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Overview of Events

After the initial setup and configuration of this module, an event manager or coordinator can add prospects or register participants, review the latest information for the whole event or for a particular participant, maintain a to-do list, or add event-specific information such as budgeting or meal choices. The coordinator can also create a new event based on one of a similar type that was previously created.

Event-Related Reports

Click [here](#) for a summary of each report in this module.

A Note About Terminology: Registrant vs. Participant

A registrant is defined as the person (or organization) that signs up and pays the registration fee. Much of the time the registrant and participant are the same. However, if a person or organization is registering and not planning on attending but sending (and paying for) guests instead, then the registrant and participant are different people/entities. On the [Details tab \(Registration Entry\)](#), the person displayed on the left side is the registrant and the one on the right is the participant. You can specify an unlimited number of guests per registrant.

See Also:

[Summary of the Initial Setup/Configuration for Events About the Event Overview and Registration Entry Screens Creating or Setting up a New Event](#)

Summary of the Initial Setup/Configuration for Events

Below is a chart that summarizes the tasks that your system administrator (or someone with user privileges to create codes) should take to set up the Events module. Note that most of these tasks are one-time tasks although you may add or adjust these codes any time according to the type of event you are running. See [Configuring Your Events](#) for more specific information about setting up your events environment.

Tasks (Mostly) Creating New Codes	Description/Comments
Interaction Category and Type combinations	What will you use to capture interactions with participants, prospects or registrants? Using interactions with stage codes is a power method of tracking a participant. You can run reports and queries based on these codes. Create interaction category and interaction type codes according to your organization's business practices.
Stage Codes	Use the Registration Stage Code Entry screen to create codes that correspond to the phases that you want to track for a prospect or participant with regard to the event. You

Managing Events

	<p>can also set up events so that an interaction record is automatically created (or updated) when a participant is moved from one stage to another.</p> <p>Note that the codes of Declined and Registered are delivered codes since the Event Overview screen (Summary and Statistics tabs) calculates the percentages of those in these stages based on the number invited.</p>
Event Type Codes	<p>This is where you can determine the defaults and codes that are available to the person using the Event Overview, Registration Entry, and Volunteer Entry screens <i>based upon event type</i>. That is, if you track or offer similar information for a group of events, then it is helpful to setup defaults by Event Type. You enter the event and registrant attributes, the registrant and volunteer stages, whether or not interaction records are created based upon stage, and common tasks that can be set up on the Tasks tab (Event Overview and Registration Entry)</p> <p>Refer to About the Event Type Code Entry Screen for more information on using this screen.</p> <p>If the list of attributes is completely different for each event, then create the attributes (see the next item down in this chart) and specify the particulars for an event using the Attributes tab on the Event Overview screen.</p>
Event Attributes Event Registration Attributes	<p>Set up different levels of information that can be used for the Event as a whole, registration-specific (such as T-Shirt size or Route number), and registrant specific (account information you may ask when they register).</p> <p>See Using the Attribute Definition Entry Screen for more information.</p>
Event Group Codes	<p>Create codes that correspond to the types of events your organization runs. For example, create a code for Walks, Bikes, Dinners, Major Donor cultivations, or Client Program areas. (Note that these codes are distinct from Event Type Codes that can also represent groups or categories of events but include a range of defaults that are configured).</p>
Common Tasks	<p>The Tasks tab displays on the Event Overview and on the Registration Entry screens. You can link any TA report or operation so that it appears on these tab pages.</p>
Position Codes Participation Codes	<p>Create these codes if you want to be specific about how a volunteer (Position code) or a key account (Participation code) will participate in the event. See Managing Key Accounts and Volunteers for more information.</p>
Benefit Codes	<p>If you award prizes or fundraising incentive benefits, use the Benefit Entry screen to create your organization's benefit codes. These benefits can be awarded through the Batch Detail Entry screen or assigned to a registrant on the Registration Entry screen. On the Benefits tab (Event Overview) you select the benefits (or prizes) that are specific to the event. On this tab you can customize the amount ranges for which your participants can qualify. Note that if you do not use Batch Detail Entry to award the benefit, TA does not save the information in the</p>
	<p><i>Refer to the topic Benefits Tab (Event Overview) for more information about configuring benefits with events.</i></p>

	<p>individual's Benefits Award screen. However, benefits assigned through Registration Entry are query-able. That is, you can query the database and output a list of those who receive the benefits.</p> <p>See Overview of Benefits for information on how to create benefits.</p>
Location Codes	<p>Create these codes to represent where your events will be happening. These codes are especially helpful if your event has multiple sessions with different locations. Use the Location Code Entry screen to create the codes. (Note: you can zoom from Location field in the Event Overview screen.)</p>
Expense Codes	<p>Use the Budget Type Code Entry screen to create codes that correspond to expenses that you want to track. Use the Expenses tab on the Event Overview screen to capture the particular budget items (budgeted vs. actual) for an event.</p>
Meal Codes	<p>Create these codes if you want to track meal options for an event. You can assign any registrant a meal choice according to the Meal codes that you have entered in the Meal tab in the Event Overview screen. (Note that must include the Meal Registrant Attribute for the Event Type if you want to track meal choices.)</p>
Project Codes	<p>If you want to use TA's Project functionality, you can link a project with a benefit package and then award that package on the Gifts & Pledges tab to a registrant (such as a sponsor), the project code is placed on the transaction. Use the Project Code Entry screen to create project codes according to your business practices. Click <Projects> from the Event Overview screen to view (or add) account project records that are associated with the event.</p>
Soft Credit Type Codes	<p>You can create soft credit codes that correspond with your organization's incentive or bonus dollars for event related participation. In addition, you can allow these soft credits to be used to toward their fundraising obligation (toward fulfillment of their pledge). Use the Soft Credit Type Code Entry screen to create these codes. You can mark these checkboxes for any soft credit type that you set up:</p> <p>Allow as Stand-alone: If marked users may create transactions with a transaction type of GF and the specific soft credit type that your organization uses for stand alone soft credit transactions.</p> <p>Allow as Linked: If marked users may specify the soft credit in the Soft Credit window on the Batch Detail screen.</p> <p>Allow on Matching Gifts: If marked users may specify the soft credit when processing a matching gift form (using the Matching Gifts window in the Batch Detail screen).</p> <p>Count Towards Pledge Fulfillment: If marked then TA allows that transactions with this soft credit type will be used when calculating the pledge status. Note that either one (or both) of the first two checkboxes must be marked if you mark this checkbox.</p>

About the Event Overview and Registration Entry Screens

As you manage an upcoming event, you mainly use the Event Overview or the Registration Entry screens. Below is a summary of the tasks that you can perform from these screens.

For information about how to use specific fields in the Event Overview screen, see [Using the Tab Pages on the Event Overview Screen](#). For information about entering Registration Entry related fields, see [Managing Registrants, Participants, or Prospects](#).

Event Overview screen: This screen serves as the main portal where you can review up to the minute statistics such as number registered and counts of other stages that you have defined such as declined, canceled etc. You can access event-related data screens from here such as Registration Entry, Key Accounts, and Volunteer Schedule Entry. From the Event Overview screen you can:

- Create brand new events or create them by copying a similar event. Create multi-session events where you define characteristics that are common to all sessions and information that is distinct such as Date and Location for each session.
- Click <Registrants> to manage participant or prospects (you can register or add people to the event and assign a stage such as Warm Prospect).
- Click <Key Accounts> or <Volunteers> to add those who are serving in leadership roles or volunteering for the event. When you designate an account as either one of these, TA automatically creates an interaction record for the account.
- Click <Planning> to create a running list of tasks or to-do items that pertain to the event.
- Click <Diary> to view any account's most recently created interaction in the [Account Diary Entry screen](#). From this screen you can create a new interaction, access the account's full Interaction History, or access other account-based screens such as Account Overview.
- Click <Benefits> or <Projects> if you need to create new benefits or want to see the account project records which the event can be associated.
- Use the Attributes tab to define event-specific content such as Number of balloon bouquets, tables, or chairs needed and Registrant/Participant-level information that you want to track.

Registration Entry screen: This screen serves as the main portal where you can see a list of people who have either registered or whom are added to the event with a particular stage such as Warm or Hot Prospect, Declined. You can also see the Team that he or she is associated with, and review how much has been paid or pledged so far (for each registrant and for the event as a whole). You can sort the list by Participant, Stage, Team, Attended, Account ID, or filter the list to view only a particular team or those in a particular stage. You can also

view registrants across multiple events. From the Registration Entry screen you can:

- Register a new person or update his or her stage. For example, you can change the Stage field from Cold Lead to Registered or from Registered to Canceled. (Use whatever stages are applicable to the event that you have set up.) You can set up your event so that TA automatically creates an interaction for the account.
- Enter the participant's Employer. If the account does not exist you can create a new account or just enter the organization's name and address.
- Update Attendance or Team for the registrant.
- View or update **registrant**-specific information such as Birth Date or other questionnaire information that you ask on registration forms. Certain information can be set up so that it displays demographic or account data if it already exists or you can update it and the information will be tied back to the individual's account.
- View or update **event** participant specific information such as T-shirt size, route number, or other information that has been set up for this event that is relevant to the specific event and participant.
- Enter a payment or a pledge from the registrant, participant, or sponsors. You can also process soft credit transactions that help fulfill the participant's pledge obligation.
- Run Reports or Labels or other common tasks that were set up according to the event type.

Creating or Setting up a New Event

Create a new event so that you can start the process of identifying prospects or registering participants. You can create a new event by copying an existing one. When you do this, TA provides you the choice to copy all of the information that was set up on the Tab pages such as Revenue and Expenses.

