

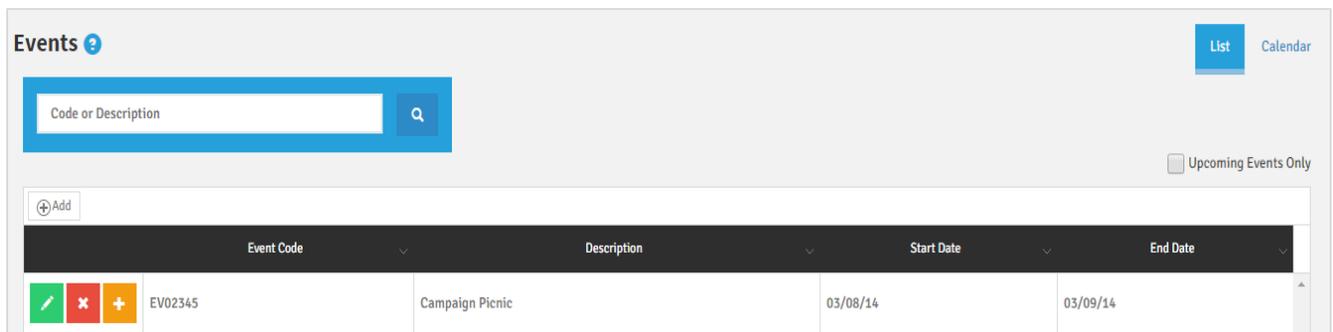


Events – Creating a New Event

Crimson allows you to create and manage your fundraising events. Below is the complete overview of the Crimson Events features.

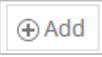
Events Manager

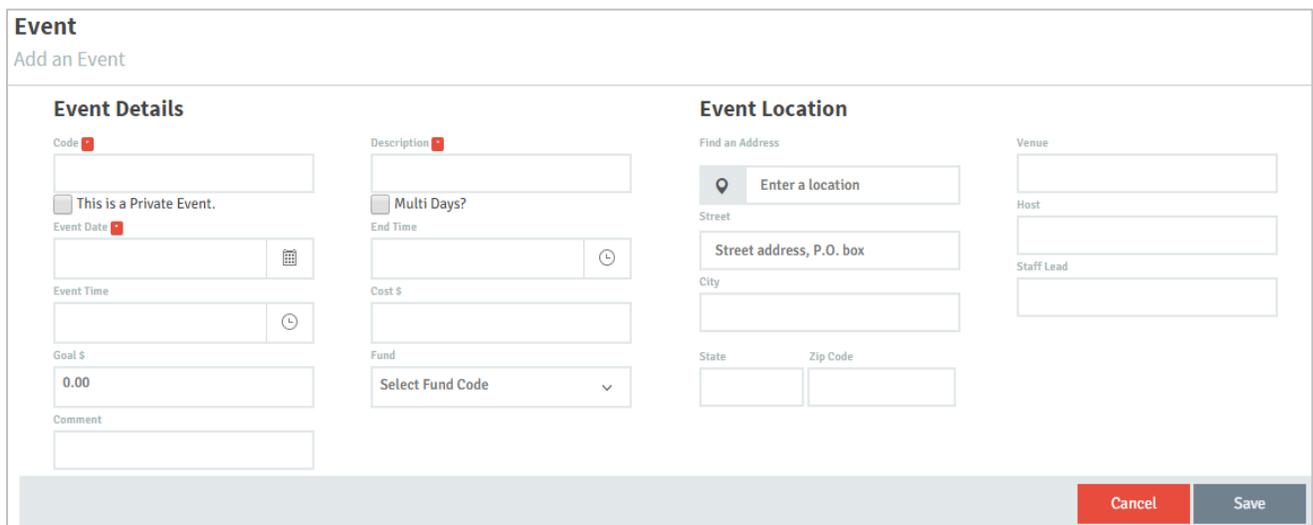
1. Go into the **People** menu and click on **Event**. The events will automatically be in the default **List** view that allows you to **edit** or **delete** events. You can also add and link a new source code to an event from this view by clicking the  button next to that event.
2. You can click **Calendar** to see your scheduled events laid out in daily, weekly, monthly views, or as an agenda. You can also check the **Upcoming Events Only** checkbox if you don't want to see past events.
3. In the **Quick Search** tool, you can search for events by **Descriptions** or **Event Codes**.



The screenshot shows the 'Events' page with a search bar labeled 'Code or Description' and a magnifying glass icon. There are 'List' and 'Calendar' buttons in the top right. Below the search bar is a table with columns: Event Code, Description, Start Date, and End Date. The first row shows 'EV02345', 'Campaign Picnic', '03/08/14', and '03/09/14'. There are also 'Add', 'Edit', and 'Delete' icons for each row. An 'Upcoming Events Only' checkbox is visible on the right.

