, enter the amount \$15,000. To access the calculator and calculate the amount you plan on earning for this event, press **F7** or click the calculator button. The **Event goal** represents the amount, minus expenses, you hope to raise from this event.

Note: You can also use the **Itinerary desc** field to describe an aspect about the tournament, such as “Annual Golf Tournament - Captain’s Choice”. Another example is to designate how the proceeds are used, such as “Annual Golf Tournament - Benefits go toward the new library”.

13. In the **Itinerary desc** field, enter “Annual Golf Tournament - Proper Dress Required”. You can include this field when you export event information, such as to create an itinerary in another program.
14. In the **Capacity** field, enter “120”. This is the maximum number of people who can participate in the tournament. In the **No. invited** field, enter “500”. This is the number of invitations extended.
15. In both the **Start date** and **End date** fields, enter the date 07/22/2006. You enter the date in both fields because the tournament takes place on one day.
16. In the **Start time** field, enter “8:00 AM”.
17. In the **End time** field, enter “11:59 PM”. The event ends at midnight.
18. Leave **Display on ‘Calendar of Events’** marked. You want the golf tournament to appear on your Calendar of Events. For information, see “Calendar of Events” on page 196.

Note: The procedures to track coordinators, add a location, and set up seating are discussed in separate sections in this guide.

19. After you enter information on the General tab of the New Event screen, click **Save and Close** on the toolbar to save and close the event record.

► Add a dinner event

A dinner event can be any type of event where you provide a meal. Dinner events are not restricted to “dinner.” You may have luncheons, picnics, and breakfasts at your organization. When you add a dinner event record, you must first establish the category of **Dinner**. After you establish the category, you can then add general dinner information on the General tab of the event record.

Scenario: You plan your organization’s annual Volunteer Luncheon. At the luncheon, you honor your dedicated, hardworking volunteers. Add the dinner event record to your database.

Note: If you edit a record and notice your changes are not updated automatically, click **Save** on the toolbar before you add any additional information.

1. On the Raiser’s Edge bar, click **Records**.
2. Click **Events**. The Events page appears.
3. Click **New Event**. The New Event screen appears.

The screenshot shows the 'New Event' window with the following details:

- Name:** Volunteer Luncheon
- ID:** VOLLUNCH
- Category:** ☒ Dinner
- Description:** The annual volunteer luncheon, honoring our hardworking volunteers, will be held at the Beachside Hotel. Lunch will be provided by Beachside Catering. An awards ceremony will take place after lunch, with Henry DuBois presenting the awards.
- Type:** Volunteer Luncheon
- Start date:** 12/04/2006
- Start time:** 11:00 AM
- Group:** Volunteer Appreciation
- End date:** 12/04/2006
- End time:** 2:00 PM
- Capacity:** 100
- No. invited:** 50
- Display on 'Calendar of Events':** ☒

4. Select the General tab.

Tip: When you search your database, you can use an event ID to quickly locate an event record.

5. In the **Name** field, enter “Volunteer Luncheon”.
6. In the **ID** field, enter “VOLLUNCH”.
The ID must be unique. Enter the ID in the field, or skip this field to have the program automatically generate an ID. The ID automatically appears in the field if you do this. For information about how to automatically assign Event IDs, see the *Configuration & Security Guide*.
7. Select the category of the event. Because this event is an annual luncheon, select **Dinner**. The category determines what fields and buttons appear on the General tab of the event record.
8. In the **Description** box, enter “The annual volunteer luncheon, honoring our hardworking volunteers, will be held at the Beachside Hotel. Lunch will be provided by Beachside Catering. An awards ceremony will take place after lunch, with Henry DuBois presenting the awards.”

Note: The **Event goal** field and **Campaign** field were omitted from this scenario because the organization does not have a monetary goal for this luncheon. This is an appreciation luncheon, not a fundraising event. This event has no monetary goals or purposes for these monetary goals.

9. In the **Type** field, select “Volunteer Luncheon”. Type represents the kind of dinner event.
10. In the **Group** field, select the group name, “Volunteer Appreciation”. This dinner is part of a series of events you hold throughout the year to honor your volunteers.
To use the Grouped Event Registration wizard, you must select a group in the **Group** field. For information, see “Multiple Registration for Grouped Events” on page 211.
11. In the **Itinerary desc** field, enter “Volunteer Luncheon - Casual Dress”. You can include this field when you export event information, such as to create an itinerary in another program.
12. In the **Capacity** field, enter “100”. This is the maximum number of people who can attend the dinner. In the **No. invited** field, enter “50”. This is the number of invitations sent. The number in the **Capacity** field is twice as large as the number in the **No. invited** field because on each invitation you noted that each volunteer could bring one guest.
13. In the **Start date** and **End date** fields, enter the date 12/04/2006. You enter the date in both fields because the dinner takes place on one day.
14. In the **Start time** field, enter “11:00 AM”. In the **End time** field, enter “2:00 PM”.

Note: The procedures to track coordinators, add a location, and set up seating are discussed in separate sections in this guide.

15. Leave **Display on ‘Calendar of Events’** marked to have the Volunteer Luncheon appear on your Calendar of Events. For information, see “Calendar of Events” on page 196.
16. After you enter information on the General tab of the New Event screen, click **Save and Close** on the toolbar to save and close the event record.

► Add a class event

When you add a class event record, you must first establish the category of **Class**. After you establish the category, you can then add general class information on the General tab of the event record.

Scenario: Your organization holds its Summer CPR class. This summer class is one of a group of public safety classes you offer throughout the year. Add the class event record to your database.

Note: If you edit a record and notice your changes are not updated automatically, click **Save** on the toolbar before you add any additional information.

1. On the Raiser’s Edge bar, click **Records**.
2. Click the **Events** button. The Events page appears.

3. Click **New Event**. The New Event screen appears.

4. Select the General tab.

Tip: When you search your database, you can use an event ID to quickly locate an event record.

5. In the **Name** field, enter “CPR Training - Summer”.
6. In the **ID** field, enter “CPRSUM”.

The ID must be unique. Enter the ID in the field, or skip this field to have the program automatically generate an ID. The ID automatically appears in the field if you do this. For information about how to automatically assign event IDs, see the *Configuration & Security Guide*.

7. Select the category of the event. Because this event is a CPR class, select **Class**. The category determines the fields and buttons that appear on the General tab of the event record.
8. In the **Description** box, enter “Summer CPR class”.
9. In the **Type** field, select “CPR class”. Type represents the kind of class.
10. In the **Group** field, select the group name, “Public safety classes”. This CPR class is one of a series of public safety classes given by your organization.
To use the Grouped Event Registration wizard, you must select a group in the **Group** field. For information, see “Multiple Registration for Grouped Events” on page 211.
11. In the **Campaign** field, select “Annual Campaign”. You want the proceeds from this event to go toward this campaign. When you select a campaign, the event appears on the Events tab of the Annual Campaign record, and the two records are linked together.

Tip: In the **Event goal** field, it is not necessary to enter a currency character or decimal. The program automatically formats the currency when you leave the field.

12. In the **Event goal** field, enter the amount \$1,250. To access the calculator and calculate the amount you plan on earning for this event, press **F7** or click the calculator button. The event goal represents the amount, minus expenses, you hope to raise from this event.
13. In the **Itinerary desc** field, enter “Adult CPR Class - Summer Session”. You can include this field when you export event information, such as to create an itinerary in another program.

Note: The procedures to set up a class schedule, add instructors and coordinators, add a location, and set up seating are discussed in separate sections in this guide.

14. In the **Capacity** field, enter “50”. This is the maximum number of people who can attend the CPR class. In the **No. invited** field, enter “100”. This is the number of invitations extended.
15. Leave **Display on ‘Calendar of Events’** marked. You want the CPR class to appear on your Calendar of Events. For more information, see “Calendar of Events” on page 196.
16. After you enter information on the General tab of the New Event screen, click **Save and Close** on the toolbar to save and close the event record.

► **Add an event with the category of Other**

There are times when you want to add other types of events besides sporting events, dinners, and classes. When you add other event records, you must first establish the category of **Other**. After you establish the category, you can then add general event information on the General tab of the event record.

Scenario: It is the holiday season. Your organization is holding its annual Holiday Ball, with all proceeds benefiting the Annual Fund. Add this other event record to your database.

1. On the Raiser’s Edge bar, click **Records**.
2. Click **Events**. The Events page appears.

Note: If you edit a record and notice your changes are not updated automatically, click **Save** on the toolbar before you add any additional information.

3. Click **New Event**. The New Event screen appears.

4. Select the General tab.

Tip: When you search your database, you can use an event ID to quickly locate an event record.

5. In the **Name** field, enter “Annual Holiday Ball”.

6. In the **ID** field, enter “HOLIDAY”.

The ID must be unique. Enter the ID in the field, or skip this field to have the program automatically generate an ID. The ID automatically appears in the field if you do this. For information about how to automatically assign event IDs, see the *Configuration & Security Guide*.

7. Select the category of the event. Because this event is an annual holiday ball and no option matches this type of event, select **Other**. The category determines the fields and buttons that appear on the General tab of the event record.
8. In the **Description** box, enter “Annual Holiday Ball with proceeds going to the Annual Fund”.
9. In the **Type** field, select “Social”. Type represents the kind of other event.
10. In the **Group** field, select the group name “Yearly gala balls”. This event is one of four gala balls you give throughout the year. Therefore, it is part of a series, or group.
To use the Grouped Event Registration wizard, you must select a group in the **Group** field. For information, see “Multiple Registration for Grouped Events” on page 211.
11. In the **Campaign** field, select “Annual Campaign”. You want the proceeds from this event to go toward this campaign. When you select a campaign, the event appears on the Events tab of the Annual Campaign record, and the two records are linked together.

Tip: In the **Event goal** field, it is not necessary to enter a currency character or decimal. The program automatically formats the currency when you leave the field.

12. In the **Event goal** field, enter the amount \$125,000. To access the calculator and calculate the amount you plan on earning for this event, press **F7** or click the calculator button. The event goal represents the amount, minus expenses, you hope to raise from this event.
13. In the **Itinerary desc** field, enter “Holiday Ball - Black Tie Required”. You can include this field when you export event information, such as to create an itinerary in another program.
14. In the **Capacity** field, enter “1000”. This is the maximum number of people who can attend the ball. In the **No. invited** field, enter “2000”. This is the number of invitations extended.
15. In both the **Start date** and **End date** fields, enter the date 12/11/2006. You enter the date in both fields because the ball takes place on one day.
16. In the **Start time** field, enter “7:00 PM”.
17. In the **End time** field, enter “11:59 PM”. The ball ends at midnight.

Note: Tracking coordinators, adding a location, and setting up seating are all discussed in separate sections later on in this guide.

18. To have the Annual Holiday Ball appear on your Calendar of Events, leave **Display on ‘Calendar of Events’** marked. For information, see “Calendar of Events” on page 196.
19. After you enter information on the General tab of the New Event screen, click **Save and Close** on the toolbar to save and close the event record.

Inactive Event Records

To make an event record inactive, mark **Event is inactive** on the General tab of the event record. Once you make an event record inactive, it is excluded from your searches. If necessary, you can make an inactive event record active again.

► Make an event record inactive

To make an event record inactive, mark **Event is inactive** on the General tab of an event record.

Scenario: The holiday season is over. Your organization already held its Annual Holiday Ball for 2006. You are in the process of planning the Annual Holiday Ball for 2007. You decide to make the Annual Holiday Ball for 2006 event record inactive. Open the Annual Holiday Ball event record and mark **Event is inactive**. If you have not added an Annual Holiday Ball, see “Add an event with the category of Other” on page 25.

1. From the Annual Holiday Ball event record, select the General tab. For information about how to open an event record, see “Open an event record” on page 10.

2. Mark **Event is inactive**.
3. To save the changes, click **Save and Close** on the toolbar. The Annual Holiday Ball event record is now inactive.

► Make an inactive event record active

If necessary, you can always make an inactive event record active again.

Scenario: Your organization is holding its annual Holiday Ball. On the Annual Holiday Ball event record, someone inadvertently marked the **Event is inactive** checkbox. The event record should be active, so you need to correct this mistake. Open the Annual Holiday Ball event record and make the event record active again. If you have not added the Annual Holiday Ball, see “Add an event with the category of Other” on page 25. If you have not made the event record inactive, see “Make an event record inactive” on page 27.

1. On the Raiser’s Edge bar, click **Records**.
2. Click **Events**. The Events page appears.

3. Click **Open an Event**. The Open screen for events appears.

Find: Event Search using query: <Default>

Open Cancel

Add New Options

Find Now New Search

Expand Results

Find Events that meet these criteria:

Event Name: Event Group:

Event ID: Event Type:

Event Category: Event Location:

☐ Display Inactive Events ☐ Exact match only

Note: After you mark the **Display Inactive Events** checkbox, the Open screen for Events automatically displays inactive event records from this point on. If you decide you do not want to display inactive event records, you can unmark this checkbox.

4. On the Open screen for events, mark **Display Inactive Events**.

Find: Event Search using query: <Default>

Open Cancel

Add New Options

Find Now New Search

Expand Results

Find Events that meet these criteria:

Event Name: Event Group:

Event ID: Event Type:

Event Category: Event Location:

☒ Display Inactive Events ☐ Exact match only

5. Click **Find Now**. All your event records appear in the grid, including ones marked inactive.

The 'Open' dialog box displays a list of event records. The selected record is 'Annual Holiday Ball - ...' with Eventid 'HOLIDAY', Event Category 'Other', and Event Group 'Yearly gala balls'. The 'Find Now' button is located on the right side of the dialog.

Name	Eventid	Event Category	Event Group
Afternoon Tea	Afternoon Tea	Dinner	Summer Series of Fun
Alta Tennis Tournament	TENNIS	Sporting Event	
Annual Holiday Ball - ...	HOLIDAY	Other	Yearly gala balls
CPR Training Session	CPRTRAIN	Class	Public safety classes
Fire Prevention	Fire Prevent	Class	Public safety classes
Golf Tournament - 1999	GOLF99	Sporting Event	1999 Golf Events
Golf Tournament - 2002	GOLF2002	Sporting Event	Summer Series of Fun
Pasta Dinner (Pre-Walk)	PASTA	Dinner	Walk-A-Thon for Relief
Playground Grand Op...	OPENING	Dinner	
Spring Ball	BALL	Other	Gala

Find Events that meet these criteria:

Event Name: Event Group:

Event ID: Event Type:

Event Category: Event Location:

☒ Display Inactive Events ☐ Exact match only

13 records found.

6. Select the event record to make active again and click **Open**. The event record appears.

The 'Annual Holiday Ball' event record form is displayed. The 'General' tab is selected. The 'Event is inactive' checkbox is checked.

Name: Annual Holiday Ball ID: HOLIDAY

Category: ☐ Sporting event ☐ Dinner ☐ Class ☒ Other

Description: Annual Holiday Ball with proceeds going to the Annual Fund.

Type: Social Start date: 12/11/2006 Start time: 7:00 PM

Group: Yearly gala balls End date: 12/11/2006 End time: 11:59 PM

Campaign: Annual Campaign Coordinators: Julie M. Bach

Event goal: \$125,000.00 Location: Berkshire Auditorium

Itinerary desc: Holiday Ball - Black Tie Required Seating: Seating has not been set up for this event

Capacity: 1000 No. invited: 2000

☒ Event is inactive ☒ Display on 'Calendar of Events'

No. Participants: 1000 No. Registered: 1000 No. Attended: 0

7. Select the General tab.
8. Unmark **Event is inactive**.
9. To save the changes, click **Save and Close** on the toolbar. The event record is now active again.

Class Schedules

When you set up a class event, you may need to establish a class schedule. You should decide the frequency of the class, how many classes to hold, the day(s) of the week, the start date, the start time, and the end time. You can establish all this information from the **Schedule** button on the General tab of your class event record. For example, you hold a Volunteer Orientation class. You decide to hold this class every Saturday in September, starting on 09/04/2006. The class starts at 9:00 a.m. and last until noon. You can establish this type of schedule from the **Schedule** button on the General tab of the Volunteer Orientation event record.

A class does not have to have a schedule. You may hold a class once on a single day. If this is the case, you can still use the **Schedule** button to determine the date and time of the single class.

► Set up a class schedule

To set up a schedule for a class, click **Schedule** on the General tab of a class event record.

Scenario: Your organization holds its Summer CPR class on two Saturdays in July, from 8:00 a.m. until noon. The class starts on June 2, 2007. You need to set up a schedule for this class. If you have not added a Summer CPR class event, see “Add a class event” on page 23.

1. From the CPR Training - Summer event record, select the General tab. For information about how to open an event record, see “Open an event record” on page 10.

The screenshot shows a software window titled "CPR Training - Summer". The menu bar includes File, Edit, View, Event, Favorites, Tools, and Help. The toolbar contains icons for Save and Close, Print, Find, Navigation, and Help. Below the toolbar are tabs for Actions, Attributes, Media, and Notes. Under the Actions tab, there are sub-tabs: General (selected), Prices, Expenses, Jobs, and Participants. The General tab contains the following fields and controls:

- Name:** CPR Training - Summer
- ID:** CPRSUM
- Category:** Radio buttons for Sporting event, Dinner, Class (selected), and Other.
- Description:** Summer CPR class
- Type:** CPR class (dropdown menu)
- Group:** Public safety classes (dropdown menu)
- Campaign:** Annual Campaign (dropdown menu)
- Event goal:** \$1,250.00
- Itinerary desc:** Adult CPR Class - Summer Sessio
- Capacity:** 50
- No. invited:** 100
- Buttons:** Schedule, Instructors, Coordinators, Location, and Seating.
- Status:** Event is inactive (checkbox), Display on 'Calendar of Events' (checkbox, checked).
- Summary:** A schedule has not been set up for this event; Seating has not been set up for this event.
- Footer:** No. Participants: 0, No. Registered: 0, No. Attended: 0.

2. Click **Schedule**. The Class Schedule screen appears.

Class Schedule for CPR Training - Summer

Use the 'Schedule' fields, then select 'Update' to generate the schedule.

Frequency: Weekly No. classes:

Every 1 week(s) on Sun Mon Tue Wed Thu Fri Sat

Start date: Start time: End time:

Update

A schedule has not been setup for this event

OK Cancel

3. In the **Frequency** field, select “Weekly”.

If you hold the class at a different frequency schedule, you can select from these values in the **Frequency** field: Annually (once a year), Semi-Annually (twice a year), Quarterly (four times a year), Monthly (once a month), Semi-Monthly (twice a month), Biweekly (every two weeks), Single Class (one class), or Irregular (not on a regular basis). When you select a frequency, fields appear accordingly so you can enter the number of classes and the days and dates of the classes.

4. Since this class takes place twice every other Saturday, enter “2” in the **No. classes** field and **Every [] week(s) on** field, and mark **Sat** (Saturday). Unmark any other checkboxes presently marked.
5. In the **Start date** field, enter the date the class starts, “06/02/2007”.
6. In the **Start time** field, enter “8:00 AM”. In the **End time** field, enter “12:00 PM”.
7. Click **Update**. Your schedule appears in the grid.

Class Schedule for CPR Training - Summer

Use the 'Schedule' fields, then select 'Update' to generate the schedule.

Frequency: Weekly No. classes: 2

Every 2 week(s) on Sun Mon Tue Wed Thu Fri Sat

Start date: 06/02/2007 Start time: 8:00 AM End time: 12:00 PM

Update

Classes scheduled every 2 weeks on Saturday

OK Cancel

Date	Start Time	End Time
06/02/2007	8:00 AM	12:00 PM
06/16/2007	8:00 AM	12:00 PM

If you select Irregular in the **Frequency** field, the **Start Date** appears, but you must manually enter the schedule into the Schedule grid.

8. Click **OK**. You return to the General tab of the CPR Training - Summer event record. A label that describes the schedule appears beside the **Schedule** button.
9. On the toolbar, click **Save and Close**.

Class Instructors

Instructors are the persons who teach your class events. For example, your organization holds its summer CPR class. Ruth Taylor, a medical professional from your community, teaches the class. Ruth is the teacher, or instructor.

You can track your instructors on the General tab of a class event record. You can click **Instructors** on the General tab of the event record to track them. You must add an instructor as a participant (registrant, guest, or sponsor) of a class event. If you have not already added the instructor as a participant from the Participants tab of the event record, you can click **Instructors** to do so. If you already added the instructor as a participant and marked **Participant is an instructor** on the bottom of the participant record, the participant automatically appears in the **Instructors** field on the General tab of a class event record.

For more information about how to add registrants, guests, and sponsors see “Add Participants” on page 123.

► Track class instructors

To track class instructors, you can click **Instructors** on the General tab of a class event record. Before you track a class instructor, you must add the instructor as a participant on the Participants tab of the same event record and mark **Participant is an instructor**, or you can add an instructor as a participant directly from the **Instructors** button. This procedure shows you how to search for a participant already entered as a participant on the Participants tab.

Scenario: Your organization holds its Summer CPR class. Jason Campbell teaches the event this year. Add Jason as a class instructor on the General tab of the CPR Training - Summer event record. If you have not added a CPR Training - Summer event record, see “Add a class event” on page 23. If you have not added Jason as a participant, see “Add Participants” on page 123.

1. From the CPR Training - Summer event record, select the General tab. For information about how to open an event record, see “Open an event record” on page 10.

The screenshot shows a software window titled "CPR Training - Summer". The menu bar includes File, Edit, View, Event, Favorites, Tools, and Help. The toolbar contains icons for Save and Close, Print, Find, and navigation controls. Below the toolbar are tabs for Actions, Attributes, Media, and Notes. Under the Actions tab, there are sub-tabs: General (selected), Prices, Expenses, Jobs, and Participants. The General tab contains the following fields and controls:

- Name:** CPR Training - Summer
- ID:** CPRSUM
- Category:** Radio buttons for Sporting event, Dinner, Class (selected), and Other.
- Description:** Summer CPR class
- Type:** CPR class (dropdown menu)
- Group:** Public safety classes (dropdown menu)
- Campaign:** Annual Campaign (dropdown menu)
- Event goal:** \$1,250.00
- Itinerary desc:** Adult CPR Class - Summer Sessio
- Capacity:** 50
- No. invited:** 100
- Buttons:** Schedule, Instructors, Coordinators, Location, Seating.
- Footer:** No. Participants: 0, No. Registered: 0, No. Attended: 0.

Note: To add your instructors directly from the **Instructors** field on the event record, enter them in the field, separated by semicolons. When you leave the field, the Open screen for Participants appears so you can search for these participants to add as instructors.

2. Click **Instructors**. The Instructors screen appears.

Instructors for CPR Training - Summer

Use the grid below to enter the instructors for this event.

Name	Comments

Save and Close Cancel

Warning: Before you track an instructor, you must add the instructor to the event record as a participant. If you have not added the instructor as a participant on the Participants tab of the class event record, you can click **Add New** on the Open screen for participants to add the instructor as a participant. For more information about how to add participants, see “Add Participants” on page 123.

3. In the **Name** column, click the binoculars. The Open screen appears, so you can search the participants of the CPR class for Jason Campbell to add as an instructor.

Open

Find: Participant Search using query: <Default>

Find Participants that meet these criteria:

Last/Orig name: Campbell Participation: Participation: Solicitor: Solicitor: Sponsored by: Sponsored by: Guest of: Guest of: Registration: Registration:

First name: Jason

Event: CPR Training - Summer

Event category: Event category: Status: Status:

☐ Display participants who have attended ☐ Exact match only

☐ Check aliases ☐ Check spouse name

Open Cancel Add New Options Find Now New Search Expand Results

4. Enter your criteria on the Open screen and click **Find Now**.
5. In the grid, select Jason's name from the list and click **Open**. A message appears to ask whether to add a job assignment for Jason. Click **No**. You can add the job assignment later. You return to the Instructors screen. Jason's name automatically appears.

Instructors for CPR Training - Summer

Use the grid below to enter the instructors for this event.

Name	Comments
Jason D. Campbell	Senior Instructor

Save and Close Cancel

6. In the **Comments** column, enter any information you have about the instructor.

Note: If you have multiple instructors and all cannot be seen in the **Instructors** field, hold your cursor (hover) over the field. A tooltip displays the entire list of instructors.

7. Click **Save and Close**. You return to the General tab of the CPR Training - Summer event record. In the **Instructors** field, Jason's name appears.

The screenshot shows a software window titled "CPR Training - Summer". It has a menu bar (File, Edit, View, Event, Favorites, Tools, Help) and a toolbar with icons for saving, printing, and navigating. Below the toolbar are tabs for "General", "Prices", "Expenses", "Jobs", and "Participants". The "General" tab is active. It contains several input fields: "Name" (CPR Training - Summer), "ID" (CPRSUM), "Category" (radio buttons for Sporting event, Dinner, Class, Other; Class is selected), "Description" (Summer CPR class), "Type" (CPR class), "Group" (Public safety classes), "Campaign" (Annual Campaign), "Event goal" (\$1,250.00), "Itinerary desc" (Adult CPR Class - Summer Sessio), "Capacity" (50), and "No. invited" (100). There are also checkboxes for "Event is inactive" and "Display on 'Calendar of Events'". On the right side, there are buttons for "Schedule", "Instructors" (showing Jason D. Campbell), "Coordinators", "Location", and "Seating" (with a note: "Seating has not been set up for this event"). At the bottom, a status bar shows "No. Participants: 1", "No. Registered: 0", and "No. Attended: 0".

8. On the toolbar, click **Save and Close**.

Event Coordinators

Coordinators are the persons who oversee an event and make sure the event runs smoothly in the planning stages and at the event itself. To track event coordinators, you can click **Coordinators** on the General tab of an event record. You must add a coordinator as a participant (registrant, guest, or sponsor) of an event. If you have not already added the coordinator as a participant from the Participants tab of the event record, you can click **Coordinators** to do so. If you already added the coordinator as a participant and marked **Participant is a coordinator** on the participant record, the participant automatically appears in the **Coordinators** field on the General tab of a class event record.

For more information about how to add registrants, guests, and sponsors see "Add Participants" on page 123.

► Track event coordinators

To track event coordinators, you can click **Coordinators** on the General tab of an event record. Before you can track a coordinator, you must add the coordinator as a participant on the Participants tab of the same event record and mark **Participant is a coordinator**, or you can add a coordinator as a participant directly from the **Coordinators** button. This procedure shows you how to search for a participant you already entered as a participant on the Participants tab.

Scenario: Your organization holds its Summer CPR class. Mark Adamson coordinates the event this year. Add Mark as an event coordinator on the General tab of the CPR Training - Summer event record. If you have not added a CPR Training - Summer event record, see “Add a class event” on page 23. If you have not added Mark as a participant, see “Add Participants” on page 123.

1. From the CPR Training - Summer event record, select the General tab. For information about how to open an event record, see “Open an event record” on page 10.

The screenshot shows the 'CPR Training - Summer' event record form with the 'General' tab selected. The form includes fields for Name, ID, Category, Description, Type, Group, Campaign, Event goal, Itinerary desc, Capacity, and No. invited. The 'Coordinators' field is empty. The 'Seating' button is disabled with the message 'Seating has not been set up for this event'.

Note: To add coordinators directly from the **Coordinators** field, enter their names in the field, separated by semicolons. When you leave this field, the Search participants screen appears so you can search for these participants to add as coordinators.

2. Click **Coordinators**. The Event Coordinators screen appears.

The screenshot shows the 'Event Coordinators for CPR Training - Summer' screen. It contains a grid with columns for Name and Comments. The grid is empty. At the bottom, there are 'Save and Close' and 'Cancel' buttons.

Warning: Before you track a coordinator, you must add the coordinator to the event record as a participant. If you have not added the coordinator as a participant on the Participants tab of the class event record, click **Add New** on the Open screen to add the coordinator as a participant. For more information about how to add participants, see “Add Participants” on page 123.

3. Click the binoculars. The Open screen appears so you can search the participants of the CPR class for Mark Adamson to add as a coordinator.

Find Participants that meet these criteria:

Last/Org name: Adamson Participation: Solicitor: Sponsored by: Guest of: Registration:

First name: Mark

Event: CPR Training - Summer Event category: Status:

☐ Display participants who have attended ☐ Exact match only

☐ Check aliases ☐ Check spouse name

4. Enter your criteria on the Open screen and click **Find Now**. Select Mark’s name from the list that appears in the grid and click **Open**. A message appears to ask whether to add a job assignment for Mark. Click **No**. You can add the job assignment later. You return to the Event Coordinators screen. Mark’s name automatically appears.

Name	Comments
Mark D. Adamson	Senior Coordinator

Save and Close Cancel

5. In the **Comments** column, enter any information about the coordinator.

Note: If you have multiple coordinators and all cannot be seen in the **Coordinators** field, hold your cursor (hover) over the field. A tooltip displays the entire list of coordinators.

6. Click **Save and Close**. You return to the General tab of the CPR Training - Summer event record. In the **Coordinators** field, Mark's name appears.

CPR Training - Summer

File Edit View Event Favorites Tools Help

Save and Close

Actions Attributes Media Notes

General Prices Expenses Jobs Participants

Name: CPR Training - Summer ID: CPRSUM

Category: ☐ Sporting event ☐ Dinner ☒ Class ☐ Other

Description: Summer CPR class

Type: CPR class Schedule Classes scheduled every 2 weeks on Satur...

Group: Public safety classes Instructors Jason D. Campbell

Campaign: Annual Campaign Coordinators Mark D. Adamson

Event goal: \$1,250.00 Location

Itinerary desc: Adult CPR Class - Summer Sessio Seating Seating has not been set up for this event

Capacity: 50 No. invited: 100

☐ Event is inactive ☒ Display on 'Calendar of Events'

No. Participants: 2 No. Registered: 0 No. Attended: 0

7. On the toolbar, click **Save and Close**.

Event Location

Before you can host an event, you must decide on where to hold the event. Once you establish a location, you can track it on the General tab of the event record. From the **Location** button on the General tab, you can track the location name, address, phone number, location contact, and any notes about the location.

► **Track event location**

You can track an event location on the General tab of an event record.

Scenario: Your organization holds its annual golf tournament. You decide to hold the tournament at Fairfield Country Club. Enter the location on the General tab of the golf tournament event record. If you have not added the annual golf tournament event record, see “Add a sporting event” on page 20.

1. From the Annual Golf Tournament event record, select the General tab. For information about how to open an event record, see “Open an event record” on page 10.

The screenshot shows the 'Annual Golf Tournament' event record form with the 'General' tab selected. The form includes fields for Name, ID, Category, Description, Type, Group, Campaign, Event goal, Itinerary desc, Capacity, No. invited, and checkboxes for 'Event is inactive' and 'Display on Calendar of Events'. The 'Location' field is currently empty. The bottom status bar shows 'No. Participants: 120', 'No. Registered: 120', and 'No. Attended: 0'.

Note: You can also enter a location in the **Location** field on the General tab of the event record.

2. Click **Location**. The Location Information screen appears.

The screenshot shows the 'Location Information for Annual Golf Tournament' dialog box. It contains fields for Location, Country, Address Lines, City, State, ZIP, Phone, and Contact. The 'Notes' field contains the text: 'The tournament will take place on the Sea Gull Course.' The 'OK' and 'Cancel' buttons are at the bottom.

3. In the **Location** field, enter where the event takes place, “Fairfield Country Club”.
4. In the **Country** field, select “United States”.
5. In the **Address Lines** field, enter the location’s street address, “1289 Myrtle Grove Way”.

6. In the **City** field enter “Charleston”; in the **State** field, select “SC”; and in the **ZIP** field, enter “29403”.
7. In the **Phone** field, enter the location’s phone number, “843-555-2289”.
8. In the **Contact** field, enter the person to get in touch with if you have questions or concerns about the event location, “Lamar Smith, president”.
9. In the **Notes** box, enter “The tournament will take place on the Sea Gull Course.”
10. Click **OK**. You return to the General tab of the Annual Golf Tournament event record. In the **Location** field, Fairfield Country Club appears.

The screenshot shows the 'Annual Golf Tournament' event record in the 'General' tab. The form includes the following fields and values:

- Name:** Annual Golf Tournament
- ID:** GOLF
- Category:** Sporting event (selected)
- Description:** This is a captain's choice tournament to be held at Fairfield Country Club. Event will feature live music and dancing afterward, with food provided by Divine Catering.
- Type:** Golf Tournament
- Start date:** 07/22/2006
- Start time:** 8:00 AM
- Group:** Summer Series of Fun
- End date:** 07/22/2006
- End time:** 11:59 PM
- Campaign:** Endowment Campaign
- Coordinators:** Jason D. Campbell
- Event goal:** \$15,000.00
- Location:** Fairfield Country Club
- Itinerary desc:** Annual Golf Tournament - Proper
- Seating:** Seating has not been set up for this event
- Capacity:** 120
- No. invited:** 500
- ☐ Event is inactive
- ☒ Display on 'Calendar of Events'

At the bottom, the status is shown: No. Participants: 120, No. Registered: 120, No. Attended: 0.

11. On the toolbar, click **Save and Close**.

Event Seating

Note: On the General tab of a participant record, you may decide to add the participant to a group before you set up your seating arrangements. When you do this, the Seating Setup Wizard does not appear the first time you click **Seating**. The Seating screen appears. To set up seating arrangements, click **Setup** in the **Seats** frame of the Seating screen at any time.

You can set up seating for any type of event — sporting event, dinner, class, or other. To initially set up seating, you can click **Seating** on the General tab of the event record. When you click **Seating** the first time, the Seating Setup Wizard appears. With the wizard, you can decide how to arrange your seating. You can set up sections, tables, and seats; sections, rows, and seats; or just sections and seats. With the wizard, you can determine the number of sections, tables, rows, and seats you need; and you can name your sections, tables, rows, and seats when it is beneficial.

Once you finish setting up your seating arrangements on the Seating Setup Wizard, the Seating screen appears. From the Seating screen, you can quickly and easily assign participants 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. You can also automatically assign participants to seats when you have no particular pattern to follow. As you assign participants to seats, you can run a Seating Validation Report to help determine whether any conflicts or problems exist.

For example, you host a Health Awareness class with a capacity of 100. Your classroom has two sections with 10 tables of seating. Each table contains five seats. With the Seating Setup Wizard, you easily establish two sections of seating and set up the seating by 10 tables with five seats each. To make it easy for participants to find their seats, you decide to name your sections and tables. You name your sections “Left Section” and “Right Section” and color-code the tables. After you set up your seating arrangements, you assign each participant to a seat from the Seating screen. As participants register for the class and tell you about their guests or request to sit with other participants, you add these participants to groups and assign each group to a table together, when possible. As you assign participants to seats, you run the Seating Validation Report at intervals to ensure your groups sit together, guests are seated with their hosts, and everyone gets seated properly.

Note: From *Reports*, you can run a Seating Arrangements Report to generate a list of seating assignments for your participants by section, table, row, and seat. You can also run a Seating Validation Report to help resolve seating issues. For information, see the *Reports Guide*.

After you set up your seating and assign participants to seats, at any time you can click **Setup** on the Seating screen to access the Seating Setup Wizard to change your seating arrangements. Just be careful when doing so; you can lose seating assignments. The program warns you when this is the case.

In this section of the guide, we discuss how to use the Seating Setup Wizard to set up seating arrangements from the General tab of the event record. We introduce you to and explain each frame of the Seating screen. We then discuss procedures you should think about before you assign participants to seats. After that, we go through procedures you can use to assign your participants, both individually and in groups, to seats. Then, we introduce you to the Seating Validation Report. For convenience, on the General tab of the participant record, you can also access the Seating Setup Wizard and Seating screen to accomplish all these tasks. What you learn in this section of the guide, you can use on the General tab of the participant record, as well.

On the General tab of the participant record, you can also indicate when a participant does not need to be assigned to a seat, add group and seating notes for the participant, and add a participant to a group even in advance of knowing your event venue and setting up seating arrangements. For information about these procedures, see “Set Up Seating on the Participant Record” on page 151.

Seating Setup Wizard

Note: On the General tab of a participant record, you may decide to add the participant to a group before you set up your seating arrangements. When you do this, the Seating Setup Wizard does not appear the first time you click **Seating**. The Seating screen appears. To set up seating arrangements, click **Setup** in the **Seats** frame of the Seating screen at any time. For information about seating on the participant record, see, “Set Up Seating on the Participant Record” on page 151.

To initially set up your seating arrangements (your seating layout template), you can click **Seating** on the General tab of the event record or participant record. When you click **Seating** the first time, the Seating Setup Wizard appears. With the wizard, decide how to arrange your seating. You can set up **Sections, Tables, and Seats**; **Sections, Rows, and Seats**; or just **Sections and Seats**. With the wizard, you can determine the number of sections, tables, rows, and seats you need; name your sections, tables, rows, and seats when you find it helpful; and decide whether to use continuous numbering across sections, tables, or rows.

When you finish setting up your seating arrangements from the Seating Setup Wizard, the Seating screen appears. From the Seating screen, you can quickly and easily assign your participants to seats. For information about the Seating screen, see “Introduction to the Seating Screen” on page 58.

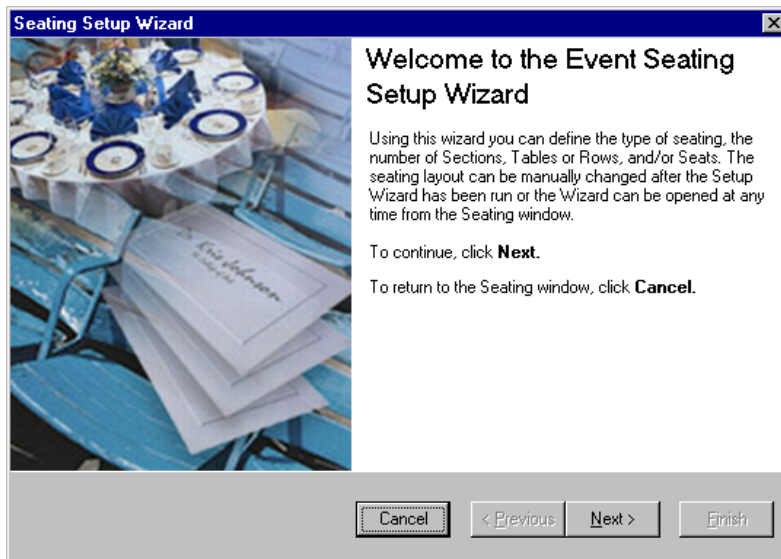
Once you establish seating arrangements on an event record, you may want to use the same seating arrangements for another event. Instead of setting up the same seating arrangements again, you can copy the existing arrangements (template) from one event record to another to save time.

Seating Setup Wizard Screens

The Seating Setup Wizard consists of several consecutive screens. When you decide to arrange your seating by **Sections, Tables, and Seats** or **Sections, Rows, and Seats**, the Seating Setup Wizard has five screens: (1) Welcome to the Seating Setup Wizard, (2) Seating Layout, (3) Sections, (4) Tables or Rows, and (5) Seats. When you arrange your seating by **Sections and Seats**, the wizard has four screens: (1) Welcome to the Seating Setup Wizard, (2) Seating Layout, (3) Sections, and (4) Seats.

To move forward from one screen to the next, click **Next**. To return to a screen, click **Previous**. At any time, you can click **Cancel** to close the Seating Setup Wizard and stop setting up your seating arrangements. When you finish setting up your arrangements, you must click **Finish**.

Welcome to the Seating Setup Wizard screen. On the Welcome to the Seating Setup Wizard screen, you begin to set up your seating arrangements. To initially access this screen, click **Seating** on the General tab of the event record or participant record. Once you set up your seating and click **Finish** on the wizard, you can access the Seating Setup Wizard at any time from the **Setup** button on the action bar of the **Seats** frame on the Seating screen.



Seating Layout screen. On the Seating Layout screen, you decide how to divide your seating arrangements.

- When you select **Sections, Tables, and Seats**, the **No. of sections**, **No of tables per section**, and **No. of seats per table** fields appear.

Note: To change the way you divided your seating, select another option in the **Seating is divided into** field and change your values in the fields. Once you click **Finish** on the Seating Setup Wizard, the values in the **No.** fields are disabled and a **Reset values** button appears. You can click **Reset values**, enter new numbers in the fields, and start to set up your seating arrangements again.

- When you select **Sections, Rows, and Seats**, the **No. of sections**, **No of rows per section**, and **No. of seats per row** fields appear.
- When you select **Sections and Seats**, the **No. of sections** and **No. of seats per section** fields appear.

Once you decide how to divide your seating and enter numbers in the fields, the **Total seating capacity** field updates to reflect your decisions.

Also on the Seating Layout screen, you can click the **Copy from another Event** button to copy seating arrangements (a template) from one event record to another.

Seating Setup Wizard

Seating Layout

Seating can be divided into Sections\Tables\Seats, Sections\Rows\Seats, or Sections\Seats.

Seating is divided into: ☒ Sections, Tables, and Seats
☐ Sections, Rows, and Seats
☐ Sections and Seats

No. of sections: 2
No. of tables per section: 5
No. of seats per table: 5

Total seating capacity: 50

Copy from another Event... Cancel < Previous Next > Finish

Sections screen. On the Sections screen, you can change the default section names to more meaningful names than Section 1, Section 2, etc.

When you select **Sections, Tables, and Seats** or **Sections, Rows, and Seats**, you can change the number of tables or rows in each section and change the starting number for each table or row within each section.

When you select **Sections and Seats**, you can change the number of seats in each section and the starting number for the seats within each section.

Note: On the Sections screen, when you use continuous numbering, the numbering runs across sections. For example, if you set up two sections with five tables in each section and mark **Use continuous numbering**, the tables are numbered 1 - 5 in Section 1 and 6 - 10 in Section 2. Without continuous numbering, the tables are numbered 1 - 5 in each section.

On the Sections screen, you can also determine whether to use continuous numbering across your sections.

Seating Setup Wizard

Sections

For each Section, you may specify the name, the number of Tables per section, and the starting Table number.

☐ Use continuous numbering

Section Number	Section Name	Number of Tables	Starting Table Number	Ending Table Number
1	Section 1	5	1	5
2	Section 2	5	1	5

Cancel < Previous Next > Finish

Tables or Rows screen. The Tables or Rows screen appears only when you select **Sections, Tables, and Seats** or **Sections, Rows, and Seats**. On the Tables or Rows screen, you can select a section, and within that section, you can give your tables or rows more meaningful names than Table 1, Table 2, Row 1, Row 2, etc.

You can change the number of seats for a table or row and change the starting seat number of each table or row.

Note: On the Tables or Rows screen, when you use continuous numbering, the numbering runs across tables or rows. For example, if you set up a section of five tables with five seats at each table and mark **Use continuous numbering**, the seats are numbered 1 - 5 at Table 1, 6 - 10 at Table 2, 11 - 15 at Table 3, 16 - 20 at Table 4, and 21 - 25 at Table 5. Without continuous numbering, the seats are numbered 1 - 5 at each table.

On the Tables or Rows screen, you can also determine whether to use continuous numbering across your tables or rows.

Seating Setup Wizard

Tables

For each Table, you may specify the name, the number of seats per Table, and the starting seat number.

Section: Section 1 ☐ Use continuous numbering

Table Number	Table Name	Number of Seats	Starting Seat Number	Ending Seat Number
1	Table 1	5	1	5
2	Table 2	5	1	5
3	Table 3	5	1	5
4	Table 4	5	1	5
5	Table 5	5	1	5

Cancel < Previous **Next >** Finish

Seats screen. On the Seats screen, when you select **Sections, Tables, and Seats** or **Sections, Rows, and Seats**, you can select a section and table or row within that section. You can then give each seat at that table or row a more meaningful name than Seat 1, Seat 2, etc.

When you select **Sections and Seats**, you can select a section and give each seat within that section a more meaningful name.

Seating Setup Wizard

Seats

You may specify a name for each seat.

Section: Section 1

Table: Table 1

Seat Number	Seat Name
1	Seat 1
2	Seat 2
3	Seat 3
4	Seat 4
5	Seat 5

Cancel

< Previous

Next >

Finish

► Set up seating arrangements

With the Seating Setup Wizard, you can quickly and easily set up seating arrangements according to the layout of your room or space. This procedure takes you through a scenario to divide your seating by sections, rows, and seats. You can follow this procedure when you select either of the other options: **Sections, Tables, and Seats** or **Sections and Seats**. Just remember, when you select **Sections, Tables, and Seats**, substitute “tables” for “rows” in the procedure. For **Sections and Seats**, you need no tables or rows. You can ignore those steps.

Scenario: You hold a Starlight Concert fundraiser and invite 1000 guests. You need to divide your seating arrangements into two sections — Left Orchestra and Right Orchestra. Within each section, you want 20 rows with 25 seats per row. You do not want to use continuous numbering across sections or rows. You want to name each row within each section a letter of the alphabet — A, B, C, etc. You decide to name each seat within each row with a coordinating letter and number, A-1, A-2, A-3, etc. Naming the sections, the rows within each section, and the seats within each row will make it easier for the participants to find their seats. With the Seating Setup Wizard, set up these seating arrangements.

1. From the Starlight Concert event record, select the General tab. For information about how to open an event record, see “Open an event record” on page 10.

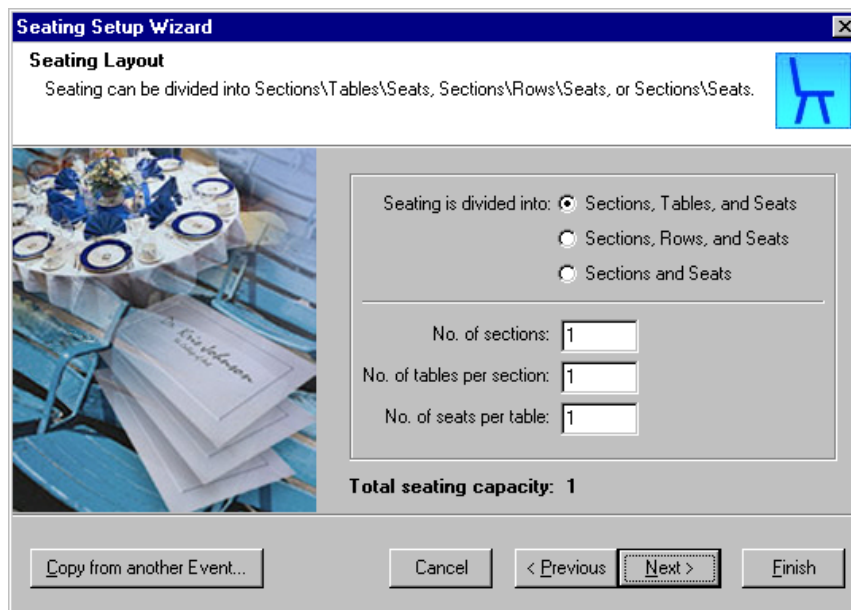
The screenshot shows the 'Starlight Concert' event record form. The 'General' tab is selected. The form includes fields for Name (Starlight Concert), ID (STAR), Category (Other), Description (In the Central Garden, the orchestra will provide a concert. All attendees must bring their own food and drinks. Gates open at 6:00 p.m. for garden tours and picknicking. Concert will begin sharply at 8:00 p.m.), Type (Social), Start date (08/21/2005), Start time (6:00 PM), Group (Summer Series of Fun), End date (08/21/2005), End time (11:00 PM), Campaign, Event goal (\$10,000.00), Location (Central Garden), Itinerary desc (Gates open at 6:00; Music begins), Capacity (1500), No. invited (1000), and checkboxes for 'Event is inactive' and 'Display on 'Calendar of Events''. At the bottom, it shows 'No. Participants: 29', 'No. Registered: 28', and 'No. Attended: 0'.

Note: On the General tab of a participant record, you may add the participant to a group before you set up your seating arrangements. When you do this, the Seating Setup Wizard does not appear the first time you click **Seating**. The Seating screen appears. To set up seating arrangements, you can click **Setup** in the **Seats** frame of the Seating screen at any time. For information about seating on the participant record, see, “Set Up Seating on the Participant Record” on page 151.

2. Click **Seating**. Because this is the first time you have set up any seating arrangements for this event, the Seating Setup Wizard appears and displays the Welcome to the Event Seating Setup Wizard screen.



3. Click **Next**. The Seating Layout screen appears.



4. In the **Seating is divided into** field, select **Sections, Rows, and Seats**. This is how you want to break out your seating. When you select **Sections, Rows, and Seats**, **No. of sections**, **No of rows per section**, and **No. of seats per row** fields appear. In each, enter a number to further break out your seating arrangements.

Note: On the Seating Setup Wizard, to change the way you divided your seating, select another option in the **Seating is divided into** field and change your values in the fields. Once you click **Finish** on the Seating Setup Wizard, the values in the fields are disabled and a **Reset values** button appears on the Seating Layout screen. You can click **Reset values**, enter new numbers in the fields, and start to set up your seating arrangements again.

5. In the **No. of sections** field, enter "2" to divide your seating into two sections.
6. In the **No. of rows per section** field, enter "20". You need 20 rows per section.
7. In the **No. of seats per row** field, enter "25". You want each row to have 25 seats.

8. Click **Next**. A progress bar appears. The program starts to generate your seating.

Note: At any time, you can click **Cancel** to close the Seating Setup Wizard and stop the setup of your seating arrangements. You should cancel before you click **Finish**.

Once the program generates your seating, the Sections screen appears. On the Sections screen, determine whether to use continuous numbering across your sections. You can give your sections more meaningful names than Section 1 or Section 2. You can also change the number of rows in a section and change the starting row number of each section.

Seating Setup Wizard

Sections

For each Section, you may specify the name, the number of Rows per section, and the starting Row number.

☐ Use continuous numbering

Section Number	Section Name	Number of Rows	Starting Row Number	Ending Row Number
1	Section 1	20	1	20
2	Section 2	20	1	20

Cancel < Previous Next > Finish

9. Leave **Use continuous numbering** unmarked. You want the numbering of your rows in both sections to remain 1 - 20.

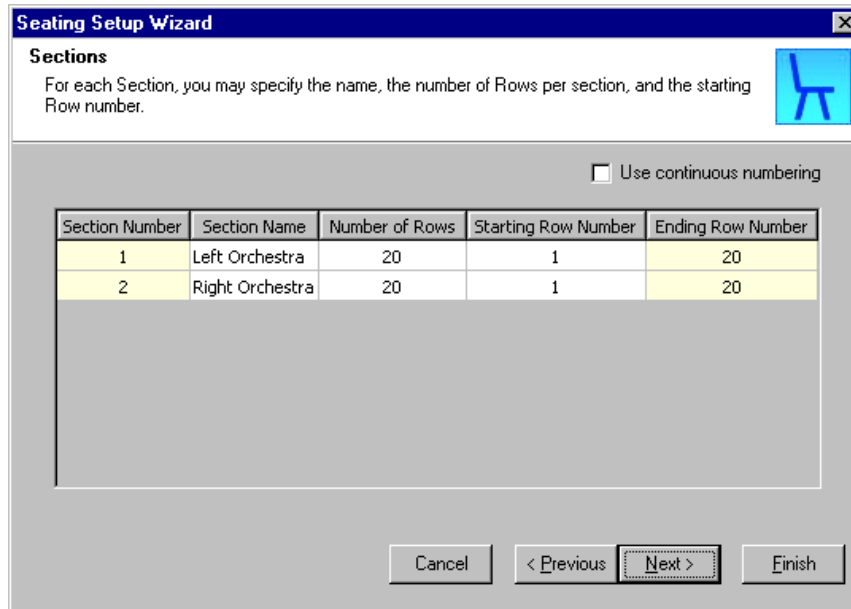
If you mark **Use continuous numbering**, the numbering becomes continuous across sections. The rows will be numbered 1 - 20 in Section 1 and 21 - 40 in Section 2.

Warning: When you name sections, you cannot use duplicate names. Each section must have a unique name.

10. In the **Section Name** column, change the names of your sections to more meaningful names, such as to help participants identify more easily where they sit. Beside **Section Number 1**, delete the **Section Name** "Section 1" and enter "Left Orchestra". Beside **Section Number 2**, delete the **Section Name** "Section 2" and enter "Right Orchestra".
11. In the **Number of Rows** column, leave the default number of rows (20 - the number you entered on the Seating Layout screen) for both **Section Number 1** and **Section Number 2**. You do not want to add or subtract any number of rows in either section.
12. In the **Starting Row Number** column, leave the default number (1) for both **Section Number 1** and **Section Number 2**. You want your rows in both sections to be numbered 1 - 20.

Warning: When you change a **Starting Row Number**, you can never manually change the **Ending Row Number**. The program changes this number to coordinate with the number in the **Starting Row Number** column. For example, for your 20 rows of seating, if you change the **Starting Row Number** from 1 to 3, the program automatically changes the **Ending Row Number** from 20 to 22. This still provides 20 rows of seating.

13. The **Ending Row Number** column is not editable. Because you did not change a number in the **Starting Row Number** column, the default number (20) remains in the **Ending Row Number** column for both sections.



Seating Setup Wizard

Sections
For each Section, you may specify the name, the number of Rows per section, and the starting Row number.

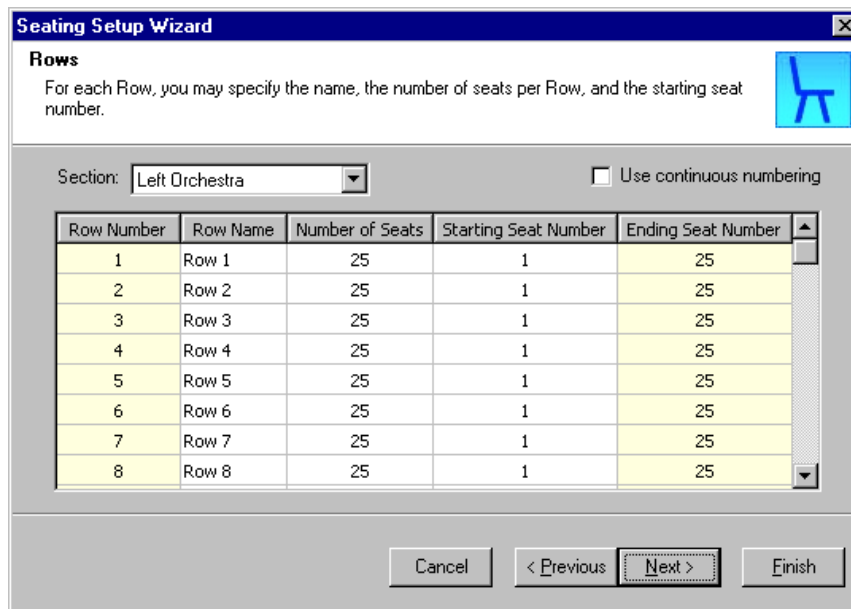
☐ Use continuous numbering

Section Number	Section Name	Number of Rows	Starting Row Number	Ending Row Number
1	Left Orchestra	20	1	20
2	Right Orchestra	20	1	20

Buttons: Cancel, < Previous, Next >, Finish

Warning: If on the Seating Layout screen, you divide your seating by **Sections and Seats** instead of **Sections, Tables, and Seats** or **Sections, Rows, and Seats**, the next screen that appears is the Seats screen. A Tables or Rows screen does not appear. When you divide your seating into **Sections and Seats**, you can skip to step 21. Step 21 in this procedure talks about Seats.

14. Click **Next**. The Rows screen appears. On this screen, determine whether to use continuous numbering across your rows. You can select a section, and within that section, give your rows more meaningful names than Row 1, Row 2, etc. You can also change the number of seats in a row and change the starting seat number of each row.



Seating Setup Wizard

Rows
For each Row, you may specify the name, the number of seats per Row, and the starting seat number.

Section: Left Orchestra ☐ Use continuous numbering

Row Number	Row Name	Number of Seats	Starting Seat Number	Ending Seat Number
1	Row 1	25	1	25
2	Row 2	25	1	25
3	Row 3	25	1	25
4	Row 4	25	1	25
5	Row 5	25	1	25
6	Row 6	25	1	25
7	Row 7	25	1	25
8	Row 8	25	1	25

Buttons: Cancel, < Previous, Next >, Finish

15. Leave **Use continuous numbering** unmarked. You want the numbering of seats in each row to remain 1 - 25. If you mark **Use continuous numbering**, the numbering becomes continuous across rows: in **Row Number 1**, seats 1 - 25; in **Row Number 2**, seats 26 - 50; in **Row Number 3**, seats 51 - 75; etc.

Warning: When you name tables and rows, you can give a table or row the same name in each section (one per section), but you cannot give multiple tables or rows within the same section the same name. For example, Table B can appear in three different sections, but three Table Bs cannot appear in Section 1.

16. You decided earlier to name each row in each section a letter of the alphabet. By alphabetizing the rows, you feel the participants can more quickly find their seats. In the **Section** field, select "Left Orchestra". The seating arrangements for the Left Orchestra appear.
17. In the **Row Name** column, beside **Row Number 1**, replace the name "Row 1" with "A". In the same column, beside **Row Number 2**, replace "Row 2" with "B". In the same column, beside **Row Number 3**, replace "Row 3" with "C". Continue to delete all default row names and enter the letters of the alphabet in order. When you finish, the rows in the Left Orchestra section are named A - T.
18. In the **Section** field, select "Right Orchestra" and name each row exactly as you did in step 17. When you finish, the rows in the Right Orchestra section are also named A - T.
19. In the **Number of Seats** column, leave the default number of seats (25 - the number you entered on the Seating Layout screen) for all rows in both the Left Orchestra and Right Orchestra. You do not want to add or subtract any number of seats in any row.

Warning: When you change a starting seat number, you cannot manually change the ending seat number. The program changes this number to coordinate with the number you enter in the **Starting Seat Number** column. For example, for your 25 seats per row, if you decide to change a starting seat number from 1 to 3, the program automatically changes the ending seat number from 25 to 27 to provide 25 seats on the row.

20. In the **Starting Seat Number** column, leave the default number (1) for all rows in both the Left Orchestra and Right Orchestra. You want seats within your rows to be numbered 1 - 25.

Seating Setup Wizard

Rows
For each Row, you may specify the name, the number of seats per Row, and the starting seat number.

Section: Right Orchestra ☐ Use continuous numbering

Row Number	Row Name	Number of Seats	Starting Seat Number	Ending Seat Number
1	A	25	1	25
2	B	25	1	25
3	C	25	1	25
4	D	25	1	25
5	E	25	1	25
6	F	25	1	25
7	G	25	1	25
8	H	25	1	25

Buttons: Cancel < Previous Next > Finish

Warning: When you name seats, you can give a seat the same name at each table or row (one per table or row), but you cannot give multiple seats at the same table or row the same name. For example, Seat B can appear at three different tables, but three Seat Bs cannot appear at Table 1.

21. Click **Next**. The Seats screen appears. On the Seats screen, you can select a section, and within that section, give your seats on each row more meaningful names than Seat 1, Seat 2, and so on.

Seating Setup Wizard

Seats
You may specify a name for each seat.

Section: Left Orchestra Row: A

Seat Number	Seat Name
1	Seat 1
2	Seat 2
3	Seat 3
4	Seat 4
5	Seat 5
6	Seat 6
7	Seat 7
8	Seat 8

Cancel < Previous Next > Finish

22. You made the decision earlier to name your seats with a coordinating letter and number. You decide to start to name the seats in the first row of the Left Orchestra. In the **Section** field, select "Left Orchestra". In the **Row** field, select "A". The seats in Row A of the Left Orchestra appear.
23. In the **Seat Name** column, beside **Seat Number 1**, replace the name "Seat 1" with "Seat A-1". In the same column, beside **Seat Number 2**, replace "Seat 2" with "Seat A-2". In the same column, beside **Seat Number 3**, replace "Seat 3" with "Seat A-3". Continue to change all default seat names in this order. When you finish, the seats in row A of the Left Orchestra are named *Seat A-1 - Seat A-25*.

Note: Once you finish naming the seats on all rows of the Left and Right Orchestra, you will have Seat A-1 - Seat A-25 all the way through Seat T-1 - Seat T-25 in both sections.

24. Continue to name the seats in all rows of the Left Orchestra in this fashion. When you finish, change all seats in all rows of the Right Orchestra exactly as you did in step 23.

Seating Setup Wizard

Seats
You may specify a name for each seat.

Section: Row:

Seat Number	Seat Name
1	Seat A-1
2	Seat A-2
3	Seat A-3
4	Seat A-4
5	Seat A-5
6	Seat A-6
7	Seat A-7
8	Seat A-8

Warning: If you use continuous numbering across sections, tables, or rows, when you click **Finish**, the continuous numbering you set up appears under **Seats**. However, on the Seating Setup Wizard, the **Use continuous numbering** checkbox defaults back to unmarked on the Sections, Tables, or Rows screens.

25. Click **Finish**. The Seating screen appears. Under **Seats**, your seating arrangements appear. To view the rows within a section, click the plus sign beside the section. To view the seats within a row click the plus sign beside the row. You can now start to seat your participants.

Seating for Starlight Concert

File Edit View Favorites Tools Help

Save and Close

Participants
Assign to Section Add to Group Show: All Participants Filter: <No Filter>

Name	Event Seat	Host Name
Kristy Graham		
Cynthia T. Miller		
Andrew Greshaw		
Allison D. Goodson		
Jeffrey B. Goodson		
Geoffrey T. Beckner		
Zachery J. Clover		
Ryan K. Dorrien		

Groups
New Group Delete Group Assign to Section Show Notes

Groups for Starlight Concert

Seats
New Section Delete Section Setup

Seating for Starlight Concert

- 1 - Left Orchestra
 - 1 - A
 - 1 - Seat A-1
 - 2 - Seat A-2
 - 3 - Seat A-3
 - 4 - Seat A-4
 - 5 - Seat A-5
 - 6 - Seat A-6
 - 7 - Seat A-7
 - 8 - Seat A-8
 - 9 - Seat A-9
 - 10 - Seat A-10
 - 11 - Seat A-11
 - 12 - Seat A-12
 - 13 - Seat A-13
 - 14 - Seat A-14
 - 15 - Seat A-15
 - 16 - Seat A-16
 - 17 - Seat A-17
 - 18 - Seat A-18
 - 19 - Seat A-19
 - 20 - Seat A-20
 - 21 - Seat A-21
 - 22 - Seat A-22
 - 23 - Seat A-23

Total seats: 1000 No. seats assigned: 0 Vacant seats: 1000

Note: After you initially run the Seating Setup Wizard and finish setting up your seating arrangements, when you click **Seating** on the General tab of the event record or participant record, the Seating screen appears. For information about the Seating screen, see “Introduction to the Seating Screen” on page 58.

26. To save your seating arrangements and close the Seating screen, click **Save and Close** on the toolbar. You return to the General tab of the Starlight Concert event record. Beside the **Seating** button, the seating capacity and the number of available seats appear. As you assign participants to seats, the number of available seats decrease.
27. On the toolbar, click **Save and Close**.

► **Copy seating arrangements from one event to another**

Warning: When you copy seating arrangements from one event record to another, any participant seating assignments on the original event record do not copy over to the recent event record.

To save time, you can copy seating arrangements (a template) from one event record to another. When you copy seating arrangements, the entire structure — sections, tables, rows, seats, names, and numbers — copies from the original event record to your recent event record. If you used continuous numbering on the original event record, the continuous numbering sequence(s) also copy over to the recent event record.

This procedure takes you through a scenario where you copy seating arrangements (a template) divided by **Sections, Rows, and Seats**. You can follow this procedure to copy seating arrangements divided by one of the other selections: **Sections, Tables, and Seats** or **Sections and Seats**. When you use **Sections, Tables, and Seats**, substitute “tables” for “rows” in the procedure. For **Sections and Seats**, you have no tables or rows.

Scenario: You previously set up seating arrangements for your Starlight Concert event. You hold your Spring Auction very soon. You feel the seating arrangements you set up on the Starlight Concert event record work well for the Spring Auction. Copy the seating arrangements (the template) from the Starlight Concert event record to the Spring Auction event record. If you have not set up seating arrangements for the Starlight Concert, see “Set up seating arrangements” on page 45.

Note: This procedure takes you through the process to copy seating arrangements from an original event record to a recent event record for which you have not yet set up seating arrangements. You can copy seating arrangements from one event record to another at any time. After you set up seating, click **Seating** on the General tab of the event record or participant record (or if before you set up seating, you added a participant to a group), you can click **Setup** in the **Seats** frame of the Seating screen to access the Seating Setup Wizard.

1. From the Spring Auction event record, select the General tab. For information about how to open an event record, see “Open an event record” on page 10.