- Click <New> from the Event Overview screen.
- In the Create New Event window, assign the new event code. Note that commas are not allowed in the event code name. If you do not want to base yours on a copy, specify the Event Type and click <Create>.
- If you want to base your new event on a copy, click <Copy Event...>. In the next window, specify the event and the information you want to copy. In the Information to Copy block, mark the check boxes according to the information you want to copy. For example, you can copy active Shifts/Positions and Volunteers from the original event.

If you copy a multi session event, TA defaults the Start Date on the Recurrence page to the start date of the event you are

copying. TA does not copy sessions (or information such as location) that are not part of the pattern. For example, if each of your sessions has different location then, TA will not copy the Location information.

- Enter the fields in the [Tab pages](#) according to the specifics of your events.

Working with an Upcoming Event

[Using the Tab Pages on the Event Overview Screen](#)

[Managing Key Accounts and Volunteers](#)

[Maintaining an Event To-Do \(or Reminder\) List](#)

[Managing Registrants, Participants, or Prospects](#)

[Entering Gifts, Pledges, Pledge Payments, or Soft Credits \(Event-Related Transactions\)](#)

Using the Tab Pages on the Event Overview Screen

The Event Overview screen consists of a series of tab pages (Summary, Statistics, Sessions, Revenue, etc.) that organize information about the whole event (or the whole series if you are working with a multi-session event). You will not use every field or every tab for every event. For example, if meal choices do not pertain to the event, then you would not use this tab. This section provides general descriptions of each block (or tab). Most of the fields are entered when you first set up the event.

See Also:

[Summary Tab](#)

[Statistics Tab](#)

[Sessions Tab](#)

[Revenue and Expenses Tabs](#)

[Shifts/Positions Tab](#)

[Benefits Tab](#)

[Tasks Tab](#)

[Attributes Tab](#)

[Other Tab](#)

Summary Tab (Event Overview)

This page displays general information that you can enter to better describe the event.

Field/Area	Description/Comments
Start and End Dates and Times or	If the event has multiple sessions, the top left includes a text description of the schedule of sessions. Otherwise, you see the Start and End Date and Time fields. An example of what you might see for a description of the recurrence

<p>Recurrence pattern description</p> <p>Recurrence... button</p>	<p>pattern: 'Occurs every day effective 03/26/03 until 04/30/03 from 10:00 AM to 11:30 AM, with exceptions.'</p> <p>If there are any variations with a particular session such as starting at a different time or location, then TA adds <i>with exceptions</i> text.</p> <p>Click Recurrence... to set up a recurring pattern for multi sessions. You can also use the Sessions tab to set up recurring sessions or to add sessions that differ from the regular schedule.</p>
<p>Location</p> <p>ZIP, City, State</p>	<p>You can use either of these fields to describe where the event takes place. You can press [F10] to go to the Location Code Entry screen and create new codes. (On this screen you can specify address, description, and directions. Using location codes is helpful for multi-session events, if sessions occur at a different site or in different rooms.</p> <p>If your organization does not use Location codes, you can enter a valid ZIP and TA displays the corresponding City and State. (You can enter only City and State if you want.)</p>
<p>Event Type</p>	<p>This describes the general kind of event and was specified when the event was created. You are not permitted to change this field after the event is set up. Event type determines the Event Attributes that you can enter on the Attributes tab. The Registrant/Participant attributes that display and are selected determines what you can track for a registrant in the Registration Entry screen</p>
<p>Affiliation Office</p>	<p>Press [F9] and enter either field according to your organization's business practices.</p>
<p>Financial Summary</p>	<p>If you have Revenue and Expense information entered on either or both of these tab pages, TA displays the Goal, Actual, and Variance amounts and TA calculates the net value amounts. TA also provides a total dollar amount of all Pledge transactions posted toward the event regardless of revenue budget criteria set up on the Revenue tab.</p>
<p>Statistics</p> <p>Capacity Invited % Registered % Declined % No Response</p>	<p>You must manually enter the Capacity and Invited fields.</p> <p>% Registered is based on capacity and those that are in the Registered stage. % Declined is based on invited and those in the Declined stage. % No Response is based on the number entered for invited minus those that are in these stages: Register, Declined, Cancel, Returned</p>

Statistics Tab (Event Overview)

Field/Area	Description/Comments
Counts by Stage	TA counts registrants that are assigned a particular stage. Note that if there are no participants at a particular stage, then TA does not display the count. For example, you might have a code called WAITLIST. Until you assign a registrant this stage, it is not listed.
	You must manually enter the Capacity and Invited

Other totals	<p>fields. TA adds up these totals based upon the information in the Registration Entry screen (Participants, Details, and Gifts & Pledges tabs)</p> <p>Participants Attended Not Attended Volunteers Teams Average Pledge</p>
<p>Event Percentages</p> <p>% Invited % Registered % Attended % Declined % No Response</p>	<p>TA calculates these percentages based upon those in stage of Registered or Declined, or those marked as Attended (on the Participants tab in the Registration Entry screen) using the totals that you enter for Capacity and Invited.</p> <p>Note that % No Response is based on the number entered for invited minus those that are in these stages: Register, Declined, Cancel, Returned</p>

Sessions Tab (Event Overview)

Use this tab if you are working with an event that has break-out sessions or segments where you want to track registrations or attendance. You can create sessions with a pattern (such as five Tuesdays from 10 AM to 11 AM) and those with no specific pattern.

- If there is a schedule already set up, each session is listed in the Events Sessions multi-row block. If a particular session veers from how the overall pattern is set up (such as time, location or is on a Thursday, instead of a Tuesday), then TA displays the session in **BLUE TEXT**.
- Click <Recurrence...> to set up a new schedule or add to the existing schedule.
- To add a session that is outside of a recurring pattern, click in a blank line of the multi-row block and specify Date and Time, and Location (if applicable).
- The way registration works is that you register a person for the whole series. If they will not be attending a particular session, find that session and remove them from the Participants tab (Registration Entry). See [Using the Participant Tab \(Registration Entry\)](#) for more information.

Revenue and Expenses Tabs (Event Overview)

The **Revenue** tab displays how you want to track revenue for the event. You can enter up to five combinations where you can track goal projections and current actual revenue. In the multi-row block on the screen, select the specific values to track (press [F9]). (TA automatically creates columns according to your selection in the Budget By fields.) You can select among these values in the Budget By fields: Activity, Campaign, Credit Account, Effort, Fund Type, Initiative, Source.

- TA automatically updates the Gifts, Pledge Payments, Pledges, Variance and Totals fields when transactions are posted with this combination.
- If this tab is already filled in, beware of changing the Budget By fields. If you change any of these fields, TA provides an alert warning you that all budgeting information will be removed. If you click <Yes>, then all of the contents in the multi-row block are removed.
- Use the horizontal scroll bar to see more information such as Office or Budget Date.

The **Expenses** tab displays expenses according to the Budget Types your organization has created. Press [F9] in the Type field and select from the list according to what you need to track for the event.

- TA updates the Totals and the Variance fields when you enter Budgeted and Actual Amounts.
- Enter the Office field and Budget Date fields according to your organization's business practices.

Shifts/Positions Tab (Event Overview)

Use the **Shifts/Positions** tab page, if you want to segment volunteers into shifts. Within each shift you can define multiple, specific positions.

- Define multiple shifts by clicking in a blank row in the Shifts block and entering the name of the Shift and Description, Start and End Time. The Status field defaults to 'A' (for active). Change the status if a shift is no longer needed. (If a blank row is not displayed, make sure that the cursor is in the Shifts block and click <New> to create a blank line.)
- To define positions within a shift, highlight the shift and click in a blank row in the Positions block. Press [F9] in the Position field. Enter the number Needed field. If the position reports to coordinator or committee member who is serving as Chairperson, specify an Account ID in the Chairperson field. (You can press [F9] to find the account.)
- TA updates the number Scheduled and number Worked fields if you [schedule an individual or group of volunteers](#) (that is you set their stage to Scheduled) and then later update the stage to Volunteered.
- *If you are working with a multi-session event:* Set up the shift and position combinations for the first session, then click **<Copy Shifts and Positions>**. TA copies all active shifts and positions that you have setup for each subsequent session. You can add additional shifts or adjust positions for a specific date. Also, if you have multiple sessions, you may define shifts for each session. Press [F9] in the Session Time field to select the session. You can sort shifts by session time by clicking on the Session Time column button.

Related Topic:

[Managing Volunteers](#)

Benefits Tab (Event Overview)

If there are benefits or prizes set up that are specific to this event, they are listed in the multi-row block. This list can serve as a reference according to your organization's business practices:

- Those benefits related to the event that should be awarded through the batch detail entry process. When benefits are awarded this way, they are linked to a transaction and you can view the benefits that were awarded on any particular transaction by using the Giving History Detail screen. If your organization offers participants more than one, then you must use this transaction-benefit method of awarding benefits. You can use all TA's existing benefit management features such as automating awarding, delivery, and inventory management.
- Or, those benefit choices that can be entered on the Detail tab in the Event Registration Entry screen. You can specify only one benefit (or prize) on the Details tab. If your organization uses this method of awarding a prize to the participant, then to view the benefits/prizes that participant has received you must either review the Details tab (Registration Entry) for the participant or create a query/output where you can review a list. You cannot view these benefits on the Giving History Detail screen.

With this method, you can still automate the awarding of benefits based on amount that the participant has paid (or pledged). Once you have entered the available benefits on the Benefits tab (Event Overview) you can use the [Award Event Benefits Procedure](#) and TA will evaluate each registrant's benefit requested information against the funds raised. This requires that you use the Requested or Awarded fields on the Details tab (Registration Entry) to specify a standard or alternate choice or a specific benefit.