Creating an Event

1. To create a new event, go to the select **Events** under the **People** menu of Crimson.
2. Click  within the **List** view. A new **Event** window will appear for editing.

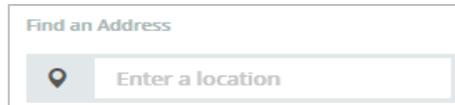


The screenshot shows the 'Event' creation form. It has two main sections: 'Event Details' and 'Event Location'. 'Event Details' includes fields for Code (marked with a red asterisk), Description (marked with a red asterisk), Event Date (marked with a red asterisk), Event Time, Goal \$ (0.00), and Comment. There are checkboxes for 'This is a Private Event.' and 'Multi Days?'. 'Event Location' includes a 'Find an Address' button, a location input field, and fields for Street, City, State, Zip Code, Venue, Host, and Staff Lead. At the bottom right, there are 'Cancel' and 'Save' buttons.

3. Enter all of your event information into the fields. Required fields: **Code**, **Description**, and **Event Date** are marked with a . When you have entered data into these fields, you can click  to create the event.

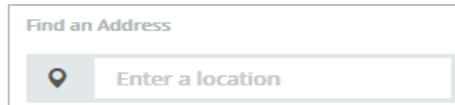
Additional Fields

- For events over multiple days, check the **Multi Days?** checkbox to add a second set of date and time fields – **End Date** and **End Time**. Enter the start date in the **Event Date** and **Event Time** fields.
- You may add a goal fundraising amount in the **Goal \$** field, a cost amount in the **Cost \$** field, select the default **Fund Code** from the drop-down menu, and leave a comment under the **Event Details** section.



Find an Address

Enter a location

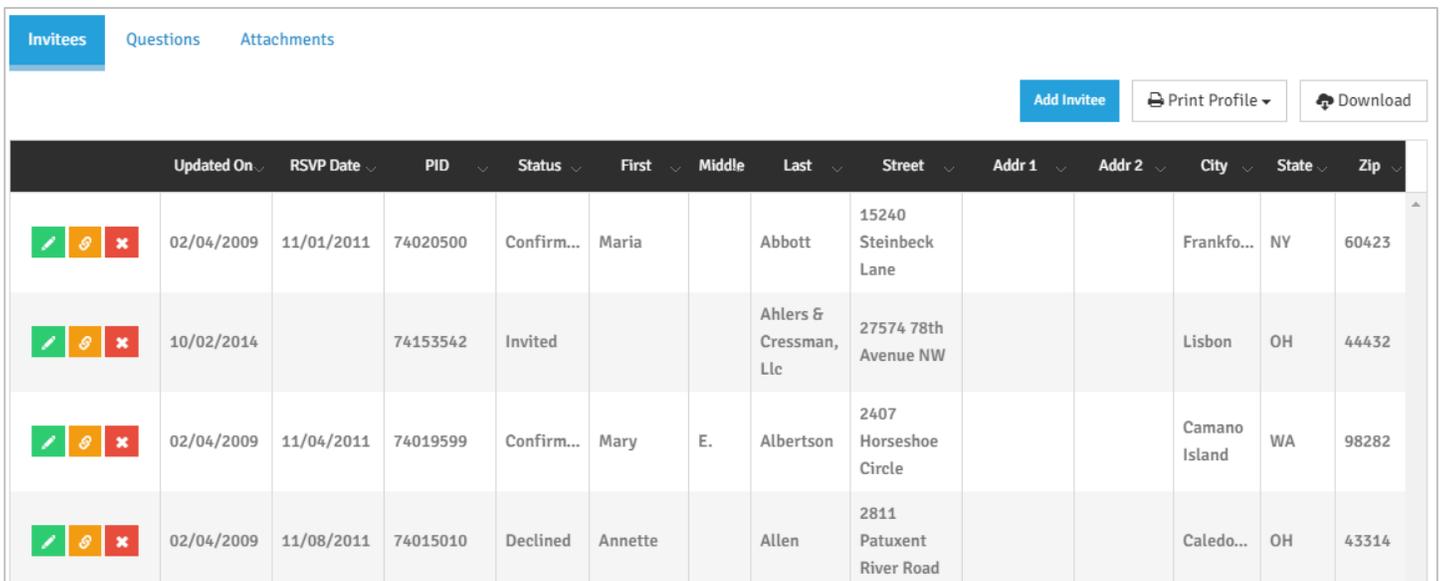
- For the event's location, you can use the  tool which allows you to search for an address. As you begin typing in a location, the drop-down will suggest matching addresses. When you select one, the address fields will automatically be filled in for you and the location will be mapped below.
- You also have the option of manually entering an address into the **Street, City, State, and Zip Code** fields.
- You may add additional info such as the **Venue, Host, or Staff Lead**.