The screenshot shows a software window titled "Spring Auction" with a menu bar (File, Edit, View, Event, Favorites, Tools, Help) and a toolbar. Below the toolbar are tabs for Actions, Attributes, Media, and Notes. Under the Actions tab, there are sub-tabs: General (selected), Prices, Expenses, Jobs, and Participants. The General tab contains the following fields:

- Name: Spring Auction
- ID: AUCTION
- Category: ☐ Sporting event, ☐ Dinner, ☐ Class, ☒ Other
- Description: The Spring Auction will be held on April 2 at the Morrison Auditorium. Hundreds of items will be available for preview the night before and during the auction. Light refreshments will be offered during the auction.
- Type: Social (dropdown)
- Start date: 04/02/2005, Start time: 7:00 PM
- Group: Auction (dropdown)
- End date: 04/02/2005, End time: 10:00 PM
- Campaign: (dropdown)
- Event goal: \$25,000.00
- Location: Morrison Auditorium
- Itinerary desc: (text area)
- Seating: Seating has not been set up for this event.
- Capacity: 200, No. invited: 375
- ☐ Event is inactive, ☒ Display on 'Calendar of Events'
- No. Participants: 0, No. Registered: 0, No. Attended: 0

Note: After you initially run the Seating Setup Wizard and finish setting up your seating arrangements, when you click **Seating** on the General tab of the event record or participant record, the Seating screen appears. For information about the Seating screen, see “Introduction to the Seating Screen” on page 58.

2. Click **Seating**. Because this is the first time you have set up any seating arrangements for this event, the Seating Setup Wizard appears and displays the Welcome to the Event Seating Setup Wizard screen.

The screenshot shows a window titled "Seating Setup Wizard" with a close button (X). On the left is a photograph of a round table set for a formal dinner with blue and white linens and glassware. On the right, the text reads:

Welcome to the Event Seating Setup Wizard

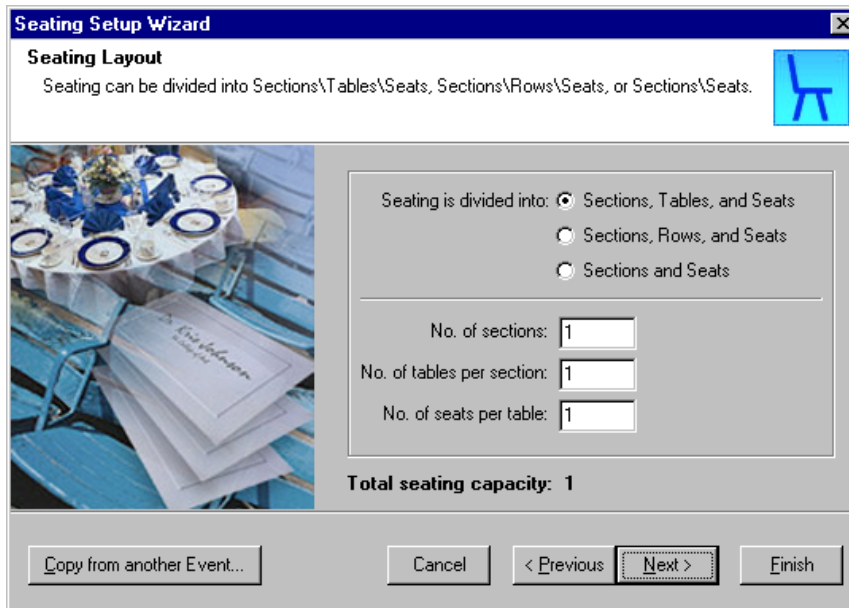
Using this wizard you can define the type of seating, the number of Sections, Tables or Rows, and/or Seats. The seating layout can be manually changed after the Setup Wizard has been run or the Wizard can be opened at any time from the Seating window.

To continue, click **Next**.

To return to the Seating window, click **Cancel**.

At the bottom are four buttons: Cancel, < Previous, Next >, and Finish.

3. Click **Next**. The Seating Layout screen appears.



Seating Setup Wizard

Seating Layout
Seating can be divided into Sections\Tables\Seats, Sections\Rows\Seats, or Sections\Seats.

Seating is divided into: ☒ Sections, Tables, and Seats
☐ Sections, Rows, and Seats
☐ Sections and Seats

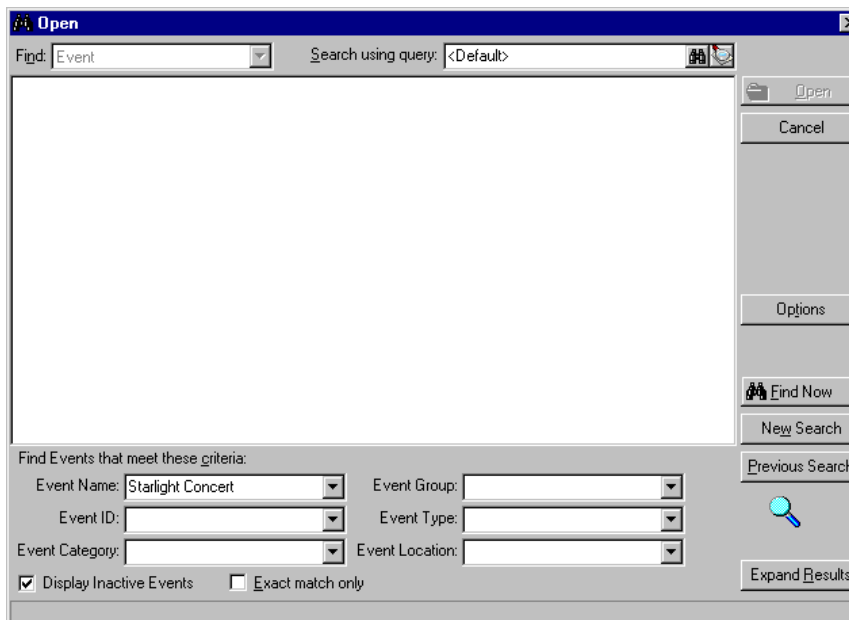
No. of sections:
 No. of tables per section:
 No. of seats per table:

Total seating capacity: 1

4. Click **Copy from another Event**. The Open screen for events appears.

Warning: If you already have seating arrangements set up on the Spring Auction event record, when you click **Copy from another Event**, a message appears to tell you all existing seating setup will be overwritten. To continue to the Open screen, click **Yes**. To stop copying seating arrangements, click **No**.

5. In the **Event Name** field, enter "Starlight Concert".



Open

Find: Search using query:

Find Events that meet these criteria:

Event Name: Event Group:
 Event ID: Event Type:
 Event Category: Event Location:

☒ Display Inactive Events ☐ Exact match only

6. Click **Find Now**. The Starlight Concert event record appears in the grid.

The 'Open' dialog box displays a search interface. At the top, there's a 'Find:' dropdown set to 'Event' and a 'Search using query:' field set to '<Default>'. Below this is a table with columns: Event Name, Event ID, Event Category, Event Type, and Event Location. The first row shows 'Starlight Concert', 'STAR', 'Other', 'Social', and 'Summer S'. To the right of the table are buttons for 'Open', 'Cancel', 'Options', 'Find Now', 'New Search', 'Previous Search', and 'Expand Results'. At the bottom, there are search criteria fields: 'Event Name' (Starlight Concert), 'Event Group', 'Event ID', 'Event Type', 'Event Category', and 'Event Location'. There are also checkboxes for 'Display Inactive Events' (checked) and 'Exact match only'. A status bar at the bottom indicates '1 record found.'

Note: On the Seating Layout screen of the Seating Setup Wizard, to change the way you divide your seating, select another option in the **Seating is divided into** field and change your values in the fields. Once you click **Finish** on the Seating Setup Wizard, the values in the fields are disabled and a **Reset values** button appears on the Seating Layout screen. You can click **Reset values**, enter new numbers into the fields, and start to set up your seating arrangements again.

7. Select the Starlight Concert event record and click **Open**. The Sections screen appears and displays the seating arrangements you previously set up on the Starlight Concert event record.

The 'Seating Setup Wizard' - Sections screen shows instructions: 'For each Section, you may specify the name, the number of Rows per section, and the starting Row number.' There's a checkbox for 'Use continuous numbering' which is unchecked. Below is a table with columns: Section Number, Section Name, Number of Rows, Starting Row Number, and Ending Row Number. The table contains two rows: 1 Left Orchestra (20 rows, starting at 1, ending at 20) and 2 Right Orchestra (20 rows, starting at 1, ending at 20). At the bottom are buttons for 'Cancel', '< Previous', 'Next >', and 'Finish'.

Section Number	Section Name	Number of Rows	Starting Row Number	Ending Row Number
1	Left Orchestra	20	1	20
2	Right Orchestra	20	1	20

Warning: When you name sections, you cannot use duplicate names. Each section must have a unique name. When you name tables or rows, you can have duplicate names in different sections, but no duplicate names at the same table or row. When you name seats, you can have duplicate names at different tables or rows, but no duplicate names at the same table or row.

8. You decide to tweak the seating arrangements just a little for the Spring Auction. In the **Seating Name** column, change “Left Orchestra” to “Left Section”. Change “Right Orchestra” to “Right Section”. These are more appropriate section names for the auction. The changes you make here do not affect the original seating arrangements on the Starlight Concert event record. They change only for the Spring Auction event record.

Seating Setup Wizard

Sections
For each Section, you may specify the name, the number of Rows per section, and the starting Row number.

☐ Use continuous numbering

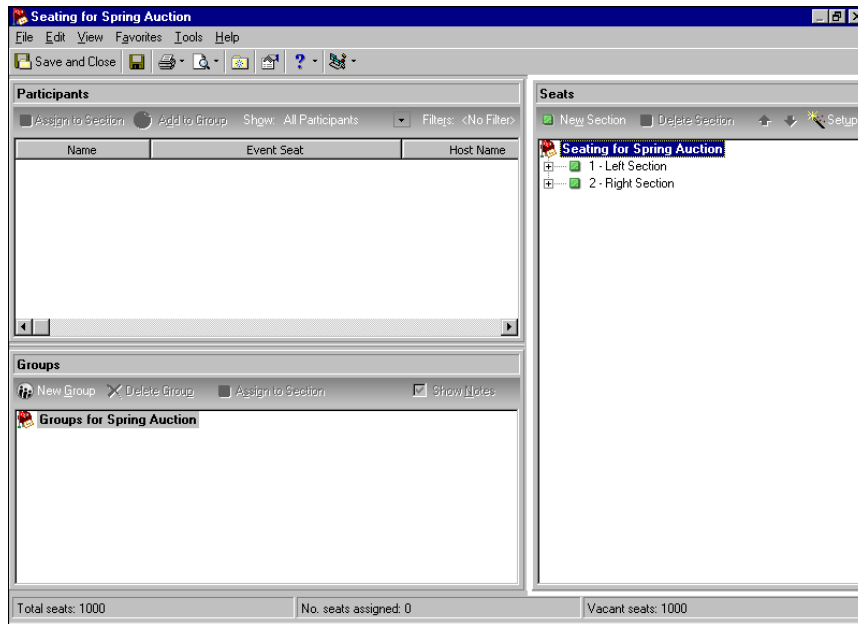
Section Number	Section Name	Number of Rows	Starting Row Number	Ending Row Number
1	Left Section	20	1	20
2	Right Section	20	1	20

Cancel < Previous Next > Finish

9. To go to the Rows screen, click **Next**. To go to the Seats screen, click **Next** again. On any screen, you can adjust your seating arrangements. On the Rows screen, perhaps you want to add an extra row to each section. Maybe you need to mark **Use continuous numbering**. Or, on the Seats screen, you decide to add two extra seats to a row.

Note: At any time, you can click **Setup** under **Seats** of the Seating screen to access the Seating Setup Wizard to change your seating arrangements. Just be careful when you do so. If you already assigned participants to seats, you can lose seating assignments. The program warns you when this is the case.

10. After you adjust your seating arrangements, click **Finish**. The Seating screen appears. Under **Seats**, your seating arrangements appear. To view the rows within a section, click the plus sign beside the section. To view the seats within that row, click the plus sign beside the row. You can now start to seat participants.



11. To save your seating arrangements and close the Seating screen, click **Save and Close** on the toolbar. You return to the General tab of the Spring Auction event record.
12. On the toolbar, click **Save and Close**.

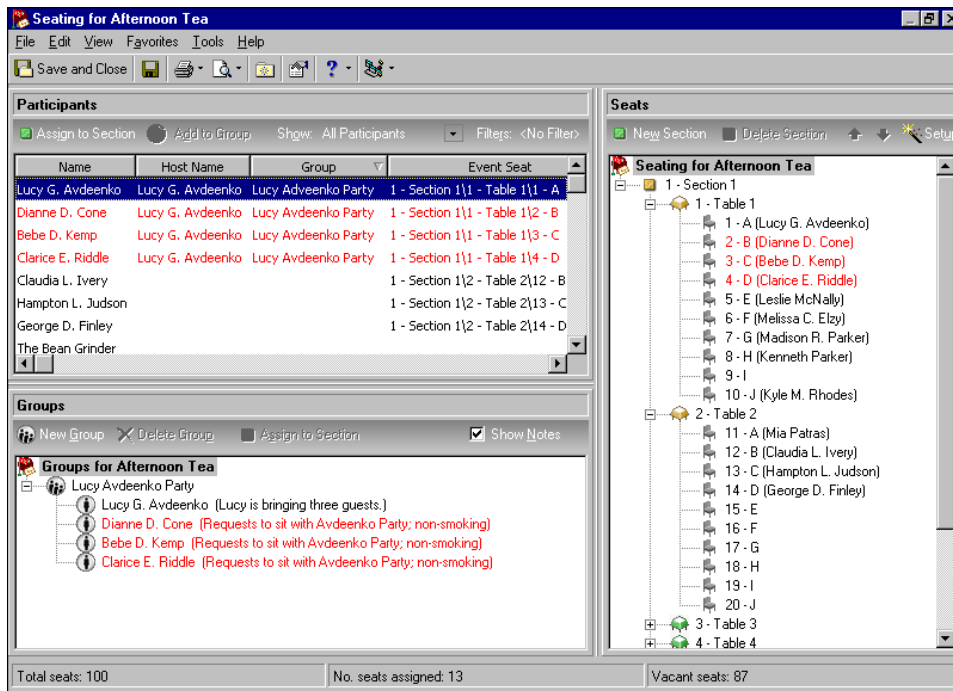
Introduction to the Seating Screen

Note: You can export the contents of the grid in the **Participants**, **Groups**, or **Seats** frames to Microsoft *Excel* or another program. From the **Participants**, **Groups**, or **Seats** frame, right-click in the grid. A menu appears. To export information to a data file that you can use in another program, select **Export [Participants, Groups, or Seats] Grid**. If you have Microsoft *Excel*, select **Export [Participants, Groups, or Seats] Grid to Excel** to export information to *Excel*. The information appears in a spreadsheet. You can also click in a frame and select **Export [Participants, Groups, or Seats] Grid** or **Export [Participants, Groups, or Seats] Grid to Excel** from the menu bar.

Once you finish setting up your seating arrangements using the Seating Setup Wizard, the Seating screen appears. From now on, unless you delete your seating arrangements, when you click **Seating** on the General tab of the event record, the Seating screen automatically appears. On the Seating screen, you set up your seating user options, set up participant legend colors and formatting, view event seating properties, assign participants individually or in groups to their seats, delete all seating arrangements, and print your Seating Validation Report. At the bottom of the Seating screen, a status bar displays **Total seats**, **No. seats assigned**, and **Vacant seats**.

From the Seating screen, you manage all your seating arrangements for a specific event. You can also access the Seating screen, as well as the Seating Setup Wizard from the General tab of a participant record. In “Set Up Seating on the Participant Record” on page 151, we talk about how to access these screens from the participant record. You can apply the topics we discuss here in both places.

The Seating Screen contains a toolbar, menu bar, **Participants** frame, **Groups** frame, and a **Seats** frame. From each, you perform different seating tasks. On the Seating screen, you can decide which of the three frames to display.



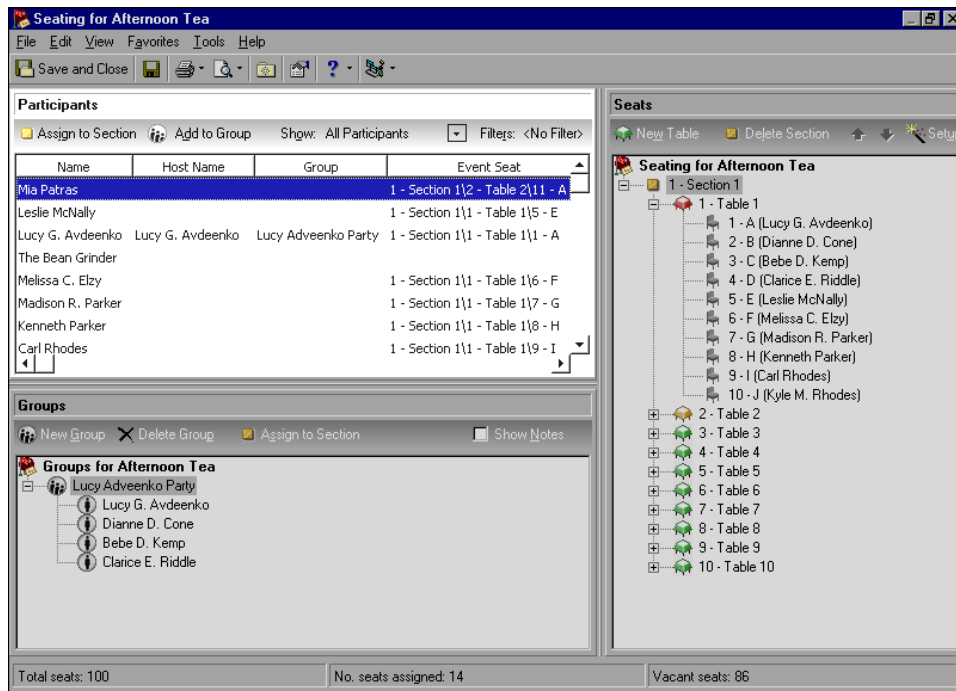
Participants Frame

Note: For information about how to add participants to an event record, see “Add Participants” on page 123.

The **Participants** frame shows the names of the participants (registrants, guests, and sponsors) added to the event from the Participants tab of the event record. The list of participants in the grid of the **Participants** frame excludes those participants who have **Do not seat this Participant** marked on the General tab of their participant record. Each time you add a participant from the Participants tab and leave **Do not seat this Participant** unmarked, the participant appears in the grid. For information about the **Do not seat this Participant** checkbox on the participant record, see “Make sure a participant is not assigned to a seat” on page 152.

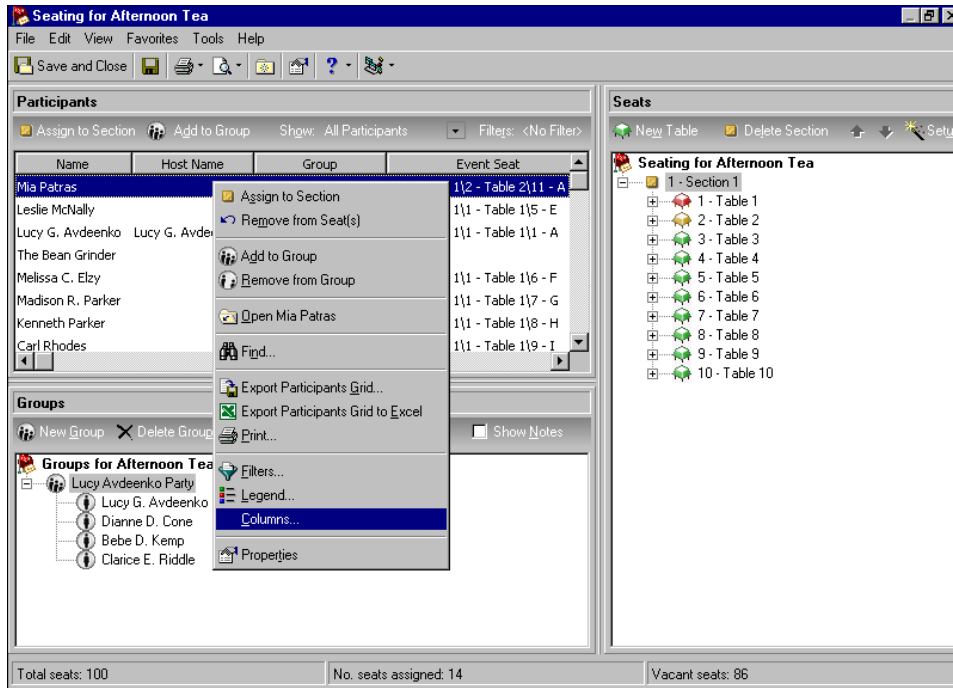
Tip: To quickly find a participant in the **Participants** frame, click in the grid and right-click. From the menu that appears, select **Find**. The Find screen appears. On the Find screen, use the **Field**, **Find what**, and **Match** fields to narrow down your search. For information about using the **Find** functionality in *The Raiser’s Edge*, see the *Program Basics Guide*.

If you set up seating legend options, your participants appear in the selected colors and formats. For information about how to set seating legend options, see “Event Seating Legend” on page 66. For convenience, from the **Participants** frame, you can double-click a participant name to open that participant record to view or edit.

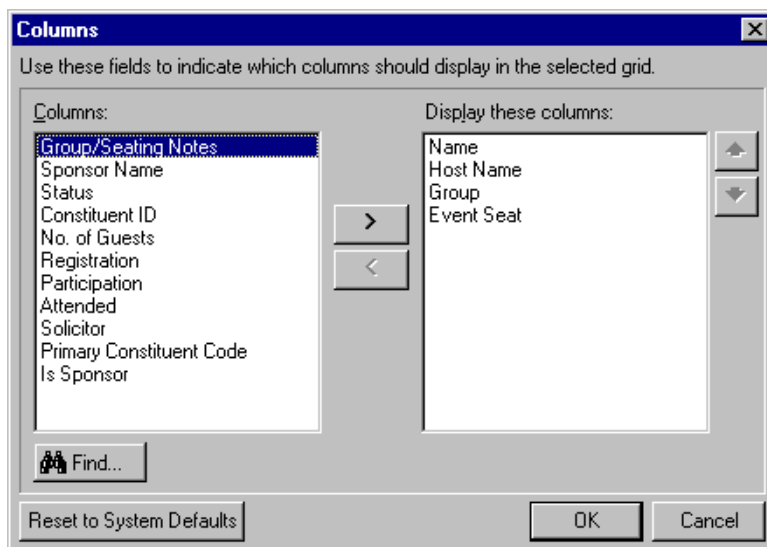


Note: Under **Participants**, you can sort the way participants appear in the grid. Click a column header to sort in ascending or descending order. For example, click the **Name** column to sort participants by last name in ascending or descending order. Click the **Group** column to sort your groups by group name in ascending or descending order. For more information about how to sort within grids in *The Raiser's Edge*, see the *Program Basics Guide*.

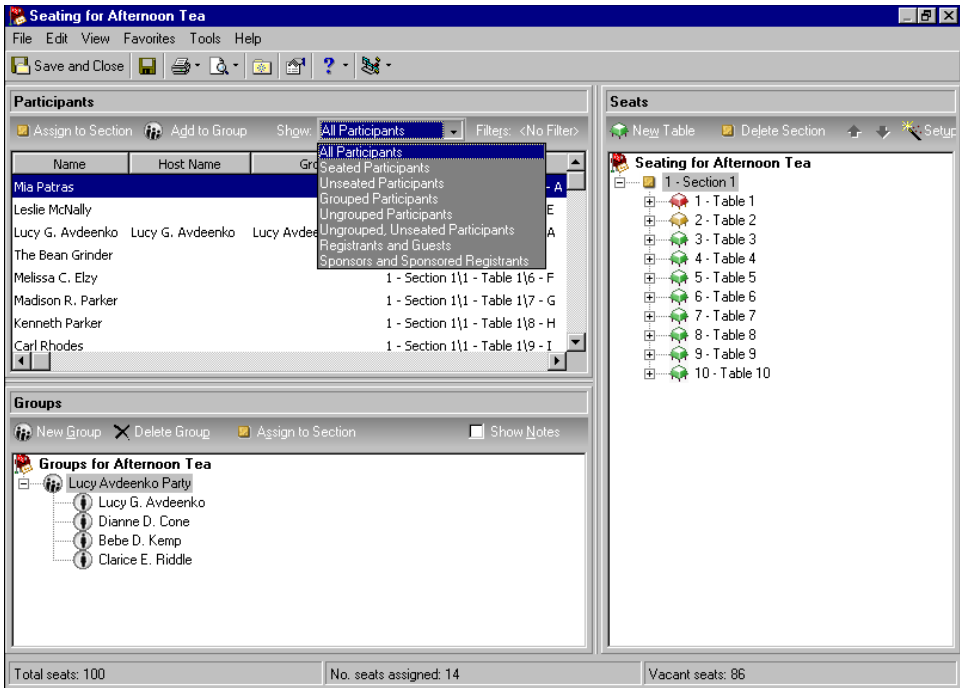
The default columns that appear in the grid in the **Participants** frame are **Name** (participant name), **Host Name** (name of any participant who is bringing guests), **Group** (from the **Groups** frame), and **Event Seat** (section, table or row, seat number). To add columns to this frame, right-click on the grid and select **Columns** from the menu. The Columns screen appears.



On the Columns screen, you can select from a list of columns, such as **Group/Seating Notes**, **Sponsor Name**, **Status**, **Constituent ID**, **No. of Guests**, **Registration**, **Participation**, **Attended**, **Solicitor**, **Primary Constituent Code**, and **Is Sponsor**. You can decide which columns provide the most helpful information from the participant record.



Under **Participants**, you can click **Show** on the action bar above the grid to determine who to view in the grid. You can select to view All Participants; Seated Participants; Unseated Participants; Grouped Participants; Ungrouped Participants; Ungrouped, Unseated Participants; Registrants and Guests; and Sponsors and Sponsored Registrants.



To further filter what appears in the grid, click **Filters** on the action bar and complete the **Registration**, **Participation**, **Status**, **Attended**, **Solicitor**, and **Constituent Code** fields on the Filters screen that appears.



Warning: When you set up your seating arrangements by **Sections and Seats**, instead of **Sections, Tables, and Seats** or **Sections, Rows, and Seats**, you always assign participants from the **Participants** frame to seats within sections of the **Seats** frame. You have no tables or rows.

Under **Participants**, you can quickly and easily assign each participant to a seat at a table, row, or section of the **Seats** frame. You can assign each participant to a seat one-at-a-time, or you can select multiple participants and assign them simultaneously to seats. To assign participants to a section, table, row, or seat, click **Assign to** on the action bar of the **Participants** frame, or drag and drop them from the **Participants** frame to the **Seats** frame.

Under **Participants**, you can add participants who request to sit together to groups you create under **Groups**. To assign participants to a group under **Groups**, click **Add to Group**, or drag and drop them from the **Participants** frame to a group in the **Groups** frame.

Groups Frame

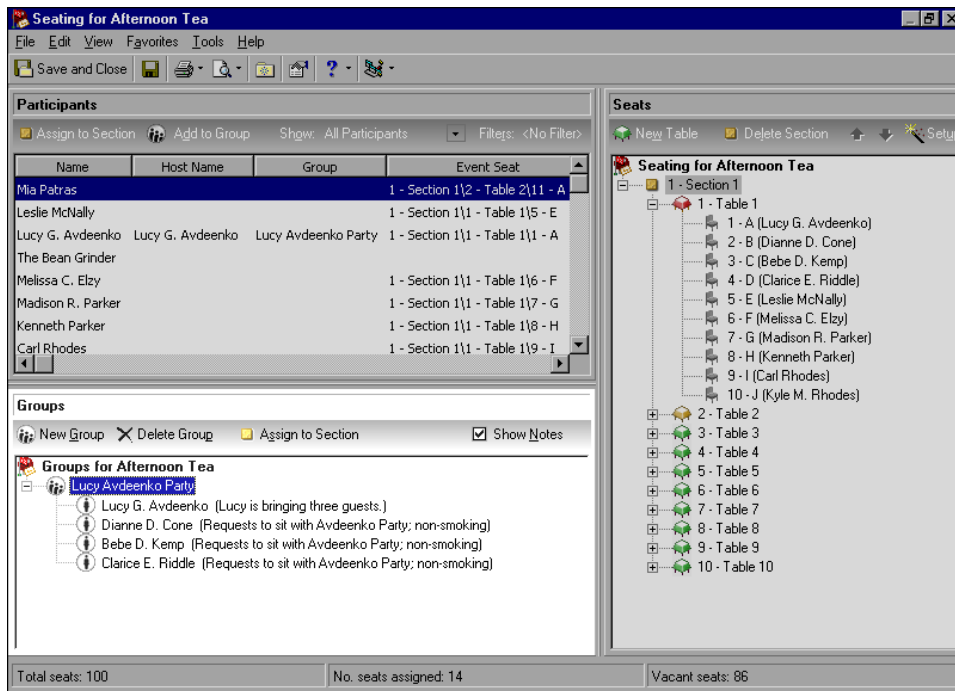
Under **Groups**, you can click **New Group** on the action bar to create a new group for participants who want to sit together. Once you create and name a group, to add participants to the group, click **Add to Group** on the action bar of the **Participants** frame. Once you create and add participants to a group, you can assign the entire group to a section, table, or row in the **Seats** frame by using the **Assign to** button on the action bar, or dragging and dropping the entire group from the **Groups** frame to the **Seats** frame.

Note: For information about how to add participants to an event record, see “Add Participants” on page 123.

On the action bar of the **Groups** frame, a **Show Notes** checkbox appears. When you mark this checkbox, any notes you added in the **Group/seating notes** field on the General tab of the participant record appear. On the General tab of the participant record, in the **Group/seating notes** field, you can enter helpful notes to remember about a participant’s group or seating requests. For example, when participants ask to sit with a particular group, you can note this on their participant records. When participants request to sit in areas such as smoking or non-smoking/outside or inside, you can add that sort of information. These notes help you determine where to seat participants in the **Seats** frame. For information about **Group/seating notes** on the participant record, see “Add group and seating notes for a participant” on page 154.

Tip: To quickly find a group or a participant in a group under **Groups**, click in the grid and right-click. From the menu that appears, select **Find**. The Find screen appears. On the Find screen, use the **Find what** and **Match** fields to narrow down your search. For information about using the **Find** functionality in *The Raiser’s Edge*, see the *Program Basics Guide*.

If you set up seating legend options, the participants that appear within groups under **Groups** appear in the selected colors and formats. For information about setting seating legend options, see “Event Seating Legend” on page 66.



Seats Frame

Tip: To quickly find a section, table, row, seat, or participant in the **Seats** frame, click in the grid and right-click. From the menu that appears, select **Find**. The Find screen appears. On the Find screen, use the **Find what** and **Match** fields to narrow down your search. For information about the **Find** functionality in *The Raiser's Edge*, see the *Program Basics Guide*.

Once you set up your seating arrangements with the Seating Setup Wizard, your seating arrangements appear in the **Seats** frame. Here, 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. For convenience, under **Seats**, you can double-click a participant name to open that participant record to view or edit.

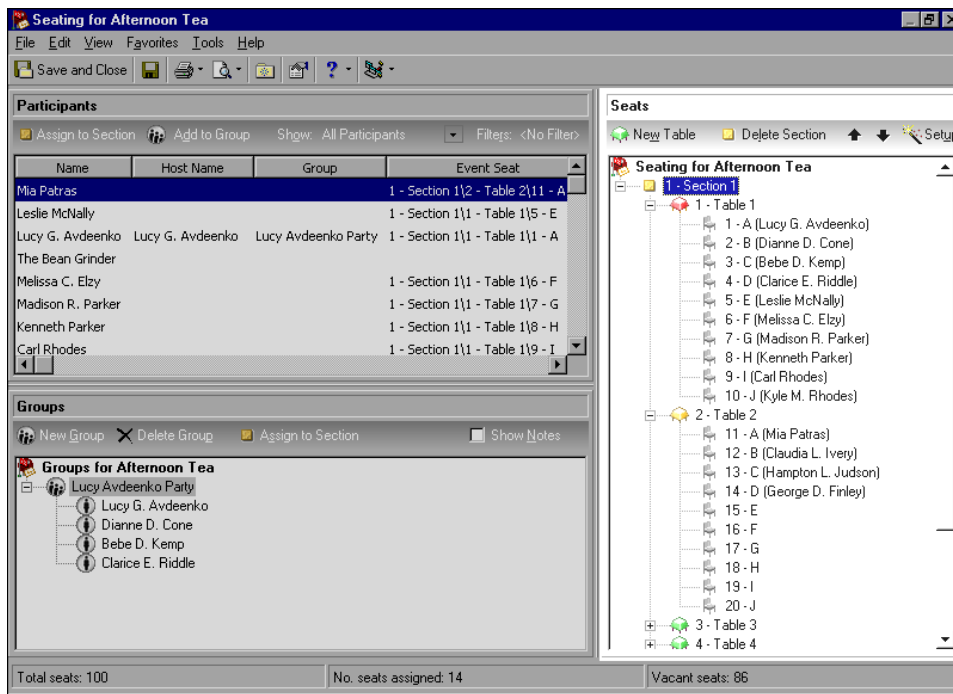
As you assign participants under **Participants** to a section, table, row, or seat under **Seats**, or a group under **Groups** frame to a section, table, or row under **Seats**, each participant name appears beside the assigned seat. The legend colors and format you applied to the participants appear in this grid. You can also easily identify an empty section, table, or row, as the icon beside it appears in green. You can assign participants to areas where you see green. The icon beside a partially full section, table, or row appears in yellow. Yellow signifies caution; you are working in an area that may soon become full. The icon beside a completely full section, table, or row appears in red. When you see red, stop assigning participants to seats in that area unless you want to add additional seats.

On the action bar of the **Seats** frame, you can click **New Section**, **New Table**, **New Row**, or **New Seat** to add to your seating arrangements. The button on the action bar changes depending on your selection in the frame. For example, if you select a section, **New Table** or **New Row** (depending on how you divided your seating arrangements) appears on the action bar. If you select a table or row, **New Seat** appears on the action bar. On the action bar, you can click **Delete** to delete a section, table, row, or seat. This button also changes depending on what you select under **Seats** — **Delete Section**, **Delete Table**, **Delete Row**, or **Delete Seat**. Be aware that you can lose participant seating when you delete.

You can click the arrow buttons on the action bar to move an entire section of your seating arrangements up or down within the **Seats** frame. You can move an entire table or row up or down within a section. When you move a section, table, or row up or down within your seating arrangements, the number and name move with the section, table, or row. Once you assign a participant to a seat, you can move that participant up or down within seats in a section, table, or row. Only the participant moves; the number and name of the seat remain the same. The participant moves from seat-to-seat. When you need to renumber your seating, you can make a selection under **Seats** and right-click. From the menu that appears, you can select to **Renumber Sections**, **Renumber Tables**, **Renumber Rows**, **Renumber Seats**, or **Renumber all items**.

Note: To access the Seating Setup Wizard, you can also select **Tools, Seating Setup** from the menu bar of the Seating screen.

When you decide to totally rearrange your seating arrangements, click **Setup** on the action bar to access the Seating Setup Wizard. For information about the Seating Setup Wizard, see “Seating Setup Wizard” on page 40.



Before You Start to Assign Participants to Seats

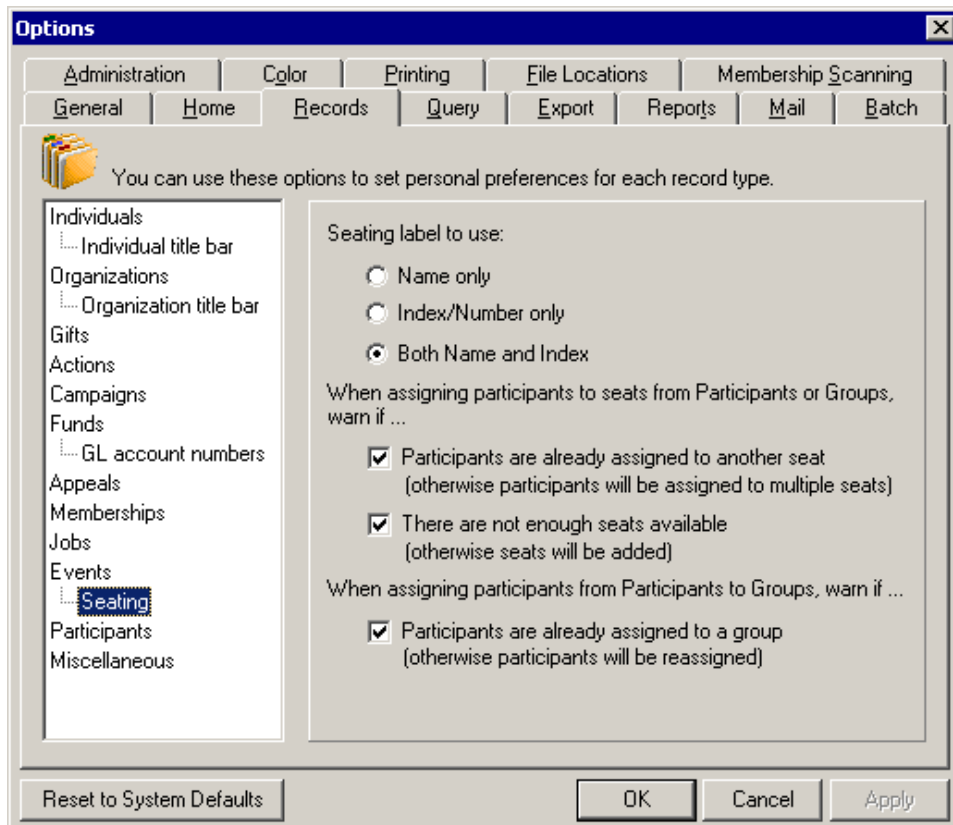
Once you set up seating arrangements for an event and can access the Seating screen, it is time to think about a few procedures before you start to assign participants to seats.

In User Options, on the Records tab, you must set up Seating options. To easily see on the Seating screen if a participant is a registrant, guest, or sponsor, you can use the Legend to set up color and text formatting for different participant types. To track vital statistics about your event seating, you can view event properties at any time. On the Seating screen, you should decide which frames to view and where to place them. Also, when you want to completely change your seating arrangements, you can delete the seating setup and start over.

Event Seating User Options

User options are preferences you set that affect how *The Raiser's Edge* looks and runs on any workstation you use. User options are login-specific, which means these options affect only workstations you enter with your password.

To establish event seating user options, select **Tools, User Options** from the menu bar of the Seating screen. The Options screen appears. Select the Records tab. From the tree view on the left, under **Events**, select **Seating**. Your Event Seating Options appear on the right. Here, you can establish the label that should appear beside your seats. When assigning participants to seats, you can select to have warning messages appear when participants are already assigned to seats and when there are not enough seats to accommodate your participants. When you add participants to a group before seating the group, you can select to have a warning message appear if participants have already been placed in another group. All event user options are discussed in one place in this guide. For information about all event user options, see “User Options” on page 14. For the procedure on setting up seating user options, see “Establish event seating user options” on page 15.



Event Seating Legend

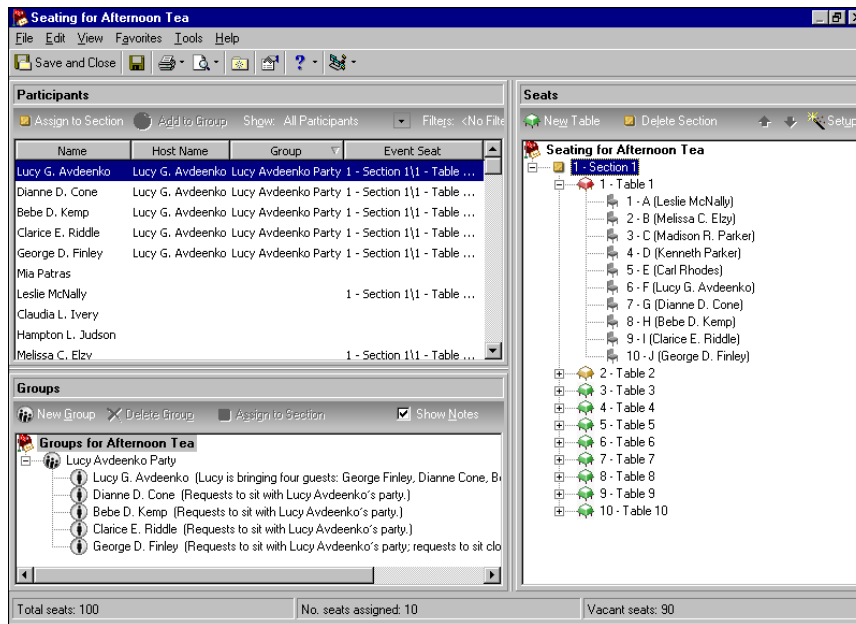
To easily determine the participant type on the Seating screen, you can specify a color or text format to identify each type. For example, you may want your registrants to appear in black, your guests in red, and your sponsors in green. You may decide to display the participants who you have already assigned to seats in bold. For more information about setting legend options in general, see the *Program Basics Guide*.

► Select seating legend options for participant types

1. From an event record for which you have already run the Seating Setup Wizard and set up seating arrangements, select the General tab. For information about how to open an event record, see “Open an event record” on page 10.

Note: You can also select legend options from the General tab of a participant record. You can follow these steps starting with step 2.

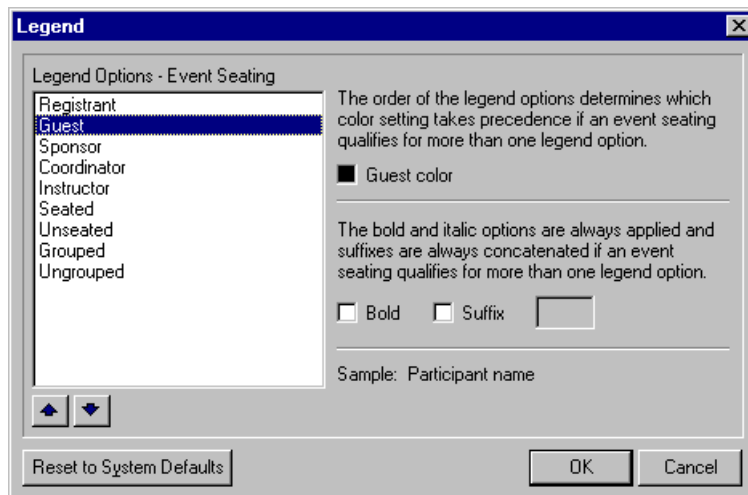
2. Click **Seating**. The Seating screen appears.



From the menu bar, select **View, Legend**.

Note: To change the order of entries in the **Legend Options** box, use the up and down arrows. The order in which the options appear in the box determines which color setting takes precedence if a participant qualifies for more than one. If a participant qualifies for multiple text options, the bold format matches that of the first entry in the **Legend Options** box, and the suffixes are connected in order of importance.

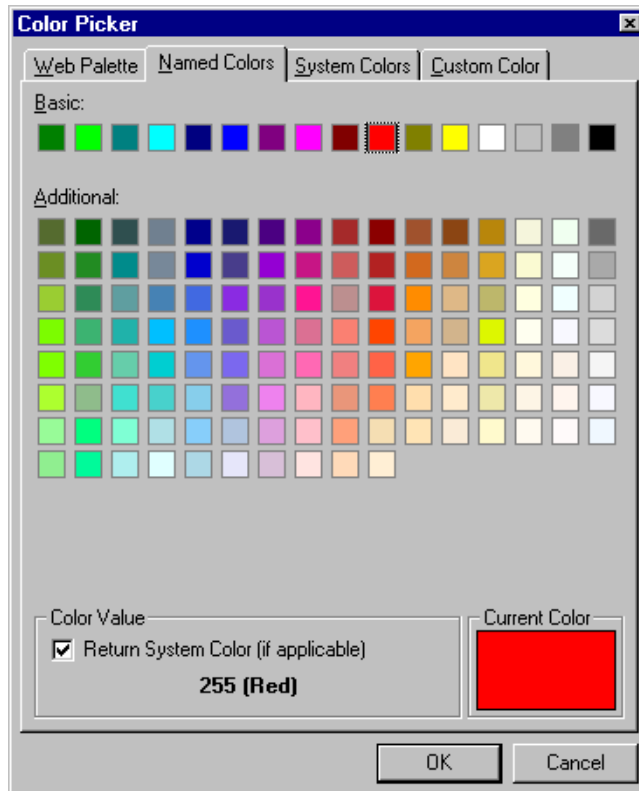
The Legend screen appears.



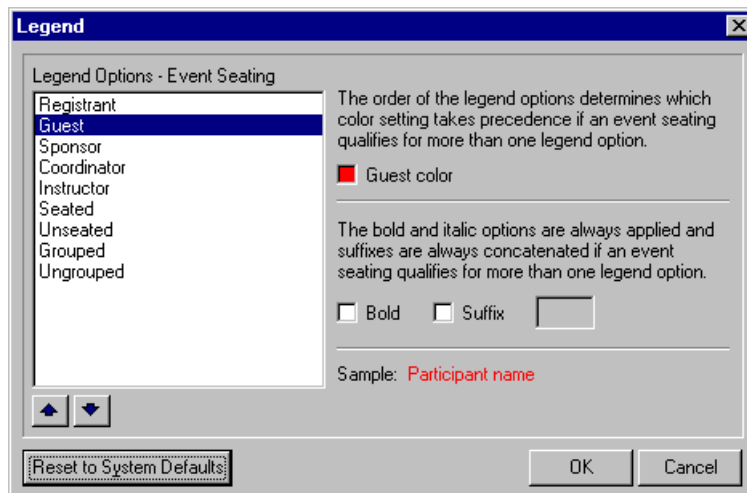
Note: To undo any legend changes and return to the program default settings, click **Reset to System Defaults**.

3. In the **Legend Options - Event Seating** box, select the participant type to format.

- Click the **color** box on the right. The Color Picker screen appears.

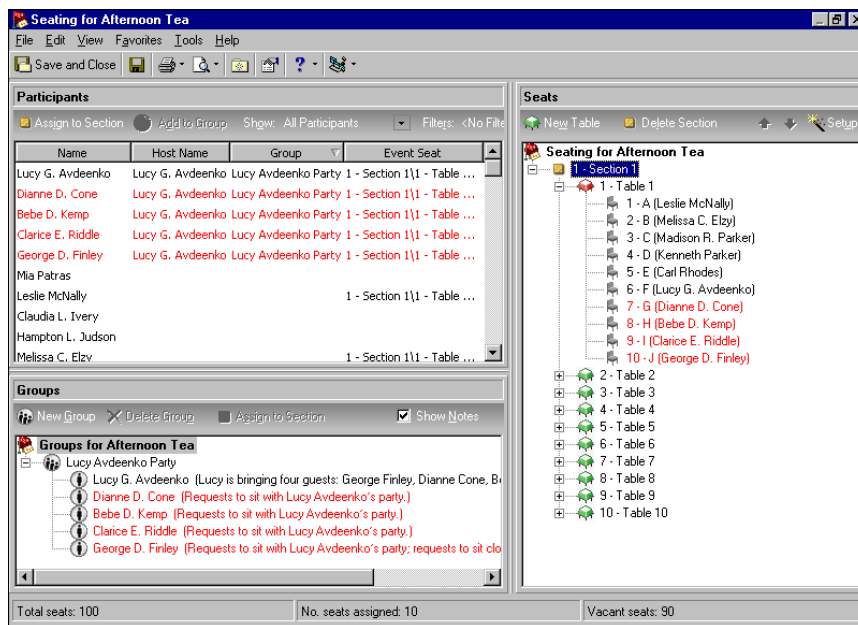


- Select a tab, select a color, and click **OK**. You return to the Legend screen. The color selected on the Color Picker screen appears in the participant **color** box. The **Sample** field displays text in the color selected.



- Select whether to make your text bold or add a suffix for a participant type. To format your text in bold, mark **Bold**. To add a suffix, mark **Suffix** and enter your suffix in the field.

- Click **OK**. You return to the Seating screen. The legend colors and formats selected for your participant type(s) appear on the screen within all frames.



- To save and close the Seating screen, click **Save and Close** on the toolbar. You return to the General tab of the event record.
- On the toolbar, click **Save and Close**.

Seating Properties

Note: You can also view the properties of the event record itself. From the menu bar, select **File, Properties**. Properties tell you the system record ID, the date the record was added, the date the record was last changed, who added it, who last changed it, the event ID, and the import ID.

You can easily view properties for event seating. The Event Seating Properties screen gives you detailed information about seating for a particular event. The properties include the system record ID, event record ID, total seats, total seats available, date the seating was created, by whom the seating was created, and when the seating was last changed.

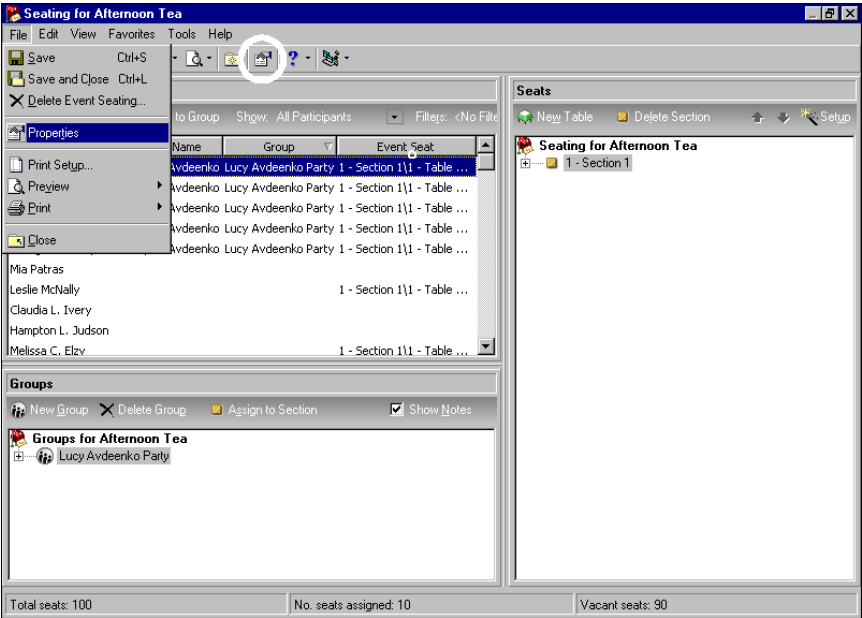
► View seating properties

- From an event record for which you have already run the Seating Setup Wizard and set up seating arrangements, select the General tab. For information about how to open an event record, see “Open an event record” on page 10.

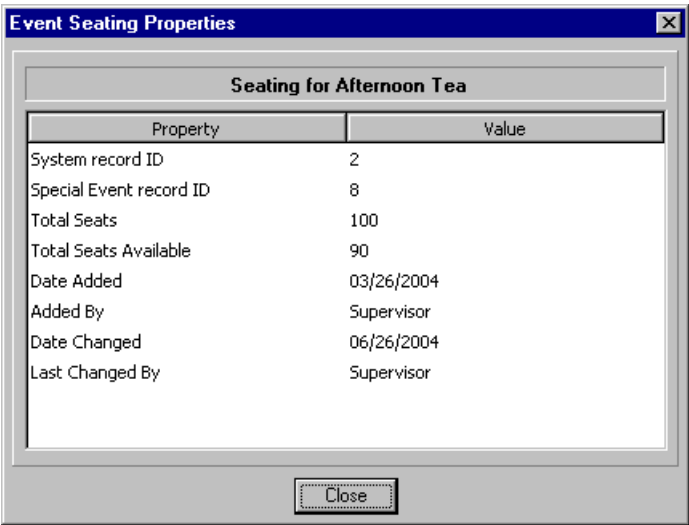
Note: You can also view event seating properties from the General tab of a participant record. You can follow these steps starting with step 2.

- Click **Seating**. The Seating screen appears.

3. From the menu bar of the Seating screen, select **File, Properties**, or click **Properties** on the toolbar.



The Event Seating Properties screen appears.



4. When you finish viewing properties, click **Close**. You return to the Seating screen.
5. On the toolbar, click **Save and Close**. You return to the General tab of the event record.
6. On the toolbar, click **Save and Close**.

Display the Frames on the Seating Screen

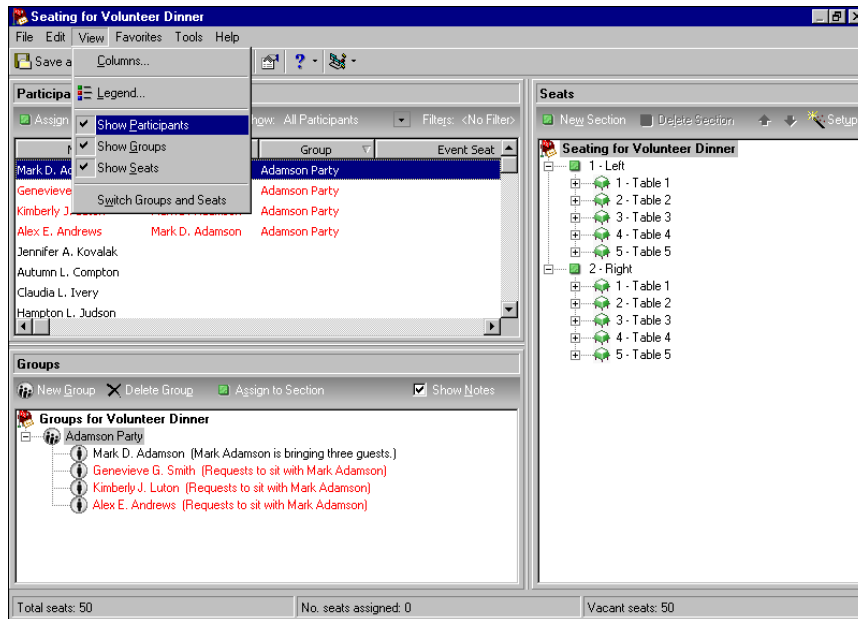
On a Seating screen, you can select the frames — **Participants**, **Groups**, and **Seats** — to view. You may decide to display all, one, or two of them. For example, when you group participants before you seat them, you can hide the **Seats** frame and display just **Participants** and **Groups**. When it is time to assign your participants to seats, you can select to display all three. If you never group participants before you assign them to seats, you may decide to display only **Participants** and **Seats**. You can even switch positions of the **Groups** and **Seats** frames. It is totally up to you to decide which frames to view on the Seating screen. Once you save and close a Seating screen, all Seating screens accessed from all event records display your selections.

► **Select frames on the Seating screen**

1. From an event record for which you have already run the Seating Setup Wizard and set up seating arrangements, select the General tab. For information about how to open an event record, see “Open an event record” on page 10.

Note: You can also select the frames to view on the Seating screen from the General tab of a participant record. You can follow these steps starting with step 2.

2. Click **Seating**. The Seating screen appears.
3. To hide the **Participants** frame, select **View, Show Participants** from the menu bar.

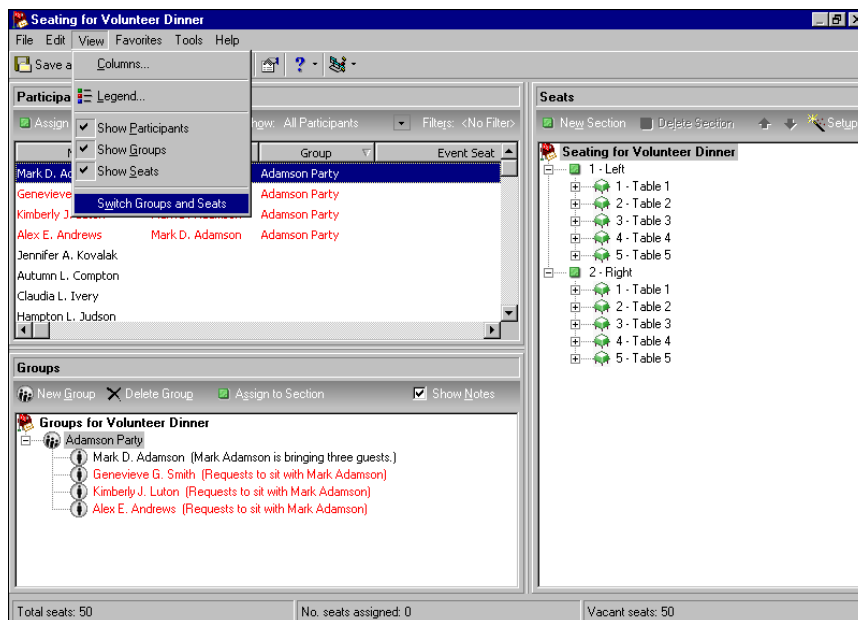


You return to the Seating screen. Only the **Groups** and **Seats** frames appear.

Note: On the **View** menu, a check mark appears beside those frames that are visible on the Seating screen.

4. When you are ready to show the **Participants** frame again, select **View, Show Participants** from the menu bar. A check mark appears beside **Show Participants** on the **View** menu to show it is visible. You return to the Seating screen. The **Participants** frame appears along with the **Groups** and **Seats** frames.
5. You can hide/show the **Groups** and **Seats** frames the same way (**View, Show Groups** and **View, Show Seats**).

6. You may decide to switch the placement of the **Groups** and **Seats** frames. From the menu bar, select **View, Switch Groups and Seats**.



The **Seats** frame now appears on the left and the **Groups** frame appears on the right. You can change them back the same way.

7. When you finish selecting and moving the frames to view, click **Save and Close** on the toolbar. You return to the General tab of the event record.
8. On the toolbar, click **Save and Close**.

Resize the Frames on the Seating Screen

On a Seating screen, you can resize the three frames — **Participants**, **Groups**, and **Seats**. You may want to see more of the **Participants** frame and less of the **Groups** frame. You may decide to make the **Seats** frame wider. Once you save and close a Seating screen, all Seating screens accessed from all event records display your frame sizes.

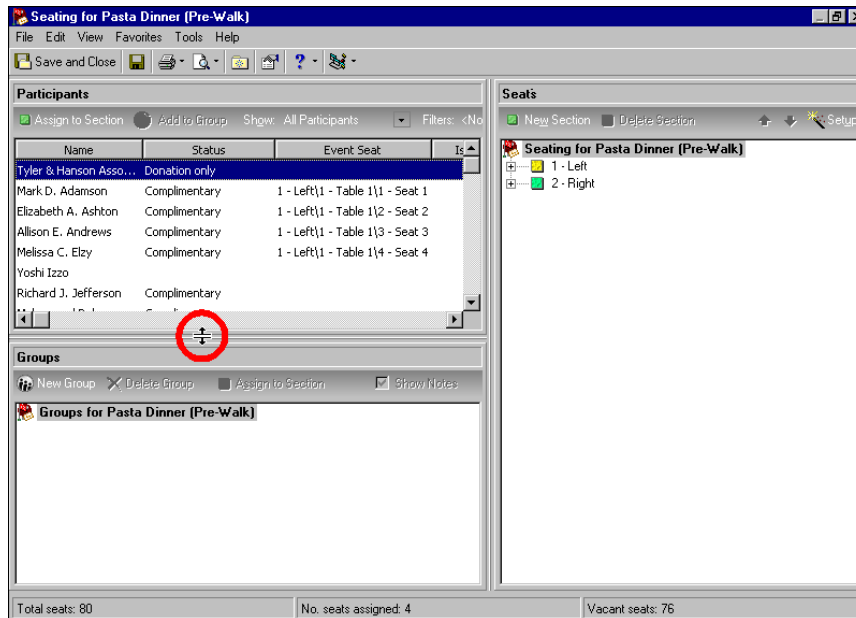
► Resize frames on the Seating screen

1. From an event record for which you have already run the Seating Setup Wizard and set up seating arrangements, select the General tab. For information about how to open an event record, see “Open an event record” on page 10.

Note: You can also resize the frames on the Seating screen from the General tab of a participant record. You can follow these steps starting with step 2.

2. Click **Seating**. The Seating screen appears.

3. On the Seating screen, hover or click between two of the frames. A double arrow cursor appears. For example, to see more of the **Participants** frame and less of the **Groups** frame, click between the **Participants** frame and the **Groups** frame.



4. Drag the frame to resize up or down, left or right. In the previous example, click and drag the **Participants** frame down until it is as large as you want.
5. When you finish resizing the frames, click **Save and Close** on the toolbar. You return to the General tab of the event record.
6. On the toolbar, click **Save and Close**.

Delete Seating Arrangements

Once you set up seating arrangements for an event, you may decide you do not like the way you divided and arranged your seating. Perhaps a venue changes, and you need a completely new setup for a new room. Or, you find out many more participants are attending and you need to seat by rows instead of tables. From the Seating screen, you can completely remove the seating arrangements for an event and start over.

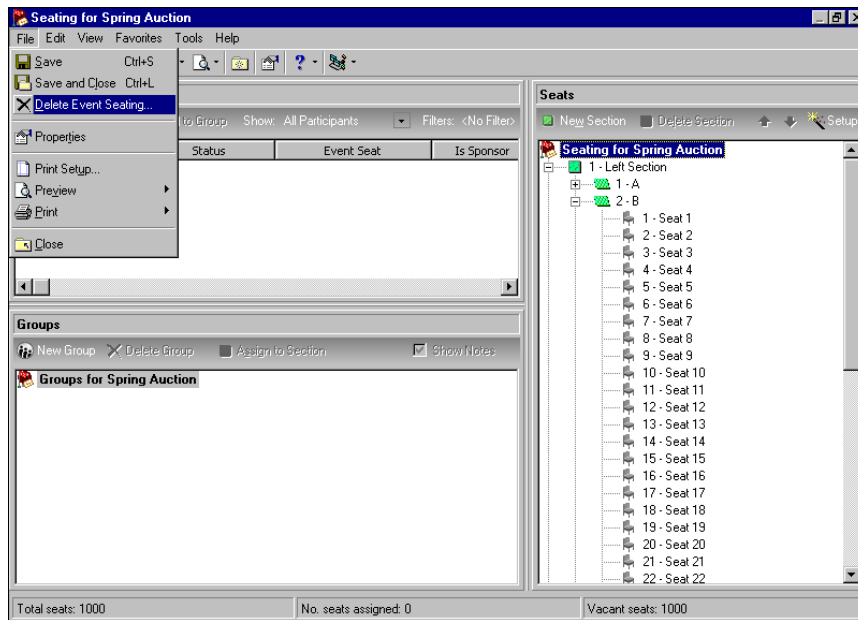
► Delete seating arrangements

1. From an event record for which you have already run the Seating Setup Wizard and set up seating arrangements, select the General tab. For information about how to open an event record, see “Open an event record” on page 10.

Note: You can also delete seating arrangements from the General tab of a participant record. You can follow these steps starting with step 2.

2. Click **Seating**. The Seating screen appears.

- From the menu bar of the Seating screen, select **File, Delete Event Seating**.



Note: If you decide not to delete your seating arrangements, click **No**. You return to the Seating screen. Nothing changes.

A message appears to ask whether to delete all seats.

- Click **Yes**. The program deletes all seating arrangements for the event and removes any participants who have already been assigned to seats from the **Seats** frame on the Seating screen.

You can now click **Setup** on the action bar of the **Seats** frame on the Seating screen to set up your seating arrangements again. For information about the Seating Setup Wizard, see “Seating Setup Wizard” on page 40. Once you set up your new seating arrangements, you must reassign any participants you previously assigned to seats in the old seating arrangements.

- To save and close the Seating screen, click **Save and Close** on the toolbar. You return to the General tab of the event record.
- On the toolbar, click **Save and Close**.

Manually Assign Participants to Seats, Individually and By Groups

Once you set up seating arrangements, seating user options, and participant legend colors and formatting, you can assign participants to their seats. You can assign participants to seats individually, and you can group participants who request to sit together and assign the group to seats. Once you assign participants to seats, if you do not like where you seated them, you can remove each participant separately from seats. You can also clear all seating assignments in a section, table, or row, and start over.

In this section, we discuss how to assign participants to seats from the Seating screen, accessed from the General tab of the event record. You can also access the Seating screen and assign participants to seats from the General tab of the participant record. You can apply what we discuss here to the General tab of the participant record. For information about seating on the participant record, see “Set Up Seating on the Participant Record” on page 151.

