How To Create an Event with No Associated Revenue

	Instructions	Notes
1	**Add the Event**	
a	Click on **Events** on the Navigation bar	
b	Click on Events on the ***Add new*** button	
c	Click on **Event**	
d	Enter the name of the event in the **Name** field	Always remember to use standard naming conventions when creating events, including the word *Event* at the end.
e	Enter a description in the **Description** field (optional)	The description is for your use only, it will not appear anywhere on the constituent records.
f	Select a **Category** for the event (optional)	
g	Select the applicable **Sites** if this event belongs to a specific site or multiple sites in your organization	Always choose a site. This will help when searching for events.
h	Enter the **Start date** and **End date** for the event	The start date is required. The end date is not but it is a good idea to put an end date. Start and end times are not required.
i	Enter the **Location** for the event (optional)	If the location you select includes different rooms, you can select or add a room to use for this event. Enter the total number of attendees the event can accommodate. If you wish to indicate a location that is not in the list, please contact the Helpdesk and ask that the location be added.
j	Enter the **Contact** for the venue (optional)	If you have a particular person you work with at the venue and they have a constituent record in Davie, you can indicate here they are the main point of contact for the event location.
k	Click the ***Save*** button	You will now see the Event screen for the Event you just created
2	**Add Options to the Event**	
a	Find your event	
b	Click on the **Options** tab and ***Add*** the registration options that will be available for this event such as individual, couple, member, non-member, etc.	Make sure the options listed on the event match the information that will be available to registrants. **You must have at least one option to be able register attendees.**

3	**Add Coordinator(s) to the Event *(optional)***	
a	Event coordinators are the staff members or committees that oversee an event. To add one, click the ***Add*** button.	To Add a coordinator to an event they must have the constituency of Faculty/Staff. There may be more than one coordinator for an event, but only one can be set as primary.
b	Click on the **magnifying glass icon** to search for the person who is coordinating the event	
c	Select the appropriate **person** from the search results	
d	Click the ***Save*** button	
4	**Add Tasks for the Event *(optional)***	
a	An event task is a job that must be completed in preparation for an event. To add a task to the event, click the ***Add*** button.	
b	Fill in the **Name** field	
c	Fill in the **Comment** field	
d	Fill in the **Owner** field	The owner of the task must have the **Staff** constituency.
e	Fill in the **Date due** field	
f	Click the ***Save*** button	Once a task owner completes an assigned task, you can mark the task complete. Once a task is marked completed it will no longer show in the task list, unless you filter the list and click the "include completed" box.
5	**Add Speaker(s) to the Event *(optional)***	
a	On the **Speakers** tab of an event record, you can add and manage event speakers. To add one, click the ***Add*** button.	
b	Click the **magnifying glass icon** and search for the person who will be speaking at the event.	The speaker must have a constituent record in Davie. If they do not, you can request they be added to Davie by clicking on the **UNC Request Add a New Individual** on the Constituents functional area page.
c	Enter the **Topic** they will be speaking about	This is a mandatory field.
d	Enter **Date** of event (optional)	
e	Enter the **Time** of the event (optional)	
f	Add any **Comments** about the speaker (optional)	
g	Click the ***Save*** button	

6	**Add Expense information to the Event *(optional)***	
a	An event expense is a debt your organization incurs or plans to incur when you host an event. Vendors supply many of the goods and services required for events. To add a vendor go to the expenses tab. Click on the ***Add*** button.	In Davie, you must create an organization constituent record for each vendor. Once you add the constituent to an event expense, a constituency code of **Vendor** is automatically added to the organization's constituent record. You do not have to add the vendor before setting up the expenses.
b	Select the **Type** of expense from the drop-down list	
c	Search for and select the **Vendor**	This is not a required field, so you may track an expense without associating a vendor if you wish to do so.
d	Enter the total **Budgeted Amount** for the expense	
e	Enter the total **Agreed Amount** amount and **Date due**	This is the amount you and the vendor agree upon for the service and the date the payment is due.
f	Enter the total **Amount Paid** and **Date paid**	
g	Enter any additional information about the expense in the **Comment** field	
h	Click the ***Save*** button	
7	**Add Documentation for the Event *(optional)***	
a	You can attach documentation to the event, such as images of name tags, photos of table layouts, decorations, links to websites for vendors, etc. To do so, click the ***Add*** button on the Documentation tab.	
b	Select the appropriate **type** (Note, Media Link or Attachment)	Notes will let you enter free text notes related to the event. Media Links will let you save links to URLs. Attachments will let you attach scanned documents, PDFs, spreadsheets, Word documents, etc.
c	Fill in the yellow fields that are required for whichever type you selected. All other fields are optional.	
d	Click the ***Save*** button	
8	**Add Lodging Options for the Event *(optional)***	
a	On the **Lodging Options** tab, you can add and manage the facilities where your registrants stay when they travel to events. To add one, click the ***Add*** button.	
b	Click the **magnifying glass icon** to search for and select the **Lodging location**	The lodging location/venue must have a record in Davie. If it does not have one, contact the Helpdesk to request it be added.
c	Enter **Room types** available (including the number of people the rooms sleep and quantity of rooms allocated/reserved for the event)	
d	Click the ***Save*** button	