- **Benefit Packages and Projects for Events:** You can associate packages (such as Silver, Gold, Platinum sponsor packages) with an event. The Package field on the Gifts & Pledges tab (Registration Entry) displays packages which you can award any registrant. Once the transaction is posted, the benefit items are on the account and you can view them on the Benefits Awarded screen and maintain this information like any other transaction benefit. If a Project code is entered next to a package and the package is awarded, then the Project code is also on the transaction and you can use standard project functionality.

As with benefit items (or prizes) that you associate with an event, you can customize for each event the Minimum and Maximum Amount (see below), and with packages, you can also customize the items that are included with the package.

The Benefit Items section displays the items available and selected if your cursor is on a benefit package.

Event-specific benefit packages that you designate are not awarded automatically when you enter a transaction using the Gifts & Pledges tab (Registration Entry). You can set standard benefits with auto-awarding criteria (the user entering the transaction would not see these unless he or she visited the Batch Detail Entry screen). If you want to use both event-specific benefits and auto-awarded benefits, make sure that they do not overlap. For example, do not set up SPGOLD on Benefit Entry to be auto-awarded and also set this up on Benefits tab (Event Overview) to have users enter the package manually on the Gifts & Pledges tab (Registration Entry).

Identifying Benefits for the Event

- Press [F9] in the **Benefit** field. If you don't see the benefit or prize that you need it means that it was not created using the [Benefit Code Entry screen](#). (Click <Benefits> to access this screen.) Enter as many benefits as is necessary to capture the choices that are available for the event. You can group benefits according to minimum and maximum amount ranges.
- The **Minimum** and **Maximum Amount** fields default according to how the benefit was set up. You can override the default. Note that these amounts are used by the Award Event Benefits procedure. The Benefit Auto Awarding procedure does not look at these amounts.
- In the **Selection** field you can identify which ones serve as **Standard** and **Alternate** choices within the Minimum and Maximum Amount range. You should only have one benefit within the range designated as Standard and Alternate selections. That is, you cannot assign two benefits as 'Standard' if they share the same Minimum and Maximum Amount ranges or if you only have two benefits listed. On the Details tab (Registration Entry) if you enter 'Standard' or 'Alternate' as the benefit choice, then TA will award the corresponding benefit when you run the Award Event Benefits Procedure. (The Default Benefit Selection Type system preference determines how the Selection field defaults.)

If your organization is not be using the Details tab (Registration Entry) to assign a benefit, then you can leave the Selection field blank.

- For Benefit Packages: Enter a **Project** code if you want those accounts that are given the benefit to also have an account project record created or updated.

The **Benefit Items section** displays the items available if your cursor is on a benefit package. To customize the particular items that are given, highlight the benefit package

items that want to use for the event and use the right arrow to move them over to the Selected box.

Related Topics:

- [Award Event Benefits Procedure](#)
- [Using the Details tab \(Registration Entry\)](#)

Tasks Tab (Event Overview)

What is available on this tab depends upon the event type that you are working with and your user privileges. For example, you may be able to run the Event Profile report or run labels from this tab. Your system administrator set up what displays based upon event type. If you have not been granted access to a particular task (even if it was set up to display on the tab) then it is not listed.

Attributes Tab (Event Overview)

Event Attributes block:

- Displays fields that were set up according to the event type. Enter these according to what you want to track for the event.

Registrant/Participant Attributes block:

- Use this block when you are setting up the event. Select items according to what you want to track on the registrant/participant level. Highlight items on the left side (available attributes) and click on the right arrow to move them to the right so that you can track this information. If you don't see an item on the left that you need, it means that the registrant attribute was not created using the [Attribute Definition Entry screen](#).

Other Tab (Event Overview)

The **Other** tab includes miscellaneous information that can help you track event-level information.

If applicable to the event, the **Meals** block displays meals or meal choices that are offered at your event.

- Any meal listed on this tab can be offered to Participants. (Registrant Entry, Attributes tab)
- Press [F9] in the Meal field and select from the list add enter meal options for the event. If you want to remove a meal option, highlight the line in the multi-row block and press <Shift> [F6]
- TA updates the Ordered field according to the number of registrants that are assigned the meal.

Other block:

- Activity, Fund, Source: Enter these fields according to how transactions will be posted. This is for reference only. TA does

not require that transactions posted for the event meet these criteria.

- **Minimum:** If there is a minimum amount that is required for an individual or organization to participate in the event, enter the amount here. This is for reference only. TA does not require that transactions posted for the event meet this minimum.
- **Query All Registrants checkbox:** This field defaults according to how the event type was set up. You can change it if you'd like. If this is **unmarked** TA provides a choice when you find registrants to Find All or to find a subset (filter). If this checkbox is **marked** then TA automatically displays all registrants. For events where you have thousands or hundreds of registrants, it is helpful to display a filtered list. For smaller events, mark this checkbox.

You can always click <Find> in the Registrant Entry screen to find a subset or adjust sorting of the registrants.

- **Comments:** Enter text (up to 256 characters) that helps you better describe the event (if the Event Description field isn't enough) or other information that helps you (or others) work with the event.

Managing Key Accounts and Volunteers

When you designate an individual or organization as a key account TA automatically creates an interaction record for the account. Your organization can configure whether or not to create interaction records for event-related volunteers (this default is based on the Event Type Code setup). TA automatically creates an interaction record when you create a volunteer record for general volunteers. For these volunteers, TA uses the Volunteer (VO) Interaction Category and the Volunteer Schedule (VSCHED) Interaction type codes. You can further define the roles by using Participation codes (for Key Accounts) and Position codes (for Volunteers), if your organization has created these codes.

See Also:

[About Key Accounts](#)
[Managing Volunteers](#)

About Key Accounts

Use the Key Account feature to add leaders, event sponsors, chair people, hosts, or any account that is serving in a critical capacity for your event. When you designate an account as a 'key account' for an event, TA automatically creates an interaction for the account using the Event (EV) Interaction Category and the Key Account (KEYACCT) Interaction Type codes. The Event code is also captured on the interaction.

You can assign a Participation Code to each key account if you want. This is not required, however the Participation code helps to further define and distinguish the roles among these accounts for the event. The Participation code is also part

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of the interaction record, giving you the added flexibility to query or easily find all of the accounts that served in a particular capacity.

- Click <Key Accounts> from the Event Overview screen to see a list of existing key accounts for the event or to add (or remove) accounts who will serve in a particular role for the event. If you update the Participation field, TA will update the existing interaction with the participation code. If there is something in the Package field, it means that a benefit package was assigned to the account using the Gifts & Pledges tab on the Registration Entry screen. (The transaction does not have to be posted for the Package to display here.)
- To add a new key account, click in a blank line and enter the Account ID. (You can press [F9] and find or create an account.)
- To remove an account from the Key Account list, highlight the corresponding line and press <Shift> [F6]. TA removes the corresponding interaction record.

Linking Registrant Stage and Key Accounts: You can set up an event so that a Key Account entry is automatically added if you assign a registrant a stage of your choice. See [Using the Event Type Code Entry Screen to Configure Events](#) for more information.

Managing Volunteers

TA provides these screens to help you manage committee members, general volunteers, and those who are volunteering for specific events.

- **Volunteer Account Overview** -- This is a [version of the Account Overview](#) screen that provides a place where you can look up an account and view volunteer-specific information such as volunteer skills, availability, volunteer history, hours worked (year to date and lifetime total), interests, and volunteer-specific notes
- **Committee Entry** -- [Use this screen](#) to manage your organization's general or event-specific committees and subcommittees. You can track the group's responsibilities and focus, positions needed, and meeting schedule. Use the **Committee Volunteer Entry** screen to [manage committee members](#).
- **Volunteer Schedule Entry** -- This is where you [designate the particular people or groups who volunteer](#) with an event or those who generally work for your organization apart from any event. When you designate someone as a 'volunteer' you schedule him or her and use the Stage field to manage whether they volunteered, canceled, or were a no show. Use other fields such as Hours worked and Position to capture more details. TA automatically creates an interaction record (with an Interaction Category of VO and Interaction Type of VSCHED) for general volunteers when you change the Stage to Volunteered.
- **Event Overview** -- Use the [Shifts/Positions tab](#) to define your needs for event-related volunteers. Click <Volunteers> from this

screen to access the Volunteer Schedule Entry screen and schedule the specific event-related volunteers.

About Volunteer-related Reports, Queries, and Procedures

- Use the [Account Profile report](#) if you want a print out of all of the information that displays on the Volunteer Overview screen. You can limit and set the level of detail that you want to see for one or multiple accounts. Here are some ideas for restricting information in the report to volunteer-specific information:

Set 'Classification Category' to VM (for Volunteer Management) if you want to review volunteer skills; they are captured using the VSKILL classification code.

Set 'Show Volunteer Availability' to 'Y' to display availability records that were created for the account.

Set 'Selected Interaction Categories' to NO to see volunteer-related notes that are captured using the NO Interaction Category (you can set this to additional values if your organization captures interactions using specific categories and you want to see those on the report as well.)

If you would like to see the list of events for which the account has been associated (that is, the account is listed on the Registration Entry screen) set the 'Show Event Registrants?' parameter to Y.