Assign Individual Participants to Seats

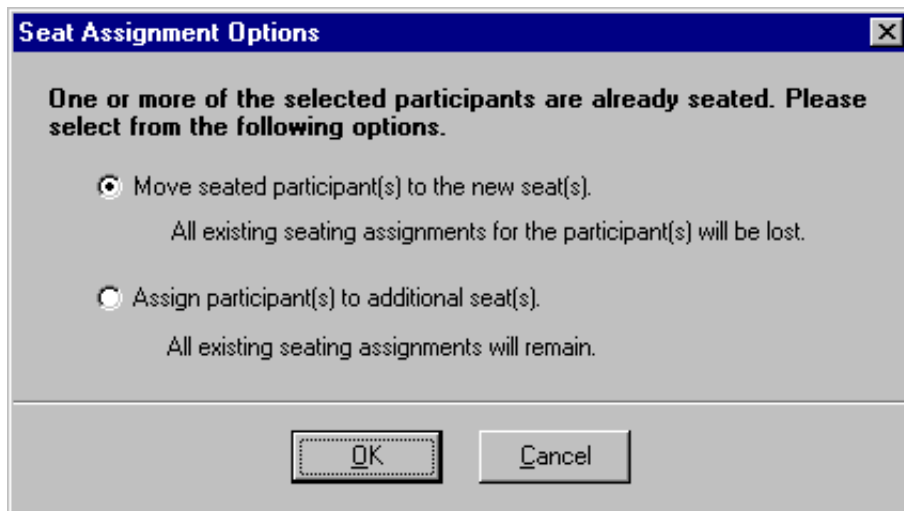
From the **Participants** frame of the Seating screen, you can quickly and easily assign each participant to a seat at a table or row within a particular section. You can assign each participant to a seat one-at-a-time, or you can select multiple participants and assign them simultaneously to seats.

Warning: These warning messages appear only when you set up seating user options. For information about seating user options, see “Establish event seating user options” on page 15.

When you assign one or more participants to a section, table, or row, if there are not enough seats to accommodate a participant, a warning message appears. The program tells you immediately that enough seats are not available and asks whether to add seats. When you click **Yes**, the program adds a seat to accommodate each participant. When you click **No**, no one is assigned to a seat so you can think again about how and where to seat your participants.

Warning: You may decide to seat a participant in multiple seats when the participant brings a guest to an event and you do not know the guest’s name. Instead, we suggest that on the Participants tab of the event record, you click **New Guest** and add a guest record for this individual. In the **Name** field on the guest screen, enter “Guest of [host name]”; for example “Guest of Ryan Presley”. This way, you can assign the guest to his own seat to ensure accurate seating totals and reports. For information about how to add registrants, guests, and sponsors, see “Add Participants” on page 123.

If you try to assign one or more participants to a section, table, or row when they are already seated, the program warns you and gives you some options. You can select to move the participant(s) to the next available seat within the section, table, or row and leave the original seat empty. Or, you can select to leave the participant(s) in their original seat and assign a new seat, which places the participant(s) in multiple seats. When necessary, you can also cancel and start over.



After you assign a participant to a seat, if you need to place the participant elsewhere, you can remove the participant from the seat and assign him to another seat.

► **Assign a participant to a seat**

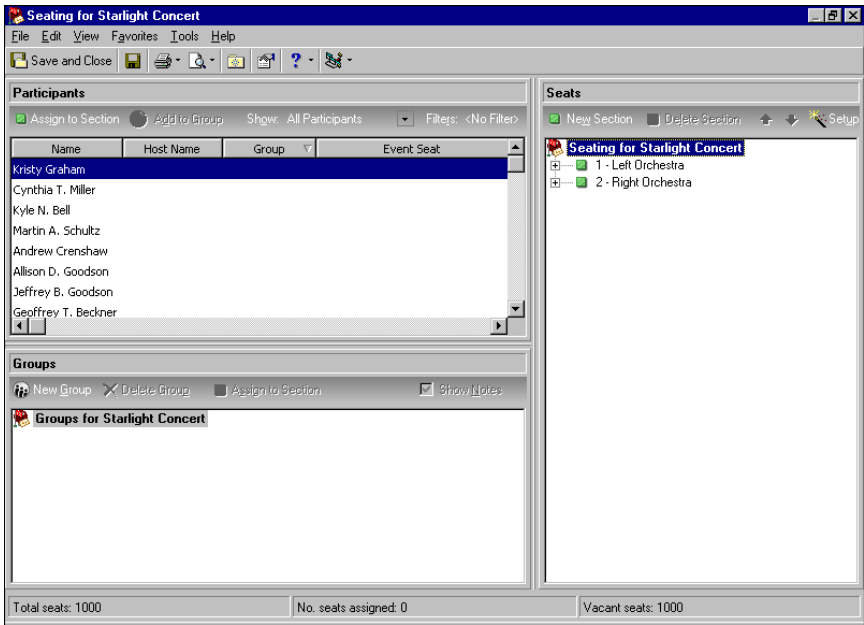
From the **Participants** frame of the Seating screen, you can quickly and easily assign each participant to a seat at a table or row within a particular section.

Scenario: You hold a Starlight Concert fundraiser. You already ran the Seating Setup Wizard, divided your seating, and set up your seating arrangements. You added your participants to the event from the Participants tab of the event record. Now, on the seating screen, from the **Participants** frame, assign each participant to a seat. For information about how to set up seating, see “Seating Setup Wizard” on page 40. If you have not set up seating arrangements for the Starlight Concert, see “Set up seating arrangements” on page 45. For information about how to add participants, see “Add Participants” on page 123.

1. From the Starlight Concert event record, select the General tab. For information about how to open an event record, see “Open an event record” on page 10.

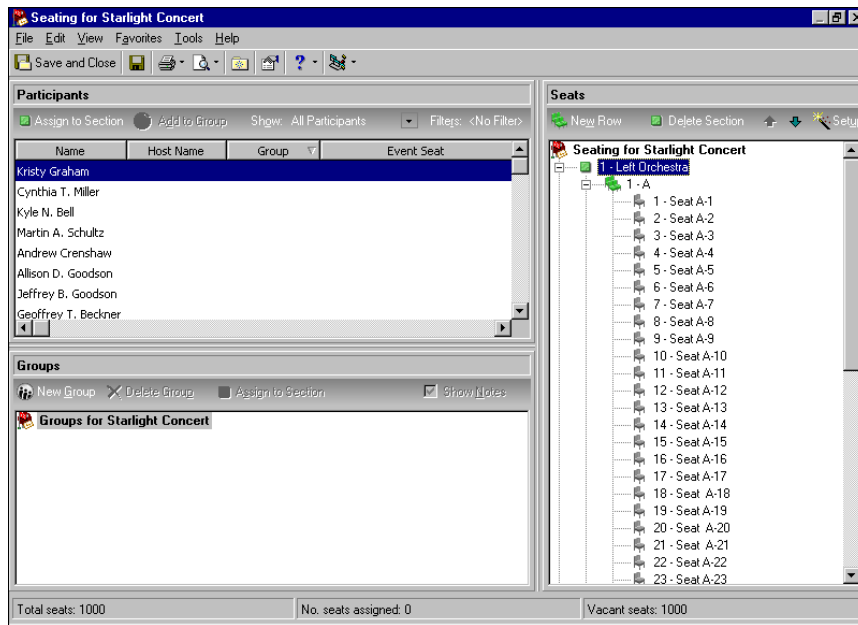
Note: You can also assign a participant to a seat from the General tab of a participant record. You can follow these steps starting with step 2.

2. Click **Seating**. The Seating screen appears.



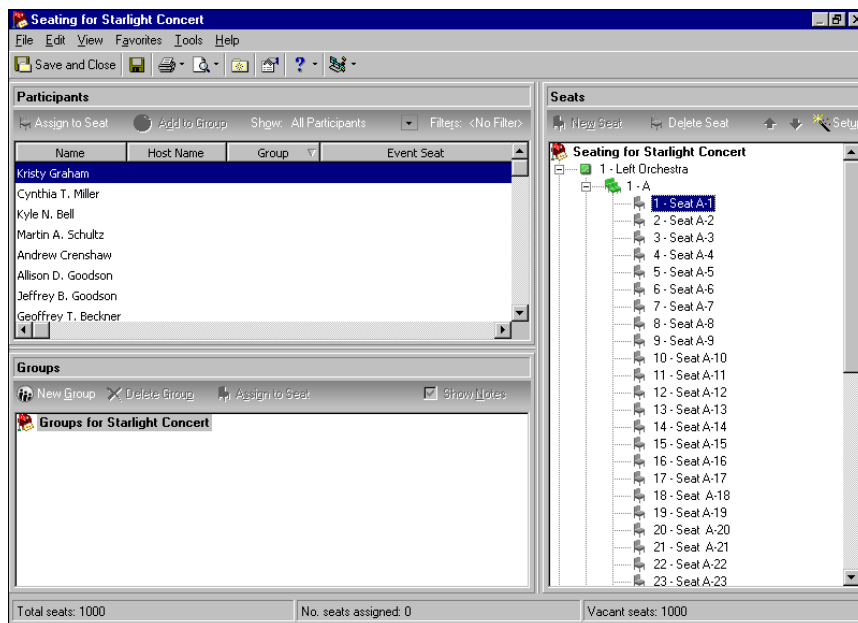
3. You decide to start to assign participants to seats in the first section. Under **Seats**, click the plus sign beside the first section, Left Orchestra. The rows within this section appear, rows A - T (1 - 20).

4. You decide to start to assign participants to seats on the first row of the Left Orchestra. Click the plus sign beside row A. The seats on this row appear, Seat A-1 - Seat A-25 (1 - 25).



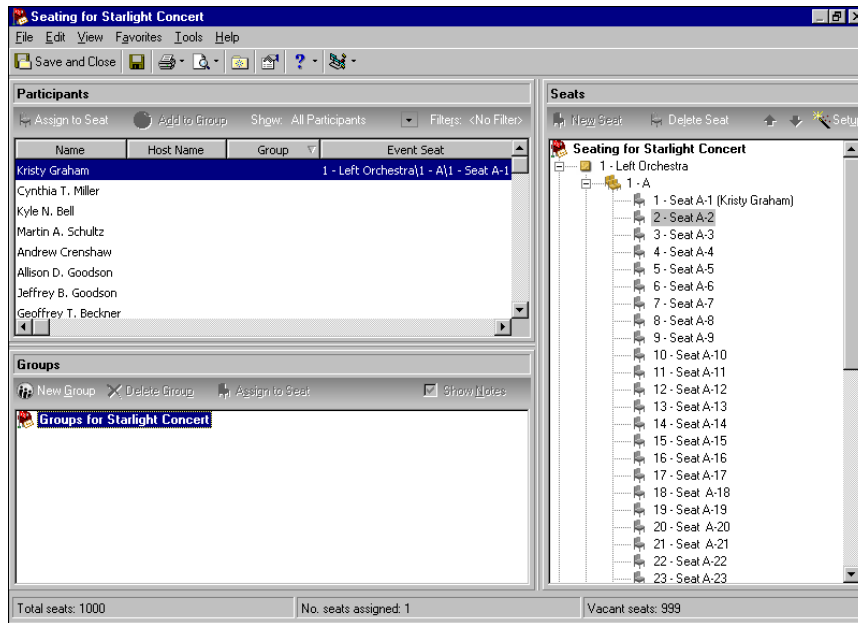
Tip: To quickly assign a participant to a seat, click a participant name under **Participants** and drag him to an empty seat in the **Seats** frame.

5. Under row A, select the first seat, "Seat A-1".



Note: When you assign a participant, if you select a section under **Seats** instead of a particular seat, the button on the action bar of the **Participants** frame changes to **Assign to Section** and the participant is assigned to the first available seat in the first available table or row of that section. If you select a table or row under **Seats**, the button on the action bar of the **Participants** frame changes to **Assign to Table** or **Assign to Row** and the participant is assigned to the first available seat at that table or row.

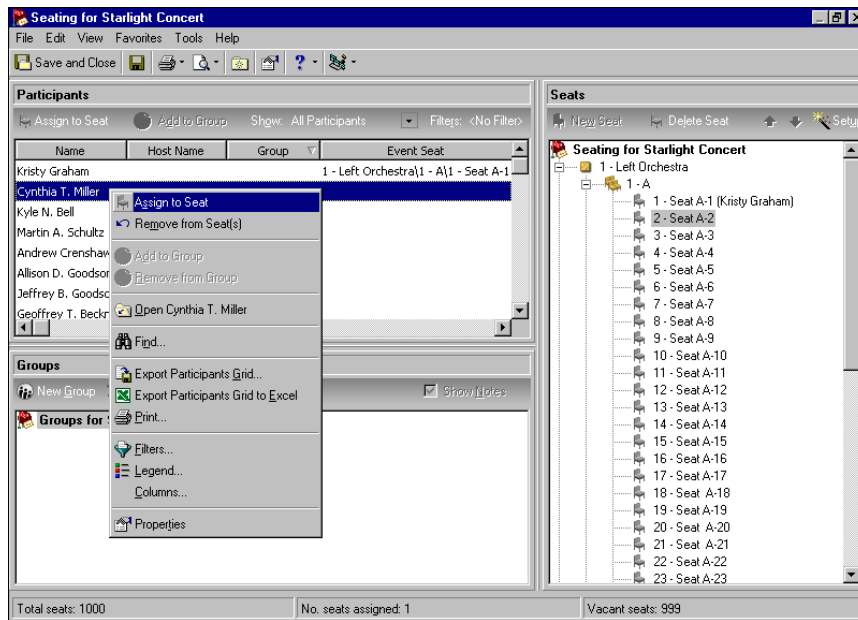
6. Under **Participants**, select the first participant in the list, “Kristy Graham”. You want to assign this participant to Seat A-1.
7. On the action bar of the **Participants** frame, click **Assign to Seat**. Kristy’s name appears in parentheses beside Seat A-1 under **Seats**. Under **Participants**, in the **Event Seat** column, the numbers of the section, row, and seat appear beside Kristy’s name.



8. Under row A, select “Seat A-2”.
9. Under **Participants**, select the second participant in the list, “Cynthia Miller”. You want to assign this participant to Seat A-2.

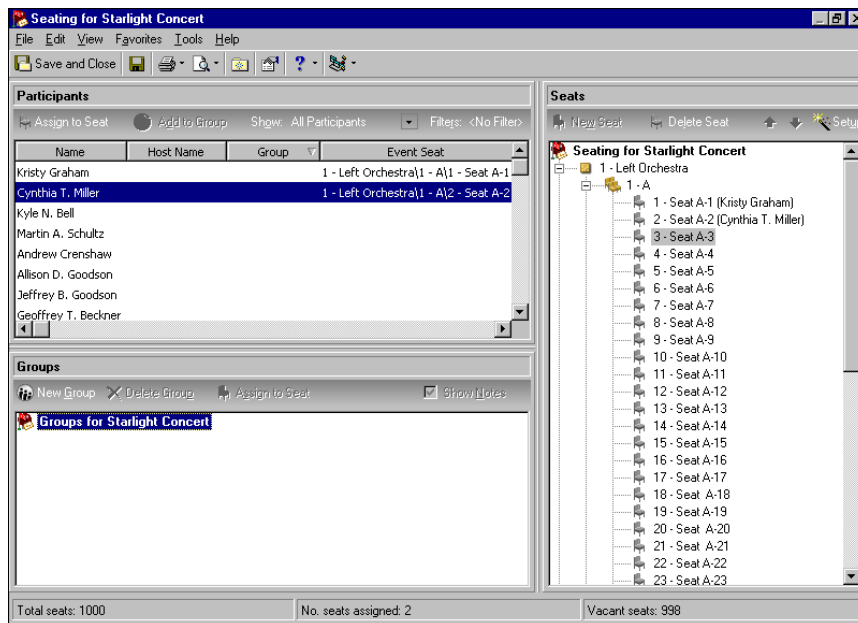
Tip: Under **Participants**, you can select to view the columns that are most helpful for you when seating participants. Right-click in the frame. From the menu that appears, select **Columns**. The Columns screen appears. Move the columns to view from the **Columns** box to the **Display these columns** box. Your selected columns appear under **Participants**.

10. With the participant name selected, right-click. A menu appears.



Tip: Under **Participants**, you can open a participant record to view or edit. Select a participant name and right-click. From the menu that appears, select **Open [participant name]**. The participant record appears. After you view or edit the participant record, click **Save and Close** on the toolbar. You return to the Seating screen.

11. Select **Assign to Seat**. Cynthia's name appears in parentheses beside Seat A-2 under **Seats**. Under **Participants**, in the **Event Seat** column of the grid, the numbers of the section, row, and seat appear beside Cynthia's name.



12. Seat your participants.
13. After you seat your participants, click **Save and Close** on the toolbar. You return to the General tab of the event record.
14. On the toolbar, click **Save and Close**.

► Assign multiple participants to their seats

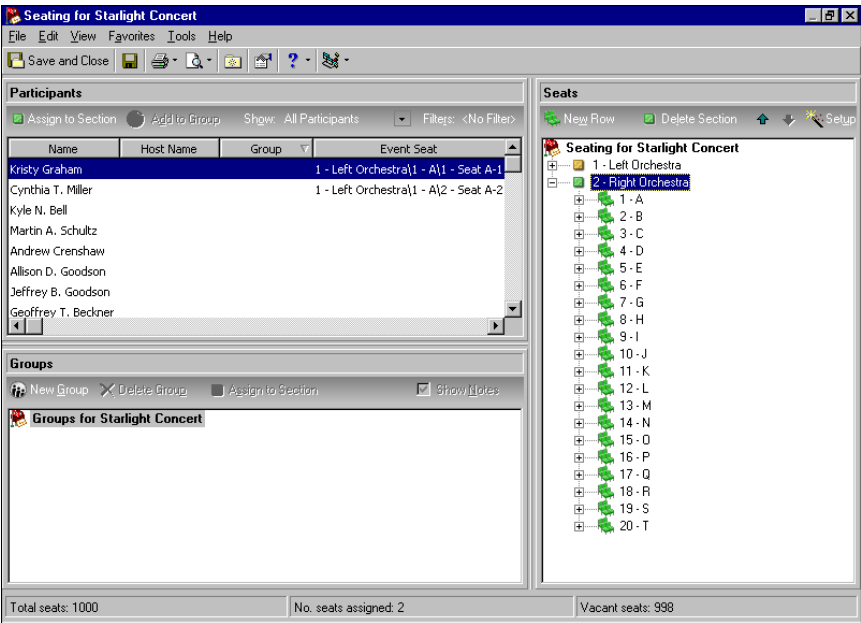
From the **Participants** frame, you can easily assign multiple participants at once to seats in a section, table, or row. This procedure shows how to drag and drop multiple participants from the **Participants** frame to the **Seats** frame. You can also select multiple participants in the **Participants** frame and click **Assign to** on the action bar to assign participants to the **Seats** frame.

Scenario: You hold a Starlight Concert fundraiser. You already ran the Seating Setup Wizard, divided your seating, and set up your seating arrangements. You added your participants to the event from the **Participants** tab of the event record. Now, on the Seating screen, from the **Participants** frame, assign participants to their seats. To assign seats quickly, assign several participants at once. For information about how to set up seating, see “Seating Setup Wizard” on page 40. If you have not set up seating arrangements for the Starlight Concert, see “Set up seating arrangements” on page 45. For information about how to add participants, see “Add Participants” on page 123.

1. From the Starlight Concert event record, select the General tab. For information about how to open an event record, see “Open an event record” on page 10.

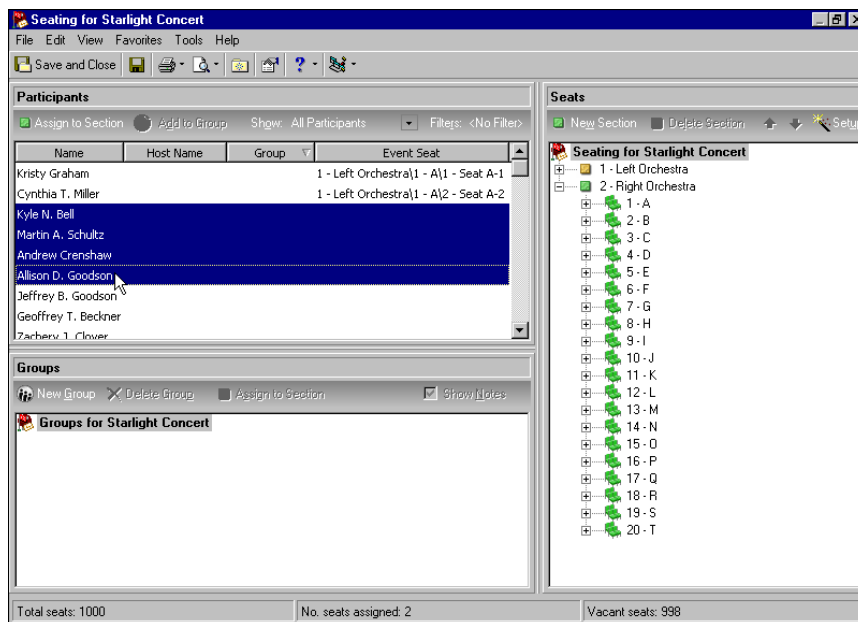
Note: You can also assign multiple participants to seats from the General tab of a participant record. You can follow these steps starting with step 2.

2. Click **Seating**. The Seating screen appears.
3. You decide to start assigning participants to seats in the second section. Under **Seats**, click the plus sign beside the second section, Right Orchestra. The rows within that section appear, rows A - T (1 - 20).



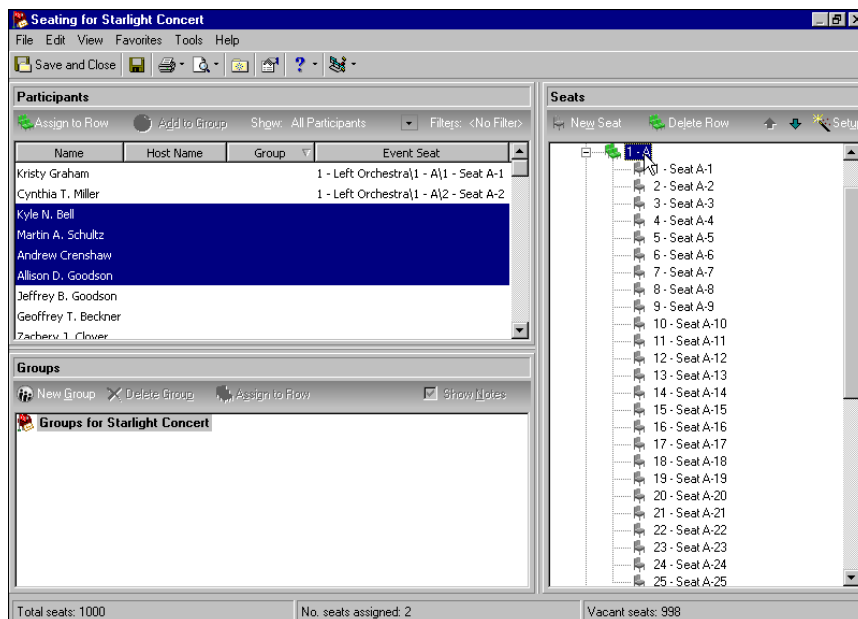
Note: To seat several random participants in the **Participants** frame, press and hold down **CTRL** on your keyboard, and select any unseated participants. You can drag and drop these participants to the **Seats** frame the same way.

- On your keyboard, press and hold down **SHIFT**. Under **Participants**, select four consecutive participants who have not been seated.



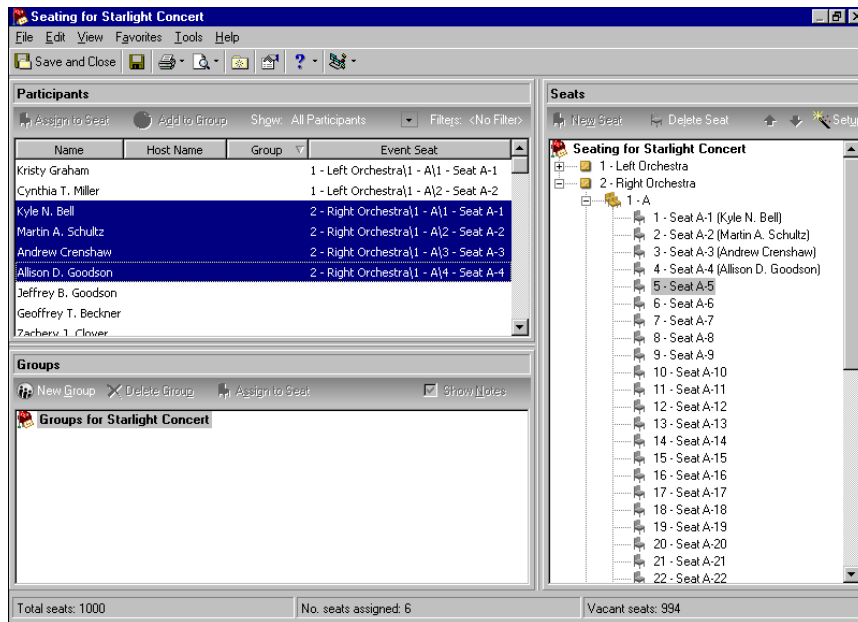
Note: Under **Seats**, an empty section, table, or row has a green icon beside it. A partially full section, table, or row has a yellow icon beside it. A completely full section, table, or row has a red icon.

- Click and drag the participants to the first empty row under Section 2, Right Orchestra, under **Seats**. You can tell which rows are empty because the icon beside the row is green.



Note: When you drag and drop participants to a section instead of a table or row, the participants are seated in the first empty seats of the first available table or row.

Once you release your mouse, the four participants appear in the first empty seats of this row. Under **Participants**, in the **Event Seat** column of the grid, the numbers of the section, row, and seat appear beside the participants' names.



6. Seat your participants.
7. After you seat your participants, click **Save and Close** on the toolbar. You return to the General tab of the event record.
8. On the toolbar, click **Save and Close**.

► **Remove a participant from a seat and reassign to another seat**

After you assign a participant to a seat, if you realize you need to place the participant somewhere else, you can remove the participant from the seat and reassign him to another seat.

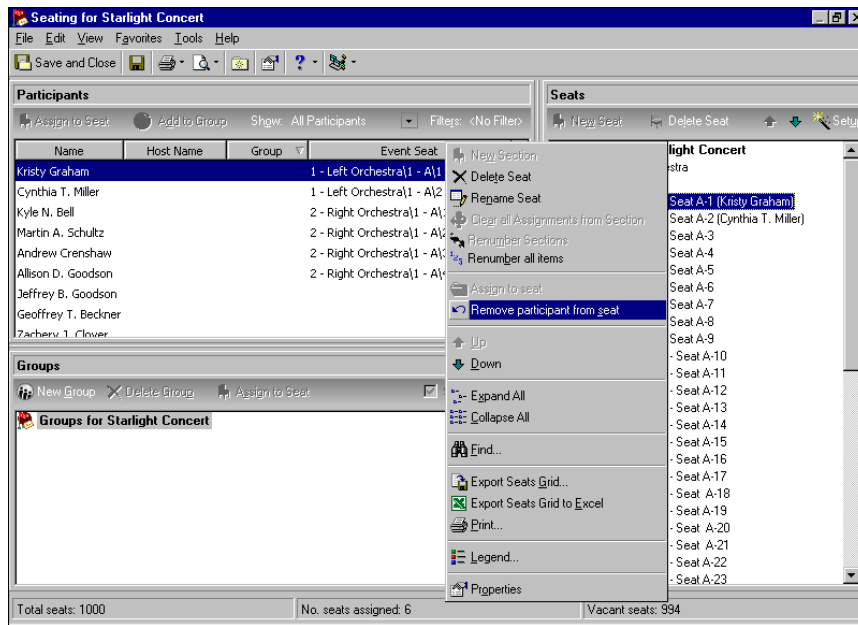
Scenario: You hold a Starlight Concert fundraiser. You set up your seating and are now assigning participants to seats. You recently assigned Kristy Graham and Cynthia Miller to Seat A-1 and Seat A-2 of row A in the Left Orchestra section. You now need to move Kristy to Seat A-3 of the same row and Cynthia to Seat A-4. On the Seating screen, under **Seats**, remove Kristy from Seat A-1 and Cynthia from Seat A-2. Assign them to their new seats. If you have not set up seating arrangements for the Starlight Concert, see “Set up seating arrangements” on page 45. If you have not assigned Kristy and Cynthia to seats, see “Assign a participant to a seat” on page 76. For information about how to add participants, see “Add Participants” on page 123.

1. From the Starlight Concert event record, select the General tab. For information about how to open an event record, see “Open an event record” on page 10.

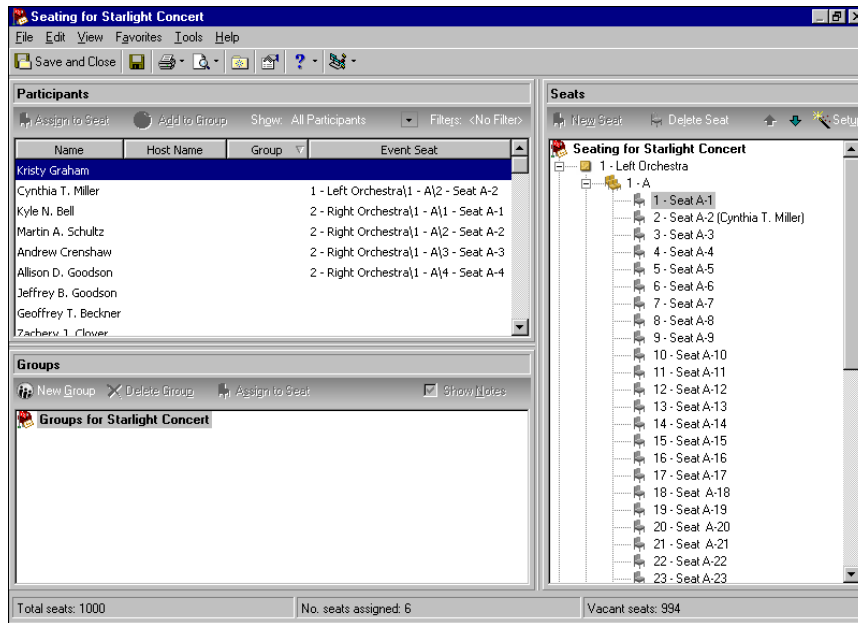
Note: You can also remove a participant from a seat and reassign him to another seat from the General tab of a participant record. You can follow these steps starting with step 2.

2. Click **Seating**. The Seating screen appears.

- Under **Seats**, under row A in the Left Orchestra section, select “Seat A-1 (Kristy Graham)” and right-click. A menu appears.

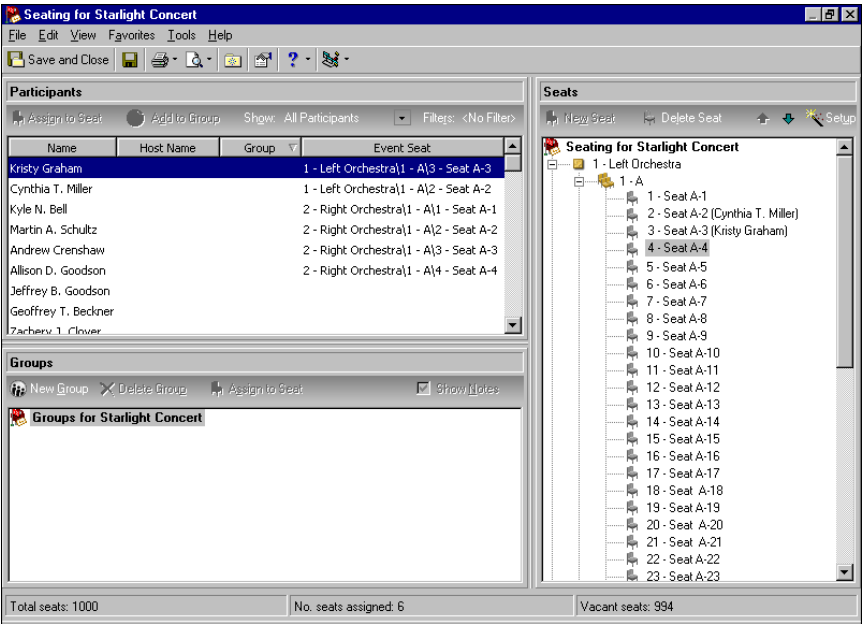


- Select **Remove participant from seat**. Kristy’s name disappears from beside Seat A-1 under **Seats**. Under **Participants**, in the **Event Seat** column of the grid, the numbers of the section, row, and seat disappear beside Kristy’s name.

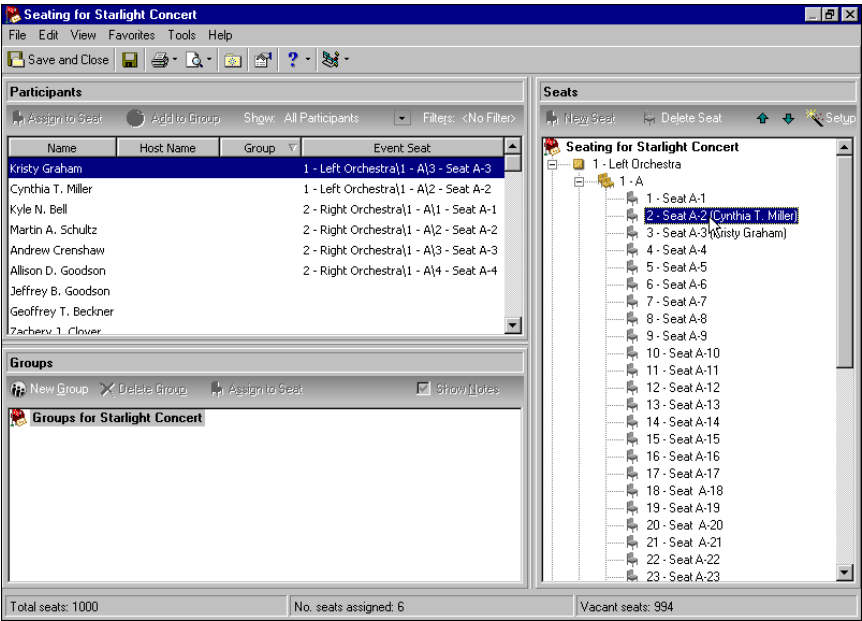


- To assign her to Seat A-3, under **Seats**, under row A of the Left Orchestra, select “Seat A-3”.
- Under **Participants**, select Kristy’s name.

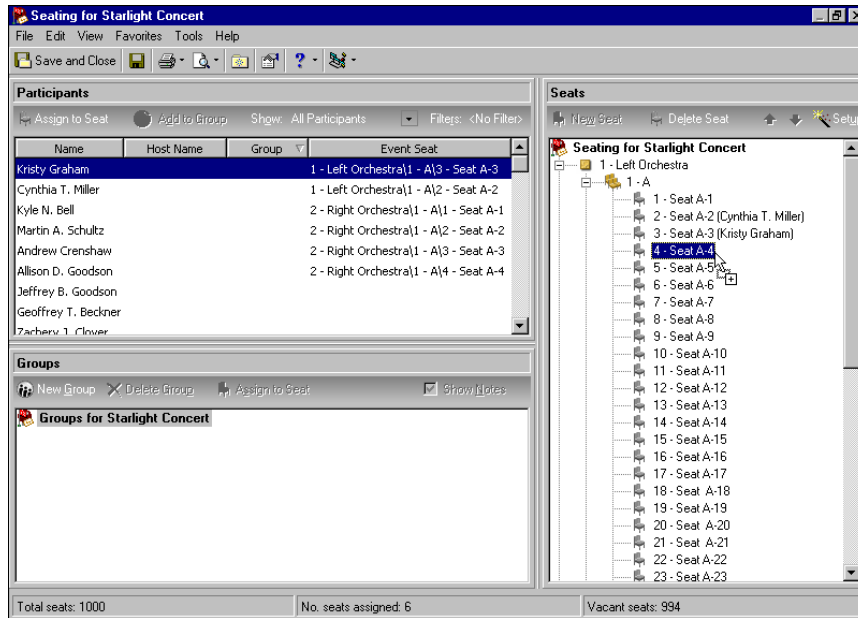
7. On the action bar of the **Participants** frame, click **Assign to Seat**. Kristy's name appears in parentheses beside Seat A-3 in the **Seats** frame. Under **Participants**, in the **Event Seat** column of the grid, the new numbers of the section, row, and seat appear beside Kristy's name.



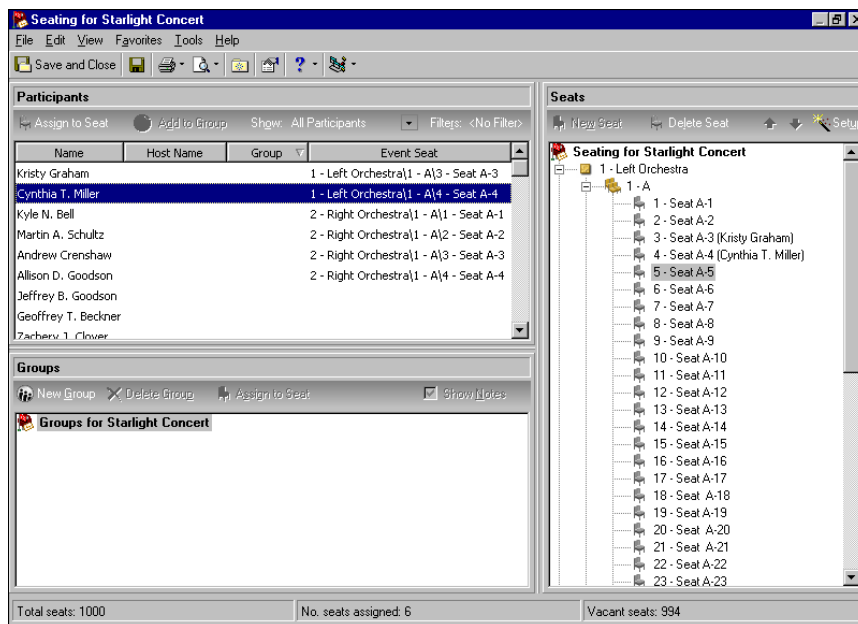
8. You can change the seat assignment of Cynthia Miller from Seat A-2 to Seat A-4. Under **Seats**, select "Seat A-2 (Cynthia Miller)".



- Click and drag Cynthia from Seat A-2 to Seat A-4.



When you release the mouse, Cynthia's name appears in parentheses beside Seat A-4 under **Seats**. Under **Participants**, in the **Event Seat** column of the grid, the new numbers of the section, row, and seat appear beside Cynthia's name.



- Continue to seat your participants.
- After you seat your participants, click **Save and Close** on the toolbar. You return to the General tab of the event record.
- On the toolbar, click **Save and Close**.

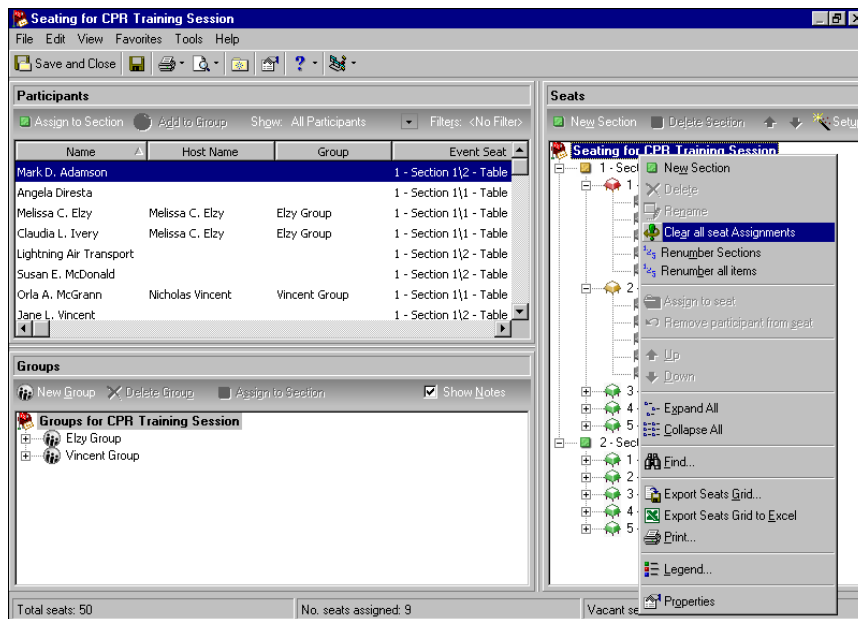
► Clear seating assignments

After you assign any or all participants from the **Participants** frame to the **Seats** frame, if you do not like the way you assigned your participants, you can clear your seating assignments and start over. You can also clear seating assignments when you have assigned groups from the **Groups** frame to the **Seats** frame. For information about how to assign groups to seats, see “Add Participants to Groups and Assign Groups to Seats” on page 86.

1. From an event record for which you ran the Seating Setup Wizard, set up your seating arrangements, added participants to the event from the Participants tab, and assigned participants to seats, select the General tab. For information about how to open an event record, see “Open an event record” on page 10.
2. Click **Seating**. The Seating screen appears.

Tip: You can also clear seating assignments from a particular section, table, or row. When you select a section and right-click, select **Clear all Assignments from Section** from the menu that appears. When you select a table or row and right-click, select **Clear all Assignments from Table** or **Clear all Assignments from Row**. To remove a participant from a seat, you must select **Remove participant from seat**. For information about how to remove a participant from a seat, see “Remove a participant from a seat and reassign to another seat” on page 82.

3. Under **Seats**, to clear all seating assignments, select **Seating for [event name]** and right-click. A menu appears.



4. Select **Clear all seat Assignments**. A message appears to inform you that all existing seating assignments will be lost and ask whether to continue.
5. Click **Yes**. All seating assignments disappear from your seating arrangement under **Seats**. You can now start to assign participants to seats.
6. After you seat your participants, click **Save and Close** on the toolbar. You return to the General tab of the event record.
7. On the toolbar, click **Save and Close**.

Add Participants to Groups and Assign Groups to Seats

Note: For information about how to add participants to an event record, see “Add Participants” on page 123.

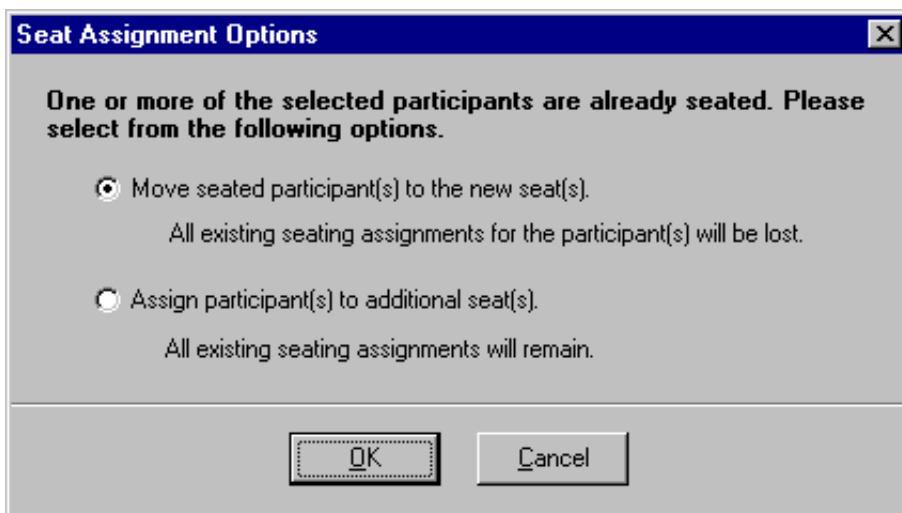
When participants register for an event, they may often request to sit with other participants. To accommodate your participants' wishes, under **Groups** on the Seating screen, you can create named groups. Once you create a group and name it, you must add the associated participants from the **Participants** frame to the appropriate group in the **Groups** frame. Once you create a named group and add participants to the group, you can quickly and easily assign the entire group to seats at the same table or row within a section.

Warning: These warning messages appear only when you set up seating user options. For information about seating user options, see "Establish event seating user options" on page 15.

When you assign a group to a section, table, or row, if there are not enough seats within the selected section, table, or row to accommodate any or all participants within the group, a warning message appears. The program lets you know that enough seats are not available and asks whether to add seats. When you click **Yes**, the program adds seats to accommodate the participants in the group. When you click **No**, the group is not assigned to seats so you can think about how and where to seat the group.

Warning: When you assign a group to seats, a combination of messages can appear. For example, you have a group of five participants. You earlier seated one member of the group individually to a seat at Table 1. You now try to seat the entire group to Table 2, which happens to have only three seats. The "One or more of the selected participants are already seated" message appears. You decide to move the wrongly seated participant to a new seat so he can sit with the group. Mark **Move seated participant(s) to the new seat(s)** and click **OK**. Because the group has five members and the table has only three seats, the "There are not enough seats. Do you want to add seats?" message appears. Click **Yes**. The program adds seats to accommodate the wrongly seated participant and the rest of the group.

If you try to assign a group to seats within a section, table, or row when one or more participants within that group are already seated, the program warns you and gives you some choices. You can select to move the participant(s) to the next available seat(s) along with the group, leaving their original seat empty. Or, you can choose to leave the participant(s) in their original seat(s) and also assign a new seat, placing the participant(s) in multiple seats. When necessary, you can always cancel and start over.



► **Create a group and adding participants to the group**

When participants register for an event, they may often request to sit with other participants. To accommodate your participants' wishes, you can create named groups. Once you create a group and name it, you must add the associated participants to the appropriate group.

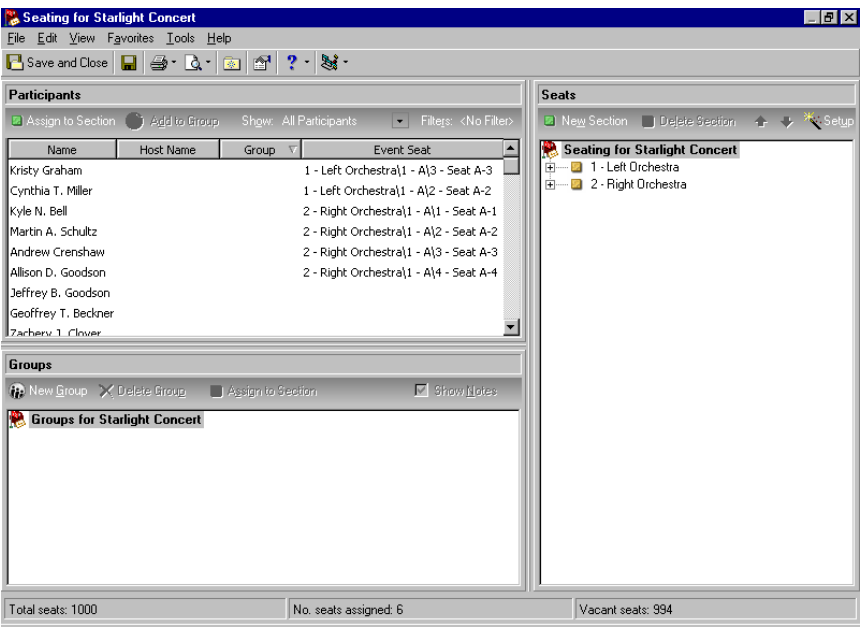
Scenario: You hold a Starlight Concert fundraiser. You set up your seating and are now assigning participants to seats. Clara Daniels plans to attend the concert and bring three guests: Bebe Kemp, Dianne Cone, and Clarice Riddle. She requests you seat her and her guests together. To ensure they sit together, on the Seating screen, create a group for Clara's party and add each of the participants to the group. For information about how to set up seating, see "Seating Setup Wizard" on page 40. If you have not set up seating arrangements for the Starlight Concert, see "Set up seating arrangements" on page 45. For information about how to add participants, see "Add Participants" on page 123.

Note: On the General 2 tab of a participant record, you can also add the participant to a group by selecting or adding a group in the **Seating Group** field. As participants register for an event and request to sit with other participants, you may decide to go ahead and add each participant to a group right from the General 2 tab. This way, when you start to assign your participants and groups to seats, you can ensure you remember to respect their seating wishes. For information about seating on the General 2 tab, see, "Set Up Seating on the Participant Record" on page 151.

1. From the Starlight Concert event record, select the General tab. For information about how to open an event record, see "Open an event record" on page 10.

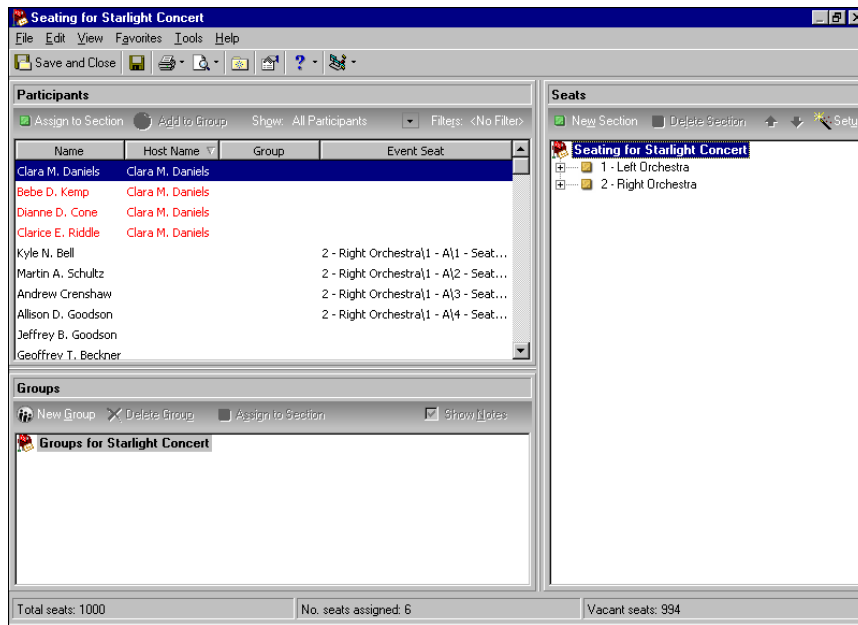
Note: You can also create a group and add participants to the group from the General tab of a participant record. You can follow these steps starting with step 2.

2. Click **Seating**. The Seating screen appears.



Note: Under **Participants**, you can sort the way your participants appear in the grid. Click a column header to sort in ascending or descending order. For example, click the **Name** column to sort participants by last name in ascending or descending order. Click the **Group** column to sort your groups by group name in ascending or descending order. For more information about how to sort within grids in *The Raiser's Edge*, see the *Program Basics Guide*.

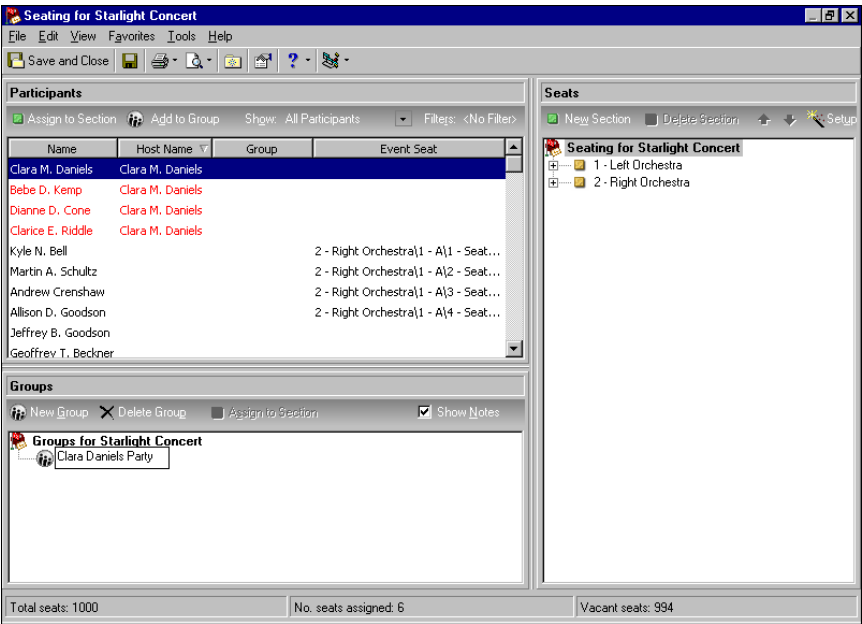
- Under **Participants**, click the column header of the **Host Name** column. You want to sort the column either ascending or descending by host name (up or down arrow), so you can easily find Clara (the host) and each of the guests she is bringing. The host name (Clara Daniels) appears beside her own name in the grid and also by each guest she is bringing to the event. When you sort this way, host and guests appear in the grid under **Participants** together. For information about how to add registrants and guests to an event record, see “Add Participants” on page 123.



- Under **Groups**, on the action bar, click **New Group**. “Group 1” appears under **Groups for Starlight Concert** in the frame.

Note: You can always change the name of a group under **Groups**. Select the group name, right-click, and select **Rename Group**. You can now edit the group name. Delete the name and enter a new one.

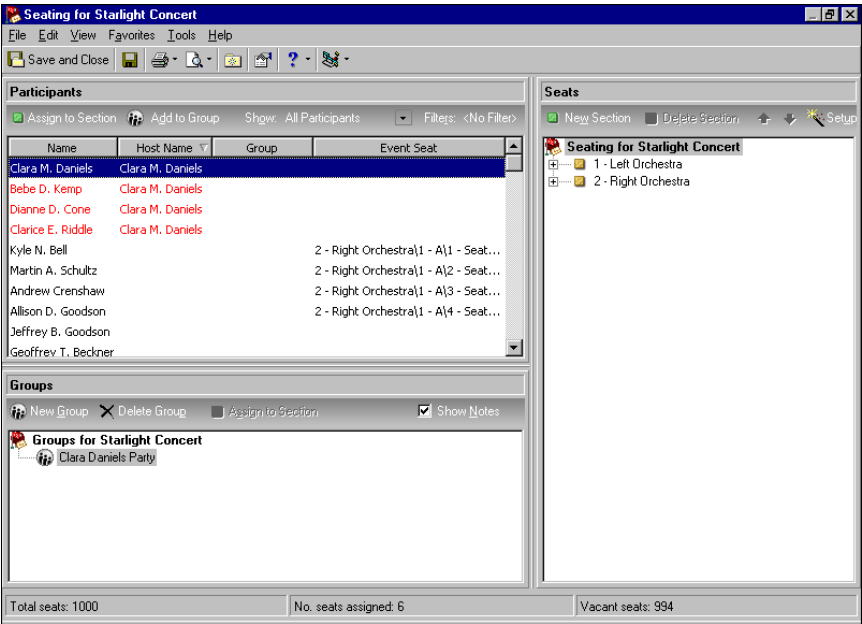
5. Delete the name “Group 1” and enter “Clara Daniels Party”.



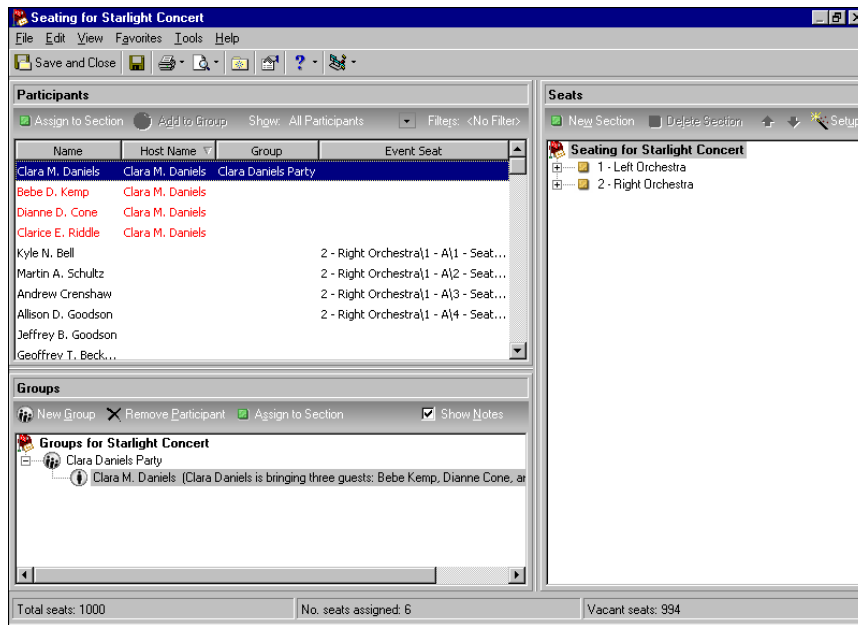
6. Under **Groups**, click the icon beside the group name to select it.

Tip: To quickly add a participant to a group, you can also click a participant name in the **Participants** frame and drag her to a group in the **Groups** frame.

7. Under **Participants**, in the **Name** column, select “Clara Daniels”. Because Clara is the party host, you want to add her first to the group.



8. On the action bar of the **Participants** frame (making sure “Clara Daniels Party” is still selected under **Groups**), click **Add to Group**. Clara now appears under the Clara Daniels Party under **Groups**.

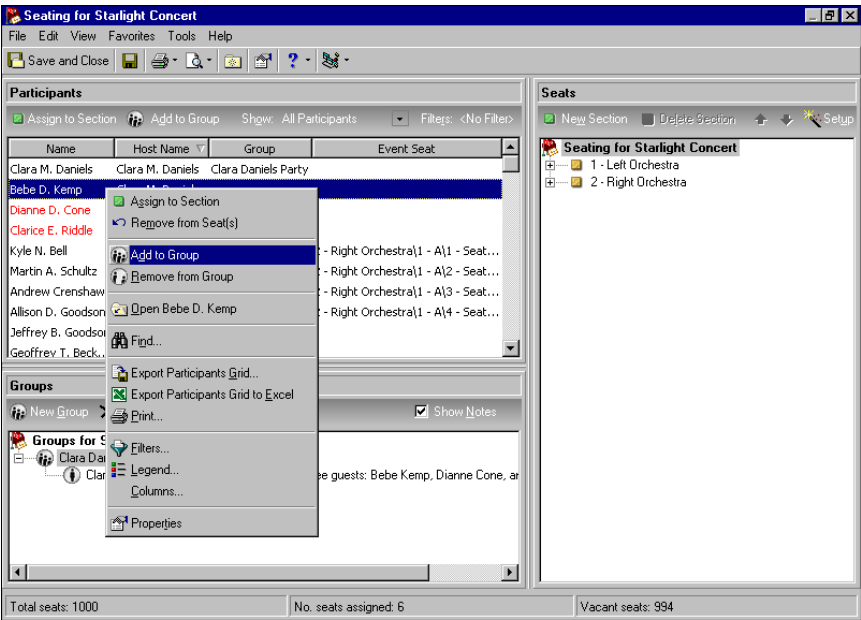


9. Leave **Show Notes** marked on the action bar of the **Groups** frame. The notes you added in the **Group/seating notes** field on the General tab of the participant record appear.

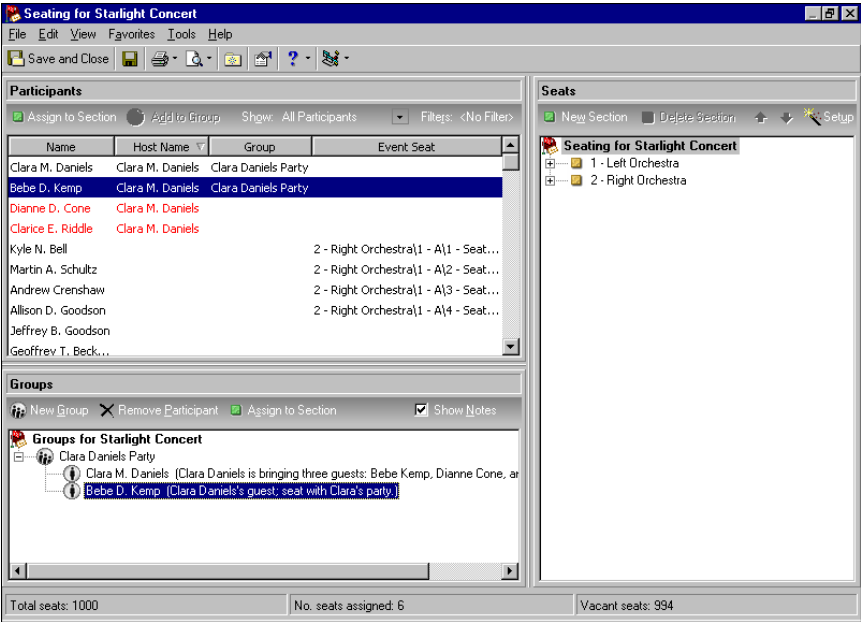
On the General tab of the participant record, in the **Group/seating notes** field, you can enter helpful notes to remember about a participant's group or seating requests. For example, when Clara informed you of her three guests and requested you seat them together, you entered this information in the **Group/seating notes** field on the General tab of her participant record. All notes you entered there appear here beside her name under **Groups**. When you do not want to see these notes, unmark **Show Notes**. For information about how to add group and seating notes to the participant record, see “Add group and seating notes for a participant” on page 154.

10. To add another member of Clara's party to the group, under **Groups**, select “Clara Daniels Party”.
11. Under **Participants**, select “Bebe Kemp”.

12. With the participant name selected, right-click, and select **Add to Group**.

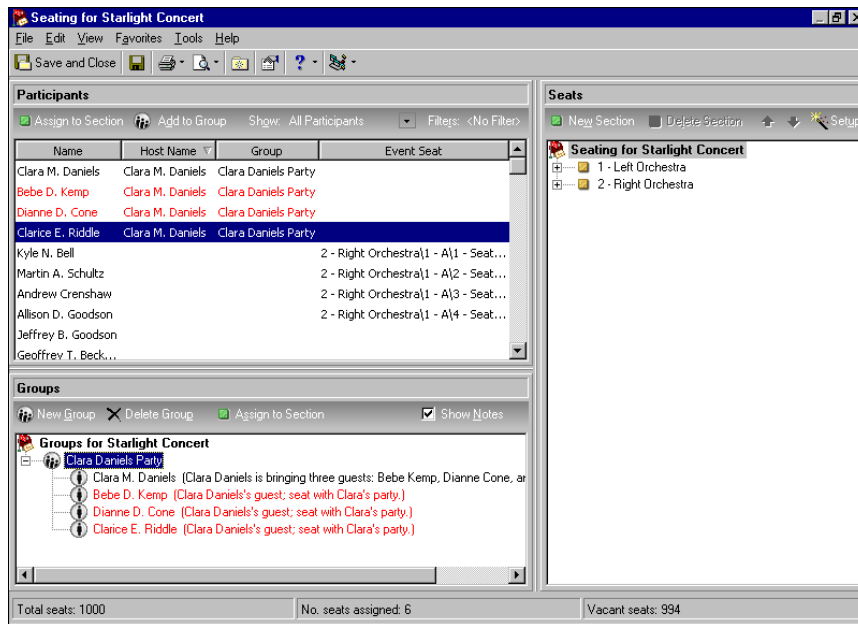


Bebe also appears underneath the Clara Daniels Party under **Groups**. Any group and seating notes added in the **Group/seating notes** field on the General tab of Bebe's participant record appear beside her name.



Note: You can remove a participant from a group at any time. Under **Groups**, select a participant name, right-click, and select **Remove Participant**. The participant disappears from the group. Under **Participants**, the group name disappears from the **Group** column beside the participant's name.

13. Add Dianne Cone and Clarice Riddle, Clara's other two guests, to the group.



14. After you add your participants to the group, click **Save and Close** on the toolbar. You return to the General tab of the event record.
15. On the toolbar, click **Save and Close**.