Editing an Event

- To edit an Event, click the  button
- Once you're in the **Edit an Event** window, you can see summary boxes at the top with basic information on the event's fundraising numbers calculated from the gifts and pledges associated (must be linked to an existing source code) and the event cost as entered.
- When you have entered data into these fields, you can click  to create the event.

Adding/Editing Invitees for an Event

The  section within the Events window will display a list of existing invitees which can be exported by pressing the **Download** button.



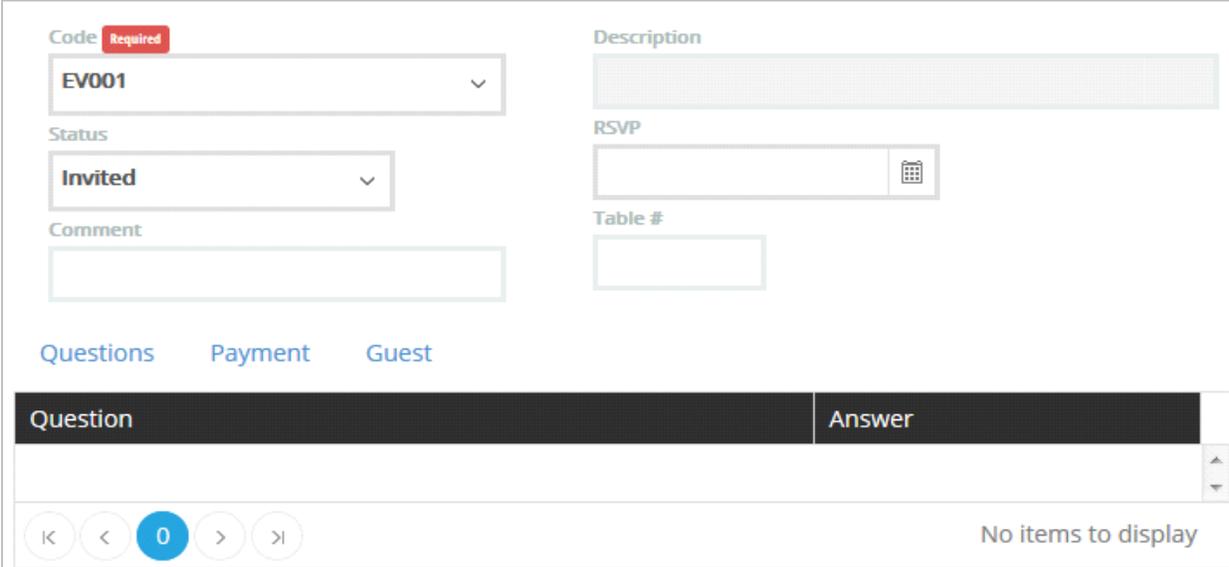
Invitees Questions Attachments

Add Invitee Print Profile Download

	Updated On	RSVP Date	PID	Status	First	Middle	Last	Street	Addr 1	Addr 2	City	State	Zip
  	02/04/2009	11/01/2011	74020500	Confirm...	Maria		Abbott	15240 Steinbeck Lane			Frankfo...	NY	60423
  	10/02/2014		74153542	Invited			Ahlers & Cressman, Llc	27574 78th Avenue NW			Lisbon	OH	44432
  	02/04/2009	11/04/2011	74019599	Confirm...	Mary	E.	Albertson	2407 Horseshoe Circle			Camano Island	WA	98282
  	02/04/2009	11/08/2011	74015010	Declined	Annette		Allen	2811 Patuxent River Road			Caledo...	OH	43314

- You can scroll through the pages of your list of invitees using the left and right arrows or by clicking on the desired page number at the bottom. You can also control how many invitees you'd like to have displayed per page: 5, 10, or 20.

- To open an invitee's record, click the  button which will take you to the People record's profile.
- To open an invitee's record, click the  button which will take you to the People record's **Event Participation** window in his/her profile.
- To delete an invitee from the event, click the  button.
- To print a profile or call sheet for all of the invitees, click the **Print Profile** button and select the type of profile you wish to print from the drop-down menu.
- To add a new invitee, click the  button and the **Search Invitee** window will appear. Search for the record by either ID, First/Last Name, Email, Employer or Occupation. Select the correct record in the list of results by clicking the up arrow which will open an **Add Event Participation** editor window.