- Review the list of volunteers for an event by running the [Event Profile report](#) and setting the 'Show Volunteers?' parameter to Y. TA displays the Account ID, Name, Position, Stage, Hours Worked, and Comments for each volunteer associated with the event. Also, set the 'Show Positions?' parameter to Y if you want to view both Shift and Positions that are defined for the event(s).
- Use the [Committee Listing report](#) if you want to print out committee-specific information that is displayed on the Committee Entry screen for one or multiple committees.
- Use the **Volunteer Schedule** query type if you want to build queries and outputs based upon any field in these screens: Volunteer Entry, Committee Entry, Volunteer Availability, and Name Entry. Use the **Volunteer Availability** query type to build queries based upon availability records that you have in TA.
- You can query on **Scheduled** and **Actual** values for Start Time, End Time, and Position. If the Stage is set to Volunteered, you can query on Actual Start Time, Actual End Time, and Actual Position. If Stage is set to any other value, the information is stored in Scheduled Start Time, Scheduled End Time, and Scheduled Position.
- Use the [Award Complimentary Benefits](#) procedure if you want to award a particular benefit to a group of volunteers.

Using the Volunteer Account Overview Screen

If you want to see volunteer-specific information in one place, then you can use the Volunteer Account Overview screen. This screen is modeled after the standard [Account Overview screen](#) where you can view account-level or name-level information on one screen and zoom on any block to view more detailed information. Just like the standard Account Overview screen, you can view name, address, telephone, email, activity, and relationship information. You can filter to view information for the whole account or a particular name on the account. In addition to the standard information for the account, the Volunteer Overview screen displays:

- **Classifications:** This block displays any classifications with a VSKILL classification code first. If other classifications exist on the account they are listed also, but VSKILL codes are listed first.
- **Availability:** If availability records have been created that capture when your volunteer is available, then you see it displayed on the Availability block. You can zoom to access the Volunteer Availability screen where you can edit or create new records. You can change the Status or edit the Valid Dates and Comments fields on an existing availability record. Create a new record if you need to capture additional availability for a volunteer such as day of the week and part of the day.

Name: Press [F9] to select the volunteer.

Day of Week: Select All, Weekdays, Weekends, or a specific day of the week from the drop down list.

Day Part: Select All, Morning, Afternoon, or Evening from the drop down list.

- **Interests:** On the Volunteer Overview screen you don't have to click on a button to view the interest records associated with the account, you can view the information directly from the Interests block. TA displays first those Interest records that correspond to having the interest category of V (for Volunteering). If other Interest codes exist then those are listed after the volunteering interest codes.
- **Volunteer History:** The Volunteer History tab displays a line for each time the volunteer has been scheduled to volunteer either for an event or as a general volunteer for your organization. This is view-only. You can use the arrow key or click on a line to view any comments that are associated with the particular schedule record. This tab displays Work Date, Event, Shift, Position, Stage, and Hours Worked according to what has been entered on the Volunteer Schedule screen.
- **Volunteer-specific Notes and Total Volunteer Hours:** In addition to the total calculation of Lifetime Hours and Year to Date volunteer hours, the Additional tab displays any interaction records that use the Interaction Category of NO and Interaction Type of VOL. You can create these interactions by using the [Notes](#) icon or by any of the standard screens available that you use to create interaction records. If you want the information to show up on this tab, make sure to use the Interaction Category of NO and Interaction Type of VOL when you create the interaction.

Setting Up and Working with Committees

Use the Committee Entry screen to set up committees and subcommittees. These committees can be associated with a specific event or not. For any given committee you can track general purpose and responsibilities, meetings, and positions needed. Track members of these committees by using the Committee Volunteer Entry screen.

- Create main or master committees first. To create a new committee, press [F6] or click on the <New> icon. See the field descriptions below.
- To make a subcommittee, press [F9] in the **Master Committee** field and select from the list. You can enter multiple committees in this field. If you specify a committee that is already linked to another (it is itself a subcommittee), then when you visit the Subcommittee tab you will see multiple levels (more than the master and one subcommittee).
- Change the **Status** field if committee is no longer active.
- Click <Committee Volunteers> to access the [Committee Volunteer Entry screen](#). This is where you assign members to a committee. Click <Event Volunteers> if you want to access the [Volunteer Schedule Entry](#) screen where you schedule event-related (or day of event) volunteers. Run the [Committee Listing](#) report to review the committees that are set up for your organization.

Field Descriptions on the Committee Entry Screen

Field	Description
Details Tab	<i>This tab contains general information about the committee.</i>
Event	The event associated with the committee. Press [F9] to access a list event codes that your organization has created. You can leave this field blank if the committee is not associated with any event. If this field is blank then the <Event Volunteers> button is disabled (you cannot click on it).
Committee Type	You can use this code to organize committees. Create new codes by using the Committee Type Code Entry screen. Press [F9] to access a list codes that your organization has created. You can leave this field blank if your organization does not associate codes with committees.
Responsibilities	A free text field where you can enter alphanumeric characters. This text also displays on the Subcommittee tab.
Positions Tab	<i>Use this tab to define specific positions needed for the committee. The positions that you enter on this tab determine the list of positions that a committee member can be assigned in the Committee Volunteer Entry screen. That is, if the position is not listed in this tab, then you cannot link the position to the committee member.</i>
Position code	You can use this code to determine the positions that are available to assign to members. Create new codes by using the Volunteer Position Code Entry screen. Press [F9] to access a list of codes that your organization has created. You can leave this field blank if your organization does not use codes for positions.

Managing Events

Number Needed	The number of committee members or the number of people you need for the specific position.
Term Limit	A text field where you can enter any alphanumeric characters to capture any term restrictions or time limits for members for specific positions.
Commitment Required	A text field where you can enter alphanumeric characters to capture the minimum requirements such as number of hours, number of days, or number of sessions.
Meetings tab	<i>Use this tab to define the meeting schedule for the committee. Each line represents a meeting.</i>
Meeting Date	Enter the date of the meeting in MM/DD/YY format. You can press [F9] to select from the calendar or press [F4] for today's date.
Meeting Time	Enter the time of the meeting in HH:MM AM (or PM) format. For example, for 9 am, enter 09:00 AM.
Location	You can use this code to determine meeting locations. Create new codes by using the Location Code Entry screen. Press [F9] to access a list of codes that your organization has created. You can leave this field blank if your organization does not use codes for locations.
Meeting Notes	A text field where you can enter alphanumeric characters to capture any additional information about the meeting.
Subcommittees tab	<i>Use this tab if you want to see the hierarchal structure of committees and all subcommittees.</i>
	Find a Master committee to view the hierarchy. The hierarchy is not displayed if you are viewing a subcommittee that has no other linked subcommittees. The Responsibilities window displays any corresponding text that was entered for the committee on the Details tab.

See Also:

[Managing Committee Volunteers](#)

Managing Committee Volunteers

Use the Committee Volunteer Entry screen to maintain a list of your committee members for specific committees. You can designate a member as Active or Past, assign a position and designate a date or date range that identifies when the member is serving on the committee. To use this screen, identify a committee first by entering the committee name in Find Committee Volunteers window. If the committee is associated with an event, then the Event code is displayed on the top right of the screen.

This screen is a simplified version of the [Volunteer Schedule Entry screen](#) and works the same way:

- To add a member press [F6] or the new icon from either the Volunteers or Details tab. If you add a member by mistake, remove him or her by highlighting the record on the Volunteers tab and click Shift [F6] or the Delete icon in the TA toolbar.
- Click <Committees> (on the Volunteers tab) to access the Committee Entry screen and view details about the specific committee you are working with.
- The list of **Positions** from which you can choose depends upon what is entered on the Committee Entry screen.

- Sort or filter the list of committee members by using the column buttons on the Volunteers tab and the fields directly above the buttons.
- Update the fields on the Details tab according to what you want to track for committee members:

Contact Information displays the member's preferred address, telephone, and email. You may zoom to the corresponding data entry screen to update or view additional information.

Enter the **Start Date**, **End Date**, and the **Comments** field according to your organization's business practices.

Use the **Status** field to designate whether the committee member is Active or Past.

Working with the Volunteer Schedule Screen

Use the Volunteer Schedule Entry screen to designate the particular people or groups who volunteer with the event or who generally work for your organization apart from any event. (Use the [Committee Volunteer Entry](#) for those who are serving on committees.) When you designate someone as a general or event-specific volunteer you schedule him or her and use the **Stage** field to manage whether they are tentative, volunteered, canceled, or were a no show. Use other fields such as **Hours Worked** and **Position** to capture more details.

Note: For event-related volunteers, your organization decides whether an interaction record is created if you move the volunteer (or group of volunteers) from stage to stage. For general volunteers, TA automatically creates interaction records using the Volunteer (VO) Interaction Category and the Volunteer Schedule (VSCHED) Interaction type codes.

- Use the Collapse and Expand Groups buttons: to view either summary of the group volunteer record or to view all guests/volunteers that are associated with a group of volunteers. For example, if you select 'Collapse Groups', you see 'ABC Company (3 Volunteers)'. If you select 'Expand Groups', you see one line 'ABC Company (3 Volunteers)', and underneath it, indented, you see the specific volunteers.
- By default if you click <Volunteers> from the Event Overview screen TA displays the collapsed view of volunteers for the event. The Statistics tab (Event Overview) includes a total count of the number of volunteers for the event.
- The Volunteer Schedule screen displays the **Scheduling tab** if you are working with event-related volunteers. Use this tab to schedule volunteers if you have set up shift/position combinations on the Event Overview screen.
- Click on any column heading to re-sort the volunteer records that display in the Volunteers tab. Use the drop-down filter field (above the column heading button) to limit the records to those with a specific value. For example, to view only volunteers with a specific position, set the field to that position and TA displays only volunteer records with that position. Re-set the filter back to <All> to see all records. Similarly, use the first filter field on the left to find a specific volunteer or group. Enter the name in this

field. When you tab, TA displays the volunteer records that correspond to the name that you entered.

Volunteer Management Tasks:

[Scheduling Volunteers](#)

[Finding Volunteers](#)

[Updating Volunteer Information \(Volunteer Schedule Entry\)](#)

[Volunteer Information you can Capture](#)

Scheduling Volunteers

Use the Volunteer Schedule Entry screen to schedule general volunteers for your organization or those volunteers linked to a specific event. You can schedule individuals or a group at a time.