► Remove a participant from a group

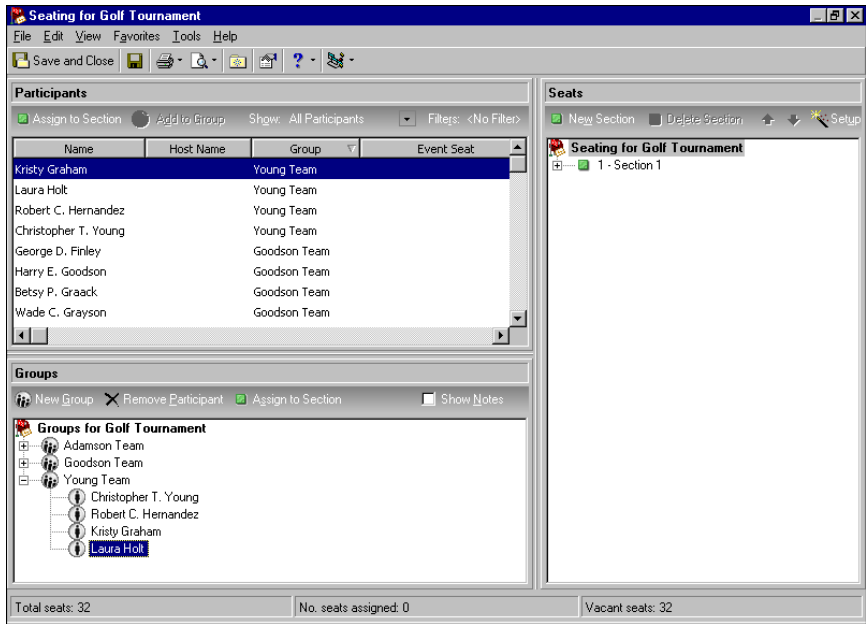
Note: Once you assign a group from the **Groups** frame to seats in the **Seats** frame, if you remove a participant from the group in the **Groups** frame, that participant remains in his assigned seat in the **Seats** frame. To move him to another group with which to be seated, you must first remove him from his seat. Under **Seats**, right-click, and select **Remove participant from seat**. You can now assign him from the **Participants** frame to another group under **Groups**.

Once you add participants from the **Participants** frame to a group in the **Groups** frame, you can remove a participant from the group at any time.

1. From an event record for which you ran the Seating Setup Wizard, set up your seating arrangements, added participants to the event from the Participants tab, set up a group, and added participants to that group, select the General tab. For information about how to open an event record, see "Open an event record" on page 10.

Note: You can also remove a participant from a group from the General tab of a participant record. You can follow these steps starting with step 2.

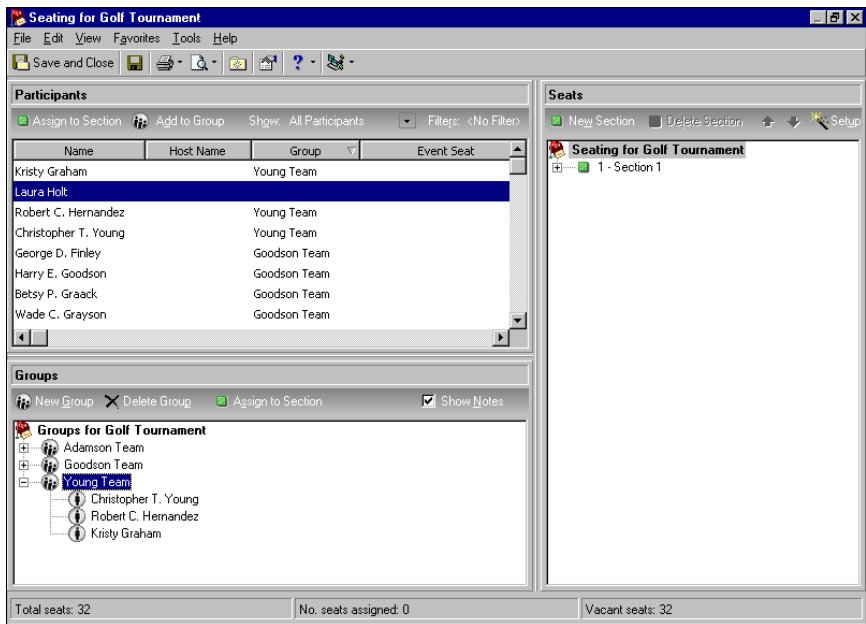
- Under **Groups**, expand the group and select the participant to remove from the group.



Note: To remove a participant from a group under **Groups**, you can also right-click on the participant name and select **Remove Participant**. The participant disappears from the group.

- On the action bar of the **Groups** frame, click **Remove Participant**. The participant disappears from the group. Under **Participants**, the group name disappears from the **Group** column beside her name.

You can now assign the participant from the **Participants** frame to another group in the **Groups** frame. Or, you can assign her individually from the **Participants** frame to the **Seats** frame. For information about how to create a group and add its participants, see “Create a group and adding participants to the group” on page 88. For information about how to assign a participant to a seat, see “Assign a participant to a seat” on page 76.



- On the toolbar, click **Save and Close**. You return to the General tab of the event record.

- On the toolbar, click **Save and Close**.

► **Assign a group to seats**

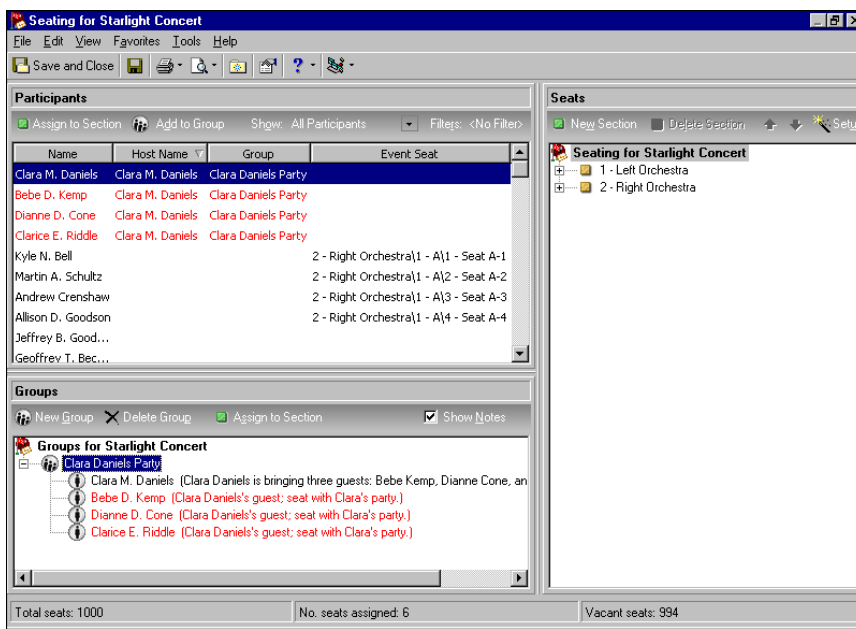
When participants register for an event, they may often request to sit with other participants. To accommodate your participants' wishes, you can create named groups. Once you create a group and name it, you must add the associated participants to the appropriate group. After you create a named group and add participants to the group, you can quickly and easily assign the entire group to seats at the same table, row, or section. This procedure shows you how to assign a group to their seats.

Scenario: You hold a Starlight Concert fundraiser. You set up your seating and are now assigning participants to seats. Clara Daniels plans to attend the concert and bring three guests: Bebe Kemp, Dianne Cone, and Clarice Riddle. She requests that you seat her and her guests together. To ensure they sit together, on the Seating screen, you created a group for Clara's party and added each participant to the group. Now, seat the group together on the same row. For information about how to set up seating, see "Seating Setup Wizard" on page 40. If you have not set up seating arrangements for the Starlight Concert, see "Set up seating arrangements" on page 45. If you have not created a group and added participants to the group, see "Create a group and adding participants to the group" on page 88. For information about how to add participants, see "Add Participants" on page 123.

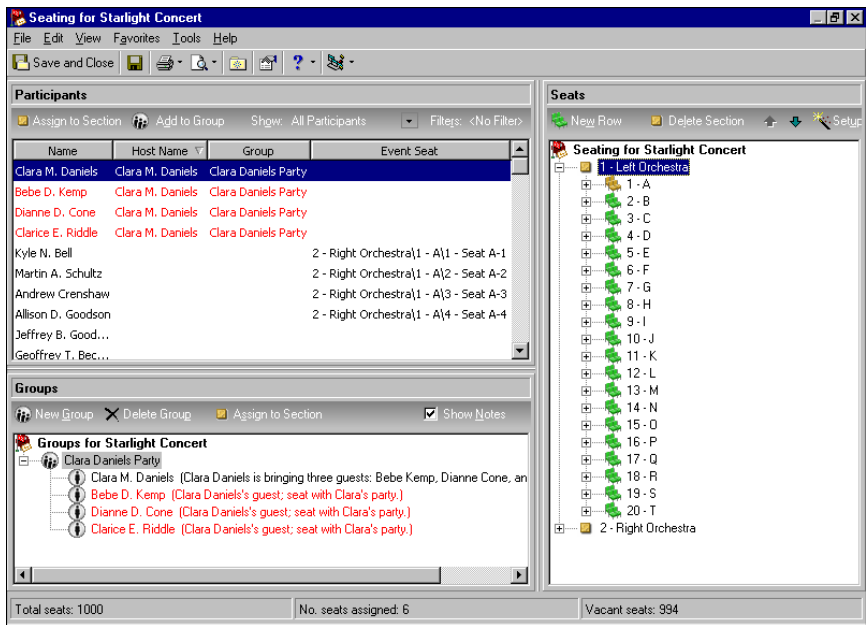
- From the Starlight Concert event record, select the General tab. For information about how to open an event record, see "Open an event record" on page 10.

Note: You can also assign a group to their seats from the General tab of a participant record. You can follow these steps starting with step 2.

- Click **Seating**. The Seating screen appears.
- Under **Groups**, select "Clara Daniels Party".

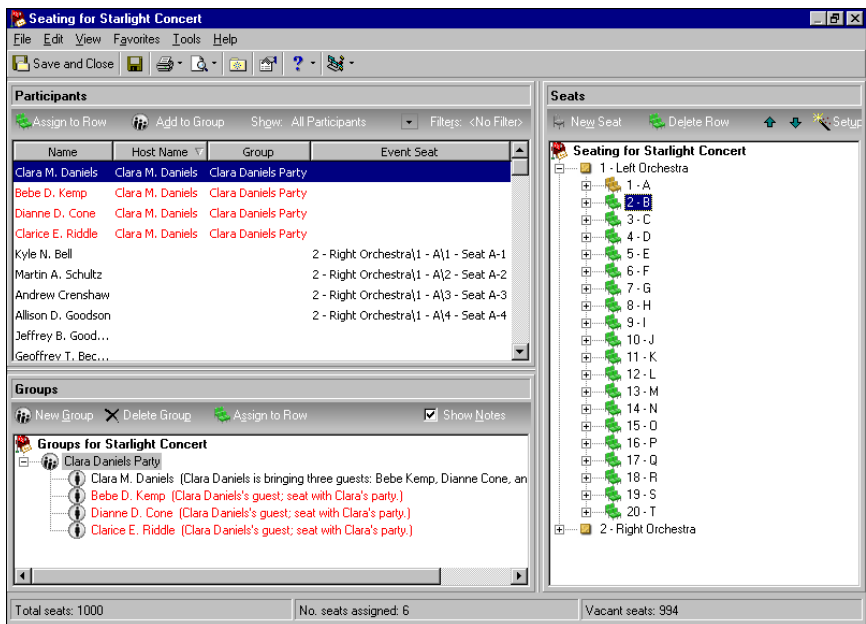


- You decide to assign the group to seats in the first section. Under **Seats**, click the plus sign beside Left Orchestra. The rows within this section appear, rows A - T (1 - 20).



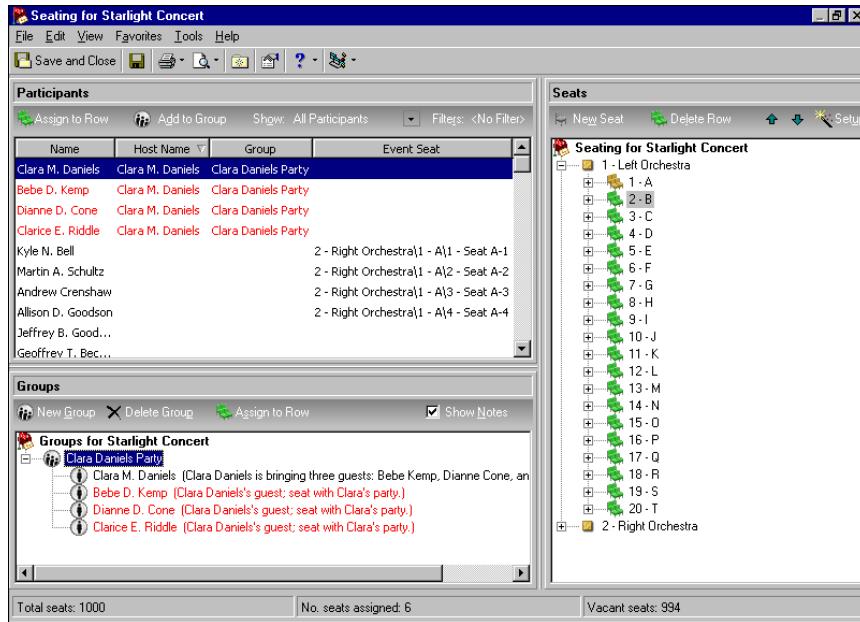
Note: Under **Seats**, an empty section, table, or row has a green icon beside it. A partially full section, table, or row has a yellow icon beside it. A completely full section, table, or row has a red icon.

- You decide to assign this group to seats on the second row of the Left Orchestra. You can tell this row is empty because the icon beside the row is green. Select the second row, "2-B".



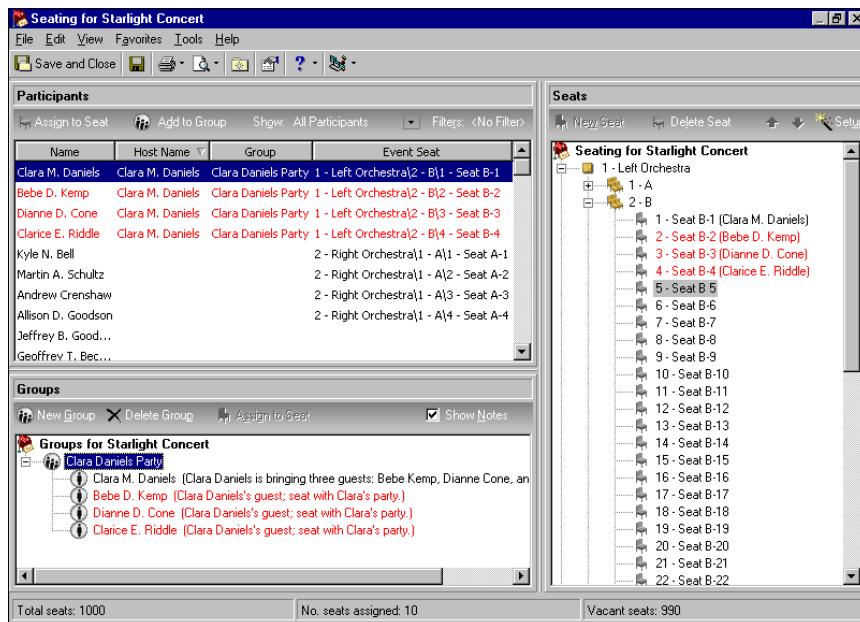
Tip: To quickly assign a group party to their seats, you can also click a group name under **Groups** and drag it to a section, table, or row in the **Seats** frame that has enough seats to accommodate the group.

6. In the **Groups** frame, double-check to make sure “Clara Daniels Party” is still selected.



Note: When you assign a group, if you select a section under **Seats** instead of a particular table or row, the button on the action bar of the **Groups** frame changes to **Assign to Section** and the group is assigned to seats in the first available table or row of that section.

7. On the action bar of the **Groups** frame, click **Assign to Row**. Clara and each of her guests' names appear in parentheses beside Seat B-1 - Seat B-4 under **Seats**. Under **Participants**, in the **Event Seat** column of the grid, the numbers of the sections, row, and seats appear beside their participant names.



8. Continue to group and seat your participants.

Note: If you add a participant to a group under **Groups** after the group has been seated under **Seats**, that participant remains unseated. You must assign him individually to a seat. For information about how to assign a participant to a seat, see “Assign a participant to a seat” on page 76.

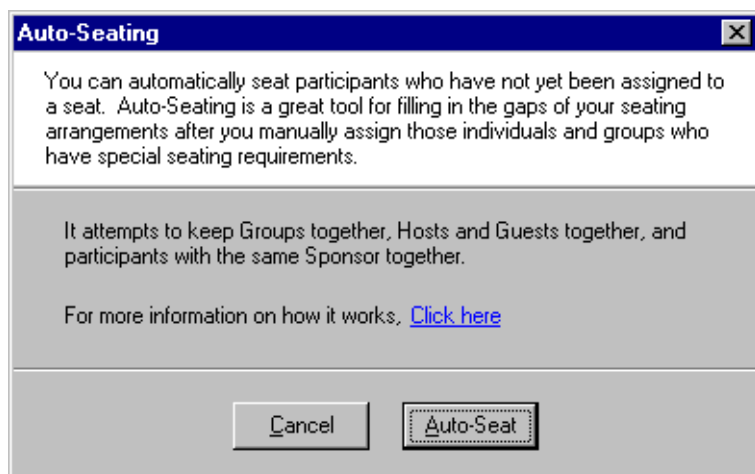
9. After you group and seat participants, click **Save and Close** on the toolbar. You return to the General tab of the event record.
10. On the toolbar, click **Save and Close**.

Automatically Assign Participants to Seats

Once you set up seating arrangements, seating user options, and participant legend colors and formatting, it is time to assign participants to seats. On the Seating screen, you can manually assign participants to seats individually, and you can group participants who request to sit together and manually assign the entire group to seats. We discuss how to do this in “Manually Assign Participants to Seats, Individually and By Groups” on page 74. When you do not want to go through these manual procedures, you can use the Auto-Seating feature.

Tip: Auto-Seating is a great tool to fill in the gaps of your seating arrangements after you manually assign individuals and groups with special seating requirements.

When you use Auto-Seating, the program quickly and automatically assigns participants to seats for you. To access Auto-Seating, from the menu bar of the Seating screen, select **Tools, Auto-Seating**. The Auto-Seating screen appears.



You can use Auto-Seating for different purposes. For example, you hold a casual get-together for your volunteers to meet each other and mingle. You are not concerned about who gets to sit with whom at this event. On the Seating screen, you can use Auto-Seating to assign all participants randomly to seats at tables or rows within your sections.

You may hold an event where you need to be careful when you add participants to groups and assign groups to seats. For example, you host a Bridge Party and Lunch fundraiser. As participants register for the event, on the Seating screen, you place participants in groups (teams) of four. After you create your groups and add the appropriate participants to each group, you can use Auto-Seating to quickly assign each group to a table of four within your sections to keep the teams together.

You can also use Auto-Seating to fill the gaps in your seating arrangements. For example, you manually assigned the majority of your participants to seats individually and by groups. As you go through your registration list, you notice that ten participants signed up late for the event just this week. On the Seating screen, you see you still have enough vacant seats to accommodate these latecomers, but at this point, you cannot worry about where you seat them. With Auto-Seating, you can assign these participants to intermittent empty seats throughout your sections.

How the Auto-Seating Feature Works

When you run the Auto-Seating feature, the program assigns participants to seats in this manner:

- ☐ Only unseated participants are assigned to seats. Participants who have previously been assigned manually to seats under tables, rows, or sections are never moved to any other seat. They remain in their assigned seats.
- ☐ The seating user options you set up on the Records tab of User Options are not considered. Participants are never assigned new seats or multiple seats. Seats are never added to a table, row, or section to accommodate your participants. When enough seats are not available to accommodate your participants, as many participants as possible are assigned to the available seats as described below, and seating stops. The remaining participants are left unseated.
- ☐ The program starts to assign all groups to seats. The largest group of participants is assigned first. The group is assigned to the first largest block of seating (table, row, or section). After the largest group is assigned to seats, the program continues to seat groups descending in size, largest to smallest.
 - When a group is assigned, if any members (participants) of the group are already assigned to a seat at a table, row, or section, those participants are never moved. They remain in their seats and are counted as part of their group to determine the group's size (making it the largest, next largest, and so forth).
 - If any members of the group are already assigned to a seat at a table, row, or section, the program attempts to place the group at the same table, row, or section as the member of the group who you first individually assigned to a seat.
 - If enough seats do not exist at a table, row, or section to accommodate all participants within the group, the program assigns as many participants to seats as possible. The participants in the group who do not get seated are treated as individual participants and assigned later along with the rest of the individual participants, as described in the very last item of this list.
 - The program continues to assign groups to seats according to size, in this manner.
- ☐ After the program assigns participant groups, it looks for the host with the most guests. The program treats the host and his guests as a group and follows the previous rules for seat assignment for groups seats. The program assigns the host with the most guests first, then loops through all hosts/guests by decreasing size.

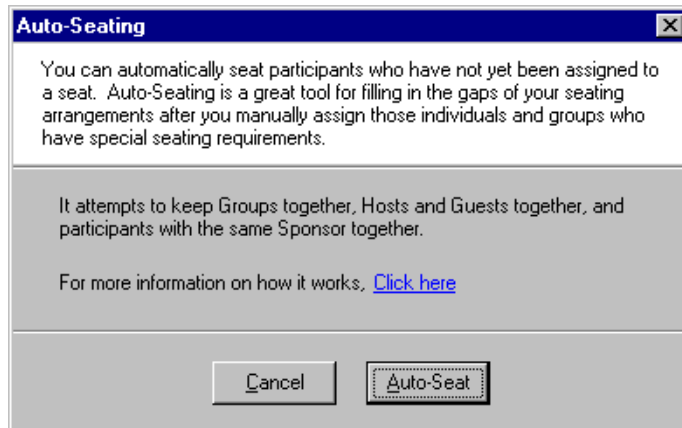
Note: Only sponsors who appear under **Participants** of the Seating screen (the sponsors who have **Do not seat this Participant** unmarked on the General 2 tab of their sponsor records) are counted as part of their sponsored participant groups.

- ☐ After the program assigns hosts/guests, it looks for the sponsor with the most sponsored participants. The program treats the sponsored participants as a group and follows the same previous rules for seat assignment for groups. The program assigns the sponsored participants first to seats, then loops through all sponsors/sponsored participants by decreasing size.
- ☐ After the program assigns sponsors/sponsored participants, it assigns the remaining individual participants to the first open seats at the first available table, row, or section.

► Automatically assign participants to seats

1. From an event record for which you ran the Seating Setup Wizard, set up your seating arrangements, and added participants to the event from the Participants tab, select the General tab. For information about how to open an event record, see "Open an event record" on page 10.
2. Click **Seating**. The Seating screen appears.

3. From the menu bar, select **Tools, Auto-Seating**. The Auto-Seating screen appears.



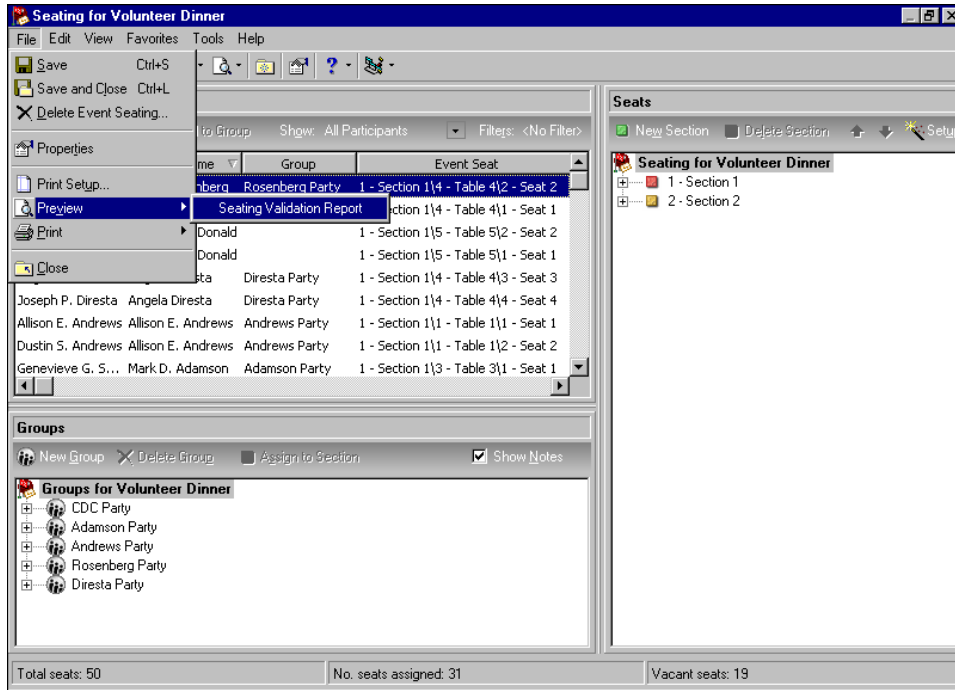
4. Click **Auto-Seat**. The program automatically assigns all participants from the **Groups** and **Participants** frames to seats at tables, rows, or sections under **Seats**.
5. After you automatically seat participants, click **Save and Close** on the toolbar. You return to the General tab of the event record.
6. On the toolbar, click **Save and Close**.

Seating Validation Report

As you assign participants individually and in groups to seats under **Seats**, you can run a Seating Validation Report to help troubleshoot potential seating issues. For example, the report can warn you about participants within a group not seated together, sponsored participants not seated together, guests not seated with a host, and any unseated individual participants.

The report includes a layout summary about sections, tables, rows, or seats added or removed since the last time you accessed the Seating screen or Seating Setup Wizard. It lists all participants who have not yet been seated and generates a seating summary displaying total participants for the event, total number of seats needed, number of seats assigned, and number of seats still available.

As with all reports, on the Reports page, to set up your Seating Validation Reports, you should define the report parameters that are most beneficial to you and your seating needs. After you set up your Seating Validation Reports, to quickly access these reports, select **File, Preview, Seating Validation Report** or **File, Print, Seating Validation Report** from the menu bar of the Seating screen.



The Select a Parameter File screen appears. From this screen, select a parameter file and click **Select**. If, from the **File** menu of the Seating screen, you selected to preview the report, the report appears so you can review the report's information and format before you print a hard copy. If you selected to print the report, a hard copy readily prints.

Seating Validation Report

Volunteer Dinner

Groups Not Seated Together

Participant	Seat
Andrews Party	
Allison E. Andrews	1 {Section 1} \ (Table 1) \ (Seat 1)
Dustin S. Andrews	1 {Section 1} \ (Table 1) \ (Seat 2)
Franklin Andrews	1 {Section 1} \ (Table 1) \ (Seat 3)
Jennifer L. Andrews	1 {Section 1} \ (Table 1) \ (Seat 4)
Margaret A. Andrews	1 {Section 1} \ (Table 1) \ (Seat 5)
Michael R. Andrews	1 {Section 1} \ (Table 2) \ (Seat 1)
Samantha Andrews	1 {Section 1} \ (Table 2) \ (Seat 2)

Layout Summary

Section	Table/Row	No. Of Seats	No. Of Assigned	Number Open
1 {Section 1}	1 {Table 1}	5	5	0
	2 {Table 2}	5	5	0
	3 {Table 3}	5	5	0
	4 {Table 4}	5	5	0
	5 {Table 5}	5	5	0
2 {Section 2}	1 {Table 1}	5	5	0
	2 {Table 2}	5	1	4
	3 {Table 3}	5	0	5
	4 {Table 4}	5	0	5
	5 {Table 5}	5	0	5

Seating Summary

Total number of participants:	32
Number who require seating:	31
Number of seats in venue:	50
Number of seats assigned:	31
Number of open seats remaining:	19
Number of participants left to seat:	0

For information about the Seating Validation Report, all other Event Management reports, and reports in general, see the *Reports Guide*. For sample reports, see the *Sample Reports Guide*.

Dinner Menu Items

You can establish the menu items you serve at your dinner event from the menu bar of the event record. This same list of menu items on the dinner event record appears when you click **More info** on your participant (registrant, guest, or sponsor) records to select their menu preferences. For information about how to select dinner awards for your participants, see "Dinner Preferences" on page 145.

You can set up your Event Menu Items table from the **Tables** link of *Configuration*. For more information, see the Tables section in the *Configuration & Security Guide*.

► Set up menu items for a dinner event

To set up menu items for a dinner event, select **Event, Menu** from the menu bar of a dinner event record.

1. From the menu bar of a dinner event record, select **Event, Menu**. For information about how to open an event record, see "Open an event record" on page 10.

Note: If an entry does not exist in a drop-down list in a field where you must make a selection, you can type your entry in the field if you have security rights established. A message appears to ask whether to add the entry to that table. Select **Yes**. Even though you can add a table entry from a field with a drop-down list, for data entry consistency, we recommend you establish your table entries from the **Tables** link of *Configuration*. For information about how to set up tables, see the *Configuration & Security Guide*.

The Menu Items screen appears.

	Options
<input type="checkbox"/>	Beef Wellington
<input type="checkbox"/>	Chicken Kiev
<input type="checkbox"/>	Trout Almondine
<input type="checkbox"/>	Pasta Primavera
<input type="checkbox"/>	

2. In the **Options** grid, select the menu items to serve at the event. Enter each menu item in a separate row.
3. Click **OK**. You return to the event record.
4. On the toolbar, click **Save and Close**.

Event Awards

You can establish the awards you give out at your event from the menu bar of the event record. This same list of awards on the event record appears when you click **More info** on the participant (registrant, guest, or sponsor) records to select the awards given to your winning participants. For information about how to select event awards for your participants, see “Participant Awards” on page 147.

You can set up your Event Awards table from the **Tables** link of *Configuration*. For more information, see the Tables section in the *Configuration & Security Guide*.

► Set up awards for an event

You can set up awards for an event by selecting **Event, Awards** from the menu bar of the event record.

1. From the menu bar of an event record, select **Event, Awards**. For information about how to open an event record, see “Open an event record” on page 10.

The Awards screen appears.

Award	Recipient	Presented By	Comments
\$100 gift certificate	Mark D. Adamson	Lamar Smith, pre...	Sport Warehouse
Year-long golfing ...	Orla McGrann	Lamar Smith, pre...	Fairfield Country ...
Ping golf clubs an...	Jason D. Campbell	Lamar Simth, pre...	D & T Sports
Lexus	Thomas C. Moorner	Lamar Smith, pre...	City Lexus

2. In the grid, select each **Award** or prize to present at the event. You should enter each award in a separate row.
3. For each award, enter the recipient, or the participant to receive the award. You can enter the recipient in the field or use the binoculars to search for a participant. When found and selected, the participant name appears in the field.
4. In the **Presented By** column, enter the name of the person to hand out each award.
5. Enter any comments about each award. Examples of how to use the **Comments** column include to list who donated the prizes or to keep track of what position wins what prize — first, second, third, or runner up.
6. Click **OK**. You return to the event record.
7. On the toolbar, click **Save and Close**.

Prices for Registration Fees

Registration fees are the amounts of money your organization charges for the levels (or units) of participation at its events. For example, if you host a Holiday Ball, you can have two units of registrations fees, one for couples and one for singles. If you host a golf tournament, you can have several units such as a single, a foursome, or a hole sponsor. When you set up an event where you charge registration fees, you must establish prices. Later, when you add participants to the event, the program uses these prices to calculate registration fees. Only the prices you add on the Prices tab of the event record can be specified on the participant (registrant, guest, or sponsor) records when you add participants. You can track prices for individuals and groups. In addition, you can identify what portion of the price is the actual cost and what is the tax-deductible donation to your organization.

► **Set up registration fee prices for an event**

You can set up registration fee prices on the Prices tab of the event record.

Scenario: Your organization holds its annual golf tournament. You need to set up prices for the different registration fees you charge for participation in the event. Add the registration fee prices on the Prices tab of the golf tournament event record. If you have not added the annual golf tournament event record, see “Add a sporting event” on page 20.

1. From the Annual Golf Tournament event record, select the Prices tab. For information about how to open an event record, see “Open an event record” on page 10.

Unit	Gift Amount	Receipt Amount	Comment
Individual	\$125.00	\$50.00	Greens Fee-\$50, Refreshments-\$75
Foursome	\$400.00	\$175.00	Foursome is \$100 savings
Hole Sponsor	\$200.00	\$75.00	Tee sign recognition
Eagle Sponsor	\$500.00	\$200.00	Banner recognition
Birdie Sponsor	\$300.00	\$125.00	Prize sponsor
Par Sponsor	\$150.00	\$60.00	Program recognition
Hole-in-One Sponsor	\$1,000.00	\$400.00	Banner recognition

No. Participants: 120 No. Registered: 120 No. Attended: 0

2. In the **Unit** column, select “Individual”.
3. In the **Gift Amount** column, enter the amount \$125. This is the entry fee for an individual player. The gift amount is the price.
4. In the **Receipt Amount** column, enter the amount \$50. The receipt amount is the tax-deductible portion of the gift amount that is donated to your organization. The receipt amount is the amount that is not going to fund the event or the benefits associated with the event.
5. In the **Comments** column, enter “Greens Fees-\$50, Refreshments-\$75”.
6. To repeat this process, tab to the next rows to add additional units for the tournament. In the **Unit** column, select “Foursome”, “Hole Sponsor”, “Eagle Sponsor”, “Birdie Sponsor”, “Par Sponsor”, and “Hole-in-One Sponsor”.
7. In the **Gift Amount** column, enter the amount \$400 for the foursome, \$200 for the hole sponsor, \$500 for the eagle sponsor, \$300 for the birdie sponsor, \$150 for the par sponsor, and \$1,000 for the hole-in-one sponsor.
8. In the **Receipt Amount** column, enter the amount \$175 for the foursome, \$75 for the hole sponsor, \$200 for the eagle sponsor, \$125 for the birdie sponsor, \$60 for the par sponsor, and \$400 for the hole-in-one sponsor. This is the tax-deductible amount of the gift given as a donation to your organization.
9. In the **Comments** column, enter any additional comments, such as a further price breakdown or notes concerning the amount of a certain discount.

- After you set up registration fee prices, click **Save and Close** on the toolbar to save and close the Annual Golf Tournament event record.

Benefits

Benefits are gifts your organization gives to participants of an event when they donate a certain amount of money. You can set up default benefits for each unit (level) of registration fee prices on the Prices tab of an event record. For example, if you host a golf tournament, you may give out a golf cap to individual players, a T-shirt to those who participate as a team, and a \$25 pro shop gift certificate to your hole-in-one sponsors.

You can set up default benefits for each unit of the prices grid. To see if benefits are set up for a unit, select the corresponding row. A message appears beside the **Benefits** button on the bottom of the Prices tab to let you know. A red check mark also appears on the **Benefits** button after you set up your benefits.

The benefits you add for each unit of registration fee prices default to all participants (registrants, guests, or sponsors) who have that unit on the Registration Fees tab of their participant record. If you do not want the benefits for each unit of registration fee prices to default to all participants who have that unit on the Registration Fees tab of their participant record, mark **Waive benefits** on the Prices tab.

Add benefits for each unit in the Prices grid

To set up benefits for each unit in the Prices grid, click **Benefits** on the Prices tab.

Scenario: Your organization holds its annual golf tournament. You already set up prices for the event registration fees. You now need to set up benefits for each level of pricing, referred to here as units. Add the benefits on the Prices tab of the golf tournament event record. If you have not added the annual golf tournament event record, see “Add a sporting event” on page 20. If you have not set up registration fee prices, see “Set up registration fee prices for an event” on page 105.

- From the Annual Golf Tournament event record, select the Prices tab. For information about how to open an event record, see “Open an event record” on page 10.

Unit	Gift Amount	Receipt Amount	Comment
Individual	\$125.00	\$50.00	Greens Fee-\$50, Refreshments-\$75
Foursome	\$400.00	\$175.00	Foursome is \$100 savings
Hole Sponsor	\$200.00	\$75.00	Tee sign recognition
Eagle Sponsor	\$500.00	\$200.00	Banner recognition
Birdie Sponsor	\$300.00	\$125.00	Prize sponsor
Par Sponsor	\$150.00	\$60.00	Program recognition
Hole-in-One Sponsor	\$1,000.00	\$400.00	Banner recognition

2. Select a row in the Prices grid to which you have not added benefits. The **Benefits** button is enabled.

Unit	Gift Amount	Receipt Amount	Comment
Individual	\$125.00	\$50.00	Greens Fee-\$50, Refreshments-\$75
Foursome	\$400.00	\$175.00	Foursome is \$100 savings
Hole Sponsor	\$200.00	\$75.00	Tee sign recognition
Eagle Sponsor	\$500.00	\$200.00	Banner recognition
Birdie Sponsor	\$300.00	\$125.00	Prize sponsor
Par Sponsor	\$150.00	\$60.00	Program recognition
Hole-in-One Sponsor	\$1,000.00	\$400.00	Banner recognition

Benefits button: Benefits have not been entered for the Individual

No. Participants: 120 No. Registered: 120 No. Attended: 0

Note: You can mark **Waive benefits** if you do not want the benefits to default to the participants (registrants, guests, or sponsors) who have that unit on the Registration Fees tab of their participant records.

3. Click **Benefits**. The Benefits screen appears.

These benefits will be applied to any participant that has the 'Individual' unit on their Registration Fees tab. Those benefits are then defaulted to any gift added to pay the participant's registration fees.

☐ Waive benefits

Benefit	Count	Unit Cost	Total Benefit/Value	Sent/Fulfilled	Comments
Golfing Cap	1	\$5.00	\$5.00	07/22/2006	Pick up at event
		\$0.00	\$0.00		

Total: \$5.00

Notes:
Individual players can choose between a red, green, or gray cap.

OK Cancel

- In the **Benefit** column of the first empty row, select "Golfing cap".
- In the **Count** column of the same row, enter "1". The participant receives only one cap.
- In the **Unit Cost** column of the same row, enter the amount \$5. This is how much the cap costs your organization.

When you enter a number in the **Count** column and an amount in the **Unit Cost** column, the **Total Benefit/Value** of \$5.00 appears automatically when you tab into this field. The amount appearing in the **Total Benefit/Value** column equals **Count** multiplied by **Unit Cost**.

- In the **Sent/Fulfilled** column of the same row, enter the date 07/22/2006. This is the date you give the caps to the participants of the event.

8. In the **Comments** column of the same row, enter “Pick up at event”. You plan to give out the caps at the tournament.
9. In the **Notes** box, enter “Individual players can choose between a red, green, or gray cap.”
10. Click **OK**. A message may appear to inform you that the total benefit value changed and to ask whether to update the receipt amount to reflect the change. For this scenario, click **No**. You return to the Prices tab of the event record. You can continue to add benefits for each unit on this tab.
11. After you add information to the Annual Golf Tournament event record, click **Save and Close** on the toolbar.

Expenses

Note: From *Reports*, when you use the grid on the Expenses tab, you can run an Event Expense Report in *The Raiser’s Edge* that lists the expenses incurred by one or more events. For more information, see the *Reports Guide*.

An event expense is a debt incurred by your organization as a result of hosting an event such as catering costs, rental fees, mailing costs, and printing fees. When you track the associated expenses, you can ensure accurate reporting on the success of your event.

► Track expenses for an event

You can track your event expenses in the grid on the Expenses tab of an event record.

However, if you configured an interface between *The Raiser’s Edge* and *The Financial Edge* in *Configuration*, the **Financial Edge Transaction Code** field and **View GL Expenses** button appear on the bottom of the tab. When you record your event expenses in *The Financial Edge*, you can still use the grid on the Expenses tab of the event record, but you should enter only the event expense information you do not want to track in *The Financial Edge*. The expenses you enter in the grid on the Expenses tab do not integrate with Blackbaud’s *Financial Edge General Ledger*. For more information about the **Financial Edge Transaction Code** field and **View GL Expenses** button, see “Financial Edge Expenses on an Event Record” on page 110.

Scenario: Your organization holds its annual golf tournament. You rented tables for the party after the tournament from Partytime Rentals. On the Expenses tab of the golf tournament event record, add the expenses incurred from renting the tables. If you have not added the annual golf tournament event record, see “Add a sporting event” on page 20.

Note: From *Reports*, you can run an Event Summary Report in *The Raiser’s Edge* that provides key information about the finances of one or more events. You can include information such as the event ID, the invited participants, registered participants, income, and expenses. For more information, see the *Reports Guide*.

1. From the Annual Golf Tournament event record, select the Expenses tab. For information about how to open an event record, see “Open an event record” on page 10.

Expense Type	Budgeted	Expense	Paid	Date	Vendor
Table Rental	\$1,000.00	\$500.00	\$500.00	07/01/2006	Partytime Rentals

Total Budgeted: \$1,000.00 Total Expense: \$500.00 Over (Under): (\$500.00)

No. Participants: 120 No. Registered: 120 No. Attended: 0

2. In the **Expense Type** column of the first empty row, select “Table Rental”.

Warning: Before you can search and find a vendor to enter in the **Vendor** column of the Expenses grid, you must add the vendor as a participant (registrant, guest, or sponsor). You can do so on the Participants tab of the event record or by clicking **Add New** on the Open screen for participants. You can type the vendor directly into the **Vendor** column if the vendor has been added previously as a participant. For more information, see “Add Participants” on page 123.

3. In the **Budgeted** column of the same row, enter the amount \$1,000. This is the amount of money designated in the golf tournament’s budget for table rental.
4. In the **Expense** column of the same row, enter the amount \$500. This is the actual amount spent on renting tables.
5. In the **Paid** column of the same row, enter the amount \$500. You sent a check for the tables when you placed your order with Partytime Rentals.
6. In the **Date** column of the same row, enter the date 07/01/2006. This is the date you sent the check.
7. On the same row, click in the **Vendor** column to access the binoculars. Click the binoculars to access the Open screen for participants where you can search for Partytime Rentals to track as a vendor for this event.
8. Repeat this procedure as many times as needed to record expenses incurred for this event. The total budgeted, total expenses, and the amount over or under budget appear at the bottom of the Expenses tab.
9. After you add expenses, click **Save and Close** on the toolbar to save and close the Annual Golf Tournament event record.

Financial Edge Expenses on an Event Record

Note: Transaction codes are available with *The Financial Edge Projects and Grants*. To use transaction codes on event records, *The Financial Edge* must be installed on the same workstation as *The Raiser's Edge*, and you must have logged into *The Financial Edge* at least once.

If you have Blackbaud's *The Financial Edge* accounting software, you can interface (integrate) between it and *The Raiser's Edge*. To avoid having to track expenses in both programs, once integrated, you can now record your event expenses in *The Financial Edge* and view these expenses in *The Raiser's Edge*. On the bottom of the Expenses tab of each event record in *The Raiser's Edge*, a **Financial Edge Transaction Code** field and a **View GL Expenses** button appear. You can use the field and button on the bottom of the Expenses tab to view the applicable expenses from *The Financial Edge General Ledger*.

When you record your event expenses in *The Financial Edge*, you can use the top grid on the Expenses tab of the event record, but you should enter only the event expense information you do not want to track in *The Financial Edge*. The expenses you enter here do not integrate with Blackbaud's *Financial Edge General Ledger*.

The screenshot shows the 'New Event' window with the 'Expenses' tab selected. The window has a menu bar (File, Edit, View, Event, Favorites, Tools, Help) and a toolbar with icons for Save and Close, Print, Find, and navigation. The main area contains a table with columns: Expense Type, Budgeted, Expense, Paid, Date, and V. Below the table are summary fields: Total Budgeted, Total Expense, and Over (Under). At the bottom, there is a 'Financial Edge Transaction Code' dropdown menu and a 'View GL Expenses' button. The status bar at the very bottom shows 'No. Participants: 9', 'No. Registered: 6', and 'No. Attended: 0'.

Expense Type	Budgeted	Expense	Paid	Date	V

Total Budgeted: Total Expense: Over (Under):

Financial Edge Transaction Code: View GL Expenses

No. Participants: 9 No. Registered: 6 No. Attended: 0

For the **Financial Edge Transaction Code** field and the **View GL Expenses** button to appear on the bottom of the Expenses tab, you must establish program settings on the General Ledger page of *Configuration* in **The Raiser's Edge**. On the General Ledger page of *Configuration*, you must mark **Blackbaud General Ledger present** and ensure that the specified connection information is valid. Under **Expense Tracking and Appeal Posting**, you must select the transaction code created in **The Financial Edge** to integrate the two programs. For information about how to establish program settings for the interface between **The Raiser's Edge** and **The Financial Edge**, see the *Configuration & Security Guide*.

Expense Tracking and Appeal Posting

Transaction Code:

☒ Apply Transaction Code associated with gift appeal when posting

Automatically generate Transaction Code table entries for new records of the following type:

☒ Appeals

☒ Events

You can then mark **Events**. If you mark **Events**, when you add a new event record, a transaction code table value is created in **The Financial Edge** and mapped back to the event record. For example, in **The Financial Edge**, you decide to set up a new transaction code named "RE Events and Appeals" to track your event and appeal expenses. You select "RE Events and Appeals" in the **Transaction Code** field on the General Ledger page of *Configuration* in **The Raiser's Edge**. After you establish these settings, you add an event record with the name "CPR Training Session." When you save the record, that event name (CPR Training Session) is added to the list of **Financial Edge** code table values you set up for the RE Events and Appeals transaction code. This new code table value automatically appears in the drop-down list in the **Financial Edge Transaction Code** field on the Expenses tab of the CPR Training Session event record. Any other transaction code values previously set up also appear in the drop-down list in the **Financial Edge Transaction Code** field.

CPR Training Session

File Edit View Event Favorites Tools Help

Save and Close

Participants Actions Attributes Media Notes

General Prices Expenses Jobs

Expense Type	Budgeted	Expense	Paid	Date	

Total Budgeted: Total Expense: Over (Under):

Financial Edge Transaction Code: CPR Training Session View GL Expenses

No. Participants: 9 No. Registered: 6 No. Attended: 0

When you click **View GL Expenses**, the Expenses from Financial Edge General Ledger screen appears. The grid displays all expenses (transactions) tracked in *The Financial Edge General Ledger* that are associated with the entry in the **Financial Edge Transaction Code** field. For example, on the CPR Training Session event record, the *Financial Edge* transaction code of CPR Training Session appears in the **Financial Edge Transaction Code** field. When you click **View GL Expenses**, the program retrieves all expenses (transactions) recorded in *The Financial Edge General Ledger* that have a code table value of “CPR Training Session” for the “RE Events and Appeals” transaction code.

Vendor Name	Transaction Type	Amount	Date	Number	Status	Description
<unknown>	Journal Entry	\$55.00		n/a	n/a	Various Journ..
AlphaGraphics	Invoice	\$100.00	03/02/2005	5855	Paid	Extra Copies
AlphaGraphics	Credit Memo	\$(298.00)	02/05/2005	C889	Applied	Credit for Ov..
Mr. John Doe	Check	\$220.00	01/28/2005	1041		Consulting
Office Supplies Inc.	Invoice	\$420.00	02/15/2005		Paid	2 Chairs
Office Supplies Inc.	Invoice	\$420.00	02/15/2005		Paid	2 Chairs
Office Supplies Inc.	Invoice	\$55.00	01/30/2005		Paid	Staplers
Office Supplies Inc.	Invoice	\$15.00	01/30/2005		Paid	Paper Clips

Total Expenses from General Ledger: \$987.00

Note: All *General Ledger* transactions with an encumbrance status of Regular that are related to an account category of Expense appear in the grid for invoices, credit memos, and one-time checks.

The grid on the Expenses from Financial Edge General Ledger screen displays the vendor name, transaction type, amount, date, number, status, and description for each transaction type of credit memo, invoice, and one-time check. The display under the grid shows the total amount of the expenses (transactions) in the grid.

If the source of a transaction cannot be traced to a credit memo, invoice, or one-time check, <Unknown> appears in the **Vendor Name** column, and Journal Entry appears in the **Transaction Type** column. The **Amount** appears as the sum of all transaction amounts that cannot be traced to a credit memo, invoice, or one-time check. No date, number, or status appear.

On the Expenses from Financial Edge General Ledger screen, an **Open** button appears on the action bar. When you select a row in the grid with a known transaction type and click **Open**, that particular invoice, credit memo, or one-time check opens. When you select the <Unknown> row and click **Open** on the action bar, the Expense Transactions from Financial Edge General Ledger screen appears and displays the account numbers, account descriptions, and transaction numbers for all the *General Ledger* transactions that cannot be traced back to an invoice, credit memo, or one-time check. The grid also displays whether the transactions are debits or credits, the dollar amounts of the transactions, and the journal values of the transactions.

Account Number	Account Description	Transaction Number	Transaction Type	Amount	Journal
01-5100-03	Supplies-Administra...	19-017	Debit	\$55.00	Journal Entry

Total Expenses from General Ledger: \$55.00

On the Expense Transactions from Financial Edge General Ledger screen, an **Open** button also appears on the action bar. When you make a selection in the grid and click **Open**, that **General Ledger** transaction record opens. For more information about General Ledger transaction records, see the user guides for **The Financial Edge**.

For more information about integrating the two programs, see *The Raiser's Edge and The Financial Edge: An Integrated Solution for Nonprofits Guide*.

Event Jobs

Event jobs are the tasks, or specialized pieces of work, assigned to volunteers of an event. For example, your conservation organization hosts a walk-a-thon to raise money for your Save the Beaches campaign. Before the event, you need volunteers to help make plans. You need volunteers to make phone calls to ask participants from last year's walk-a-thon if they would like to participate this year and other volunteers to work on letters to send to potentially new participants. You also need volunteers to work with the promotions committee to deliver brochures and flyers to people all over the surrounding area. On the day of the event, you need volunteers to man the registration tables and hand out registration packets. You need volunteers to help with directions and ensure the crowd walks on the right track. You also need volunteers to serve coffee in the morning and distribute bottles of water when the participants start to walk. All these tasks are your event jobs. Before you assign any of these jobs to your volunteers, you must add job records to your database and link each job to the walk-a-thon event record. You can add event job records to your database only when you use the optional module *Volunteer Management*.

When you use the optional module *Volunteer Management*, a Jobs tab appears on all your event records. With the optional module *Volunteer Management*, to add job records to your database, click **New Job** on the action bar of the Jobs tab of an event record. You can also add job records from the shell **File** menu, from the **New Job** link on the Jobs page of *Records*, and from the **File** menu of an existing job record. When you add job records to your database and link them to an event record already in your database, the jobs list in the grid on the Jobs tab of the event record.

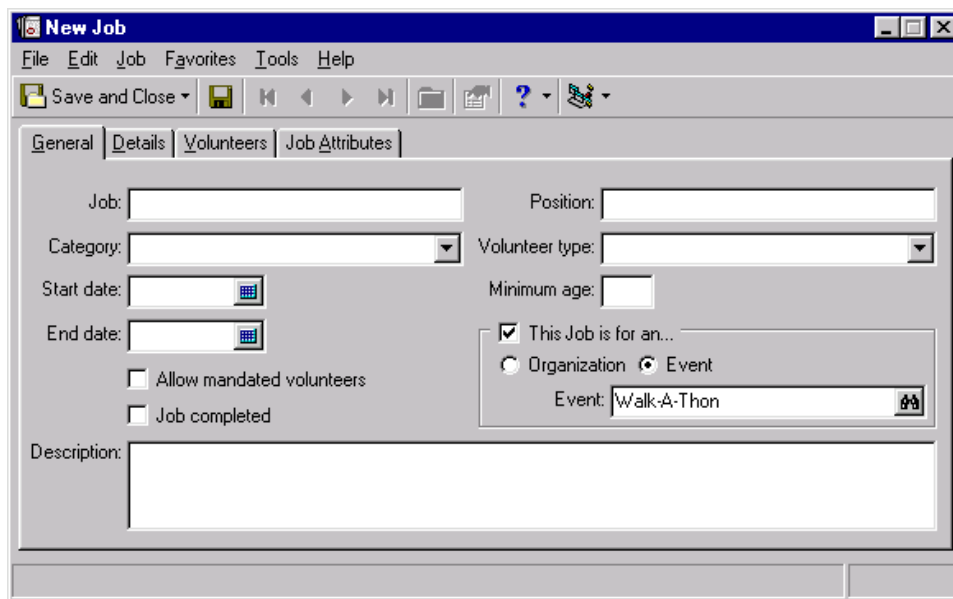
Assignment	Category	Position	Start Date	End Date
Crowd Control	Day of Walk	Monitor	07/27/2007	07/27/2007
Decorations	Day of Walk	Design decorator	07/27/2007	07/27/2007
Refreshments	Day of Walk	Canteen worker	07/27/2007	07/27/2007
Phone calls	Before the Walk		01/01/2007	04/27/2007
Promotion Committee	Before the Walk	Committee member	01/01/2007	04/27/2007

No. Participants: 9 No. Registered: 6 No. Attended: 0

To filter the job records that appear on the Jobs tab, click **Filters** on the action bar above the grid. A filter screen appears so you can decide whether to filter by **Assignment**, **Position**, **Category**, or **Start Date**.



When you add a job record to your database, the New Job screen appears.



A job record includes four tabs: General tab, Details tab, Volunteers tab, and Job Attributes tab. The information you track on each tab is discussed in succession in the Jobs chapter of the *Volunteers & Jobs Data Entry Guide*. Before you add any event job records to your database, we recommend you read the *Volunteers & Jobs Data Entry Guide* in its entirety. From the *Volunteers & Jobs Data Entry Guide*, you learn how to add volunteer information on the Volunteer tab of each of your volunteers' constituent records, job records to your database, manually and automatically find jobs and assign them to a volunteer from the Volunteer tab of each of your volunteers' constituent records, and automatically find volunteers and assign them to a job from the menu bar of the job record itself.

Event Actions

On the Actions tab of an event record, you can track the communications you make about your event, as well as the tasks associated with these communications. When you click **New Action** on the action bar on the Actions tab, you can add phone calls, meetings, mailings, email, tasks, and any other types of actions, if you have rights established from the **Security** link of *Configuration*.

The screenshot shows a 'New Action' dialog box with a menu bar (File, Edit, View, Action, Favorites, Tools, Help) and a toolbar with icons for saving, printing, and navigating. The 'General' tab is active, showing fields for Name, ID, Category, Action type, Action date, Start time, End time, Solicitor(s), Status, Action completed on, Letter, Document, Priority, Campaign, Fund, and Proposal. The 'Completed' status is indicated in the top right corner. The 'Auto-Remind' checkbox is checked, and the 'Notify' checkbox is also checked. The 'Set reminder for' field is set to 1 week(s) beforehand. The 'View Track Template' button is at the bottom left.

New Action

File Edit View Action Favorites Tools Help

Save and Close

General Attributes/Notes

Name: Annual Golf Tournament ID: GOLF **Completed**

Category: ☐ Phone Call ☐ Meeting ☒ Mailing ☐ E-mail ☐ Task/Other

Action type: Invitation

Action date: 05/04/2006

Start time: End time:

☒ Solicitor(s) Anne Sinclair

Status: Completed

☒ Action completed on 05/04/2006

Letter: Tournament Invitation

Document:

☒ Auto-Remind

☒ Notify Gina

Set reminder for 1 week(s) beforehand

Priority: ☐ High ☒ Normal ☐ Low

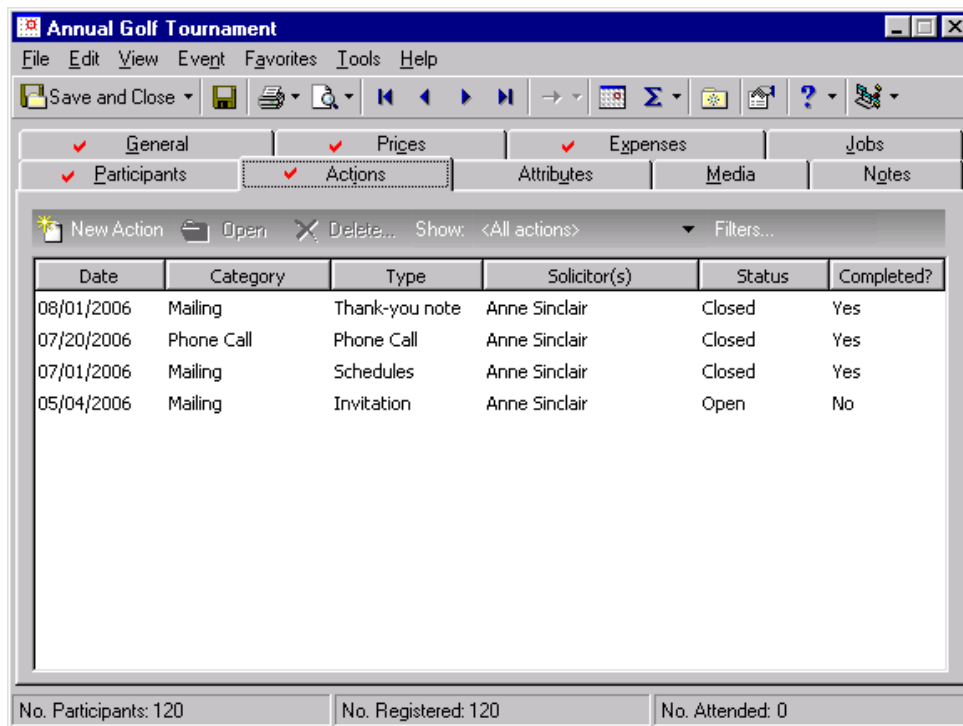
Campaign: Endowment Campaign

Fund: Annabelle Johnson Endowment

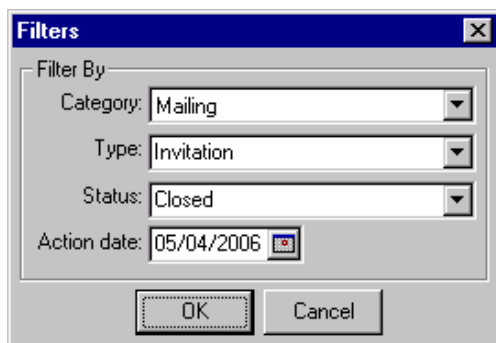
Proposal:

View Track Template

To add event actions, you can also click **New Action** on the Actions page of *Records*. The actions you add for the event appear in the Actions grid with columns that display the **Date**, **Category**, **Type**, **Solicitor(s)**, **Status**, and whether the action is **Completed**. You can determine the columns to view on the Actions tab. The ones listed are the default columns. The Actions tab of the event record helps you keep your event correspondences and tasks organized.



To filter the actions that appear on the Actions tab, click **Filters** on the action bar above the grid. A filter screen appears so you can decide whether to filter by **Category**, **Type**, **Status**, or **Action date**.



You can also add Action tracks for event actions. To add event action tracks, select **Tools, Action Tracks, Assign Event Action Tracks** from the menu bar. With action tracks, you can add a predefined set of actions for an event. For example, for a golf tournament, a track would be ideal. On 06/01/2006, you send out handwritten invitations for the tournament. A month later, you need to mail schedules for the event to registered participants. A week before the tournament, you need to make phone calls to all registered participants to remind them of the start time and ask if they have any questions. One week after the tournament, you need to send handwritten thank you notes to all participants who attended the event. All these actions are added as a track, with one action occurring as the result of the completion of another. This ensures each action takes place in the correct sequence and at the correct time.

For information about actions and action tracks, see the Actions chapter of the *Constituent Data Entry Guide*.

Event Attributes

On the Attributes tab of an event record, you can store additional, helpful information about an event. For example, you can track the success rate of your event; whether it was highly successful, moderately successful, or not successful. You can track whether your event takes place indoor, outdoor, or both. You can track the prizes that were donated and profitability margins. You can create unlimited attributes to track important information about your event.

Category	Description	Short Desc.	Date	Comments
Event Locale	Indoor/Outdoor		05/04/2006	Tournament-outdoors;dinne...
Event Success Rate	Highly successful		05/04/2006	Previous tournaments - 100...
Prizes Donated	\$100 gift certificate		05/04/2006	Downtown Sports
Prizes Donated	Year golfing pass - Fai...		05/04/2006	Fairfield Country Club
Prizes Donated	Lexus		05/04/2006	Charlestowne Lexus

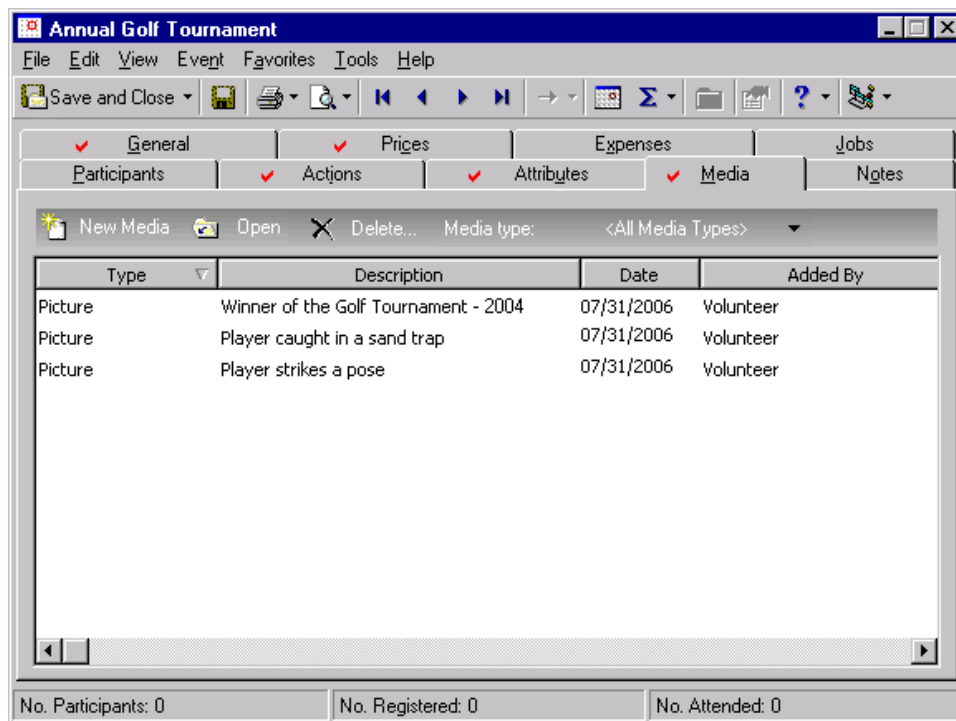
No. Participants: 120 No. Registered: 120 No. Attended: 0

Although you set up attributes from the **Attributes** link of *Configuration*, you can add attributes to an event record from this tab, if you have rights established from the **Security** link of *Configuration*. Select your attributes from the **Category** column in the Attributes grid and enter information in the **Description**, **Short Desc.**, **Date**, and **Comments** columns. From the **Attribute category** field on the action bar above the grid, you can choose which attributes list on this tab. You can display all attributes or one specific attribute category. If you want to view all attribute categories, select <All Categories>. For information about how to add attributes, see the *Configuration & Security Guide*.

For information about attributes, see the Attributes, Notes, Media, and Appeals chapter of the *Constituent Data Entry Guide*. The Attributes tab of an event record works the same as the Attributes tab of a constituent record.

Event Media Items

The Media tab uses Object Linking and Embedding (OLE) to store newspaper clippings, letters, pictures, graphs, and other important data about your event.



Note: If an entry does not exist in a drop-down list in a field where you must make a selection, you can always type your entry directly into the field if you have security rights established. A message appears to ask whether to add the entry to that table. Select **Yes**. Even though you can add a table entry from a field with a drop-down list, for data entry consistency, we recommend you establish your table entries from the **Tables** link of *Configuration*. For information about how to set up tables, see the *Configuration & Security Guide*.

From the Media tab, you can add a new media object, open an existing media object, or delete a media object, if you have rights established from the **Security** link of *Configuration*. To filter the type of media object to view in the Media grid, select from the **Media type** list on the action bar above the grid. When you select **New Media**, the Media screen appears so you can add a new media object.