9	**Create the Query for your Invitation list *(optional)***	
a	If you <u>have</u> been to *Davie 302 – Creating Ad Hoc Constituent Queries* , set up a query for the people you wish to invite.	
b	If you <u>have not</u> been to *Davie 302 – Creating Ad Hoc Constituent Queries* , contact the Helpdesk to set up a query for you. Let them know this query will populate an event invitation list.	
10	**Add an Invitation list to your event *(optional)***	
a	Click on the **Invitations** tab and ***Add*** the name of the Invitation List	The name of the list does not have to follow naming conventions. This will appear on the invitee's Communications screen.
b	Enter the **Mail Date** the mailing will go out	This date will appear on the invitee's Communications screen.
c	Click on the **Processing** tab	
d	In the **How do you want to send your invitation?** section: - Select whether to send the invitation through mail, email, or both.	If you select *Send through both mail and email* , according to each constituent's preferences, select which method to use for constituents without a communication preference for mail or email.
e	In the **package(s)** section: If you are using Email, search for and select the package to send through email	If you do not have a custom email package for your school/unit/department, a package named **ALL FYXX Event Email Package** is available.
f	If you are using Mail, search for and select the package to send through mail	If you do not have a custom mail package for your school/unit/department, a package named **ALL FYXX Event Mail Package** is available.
g	In the **Address processing** and **Name format** section: - Select the Address processing option: "**ALL FYXX Primary Address, Seasonal, or Mail Preference Address Processing Option**" - Select your Name format option preference	There is also a business option for addresses. Note that name format options will show BOTH active members of a joint name format even if one spouse was excluded or not included in the query.
h	In the **householding options** section: - Select whether the type of constituents you wish to include in the mailing (all qualifying constituents, qualifying individuals and organizations or qualifying households) - Select whether you prefer to send to one person per household and/or whether you wish to include qualifying households which do not have any members	
i	Click the ***Save*** button	

11	**Add invitees to your Invitation list *(optional)***	
a	Click on the hyperlink for the Name of the list that you just created	
b	Click the ***Add*** button and choose **Multiple Constituents**	
c	Find the query you/the Helpdesk created to populate the invitation list	
d	Click on the ***Exclusions*** button	
e	On the **Exclusions** screen, choose all exclusions that are pertinent then click the ***OK*** button.	Deceased and inactive constituents are excluded automatically. You may **uncheck** the checkbox for Inactive constituents if you want their names to appear on your invitation and registration lists. For mailed event invitations, add your site's code AND "*UNC-No Mail Events" For emailed event invitations, add your site's code AND "*UNC-No Email Events" The default date for considering exclusions is "Today," you may change this to a specific date if you wish to do so.
f	Click the ***Save*** button	
g	You can also add invitees to the list one at a time by clicking the ***Add*** button and choosing **Constituent**	Click the magnifying glass icon to search for the constituent you wish to add to the list
h	Go through the list and manually remove anyone you do not wish to include	To remove someone from the list, click the **poplar** to the left of their name, then click the ***Delete*** button.
12	**Process the invitations *(optional)***	
a	Once you are happy with the list of invitees, you can process the invitations if you want the invitation to show up on the constituents' Communications pages	**Note:** Processing the invitation list will also add the invitees to the Registrations tab of the event, which makes it easier to record responses and register invitees that wish to attend.
b	To process the invitations, click the Send <invitation list name> link under the *Tasks* section on the Explorer bar	
c	Review the information you entered previously, then click the ***Start*** button	
d	**WAIT** for the process to tell you when it is completed	
e	Once the status is Completed, click the **poplar** beside each Export output created, then click the ***Download output*** button and choose **Single file**	This will give you a file for doing your mail merge and/or to use with iModules (or whichever email tool you use).
f	Click on the Invitee List hyperlink at the top of the screen	**Note:** The date in the Invitation sent on column will show the date you ran the process, however the date that will appear on the invitee's Communications page is the date you entered in the Mail date field when you set this up. Constituents that have no contact information or meet the Exclusion criteria you set will have a green check in the *Excluded from last send* column.