- **Group volunteer records** share basic scheduling information such as Shift, Position, Stage, Hours Worked, etc. Create multiple group volunteer records for the same organization if you need to differentiate scheduling information for individuals within a group. For example, if Company ABC is sending 10 people where 5 people are on one shift and 5 people are on another shift, create two volunteer records for Company ABC.
- Also for group volunteer records, **TA automatically creates relationship records** (if they don't already exist) between a specific volunteer and the group account. For example, if you schedule an individual under the Company ABC account, TA creates VOL/GROUP relationship record. If you view either any Account Overview screen for Company ABC or for the individual you can view this relationship.
- Any volunteer that is set to the **'Tentative' Stage** does not affect the Filled, Open, or Total Needed fields on the Scheduling tab of Volunteer Schedule Entry nor does it affect the # Needed, # Scheduled, and # Worked fields on the Shifts/Positions tab of Event Overview.

Scheduling General Volunteers (not event-related)

From the Volunteers or Details tab, click the <New> button.

Enter the fields in the Details tab according to what you want to capture for the volunteer record (see [field descriptions](#) for more information). At a minimum you must enter the **Account ID** to specify who is serving as a volunteer. Press [F9] in the Account field to find or create an account. TA displays the contact information on the account after you select or create it. (TA automatically sets the Stage field to Scheduled when you add a volunteer record.)

If you are scheduling a group of volunteers: use the **Groups** section of the Details tab. You may enter either an Account if the volunteer is in TA and/or you want to create an account or you may enter only the **Name** field *without* having to create an account. In the Name field, enter the First and Last Name of the group member. You may enter individual names or placeholder text such as Volunteer 1, Volunteer 2. (TA automatically puts

the guests name in the lastname, first name format on the Volunteers tab.)

Scheduling Event-Specific (or Day-of Event) Volunteers

1. Find the event for which you want to schedule volunteers.
2. **If you have created Shift and Position combinations on the Event Overview screen:**
Click on the Scheduling tab. It displays a line for each date, shift, position combination that is set up for the event and lists how many volunteers are needed in addition to the ones already scheduled (Total Needed), how many have been scheduled (Filled), and how many are needed (Open). Click on a date, shift, position combination for which you want to schedule the volunteer or group of volunteers.

Enter fields on the Schedule Volunteers window according to if you are scheduling an individual or a group. Click on a Schedule radio button first, then enter the Account ID that corresponds to the individual or group that you are scheduling.

You can enter the Start and End Time if the volunteer is starting or ending at a different time than those set up for the shift or if you do not have a specific time set up for the shift. (You can update these fields later in the Details tab.)

If you are scheduling a group, remember to enter the number of volunteers you are scheduling. When you tab from the # field, TA enters placeholder text to the Group Members block. You can type over the default and find or create an account or enter the names of group members if you don't want to create an account. Refer to [field descriptions](#) for more information.

You can click <New> from the Volunteers tab (or from the Details tab) if you do not have Shift/Position combinations or do not want to use the Scheduling tab:

TA navigates you to a blank Details tab.

- Enter the fields in the Details tab according to what you want to capture for the volunteer record (see below for field descriptions). At a minimum you must enter the **Account ID** to specify who is serving as a volunteer. Press [F9] in the Account field to find or create an account. TA displays the contact information on the account after you select or create it. (TA automatically sets the Stage field to Scheduled for general or event-related volunteers.)

Removing a Volunteer

If you add a volunteer by mistake, remove the volunteer record (you are not removing the account, just the volunteer record) by highlighting it and clicking Shift <F6> or by clicking the delete icon. After you confirm your choice to delete, TA removes the record from the screen and any interactions records that were a result of the scheduling.

Finding Volunteers

Use the Volunteer Schedule Entry screen to find general volunteers for your organization or those volunteers linked to a specific event. If you click <Volunteers> from the Event Overview screen TA displays the collapsed view of volunteers that are specific to the event.

- To find a specific volunteer or group, enter the name in the top left filter field (above the Volunteer or Groups heading). When you <Tab> from the field, TA displays all names corresponding to what you entered.
- Click <Find> to find volunteers for another event or your organization's general volunteers.

Use the Find an Event window to identify the event for which you want to find corresponding volunteers. Press [F9] in the Event field or search for the event based on Date Range, Type, Group, or Fiscal Year.

Use the Find General Volunteers window to access a list of volunteers according to Work Date Range. You can press [F9] to access a calendar in both of the date range fields. If you leave the End Date Range field blank, TA finds volunteers who are scheduled within the date range (inclusive). If you leave both fields blank, TA displays all general volunteers.

Related Topics:

[Scheduling Volunteers](#)

[Updating Volunteer Information \(Volunteer Schedule Entry\)](#)

[Volunteer Information you can Capture](#)

Updating Volunteer Information

Below are examples of what you can do to maintain volunteer information after you have added an individual or group volunteer record in the Volunteer Schedule Entry screen:

- Update the Stage field to reflect the volunteer's actual activity. For example, update this field to Volunteered, Cancel, or No Show.
- Remove a volunteer record from the screen: On the Volunteers tab, highlight the record and click <Delete> or press [Shift] [F6]. TA provides a confirmation message asking if you are sure. TA also removes the interaction record if it was created.
- Reschedule: On the Details tab change the Work Date, Shift, Start/End Times, Session Time, or Position fields according to the volunteer's availability.
- Create another volunteer record for the same or different accounts: You can schedule the same volunteer again or add another individual or group. See [Scheduling Volunteers](#) for the instructions.
- Capture the hours actually worked: Update the Hours Worked field on the Details tab. Note that TA updates this automatically when the stage field is changed to Volunteered. You can change this field to reflect the hours the volunteer actually worked.

- Update contact information for a volunteer record: On the Details tab, zoom to any of these data entry screens: Name Entry, Address Entry, Telephone Entry, and E-mail Address Entry, by pressing [F10] from any of the corresponding fields. From the data entry screens you can update or add new information for the volunteer account.

Volunteer Information you can Capture

You can enter or update the fields listed in the chart below on the **Details tab** in the **Volunteer Schedule Entry** screen.

Also, on the Details tab you can navigate to the data entry screens that correspond to the contact information. For example, you can zoom to Name Entry, Address Entry, Telephone Entry, and E-mail Address Entry, by pressing [F10] from any of the corresponding fields. From any of the data entry screens you can update or add new information for the volunteer account.

Field Name	Description
Captain	If scheduling a group, enter the Account ID and corresponding Name of the group's captain. Note that this does not schedule the captain.
Work Date	Enter the date for which you want to schedule the volunteer. (It defaults to today's date.) You can press [F9] to select the date using the calendar. If you are working with a multi-session event, when you press [F9] TA displays the dates of each session. If you use the Schedule tab, TA enters this date according to the shift/position for which you scheduled the volunteer. You cannot leave this field blank.
Session Time	This field is used for event-related volunteers. You can press [F9] if there are multiple sessions for the specific work date. If you use the Schedule tab, TA enters this field according to the shift/position for which you scheduled the volunteer.
Shift	This field displays only for event-related volunteers. You can press [F9] and assign the volunteer to a shift that has been set up using the Event Overview screen. You can also update this field from the Volunteers tab. If you use the Scheduling tab, TA enters this according to the shift/position for which you scheduled the volunteer.
Position	If your organization has created position codes to capture volunteer jobs you can press [F9] in the Details tab and assign the volunteer a position. You can also update this field from the Volunteers tab. Note that if you have set up shift/position combinations and you have a value in the Shifts field, when you press [F9] you see a limited list (only those set up for the shift). If the Shift field is blank then you see a list of all position codes.
Stage	TA automatically sets this field to 'Scheduled' when you add a volunteer record. Also, if you update the Hours Worked field TA automatically sets this field to 'Volunteered.' Press [F9] and set this field to any of these values: Canceled, No Show, Scheduled, Tentative, and Volunteered.
Start and End Time	Enter the time for which you are scheduling the volunteer or group. You can change this field according to the actual time that the

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	volunteer is working. This field may default if you set up shifts with start and end times.
Hours Worked	Enter the number of hours that the volunteer or group worked. You can only edit this field if Stage is set to 'Volunteered.'
Comments	Enter free text information based upon your organization's business practices.
Group Members	<p>If you are scheduling a group, you can use this section of the screen to specify names of individuals in the group. It is not required that the group member have an account. That is, you can enter only the Name field or you use the Account field to specify an account. In the Name field, if you do not know the names, you can enter placeholder text such as 'Volunteer 1.' The text you enter defaults when you use the Scheduling tab (event-related volunteers only) and enter the number of volunteers coming for a group.</p> <p>Or, use the Account field to find or create an account for the group member.</p> <p>TA automatically creates relationship records (if they don't already exist) between a specific volunteer and the group account. For example, if you schedule an individual under the Company ABC account, TA creates VOL/GROUP relationship record. If you view either any Account Overview screen for Company ABC or for the individual you can view this relationship.</p>

Maintaining an Event To-Do (or Reminder) List

If you want to keep a running list of tasks, use the Planning tab (Event Overview). When you enter a task, TA creates a follow-up reminder (also known as a tickler). The reminder begins as of the date listed in the **Start Date** field and is sent to the user specified in the **Staff** field. If you (or another user) have finished the task, enter a date in the **Stopped Date** field and TA will automatically set the reminder to C (for completed). If you just want to keep a running list of tasks without the reminder/tickler feature, enter the item set the **Status** to C (for completed).