New Media for Annual Golf Tournament

File Edit View Media Help

Save and Close [Save Icon] [Delete Icon] [Navigation Icons]

Date: 07/31/2006 [Calendar Icon] Title: Sand Trap

Type: Picture [Dropdown] Author: Rob [Dropdown]

Description: Player caught in a sand trap

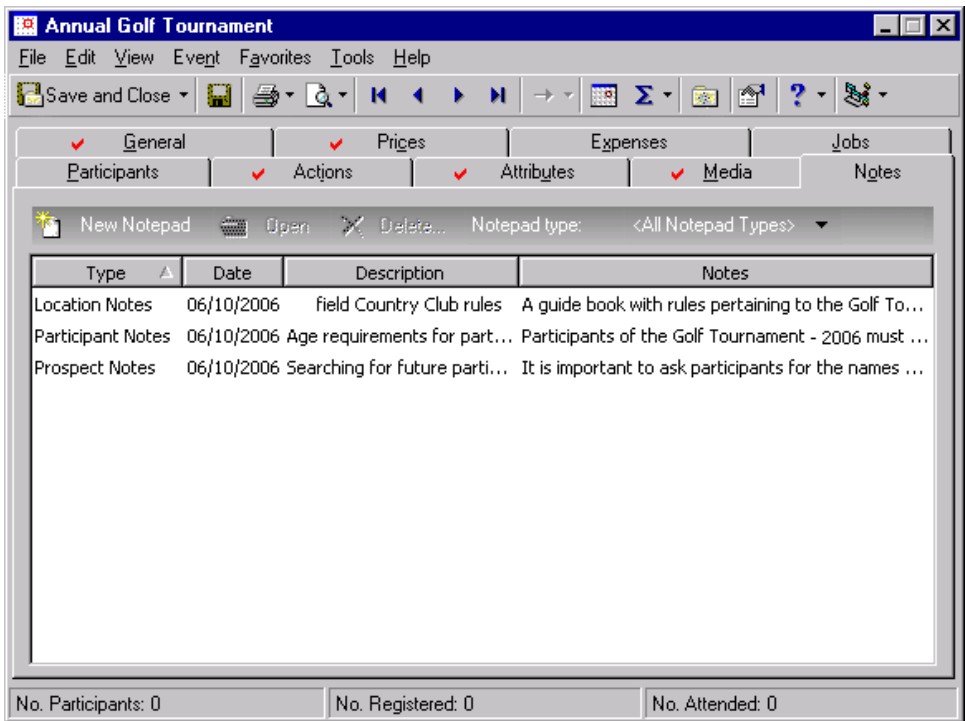
[Image of a golfer swinging a club and splashing sand]

For information about adding, editing, and deleting media objects, see the Attributes, Notes, Media, and Appeals chapter of the *Constituent Data Entry Guide*. The Media tab of an event record works the same as the Media tab of a constituent record.

Event Notes

On the Notes tab, you can store multiple notepads associated with an event. Notepads hold free-form text and comments. You must assign each notepad a **Type** to define the purpose of the contents. You should also assign the **Date** you established the notes and a **Description**, which is a quick summary of your notes. Fields are also available for an author and a title.

For example, you can store many notepads for a tennis or golf tournament. You can add Location Notes, Participant Notes, Prospect Notes, and any other notes relating to the tournament.



Note: When you add notes to a notepad on an event record, you can add time stamps to designate who added text to the note and when the text was added. In the notepad grid, place your cursor in front of the section of the note you want to stamp and press **F5** on your keyboard. Your login name and today's date appear before that section of text.

From the Notes tab, you can add a new notepad, open a notepad, or delete a notepad, if you have security rights established from the **Security** link of *Configuration*. To filter the types of notepads to view in the Notes grid, select from the **Notepad type** list on the action bar above the grid. When you select **New Notepad**, the Notepad screen appears so you can add a new note about the event.

Tip: To easily import and export notepad contents, right-click in the text box and select **Load from File** or **Save to File**.

For information about how to add, edit, and delete notes, see the Attributes, Notes, Media, and Appeals chapter of the *Constituent Data Entry Guide*. The Notes tab of an event record works the same as the Notes tab of a constituent record.

Event Annotation

Tip: Some examples of annotations include “This event starts tomorrow,” “See Doug Ziegler before you change the event record,” or “Invitations have not been sent for this event.”

You can store one annotation, or note, for each event record. The annotation should be a quick reminder type of note. You can add an annotation by selecting **Edit, Annotate** from the menu bar of an event record. On the Annotate screen, you can choose to display the annotation automatically when a user opens the event record. This is especially useful if the note discusses something important every user should know about the event. If you choose to not display the annotation automatically when the event record is opened, users must select **Edit, Annotate** from the menu bar of an event record to display your annotation.

► Add an annotation for an event

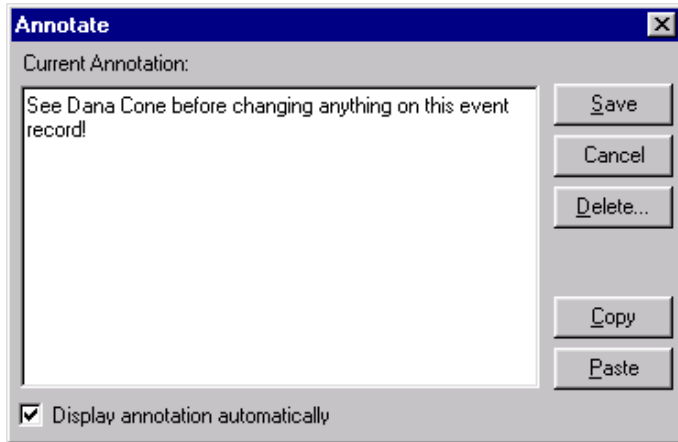
Tip: To quickly access the Annotate screen, press **CTRL + T** on your keyboard.

An annotation should be a quick reminder type of note.

1. From the event record, select **Edit, Annotate** from the menu bar.

Note: On the Annotate screen, you can cancel the annotation if you decide to not add the annotation; delete the annotation; or copy and paste your annotation.

The Annotate screen appears.



2. In the **Current Annotation** box, enter your annotation or note.
3. To automatically display the annotation each time a user opens the event record, mark **Display annotation automatically**.

If you do not mark this checkbox, after you save your annotation, users must select **Edit, Annotate** from the menu bar of the event record to view your annotation.

4. Click **Save**. You return to the event record.
5. On the toolbar, click **Save and Close**.

Copy an Event Record

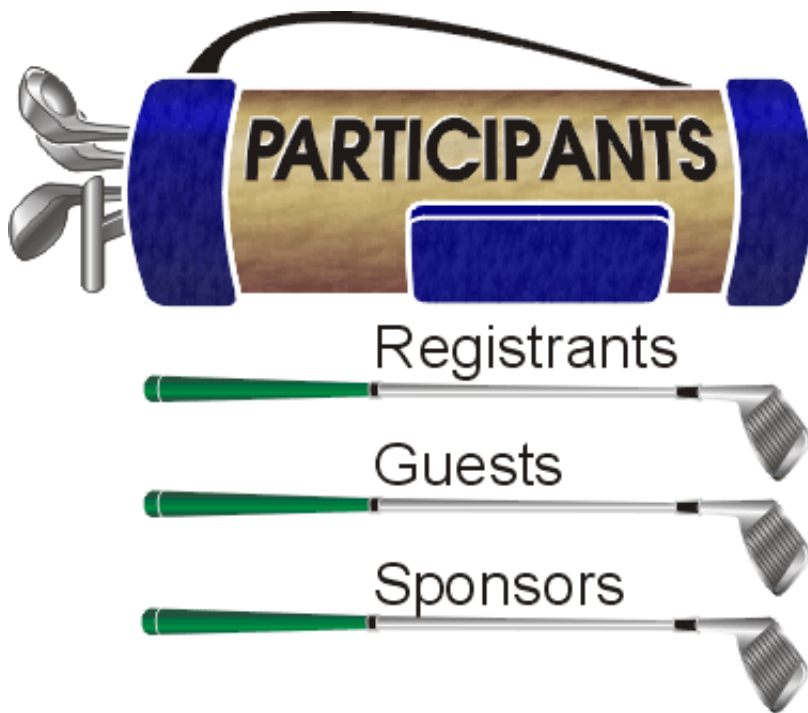
To easily set up a new event, you can copy an existing event record. This helps if you hold the same event regularly, such as each month or year, because you do not have to set up a lot of the event record again.

When you copy an event, the information in these fields and options copies over: **Category, Description, Type, Group, Goal, Itinerary desc., Capacity, No. invited, Display on 'Calendar of Events', No. classes** (class event only), and **Frequency** (class event only) from the General tab; gift defaults; **Awards; Menu** (dinner event only); all entries on the Prices tab; and **Expense Type, Budgeted**, and **Comments** from the Expenses tab. You can change the information copied over on the new event record.

► Copy an event record

1. From the menu bar of an existing event record, select **Event, Copy Event**. The new event record appears.
2. Add or edit the event information as necessary.
3. On the toolbar, click **Save and Close**.

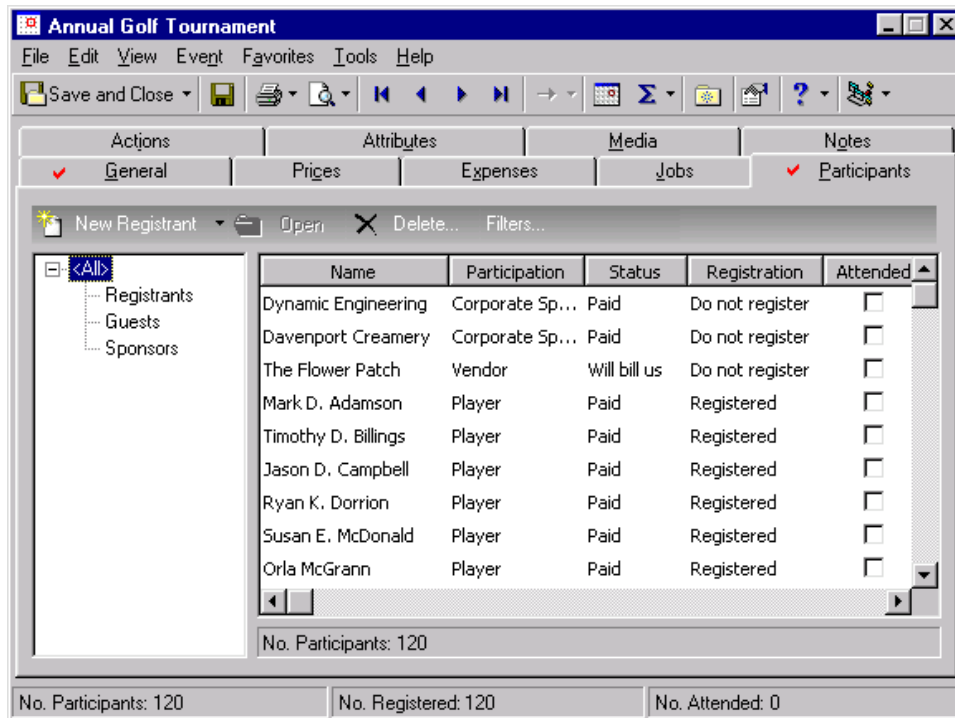
Add Participants



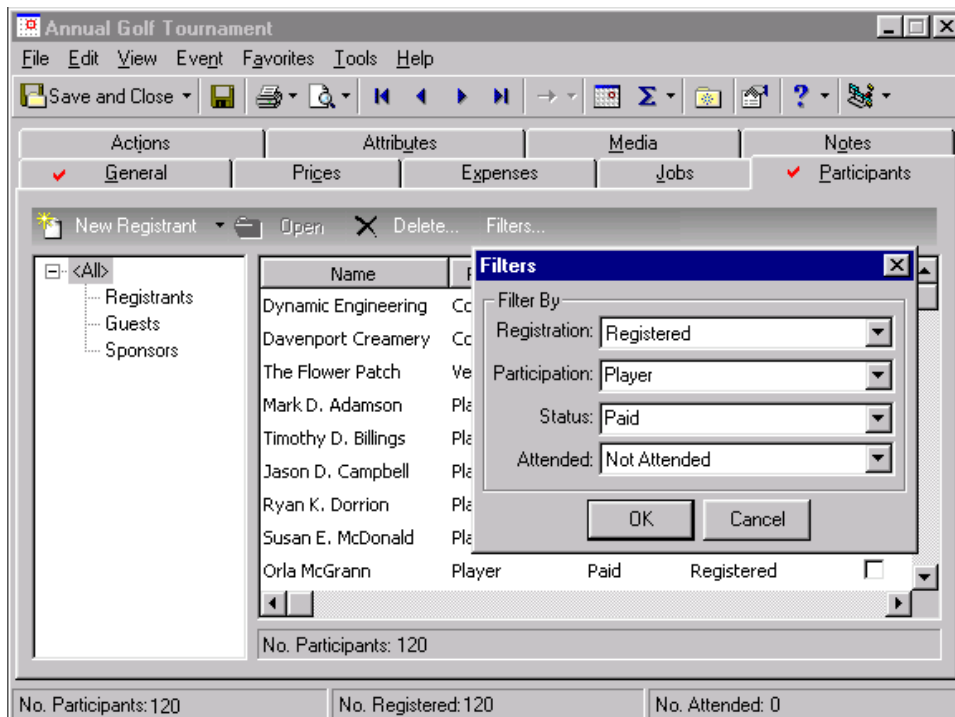
Note: On the action bar, you can access **New Registrant**, **New Guest**, and **New Sponsor** from the drop-down list. All three options are always available regardless of what you select in the tree view.

The optional module *Event Management* is divided into two major parts. The first part, discussed in the Set up an Event section, involves the setup of an event record and encompasses the General, Prices, Expenses, Jobs (when you use *Volunteer Management*), Actions, Attributes, Media, and Notes tabs of the event record. The second part, discussed in this section, involves participants. You can add participants (registrants, guests, and sponsors) for your event from the Participants tab of an event record. You can select the type of participant to add from the tree view on the left. When you select **Registrants** from the tree view, **New Registrant** appears on the action bar above the tree view. When you select **Guests**, **New Guest** appears, and when you select **Sponsors**, **New Sponsor** appears. As you add participants, each participant appears in the grid on the Participants tab.

When you select from the tree view, you also determine what appears in the grid on the right. When you select **Registrants**, only registrants appear. When you select **Guests** or **Sponsors**, only guests or sponsors appear. When you select **<All>**, all registrants, guests, and sponsors you added appear.



To further filter what appears in the grid, click **Filters** on the action bar and complete the **Registration**, **Participation**, **Status**, or **Attended** fields on the Filters screen.



General Participant Information

Note: From *Reports*, you can run a Sporting Event Roster to list participants and their involvement in a sporting event. You select the information to include. For more information, see the *Reports Guide*.

When you add a new registrant, guest, or sponsor from the Participants tab of an event record, you must enter the participant's name on the General tab of the new participant record that is created. You can then add basic participant information on the same tab such as the participant's address, phone information, how he participates in the event, whether he was invited and responded to the invitation, and if he registered.

Registrants

Registrants are the event's attendees, players, team captains, coordinators, instructors, vendors and other businesses that supply a service or product for the event, or any other person involved with the event.

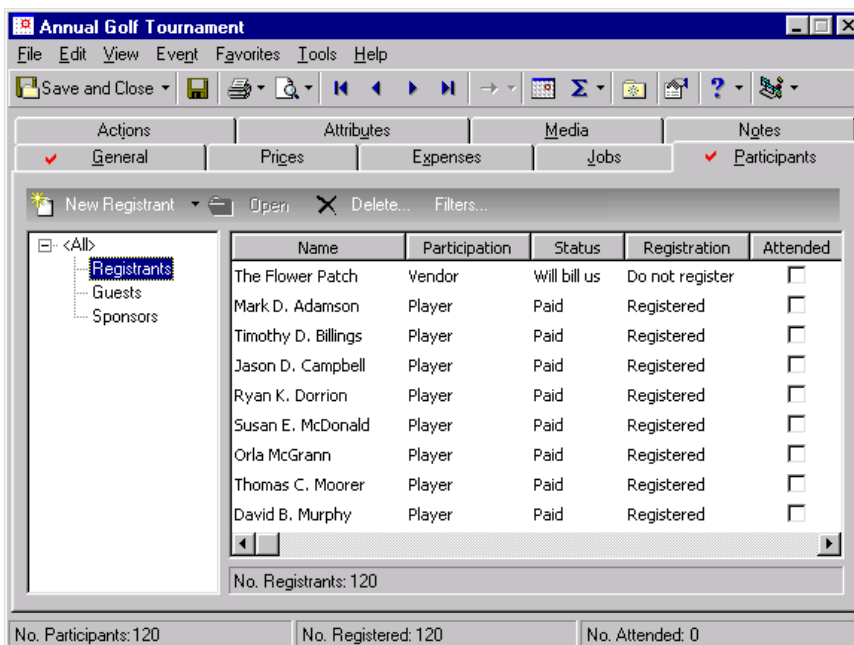
► Add registrants to an event

Note: You can globally add registrants, who are constituents in your database, to an event. For information, see the Globally Adding Registrants to an Event section of the Globally Add Records chapter of the *Global Add, Delete, & Change Guide*.

You can add registrants from the Participants tab of an event record.

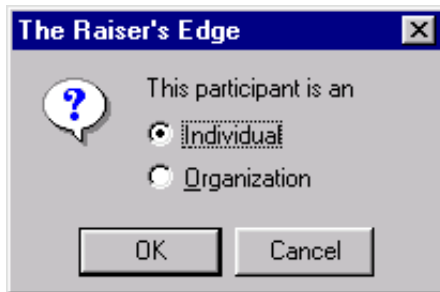
Scenario: Your organization hold its annual golf tournament. You receive Richard Frederick Smith, Sr.'s registration form. After you set up the event, add Richard as a registrant. If you have not added the annual golf tournament event record, see "Add a sporting event" on page 20.

1. From the Annual Golf Tournament event record, select the Participants tab. For information about how to open an event record, see "Open an event record" on page 10.



Note: If you change a record and notice your changes are not updated automatically, click **Save** on the toolbar before you add additional information.

- From the tree view on the left, select **Registrants**. Only registrants appear in the grid on the right.
- On the action bar, click **New Registrant**. A message appears to ask whether this participant is an individual or organization.



- Select **Individual**.

Warning: Registrants are not required to be constituents in your database. If you decide to add a registrant as a constituent, select **Add this participant as a constituent** from the **Participant** menu of the registrant record.

- Click **OK**. The Participant Biographical Information screen appears.

Phones/Email/Links		
DNC	Type	Number/Email Address
	Home	843-555-3105

Warning: Never assume a participant is not in the database. We recommend you click the binoculars in the **Name** field to search the database for the person to avoid duplicate entries. Perhaps a co-worker entered the constituent name differently, at an earlier time, without your knowledge.

- In the **Last name** field, enter "Smith"; in the **First name** field, enter "Richard"; and in the **Middle name** field, enter "Frederick".
- In the first **Titles** field, select "Mr."
- In the first **Suffixes** field, select "Sr."

Names can have up to two titles and suffixes. If Richard had an alias, you would click **Aliases** and enter it on the Aliases screen that appears. He does not, so you do not have to enter anything. When you search for participants, you can search for the constituent by the alias when you mark **Check aliases** on the Open screen that appears.

- Enter Richard's address, mailing, and phone information as shown in the picture above. For information about how to add an address, see the *Program Basics Guide* or the *Constituent Records and Constituent Mailing Information* chapters of the *Constituent Data Entry Guide*.

Note: When you change a participant address and save your changes, if the address is linked to other records, a message appears to inform you that the address is shared and will also update on all the other records. To help determine whether to change the address, you can view a list of records that share the address. Click **Show Shared Addresses**.

- On the toolbar, click **Save and Close**. The registrant record appears.

- In the **Solicitor** field, click the binoculars to search for "David Murphy". David Murphy is the solicitor who persuaded Richard to participate in this tournament.
- In the **Participation** field, select "Captain". Richard serves as a team captain. If Richard participates as a regular player, coordinator, or volunteer, enter that type here.
- In the **Status** field, select "Paid" because you received a check for Richard's registration fee. You can use this field any way that is best for your organization. We recommend you use it as the participant's paid or not paid status.
- In the **Invite?** field, select "Invited". In the accompanying date field, enter the date you sent an invitation.

Note: If the event is a class, a **Grade** field appears under the **Sponsored by** field.

- In the **Response** field, select "Accepted" because Richard sent in his registration form to confirm he would play in the tournament. In the accompanying date field, enter the date he accepted.
- In the **Registration** field, select "Registered" because you received Richard's registration form. In the accompanying date field, enter the date you registered him or the date you received the registration form.

Warning: When you click the binoculars to search for Bottling Unlimited, you can only find Bottling Unlimited if you previously entered this organization as a sponsor. For information about how to add sponsors, see "Add sponsors to an event" on page 138.

- In the **Sponsored by** field, click the binoculars. The Open screen for participants appears where you can search for "Bottling Unlimited", the organization that sponsors Richard in the tournament. The **Sponsored by** field is not required. Registrants do not always have sponsors.
- After the tournament, come back to the registrant record for Richard and mark **Participant has attended**.

19. Because you decided to add Richard as a constituent in your database, select **Add this participant as a constituent** from the **Participant** menu of Richard's registrant record and add him as a constituent. A message appears to ask whether to add a constituent code for Richard.

Note: Seating setup for a registrant is discussed in “Set Up Seating on the Participant Record” on page 151.

20. Add constituency information as shown in the previous picture. For information about constituent codes, see the *Constituent Data Entry Guide*. Click **OK**. You return to the General 1 tab of Richard's registrant record.
21. Click **OK**. You return to the General tab of Richard's registrant record.
22. In the **Registrant** field, click the ellipsis. The Participant Biographical Information screen reappears. In the **ID** field, enter a constituent identification number. If you set the business rule in *Configuration*, the program automatically generates a unique ID. We recommend you set this rule to eliminate errors and duplicate IDs.
23. Click **Save and Close**. You return to the Registrant record.

Tip: When you mark **Participant is a coordinator**, the participant's name appears automatically in the **Coordinators** field on the General tab of the event record.

24. Richard is a coordinator for the event, so you need to mark **Participant is a coordinator**. A message appears to ask whether to add a job assignment for Richard. If you click **Yes**, the program asks you to add a job assignment for Richard. If you click **No**, you can move on without having to add a job assignment. For now, click **No**. This message appears only when you use the optional module *Volunteer Management* and the participant is a constituent in your database. For information about the optional module *Volunteer Management*, job records, and job assignments, see the *Volunteers & Jobs Data Entry Guide*.

Note: When you integrate *The Raiser's Edge* with *Blackbaud NetCommunity*, a **NetCommunity registration** checkbox appears on the General tab of a participant record. This checkbox indicates whether the participant registered for the event on your *Blackbaud NetCommunity* website. When the event registration transaction is downloaded from *Blackbaud NetCommunity*, the checkbox is automatically marked. You can also manually mark this checkbox when needed. For information, see the *Blackbaud NetCommunity Integration Guide*.

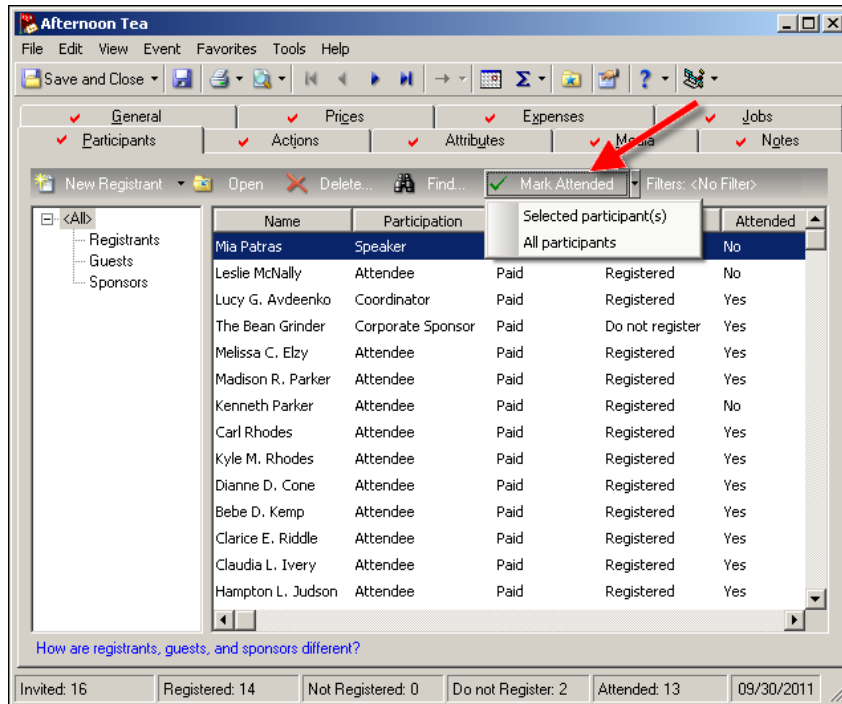
25. After you add information on the General tab of Richard's registrant record, click **Save and Close** on the toolbar. You return to the Participants tab of the Annual Golf Tournament event record.
26. Click **Save and Close**.

Mark Registrants as Attended or Unattended

After an event is held, you can mark registrants as attended or unattended from the Participants tab of the event record. You can mark a group of registrants as attended or unattended, or one registrant at a time.

► **Mark registrants as attended**

1. From the Participants tab of an event record, select a registrant and click **Mark Attended** on the action bar. The registrant is marked as attended.



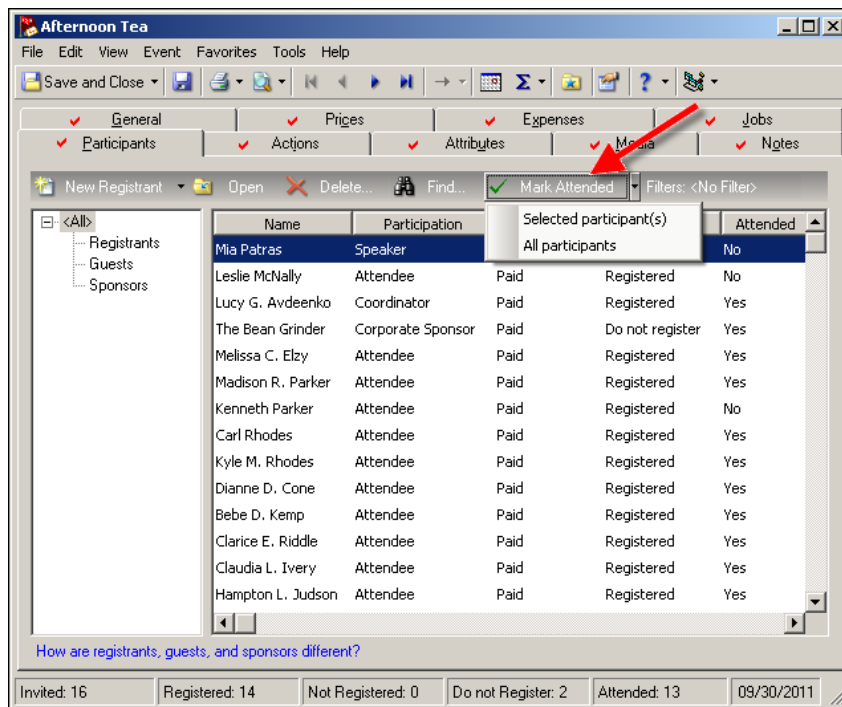
2. To mark a group of registrants as attended, click the arrow on the **Mark Attended** button and select **Selected participant(s)** or **All participants**.

To select multiple registrants, hold down **CTRL** on your keyboard, and select the constituents to mark as attended.

- If you selected **Selected participant(s)**, the registrants are marked as attended.
- If you selected **All participants**, every registrant on the Participants tab is marked as attended.

► Mark registrants as unattended

1. From the Participants tab of an event record, select a registrant that is currently marked as attended, and click **Mark Unattended** on the action bar. The registrant is marked as unattended.



2. To mark a group of registrants as unattended, click the arrow on the **Mark Unattended** button and select **Selected participant(s)** or **All participants**.

To select multiple registrants, hold down **CTRL** on your keyboard, and select the constituents to mark as unattended.

- If you selected **Selected participant(s)**, the registrants are marked as unattended.
- If you selected **All participants**, every registrant on the Participants tab is marked as unattended.

Guests

A guest is an individual or organization that attends an event as an invitee (guest) of a registrant. You primarily add guests from the Participants tab of an event record, but can add guests from the General 1 tab of a registrant record.

Once you add a guest record, you can quickly change the guest to a registrant when necessary. From the menu bar of the guest record, select **Participant, Convert to Registrant**.

► **Add guests to an event from the Participants tab**

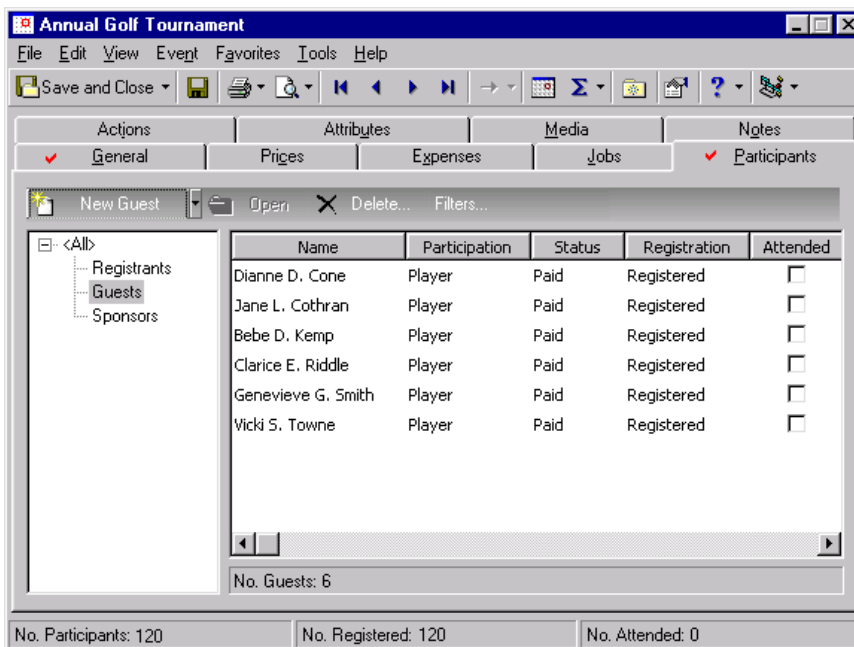
Guests should primarily be added from the Participants tab of an event record.

Scenario: Your organization holds its annual golf tournament. Richard Frederick Smith, Sr., a registrant of the tournament, lets you know he plans to bring a guest, Betsy Graack. Betsy is already a constituent in your database. Add Betsy as a guest. If you have not added the annual golf tournament event record, see “Add a sporting event” on page 20. If you have not added Richard as a registrant, see “Add registrants to an event” on page 125.

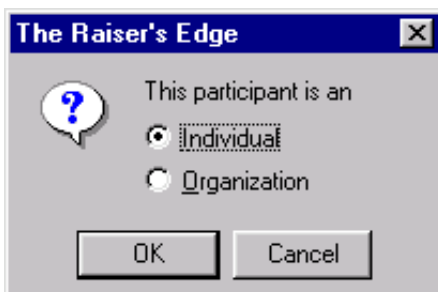
1. From the Annual Golf Tournament event record, select the Participants tab. For information about how to open an event record, see “Open an event record” on page 10.

Note: You can globally add guests, who are constituents in your database, to an event. For information, see the Globally Adding Guests to an Event section of the Globally Add Records chapter of the *Global Add, Delete, & Change Guide*.

2. From the tree view on the left, select **Guests**. Only guests appear in the grid on the right.



3. On the action bar above the tree view, click **New Guest**. A message appears to ask whether this participant is an individual or an organization.



4. Mark **Individual**.

5. Click **OK**. The Participant Biographical Information screen appears.

DNC	Type	Number/Email Address
	Home	973-555-1105

6. In the **Last name** field, click the binoculars. The Open screen for constituents appears, so you can search your database for Betsy Graack to add as a guest. When found and selected, Betsy's full name appears automatically in the Name fields on the Participant Biographical Information screen. For information about the Open screen, see the *Program Basics Guide*.
7. Betsy's address appears automatically in the Address fields because it defaults from her constituent record. To edit her address, click **More** to access the Address screen. For information about how to add an address, see the *Program Basics Guide* or the Constituent Records and Constituent Mailing Information chapters of the *Constituent Data Entry Guide*.

Note: When you change a participant address and save your changes, if the address is linked to other records, a message appears to inform you that the address is shared and will also update on all the other records. To help determine whether to change the address, you can view a list of records that share the address. Click **Show Shared Addresses**.

8. Betsy's phone information appears automatically in the **Phones/Email/Links** grid because it defaults in from her constituent record. If the home phone is already in the grid, you can add other types of phone numbers, fax numbers, or email addresses. In the next empty row of the **Phones/Email/Links** grid, select a **Type** and enter the **Number/Email Address**.

Note: Seating setup for a guest is discussed in "Set Up Seating on the Participant Record" on page 151.

9. On the toolbar, click **Save and Close**. The guest record appears.

10. In the **Solicitor** field, click the binoculars to search for “David Murphy”. David Murphy is the solicitor who persuaded Richard and his guest to participate in this tournament.
11. In the **Participation** field, select “Player”. If Betsy participates as a team captain, coordinator, or a volunteer, you would enter that type here.
12. In the **Status** field, select “Bill later” because Betsy wants you to send her a bill for his registration fees.
13. In the **Invite?** field, select “Invited”. In the accompanying date field, enter the date you sent Betsy an invitation. When Richard let you know he plans to bring Betsy as a guest, you immediately sent her an invitation.
14. In the **Response** field, select “Accepted” because Betsy sent in her registration form to confirm she would play in the tournament. In the accompanying date field, enter the date she accepted.
15. In the **Registration** field, select “Registered” because you received Betsy’s registration form. In the accompanying date field, enter the date you received the form.
16. In the **Guest of** field, click the binoculars to search for “Richard Frederick Smith,” the registrant bringing Betsy to the tournament.
17. After the tournament, open Betsy’s record and mark **Participant has attended**.
18. After you add information on the General 1 tab of Betsy’s guest record, click **Save and Close** on the toolbar. You return to the Participants tab of the Annual Golf Tournament event record.
19. Click **Save and Close**.

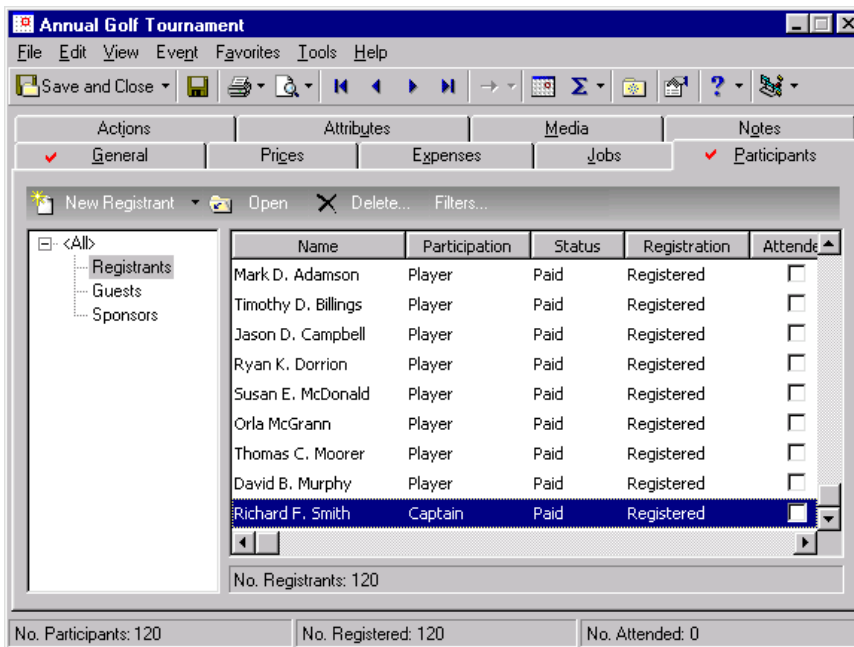
► Add guests to an event from a registrant record

You can add guests from the General tab of a registrant record.

Scenario: Your organization holds its annual golf tournament. Richard Frederick Smith, Sr., a registrant of the tournament, lets you know he plans to bring a guest, Albert Jackson Lucas. You need to add Albert as a guest. If you have not added the annual golf tournament event record, see “Add a sporting event” on page 20. If you have not added Richard as a registrant, see “Add registrants to an event” on page 125.

Warning: Guests are not required to be constituents in your database. To add a guest as a constituent, select **Add this participant as a constituent** from the **Participant** menu of the participant record.

1. From the Annual Golf Tournament event record, select the Participants tab. For information about how to open an event record, see “Open an event record” on page 10.
2. From the tree view on the left, select **Registrants**. Only registrants appear in the grid on the right.



Note: You can globally add guests, who are constituents in your database, to an event. For information, see the Globally Adding Guests to an Event section of the Globally Add Records chapter of the *Global Add, Delete, & Change Guide*.

3. Select Richard Smith's registrant record in the grid and click **Open** on the action bar above the grid. Richard's registrant record appears.

4. On the General tab, click **Guests**. Richard's Guest screen appears.

On the Guests screen, if Richard has invited additional guests, you can view a list of his guests in the grid. The total number of guests, total number registered, and the total number attended display on the bottom of the screen.

5. On the action bar of the Guests screen, click **New Guest**. A message appears to ask whether the participant is an individual or an organization.

6. Select **Individual**.

7. Click **OK**. The New Guest screen appears.

Warning: Never assume a participant is not in the database. We recommend you click the binoculars in the **Last name** field to search the database for the person to avoid duplicate entries. Perhaps a co-worker entered the constituent name differently, at an earlier time, without your knowledge.

8. If you clicked the binoculars, searched your database, and are sure the participant is not a constituent in your database, enter "Lucas" in the **Last name** field.
9. In the **First name** field, enter "Albert"; and in the **Middle name** field, enter "Jackson".
10. In the first **Titles** field, select "Mr."
11. Mark **Create a participant record for this guest** to create a record of this guest for your event. The **Total guests** field defaults to "1" and is disabled. If you do not mark this checkbox, you cannot seat the guest from the **Seating** button on the General tab of the event record or the General tab of the participant record.
12. Because you received Albert's registration form, in the **Registration** field, select "Registered". In the accompanying date field, enter the date you received the form.
13. After the event, open Albert Jackson Lucas's guest record and mark **This guest has attended**.

Warning: If you do not mark **Print Name Tags** and **Print Place Cards**, the participant cannot be included in the Name Tags or Place Cards mail tasks in *Mail*.

14. Mark **Print Name Tags**. Select "Albert Lucas" in the **Name to print** field. Mark **Editable?** to edit the name from this screen. Enter "1" in the **No. tags to print** field and select "Not Printed" in the **Status** field. For information about name tags, see "Set up name tags and place cards" on page 149. For information about name tags, see the *Mail Guide*.
15. Mark **Print Place Cards**. Select "Mr. Albert J. Lucas" in the **Name to print** field. Mark **Editable?** to edit the name from this screen. Enter "1" in the **No. cards to print** field and enter "Not Printed" in the **Status** field. For information about place cards, see "Set up name tags and place cards" on page 149. For information about place cards, see the *Mail Guide*.

16. On the toolbar of the New Guest screen, click **Save and Close**. You return to Richard's Guests screen and Albert Jackson Lucas appears in the Guests grid.

Name	Print Name Tags	No. Tags to Print	Print Place Cards	No. Cards to Print
Betsy P. Graack	<input checked="" type="checkbox"/>	1	<input checked="" type="checkbox"/>	1
Albert J. Lucas	<input checked="" type="checkbox"/>	1	<input checked="" type="checkbox"/>	1

Total number of guests: 2 Total number registered: 2 Total number attended: 0

17. On the action bar, click **Close**. You return to Richard's registrant record.
18. On the toolbar, click **Save and Close**. You return to the Annual Golf Tournament event record.
19. Click **Save and Close**.

► Convert a guest to a registrant

On occasion, you may need to change a guest record to a registrant record. You can quickly do so from the menu bar of the guest participant record.

1. From an event record, select the Participants tab. For information about how to open an event record, see "Open an event record" on page 10.
2. From the tree view on the left, select **Guests**. Only guests appear in the grid on the right.

Name	Participation	Status	Registration	Attended
Dianne D. Cone	Attendee	Paid	Registered	<input type="checkbox"/>
Bebe D. Kemp	Attendee	Paid	Registered	<input type="checkbox"/>
Clarice E. Riddle	Attendee	Paid	Registered	<input type="checkbox"/>
George D. Finley	Attendee	Paid	Registered	<input type="checkbox"/>

No. Guests: 4 Expected Guest attendance: 4

No. Participants: 16 No. Registered: 14 No. Attended: 0

3. Select a guest record in the grid and click **Open** on the action bar above the grid. The guest record appears.
4. From the menu bar, select **Participant, Convert to Registrant**.
5. The guest record becomes a registrant record. You can add information for the registrant. For information about how to add a registrant record, see "Add registrants to an event" on page 125.

Sponsors

Note: You can globally add sponsors, who are constituents in your database, to an event. For information, see the Globally Adding Sponsors to an Event section of the Globally Add Records chapter of the *Global Add, Delete, & Change Guide*.

A sponsor can be an individual or organization that sponsors, or represents, a registrant or a group of registrants. A sponsor may pay all the registration fees and the registrants may participate in the event as a group. Whatever role your event sponsors take, you add them from the Participants tab of an event record.

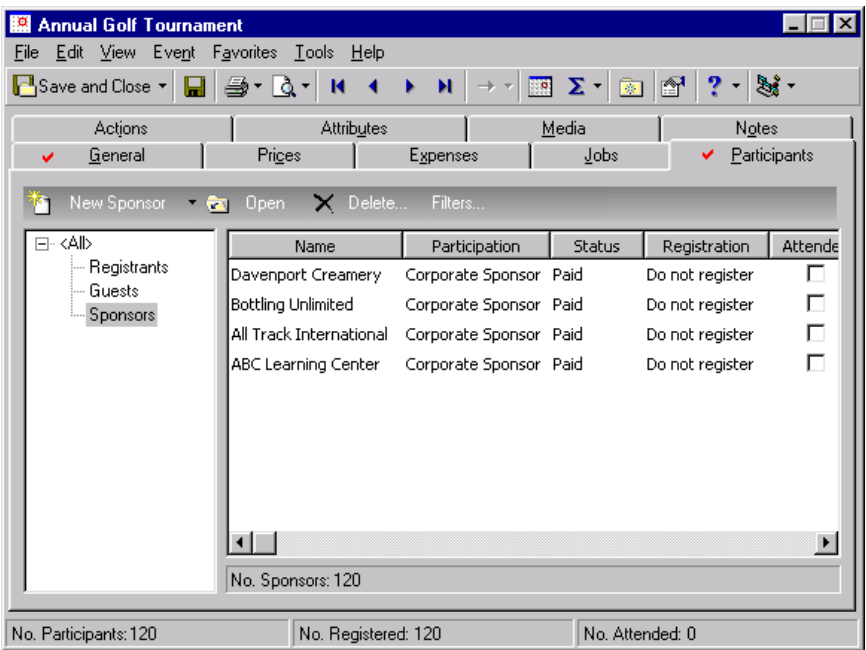
Once registrants are linked to a sponsor, you can calculate fees for the sponsor, their registrants, and guests at one time. For information about how to calculate fees, see “Registration Fees” on page 162.

► **Add sponsors to an event**

You add sponsors from the Participants tab of an event record.

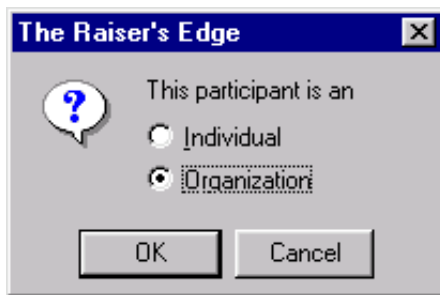
Scenario: Your organization holds its annual golf tournament. A representative from Dynamic Engineering calls to let you know the company wants to sponsor participants in the tournament. Add Dynamic Engineering as a sponsor. If you have not added the annual golf tournament event record, see “Add a sporting event” on page 20.

1. From the Annual Golf Tournament event record, select the Participants tab. For information about how to open an event record, see “Open an event record” on page 10.
2. From the tree view on the left, select **Sponsors**. Only sponsors appear in the grid on the right.



Warning: Sponsors are not required to be constituents in your database, but if you want to add a sponsor as a constituent, select **Add this participant as a constituent** from the **Participant** menu of the participant record.

- On the action bar above the tree view, click **New Sponsor**. A message appears to ask whether the participant is an individual or an organization.



- Mark **Organization**.
- Click **OK**. The Participant Biographical Information screen appears.

Phones/Email/Links		
DNC	Type	Number/Email Address
	Business	843-555-4356

- In the **Org name** field, click the binoculars. The Open screen for constituents appears so you can search your database for Dynamic Engineering to add as a sponsor. When found and selected, "Dynamic Engineering" appears automatically in the **Org name** field on the Participant Biographical Information screen. For more information about the Open screen, see the *Program Basics Guide*.

Note: When you change a participant address and save your changes, if the address is linked to other records, a message appears to inform you the address is shared and will also update on all the other records. To help you determine whether to change the address, you can view a list of records that share the address. Click **Show Shared Addresses**.

- Dynamic Engineering's address appears automatically in the Name fields because it defaults from the constituent record. To edit this address, click **More** to access the Address screen where you can do this. For information about how to add an address, see the *Program Basics Guide* or the *Constituent Data Entry Guide*.
- Dynamic Engineering's phone information appears automatically in the **Phones/Email/Links** grid because it defaults from the constituent record. If the business phone is already in the grid, you can add other types of phone numbers, fax numbers or email addresses. In the next empty row of the **Phones/Email/Links** grid, select a **Type** and enter the **Number/Email Address**.

9. On the toolbar, click **Save and Close**. The sponsor record appears.

Note: Seating setup for a participant is discussed in “Set Up Seating on the Participant Record” on page 151.

10. In the **Solicitor** field, click the binoculars to search for “David Murphy”. David is the solicitor who persuaded Dynamic Engineering to be a corporate sponsor of this tournament.
11. In the **Participation** field, select “Corporate Sponsor”.
12. In the **Status** field, select “Paid”. Dynamic Engineering sent a check to you for all the participants they sponsor.
13. In the **Invite?** field, select “Invited”. In the accompanying date field, enter the date you sent Dynamic Engineering an invitation.
14. In the **Response** field, select “Accepted”. A representative from Dynamic Engineering phoned to inform you they would like to sponsor participants in the tournament. In the accompanying date field, enter the date they accepted.
15. In the **Registration** field, select “Do not register”. Each participant registers individually. You do not have to enter a date in the accompanying field.
16. In the **Contact** field, select “Raymond Savage”. The **Contact** field appears only if a participant is an organization. Contacts must appear on Dynamic Engineering’s Relationships tab and must be designated as a contact for the organization on the relationship record. For information about relationships, see the *Constituent Data Entry Guide*.
17. After the tournament, open the sponsor record and mark **Participant has attended**.
18. After you add information about the General 1 tab of the sponsor record, click **Save and Close** on the toolbar. You return to the Participants tab of the Annual Golf Tournament event record.
19. Click **Save and Close**.

More Sporting Information

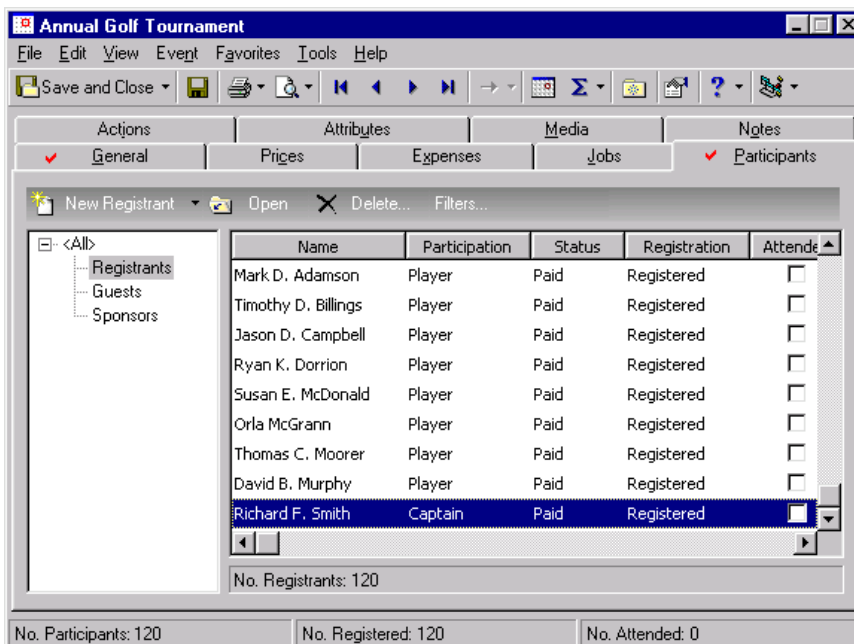
When you plan a sporting event, to track detailed sporting information for each participant, you can click **More Info** on the General tab of the registrant, guest, or sponsor record. This is information you assign to a participant and information you gather personally from a participant. Perhaps, you gather additional sporting information from your registration forms. From the **More Info** button, you can track information such as the number you assign to a participant; the gender, age, height, and weight; the ability rating, which is a handicap if your event is a golf tournament; the start time and place; and the event location. You can also track team information such as the division, team name, and position.

► Add sporting information for a sporting event participant

You can add sporting information from the **More Info** button on the General tab of the registrant, guest, or sponsor record of a sporting event.

Scenario: Your organization holds its annual golf tournament. Richard Frederick Smith, Sr. registered for the tournament, and you added a registrant record for Richard. Add additional sporting information on Richard's registrant record. If you have not added the annual golf tournament event record, see "Add a sporting event" on page 20. If you have not added Richard as a registrant, see "Add registrants to an event" on page 125.

1. From the Annual Golf Tournament event record, select the Participants tab. For information about how to open an event record, see "Open an event record" on page 10.
2. From the tree view on the left, select **Registrants**. Only registrants appear in the grid on the right.



3. Select Richard Smith's registrant record in the grid and click **Open** on the action bar above the grid. Richard's registrant record appears.

4. Select the General tab.

Note: If the participant is a constituent in your database, the **Gender** and **Age** appear automatically on the Sport Information screen. They default from the constituent record.

5. Click **More Info**. The Sport Information screen appears.

6. In the **Assigned number** field, enter "15".
7. In the **Gender** field, select "Male".
8. In the **Age** field, enter "25".
9. In the **Height** field, enter "6' " and in the **Weight** field, enter "180".
10. In the **Ability rating** field, enter "10".
11. In the **Start time** field, enter "8:00 AM" and in the **Place** field, enter "First tee".

12. In the **Location** field, enter “Fairfield Country Club”. You may possibly have more than one location for a sporting event. If this is the case, you can select from a list you create.
13. In the **Team Information** frame, enter “First” in the **Division** field, “2” in the **Team** field, and “Captain” in the **Position** field. For a sporting event, you will most likely have more than one **Division**, **Team**, and **Position**. If this is the case, you can select from a list you create.
14. Click **OK**. You return to the General tab of Richard’s registrant record.
15. To save and close the registrant record, click **Save and Close** on the toolbar. You return to the Annual Golf Tournament event record.
16. Click **Save and Close**.

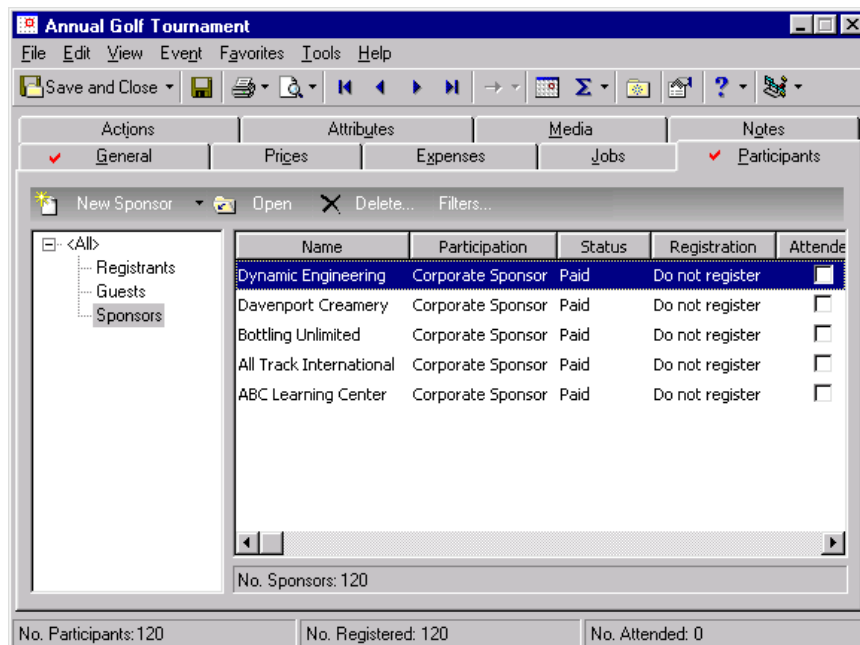
Sponsorship Lists

A sponsorship list is a list of registrants sponsored by an individual or organization.

► View sponsorship lists

You can view a list of registrants sponsored by an individual or organization on the General tab of the sponsor record.

1. From an event record, select the Participants tab. For information about how to open an event record, see “Open an event record” on page 10.
2. From the tree view on the left, select **Sponsors**. Only sponsors appear in the grid on the right. If you have not added any sponsors, see “Add sponsors to an event” on page 138.



3. In the grid, select the sponsor for whom to view a sponsorship list and click **Open** on the action bar above the grid. The participant (sponsor) record appears.

4. Select the General tab.

Note: On the Participants Sponsored by screen, to search for a name in the list, click **Find**. To print the Sponsorship list, click **Print**. If you click **Legend**, you can select colors for the different types of participants, decide whether the participant type should appear bold or in italics, and you have the option to add a suffix to a participant type. For information about legends, see the *Program Basics Guide*.

5. Click **Sponsorship List**. The Participants Sponsored by screen appears.

To view any guests of the registrants listed on the Sponsored by screen, mark **Include guests of participants listed** and click **Expand All**. The guests appear under the appropriate registrants.

6. On the Participants Sponsored by screen, click **Close**. You return to the General tab of the participant (sponsor) record.
7. On the toolbar, click **Save and Close**. You return to the event record.
8. Click **Save and Close**.

Dinner Preferences

Note: From *Reports*, you can run a Dinner Preferences Report that shows your participants' dinner preferences, quantity, and comments. For information, see the *Reports Guide*.

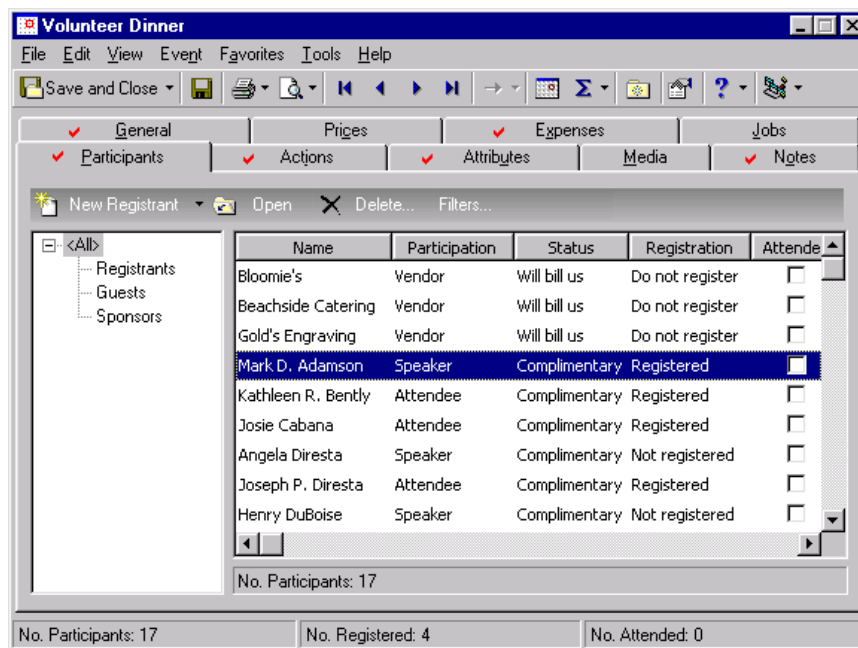
When you set up a dinner event, to plan your menu entrees and add the menu items, select **Event, Menu** from the toolbar of the event record. For information about adding menu items, see "Dinner Menu Items" on page 102.

From each participant (registrant, guest, or sponsor) record, you can select the participant's dinner preferences from the menu items you set up previously. You can gather the participant dinner preference information by talking personally to each participant, or you can give each participant a selection of choices on the registration form.

► Designate participant dinner preferences

To designate a participant's dinner preferences, click **More Info** on the General tab of the registrant, guest, or sponsor record of a dinner event.

1. From a dinner event record, select the Participants tab. For information about how to open an event record, see "Open an event record" on page 10.
2. From the tree view on the left, select **Registrants, Guests, or Sponsors**. The type of participant you select determines what appears in the grid on the right.



3. In the grid, select the registrant, guest, or sponsor for whom you want to designate dinner preferences and click **Open** on the action bar above the grid. The participant record appears.

4. Select the General tab.

The screenshot shows a software window titled "Mark D. Adamson (Registrant)". It has a menu bar with "File", "Edit", "View", "Participant", and "Tools". Below the menu bar is a toolbar with icons for "Save and Close", "Print", "Find", "Previous", "Next", "Home", "Help", and "Exit". The main area has a tabbed interface with tabs for "General", "Travel", "Registration Fees", "Participation", "Donations", and "Attributes/Notes". The "General" tab is selected. On the left, there is a "Registered Events" list with "Volunteer Dinner" and "Volunteer Luncheon". The "General" tab contains several fields: "Solicitor" (Anne C. Sinclair), "Invite?" (Invited), "Response" (Accepted), "Status" (Complimentary), "Registration" (Registered), "Seating" (Seating), "Seating Group" (Adamson Party), "Group/seating notes" (Mark is bringing three guests: Alex And), "Sponsored by:", "Participant has attended", and "Participant is a coordinator". At the bottom, there are buttons for "More Info...", "Awards", "Tags/Cards", "Guests", and "Dinner".

Note: If an entry does not exist in a drop-down list in a field where you must make a selection, you can always type your entry in the field if you have security rights established. A message appears to ask whether to add the entry to that table. Select **Yes**. Even though you can add a table entry from a field with a drop-down list, for data entry consistency, we recommend you establish your table entries from the **Tables** link of *Configuration*. For information about how to set up tables, see the *Configuration & Security Guide*.

5. Click **More Info**. The Dinner Preferences screen appears.

The screenshot shows a window titled "Dinner Preferences for Mark D. Adamson". It contains a message: "Use the grid to specify dinner preferences for this participant." Below the message is a table with three columns: "Dinner Preference", "Quantity", and "Comments". The table has one row with the following data: "Pasta Primavera", "1", and "Vegetarian". Below the table is a large empty text area. At the bottom, there are "OK" and "Cancel" buttons.

Dinner Preference	Quantity	Comments
Pasta Primavera	1	Vegetarian

6. In the **Dinner Preference** column, select the participant's dinner preference.
7. In the **Quantity** column, enter the number of dinners the participant requested.
8. In the **Comments** column, enter any comments concerning the participant's menu request.
9. Click **OK**. You return to the General 1 tab of the participant record.
10. On the toolbar, click **Save and Close**. You return to the event record.
11. Click **Save and Close**.

Participant Awards

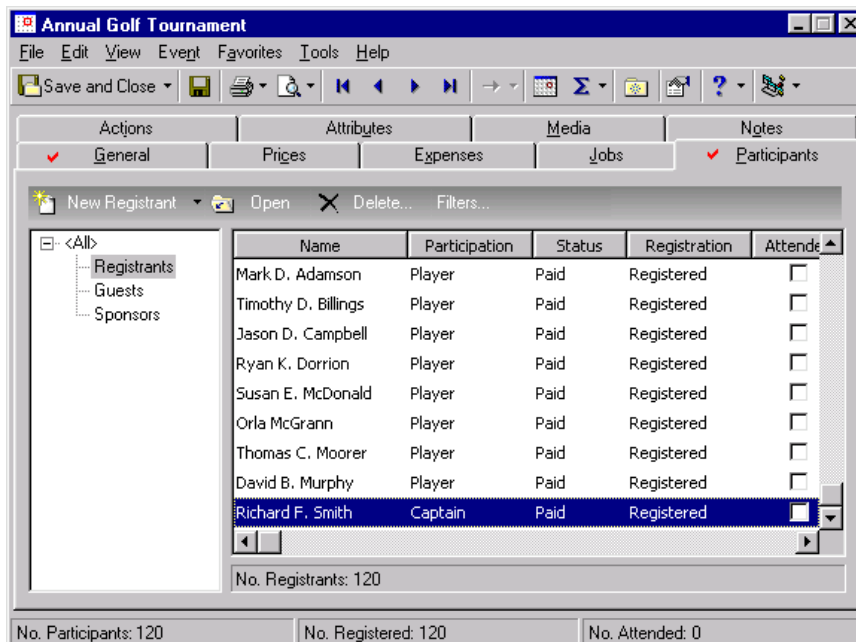
When you plan an event, to set up the awards to present at the event, select **Event, Awards** from the toolbar of the event record. For information about how to set up event awards, see “Event Awards” on page 103.

From each participant (registrant, guest, or sponsor) record, you can select the award(s) previously set up for the event to be given to that participant. You select these awards from the **Awards** button on the General tab.

► Designate awards given to a participant

To track the awards given to a participant, click **Awards** on the General tab of the registrant, guest, or sponsor record of any event.

1. From an event record, select the Participants tab. For information about how to open an event record, see “Open an event record” on page 10.
2. From the tree view on the left, select **Registrants, Guests, or Sponsors**. The type of participant you select determines what appears in the grid on the right.



3. In the grid, select the registrant, guest, or sponsor for whom to designate awards and click **Open** on the action bar above the grid. The participant record appears

4. Select the General tab.

Richard F. Smith (Registrant)

File Edit View Participant Tools Help

Save and Close

Registrant: Richard F. Smith

Registered Events:
Summer Series of Fun
Alta Tennis Tournament
Afternoon Tea
Starlight Concert
Annual Golf Tourna...

General Travel Registration Fees Participation Donations Sponsoring Pledges Attributes/Notes

Solicitor: David B. Murphy Invite?: Invited 05/15/2006
Participation: Captain Response: Accepted 06/01/2006
Status: Paid Registration: Registered 06/01/2006

Seating
Seating Group: Seat: Not yet assigned
☐ Do not seat this Participant Group/seating notes:

Sponsored by: Bottling Unlimited
☐ Participant has attended
☒ Participant is a coordinator

More Info... Awards Tags/Cards Guest

Sporting Event

Note: To add a new award in the **Award** column, type the award rather than select it from the drop-down list. If you opt to add a new award on the Award presented to screen, the award also appears on the Awards screen that appears when you select **Event, Awards** on the toolbar of the event record itself. You use this screen when you originally set up your awards. For information about how to set up awards for an event, see “Set up awards for an event” on page 103.

5. Click **Awards**. The Awards presented to screen appears.

Awards presented to Richard F. Smith

Enter the awards presented to this participant at this event.

Award	Presented By	Comments
\$100 gift certificate	Lamar Smith, President	Sporting Shoppe

OK Cancel

6. In the **Award** column, select the award presented to the participant.
7. In the **Presented By** column, enter the person handing out the award.
8. Enter any **Comments** about the award such as who donated the prizes or what position wins what prize — first, second, third, or runner up.
9. Click **OK**. You return to General 1 tab of the participant record.
10. On the toolbar, click **Save and Close**. You return to the event record.
11. Click **Save and Close**.

Name Tags and Place Cards

Note: After you set up your name tags and place cards, to print them at any time, select **File, Print** from the menu bar of the registrant, guest, or sponsor record and select **Name Tags** or **Place Cards**.

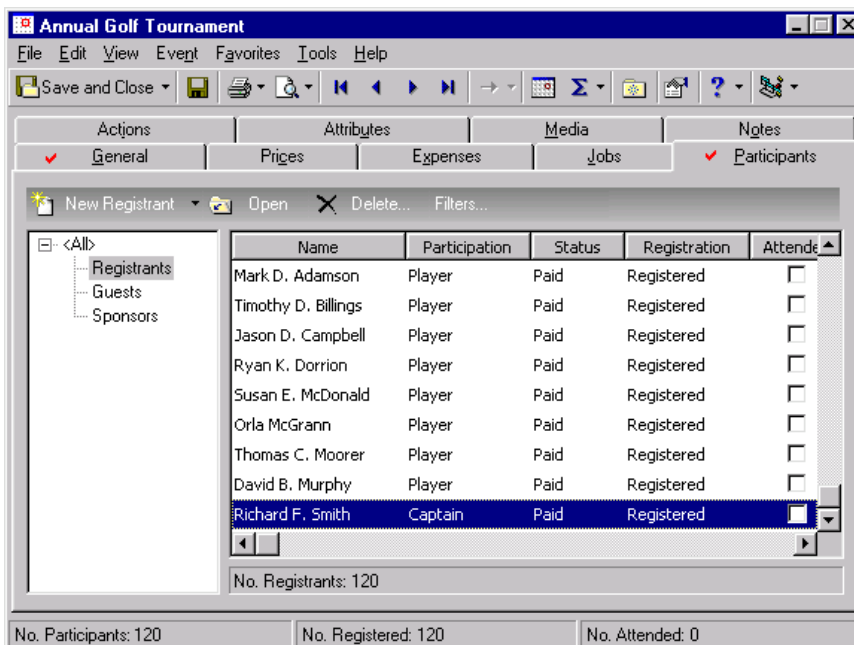
After you add registrants, guests, and sponsors to an event, you can set up name tags and place cards for each participant from the registrant, guest, or sponsor record. To print these tags at any time, select **File, Print** from the menu bar of the registrant, guest, or sponsor record and select **Name Tags** or **Place Cards**.