The screenshot shows the 'Add Event Participation' editor window. It contains several input fields: 'Code' (with a 'Required' label) containing 'EV001', 'Status' set to 'Invited', 'Description', 'RSVP' with a calendar icon, and 'Table #'. Below these are three tabs: 'Questions', 'Payment', and 'Guest'. A table with two columns, 'Question' and 'Answer', is shown below the tabs, with a message 'No items to display' at the bottom right. Navigation buttons (back, home, forward) are visible at the bottom left.

- **Event Code** and **Description** should already be filled out with the appropriate data. Select **Invited**, **Confirmed**, or **Declined** from the **Status** drop-down menu. If you'd like to create/edit your event statuses, please go to **Settings** in the **People** Menu and open the **Event Status** tab to do so.
- If the person has RSVP'd, enter the **RSVP** date in the field or click the calendar icon to select it from the calendar. You may enter a table assignment in the **Table #** field and any additional info in the **Comment** field.
- You may enter any answers to questions associated with the event under the **Questions** section.
- Under the **Payment** section, a payment can be added for the event by clicking . A **Donation List** window will display corresponding gifts. Click on a gift once to highlight it and then press **Select**. To remove a payment, click that gift once to highlight it and then press .

You may wish to add guests associated with that invitee (e.g. when the invitees are allowed one or more guests or if the "invitee" is an organization/PAC). Under the **Guest** section, a list of existing guests will appear along with a couple of controls.

- Click  to open a **Contact List** window and select guests from the list of contacts associated to that People record. You may search the contacts by entering info into the **Search** box at the top of the window and then click the  button. Click the contact you wish to add as a guest to highlight it and press **Select**.

- To add a guest who isn't listed as an existing contact, click  to open an **Add Event Guest** window. Enter the basic info about the guest in the fields within the **Guest** section then click the **Question** section to specify answers to any existing questions for that event. Click **Save** or **Cancel**.
- When you've finished adding guests, click **Save** to save the invitee and return to the event or **Cancel**.

Adding/Editing Questions for an Event

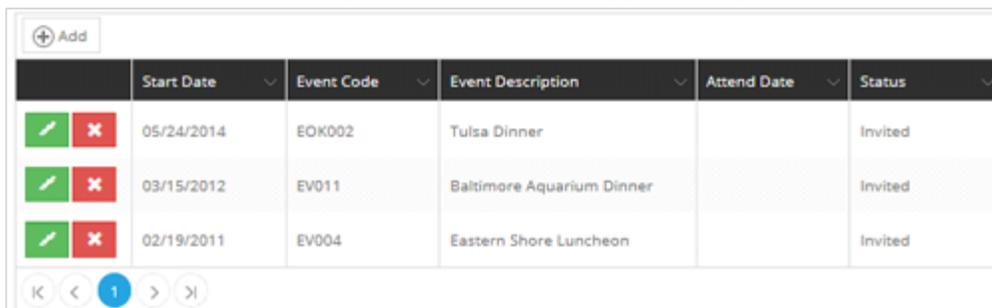
- You may add questions to the event under the  section at the bottom of the window. This allows you to specify certain information for each invitee. Enter the question in the field and then click **Add**.
- To edit an existing question, click on the question, make your edits, and then click **Save**. If the question requires a numeric answer, click the checkbox in the **Numeric** column once to fill it.
- To delete an existing question, click the . A confirmation message will appear asking: "Are you sure to delete the question - _____". Select **Yes** or **No**.

Adding/Editing Attachments to an Event

- You can add/edit attachments to the event under . To add an attachment, click the  button and select the file from your computer.
- To send an existing attachment as an email, click the  button, complete the email (ie. To, CC, Subject, and Message), and click **Send**.
- To delete an existing attachment, click the  button. A confirmation message will appear asking: "Are you sure to delete this attachment - _____". Select **Yes** or **No**.

Adding an Invitee to an Event via his/her People Record

- To add invitees through their records, open their **People record** and click the  section. A list of events to which that record had already been added to will appear along with a few controls.



	Start Date	Event Code	Event Description	Attend Date	Status
 	05/24/2014	EOK002	Tulsa Dinner		Invited
 	03/15/2012	EV011	Baltimore Aquarium Dinner		Invited
 	02/19/2011	EV004	Eastern Shore Luncheon		Invited

- Click **Add** to add a new event. An **Event Participation** editor window will appear for editing. Select the event code from the **Code** drop-down menu and then follow the instructions above for adding an invitee.
- Click the  button to edit an event under a record.
- Click the  button to delete an event from a record.