TA creates interactions with EV (Event) as the Interaction Category and PLAN (Event Planning) as the Interaction Type for ticklers created through the Planning tab in the Event Overview screen. The Event code is captured on the interaction as well.

The Open Ticklers screen displays all of your tickers/reminders that have a status of Open. If you specify a user other than yourself in the Staff field, then the item appears on his or her Open Tickler screen.

Related Topics:

[The Open Ticklers Screen](#)
[Open Tickler Listing Report](#)

Managing Registrants, Participants, or Prospects

Click <Registrants> from the Event Overview screen or select Registration Entry from the Main Menu to handle tasks that relate to managing those people who will attend or whom you want to attend the event. If there are no registrants yet, TA displays the message: "No matching registrants were found. Re-enter find criteria, create new record, or exit?" Click <New> to add a new registrant. Click <Find> if you want registrants for a different event.

For an event that is set up with multiple sessions, you can find those who are registered for the whole series or for a particular session. TA displays the Find and Event: Multi-part Event window if you access a multi-session event.

- Select a particular session if you want to update attendance for the session or remove a registrant from the session.
- You cannot directly add a registrant to one particular session. You must add registrants to the whole series. If you need to remove someone from a particular session, find the session, highlight the registrant, and click [Delete].
- You can right-click in the list-block portion of the screen and access these options: Account (to navigate to the Account Overview screen for the account highlighted), More (to access the Details tab), Lookup (to get a list of values if you are clicking in field with an LOV). If you right click anywhere in the top of the screen, you can add the Registration Entry screen to your Favorites menu.

See Also:

[Adding Registrants \(or their guests\), Participants, or Prospects Using the Participant Tab \(Registration Entry\)](#)
[Using the Details tab \(Registration Entry\)](#)
[Using the Attributes Tab \(Registration Entry\)](#)
[Using the Tasks tab \(Registration Entry\)](#)
[Finding Registrants](#)

Adding Registrants (or their guests), Participants, or Prospects

You can add any existing account to the participant list from the Registration Entry screen. If the account (such as a company) is sending multiple people but for those people you only have their names (they do not yet have an account in TA), you can add these guests on the Detail tab of the registrant's record.

Guests are added to the list of participants and are displayed for example, as: Smith, John (guest of ABC Company).

To add a new participant to the event listed on the Participant tab, click <New> on the TA toolbar. To add a participant to another event you can find that Event or double click on a blank line in the Participant tab, and then specify the Event when TA brings you to the [Details tab](#).

You can also use the [Create Registrations](#) update procedure if you want to add a group all at once.

Using the Participant Tab (Registration Entry)

This tab lists participants (or prospects) according to the event that you have previously selected. Use the horizontal scroll bar to see the Pledge or Paid Amount or the Account ID for a registrant. To find a list for a different event or across multiple events, click <Find> on the TA toolbar. See [Finding Registrants](#) for more information.

- The **totals at the bottom of the screen** pertain to the list of participants that you selected. That is, the totals change if you have filtered this list (only looking at one team for example) or if you are looking at a list across multiple events.
- If you click on other tabs such as Details, Gifts & Pledges, or Attributes, TA brings you to the corresponding screen of *the registrant that you have highlighted in the Participant tab*. For example, if you have Jane Smith highlighted, then when you click on the Gifts & Pledges tab, TA displays transactions that pertain to Jane Smith.
- If you are viewing a particular session of a multi-session event (that is you are not viewing the whole series), you can only update attendance or remove a participant from this list. You cannot directly add a registrant to one particular session, you need to add the registrant to the whole series and remove him or her from the particular session(s).

Task	Quick Summary
To add a new person to the list	Click <New> on the TA toolbar. TA brings you to the Details tab where you can specify contact information, employer, or guests.
To remove a person from the list	Highlight the line on the Participants tab and click <Delete>. TA provides an alert asking you to confirm your choice. Note that you cannot remove a registrant if there is a processed transaction for the event.
For an event that is set up with multiple sessions	<p>You can find those who are registered for the whole series or for a particular session. TA displays the Find and Event: Multi-part Event window if you access a multi-session event.</p> <ul style="list-style-type: none"> • Select a particular session if you want to update attendance for the session or remove a registrant from the session. • You add registrants to the whole series. If you need to remove someone from a particular session, find the session highlight the registrant, and click [Delete]. TA sets the Stage field to DELETE.
To find one person in the list	Click in the blank line above the Participant column and enter the name of the person or company. If you are searching for an individual, use the 'lastname,first name' search format. You can use % as well.
Filter the list	Use the drop down list above the Stage , Att? , and Team columns. For example if you want to see only those on a certain team, select the team from the drop down list above the Team column. TA displays a list of only those who are associated with the Team that you selected. Reset any of these drop down lists to <All> if you want

	to see all registrants.
Sort the list	Click on any button column heading to re-order the list. The default sorting is alphabetical by last name. If you click on the Participant tab, TA resorts the list in reverse alphabetical (that is last names starting with Z are listed first). If you click on any of the column headings twice, TA switches the sort order to the reverse. Note that you can use the Sort tab in the Find Registrants window to specify up to 3 levels of sorting.
Update Stage, Team, and Attendance	<p>Highlight the line that corresponds to a participant, and press [F9] in the Stage or Team fields. Select from the list of values accordingly.</p> <ul style="list-style-type: none"> • If you have user privileges set up, you can create a new team by selecting <Add New Team>. Make sure to verify your organization's naming convention best practices before you create a new Team code. • Mark the Att? checkbox to indicate that he or she attended the event. (Note that the <<Event Progress Report>> displays the number of names that are at any stage for one or multiple events.) Note: You may update attendance for a group of registrants that are selected by a query if you use the Update Registrations update procedure. • If you update Stage: Depending on how your event is configured, you might get prompted to create a new interaction record. Select the Interaction Category and Type according to your organization's business practices.

Using the Details tab (Registration Entry)

This screen displays the name and contact information, employer (if known), Team and whether they are a captain (if applicable) and any guests that the participant might be bringing to the event.

- Press [Page Down] to scroll to the next registrant's detail information.
- The Comments field is a text field where you can add additional information that is not captured in any other fields on this screen. Enter this text field according to your business practices.

General Uses of this Screen	
Add a new registrant	Click <New> and specify the Event (if it isn't already displayed in the Event field). Specify an account in the Account field (press [F9] to find it or create a new account). Name, Address, Phone, and Email is displayed according to the Account ID displayed in the field. Update the Registration Detail information if necessary.
Add guests with the registrant	Use the Participants block to add any guests that the registrant is bringing to the event. You do not have to create an account for each guest if you only know the names of people (but not their address). In the Name field, enter the First and Last Name of the guest. (TA automatically puts the guests name in the lastname, first name format on the Participants tab.) If you do know the address information of the guest, we recommend that you do create the new account (if it doesn't exist) so that

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	you can mail to them in the future. Press [F9] in the Account field, to find an existing account or to create a new one.
Updating contact information	TA displays the default preferred Address, Phone, and Email information for the registrant. You can click in the Name, Address, Phone or Email fields and press [F9]. You select the particular record to be displayed or you can create a new record. For example, if you are in the telephone field, and select <Add New Phone> TA navigates you to the Create New Phone window where you can enter the number. Or, if you want a different phone number to be displayed select it from the list of existing numbers.
About the Employer Information	If the registrant has an existing EMP/ORG (Employee to Organization) relationship record, the Employer fields automatically default. You can change the employer listed, or update the field by finding the employer's account (press [F9] in the Account field to find or create a new account) or by entering the employer's name (and address if known) in the Name and Address fields. <i>You do not have to create an account for the employer.</i>

About the Fields in the Registration Details block:

Field Name	Description
Date	Registration date. This date defaults to today's date when you add a new registrant. Update this field if necessary.
Team Captain	Use these fields if the registrant is part of team or is serving as a captain. Press [F9] in the Team field and select from the list of values. This list of teams is specific to the event (that is not all teams are listed) if your organization has set up team codes that are linked to events. This is the same field that is displayed on the Participants tab. When you update here, the update is also reflected in the list of participants. Mark the Captain checkbox if the individual is a team captain.
Stage	Press [F9] in this field and select from the list of values if the participant's status changes with respect to the event. This is the same field that is displayed on the Participants tab. Depending on how your event is configured, you might be prompted to create a new interaction. Select the Interaction Category and Type according to your business practices.
Source	Enter a source code if your organization tracks how the registrant heard about the event. You can also use the Technique field for this purpose. Note that entering a source code here does not serve as the default source code that is used when you process a payment for this registrant. You must enter at least the first few characters of the source code before you can press [F9] to select from the list.
Technique	Use this field if you want to track the method by which the registrant contacted you about this event. (Use this field in conjunction with Source according to your business practices. It can accommodate situations where the same source is used for different techniques.) Press [F9] to select from your organization's list of available technique codes.

About the Fields in the Benefit (Prize) block:

Use these fields if your organization has designated event benefits on the [Event Overview \(Benefits tab\)](#) screen.