► Set up name tags and place cards

You set up tags and cards for each participant from the General tab of the registrant, guest, or sponsor record.

Scenario: Your organization holds its annual golf tournament. Richard Frederick Smith, Sr. sent his registration form, and you added Richard as a registrant of the event. Now, set up a name tag for him to wear at the tournament and a place card for his seat at the party after the tournament. If you have not added the annual golf tournament event record, see “Add a sporting event” on page 20. If you have not added Richard as a registrant, see “Add registrants to an event” on page 125.

1. From the Annual Golf Tournament event record, select the Participants tab. For information about how to open an event record, see “Open an event record” on page 10.
2. From the tree view on the left, select **Registrants**. Only registrants appear in the grid on the right.



3. Select Richard Smith's registrant record in the grid and click **Open** on the action bar above the grid. Richard's registrant record appears.

4. Select the General tab.

Note: If a participant is a constituent in your database, not only can you enter a name in the **Name to print** field, you can also choose from a list in the **Name to print** field. This list includes the addressees and salutations set up on the Addresses/Salutations tab of the constituent record and all the ones defined in *Configuration*. For information about the Addressees/Salutations tab, see the *Constituent Data Entry Guide*. For information about how to define addressees and salutations, see the *Configuration & Security Guide*.

5. Click **Tags/Cards**. The Name Tags/Place Cards screen appears.

6. To ensure a name tag is printed and to enable the name tag fields, mark **Print Name Tags**.
If you do not mark this checkbox, you cannot include the participant in the Name Tags mail task in *Mail*. For information about how to print name tags, see the *Mail Guide*.
7. In the **Name to print** field, select "Richard". Mark **Editable?** so you can edit the name from this screen.
8. In the **No. tags to print** field, enter "1".
9. In the **Status** field, select "Not Printed". You have not yet printed name tags for the golf tournament.

10. To ensure a place card is printed and to enable the accompanying fields, mark **Print Place Cards**.

Note: When you print your name tags and place cards, the program can update the **Status** field to “Printed”. For information about how to automatically update the **Status** field, see the *Mail Guide*.

If you do not mark this checkbox, you cannot include the participant in the Place Cards mail task in *Mail*. For information about how to print place cards, see the *Mail Guide*.

11. In the **Name to print** field, select “Mr. Richard F. Smith”. Mark **Editable?** so you can edit the name from this screen.
12. In the **No. cards to print** field, enter “1”.
13. In the **Status** field, select “Not Printed”. You have not yet printed place cards for the golf tournament.
14. Click **OK**. You return to Richard’s registrant record.
15. On the toolbar, click **Save and Close**. You return to the Annual Golf Tournament event record.
16. Click **Save and Close**.

Set Up Seating on the Participant Record

Note: To set up seating arrangements from a participant record, you can also select **Participant, Seating for this event** from the menu bar.

On the General tab of a participant record, if you have not set up your seating arrangements from the General tab of the event record, you can click **Seating** to access the Seating Setup Wizard to do so. After you set up your seating arrangements, at any time, you can click **Seating** on the General tab to access the Seating screen. From the Seating screen, you can assign the participant from the **Participants** frame to a seat in the **Seats** frame. When you need to add the participant from the **Participants** frame to a group in the **Groups** frame and assign the group to seats in the **Seats** frame, you can do that on the Seating screen, as well. For detailed information about the Seating Setup Wizard, the Seating screen, and procedures to assign participants to seats, add participants to groups, and assign groups to seats, see “Event Seating” on page 39.

Note: A status bar on the bottom of the Participants tab displays the number of participants and expected participant attendance (total participants minus the participants who have **Do not seat this Participant** marked).

When a participant does not require a seat, you should mark **Do not seat this Participant**. When you mark **Do not seat this Participant**, the participant does not appear under **Participants** on the Seating screen so you do not accidentally assign the participant to a seat. Also, the participant does not appear in seating totals or on seating reports. Once you assign a participant to a seat, the **Do not seat this Participant** checkbox becomes disabled.

In the **Seating Group** field, you can quickly select or create a group to which to add the participant. To help you focus on adding the participant to a group, you can click **Groups** in the **Seating Group** field to access a special Seating screen. On this screen, only the **Participants** and **Groups** frames appear. Using the two frames, you can create a new group, add the participant to the new group or one you created earlier, and organize your groups. At times, you may need to add a participant to a group early in the registration period, in advance of knowing the layout of your event venue. With the **Seating Group** field and **Groups** button, you can add the participant to a group before you run the Seating Setup Wizard to set up your seating arrangements. When you do this, the Seating Setup Wizard does not appear the first time you click **Seating**. The regular Seating screen appears. Once you know the layout of your venue, you can click **Setup** in the **Seats** frame of the Seating screen at any time to access the wizard.

Tip: On the action bar of the **Groups** frame on the Seating screen, a **Show Notes** checkbox appears. When you mark this checkbox, any notes you add in the **Group/seating notes** field on the General 2 tab appear beside a participant’s name in the **Groups** frame. These notes help you determine how to group participants and where to seat them in the **Seats** frame.

In the **Group/seating notes** field, you can enter helpful notes to remember about the participant's group and seating requests. When a participant calls and asks to sit with a particular party, you can note that here: "Mark requests to sit with the John Smith party." On a registration card, when a participant enters special seating instructions, you can note that here, as well: "Mark requests to sit in non-smoking. He also needs to sit close to an exit." These group and seating notes help to ensure your participants sit where they want and with the group they want. You can adhere to their seating requests.

The screenshot shows a software window titled "Mark D. Adamson (Registrant)". The menu bar includes File, Edit, View, Participant, Tools, and Help. Below the menu is a toolbar with icons for Save and Close, Print, Find, and navigation arrows. The main area has a "Registrant:" field with "Mark D. Adamson" and a dropdown arrow. On the left, a "Registered Events" list shows "Volunteer Dinner" (checked) and "Volunteer Luncheon". The main panel has tabs: General (checked), Travel, Registration Fees, Participation (checked), Donations, and Attributes/Notes. The Participation tab contains fields for Solicitor (Anne C. Sinclair), Invite? (Invited, 10/15/2008), Participation (Speaker), Response (Accepted, 10/15/2008), Status (Complimentary), and Registration (Registered, 10/15/2008). Below these is a "Seating" section with a "Seating" button, "Seat: 1 - Left Section\1 - Table 1\1 - Seat", "Seating Group: Adamson Party", a checkbox for "Do not seat this Participant", and a "Group/seating notes" field containing "Mark is bringing three guests: Alex And". At the bottom of the Participation tab are checkboxes for "Participant has attended" and "Participant is a coordinator". At the very bottom of the window are buttons for "More Info...", "Awards", "Tags/Cards", "Guests", and a red "Dinner" button.

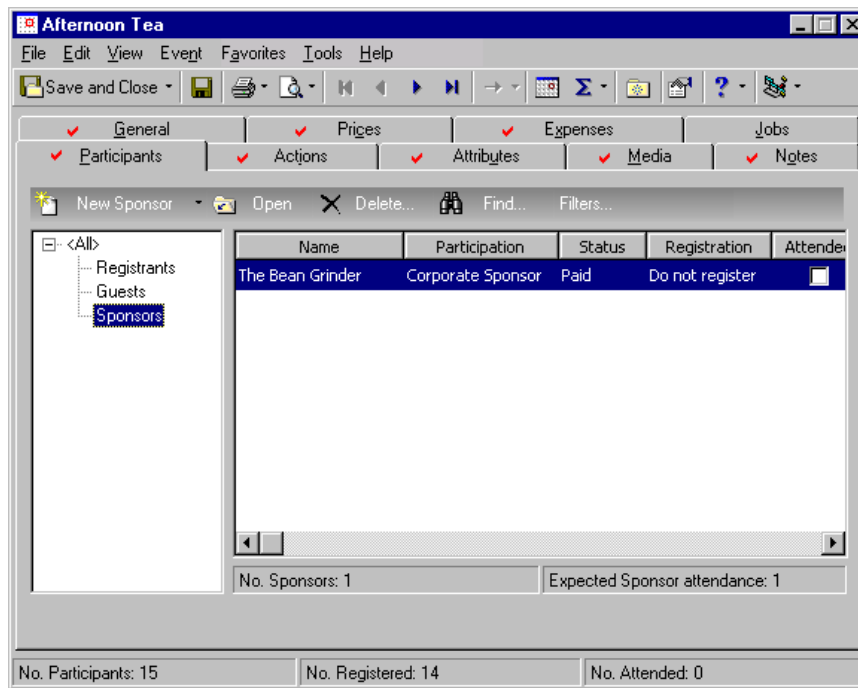
► **Make sure a participant is not assigned to a seat**

Note: For information about how to add registrants, guests, and sponsors to an event record, see "Add registrants to an event" on page 125, "Add guests to an event from the Participants tab" on page 131, "Add guests to an event from a registrant record" on page 134, and "Add sponsors to an event" on page 138.

You may have participants come to an event who never need to be assigned to a seat. For example, a catering company attends your event. You added this vendor as a registrant and you designated them as a vendor on the Participation tab of their participant record. Even though they attend the event, you do not need to seat them. Another example is a corporate sponsor who sponsors participants at an event. While you need to assign each of the sponsored participants (registrants) to seats at the event, you do not need to seat the sponsor.

1. From an event record, select the Participants tab. For information about how to open an event record, see "Open an event record" on page 10.

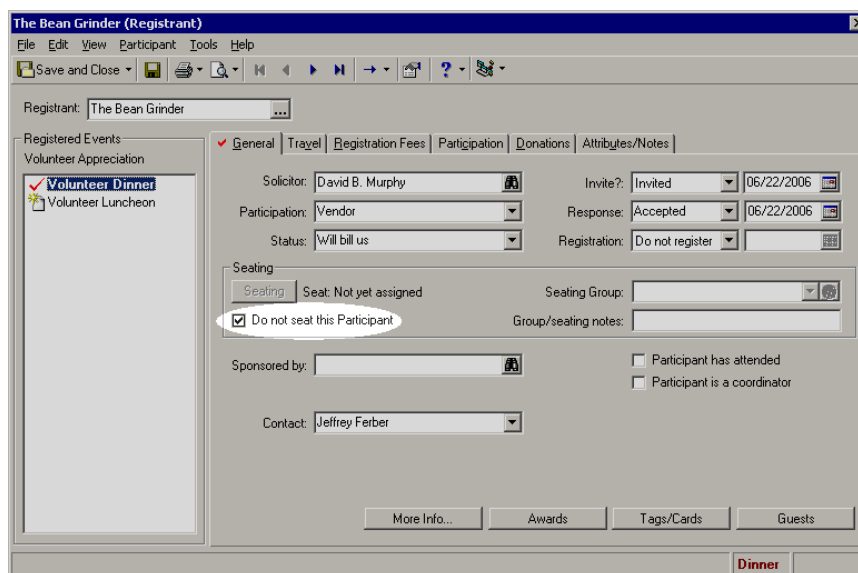
- From the tree view on the left, select **Registrants**, **Guests**, or **Sponsors**. The type of participant selected determines what appears in the grid on the right.



- In the grid, select the registrant, guest, or sponsor who does not need to be assigned to a seat and click **Open** on the action bar above the grid. The participant record appears.
- Select the General tab.

Note: Once you assign a participant to a seat, the **Do not seat this Participant** checkbox becomes disabled.

- Mark **Do not seat this Participant**. Now, the participant does not appear under **Participants** on the Seating screen so you do not accidentally assign the participant to a seat or to a group. Also, the participant does not appear in seating totals or on seating reports.



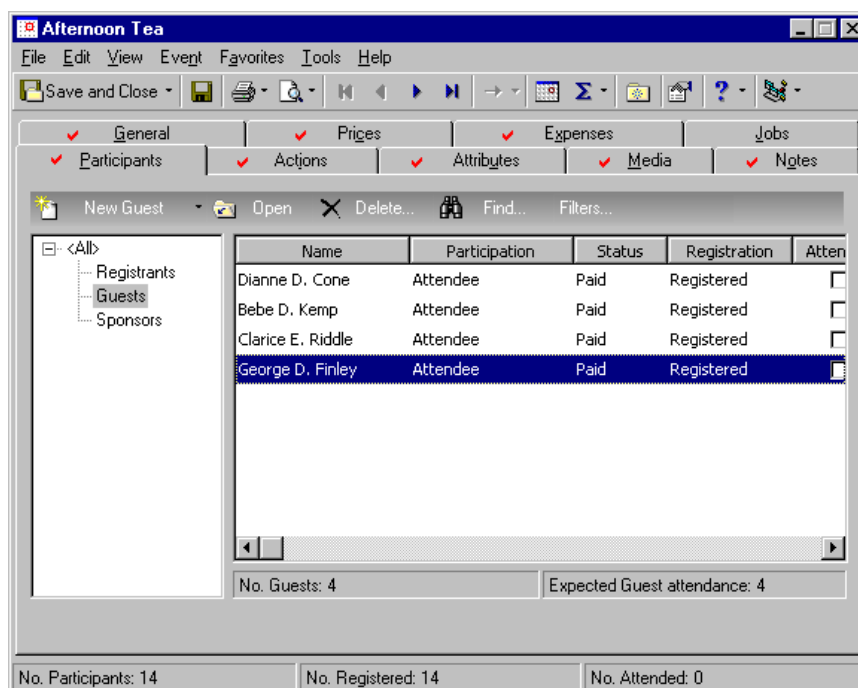
- On the toolbar, click **Save and Close**. You return to the event record.

7. Click **Save and Close**.► **Add group and seating notes for a participant**

Tip: On a registration card, a participant may ask to sit with a certain group or make other seating requests, such as near the front of the room or by an exit, for example. Once you enter these notes on a participant record, you can file the registration card away, and never have to access it again.

In the **Group/seating notes** field, you can enter notes to remember about a participant's group or seating requests. For example, when two participants ask to sit together, enter this on each of their participant records. When a participant requests to sit in an area such as outside or inside, add that sort of information. Participants may also have physical limitations that require you to seat them cautiously; a participant may be hard of hearing and need to sit close to a stage or speaker. These notes help you assign participants from the **Participants** frame of the Seating screen to an appropriate group under **Groups**, and then to correct seats under **Seats**. They also help you correctly assign individual participants from the **Participants** frame to seats in the **Seats** frame.

1. From an event record, select the **Participants** tab. For information about how to open an event record, see "Open an event record" on page 10.
2. From the tree view on the left, select **Registrants**, **Guests**, or **Sponsors**. The type of participant selected determines what appears in the grid on the right.



3. In the grid, select the registrant, guest, or sponsor for whom to add group or seating notes and click **Open** on the action bar above the grid. The participant record appears.
4. Select the **General** tab.

Tip: On the action bar of the **Groups** frame on the Seating screen, a **Show Notes** checkbox appears. When you mark this checkbox, any notes you add in the **Group/seating notes** field on the **General** tab appear beside a participant's name under **Groups**. These notes help you determine how to group participants and where to seat them in the **Seats** frame.

5. In the **Group/seating notes** field, enter relevant notes that can help you assign this participant to the appropriate group or seat, such as “Requests to sit with Lucy Avdeenko’s party; requests to sit close to a rest room.”

6. After you add your notes, click **Save and Close** on the toolbar. You return to the event record.
7. Click **Save and Close**.

► Add a participant to a group from the General tab

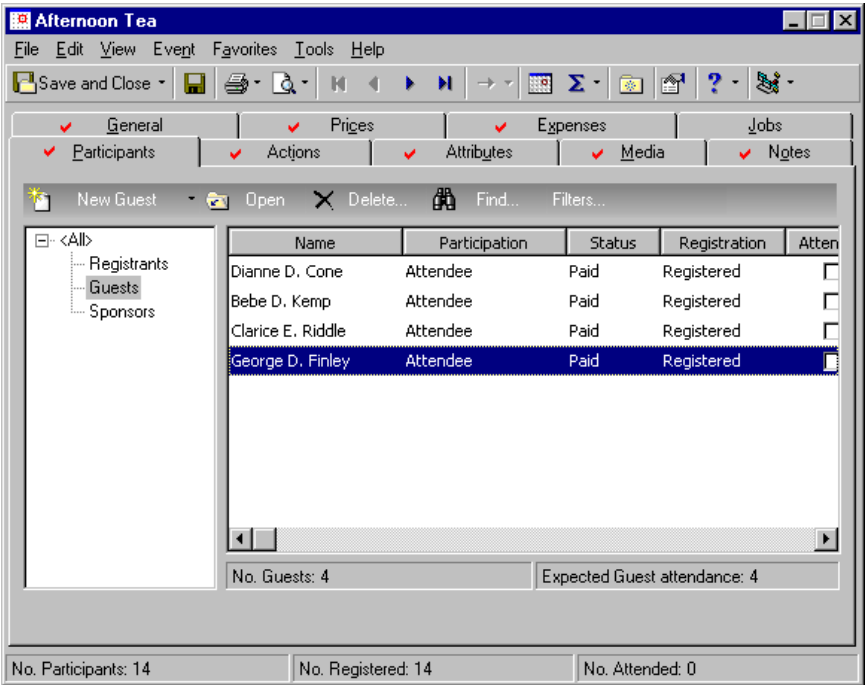
Tip: At times, you may need to add a participant to a group early in the registration period in advance of knowing the layout of your event venue. With the **Seating Group** field and **Groups** button, you can add the participant to a group before you use the Seating Setup Wizard to set up your seating arrangements. When you do this, the Seating Setup Wizard does not appear the first time you click **Seating**. The Seating screen appears. Once you know the layout of your venue, click **Setup** under **Seats** on the Seating screen to access the wizard.

As participants register for an event, they may ask to sit with other participants. As you add registrants, guests, or sponsors from the Participants tab of the event record, you may decide to go ahead and add each participant who made special seating requests to an appropriate group at this time. This way, when you start to assign participants and groups to seats, you can respect their seating wishes. For detailed information about the Seating Setup Wizard, the Seating screen, and procedures to assign participants to seats, add participants to groups, and assign groups to seats, see “Event Seating” on page 39.

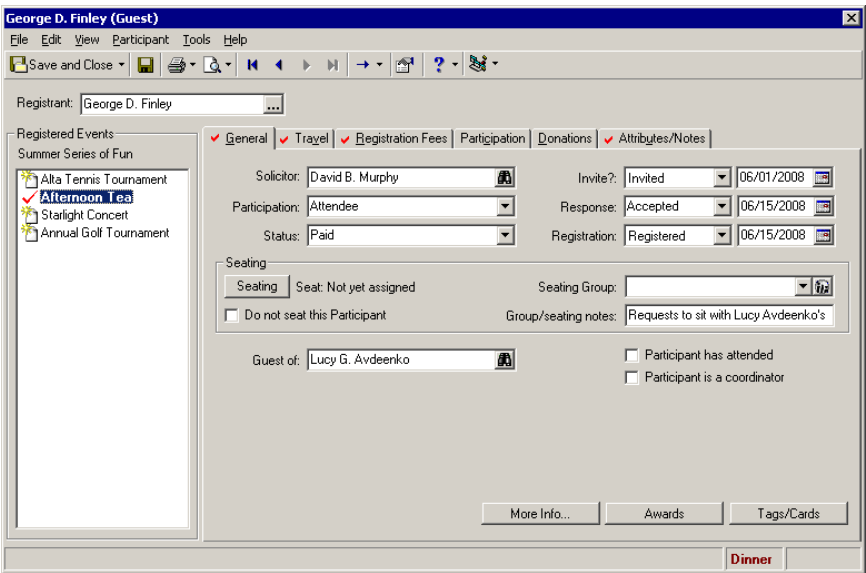
Scenario: You hold an Afternoon Tea event. George Finley attends the event as a guest of Lucy Avdeenko. On the Participants tab of the event record, you add George as her guest. When George registers for the event, he requests to sit with Lucy’s party. When Lucy registers for the event and specifies she plans to bring guests, you created the Lucy Avdeenko Party group on the Seating screen. To ensure George sits with Lucy’s party, on the General tab of his participant record, add him to the Lucy Avdeenko Party group. For information about the Seating screen, see “Introduction to the Seating Screen” on page 58. For information about how to add a group and assign a participant to a group, see “Create a group and adding participants to the group” on page 88.

1. From the Afternoon Tea event record, select the Participants tab. For information about how to open an event record, see “Open an event record” on page 10.

2. From the tree view on the left, select **Guests**. Only guests appear in the grid on the right.



3. Select George Finley's guest record and click **Open** on the action bar above the grid. The participant record appears.
4. Select the General tab.



5. In the **Group/seating notes** field, review the group and seating notes previously added to George's participant record when he first registered for the event. You see he requests to sit with Lucy Avdeenko's party. For information about group and seating notes, see "Add group and seating notes for a participant" on page 154.

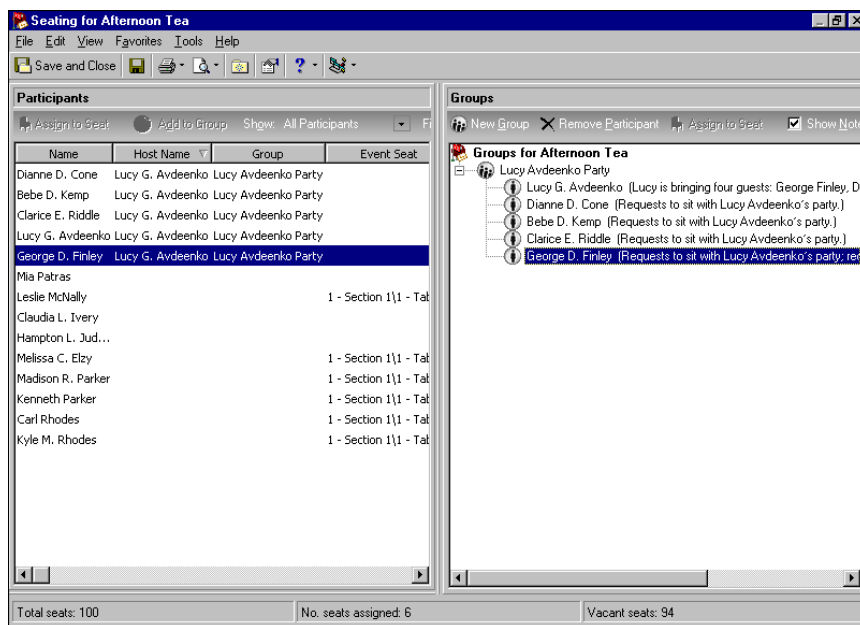
Tip: In the **Seating Group** field, you can add a group “on the fly”. You can enter a group name directly into the **Seating Group** field. Once you enter a group name, the group appears in the **Groups** frame on the Seating screen.

6. In the **Seating Group** field, select “Lucy Avdeenko Party”. When Lucy registers for this event and informs you that she plans to bring guests to the event, on the Seating screen, under **Groups**, you add the Lucy Avdeenko Party. Because you added the Lucy Avdeenko Party group, it appears in the list in the **Seating Group** field.

The screenshot shows a software window titled "George D. Finley (Guest)". The interface includes a menu bar (File, Edit, View, Participant, Tools, Help) and a toolbar with icons for saving, printing, and navigation. A "Registrant" field contains "George D. Finley". Below this is a "Registered Events" list with items like "Alta Tennis Tournament", "Afternoon Tea", "Starlight Concert", and "Annual Golf Tournament". The main area has tabs for General, Travel, Registration Fees, Participation, Donations, and Attributes/Notes. The "General" tab is active, showing fields for Solicitor (David B. Murphy), Participation (Attendee), Status (Paid), Invite? (Invited), Response (Accepted), and Registration (Registered). A "Seating" section contains a "Seating Group" dropdown menu currently set to "Lucy Avdeenko Party", a "Do not seat this Participant" checkbox, and a "Group/seating notes" field with the text "Requests to sit with Lucy Avdeenko's". At the bottom, there are buttons for "More Info...", "Awards", and "Tags/Cards", and a "Dinner" button.

Tip: If you have not already created a group to which to add the participant, click **New Group** on the action bar of the **Groups** frame. Once you add and name a group, the group appears in the tree view of the **Groups** frame. You can add the participant and any other participants under **Participants** to the group. For information about how to add a group and add participants to a group, see “Create a group and adding participants to the group” on page 88.

7. In the **Seating Group** field, click **Groups**. A special Seating screen appears. On this Seating screen, only the **Participants** and **Groups** frames appear. Because you selected the Lucy Avdeenko Party in the **Seating Group** field, George now appears under the Lucy Avdeenko Party under **Groups**. If you mark **Show Notes** on the action bar, the group and seating notes added in the **Group/seating notes** field appear beside his name. Also, under **Participants**, the Lucy Avdeenko Party appears beside his name in the **Group** column. For information about how to manage seating on the Seating screen, see “Introduction to the Seating Screen” on page 58. For information about how to add a group to the Seating screen, see “Create a group and adding participants to the group” on page 88.



8. While you have the Seating screen open, you can add other groups, organize your groups, and add and remove participants from these groups. Once you finish your grouping tasks, click **Save and Close** on the toolbar. You return to the General tab of the participant record.
9. On the toolbar, click **Save and Close**.

Lodging and Travel Information

When you host an event, you may have participants who travel to and from your event by airplane or train. Participants may also need to stay in hotels, motels, or other lodging facilities. You can track your participants' lodging arrangements and travel itineraries on the Travel tab of their registrant, guest, or sponsor records.

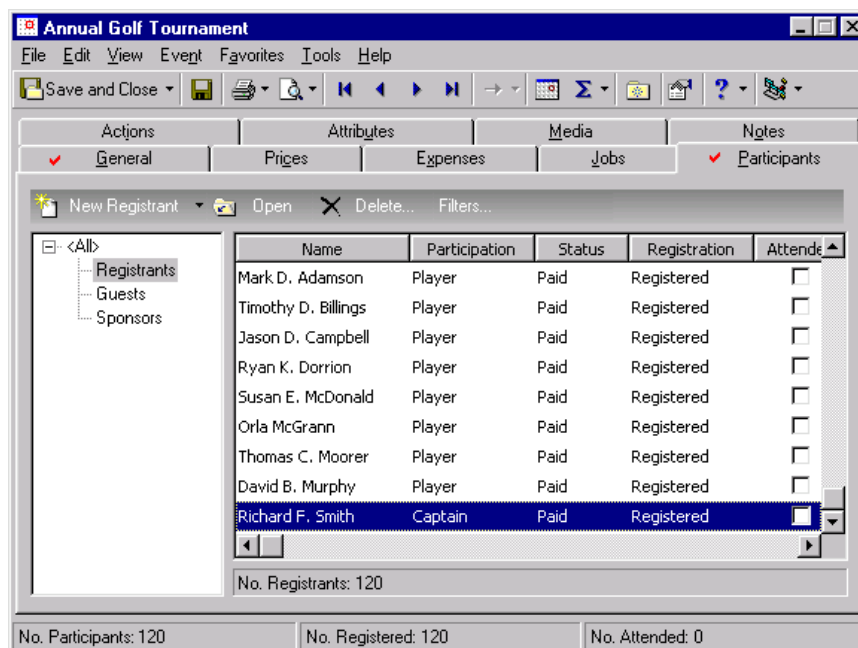
► Add lodging information

Note: From *Reports*, you can run a Lodging Information report to provides information about where your participants stay during an event. This report includes information such as the lodging name, room number, and check-in date For information, see the *Reports Guide*.

On the Travel tab of the participant record, you can track lodging information for a registrant, guest, or sponsor.

Scenario: Your organization holds its annual golf tournament. You book hotel rooms for out-of-town participants. You booked a hotel room for Richard Frederick Smith, Sr., a registrant of your tournament. Now, track the lodging information on his registrant record. If you have not added the annual golf tournament event record, see “Add a sporting event” on page 20. If you have not added Richard as a registrant, see “Add registrants to an event” on page 125.

1. From the Annual Golf Tournament event record, select the Participants tab. For information about how to open an event record, see “Open an event record” on page 10.
2. From the tree view on the left, select **Registrants**. Only registrants appear in the grid on the right.



3. Select Richard Smith’s registrant record in the grid and click **Open** on the action bar above the grid. Richard’s registrant record appears.

4. Select the Travel tab.

Richard F. Smith (Registrant)

File Edit View Participant Tools Help

Save and Close

Registrant: Richard F. Smith

Registered Events: Summer Series of Fun

- Alta Tennis Tournament
- Afternoon Tea
- Starlight Concert
- Annual Golf Tourna...**

General **Travel** Registration Fees Participation Donations Sponsoring Pledges Attributes/Notes

Lodging

Name: Hilton Hotel Confirmation no.: RFS224

Room no.: 224 Check Availability Check-in date/time: 07/21/2006 2:00 PM

Phone no.: 843-555-4321 Check-out date/time: 07/24/2006 12:00 PM

Travel

Arrival

Type: Name: Number: Date: Time:

Departure

Type: Name: Number: Date: Time:

Sporting Event

- Under **Lodging**, select "Hilton Hotel" in the **Name** field. This is the hotel where Richard will stay.
- In the **Room no.** field, enter "224".
- To see if the room is assigned to anyone else, click **Check Availability**.

The Raiser's Edge

Name: Hilton Hotel

Room no.: 224

This room is currently assigned to 0 participants.

Participant Name	Participation	Status
------------------	---------------	--------

OK

Because no other participants are assigned to this room, a message appears stating "This room is currently assigned to 0 participants." If this room was assigned to another participant, the message reflects the number of participants assigned. The names of the assigned participants, their participation, and status appear in the grid. After you check availability, click **OK**. You return to the Travel tab of Richard's registrant record.

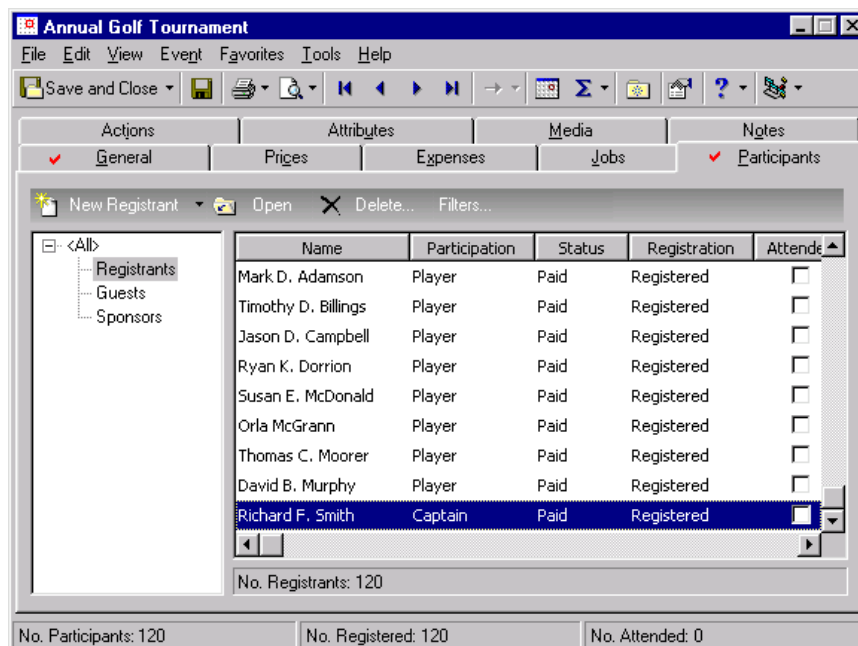
- In the **Phone no.** field, enter the phone number 843-555-4321. This is the hotel's phone number.
- In the **Confirmation no.** field, enter "RFS224". This is the number given by the hotel to verify Richard's reservation.
- In the **Check-in date** field, enter the date 07/21/2006. In the **time** field, enter "2:00 PM". This is the date and time Richard can check into his hotel room.
- In the **Check-out date** field, enter the date 07/24/2006. In the **time** field, enter "12:00 PM". This is the date and time Richard must check out of his hotel room.
- To save the lodging information for Richard and to close his registrant record, click **Save and Close** on the toolbar. You return to the Annual Golf Tournament event record.
- Click **Save and Close**.

► Add travel information

On the Travel tab of the participant record, you can add travel information for a registrant, guest, or sponsor. This procedure focuses on how to add travel information for a registrant, but you can use similar steps for a guest or sponsor.

Scenario: Your organization holds its annual golf tournament. You offer a shuttle for players who arrive at the airport. Richard Frederick Smith, Sr., a participant of the golf tournament, needs a ride to and from the airport. Track his arrival and departure information on his registrant record. If you have not added the annual golf tournament event record, see “Add a sporting event” on page 20. If you have not added Richard as a registrant, see “Add registrants to an event” on page 125.

1. From the Annual Golf Tournament event record, select the Participants tab. For information about how to open an event record, see “Open an event record” on page 10.
2. From the tree view on the left, select **Registrants**. Only registrants appear in the grid on the right.



3. Select Richard Smith's registrant record in the grid and click **Open** on the action bar above the grid. Richard's registrant record appears.

4. Select the Travel tab.

5. In the **Travel** frame, under **Arrival**, enter arrival information.
6. In the **Type** field, select “Airline”. This is how Richard is traveling.
7. In the **Name** field, select “Air North”. This is the airline Richard is flying.
8. In the **Number** field, enter “1256”. This is Richard’s flight number.
9. In the **Date** field, enter the date 07/21/2006.
10. In the **Time** field, enter “10:00 AM”.
11. Under **Departure**, enter departure information. The departure information fields mimic the arrival information fields.
12. In the **Type** field, select “Airline”.
13. In the **Name** field, select “Air North”.
14. In the **Number** field, enter “1258”.
15. In the **Date** field, enter the date 07/24/2006.
16. In the **Time** field, enter “4:00 PM”.
17. To save the travel information for Richard and close his registrant record, click **Save and Close** on the toolbar. You return to the Annual Golf Tournament event record.
18. Click **Save and Close**.

Registration Fees

Registration fees are the amounts of money your organization charges for the levels (or units) of participation for an event. For example, if you host a Holiday Ball, you can have two units of registration fees, one for couples and one for singles. If you host a golf tournament, you can have several units such as a single, a foursome, or a hole sponsor. The units of registration fee prices are established on the Prices tab of the event record. For information about how to establish prices, see “Set up registration fee prices for an event” on page 105.

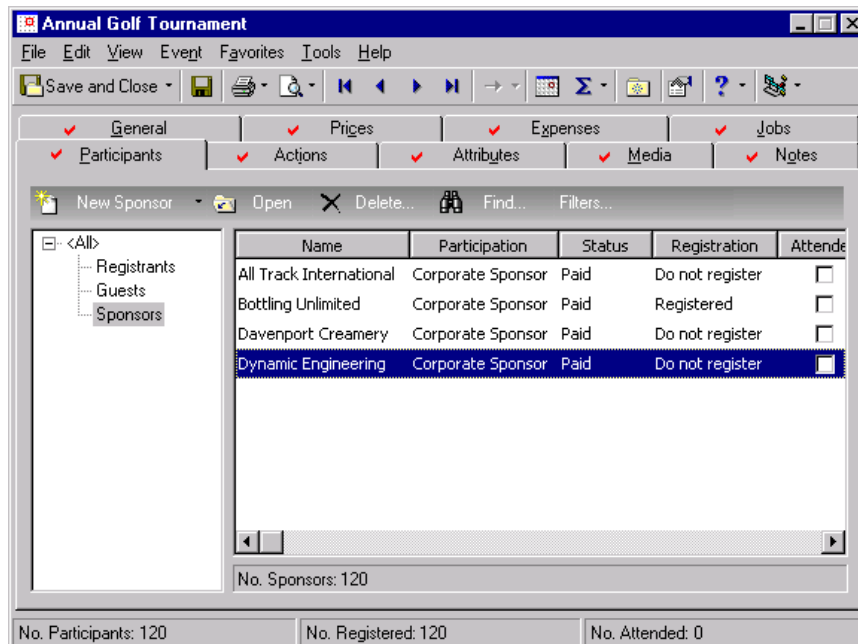
On the Registration Fees tab of a registrant, guest, or sponsor record, you can calculate the registration fees for that participant. If you click **New Registration for Grouped Event** on the Events page to register a participant to multiple events at once, you do not use the Registration Fees tab. You use the wizard for tasks on this tab. For information about registering a participant to multiple events at once, see “Grouped Event Participant Registration” on page 212.

► **Calculate registration fees for a participant**

You can manually calculate registration fees for a participant on the Registration Fees tab of the registrant, guest, or sponsor record.

Scenario: Your organization holds its annual golf tournament. You receive Dynamic Engineering's registration form and add the organization as a corporate sponsor. Now, calculate the registration fees for Dynamic Engineering. If you have not added the annual golf tournament event record, see "Add a sporting event" on page 20. If you have not added Dynamic Engineering as a sponsor, see "Add sponsors to an event" on page 138.

1. From the Annual Golf Tournament event record, select the Participants tab. For information about how to open an event record, see "Open an event record" on page 10.
2. From the tree view on the left, select **Sponsors**. Only sponsors appear in the grid on the right.



Warning: You can select Dynamic Engineering in the grid only if you previously added the organization as a sponsor. For more information about how to add sponsors, see "Add sponsors to an event" on page 138.

3. In the grid, select Dynamic Engineering and click **Open** on the action bar above the grid. Dynamic Engineering's participant (sponsor) record appears.

4. Select the Registration Fees tab.

5. In the **Unit** column of the grid, select “Hole-in-One sponsor”.
6. In the **No. Units** column, enter “1”. When you tab out of the **No. Units** column, \$1000.00 appears automatically in the **Gift Amount** column because this is the amount established for a Hole-in-One sponsor on the Prices tab of the Annual Golf Tournament event record. In the **Receipt Amount** column, \$400.00 appears automatically because this is the receipt amount established on the Prices tab of the Annual Golf Tournament event record.
7. In the **Date** column, enter the date 07/01/2006. This is the date you add the information.
8. Enter any **Comments** about the registration fees for this Hole-in-One sponsor.
9. In the **Unit** column of the next row, select “Individual” to calculate the registration fees for the participants Dynamic Engineering is sponsoring. Enter “4” in the **No. Units** column. When you tab out of the **No. Units** column, \$500.00 appears automatically in the **Gift Amount** column because the program multiplies 4 times the registration fee of \$125 for an individual established on the Prices tab of the Annual Golf Tournament event record. \$200.00 appears automatically in the **Receipt Amount** column because the program multiplies 4 times the receipt amount of \$50 for an individual established on the Prices tab.
10. In the same row, enter the date 07/01/2006 in the **Date** column. This is the date you add the information.
11. In the same row, enter any **Comments** about the registration fees for these individuals.

Note: Discounts are not applied to the **Receipt Amount**. The total receipt amount appears in the status bar at the bottom of the Registration Fees tab.

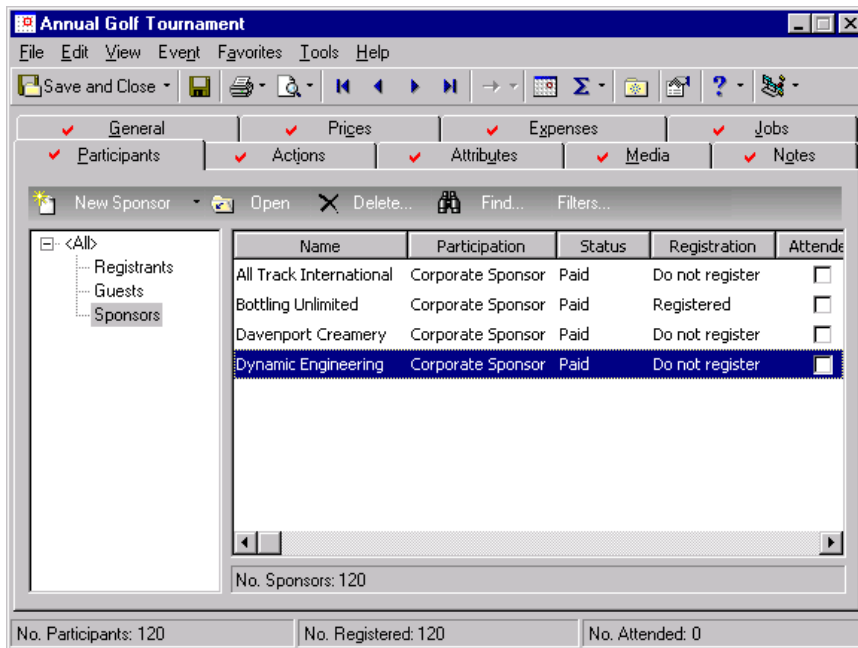
12. Mark **Apply discount** to apply a discount (an amount to be subtracted) to the total gift amount of the registration fees. The accompanying fields are enabled.
13. To discount the total gift amount of the registration fees, you can mark **Amount** or **Percent** and enter the amount or percent in the accompanying field. Because a sponsor receives a 10 percent discount on all their registration fees, mark the **Percent** option and enter “10” in the **Percent** field. In the status bar at the bottom of the tab, \$1350 appears beside **Total gift amount**. The total **Gift Amount** before the discount (\$1,500) minus the ten percent discount (\$150) equals \$1,350.
14. After you add registration fees information, click **Save and Close** on the toolbar. You return to the Annual Golf Tournament event record.
15. Click **Save and Close**.

► **Auto-generate registration fees for a registrant or a sponsor**

To automatically calculate registration fees for a registrant who has guests or a sponsor who is sponsoring registrants, click **Auto Generate Fees** on the Registration Fees tab of a participant record. The **Auto Generate Fees** button does not appear when a sponsor does not sponsor any registrants or when a registrant does not have guests. The **Auto Generate Fees** button never appears on a guest participant record.

Scenario: Your organization holds its annual golf tournament. You receive Dynamic Engineering's registration form and add them as a corporate sponsor. Now, click **Auto Generate Fees** to calculate the registration fees for Dynamic Engineering. If you have not added the annual golf tournament event record, see "Add a sporting event" on page 20. If you have not added Dynamic Engineering as a sponsor, see "Add sponsors to an event" on page 138.

1. From the Annual Golf Tournament event record, select the Participants tab. For information about how to open an event record, see "Open an event record" on page 10.
2. From the tree view on the left, select **Sponsors**. Only sponsors appear in the grid on the right.



Warning: You can select Dynamic Engineering in the grid only if you previously added the organization as a sponsor. For more information about how to add sponsors, see "Add sponsors to an event" on page 138.

3. In the grid, select Dynamic Engineering and click **Open** on the action bar above the grid. Dynamic Engineering's participant record appears.

4. Select the Registration Fees tab.

The screenshot shows a software window titled "Dynamic Engineering (Sponsor)". It has a menu bar with "File", "Edit", "View", "Participant", "Tools", and "Help". Below the menu bar is a toolbar with icons for "Save and Close", "Print", "Find", "Previous", "Next", "Home", "Help", and "Exit". The "Registrant" field is set to "Dynamic Engineering". On the left, under "Registered Events", a list includes "Alta Tennis Tournament", "Afternoon Tea", "Starlight Concert", and "Annual Golf Tourna...". The "Registration Fees" tab is selected, showing a table with columns: "Unit", "No. Units", "Gift Amount", "Receipt Amount", "Date", and "Comments". Below the table is an "Auto Generate Fees..." button. There are also fields for "Apply discount" (Amount/Percent), "Benefits" (Total benefit value: \$0.00), "Amount paid", "Date paid", and "Link to Gift". At the bottom, it shows "Total gift amount: \$0.00" and "Total receipt amount: \$0.00". A "Sporting Event" button is at the bottom right.

Warning: The **Auto Generate Fees** button does not appear on a guest participant record. The button appears only for sponsors who sponsor registrants and for registrants who bring guests.

5. Click **Auto Generate Fees**. The Auto Generate Registration Fees — Step 1 of 4 screen appears.

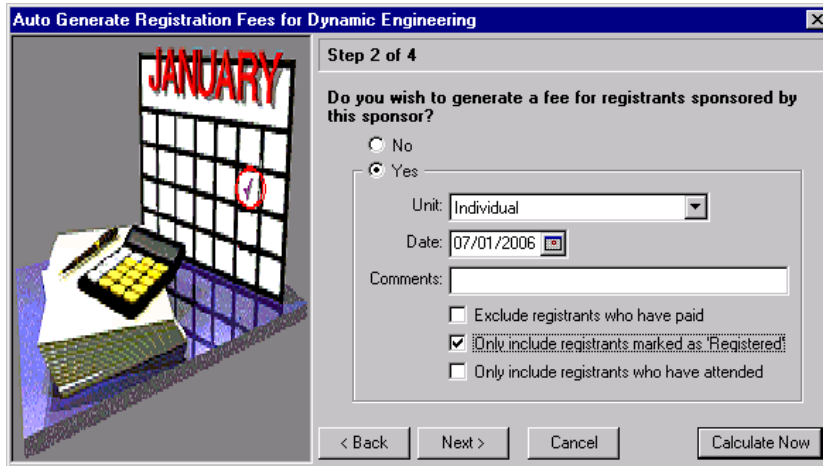
The screenshot shows a window titled "Auto Generate Registration Fees for Dynamic Engineering". It is "Step 1 of 4". On the left is a graphic of a calendar for "JANUARY" with a calculator and keyboard. The main area asks "Do you wish to generate a fee for this Sponsor?" with radio buttons for "No" and "Yes" (selected). Below are fields for "Unit" (set to "Hole-in-One Sponsor"), "Date" (set to "07/01/2006"), and "Comments". At the bottom are buttons for "< Back", "Next >", "Cancel", and "Calculate Now".

There are four steps in the Auto Generate Fees process for sponsors sponsoring registrants and three steps for registrants bringing guests.

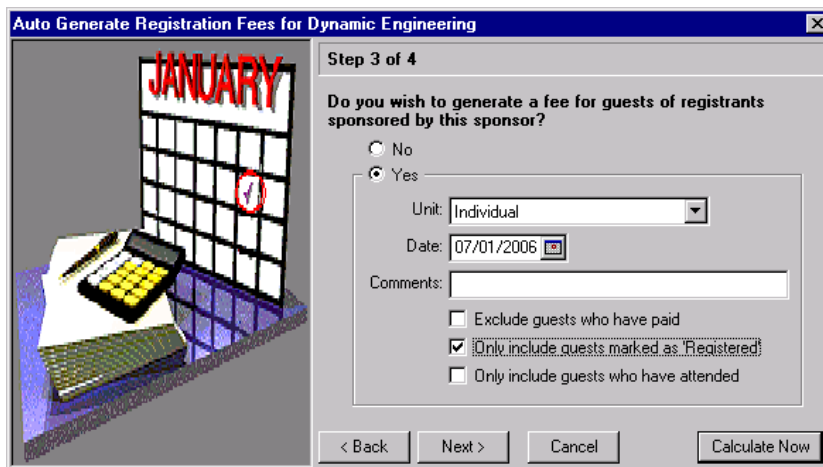
Note: To quit the Auto Generate Fees process, click **Cancel** on any Auto Generate Registration Fees screen. You return to the Registration Fees tab of the participant record.

6. Under **Do you wish to generate a fee for this Sponsor?**, select **Yes** to enable the accompanying fields.
7. In the **Unit** field, select "Hole-in-One Sponsor". Enter the date 07/01/2006 in the **Date** field and enter any **Comments** about the Hole-in-One Sponsor.

8. Click **Next**. The Auto Generate Registration Fees — Step 2 of 4 screen appears.



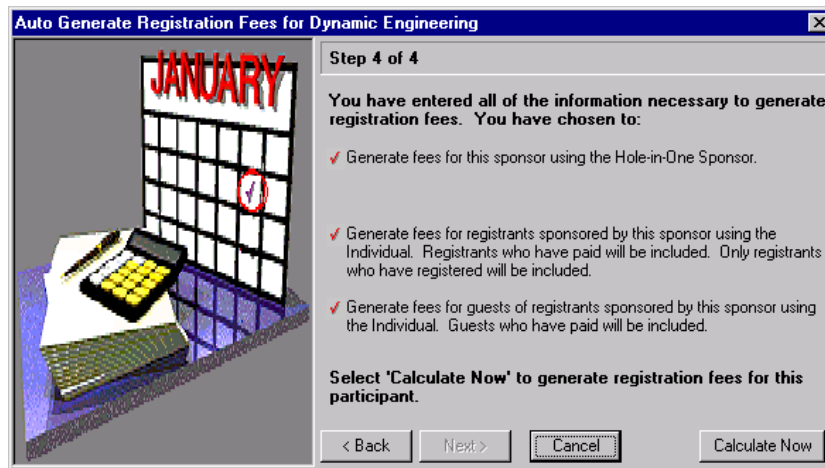
9. Under **Do you wish to generate a fee for registrants sponsored by this sponsor?**, select **Yes** to enable the accompanying fields and checkboxes.
10. In the **Unit** field, select “Individual”. Enter the date 07/01/2006 in the **Date** field and enter any **Comments** concerning the individual registrants.
11. To filter who to include or exclude, mark the accompanying checkboxes. To exclude registrants who have paid, mark that checkbox. To include only registrants marked as ‘Registered’, mark that checkbox. To include only registrants who have attended, mark that checkbox. For Dynamic Engineering’s purpose, mark **Only include registrants marked as ‘Registered’**.
12. Click **Next**. The Auto Generate Registration Fees — Step 3 of 4 screen appears.



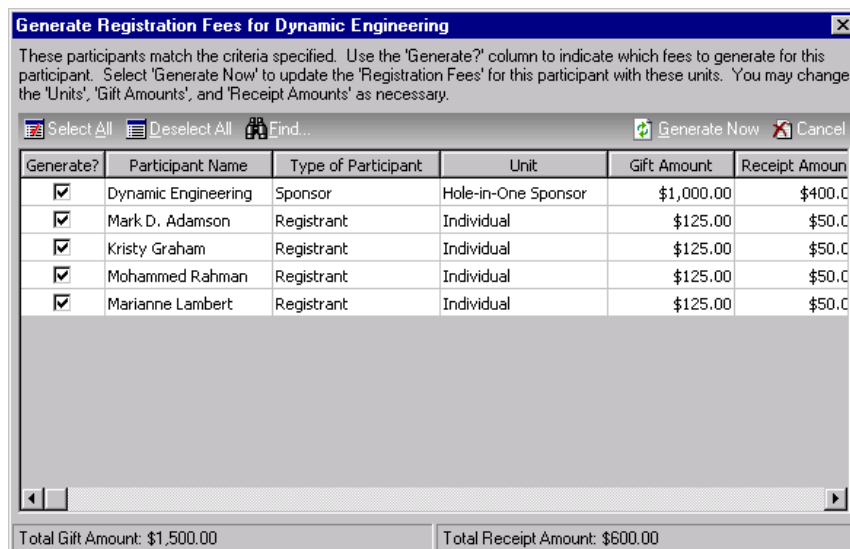
13. Under **Do you wish to generate a fee for guests of registrants sponsored by this sponsor?**, select **Yes** to enable the accompanying fields and checkboxes.
14. In the **Unit** field, select “Individual”. Enter the date 07/01/2006 in the **Date** field and enter any **Comments** concerning the guests.
15. To filter who to include or exclude, mark the accompanying checkboxes. To exclude guests who have paid, mark that checkbox. To include only guests marked as ‘Registered’, mark that checkbox. To include only guests who have attended, mark that checkbox. For Dynamic Engineering’s purpose, mark **Only include guests marked as ‘Registered’**.

Note: Before you click **Calculate Now**, if you make a mistake or simply want to change an entry on any of the previous screens, click **Back** as many times as needed to return to the appropriate screen to make your changes. After you make your changes, click **Next** as many times as needed to return to the screen where you stopped.

16. Click **Next**. The Auto Generate Registration Fees — Step 4 of 4 screen appears.



17. The Auto Generate Registration Fees — Step 4 of 4 screen shows your selections. Double-check this list and if it is correct, click **Calculate Now**. The Generate Registration Fees for Dynamic Engineering screen appears.



Tip: To select all participants in the grid on the Generate Registration Fees screen, click **Select All** on the action bar above the grid. To unmark all check marks in the **Generate?** columns, click **Deselect All**.

18. The participants on the Generate Registration Fees for Dynamic Engineering screen match the criteria you specified on the Auto Generate Registration Fees screens. In the **Generate?** column by the participants for whom you want to generate registration fees, mark the checkbox.

19. On the action bar, click **Generate Now** to generate registration fees for the selected participants. After the registration fees are generated, you return to the Registration Fees tab of Dynamic Engineering's participant record. The generated fees appear in the grid on this tab.

20. After you add registration fees information on Dynamic Engineering's participant record, click **Save and Close** on the toolbar. You return to the Annual Golf Tournament event record.
21. Click **Save and Close**.

► Link registration fees to a constituent gift

Note: From *Reports*, you can run a Registration Fees Dues Report to list participants who have not paid or only partially paid their registration fees. You can also print a summary by sponsor. For information, see the *Reports Guide*.

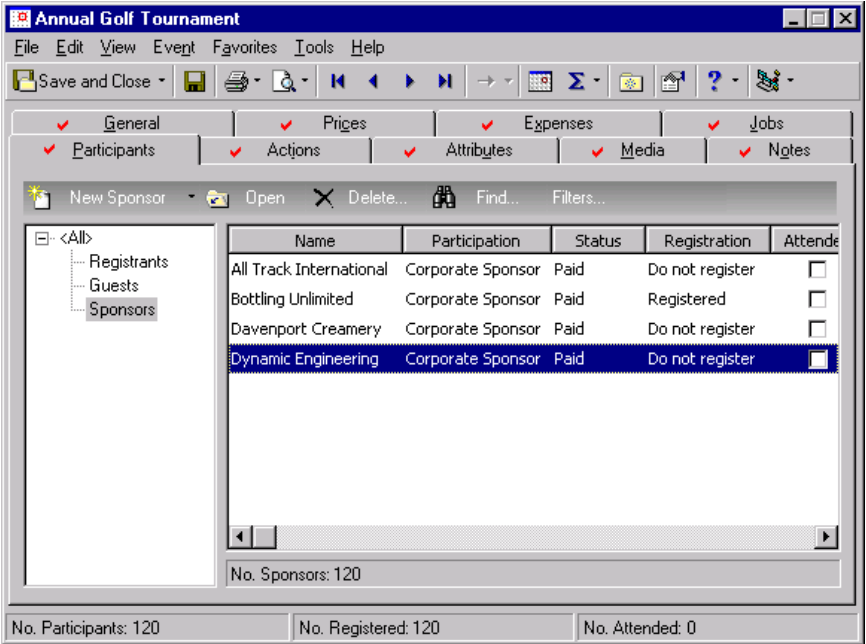
To link a constituent gift to pay registration fees for a participant who is a constituent in your database, click **Link to Gift** on the Registration Fees tab of the constituent's participant record. The **Link to Gift** button appears on the Registration Fees tab for a participant who is not a constituent in your database, but the gift you link must be from another constituent in your database. To add a gift from a participant who is not a constituent, you must first add the participant as a constituent. Once you link a gift to pay registration fees for a participant who is a constituent, the **Link to Gift** button changes to the **View Gifts** button.

Scenario: Your organization holds its annual golf tournament. You receive Dynamic Engineering's registration form and add the organization as a corporate sponsor. You calculate the registration fees for Dynamic Engineering. Now, link a gift in your database to pay the registration fees for Dynamic Engineering. If you have not added the annual golf tournament event record, see "Add a sporting event" on page 20. If you have not added Dynamic Engineering as a sponsor, see "Add sponsors to an event" on page 138. If you have not calculated registration fees for Dynamic Engineering, see "Calculate registration fees for a participant" on page 163.

1. From the Annual Golf Tournament event record, select the Participants tab. For information about how to open an event record, see "Open an event record" on page 10.

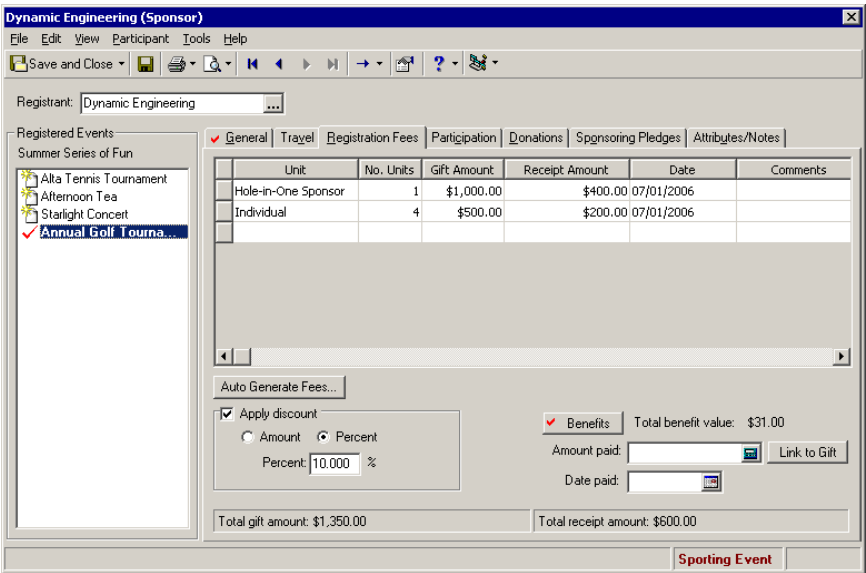
Warning: You can select Dynamic Engineering in the grid only if you first added the organization as a sponsor. For information about how to add sponsors, see “Add sponsors to an event” on page 138.

2. From the tree view on the left, select **Sponsors**. Only sponsors appear in the grid on the right.



Warning: The **Link to Gift** and **View Gifts** buttons are available for participants who are not constituents, but a gift must come from a constituent in your database. To add a gift from a participant who is not a constituent, you must add the participant as a constituent first. To add a participant as a constituent, select **Add this participant as a constituent** from the **Participant** menu of the participant record.

3. In the grid, select Dynamic Engineering and click **Open** on the action bar above the grid. Dynamic Engineering’s participant record appears.
4. Select the Registration Fees tab.



Note: You can also link a gift to pay registration fees from a gift record or from a gift batch. For information about how to link a gift to pay registration fees, see the *Event Gifts Guide*.

- Click **Link to Gift**. The Open screen for gifts appears so you can search for a gift in your database to link as the payment for Dynamic Engineering's registration fees. Once you search and find the gift to link, the Amount to Apply to Registration Fees screen appears so you can indicate how much of Dynamic Engineering's gift to link. You can link all the gift or a portion.

For information about how to add gifts, see the *Gift Records Guide*. For information about event gifts, see the *Event Gifts Guide*.

- in the **Amount to apply to this Participant** field, enter the amount \$1,350.

Note: Once you link a gift, the **Link to Gift** button changes to **View Gifts**. If you click **View Gifts**, the Linked Gifts for Participant screen appears so you can link a new gift, open an existing gift, or break a link to an existing gift. For information about event gifts, see the *Event Gifts Guide*.

- Click **OK**. The Linked Gifts for Participant screen appears.

On the Linked Gifts for Participant screen, you can link a new gift, open an existing gift, and break a link to an existing gift.

8. On the Linked Gifts for Participant screen, click **Close**. You return to the Registration Fees tab of Dynamic Engineering's sponsor record. The **Amount Applied**, \$1,350, defaults into the **Amount paid** field. The **Gift Date**, 07/01/2006, defaults into the **Date Paid** field. The **Link to Gift** button changes to the **View Gifts** button, and a check mark appears on the button to let you readily know a gift is linked.

Dynamic Engineering (Sponsor)

File Edit View Participant Tools Help

Save and Close

Registrant: Dynamic Engineering

Registered Events: Summer Series of Fun

- Alta Tennis Tournament
- Afternoon Tea
- Starlight Concert
- ✓ Annual Golf Tourna...

General | **Registration Fees** | Participation | Donations | Sponsoring Pledges | Attributes/Notes

Unit	No. Units	Gift Amount	Receipt Amount	Date	Comments
Hole-in-One Sponsor	1	\$1,000.00	\$400.00	07/01/2006	
Individual	4	\$500.00	\$200.00	07/01/2006	

Auto Generate Fees...

☐ Apply discount

Amount: Percent:

Amount:

☒ Benefits Total benefit value: \$31.00

Amount paid: \$1,350.00 View Gifts

Date paid: 07/01/2006

Total gift amount: \$1,500.00 Total receipt amount: \$600.00

Sporting Event

9. On the toolbar, click **Save and Close**. You return to the Annual Golf Tournament event record.
10. Click **Save and Close**.

Benefits on the Participants Tab

Benefits are gifts your organization gives to the participants of an event when they donate a certain amount of money. Default benefits for each unit (level) of registration fee prices are set up on the Prices tab of the event record. For example, if you host a golf tournament, you may give out a golf cap to individual players, a T-shirt to those who participate as a team, and a \$25 pro shop gift certificate to your Hole-in-One sponsors.

The benefits you set up on the Prices tab of the event record default in for the registration fees you calculate on the Registration Fees tab of a registrant, guest, or sponsor record. For example, on the Registration Fees tab, when you calculate the registration fees for an individual golf participant, the golfing hat you set up as a default benefit for that unit (or price level) on the Prices tab of the event record, appears on the Registration Fees tab of the registrant, guest, or sponsor record. To view these benefits, you must click **Benefits** on the Registration Fees tab.

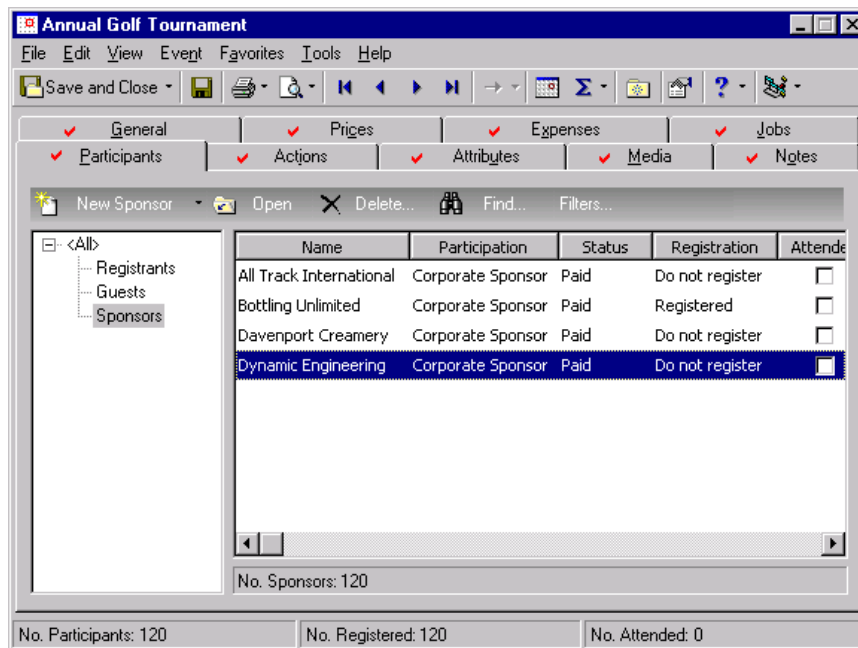
It is possible to add and edit benefits from the Registration Fees tab, but for more organized record keeping, we recommend you set these default benefits up on the Prices tab of the event record. If you add a benefit from the Registration Fees tab of the participant record, the benefit also appears on the Prices tab of the event record. If you edit a benefit from the Registration Fees tab, the benefit does not change on the Prices tab of the event record. For information about how to set up benefits on the Prices tab of an event record, see "Add benefits for each unit in the Prices grid" on page 106.

