

1. Set up the shell for the event (steps A, B, C & G only)

Add an Event

When you add a new event, you enter information about the event including dates, start and end times, total capacity, and location.

The screenshot shows a web form titled "Add an event" with two main sections: "General" and "Details".

- General Section:**
 - A:** Points to the "Name" text input field.
 - B:** Points to the "Description" text area.
 - C:** Points to the "Category" dropdown menu.
 - D:** Points to the "Sites" table, which has a "Site" header and a "+" button to add more sites.
 - E:** Points to the checkbox "Do not show event on calendar".
 - F:** Points to the "Copy options" button.
- Details Section:**
 - G:** Points to the "Start date" and "End date" date pickers, and the "Start time" and "End time" time input fields.
 - H:** Points to the "Appeal" text input field.
 - I:** Points to the "Location" text input field, the "Room/Unit" dropdown menu, and the "Capacity" input field (currently showing 0).
 - J:** Points to the "Contact" text input field.

At the bottom of the form, there is a "Help" icon, "Save" and "Cancel" buttons.

- A. Enter the name and description of the event. **Always remember to use the naming convention when creating events. The description is optional.**
- B. Select a category for the event.
- C. 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.*
- D. Mark this checkbox if you **do not** want the event to display on the event calendar. Remember, **when events are on the calendar it is helpful for everyone planning events.**
- E. UNC-Chapel Hill will not be using this field.
- F. Click **Copy options** to display the **Copy from event** window. In the **Copy from** field, search for an existing event and mark the checkboxes for those options you want copied to the new event. For example, it is important to copy the expenses for your program events.



How To Set Up a Non-GAA Event

- G. Enter the start and end dates and times for the event. The start date is required. The end date is not but it is a good idea to put an end date. It will be removed from the calendar once the event has occurred.
 - H. To track the effectiveness of fundraising for the event, search for and select the fundraising appeal to associate with the event. GAA Events do not have a fundraising appeal.
 - I. Search for and select the location where the event takes place. 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. (This is optional)
 - J. Search for and select the individual constituent who serves as a contact for the event location. The contact person must have the faculty/staff constituency on their record.
 - K. Save the event.
2. Let Gift Services know what your mapping needs are for the event
 - By what method?
 - Via email for now to candace_clark@unc.edu
 - And this info needs to be included in the message:
 - Event Name
 - Event Date
 - Designation for tax deductible portion
 - Benefit Name
 - Benefit Description
 - Benefit Value
 - FRS Account # for benefit portion
 3. Gift Services will set it up & let you know via email when it's ready for you to proceed
 4. Event person finishes setting up the event and maps to the info Gift Services set up (the remaining steps in the diagram on page 1 of this document)