Field Name	Description
Requested	Press [F9] and select from the list according to the registrant's request. If you

	<p>specify <Standard> or <Alternate>, then when you run the Award Event Benefits procedure, TA evaluates the benefit request and awards the corresponding benefit based on how your organization has set up the Benefits tab on the Event Overview screen. (The procedure will also update the Awarded and Awarded Date fields to the specific benefit and the date TA evaluated the benefit for awarding.)</p> <p>Select <None> if the registrant has declined the benefit.</p> <p>Select <Exception> if you do not want TA to manage the process of awarding the benefit and to indicate that you have manually handled this registrant's benefits. Consider using the Comments field to add more information.</p> <p>Select a specific benefit if your organization does not designate benefits as <Standard> and <Alternate>. The Award Event Benefits procedure evaluates whether the registrant qualifies for this benefit and updates the Awarded field accordingly.</p>
Awarded	<p>TA updates this field to the specific benefit that he or she requested and that they have qualified for when you run the Award Event Benefits Procedure. You can press [F9] to select a specific benefit if your organization wants to manually track the benefit that was given to the registrant.</p>
Date Awarded Date Selected Date Delivered	<p>TA updates Date Awarded according to when you ran the Award Event Benefits procedure and when the benefit was awarded. You can enter a date if your organization wants to manually track this date. (If there is a date entered in this field then the Award Event Benefits procedure will not evaluate the requested benefit.)</p> <p>Date Selected represents the date that the benefit was selected for fulfillment. You can use the Update Registration procedure with a registration query to have TA enter this field. Leave this field blank if your organization does not need to track this date.</p> <p>Date Delivered represents when the benefit was delivered to the registrant (this might be several days after it was selected for fulfillment). Leave this field blank if your organization does not need to track this date.</p>

See Also:

[Setting Up Teams for Events](#)

Setting Up Teams for Events

Use the Team Code Entry screen to add or edit teams that can be specified when you register a participant for an event. You can organize teams into types (such as corporate, family & friends, clubs, etc.), designate a captain, and a related account (such as the company), and identify a hierarchy of teams where several local teams can be rolled up to a local company, which can then rolled up to a regional company, which is then rolled up to a national company. If you will be organizing teams into hierarchies, create the 'master' teams first. Here are the field descriptions for instructions on using the fields in the Team Code Entry screen.

Field Name	Description
Basic tab	
Description	Enter any text to provide a more description about the team.
Type	Press [F9] to select from the list that your organization has created. You can use this field to identify teams as corporate, family, clubs, places of worship etc. You can leave this field blank if your organization does not create team type codes.

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Captain	Enter the Account ID of the person serving as the team captain. Press [F9] to find the account or you can leave this field blank if you do not have this information.
Related Account	Enter the Account ID if there is account such as a corporate account that is sponsoring or serving in some key way to the team. You can leave this field blank if you do not have this information or if it's not relevant to the team.
Comments	Enter any text information that provides more details about the team.
Events, multirow block Team is allowed for:	Use this field to determine the list of values that displays in the Team field on the Registration Entry screen. Instead of seeing all of the teams when you press [F9], the user will only see team codes that are associated with the event. Enter the specific events for which this team corresponds. Enter as many event codes as is necessary. Press [F9] to select the event codes that your organization has created. If you want the team code to be displayed for all events, select ' All events. ' If you want the team code to be displayed only for the specific events listed in the multirow block, specify " Selected events " in this field.
Hierarchy tab	
Parent Team	Use this field if you want to organize teams into a hierarchy. Press [F9] and select the master or higher level team if the team you are working with is sub-team. You can enter unlimited levels of the hierarchy, however teams cannot be part of more than one hierarchy. That is, a team can be in only one parent team.
Hierarchy view	If you are viewing a team that is part of a hierarchy, TA displays the level in an organizational tree format.

Using the Attributes Tab (Registration Entry)

This is where you enter Registrant and Participant-related Information. The top part of screen includes information that you might ask on registration forms. Enter each line according to what you want to track for each registrant. The specific information on this tab depends upon the defaults and options set up on the Event Type.

If there is an asterisk (*) next to the question or line, it means that the information ties back to the account. If the information already exists then it is displayed. For example, if Birth Month, Day, and Year appear and the person has already provided this to you, then his or her birthday is already filled in. If it is blank and you enter it in, then this is added to his or her name record (Biography tab on the Name Entry screen).

Note: You cannot fill out the top part of the screen for guests. The top part of the Attributes tab is for registrants only (not participants who are guests of the registrant).

The bottom part is event-related information that you need to know for each participant. Important: Use the drop down list and enter the info for the registrant and each guest, if applicable.

Use the **Comments** field to capture general information about the participant or guests that you cannot enter anywhere else.

Using the Tasks tab (Registration Entry)

What is available on this tab depends upon the event type that you are working with and your user privileges. For example, you may be able to run the Event Roster report or run labels from this tab. Your system administrator set up what displays based upon event type. If you have not been granted access to a particular task (even if it was set up to display on the tab) then it is not listed.

Finding Registrants

Click <Find> from the Registration Entry screen. TA provides the Find Registrants window where you can choose to display registrants for one event or across multiple events. You can filter the list so that you only see registrants for a particular team or those assigned a particular stage.

Using the Find Registrants Window

If you want a list of registrants across multiple events, make sure you mark the **Find registrants across multiple events** checkbox (bottom of window). If this checkbox is unmarked and you click <Find> with any field (or fields) filled in, TA displays the Find an Event: Selected Events window where you select a particular event. TA finds registrants according to the Event that you selected and the fields you entered on the Find Registrants window.

- If the checkbox is unmarked, you can find a particular event by entering any of these fields and clicking <Find>: **Date Range, Type, Group**. Press [F9] in either the Type or Group field to access a list of values. The Date Range field corresponds to the Start and End Dates that are entered on the Event Overview screen.
- In the **Event** field you can enter a specific event code (press [F9] for the list), or enter a partial code and use the wildcard character (%). Use % method (along with marking the checkbox) if your organization has a standardized naming convention if you want to find registrants across multiple events. For example, if your organization's naming convention for bike tours always begins with BikeYYYY, then you could find all of the registrants for 2002 by entering BIKE2002% and marking the **Find registrants across multiple events** checkbox.

Filtering and Sorting the List of Registrants

The fields on the Registrants tab let you find a particular registrant or participant or those on a particular Team, at a particular Stage, or only those who have or have not been marked as attended.

A note on the difference between a Registrant and Participant: A registrant is defined as the account that has signed up and will pay the registration fee. Much of the time the registrant and participant are the same. However, if a person or organization is registering and not planning on attending but sending (and paying for) guests instead, then the registrant and participant are different people/entities.

- To find those on a particular Team or who are assigned a stage, press [F9] in the **Team** or **Stage** fields and select from the list of values.
- To find a registrant or participant, enter the name in either the **Registrant** or **Participant** fields. Use the format last name, first name. You can enter only a last name or last name, first initial.

For organizations, enter the name of the organization (without 'The' or other articles).

- To find only those who have or have not attended, set the **Attended?** field to Y or N.

For Events Set up with Multiple Sessions

You can find those who are registered for the whole series or for a particular session. TA displays the Find and Event: Multi-part Event window if you access a multi-session event.

- Select a particular session if you want to update attendance for the session or remove a registrant from the session.

Using the Sort Tab (Find Registrants Window)

On the Participants tab you can click on any column heading to sort the list according to the heading. If you click twice on a heading, the sorting will switch between A-Z, Z-A, or if amount fields, between highest - lowest, lowest - highest. The Sort tab on the Find Registrants window, lets you sort up to 3 levels including the primary sort. Your choices are: Participant/Guest, Registrant/Host, Team, Stage.

Entering Gifts, Pledges, Pledge Payments, or Soft Credits (Event-Related Transactions)

You can enter transactions that relate to registration fees, pledge forms (pledge and pledge payments), sponsors, incentive dollars (soft credit transactions) from the registrant or from his or her check writers.

See Also:

[Quick Transaction Entry: Using the Gift & Pledges Tab Summary of How to Create a Transaction](#)

Quick Transaction Entry: Using the Gift & Pledges Tab

Use this tab on the Registration Entry screen to enter any gifts, pledges, or pledge payments from either the participant or from his or her sponsors. The Gifts and Pledges (middle of screen) area displays all of the transactions that have been applied toward the Registrant's fundraising goals. These gifts or pledge transactions can be from the registrant **and** from sponsors.

Note: If your organization awards incentive dollars if a participant recruits volunteers or other participants, you can process soft credit transactions that should be applied toward the fulfillment of his or her pledge obligation. You must configure soft credit types so that this feature can be used according to your business practices. (Access the [Soft Credit Type Code Entry](#) screen to create your codes and activate the feature.)

Make sure you implement a business practice to **release** and post transactions that were created through Registration Entry. Transactions must be posted before they appear on reports and on the Giving History screen.

- Click <Batch Entry> only if you need to add information such as Benefits that are not automatically awarded or a payment method other than check or credit card (such as in-kind donations where you need to zoom to add more information). Also, if you need to access any fields that are available through

zooming on a particular field (such as matching gifts), you must click <Batch Entry>.

- If there is a previously created pledge transaction (PL), then the <Payments> button is enabled. Click on this to view the transactions that were previously created or to add a new payment. (Refer to [Entering Pledge Payments.](#))

Summary of How to Create a Transaction

- To process a pledge payment against a pledge transaction that has already been processed, refer to [Entering Pledge Payments](#)

Use **Batch#** to add an item to an existing batch or create a new batch. Press [F9] in this field and select an existing batch or select <Add New Batch>.

- If you select <Add New Batch>, TA takes you to the Find a Batch window on the Batch Summary screen. To create a new batch, click <New> and then <Create>. Set up your batch and enter Target Totals. **After you have created the batch, click <Exit> to return to the Gifts & Pledges tab.**

For more information about setting up a batch see [Entering the Batch Totals](#). Note that another user may enter batch totals (and release the batch) after the batch is created.

In the **Donor** field, press [F9] or enter the Account ID that corresponds to the gift, pledge, pledge payment or soft credit you are processing. When this transaction is processed, it is applied to the Registrant's fund raising goals and it is also displayed on the Giving History screen of the particular check writer (or sponsor).

Enter **Pledge \$** only if you are entering a Pledge transaction. You can enter both **Pledge \$** and **Paid \$** if the pledge includes a first payment that you are processing. Enter only Paid \$ if you are processing a pledge payment, a gift, or a soft credit.