► View benefits from a participant record

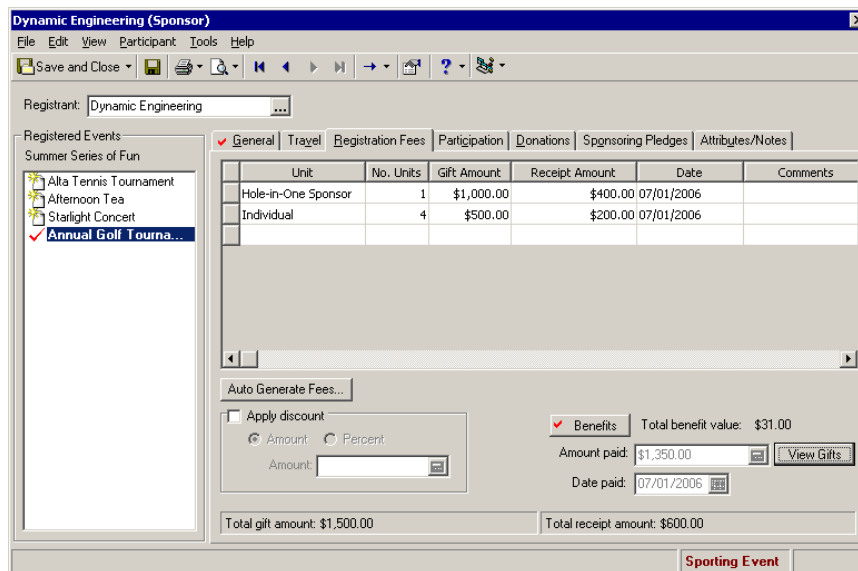
On the Registration Fees tab, you can view the default benefits for the registration fees calculated.

1. From an event record, select the Participants tab. For information about how to open an event record, see "Open an event record" on page 10.

- From the tree view on the left, select **Registrants**, **Guests**, or **Sponsors**. The type of participant selected determines what appears in the grid on the right.



- In the grid, select the registrant, guest or sponsor for whom to view benefits and click **Open** on the action bar above the grid. The participant record appears.
- Select the Registration Fees tab.



Warning: For consistent record keeping, we recommend you add your benefits on the Prices tab of the event record. You can add or edit benefits here on the Registration Fees tab of a participant record. Any benefits you add on the Registration Fees tab reflect on the Prices tab of the event record. Any edits you make to the benefits that default onto the Registration Fees tab do not reflect on the Prices tab of the event record.

5. Click **Benefits**. The Benefits screen appears. The benefits established on the Prices tab of the event record default into the grid.

Benefits for Dynamic Engineering

Use the grid to enter benefits for this participant. In the event that a gift is linked to this participant, the benefits can be loaded on the gift as well.

☐ Waive benefits

Benefit	Count	Unit Cost	Total Benefit/Value	Sent/Fulfilled	Comments
T-Shirt	4	\$10.00	\$40.00		Pick up at event
Golfing cap	4	\$5.00	\$20.00		Pick up at event

Total: \$60.00

Notes:

The participants sponsored by Dynamic Engineering receive a tee shirt and a golfing cap. The gifts can be picked up at the registration table on the day of the tournament.

OK Cancel

6. After you view benefits, click **OK**. You return to the Registration Fees tab of the registrant, guest, or sponsor record.
7. On the toolbar, click **Save and Close**. You return to the event record.
8. Click **Save and Close**.

Participation

You can indicate a specific participation type on the Participation tab of a registrant, guest, or sponsor record. You can indicate if the participant is a speaker for the event or a vendor for the event. If the participant is a constituent in your database, and you use *Volunteer Management*, you can indicate that the participant is a volunteer for the event.

Speakers

Speakers are the participants who give a speech at your event. You must enter all speakers as either registrants, guests, or sponsors of the event and designate them as a speaker on the Participation tab of the registrant, guest, or sponsor record.

► Indicate a participant is an event speaker

From the Participation tab of the participant (registrant, guest, or sponsor) record, you can indicate that a participant is a speaker at an event.

Scenario: Your organization holds its annual golf tournament. Richard Frederick Smith, Sr., a participant of the golf tournament, will give a short welcome address. Afterward, he will give a speech on "Golf Course Safety." Indicate that Richard is a speaker of the event on the Participation tab of his registrant record and enter any necessary information about his speech. If you have not added the annual golf tournament event record, see "Add a sporting event" on page 20. If you have not added Richard as a registrant, see "Add registrants to an event" on page 125.

1. From the Annual Golf Tournament event record, select the Participants tab. For information about how to open an event record, see "Open an event record" on page 10.

- From the tree view on the left, select **Registrants**. Only registrants appear in the grid on the right.

The screenshot shows the 'Annual Golf Tournament' application window. On the left is a tree view with 'Registrants' selected. The main area displays a grid of registrant information. The grid has columns for Name, Participation, Status, Registration, and Attendance. The bottom status bar shows 'No. Participants: 120', 'No. Registered: 120', and 'No. Attended: 0'.

Name	Participation	Status	Registration	Attendance
Mark D. Adamson	Player	Paid	Registered	<input type="checkbox"/>
Timothy D. Billings	Player	Paid	Registered	<input type="checkbox"/>
Jason D. Campbell	Player	Paid	Registered	<input type="checkbox"/>
Ryan K. Dorrión	Player	Paid	Registered	<input type="checkbox"/>
Susan E. McDonald	Player	Paid	Registered	<input type="checkbox"/>
Orla McGrann	Player	Paid	Registered	<input type="checkbox"/>
Thomas C. Moorer	Player	Paid	Registered	<input type="checkbox"/>
David B. Murphy	Player	Paid	Registered	<input type="checkbox"/>
Richard F. Smith	Captain	Paid	Registered	<input type="checkbox"/>

- Select Richard Smith's registrant record in the grid and click **Open** on the action bar above the grid. Richard's registrant record appears.

The screenshot shows the 'Richard F. Smith (Registrant)' detail window. The 'Participation' tab is selected. The 'General' sub-tab is active, showing options for 'Participant is a Speaker for this Event', 'Participant is a Vendor for this Event', and 'Participant is a Volunteer for this Event'. The 'Speaker' option is checked, and the 'Topic' field contains 'Golf Course Safety'. The 'Time' field contains '7:00 AM'. The 'Comments' field contains 'Richard is giving a brief welcome address, followed by his Golf Course Safety speech.'.

- Select the Participation tab.
- Mark **Participant is a Speaker for this Event**.
- In the **Topic** field, enter "Golf Course Safety". This is what Richard will speak about.
- In the **Time** field, enter "7:00 AM". This is the time Richard will give his speech. The **Time** field is a text field, so you can enter anything you want. Perhaps, you may want to enter "30 minutes" to indicate the duration of the speech instead of the time the speech starts.
- In the **Comments** box, enter "Richard will give a brief welcome address, followed by his Golf Course Safety speech."

9. To save the information on the Participation tab of Richard's record, click **Save and Close** on the toolbar. You return to the Participants tab of the Annual Golf Tournament event record.
10. Click **Save and Close**.

Vendors

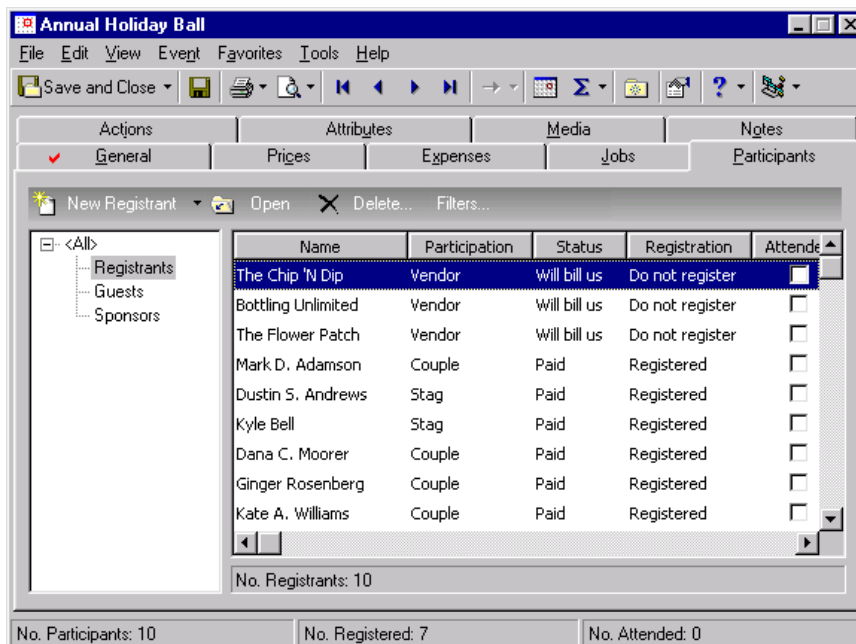
A vendor is an individual or organization that provides a service or product for an event, such as the catering service. You must enter each event vendor as a participant (registrant, guest, or sponsor) of the event and designate them as a vendor on the Participation tab of their participant record.

► Indicate a participant is a vendor

You can indicate that a participant is a vendor from the Participation tab of a registrant, guest, or sponsor record.

Scenario: Your organization hosts its Annual Holiday Ball. You hire the Chip 'N Dip, a catering service, to provide the appetizers and desserts for the ball. After you enter the Chip 'N Dip as a registrant, indicate on the registrant record that the Chip 'N Dip is a vendor. After you indicate the Chip 'N Dip is a vendor, enter necessary vendor information and expenses. If you have not added the Annual Holiday Ball event record, see "Add an event with the category of Other" on page 25.

1. From the Annual Holiday Ball event record, select the Participants tab. For information about how to open an event record, see "Open an event record" on page 10.
2. From the tree view on the left, select **Registrants**. Only registrants appear in the grid on the right.



Warning: The Chip 'N Dip's participant record appears in the grid only if you first added them as a participant of the event.

3. Select the Chip 'N Dip's registrant record in the grid and click **Open** on the action bar above the grid. The Chip 'N Dip's registrant record appears.

15. In the **Paid** column of the same row, enter the amount \$2,500. You already sent a check for the desserts to Chip 'N Dip.
16. In the **Date** column of the same row, enter the date 12/01/2007. This is the date you sent the check.
17. In the **Comments** column, enter "15 different desserts".
18. Repeat this procedure as many times as needed to record expenses incurred for this vendor. The total expenses, total budgeted, and the total paid appear at the bottom of the Expenses screen.
19. Click **OK**. You return to the Chip 'N Dip registrant record.
20. On the Chip 'N Dip registrant record, click **Save and Close** on the toolbar. You return to the Participants tab of the Annual Holiday Ball event record.
21. Click **Save and Close**.

Event Volunteers

An event volunteer is a participant who voluntarily undertakes a service at an event and expects no pay in return. For example, your organization is a museum and you host an opening party for your new wing. Two people from the community volunteer to serve as greeters at the door the night of the party. You hold a Spring Gala. Several members of the community voluntarily help you plan the gala. Others help you decorate, send out invitations, and hire entertainment. You hold a golf tournament and two individuals offer to take event photos for your newsletter. All these people are your event volunteers.

In the optional module *Event Management*, you can enter a volunteer as a registrant, guest, or sponsor. A volunteer may or may not be assigned to jobs at an event. You may have a volunteer who attends an event, but does not work at that particular event. If a volunteer works at an event, you can designate how he participates on the Participation tab of his registrant, guest, or sponsor record. To designate a participant as a volunteer, the participant must be an individual constituent in your database and active as a volunteer. When you enter information on the Volunteer tab of a participant's constituent record, the participant becomes active in **The Raiser's Edge** as a volunteer for your organization. The Volunteer tab appears on a constituent record only when you use the optional module *Volunteer Management*. Therefore, you can indicate that a participant is a volunteer, only if you use *Volunteer Management*.

From the Participation tab, when you use the optional module *Volunteer Management*, you can also add job assignments, as well as edit and delete job assignments, if you have rights. Only job assignments linked to an event can be assigned to a registrant, guest, or sponsor.

► Indicate a participant is a volunteer

When you use the optional module *Volunteer Management*, you can indicate that a participant is a volunteer from the Participation tab of a registrant, guest, or sponsor record.

Scenario: Your organization hosts its annual golf tournament. Richard Frederick Smith, Sr., a volunteer with your organization, informs you that he will serve as this year's event photographer. Indicate that Richard is a volunteer for this event on the Participation tab of his registrant record and add a job assignment for him. If you have not added the annual golf tournament event record, see "Add a sporting event" on page 20. If you have not added Richard as a registrant, see "Add registrants to an event" on page 125.

1. From the Annual Golf Tournament event record, select the Participants tab. For information about how to open an event record, see "Open an event record" on page 10.

- From the tree view on the left, select **Registrants**. Only registrants appear in the grid on the right.

Name	Participation	Status	Registration	Attendance
Mark D. Adamson	Player	Paid	Registered	<input type="checkbox"/>
Timothy D. Billings	Player	Paid	Registered	<input type="checkbox"/>
Jason D. Campbell	Player	Paid	Registered	<input type="checkbox"/>
Ryan K. Dorrión	Player	Paid	Registered	<input type="checkbox"/>
Susan E. McDonald	Player	Paid	Registered	<input type="checkbox"/>
Orla McGrann	Player	Paid	Registered	<input type="checkbox"/>
Thomas C. Mooror	Player	Paid	Registered	<input type="checkbox"/>
David B. Murphy	Player	Paid	Registered	<input type="checkbox"/>
Richard F. Smith	Captain	Paid	Registered	<input type="checkbox"/>

No. Registrants: 120

No. Participants: 120 No. Registered: 120 No. Attended: 0

- Select Richard Smith's registrant record in the grid and click **Open** on the action bar above the grid.
- Select the Participation tab.

Note: The **Participant is a Volunteer for this Event** checkbox and accompanying grid appear on the Participation tab of a participant record only when you use *Volunteer Management* and the participant is a constituent in your database.

- Mark **Participant is a Volunteer for this Event** because Richard is volunteering as your event photographer.

Registrant: Richard F. Smith

Registered Events: Summer Series of Fun

- Alta Tennis Tournament
- Afternoon Tea
- Starlight Concert
- ☒ Annual Golf Tournament

☒ Participant is a Speaker for this Event

Topic: Golf Course Safety Comments: Richard is giving a brief welcome address, followed by his Golf Course Safety speech.

Time: 7:00 AM

☐ Participant is a Vendor for this Event

Space no.: Booth no.: Comments: Expenses

Purpose: Reason: Expenses

☒ Participant is a Volunteer for this Event

Job Assignment	Department	Location	Category	Position

Sporting Event

6. On the action bar above the Job Assignments grid, click **New Job Assignment**. The New Job Assignment screen appears.

For information about how to add new jobs and job assignments, see the *Volunteers & Jobs Data Entry Guide*. This procedure is a basic overview. To fully understand volunteers and jobs, we suggest you read the *Volunteers & Jobs Data Entry Guide* in its entirety.

Warning: You can find the Newsletter job only if the job record was added previously and linked to the event record. For information about job records, see the *Volunteers & Jobs Data Entry Guide*.

7. In the **Job** field, click the binoculars to search for the Newsletter job. When you search for and locate the job, the job name appears automatically in the **Job** field. You can search only for jobs that have been linked to the Annual Golf Tournament event record. For information about how to link a job record to an event record, see the *Volunteers & Jobs Data Entry Guide*.

The **Category**, **Position**, and **Volunteer type** also appear automatically on the Job Assignment screen. All this information defaults on the Job Assignment screen from the job record. You can always change the information that defaults into these fields.

Note: If an entry does not exist in a drop-down list in a field where you must make a selection, you can always type your entry in the field, if you have security rights established. A message appears to ask whether to add the entry to that table. Select **Yes**. For data entry consistency, we recommend you establish your table entries from the **Tables** link of *Configuration*. For information about how to up tables, see the *Configuration & Security Guide*.

8. In the **Status** field, the **Assigned** option defaults to selected because you physically assign this job to Richard.
9. In the **Department** field, select "Sporting Events".
10. In the **Location** field, select "Fairfield Country Club".
11. In both the **Start date** and **End date** fields, enter the date 07/22/2006. This job assignment lasts only one day.
12. In the **Start time** field, enter "7:00 AM". In the **End time** field, enter "11:00 PM". The photographers are required to be at the tournament all day.
13. In the **Task** field, select "Golf Tournament Photographer".
14. In the **Supervisor** field, enter "Earl Daniels".
15. In the **Day of week** field, select "Saturday".

16. In the **Notes** box, enter “Richard volunteers to photograph most of our sporting events. Ask him about the tennis tournament in November.”
17. Click **Save and Close** on the toolbar. You return to the Participation tab of Richard’s registrant record. The job assignment appears in the grid.

Richard F. Smith (Registrant)

File Edit View Participant Tools Help

Save and Close

Registrant: Richard F. Smith

Registered Events: Summer Series of Fun

- Alta Tennis Tournament
- Afternoon Tea
- Starlight Concert
- Annual Golf Tourna...**

General Travel Registration Fees **Participation** Donations Sponsoring Pledges Attributes/Notes

☒ Participant is a Speaker for this Event

Topic: Golf Course Safety Comments: Richard is giving a brief welcome address, followed by his Golf Course Safety speech.

Time: 7:00 AM

☐ Participant is a Vendor for this Event

Space no.: Booth no.: Comments:

Purpose: Rating: Expenses

☒ Participant is a Volunteer for this Event

New Job Assignment Open Delete...

Job Assignment	Department	Location	Category	Position
Newsletter	Sporting Events	Fairfield Country ...	Newsletter	Event Photogra...

Sporting Event

18. On the toolbar, click **Save and Close**. You return to the Annual Golf Tournament event record.
19. Click **Save and Close**.

Other Donations Given to an Event

Note: From *Reports*, you can run an Event Income Report to provide an analysis and total of the income generated by an event. This report shows the date and amount paid, the sponsor name, the participation type, and the number and type of units purchased. For information, see the *Reports Guide*.

You can track other donations, besides registration fees, for a participant on the Donations tab of a registrant, guest, or sponsor record. Examples of “other” donations can be additional gifts of cash or gifts-in-kind donated to an event. Perhaps you hold a silent auction. Constituents may donate particular items for you to auction off at your event. Perhaps, some constituents send donations instead of attend the event. You track these gifts differently than the registration fees participants pay to attend the auction. You can track these additional cash gifts and gifts-in-kind on the Donations tab of a participant record.

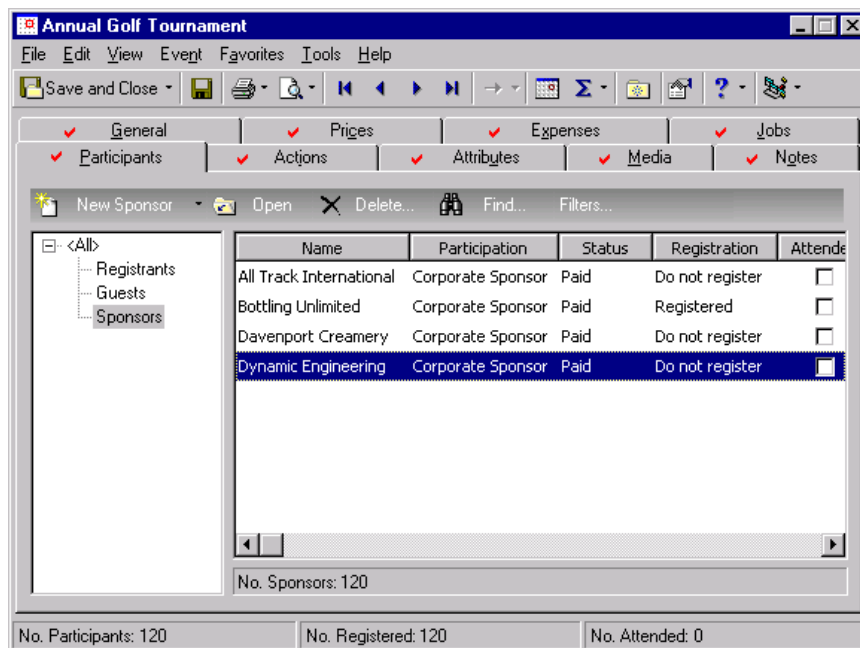
All gifts on the Donations tab must come from constituents in your database. If a participant (registrant, guest, or sponsor) is not a constituent in your database, you must make him a constituent before you can track any gifts given by the participant on the Donations tab of his participant record.

► **Add other donations for a participant**

You can add other donations on the Donations tab of a registrant, guest, or sponsor record. All gifts must come from constituents in your database.

Scenario: Your organization holds its annual golf tournament. You receive Dynamic Engineering's registration form and add the organization as a corporate sponsor. Dynamic Engineering sponsors a team in your tournament and has paid those registration fees, but they want to help you raise more money. Dynamic Engineering asks its employees to give donations. Together, they can help you exceed your goal. Add these gifts on the Donations tab of Dynamic Engineering's sponsor record. If you have not added the annual golf tournament event record, see "Add a sporting event" on page 20. If you have not added Dynamic Engineering as a sponsor, see "Add sponsors to an event" on page 138.

1. From the Annual Golf Tournament event record, select the Participants tab. For information about how to open an event record, see "Open an event record" on page 10.
2. From the tree view on the left, select **Sponsors**. Only sponsors appear in the grid on the right.



3. In the grid, select Dynamic Engineering and click **Open** on the action bar above the grid. Dynamic Engineering's participant (sponsor) record appears.

4. Select the Donations tab. The grid on this tab lists all “other” donations given to your organization by Dynamic Engineering, or any constituents associated with Dynamic Engineering.

Gift Date	Gift Type	Fund	Amount	Constituent	Reference
06/22/2006	Cash	Annabelle Johnso...	\$50.00	Orla A. McGrann	Annual Golf Tourn...
06/23/2006	Cash	Annabelle Johnso...	\$100.00	Clara M. Daniels	Annual Golf Tourn...
06/26/2006	Cash	Annabelle Johnso...	\$25.00	Norbert G. Wilkens	Annual Golf Tourn...
06/26/2006	Cash	Annabelle Johnso...	\$5,000.00	Dynamic Engineering	Annual Golf Tourn...
06/28/2006	Cash	Annabelle Johnso...	\$250.00	Agnes M. Cone	Annual Golf Tourn...
06/29/2006	Cash	Annabelle Johnso...	\$25.00	Mary Beth Richardson	Annual Golf Tourn...

Warning: Other donations must come from constituents in your database.

5. On the action bar, click **New Gift**. The Open screen for gifts appears so you can search for a gift in your database to link to Dynamic Engineering’s Donations tab. From the Open screen you can also add a new gift. Once you search and find the gift (or add a new gift), the linked gift appears in the grid.

Gift Date	Gift Type	Fund	Amount	Constituent	Reference
06/22/2006	Cash	Annabelle Johnso...	\$50.00	Orla A. McGrann	Annual Golf Tourn...
06/23/2006	Cash	Annabelle Johnso...	\$100.00	Clara M. Daniels	Annual Golf Tourn...
06/26/2006	Cash	Annabelle Johnso...	\$25.00	Norbert G. Wilkens	Annual Golf Tourn...
06/26/2006	Cash	Annabelle Johnso...	\$5,000.00	Dynamic Engineering	Annual Golf Tourn...
06/28/2006	Cash	Annabelle Johnso...	\$250.00	Agnes M. Cone	Annual Golf Tourn...
06/29/2006	Cash	Annabelle Johnso...	\$25.00	Mary Beth Richardson	Annual Golf Tourn...
06/30/2006	Cash	Annabelle Johnso...	\$75.00	Wade C. Grayson	Annual Golf Tourn...

Note: You can also link a gift to pay other donations from a gift record or from a gift batch. For information about how to link a gift to pay other donations, see the *Event Gifts Guide*.

6. To open a gift to view or edit, if you have rights established from the **Security** link of *Administration*, select a gift in the grid and click **Open** on the action bar.
7. When you finish adding “other” donations, click **Save and Close** on the toolbar. You return to the event record.
8. Click **Save and Close**.

Sponsoring Pledges

Warning: Sponsoring pledges can be given only for participants of a sporting event.

Sponsoring Pledges are donations made on behalf of a registrant, guest, or sponsor participating in a sporting event. For example, your organization holds a walk-a-thon for breast cancer awareness. All proceeds go to breast cancer research. The participants of your event ask as many people as possible to donate a certain amount of money for each mile they walk. Another example is when your organization holds its annual golf tournament. Southern Corporation, a sponsor of your tournament, asks each of its employees to donate a certain amount of money for each participant playing on their team. These donations are sponsoring pledges. Sponsoring pledges bring in extra donations for an event.

You must enter the donors of sponsoring pledges as constituents in your database. You can track sponsoring pledges on the Sponsoring Pledges tab of a registrant, guest, or sponsor record.

► Add sponsoring pledges for participants of a sporting event

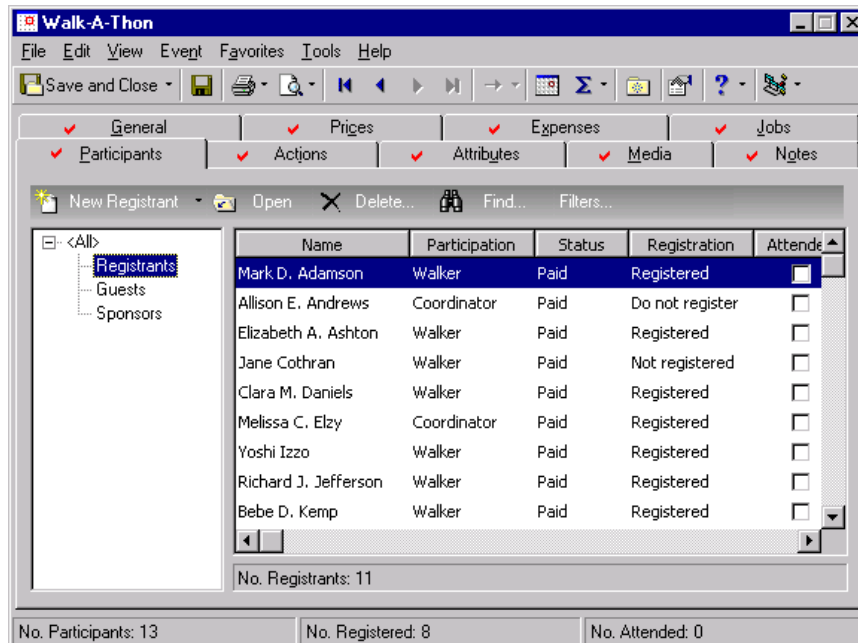
Note: The Sponsoring Pledges tab appears only on a participant record added to a sporting event. For information about how to add a sporting event, see “Add a sporting event” on page 20.

You can track sponsoring pledge donations made on behalf of a participant of a sporting event. You track sponsoring pledges on the Sponsoring Pledges tab of a registrant, guest, or sponsor record. If you select a category on the General tab of your event record, other than **Sporting event**, the Sponsoring Pledges tab does not appear on any participant records.

Scenario: Your organization holds its annual walk-a-thon. Mark Adamson, a participant of the walk-a-thon, asks many of his friends to sponsor him in the walk. George Finley, a friend, says he can pledge \$50. Add this sponsoring pledge on Mark Adamson’s registrant record. If you have not added a walk-a-thon event record, see “Add a sporting event” on page 20. If you have not added registrants, see “Add registrants to an event” on page 125.

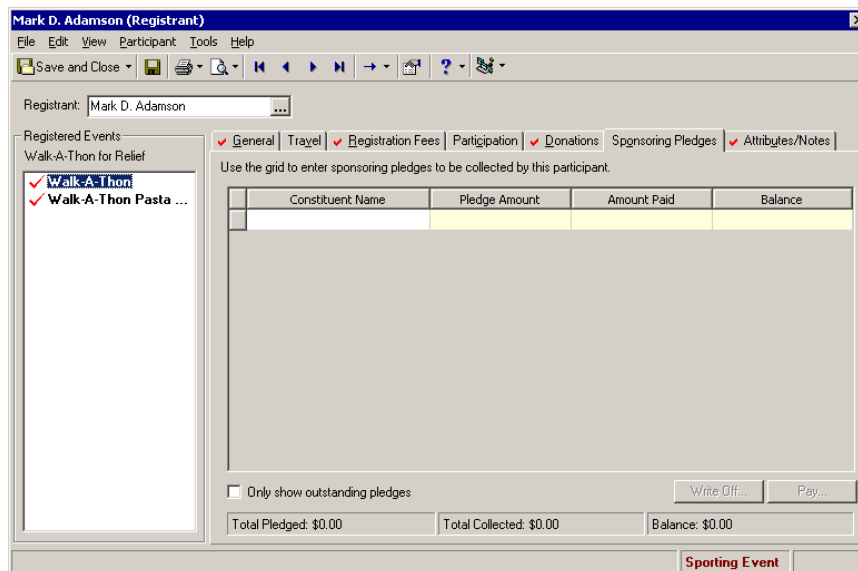
1. From the Walk-a-Thon event record, select the Participants tab. For information about how to open an event record, see “Open an event record” on page 10.

- From the tree view on the left, select **Registrants**. Only registrants appear in the grid on the right.



Note: You can type a constituent name in the **Constituent Name** column. When you tab out of this column, if the program cannot find the constituent, the Open screen for constituents appears so you can search your database for the constituent who gives a sponsoring pledge for the participant. You can track only sponsoring pledges given from constituents in your database.

- In the grid, select Mark Adamson and click **Open** on the action bar above the grid. Mark Adamson's participant (registrant) record appears.
- Select the Sponsoring Pledges tab.



- In the first empty row, click in the **Constituent Name** column to access the binoculars. Click the binoculars to search for George Finley, the constituent in your database who gives a sponsoring pledge for Mark. After you search and select George, his constituent name defaults into the **Constituent Name** column.

The screenshot shows a software window titled "Mark D. Adamson (Registrant)". It has a menu bar (File, Edit, View, Participant, Tools, Help) and a toolbar. Below the toolbar is a "Registrant:" field with "Mark D. Adamson" entered. On the left is a "Registered Events" list with "Walk-A-Thon for Relief" and "Walk-A-Thon Pasta ..." under a checked "Walk-A-Thon" event. The main area has tabs: General, Travel, Registration Fees, Participation, Donations, Sponsoring Pledges (selected), and Attributes/Notes. Below the tabs is a text prompt: "Use the grid to enter sponsoring pledges to be collected by this participant." Below this is a grid with four columns: Constituent Name, Pledge Amount, Amount Paid, and Balance. The first row contains "George D. Finley" in the first column. At the bottom, there is a checkbox "Only show outstanding pledges", buttons "Write Off..." and "Pay...", and summary fields: "Total Pledged: \$0.00", "Total Collected: \$0.00", and "Balance: \$0.00". A "Sporting Event" button is at the very bottom right.

Constituent Name	Pledge Amount	Amount Paid	Balance
George D. Finley			

Note: To link an existing pledge, you can also right-click on the row of the constituent who gives the pledge and select **Link Existing Pledge**. The Open screen for gifts appears so you can search for a gift to link to the constituent. The **Pledge Amount**, **Amount Paid**, and **Balance** all default into the Sponsoring Pledges grid from the linked pledge gift record. If a required field on the linked pledge gift record is missing, you receive a warning.

- In the **Pledge Amount** column, enter \$50 to establish how much George pledged. This column is required once you enter a constituent name. Once you enter a pledge amount and tab out of this column, a message appears to inform you that a fund is missing.

7. Click **OK**. A gift record for George's pledge appears. Before the gift record appears, if you receive a message that asks whether to apply the gift to anything else, click **No**.

Note: To set up gift defaults, select **Event, Gift Defaults** from the menu bar of an event record. The defaults you set up appear automatically on the gift record linked to the event. If you set up a gift default for the fund to which event gifts are going, the fund appears automatically on the gift record and you do not receive a warning about a missing fund. For information about defaults, see the *Program Basics Guide*.

8. Select a **Fund**. It is required. You can then enter any other information on George's gift record.
For information about how to add gifts, see the *Gift Records Guide*. For information about event gifts, see the *Event Gifts Guide*.
9. After you enter a fund and any other gift information on George's gift record, click **Save and Close** on the toolbar. You return to the Sponsoring Pledges tab of Mark's registrant record. The **Amount Paid** column shows the total amount paid for the sponsoring pledge and defaults to \$0. The **Balance** column shows the balance remaining on the sponsoring pledge and defaults to \$50.

Total Pledged and **Total Collected** appear on the bottom of the tab. These fields update so you can track the pledge progress.

Mark D. Adamson (Registrant)

File Edit View Participant Tools Help

Save and Close Print Navigation

Registrant: Mark D. Adamson

Registered Events: Summer Series of Fun

- Alta Tennis Tournam...
- Afternoon Tea
- Starlight Concert
- Annual Golf Tournam...

General | Travel | Registration Fees | Participation | Donations | Sponsoring Pledges | Attributes/Notes

Use the grid to enter sponsoring pledges to be collected by this participant.

Constituent Name	Pledge Amount	Amount Paid	Balance
George D. Finley	\$50.00	\$0.00	\$50.00

☐ Only show outstanding pledges

Write Off... Pay...

Total Pledged: \$50.00 Total Collected: \$0.00 Balance: \$50.00

Sporting Event

For information about pledges, see the Pledges chapter of the *Gift Records Guide*.

Note: You can link a gift to pay sponsoring pledges from a gift record or from a gift batch. For information about how to link a gift to pay sponsoring pledges, see the *Event Gifts Guide*

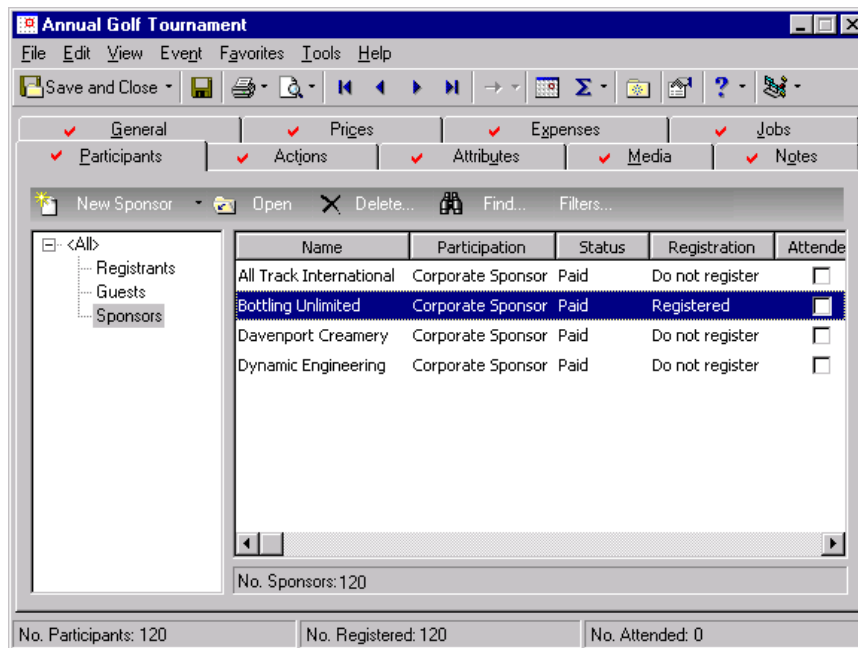
- To display only pledges with a balance in the Sponsoring Pledges grid, mark **Only show outstanding pledges**.
- After you enter information on the Sponsoring Pledges tab, click **Save and Close** on the toolbar. You return to the event record.
- Click **Save and Close**.

► Write off sponsoring pledges

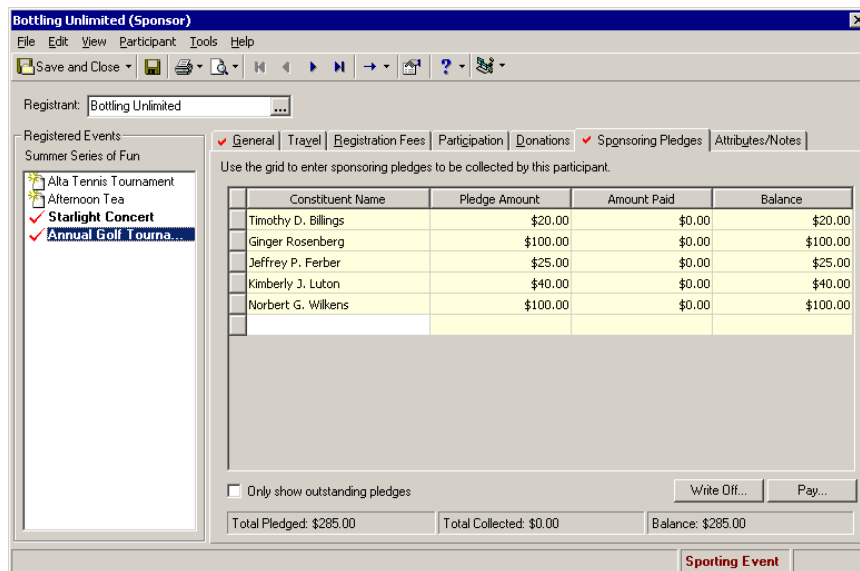
If a constituent donates a sponsoring pledge, but then cannot pay the pledge, you can write off the sponsoring pledge. For information about how to write off pledges, see the Pledges chapter of the *Gift Records Guide*. For information about sponsoring pledges, see the *Event Gifts Guide*.

- From a sporting event record, select the Participants tab. For information about how to open an event record, see “Open an event record” on page 10.

- From the tree view on the left, select **Registrants**, **Guests**, or **Sponsors**. The type of participant selected determines what appears in the grid on the right.



- Select the registrant, guest, or sponsor for whom to write off a sponsoring pledge from the grid and click **Open** on the action bar above the grid. The participant record appears.
- Select the Sponsoring Pledges tab.



5. Click **Write Off**. The Write Off Sponsoring Pledges screen appears.

Write Off?	Constituent	Pledge Amount	Balance	Amount to Write Off
<input type="checkbox"/>	Timothy D. Billings	\$20.00	\$20.00	
<input checked="" type="checkbox"/>	Ginger Rosenberg	\$100.00	\$100.00	\$100.00
<input type="checkbox"/>	Jeffrey P. Ferber	\$25.00	\$25.00	
<input type="checkbox"/>	Kimberly J. Luton	\$40.00	\$40.00	
<input checked="" type="checkbox"/>	Norbert G. Wilkens	\$100.00	\$100.00	\$100.00

Tip: To select all participants in the grid on the Write Off Sponsoring Pledges screen, click **Select All** on the action bar above the grid. To unmark all check marks in the **Write Off?** column, click **Deselect All**.

- In the **Write Off?** column, mark the checkbox by the participant(s) for whom to write off a sponsoring pledge. The checkboxes in the **Write Off?** column default to marked. Unmark and mark these as necessary.
- In the same row, enter the amount to write off in the **Amount to Write Off** column. If you mark a checkbox in the **Write Off?** column for a participant, the participant's pledge balance automatically appears in this column. You can leave the pledge balance or change the balance to the amount to write off.

Note: If you mark **Only show outstanding pledges** on the Sponsoring Pledges tab, the pledges disappear from the grid once you completely write them off.

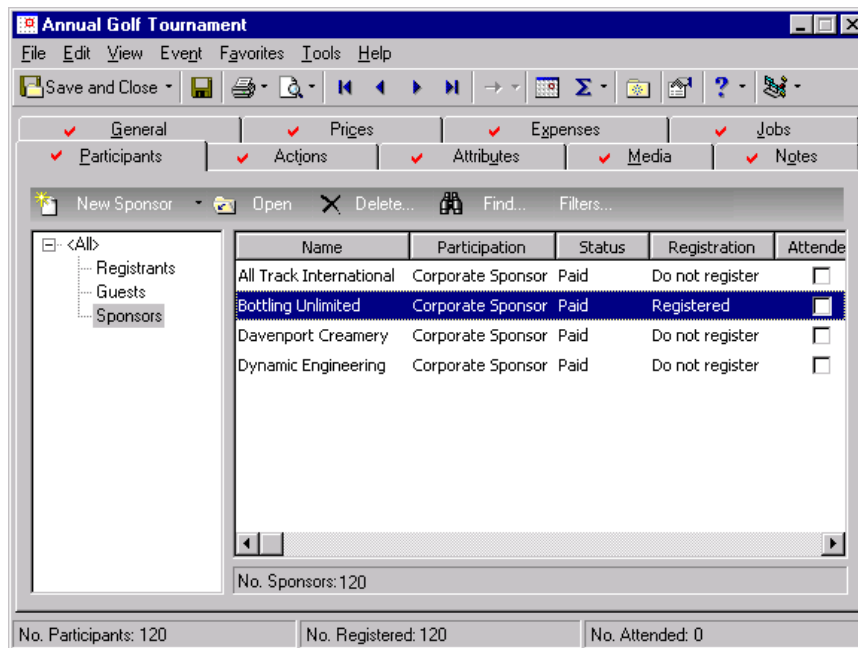
- To write off sponsoring pledges for the selected participant(s), click **Write Off Now** on the action bar. After the selected sponsoring pledges are written off, you return to the Sponsoring Pledges tab of the registrant, guest, or sponsor record. The correct balance appears in the **Balance** column.
- On the registrant, guest, or sponsor record, click **Save and Close** on the toolbar. You return to the event record.
- Click **Save and Close**.

► Pay sponsoring pledges

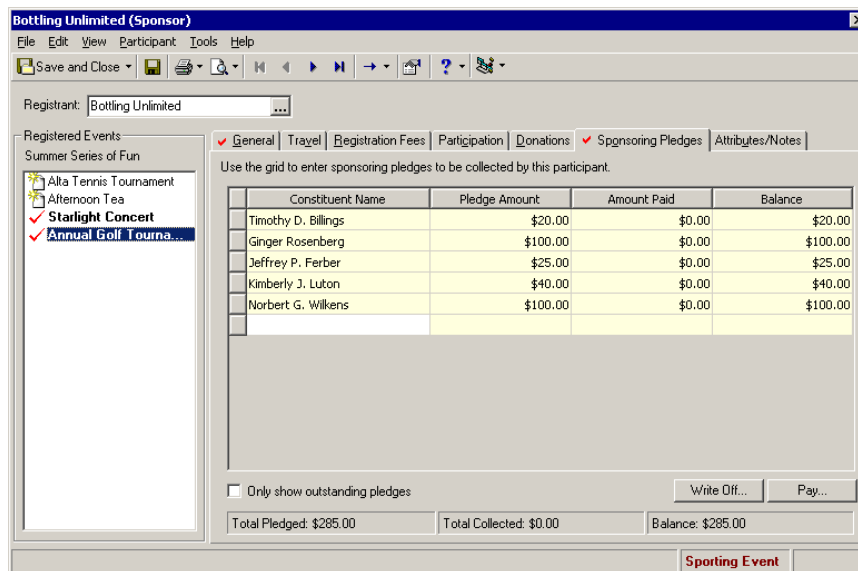
You can pay sponsoring pledges from the Sponsoring Pledges tab of a registrant, guest, or sponsor record. For information about how to pay pledges, see the Pledges chapter of the *Gift Records Guide*. For information about sponsoring pledges, see the *Event Gifts Guide*.

- From a sporting event record, select the Participants tab. For information about how to open an event record, see "Open an event record" on page 10.

- From the tree view on the left, select **Registrants**, **Guests**, or **Sponsors**. The type of participant selected determines what appears in the grid on the right.



- Select the registrant, guest, or sponsor for whom to pay a sponsoring pledge from the grid and click **Open** on the action bar above the grid. The participant record appears.
- Select the Sponsoring Pledges tab.



5. Click **Pay**. The Pay Sponsoring Pledges screen appears.

Pay?	Constituent	Pledge Amount	Balance	Amount to Pay
<input checked="" type="checkbox"/>	Timothy D. Billings	\$20.00	\$20.00	\$20.00
<input type="checkbox"/>	Ginger Rosenberg	\$100.00	\$100.00	\$100.00
<input checked="" type="checkbox"/>	Jeffrey P. Ferber	\$25.00	\$25.00	\$25.00
<input checked="" type="checkbox"/>	Kimberly J. Luton	\$40.00	\$40.00	\$40.00
<input type="checkbox"/>	Norbert G. Wilkens	\$100.00	\$100.00	\$100.00

Tip: To select all participants in the grid on the Pay Sponsoring Pledges screen, click **Select All** on the action bar above the grid. To unmark all check marks in the **Pay?** column, click **Deselect All**.

- In the **Pay?** column, mark the checkbox by the participant(s) for whom to pay a sponsoring pledge. The checkboxes in the **Pay?** column default to marked. Unmark and mark these as necessary.
- In the same row, enter the amount to pay in the **Amount to Pay** column. If you mark a checkbox in the **Pay?** column for a participant, the participant's pledge balance automatically appears in this column. You can leave the pledge balance or change the balance to the amount you want to pay.

Note: If you mark **Only show outstanding pledges** on the Sponsoring Pledges tab, the pledges disappear from the grid once the participant completely pays them off.

- To pay sponsoring pledges for the selected participant(s), click **Pay Now** on the action bar. After the selected sponsoring pledges are paid, you return to the Sponsoring Pledges tab of the registrant, guest, or sponsor record. The correct balance appears in the **Balance** column.
- On the registrant, guest, or sponsor record, click **Save and Close** on the toolbar. You return to the event record.
- Click **Save and Close**.

Attributes and Notes on a Registrant, Guest, or Sponsor Record

On the Attributes/Notes tab of a registrant, guest, or sponsor record, you can add multiple attributes and notes for each participant. Participant attributes are useful bits of information that help you identify the qualities, characteristics, and concerns associated with a particular participant. Although you set up attributes from the **Attributes** link of *Configuration*, you can add attributes to a participant record from this tab. Select your attributes from the **Category** column in the Attributes grid and enter information in the **Description**, **Short Desc.**, **Date**, and **Comments** columns. To choose which attributes appear on this tab, filter (sorting by type) the attributes. You can display all attributes or one specific attribute category. For information about attributes, see the *Configuration & Security Guide*.

Examples of attributes you can add for a participant of an event are particular partner requests; special seating requests; special dietary requests; the source, or way you found the participant you invited; whether a participant is likely to participate again in the event; and whether the participant is a candidate for an upgrade in registration fees. The possibilities with attributes are unlimited and can easily be customized for the participants of your event.

For each participant, you can store notes that quickly summarize important information you need to remember. In the **Notes** box, you can enter free-form text about any aspect of your participants. You may decide to keep notes on only those participants who are major donors or sponsors. You may keep notes on individual participants who have a broad range of friends who may be potential registrants for your next event. You can keep notes about the friendliest and most helpful contacts if your participant is an organization. Notes are flexible and have multiple uses.

Mark D. Adamson (Registrant)

File Edit View Participant Tools Help

Save and Close

Registrant: Mark D. Adamson

Registered Events
Summer Series of Fun

- Alta Tennis Tournam...
- Afternoon Tea
- Starlight Concert
- Annual Golf Tournam...

Attributes/Notes

Attribute category: <All Categories>

Category	Description	Short Desc.	Date	Comments
Dietary Preference	Vegetarian		06/22/2006	Strict vegan
Partner Request	Thomas Moorer		06/03/2006	Always golfs with Thom
Source	Last year's roster		06/03/2006	Always participates in t
Shirt Size	Large		06/22/2006	If not quality cotton, XI
Special Requests	Nonsmoking		06/22/2006	Seat in nonsmoking sec

Notes:

Mark has a large array of friends who may be interested in playing in the tournament next year. Ask him when she checks in.

Sporting Event

Once you enter information on the Attributes/Notes tab, click **Save and Close** on the toolbar. You return to the Participants tab of the event record.

Update Participants

You can use the **Update Participants** feature to perform a global change of fields on your participant (registrant, guest, or sponsor) records. Select **Tools, Update Participants** from the menu bar of an event record to globally change selected fields on the General, Travel, Participation, Registration Fees, and Donations tabs. When you globally change selected fields on these tabs, you must use only a participant query to filter the participant records that should be updated. For information about queries, see the Query chapter of the *Query & Export Guide*.

For example, when an event is over, you can use the **Update Participants** feature to update your participant records and mark who attended the event. When you use the **Update Participants** feature to do this, all **Participant has attended** checkboxes are marked on the participant records for the participants you select.

Another example is before an event, you may need to update or change the name of the hotel where your participants stay. You can use the **Update Participants** feature to add or change the lodging **Name** on the General 2 tab of selected participant records.

Yet another example is before you calculate registration fees for your participants, you may decide to change the discount to apply to registration fees on particular participant records. You can change the discount **Amount** on the Registration Fees tab of the selected participants who have **Apply discount** marked on this tab.

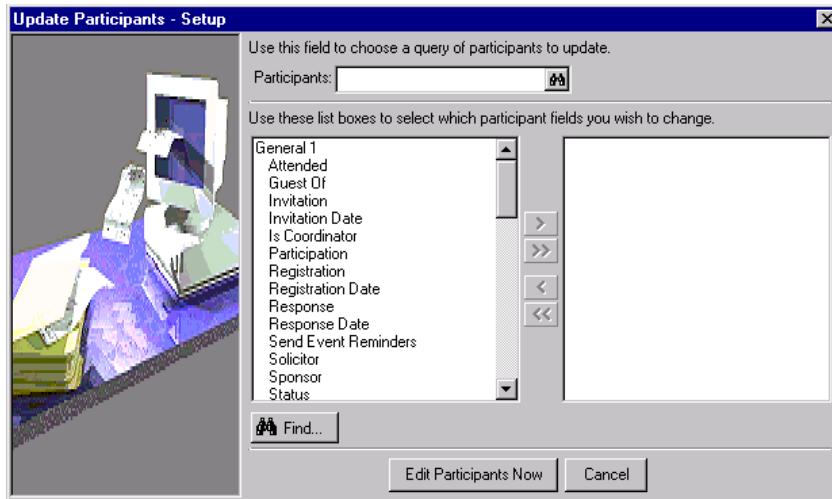
The **Update Participants** feature can save a lot of time when you need to update or change information on multiple participant records.

► Update participants of an event

To update registrant, guest, and sponsor records, select **Tools, Update Participants** from the menu bar of the event record.

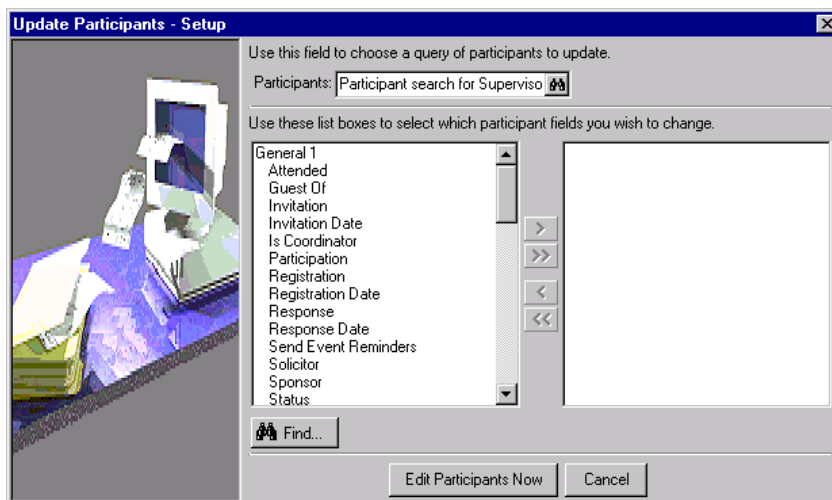
1. On an event record, select **Tools, Update Participants** from the menu bar. For information about how to open an event record, see “Open an event record” on page 10.

The Update Participants - Setup screen appears.



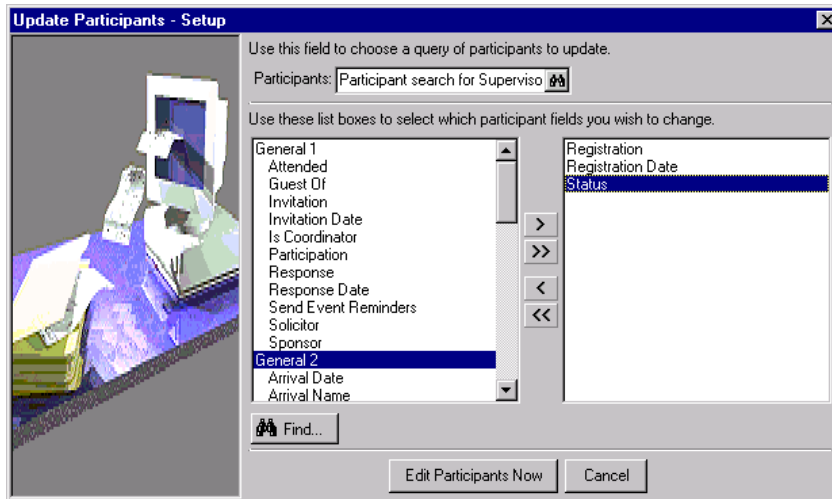
Tip: On a screen with a selection box, you can use the single right and left arrows to move one entry back and forth between the two boxes. You can use the double left or right arrows to move all entries at once.

2. In the **Participants** field, click the binoculars to access the Open screen for queries so you can search for a query of participants to update. For information about queries, see the Query chapter of the *Query & Export Guide*. When found and selected, the query appears in the **Participants** field.



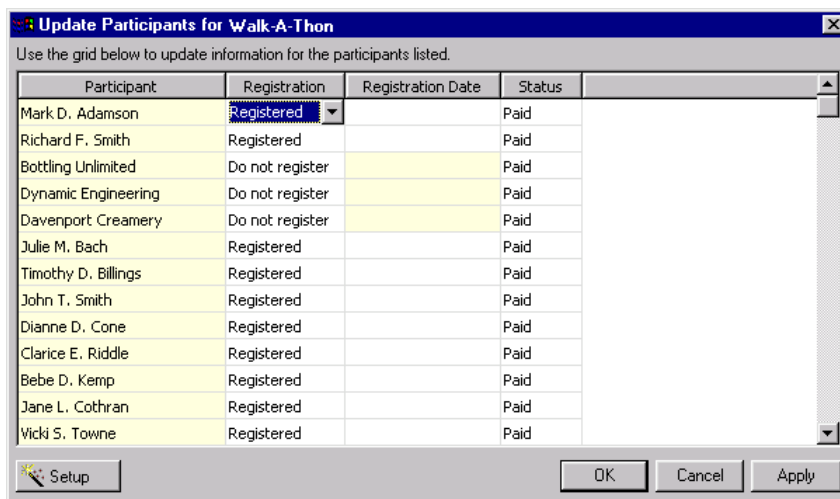
Tip: Because the list of participant fields in the boxes may be lengthy, you can click **Find** to search for a field to move between boxes.

- One at a time, select each participant field to update from the box on the left and use the single right arrow to move it to the box on the right. For information about how to use the selection box, see the *Program Basics Guide*.



Note: On the Update Participants screen, if you decide to add or subtract any participant fields, you can click **Setup**. You return to the Update Participants - Setup screen. Make any necessary selections or changes and click **Edit Participants Now** again. The Update Participants screen reappears so you can continue.

- Once you move the participant fields you want to update to the box on the right, click **Edit Participants Now**. The Update Participants screen appears and lists the participants from the query and the fields selected to update.



- Make necessary changes to the participant fields and click **Apply**. The changes are committed to the database, but you remain on the Update Participants screen.
- When you finish, click **OK**. You return to the event record.
- On the toolbar, click **Save and Close**.

File Edit View Go Favorites Tools Help

Back Forward

Open in separate window

Home

Records

Query

Export

Reports

Mail

Batch

Admin

Config

Scanning

NetSolutions

Dashboard

Calendar of all Events

New Event...

New Action...

Open

Print Calendar

Go to Today

All Events

July 2004

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

				1 ✓ Meeting - L...	2 ✓ 9:00 AM M...	3
4	5	6	7 ✓ 2:00 PM P...	8	9	10 9:00 AM Clas... 8:00 AM Sport...
11 8:00 AM Sport...	12 8:00 AM Sport...	13 8:00 AM Sport...	14 8:00 AM Sport...	15 8:00 AM Sport...	16 8:00 AM Sport...	17 8:00 AM Sport...
18 8:00 AM Sport...	19	20	21	22	23	24
25	26	27	28	29	30 6:00 PM Dinne...	31 7:00 AM Sport...

Jun 2004

S	M	T	W	T	F	S
	1	2	3	4	5	
6	7	8	9	10	11	
13	14	15	16	17	18	
20	21	22	23	24	25	
27	28	29	30			

Aug 2004

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Compl...	Description	Date From	Date To	Start Time	End Time
✓	Walk-A-Thon: 07/01/2004...	07/01/2004	07/01/2004		
✓	Fire Prevention: 07/02/20...	07/02/2004	07/02/2004	9:00 AM	10:00 AM
✓	Alta Tennis Tournament: 0...	07/07/2004	07/07/2004	2:00 PM	3:00 PM
	Fire Prevention	07/10/2004	07/10/2004	9:00:00 ...	1:00:00 PM
	Annual Tennis Tournament	07/10/2004	07/18/2004	8:00 AM	9:00 PM

✓ Actions

✓ Events

Welcome to The Raiser's Edge 7

You can access the Calendar of Events page in several ways. To view all your events on the Calendar of Events page, select **View, Calendar** from the menu bar on the shell of *The Raiser's Edge*, then select **Calendar of All Events**.

To access the Calendar of Events page from an event record, select **View, Calendar** from the menu bar or click **Calendar** on the toolbar. The Calendar of Events page appears and displays that one specific event and its associated actions.

CPR Training Session

File Edit View Event Favorites Tools Help

Save as Columns [Navigation Icons] [Calendar Icon]

Calendar

Name: Session ID: CPRTRAIN

Category: Zoom

Description: Summer CPR class.

Type: CPR Class Schedule: Single class scheduled on 07/09/2005

Group: Public Safety Classes Instructors: Orla A. McGrann

Campaign: Coordinators: Susan E. McDonald

Event goal: \$2,500.00 Location: American Red Cross

Itinerary desc: Adult CPR Class - Summer Seating: Seating has not been set up for this event.

Capacity: 50 No. invited: 100

☐ Event is inactive ☒ Display on 'Calendar of Events'

No. Participants: 50 No. Registered: 50 No. Attended: 0

The Calendar of Events page is divided into five sections.

Calendar of all Events

New Event... New Action... Open Print Calendar Go to Today

All Events July 2004

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1 Meeting - L...	2 9:00 AM: M...	3
4	5	6	7 2:00 PM: P...	8	9	10 9:00 AM: Clas... 8:00 AM: Sport...
11 8:00 AM: Sport...	12 8:00 AM: Sport...	13 8:00 AM: Sport...	14 8:00 AM: Sport...	15 8:00 AM: Sport...	16 8:00 AM: Sport...	17 8:00 AM: Sport...
18 8:00 AM: Sport...	19	20	21	22	23	24
25	26	27	28	29	30 8:00 PM: Dinne...	31 7:00 AM: Sport...

Jun 2004

S	M	T	W	T	F	S
	1	2	3	4	5	
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Aug 2004

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Compl...	Description	Date From	Date To	Start Time	End Time
✓	Walk-A-Thon: 07/01/2004...	07/01/2004	07/01/2004		
✓	Fire Prevention: 07/02/20...	07/02/2004	07/02/2004	9:00 AM	10:00 AM
✓	Alta Tennis Tournament: 0...	07/07/2004	07/07/2004	2:00 PM	3:00 PM
	Fire Prevention	07/10/2004	07/10/2004	9:00:00	1:00:00 PM
	Annual Tennis Tournament	07/10/2004	07/18/2004	8:00 AM	9:00 PM

✓ Actions
✓ Events

The first section is an action bar, with the **New Event**, **New Action**, **Open**, **Print Calendar**, and **Go to Today** buttons. From the Calendar of Events page, you can add a new event or action record. You can open an event or action on the calendar, print the calendar view, and automatically go to today's date.

The second section consists of the large events calendar. The events calendar displays the month selected, with your events and event actions scheduled for that month, appearing on the proper day(s).


The third section, which appears under the calendar, is the Activity List grid. This grid lists each event and event action that appears on the events calendar for your selected month.

The fourth section, on the top right, next to the events calendar, houses the Previous and Next miniature calendars. These two small calendars display the month before and the month after the current month displaying in the large events calendar.



The fifth section, under the miniature calendars, contains the filters for Actions and Events. You can use the filters to determine whether to display actions, events, or both on the events calendar. The sections of the calendar are explained in more detail below.

Events Calendar

The events calendar is the large calendar at the focal point of the Calendar of Events page. When opened, the current month appears on the Events Calendar and the present day appears with a color determined by your *Windows* selected color scheme.


All Events						October 2004 
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1	2 ✓ 6:00 PM: ...
3	4 ✓ Email - C...	5	6 ✓ Mailing - L...	7	8	9 ✓ 9:00 AM: ...
10	11	12	13 ✓ 5:00 PM: ...	14	15	16
17 10:00 AM: S...	18 10:00 AM: S...	19 10:00 AM: S...	20 10:00 AM: S...	21 10:00 AM: S...	22 10:00 AM: S...	23 10:00 AM: S...
24 7:00 PM: Din...	25 6:00 PM: Me...	26 5:00 PM: Din...	27 Mailing - Tha...	28	29	30 8:00 AM: Cla...
31						

The calendar bar, above the events calendar, displays the group header. From the group header, you can filter whether to display all events or a particular group of events on the events calendar. For example, you hold three fundraising events each autumn. You hold a silent auction in September, a tennis tournament in October, and your annual gala in November. On each of these event records, you group them under a common name, Autumn Series of Events. On the events calendar, you can select to view the events and their associated actions, grouped by this name. When you view a group of events, you can see at a glance if any actions or dates conflict.

All Events				October	2004	 	
Dinner				Thursday	Friday	Saturday	
Golf Events					1	2	
Public Safety Classes						✓ 6:00 PM: ...	
Summer Series of Fun				7	8	9	
Volunteer Appreciation						✓ 9:00 AM: ...	
Walk-A-Thon for Relief				14	15	16	
Yearly Gala Balls				21	22	23	
Autumn Series of Events				10:00 AM: S...	10:00 AM: S...	10:00 AM: S...	
				28	29	30	
						8:00 AM: Cla...	
31							

The month and year currently displaying on the events calendar appear in the right corner of the calendar bar. To change the month or year that appears on the events calendar, click the current month or year on the calendar bar and select from the drop-down lists that appear.

All Events				October	2004	 	
Sunday	Monday	Tuesday	Wednesday	May		Saturday	
				June		2	
				July		✓ 6:00 PM: ...	
				August		9	
				September		✓ 9:00 AM: ...	
				October		16	
				November		23	
				December		S... 10:00 AM: S...	
						30	
						8:00 AM: Cla...	

On the right, beside the month and year, two arrows are present.  To view the month prior to your presently selected month, click the arrow pointing to the left. The previous month immediately appears on the calendar, replacing your original selection. To view the month after your presently selected month, click the arrow pointing to the right. The next month appears on the calendar.

Below the calendar bar is the events calendar itself. The calendar displays a single month, determined by your selections of month and year in the calendar bar. The days of the week on the calendar run consecutively from Sunday to Saturday, and the date boxes appear under these days.

For an event and its event actions to appear on the events calendar, you must mark **Display on 'Calendar of Events'** on the General tab of the event record.

Walk-A-Thon

File Edit View Event Favorites Tools Help

Save and Close

Participants Actions Attributes Media Notes

General Prices Expenses Jobs

Name: Walk-A-Thon ID: WALK

Category: ☒ Sporting event ☐ Dinner ☐ Class ☐ Other

Description: This is a 5 kilometer walk that begins and ends at the International Conference Center. There will be a closing ceremony concert performed by the Jazz Sons. Proceeds from this year's walk-a-thon are designated for Disaster Relief.

Type: Fundraiser Start date: 07/31/2007 Start time: 7:00 AM

Group: Disaster Relief Fundraising Events End date: 07/31/2007 End time: 4:00 PM

Campaign: Disaster Relief Campaign Coordinators: Allison E. Andrews

Event goal: \$250,000.00 Location: International Conference Center

Itinerary desc: Nashville Walk-A-Thon Seating: Seating has not been set up for this event

Capacity: 5000 No. invited: 10000

☐ Event is inactive ☒ Display on 'Calendar of Events'

No. Participants: 5000 No. Registered: 500 No. Attended: 0

When this checkbox is marked, and you select to view all events or this one particular event, the event and any actions associated with the event appear in the appropriate date boxes on the calendar. Where an event or event action appears on the calendar depends on whether you enter a **Start Date**, an **End Date**, both, or neither on the event record. If you enter both a **Start Date** and an **End Date**, the event appears on the calendar on each date, on and between the start date and end date. If you enter a **Start Date** and no **End Date**, the event appears on the calendar on the start date. If you enter an **End Date** and no **Start Date**, the event appears on the calendar on the end date. If you do not enter a **Start Date** or an **End Date** on an event record, the event will not appear on the calendar at all.

When an event spans multiple dates, the event lists in each date box of the appropriate month(s) in which the event takes place. For example, if you hold a silent auction and the auction takes place on September 10 and 11, the event lists on both these dates. If an event is a class, each occurrence of the class lists in the appropriate date box of the appropriate month. For example, if you hold a Volunteer Orientation class every Monday in September, the event appears on all Mondays of that month.

All Events September 2005						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1	2	3
4	5 9:00 AM: Cla...	6	7	8	9	10 10:00 AM: Ot...
11 10:00 AM: Ot...	12 9:00 AM: Cla...	13	14	15	16	17
18	19 9:00 AM: Cla...	20	21 9:00 AM: Cla...	22 9:00 AM: Cla...	23 9:00 AM: Cla...	24
25	26 9:00 AM: Cla...	27	28	29	30	

On the events calendar, events appear in date boxes that display the event start time, category, name, and ID. A check mark appears before the event if it is complete.

Note: You cannot fully see the event or action text in a date box of the events calendar. You must hold your cursor (hover) over the event or action text. A tooltip always appears, displaying the full text.

Event actions appear and display the action time, action category, action type, and the event ID. A check mark appears before the action, if it is complete.

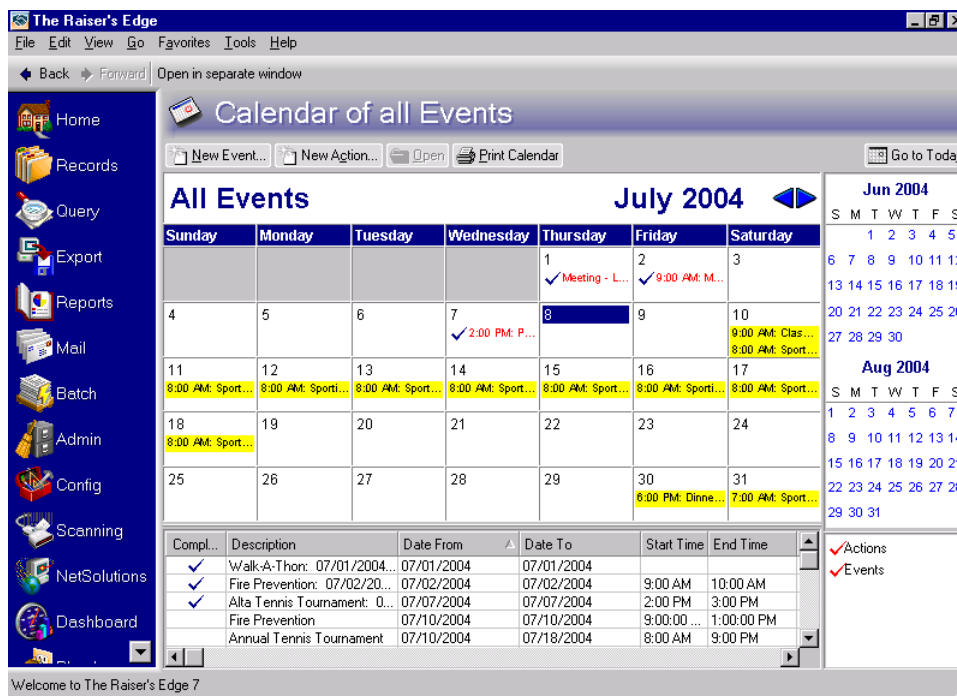
All Events October 2004						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1	2 ✓ 6:00 PM: ...
3	4 ✓ Email - C...	5	6 ✓ Mailing - L...	7	8	9 ✓ 9:00 AM: ...
10	11	12	13 ✓ 5:00 PM: ...	14	15	16
17 10:00 AM: S...	18 10:00 AM: S...	19 10:00 AM: S...	20 10:00 AM: S...	21 10:00 AM: S...	22 10:00 AM: S...	23 10:00 AM: S...
24 7:00 PM: Din...	25 6:00 PM: Me...	26 5:00 PM: Din...	27 Mailing - Tha...	28	29	30 8:00 AM: Cla...
31						

When an event takes place on a certain date, the date box can appear with a color you select. When an event action takes place on a certain date, the action text can appear with a color you select. You must set up these colors in User Options. For information about how to set up these user options, see “Establish calendar colors” on page 18.

Events and event actions appear on the events calendar as links. If you double-click an event or event action inside a date box, that particular event record or event action record opens for viewing or editing, if you have security rights established from the **Security** link of *Administration*.

Activity List Grid

The Activity List grid appears at the bottom of the Calendar of Events page, under the events calendar.



This grid is for informational purposes only and displays all events and event actions that appear on the events calendar for the current month. The information in the grid appears in chronological order. The columns of the grid for both events and event actions are: **Complete**, **Description**, **Date From**, **Date To**, **Start Time**, **End Time**, **Category**, **Type**, and **ID**. You can resize these columns and move their location. When you double-click an event or event action in the grid, that event or event action opens.

Complete	Description	Date From	Date To	Start Time	End Time	Category	Type
✓	Fire Prevention Class: 10/02/...	10/02/2004	10/02/2004	6:00 PM	7:00 PM	Phone Call	Event Remind
✓	Annual Tennis Tournament: 1...	10/04/2004	10/04/2004			Email	Corresponde
✓	Playground Grand Opening Pa...	10/06/2004	10/06/2004			Mailing	Letter
✓	Fire Prevention Class	10/09/2004	10/09/2004	9:00AM	1:00PM	Class	Seminar
✓	Annual Tennis Tournament: 1...	10/13/2004	10/13/2004	5:00 PM	8:00 PM	Meeting	Planning Meet
✓	Annual Tennis Tournament	10/17/2004	10/23/2004	10:00 AM	10:00 PM	Sporting Event	Annual Fundra
✓	Annual Tennis Tournament Aw...	10/24/2004	10/24/2004	7:00 PM	9:00 PM	Dinner	Tennis Tourna
	Playground Grand Opening Pa...	10/25/2004	10/25/2004	6:00 PM	8:00 PM	Meeting	Planning Meet
	Playground Grand Opening Party	10/26/2004	10/26/2004	5:00 PM	10:00 PM	Dinner	Social
	Annual Tennis Tournament: 1...	10/27/2004	10/27/2004			Mailing	Thank You
	CPR Training Session	10/30/2004	10/30/2004	8:00AM	5:00PM	Class	CPR Class

For an event, a check mark appears in the **Complete** column of the Activity List grid if your calendar date is after the **End date** and **End time** specified on the event record. The **Date From** column reflects the **Start date** field on the event record and the **Date To** column reflects the **End date**. **Start Time**, **End Time**, **Category**, **Type**, and **ID** come directly from the event record.

For an event action, a check mark appears in the **Complete** column if the **Action completed on** checkbox is marked on the action record and a date is entered in the accompanying date field, and the current calendar date is after the **Action completed on** date. Both the **Date From** and **Date To** columns reflect the **Action date** field on the action record. **Start Time** and **End Time** reflect the **Start time** and **End time** fields on the action record. **Category** reflects the **Category** option selected on the action record and **Action Type** reflects the **Action type** on the action record. **ID** comes directly from the event record.

Previous and Next Miniature Calendars

The Previous and Next miniature calendars appear in the top right corner beside the events calendar.

The Raiser's Edge

File Edit View Go Favorites Tools Help

Back Forward Open in separate window

Calendar of all Events

New Event... New Action... Open Print Calendar Go to Today

All Events July 2004

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
				1 Meeting - L...	2 9:00 AM: M...	3
4	5	6	7 2:00 PM: P...	8	9	10 9:00 AM: Clas... 8:00 AM: Sport...
11 8:00 AM: Sport...	12 8:00 AM: Sport...	13 8:00 AM: Sport...	14 8:00 AM: Sport...	15 8:00 AM: Sport...	16 8:00 AM: Sport...	17 8:00 AM: Sport...
18 8:00 AM: Sport...	19	20	21	22	23	24
25	26	27	28	29	30 6:00 PM: Dinne...	31 7:00 AM: Sport...

Jun 2004	Aug 2004
S M T W T F S	S M T W T F S
1 2 3 4 5	1 2 3 4 5 6 7
6 7 8 9 10 11 12	8 9 10 11 12 13 14
13 14 15 16 17 18 19	15 16 17 18 19 20 21
20 21 22 23 24 25 26	22 23 24 25 26 27 28
27 28 29 30	29 30 31

Compl...	Description	Date From	Date To	Start Time	End Time
✓	Walk-A-Thon: 07/01/2004...	07/01/2004	07/01/2004		
✓	Fire Prevention: 07/02/20...	07/02/2004	07/02/2004	9:00 AM	10:00 AM
✓	Alta Tennis Tournament: 0...	07/07/2004	07/07/2004	2:00 PM	3:00 PM
	Fire Prevention	07/10/2004	07/10/2004	9:00:00 ...	1:00:00 PM
	Annual Tennis Tournament	07/10/2004	07/18/2004	8:00 AM	9:00 PM

✓ Actions
✓ Events

Welcome to The Raiser's Edge 7

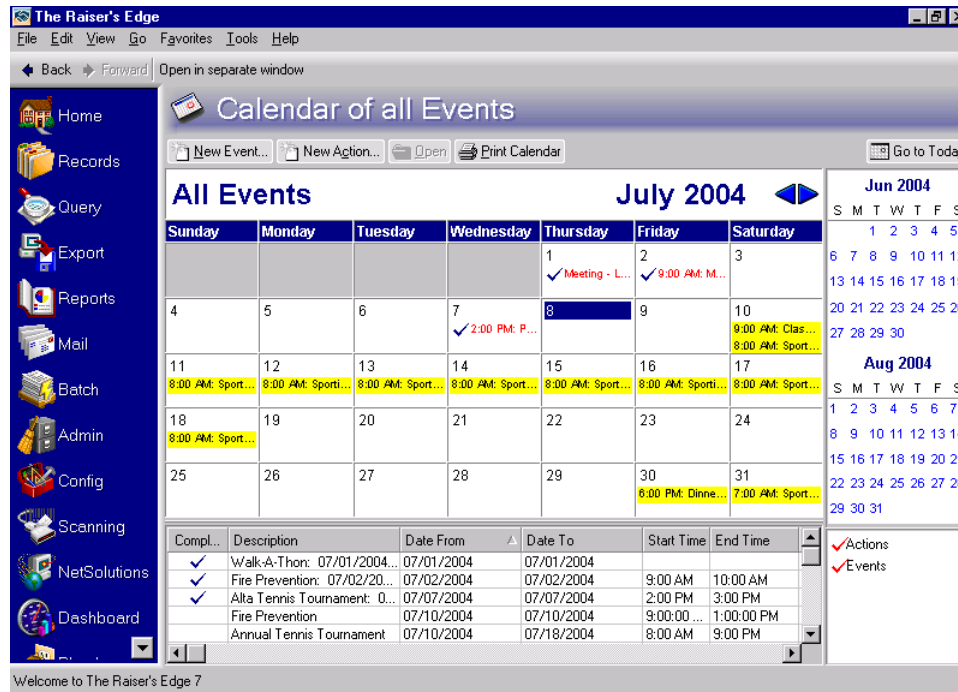
The top, or Previous miniature calendar displays the previous month, which is the month before the current month on your events calendar. For example, if you select to view July on the events calendar, the Previous calendar displays June of the same year. The lower, or Next miniature calendar always displays the next month, which is the month after the current month on the events calendar. For example, if you select to view July on the events calendar, the Next calendar displays August of the same year.

Jun 2004						
S	M	T	W	T	F	S
	1	2	3	4	5	
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			
Aug 2004						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

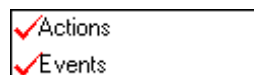
If you click a particular date in the Previous calendar, that month immediately appears on your Events Calendar, and the date you click appears as your selected date. The Previous and Next calendars change accordingly. For example, if you select a date in April on the events calendar, the Previous calendar shows March and the Next calendar shows May. If you then click a date in May, that month immediately appears on your events calendar. The Previous calendar now shows April and the Next calendar shows June. The same thing happens when you click a date in the Previous calendar. That month appears immediately on the events calendar and the Previous and Next calendars change accordingly.

Events and Actions Calendar Filters

The Events and Actions calendar filters appear on the bottom right beside the events calendar.



The filters simply show the words, **Events** and **Actions**, with a check mark beside each.

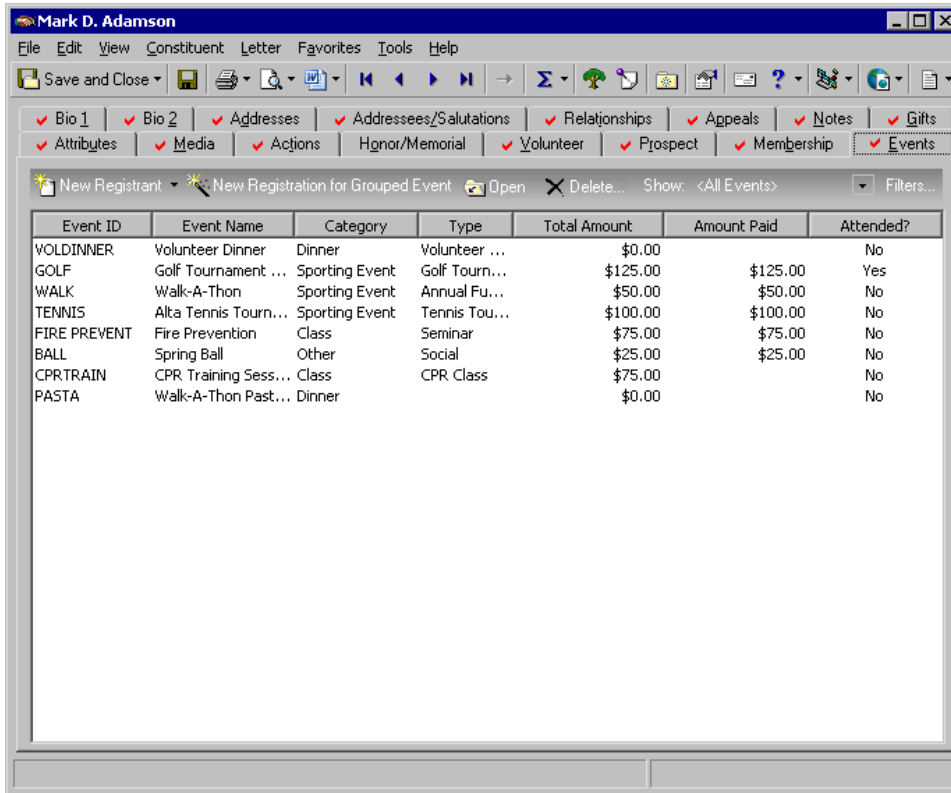


These check marks indicate both events and event actions appear on your events calendar. You can click beside **Events** and **Actions** to uncheck either if you do not want that selection to appear on your events calendar. Once you uncheck **Events** or **Actions**, if you decide you want events or event actions to appear on the calendar, simply click beside **Events** or **Actions** again. The check mark appears.

Events Tab of a Constituent Record

Tip: To have a red check mark appear on the Events tab once you add data, you must set a user option. From User Options, select the Records tab. For individual constituent records, from the tree view on the left, select **Individuals**. Under **Check these tabs for data**, mark the checkbox beside **Events** and any other tabs you want the program to check for data. For organization constituent records, from the tree view, select **Organizations** and mark the appropriate checkboxes. For information about User Options, see the *Program Basics Guide*.

All events a constituent is registered for or has previously registered for list on the Events tab of the constituent record. The **Event ID**, **Event Name**, **Category**, **Type**, **Total Amount**, **Amount Paid**, and whether the constituent attended the event appear in the Events grid on this tab.



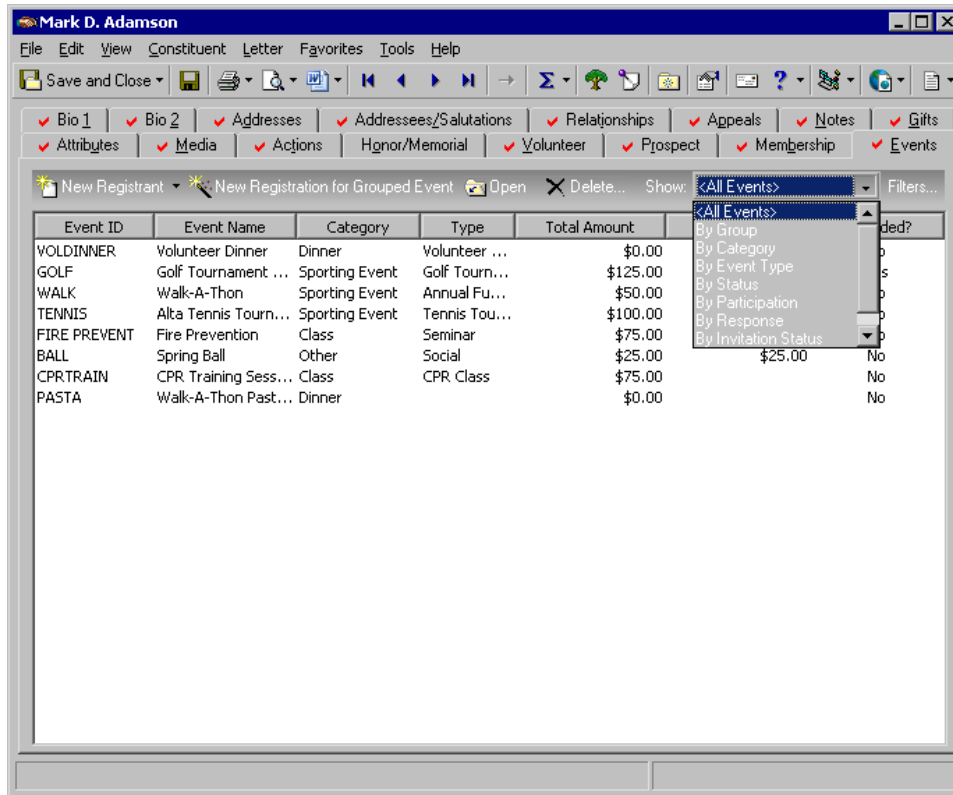
The screenshot shows a software interface for a constituent named Mark D. Adamson. The 'Events' tab is selected, displaying a grid of events. The grid has the following columns: Event ID, Event Name, Category, Type, Total Amount, Amount Paid, and Attended?. The data rows are as follows:

Event ID	Event Name	Category	Type	Total Amount	Amount Paid	Attended?
VOLDINNER	Volunteer Dinner	Dinner	Volunteer ...	\$0.00		No
GOLF	Golf Tournament ...	Sporting Event	Golf Tourn...	\$125.00	\$125.00	Yes
WALK	Walk-A-Thon	Sporting Event	Annual Fu...	\$50.00	\$50.00	No
TENNIS	Alta Tennis Tourn...	Sporting Event	Tennis Tou...	\$100.00	\$100.00	No
FIRE PREVENT	Fire Prevention	Class	Seminar	\$75.00	\$75.00	No
BALL	Spring Ball	Other	Social	\$25.00	\$25.00	No
CPRTTRAIN	CPR Training Sess...	Class	CPR Class	\$75.00		No
PASTA	Walk-A-Thon Past...	Dinner		\$0.00		No

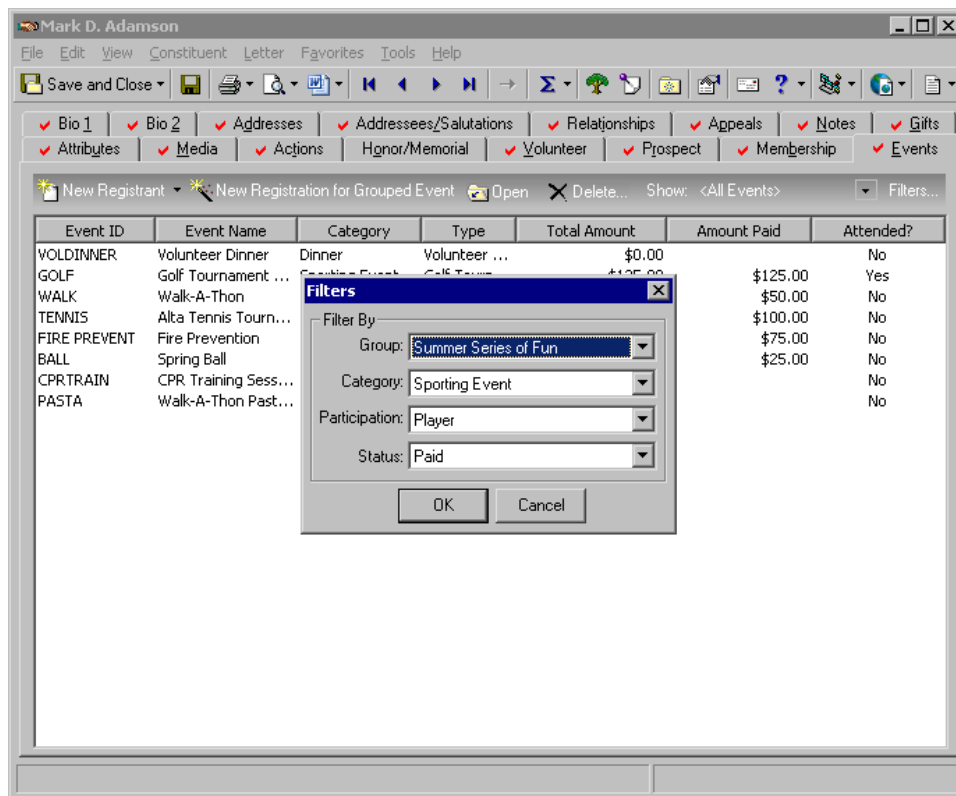
Note: To add and change the columns in the grid on the Events tab, right-click in the grid and select **Columns**. The Columns screen appears. From this screen, select the columns to display.

If you have user rights established from the **Security** link of *Administration*, to open the constituent's participant records to edit or view, select the event in the grid and click **Open** on the action bar above the grid. To delete a participant record, select an event and click **Delete**.

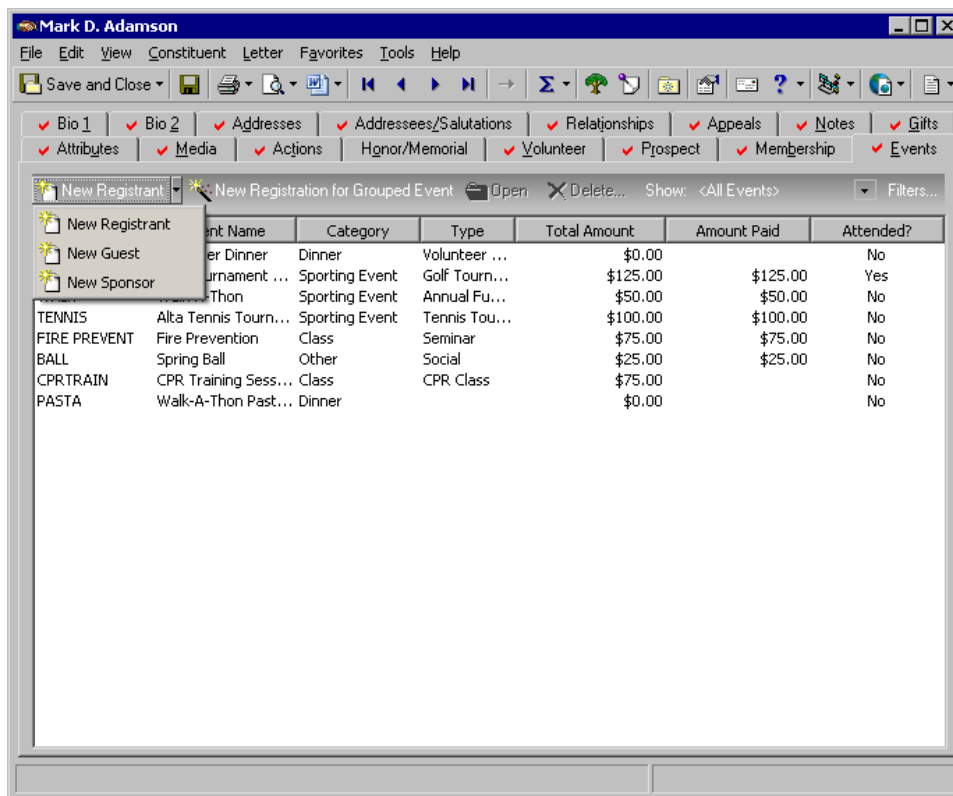
On the Events tab, you can click **Show** on the action bar above the grid to determine what to view in the grid. You can select to view By Group, By Category, By Event Type, By Status, By Participation, By Response, By Invitation Status, and By Registration Status. To view all events the constituent is registered for, past and present, simply select <All Events>.



To further filter what appears in the Events grid, click **Filters** on the action bar and complete the **Group**, **Category**, **Participation**, or **Status** fields on the Filters screen.



To add the constituent as a participant of an event previously added to your database, on the action bar, click the down arrow by **New Registrant**. Select **New Registrant**, **New Guest**, or **New Sponsor** from the list.



The Open screen for events appears so you can search your database for the event to which to add the constituent. Once selected, the **New Registrant**, **New Guest**, or **New Sponsor** screen appears so you can add participant information. The **New Registrant**, **New Guest**, and **New Sponsor** screens are the same screens that appear when you add a participant from the Participants tab of an event record.

To register the constituent for a group of events at once, click **New Registration for Grouped Events** on the action bar. For information about how to register a participant for a grouped event, see “Multiple Registration for Grouped Events” on page 211.

For information about how to add participant records, see “Add Participants” on page 123.

Multiple Registration for Grouped Events



Grouped Event Participant Registration	212
Grouped Event Registration Wizard Welcome Screen	218
Select Events Screen	223
Registration Options Screen	223
Pay Registration Fees Screen	224
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Input Guests and Assign Seating Screen	230
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Procedures

Registering participants for a grouped event	212
Selecting a participant to register for grouped events	218
Selecting the events the participant will attend	223
Completing the Registration Options screen	224
Calculating the registration fees for each event	225
Linking the sum of the registration fees to a single gift	227
Entering general participant information for the grouped events	229
Entering the participant’s guest and seating information for each event	230

Note: From the record of a grouped event, you can easily access the record of another event in the same group. From the menu bar, select **Event, Grouped Events** and select the desired event.

With the optional module *Event Management*, you can manage all aspects of grouped events. A grouped event is an event that includes multiple functions. For example, your organization may have an annual homecoming weekend, which includes many different functions such as a golf tournament, a dinner gala, and multiple class reunions.

Grouped Event Participant Registration

Warning: To use the Grouped Event Registration Wizard, you must use the **Group** field on the General tab of the event records to assign each event to a shared group. For information about how to assign an event to a group, see “Categories and General Information” on page 19.

Participants of a grouped event are divided into three types — registrants, guests, and sponsors. With the Grouped Event Registration Wizard, you can easily register a participant for multiple functions within a grouped event at once. Before you can register a participant for grouped events, make sure the event records are created and are assigned an event ID and a group. For information about how to set up an event record and assign it to a group, see “Categories and General Information” on page 19.

► Register participants for a grouped event

When you register a participant for a grouped event, you can use the Grouped Event Registration Wizard to easily register the participant for multiple functions at once within the grouped event.

1. On the Raiser’s Edge bar, click **Records**.
2. Click **Events**. The Events page appears.

Note: To exit the Grouped Event Registration Wizard without registering the participant, click **Cancel** from any Grouped Event Registration Wizard screen. If you cancel the registration, the program retains changes made to general information. For items such as guests, fees, and seating, the program removes items added during the registration but does not restore any removed or modified items.

3. Click **New Registration for Grouped Event**. The Grouped Event Registration Wizard welcome screen appears. From the Grouped Event Registration Wizard welcome screen, select the participant to register and the group of events the participant will attend. For information about this screen, see “Grouped Event Registration Wizard Welcome Screen” on page 218.

Note: If, on the Grouped Events Registration Wizard welcome screen, you select a **Group** that does not have any events, a message appears to inform you no events are available for that group. Click **OK** and have the Events Coordinator set up the events as necessary.

4. Click **Next**. The Select Events screen appears. From the Select Events screen, select which events in the group the participant will attend. If the participant is already registered for an event in the group, its checkbox is disabled. For information about this screen, see “Select Events Screen” on page 223.

5. Click **Next**. The Registration Options screen appears.

6. On the Registration Options screen, select whether and how to pay the participant's registration fees. Also, select whether to enter the participant's guest and seating information at this time. For information about this screen, see “Registration Options Screen” on page 223.
7. Click **Next**.
 - If, on the Registration Options screen, you mark **Pay registration fees**, the Pay Registration Fees screen appears. Go to step 8.

- If, on the Registration Options screen, you did not mark **Pay registration fees**, the Input General Participant Information screen appears. Go to step 12.
8. On the Pay Registration Fees screen, calculate the participant's registration fees for each event. Also, apply any discounts or benefits to the registration fees. If, on the Registration Options screen, you select to **Link some or all of the registration fees for each event to separate gifts**, link the registration fees to a gift record.

The screenshot shows the 'Grouped Event Registration Wizard' window with the title bar 'Grouped Event Registration Wizard'. The main title is 'Pay Registration Fees' and the subtitle is 'Alta Tennis Tournament'. Below the title is a table with the following data:

Unit	No. U...	Gift Amo...	Receipt Amount	Date	Comment
Double	2	\$350.00	\$200.00	08/24/2007	

Below the table, there are several input fields and buttons:

- ☒ Apply discount
- ☐ Amount ☒ Percent
- Percent:
- Total gift amount: \$630.00
- Benefits: Total benefit value: \$0.00
- Amount paid:
- Date paid:
- Total receipt amount: \$400.00
- Link to Gift button
- Grand total of registration fees: \$630.00
- < Back button
- Next > button
- Close button

At the bottom, there is a text box that says 'Press F7 for calculator'.

The Pay Registration Fees screen appears for each selected event in the group. For more information about this screen, see "Pay Registration Fees Screen" on page 224.

9. Click **Next**.
- If, on the Registration Options screen, you select **Link the sum of all registration fees to a single gift**, the Amount to Apply to Registration Fees screen appears. Go to step 10.
 - If, on the Registration Options screen, you select **Link some or all of the registration fees for each event to separate gifts** or **Do not link registration fees to gifts at this time**, the Input General Participant Information screen appears. Go to step 12.

10. On the Amount to Apply to Registration Fees screen, link the total amount of the participant's registration fees to a single gift record. Also, specify how much of the gift amount to apply to each event. For more information about this screen, see "Amount to Apply to Registration Fees Screen" on page 227.

Grouped Event Registration Wizard

Amount to Apply to Registration Fees

The total amount of registration fees for Robert C. Hernandez is \$165.00

Indicate how much of the gift amount should be applied to this participant

Amount to apply to this participant:

Gift Amount: \$0.00 Available to Apply: \$0.00

The following amounts will be applied to each event's registration fees:

Event	Fees	Applied Amount
Afternoon Tea	\$135.00	
Starlight Concert	\$30.00	

< Back Next > Cancel

11. Click **Next**. The Input General Participant Information screen appears.
12. On the Input General Participant Information screen, enter information about the participant for each event. You can specify the participant's participation role, invitation and registration status, and additional status information that is useful for your organization. The information you enter on this screen appears on the participant record for the grouped events. For information about this screen, see "Input General Participant Information Screen" on page 229.

Grouped Event Registration Wizard

Input General Participant Information

Event	Participation	Status	Invite?	Invite Date	Registration	Registratic
All	Attendee	▼	Invited	02/02/2007	Not registered	
Aftern...	Attendee		Invited	02/02/2007	Not registered	
Starlig...	Attendee		Invited	02/02/2007	Not registered	

< Back Next > Cancel

Press F7 for table lookup

13. Click **Next**.

- If, on the Registration Options screen, you mark **Assign guests and seating**, the Input Guests and Assign Seating screen for the first selected event in the group appears. Go to step 14.
- If, on the Registration Options screen, you did not mark **Assign guests and seating**, the Summary Info screen appears. Go to step 16.

Note: If necessary, you can input the guest information and assign the participant's seating for the event at a later time. To skip this screen, click **Next**.

14. On the Input Guests and Assign Seating screen, assign the participant's seating for the event and enter information about any guests the participant may bring to the event.

Grouped Event Registration Wizard



Input Guests and Assign Seating

Assign guests and seating, if applicable. Can also perform these tasks at a later time.

Afternoon Tea

Seating Seat: Not yet assigned

☐ Do not seat this participant

Seating group:  

Group/seating notes:

Add Guest(s)

< Back Next > Cancel

The Input Guests and Assign Seating screen appears for each selected event in the group. For information about this screen, see “Input Guests and Assign Seating Screen” on page 230.

15. Click **Next**. The Summary Info screen appears.

16. On the Summary Info screen, a list of the events in the group the participant is registered, registration details for each event, and the amount of the **Total registration fees** appears. For information about this screen, see “Summary Info Screen” on page 233.

If the participant’s registration for the grouped events is incorrect, click **Back** and adjust the registration as necessary.

17. To commit the registration to the database, click **Commit**. When you click **Commit**, the participant’s registration and any new or updated participant information is committed to the database. After the registration is committed to the database, the Registration Wizard completed screen appears.

18. To open the participant record to add more information, mark **Open the participant record to input more detail**.

19. Click **Finish**.

Note: If, in Business Rules, you mark **Allow multiple constituent registration** and a participant has multiple registrations for the same event, the **Registered Events** box displays multiple entries for the event on the participant record.

- If you mark **Open the participant record to input more detail**, the participant record opens.
- If you did not mark **Open the participant record to input more detail**, you return to the Events page.

Grouped Event Registration Wizard Welcome Screen

On the Grouped Event Registration Wizard welcome screen, you select the participant to register for the grouped events. You can select the participant from the database or add a new participant record. On the welcome screen, you also select the group of events the participant will attend.

► Select a participant to register for grouped events

1. On the Events page, click **New Registration for Grouped Event**. The Grouped Event Registration Wizard welcome screen appears.

2. Select whether the participant is an individual or organization.

Note: On the Open screen, if the criteria fields do not provide enough search criteria options, you can use the **Search using query** field to further filter your results. For information about how to use this field, see the *Program Basics Guide*.

3. In the **Name** field, click the binoculars or press **F7** on your keyboard. The Open screen for Constituents appears.

Warning: The results that appear in the grid must match all criteria you enter. Therefore, we recommend you search by only one or two of the most helpful criteria types. If you add too much criteria information in the **Find Constituents that meet these criteria** fields, you can prevent the program from finding the constituent.

4. Under **Find Constituents that meet these criteria**, decide what criteria to use to search for your constituent and select the information in the appropriate criteria fields. The criteria you can use include the **Last/Org name**, **First name**, **Constituent ID**, Social Security number (**SSN**), **Membership ID**, **Bank acct. no.**, **Address lines**, **City**, **State**, **ZIP**, **Class of**, and **Credit card no.**

You can also select whether to **Display inactive constituents**, **Display deceased constituents**, **Check spouse name**, **Check aliases**, **Check contact name**, **Check nickname**, or search for an **Exact match only**.

Note: If you do not know the correct spelling or number, you can enter the first few characters in the **Find Constituents that meet these criteria** fields. For information about how to use these fields, see the *Program Basics Guide*.

5. Click **Find Now**. If the search criteria entered matches a constituent in the database, it appears in the grid on the Open screen. Depending on how limited or detailed your criteria are, the program may find multiple records.

The 'Open' window displays search results in a grid. The first row shows a constituent named Robert C. Hernandez, located at 410 17th St, Denver, CO, with a Constituent ID of 96. Below the grid, the 'Find Constituents that meet these criteria' section shows the search criteria: Last/Org name: Hernandez, First name: Robert, City: Denver, CO, State: CO, ZIP: 80202, and Class of: Constituent. The 'Find Now' button is highlighted.

Constituent Name	Address Block	City, State	Constituent ID
Robert C. Hernandez	410 17th St	Denver, CO	96

Find Constituents that meet these criteria:

Last/Org name: Hernandez Address lines: City: Denver, CO State: CO ZIP: 80202 Class of: Constituent

First name: Robert

Constituent ID: SSN: Membership ID: Bank acct. no.: Credit card no.:

☒ Display inactive constituents ☐ Check spouse name ☐ Exact match only ☐ Check nickname
☐ Display deceased constituents ☐ Check aliases ☐ Check contact name

Buttons: Open, Cancel, Add New, Options, Find Now, New Search, Previous Search, Expand Results.

6. In the grid, select the constituent to register for the grouped events and click **Open**. You return to the Grouped Event Registration Wizard welcome screen. Go to step 11.

If the participant does not appear in the grid, you can add the participant to the database. On the Open screen, click **Add New** and select **Constituent** or **Nonconstituent**.

The 'Open' window shows the 'Add New' button with a dropdown menu open, displaying 'Constituent' and 'Nonconstituent' options. The search criteria section is empty, and the 'Find Now' button is visible.

Find Constituents that meet these criteria:

Last/Org name: Address lines: City: State: ZIP: Class of:

First name: SSN: Membership ID: Bank acct. no.: Credit card no.:

☒ Display inactive constituents ☐ Check spouse name ☐ Exact match only ☐ Check nickname
☐ Display deceased constituents ☐ Check aliases ☐ Check contact name

Buttons: Open, Cancel, Add New, Options, Find Now, New Search, Previous Search, Expand Results.

Note: For information about how to create a new constituent record, see the *Constituent Data Entry Guide*.

- If you select **Constituent**, the New Individual screen or New Organization screen appears so you can create a constituent record for the participant. After you enter the constituent's information on the New Individual screen or New Organization screen, click **Save**. The Participant Biographical Information screen appears. Go to step 7.
 - If you select **Nonconstituent**, the Participant Biographical Information screen appears so you can create a participant record. Go to step 9.
7. On the Participant Biographical Information screen, if the participant is a constituent in the database, the program automatically populates the **Biographical** and **Preferred Address** frames and **Phones/Email/Links** grid. Update the information that appears as necessary.
 8. Click **Save and Return to Wizard**. You return to the Grouped Event Registration Wizard welcome screen. Go to step 11.

The screenshot shows the "Participant Biographical Information" window. The "Biographical" section contains the following fields: Last Name: Hernandez, First name: Robert, Middle name: Carlos, Titles: Dr., Suffixes: (empty), and ID: 238. The "Preferred Address" section contains: Country: United States, Address lines: 410 17th Street, City: Denver, State: CO (Colorado), ZIP: 80202-4402, and DPC: 99. The "Phones/Email/Links" grid is populated with two rows: Home (303-555-3301) and Beeper (303-555-2000).

DNC	Type	Number/Email Address
	Home	303-555-3301
	Beeper	303-555-2000

9. On the Participant Biographical Information screen, if the participant is a nonconstituent, enter the participant's information.

This screenshot is identical to the one above, showing the "Participant Biographical Information" window with the same data for Robert Hernandez. The fields and the "Phones/Email/Links" grid are populated exactly as in the previous image.

DNC	Type	Number/Email Address
	Home	303-555-3301
	Beeper	303-555-2000

In the **Biographical** frame, enter the participant's **Last Name**, **First name**, **Middle name**, **Titles**, and **Suffixes**.

If the participant has an alias, click **Aliases** and enter it in the Aliases screen that appears. When you search the database for participants, you can search by the alias when you mark **Check aliases** on the Open screen.

In the **Preferred Address** frame, enter the participant's address and mailing information.

In the **Phones/Email/Links** grid, enter the participant's phone numbers, other numbers, and email addresses.

Warning: When you click **Save and Return to Wizard**, no new or updated participant information is committed to the database. The information is saved only for the use of the Grouped Event Registration Wizard. New and updated information is committed only when the registration is completed.

10. Click **Save and Return to Wizard**. You return to the Grouped Event Registration Wizard welcome screen.

Warning: You cannot change the selected constituent name. If you need to adjust the selected name such as to select a different constituent, you must click **Cancel**. You return to the Events page so you can initiate the Grouped Event Registration Wizard again.

11. In the **Name** field, the name of the selected participant appears and the binoculars icon is replaced by ellipsis. If you click the ellipsis, the Participant Biographical Information screen for the participant appears so you can edit or change the selected name.

12. In the **Group** field, select the group of events to which to register the participant. You can select any group that is entered in the **Group** field on the General tab of an event record in the database. The group you select is saved as the default group used for future grouped event registrations during your session in *The Raiser's Edge*.

Note: If, on the Grouped Events Registration Wizard welcome screen, you select a **Group** that does not have any events, a message appears to inform you there are no events available for that group. Click **OK** and have the Events Coordinator set up the events as necessary.

13. Click **Next**. The Select Events screen appears. For information about the Select Events screen, see "Select Events Screen" on page 223.

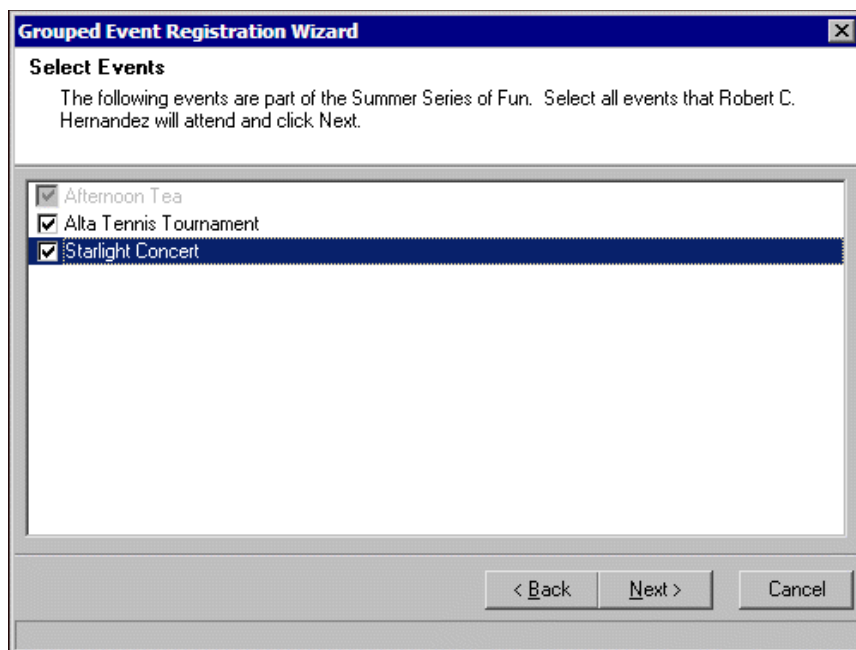
Select Events Screen

The Select Events screen lists, in alphabetical order, the events associated with the **Group** selected on the Grouped Event Registration Wizard welcome screen. If the participant is already registered for an event in the selected group, the event appears in the list but is disabled. On the Select Events screen, you select which events in the selected group the participant will attend.

► Select the events the participant will attend

Note: If the participant is already registered for an event in the group, its checkbox is marked and disabled.

1. On the Select Events screen, mark the checkboxes next to the events to which to register the participant.



2. Click **Next**. The Registration Options screen appears. For information about the Registration Options screen, see “Registration Options Screen” on page 223.

Registration Options Screen

Registration fees are the amounts of money your organization charges for the levels, or units, of participation for an event. For example, if you host an Afternoon Tea, you can have two units of registration fees, one for adults and one for children. On the Registration Options screen, you can select whether to link the participant’s registration fees to one or more gift records. You can also select whether to assign the participant and any guests seating arrangements.

► **Complete the Registration Options screen**

1. On the Registration Options screen, if the participant paid registration fees for events in the group, mark **Pay registration fees**. When you mark this checkbox, the options below it are enabled.

2. If you mark **Pay registration fees**, select whether and how to link the registration fees to constituent gifts.
 - To link the sum of all registration fees to one constituent gift record for the group of events, select **Link the sum of all registration fees to a single gift**.
 - To link the registration fees for each event to separate constituent gift records, select **Link some or all of the registration fees for each event to separate gifts**.
 - To not link registration fees to constituent gift records at this time, select **Do not link registration fees to gifts at this time**. If you select this option, you can link registration fees for each event to constituent gift records after you register the participant.
3. To assign guests and seating for the participant at each event, mark **Assign guests and seating**. If you do not mark this checkbox, you can assign guests and seating for each event after you register the participant.
4. Click **Next**.
 - If, on the Registration Options screen, you mark **Pay registration fees**, the Pay Registration Fees screen for the first selected event in the group appears. For information about the Pay Registration Fees screen, see “Pay Registration Fees Screen” on page 224.
 - If, on the Registration Options screen, you did not mark **Pay registration fees**, the Input General Participant Information screen appears. For information about the Input General Participant Information screen, see “Input General Participant Information Screen” on page 229.

Pay Registration Fees Screen

If, on the Registration Options screen, you select to **Pay registration fees**, the Pay Registration Fees screen appears for each event in the group. On the Pay Registration Fees screen, you can calculate the registration fees for the participant for that event. You can also apply any discounts or benefits to the registration as well. Benefits are gifts your organization gives to participants of an event when they donate a certain amount of money or pay for a certain unit of registration fee prices.

If, on the Registration Options screen, you select **Link some or all of the registration fees for each event to separate gifts**, you can also link the event's registration fees to separate gift records from the Pay Registration Fees screen.

► **Calculate the registration fees for each event**

For each event in the group, you can manually calculate the registration fees for the participant on the Pay Registration Fees screen.

1. At the top of the Pay Registration Fees screen, the name of the event for which you calculate the registration fees appears.

Note: You establish the units of registration fees on the Prices tab of the event record. For information about how to establish prices, see “Set up registration fee prices for an event” on page 105.

In the **Unit** column of the grid, select the units of registration fees the participant has paid for that event. For example, for a dinner event, you may have “Adult” and “Child” units. For a tennis tournament, you may have “Double”, “Single”, and “Family” units.

2. In the **No. Units** column, enter the quantity of each unit the participant purchases. When you tab out of the **No. Units** column, the amounts automatically appear in the **Gift Amount** and **Receipt Amount** columns, using the amounts you establish for the unit on the Prices tab of the event record.
3. In the **Date** column, enter the date you add the registration information.
4. In the **Comments** column, enter any additional information about the registration fees for the participant.

Note: Discounts are not applied to the **Receipt Amount**. The **Total Receipt Amount** for the event's registration fees appears under the **Date paid** field.

5. To apply a discount, or an amount to be subtracted, to the total gift amount of the registration fees for the event, mark **Apply discount**. The **Apply discount** frame is enabled.
 - To discount the gift amount a certain amount of the registration fees, select **Amount** and, in the **Amount** field, enter the amount to discount.
 - To discount the gift amount a certain percentage of the registration fees, select **Percent** and, in the **Percent** field, enter the percentage to discount.

Under **Apply discount**, the **Total gift amount** displays the gift amount after the discount is applied.

Note: For each unit of registration fee prices, you can set up default benefits on the Prices tab of the event record. For information about how to set up default benefits for units of registration fee prices, see “Add benefits for each unit in the Prices grid” on page 106.

6. To add or waive benefits for the participant, click **Benefits**. The Benefits screen appears.

Benefits for Robert C. Hernandez

Use the grid to enter benefits for this participant. In the event that a gift is linked to this participant, the benefits can be loaded on the gift as well.

☐ Waive benefits

Benefit	Count	Unit Cost	Total Benefit/Value	Sent/Fulfilled	Comments
Calendar	1	\$10.00	\$10.00	06/23/2006	

Total: \$10.00

Notes:

OK Cancel

If you do not want the default benefits for the unit of registration fee prices to apply to the participant, mark **Waive benefits** and click **OK**. You return to the Pay Registration Fees screen.

To add benefits for the participant, in the **Benefits** column of the first empty row, select the benefit. For example, you can select “Calendar”, “T-shirt”, or “Coffee mug”.

- a. In the **Count** column next to the selected benefit, enter the quantity of the benefit the participant receives. For example, if the constituent receives one calendar, enter “1”.
 - b. In the **Unit Cost** column of the same row, enter the amount the benefit costs your organization. After you enter the **Count** and **Unit Cost**, the total benefit amount automatically appears in the **Total Benefit/Value** column. The total benefit amount equals the **Count** multiplied by the **Unit Cost**.
 - c. In the **Sent/Fulfilled** column of the same row, enter the date you give the benefit to the participant.
 - d. In the **Comments** column of the same row, enter any additional information about the benefit. For example, if you provide participants of a walk-a-thon a T-shirt, you can enter “Pick up at event”.
 - e. In the **Notes** box, enter any notes to keep about the benefits provided to the participant.
 - f. Click **OK**. You return to the Pay Registration Fees screen.
7. If, on the Registration Options screen, you select **Link some or all of the registration fees for each event to separate gifts**, the **Amount paid** and **Date paid** fields are enabled.

In the **Amount paid** field, enter the amount the participant paid for the event’s registration fees. To use a calculator to enter the amount, click the calculator.

In the **Date paid** field, enter the date on which the participant paid the event’s registration fees. To use a calendar to enter the date, click the calendar.

8. If, on the Registration Options screen, you select **Link some or all of the registration fees for each event to separate gifts**, the **Link to Gift** button appears so you can link the event’s registration fees to separate gift records. To link the registration fees to a gift record, click **Link to Gift**. The Open screen appears and lists the constituent gift records of the participant. For information about how to link registration fees to a gift record, see “Link registration fees to a constituent gift” on page 169.

Note: When an event’s registration fees are linked to a constituent’s gift record, on the Pay Registration Fees screen, the **View Gifts** button appears instead of the **Link to Gift** button.

9. Click **Next**.

- If you need to calculate registration fees for the participant for another event in the group, the Pay Registration Fees screen for the next selected event in the group appears. You must perform this procedure for each selected event the group. In the **Grand total of registration fees** field, the sum of the registration fees paid for all the events in the group appears.
- If registration fees have been calculated for each event in the group and, on the Registration Options screen, you select **Link the sum of all registration fees to a single gift**, the Amount to Apply to Registration Fees screen appears. For information about the Amount to Apply to Registration Fees screen, see “Amount to Apply to Registration Fees Screen” on page 227.
- If registration fees have been calculated for each event in the group and, on the Registration Options screen, you select **Link some or all of the registration fees for each event to separate gifts** or **Do not link registration fees to gifts at this time**, the Input General Participant Information screen appears. For information about the Input General Participant Information screen appears, see “Input General Participant Information Screen” on page 229.

Amount to Apply to Registration Fees Screen

If, on the Registration Options screen, you select **Link the sum of all registration fees to a single gift**, the Amount to Apply to Registration Fees screen appears. From this screen, you can link the sum of the selected events’ registration fees for the participant to a gift record. You can also specify how much of the gift to apply to each event’s registration fees.

► Link the sum of the registration fees to a single gift

1. At the top of the Amount to Apply to Registration Fees screen, the total amount of the registration fees for the participant appears.

Grouped Event Registration Wizard

Amount to Apply to Registration Fees

The total amount of registration fees for Robert C. Hernandez is \$165.00

Indicate how much of the gift amount should be applied to this participant

Amount to apply to this participant:

Gift Amount: \$0.00 Available to Apply: \$0.00

The following amounts will be applied to each event's registration fees:

Event	Fees	Applied Amount
Afternoon Tea	\$135.00	
Starlight Concert	\$30.00	

< Back Next > Cancel

Note: On the Open screen, to create a new gift record for the participant, click **Add New**. For information about how to add a gift record, see the *Program Basics Guide*.

- To link the total amount to a single gift associated with the participant, click **Link to Gift**. The Open screen appears and lists the gift records of the participant.

The 'Open' window displays a list of gift records for Robert C. Hernandez. The table below shows the data visible in the window:

Constituent Name	Gift Date	Gift Type	Gift Amount	Acquisition
Robert C. Hernandez	04/08/2008	Cash	\$200.00	Acquisition
Robert C. Hernandez	07/30/2007	Gift-in-Kind	\$500.00	2002 M
Robert C. Hernandez	01/27/2007	Stock/Property	\$10,000.00	Preside
Robert C. Hernandez	12/01/2006	Planned Gift	\$2,500,000.00	Preside
Robert C. Hernandez	05/13/2006	Stock/Property (Sold)	\$2,000.00	Smith-H
Robert C. Hernandez	02/01/2006	Recurring Gift Pay-Cash	\$100.00	Smith-H
Robert C. Hernandez	01/13/2006	Cash	\$450.00	2006 M
Robert C. Hernandez	10/08/2005	Cash	\$50,000.00	Natura
Robert C. Hernandez	10/08/2005	Cash	\$700.00	Natura
Robert C. Hernandez	08/18/2005	Cash	\$100.00	Natura

Below the table, there are search criteria fields: Last/Org name (Hernandez), First name (Robert), Constituent ID, and SSN. There are also checkboxes for 'Display inactive constituents', 'Display deceased constituents', 'Check spouse name', 'Check aliases', 'Exact match only', and 'Check nickname'. Buttons on the right include 'Open', 'Cancel', 'Add New', 'Options', 'Find Now', 'New Search', 'Previous Search', and 'Expand Results'.

- In the grid, select the gift record to link to the registration fees.

The gift you select may have a Gift Amount larger than the total of the registration fees. For example, your organization may receive a split gift to pay for registration fees and an additional donation.

Warning: If the selected gift does not provide sufficient funds to pay the registration fees, click **Break Link** to select another gift or **Back** to adjust the selected event registration. To view the record for the selected gift, click **View Gift**.

- Click **Open**. You return to the Amount to Apply to Registration Fees screen, and the **Break Link** and **View Gift** buttons appears.

The 'Grouped Event Registration Wizard' window shows the 'Amount to Apply to Registration Fees' screen. It displays the total amount of registration fees for Robert C. Hernandez as \$180.00. Below this, there is a section to indicate how much of the gift amount should be applied to this participant. The 'Amount to apply to this participant' is set to \$180.00. There are buttons for 'Break Link' and 'View Gift'. Below this, the 'Gift Amount' is \$180.00 and the 'Available to Apply' is \$180.00. There is an 'Auto Distribute' button. The following amounts will be applied to each event's registration fees:

Event	Fees	Applied Amount
Afternoon Tea	\$150.00	\$150.00
Starlight Concert	\$30.00	\$30.00

At the bottom, there are buttons for '< Back', 'Next >', and 'Cancel'. A footer note says 'Press F7 for calculator'.

5. In the **Amount to apply to this participant** field and **Gift Amount** field, the amount of the selected constituent gift appears. In the **Available to Apply** field, the amount of the gift that can be applied to the registration fees appears.

Warning: You can choose to not apply the gift to the registration fees at this time. If you do not apply the gift to the registration fees, the **Applied Amount** will be \$0.00. To complete the registration, you must apply a gift to the registration fees from the participant record at a later time.

The grid displays each event and the registration fees for each. In the **Applied Amount** column, enter how much of **Available to Apply** amount to apply to each event. To automatically enter the amount of the **Fees** in the **Applied Amount** column, click **Auto Distribute**.

6. Click **Next**. The Input General Participant Information screen appears. For information about the Input General Participant Information screen, see "Input General Participant Information Screen" on page 229.

Input General Participant Information Screen

On the Input General Participant Information screen, you enter general information about the participant in regards to the selected events. You can specify the participant's participation role, invitation and registration status, and additional status information that is useful for your organization. The information you enter on this screen appears on the participant record.

► Enter general participant information for the grouped events

1. On the Input General Participant Information screen, the **Event** column of the grid displays the events in the group for which the participant is registered.

Event	Participation	Status	Invite?	Invite Date	Registration	Registratic
All	Attendee		Invited	02/02/2007	Not registered	
Aftern...	Attendee		Invited	02/02/2007	Not registered	
Starlig...	Attendee		Invited	02/02/2007	Not registered	

< Back Next > Cancel

Press F7 for table lookup

The first row of the grid is for **All** events. If participant information is true for all the events displayed, enter the information in the first row of the grid.

In the **Participation** column, select the participant's role in each event. For example, you can select "Attendee", "Coordinator", or "Captain". If the participant's role is the same for **All** events, select the **Participation** in the first row of the grid.

2. In the **Status** column, enter the participant's **Status** for each event. This field may be used in any way that is best for your organization. For example, you can use it to record the participant's Paid or Not paid status. If the participant's status is the same for **All** events, select the **Status** in the first row of the grid.
3. In the **Invite?** column, indicate whether you sent the participant an invitation for each event. You can select "Do not invite", "Invited", or "Not invited". If you select "Invited", enter the date you sent the invitation in the **Invite Date** column. If the participant's invitation status and date is the same for **All** events, select the invitation status and date in the first row of the grid.
4. In the **Registration** column, indicate whether you received the participant's registration form for each event. You can select "Do not register", "Registered", or "Not registered". If you select "Registered", enter the date you received the participant's registration form. If the participant's registration status and date is the same for **All** events, select the **Registration** status and date in the first row of the grid.
5. Click **Next**.
 - If, on the Registration Options screen, you mark **Assign guests and seating**, the Input Guests and Assign Seating screen appears. For information about the Input Guests and Assign Seating screen, see "Input Guests and Assign Seating Screen" on page 230.
 - If, on the Registration Options screen, you did not mark **Assign guests and seating**, the Summary Info screen appears. For information about the Summary Info screen, see "Summary Info Screen" on page 233.

Input Guests and Assign Seating Screen

If, on the Registration Options screen, you select **Assign guests and seating**, the Input Guests and Assign Seating screen appears for each event in the group. On the Input Guests and Assign Seating screen, you can assign the participant's seating for the event. From the Input Guests and Assign Seating screen, you can also initiate the Seating Setup Wizard to set up the event's seating arrangements, if necessary.

Guests are individuals or organizations attending an event as an invitee, or guest, of a registrant. On the Input Guests and Assign Seating screen, you can add information about any guests the participant brings to the event.

► Enter the participant's guest and seating information for each event

Note: If necessary, you can input the guest information and assign the participant's seating for the event at a later time from the participant record in the database. To skip this screen, click **Next**.

For each event in the group, you can enter guest information and assign seating for the participant on the Input Guests and Assign Seating screen.

1. On the Input Guests and Assign Seating screen, the name of event for which you are entering the participant's guest and seating information appears.

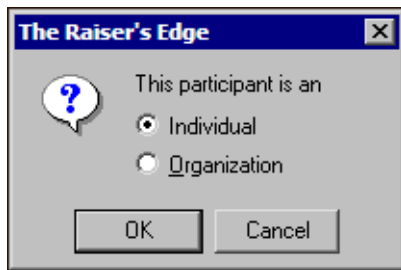
Note: If you have not set up your seating arrangements for the event, the Seating Setup Wizard appears when you click **Seating**. From the Seating Setup Wizard, you can define the seating arrangements. For detailed information about the Seating Setup Wizard, see “Event Seating” on page 39.

To add guests for the participant, click **Add Guests**. The participant's Guests screen appears.

On the Guests screen, if the participant has invited additional guests, a list of the guests appear in the grid. At the bottom of the screen, the total number of guests, total number registered, and total number attended appear.

To add a new guest to the list:

- a. On the action bar of the Guests screen, click **New Guest**. A message appears.



- b. Select whether the guest is an individual or organization and click **OK**. The New Guest screen appears.

Warning: Do not assume a guest is not in your database. To search your database for the guest, click the binoculars in the **Last Name** field. This prevents the duplicate entry of a participant. If you select the guest from your database, the program automatically populates the **Biographical** frame.

- In the **Biographical** frame, enter the guest's **Last Name**, **First name**, and **Middle name**.
 - In the **Titles** and **Suffixes** fields, enter the guest's titles and suffixes. Names can have up to two titles and suffixes.
 - If the guest has an alias, click **Aliases**. On the Aliases screen, enter the alias and alias type and click **OK**. When you search for a guest, you can mark **Check aliases** on the Open screen to search for the constituent by the alias.
 - To create a participant record in your database for the guest, mark **Create a participant record for this guest**. The **Total guests** field defaults to "1" and is disabled. If you do not mark this checkbox, you cannot seat the guest.
 - In the **Registration** field, select the registration status of the guest. For example, if you have received the guest's registration form, select "Registered". If you select "Registered", enter the date you receive the form in the accompanying date field.
- After the event, you can return to the guest record and mark **This guest has attended** to record that the guest attended the event.
- Under **Print Name Tags**, you can mark the checkbox and select a **Name to print**. To edit the name from the screen, mark **Editable**. Enter the **No. tags to print** and select a **Status**. For information about name tags, see "Set up name tags and place cards" on page 149.
 - Under **Print Place Cards**, you can mark the checkbox and select a **Name to print**. To edit the name from the screen, mark **Editable**. Enter the **No. cards to print** and select a **Status**. For information about place cards, see "Set up name tags and place cards" on page 149.

- j. On the toolbar, click **Save and Close**. You return to the participant's Guest screen and the added guest appears in the Guests grid.
 - k. On the action bar, click **Close**. You return to the Input Guests and Assign Seating screen. The **Number of guests** field displays the number of guests registered for the participant.
2. To assign the participant to a seat at the event, click **Seating**. If the seating arrangements are set up for the event, the Seating screen appears. From the Seating screen, you can assign the participant from the **Participants** frame to a seat in the **Seats** frame. On the **Seating** screen, you can also add the participant from the **Participants** frame to a group in the **Groups** frame and assign the group to seats in the **Seating** frame. For information about the Seating screen, how to add a participant to a group, and how to assign groups or participants to seats, see "Event Seating" on page 39.
 3. If a participant does not require a seat at the event, mark **Do not seat this participant**. When you mark this checkbox, the participant does not appear in the **Participants** frame on the event's Seating screen, in seating totals, or on seating reports. When you assign the participant to a seat, this checkbox is disabled.
 4. In the **Seating group** field, select or create a group to which to add the participant. To help add the participant to a group, click the **Groups** button in the **Seating group** field. A special Seating screen appears and displays only the **Participants** and **Groups** frames. On the special Seating screen, you can create a new group, add the participant to a group, and organize your groups.
 5. In the **Group/seating notes** field, enter any helpful notes about the participant's group and seating requests. For example, you can record when the participant requests to sit with a particular group.
 6. Click **Next**.
 - If the participant's guest and seating information need to be entered for another event in the group, the Input Guests and Assign Seating screen for the next selected event in the group appears. You must perform this procedure for each selected event in the group.
 - If the participant's guest and seating information has been entered for each event in the group, the Summary Info screen appears. For information about the Summary Info screen, see "Summary Info Screen" on page 233.

Summary Info Screen

On the Summary Info screen, a list of the events in the group the participant is registered, the **Unit** of registration fees for each event, the **Gift amount** of registration fees for each event, the **Number of guests** for each event, the general participant information for each event, and the amount of the **Total registration fees** for the group of events appears.



The screenshot shows a Windows-style dialog box titled "Grouped Event Registration Wizard" with a close button (X) in the top right corner. Below the title bar is a section labeled "Summary Info" containing the following text: "Registrations for Robert C. Hernandez will be added for the events below. To adjust the event registrations for Robert C. Hernandez, click Back. To finalize the registrations, click Commit." Below this text is a list box containing two entries. The first entry is "Afternoon Tea" with details: "Unit: Adult", "Registration fee: \$150.00", "Participation: Attendee", "Invite?: Not invited", and "Registration: Not registered". The second entry is "Starlight Concert" with details: "Unit: Adult", "Registration fee: \$30.00", "Participation: Attendee", "Invite?: Not invited", and "Registration: Not registered". At the bottom of the dialog box are three buttons: "< Back", "Commit", and "Cancel".

Grouped Event Registration Wizard

Summary Info

Registrations for Robert C. Hernandez will be added for the events below. To adjust the event registrations for Robert C. Hernandez, click Back. To finalize the registrations, click Commit.

Afternoon Tea
Unit: Adult
Registration fee: \$150.00
Participation: Attendee
Invite?: Not invited
Registration: Not registered

Starlight Concert
Unit: Adult
Registration fee: \$30.00
Participation: Attendee
Invite?: Not invited
Registration: Not registered

< Back Commit Cancel

If the participant's registration for the grouped events is incorrect, you can click **Back** and adjust the registration as necessary. After you have correctly set up the registration for the participant, click **Commit**. When you click **Commit**, the participant's registration and any new or updated participant information is committed to the database.

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