Enter the remaining fields according to the transaction you are processing. You can press [F9] in most fields.

- If you want to manually award a specific benefit based on this transaction, or you need to enter other fields that are not available, click <Batch Entry> to access the [Batch Detail Entry screen](#). Note that benefits that are set up to automatically award will be added to the account when the transaction is posted.
- Use the **Package** field according to your business practices. When you press [F9] you see only event-specific benefit packages that are set up on the [Benefits tab \(Event Overview\)](#).

To add another transaction for the participant (or from sponsors of the participant), click <New> (or press [F6]) and enter the next donor in the **Donor** field. If you want to enter another transaction for a different participant, select the participant on the Participant tab and click on the Gifts & Pledges tab.

See Also:

[Entering Pledge Payments \(Registration Entry\)](#)

Entering Pledge Payments (Registration Entry)

To process a pledge payment from an individual other than the registrant (from check writers or sponsors for example), the registrant's pledge transaction must be previously processed.

TA automatically sets the Gift Type field to TP (third party) if the pledge payment is from someone other than the registrant.

1. Highlight the corresponding PL transaction and click <Pledge Payments>. Previously processed payments are listed in this window (the P column is marked)
2. Enter information in the fields below according to the specific payment. To add another pledge payment, click on a blank line.

Batch # - add item to an existing batch or create a new batch. Press [F9] in this field and select an existing batch or select <Add New Batch>.

If you select <Add New Batch>, TA brings you to the Find a Batch window in the Batch Summary screen. To create a new batch, click <New> and then <Create>. Set up your batch and enter Target Totals. **After you have created the batch, click <Exit> to return to the Gifts & Pledges tab.**

For more information about setting up a batch see [Entering the Batch Totals](#)
Note that another user may enter batch totals (and release the batch) after the batch is created.

Account and Name: Enter an Account ID or press [F9] to find the account of the donor. Press [F9] in the name field to specify an individual other than who is listed by default.

Date: This defaults to today's date. Change it if you want to change the gift date.

Pay Amount: Enter the payment amount or the amount of soft credit that should be awarded.

Source: This defaults based on the pledge transaction. You can override the default and specify a different source code of the transaction. Enter the first few characters and then press [F9]. If you need to access any field that displays on the Source Information window, you must click <Batch Entry> and zoom on the Source field.

SC: This is the Soft credit type field. Press [F9] and select a soft credit type if you are creating a soft credit transaction that will be used to credit against the pledge. Note that your organization must configure each soft credit type in order for it to be used to fulfill a pledge. Without any configuration, you can create separate soft credit transactions that are not linked to a pledge.

Configuring Your Events

This section is for the system administrators who will be creating the codes mentioned in the [overview section](#).

This section will not cover how to add meal codes, expense codes etc. but will cover suggested order (sequence) of set up and using two key set up screens: Attribute Definition Entry and Event Type Code Entry.

[Suggested Sequence of Setting Up Your Events Environment Using the Attribute Definition Entry Screen](#)

[About the Type Code Entry Screen](#)

Suggested Sequence of Setting Up Your Events Environment

Using many of the code entry screens that pertain to the Events Module depends upon other codes that have already been setup. Here is a suggested order of how to proceed with configuring your events.

Registration Stage Code Entry, Interaction Category, and Interaction Types:

These codes must be created before you can use the Event Type Code Entry screen to set up important features and defaults for events. You can use only Stage codes to track a participant or prospect or you can have TA create interactions (using your category and type combinations) when a participant or prospect is moved from one stage to another.

[Attribute Definition Entry](#) Determine what you need to track for the event as a whole, for each registrant, and for each participant. Once you set up these values, you specify the event-level attributes you want for each Event Type. The registrant/participant-level attributes can be assigned by Event Type or to a specific Event.

Optional : Create [Custom Copies of Reports](#) or of the Query and Output Processing – Events Procedure: If you want to offer customized versions of standard reports set them up so that you can add them to the Tasks tab in the Event Overview and Registration Entry screens. Create custom copies of the events query & output procedure if you want your users to [generate files \(such as labels or name tags\) from the Tasks tab](#). These tasks are assigned according to Event Type.

[Event Type Code Entry](#) This is a key area where you create event type codes and set up options and default when a user works with an event that corresponds to the event type.

[Soft Credit Type Codes](#): If you want special soft credit types to be used toward fulfillment of a participant's pledge or other codes to segment the different soft credits your organization tracks, use the Soft Credit Type Code Entry screen.

These codes can be set up in any order. If they are not created then users cannot enter them in the Event Overview screen.

Location Codes

Expense Codes

Participation Codes (linked to Key Accounts or interaction records created as result of Stages)

Position Codes (pertains to Volunteers)

Benefit Codes

Project Codes

Meal Codes

See Also:

[Setting Up Tasks to Run Files](#)

Setting Up Tasks to Run Files

Here are the steps to follow if you want users to be able to generate event-related files from the Main Menu or from the Tasks tab (Event Overview or Registration Entry) based upon standard queries and outputs that you have previously set up:

1. Create a query that selects the records that you want. For example, all accounts with a stage of 'Register' for an event. Note: Unless you want to create a query for every event, consider parameterizing the Event field. That is, instead of having a query line ' Event = ABC' ; use this parameterized feature to use a placeholder for the Event :**p_event** ; When you actually run the query/output, TA lets you fill in the Event field. See ['Parameterized Queries'](#) for more information.
2. If you haven't done so already, use the User-Defined Output Entry screen to create your files.
3. Create QOS (query and output schedule) record that specifies your query and all of the files or outputs that you want the user to be able to generate.
4. Go to System Preference, User Group Preference, or User Preference Administration screen depending upon if you want all, a group, a specific user to be able to generate the file. Select the **Procedures** tab and then select **Query and Output Processing – Events**.

Click <Save As...> and name the operation according to the File and Query combination that will be helpful for your users when they select from a list of tasks.

Set the preference fields to default: It is important to specify the **Query Name** that you created in Step 1. Otherwise, users will have to select the correct query. If you want the event field to default, set it accordingly. This field will default if users are generating files (that is using this copy of this operation) from the Tasks tab. You can hide parameters from users to simplify the screen. Set the AWS column to N for fields that you do not want to display to the user.

Click <Save> before exiting the Preference Administration screen.

A copy of the operation is automatically placed at the end of the list of operations in the Events and Volunteers module. (You can use the Menu tab in preference screens to change the order that it displays.)

Repeat Steps 1 – 4 for every file (or outputs) that you want users to be able to run separately.

To add the customized operation to the **Tasks tab** use the [Event Type Code Entry](#) screen.

Using the Attribute Definition Entry Screen

Use this screen to create information that you want to track on an event as a whole, per registrant, or per participant. You must create the attributes first before you can assign them to an event type (that is, before they can be used by an event manager) or assign them to a particular event.

Note: You can also use this screen to capture additional information on [Service Providers](#), [Interactions](#) (survey that displays on the Inquiry and Referral screen) and, [Transaction Benefits](#).

When you create attributes under the Events Table, an event manager can enter the information on the **Attributes** tab in the **Event Overview** screen. Create Event attributes to track information that pertains to the whole event such as Number of Balloon Bouquets?, Number of Tables or Chairs, Date Food Must be Ordered, etc.

When you create attributes under the Event_REG table, an event manager can enter the values (the answers) on the **Attributes** tab in the **Registration Entry** screen. (You can assign the specific registrant attributes based on Event Type or use the Event Overview screen to specify the attributes to be used for a specific event.) You have the choice to display the information on the registrant-level (top of tab) or on the participant-level (bottom of tab).

Click <Manage Attribute Groups> after you have finished creating attributes or if you want to view the attributes that are already assigned to an event type.

- To find all of the existing Event-level attributes, click <Find>, and type or select EVENTS in the **Attribute Table** field. (Leave the **Attribute** field blank.) Then click <Find>.
- To find all existing registrant or participant-level attribute, click <Find>, and type or select EVENT_REG in the **Attribute Table** field. (Leave the **Attribute** field blank.) Then click <Find>.
- To create a new attribute at either the event or registrant/participant level, click <New>. In the Attribute Table field, select either EVENTS or EVENT_REG according to the information that you want to track either on the event or registrant/participant level. Enter the name of the new attribute in the **Attribute** field. This is the name that will display in the list block and in the list of values when you assign the attribute to an event type. Event managers do not see this name when they work with an event or a registrant. (They will see the 'Prompt Text'.)
- If you make changes to an existing attribute then those changes are automatically reflected on the corresponding screens. For example, if you adjust the prompt text then the new text is displayed on the Event Type Code Entry screen and displayed on the Event Overview screen if the existing event uses the attribute. If an attribute value was previously entered, TA does not remove the value even if the validation changed.

See Also:

[Attribute Definition Entry Field Descriptions](#)

Attribute Definition Entry Field Descriptions

Field Name	Description
Description	This text displays in the list of values when you press [F9] in the Attribute field (when finding a specific attribute). Enter text that will help you easily identify the attribute when you are searching for a particular one.
Prompt Text	This is the field text that displays to the user. For Event related attributes this text displays on the Other tab on the Event Overview screen or on the Attributes tab on the Registration Entry screen. For benefit related attributes, this text displays to the user in the Batch Detail Entry screen when he or she presses <Alt> [F10] while highlighting a particular benefit Enter clear text so that your users know what information is being tracked. For interaction related attributes, this text displays in the Questionnaire

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	<p>block on the IRV or Media Entry screens.</p> <p>For service provider attributes, this text displays on the Attributes tab in the Service Provider Entry screen.</p> <p>Note: limit your text to about 30 characters so it is not truncated on the screens.</p>
<p>Validation</p> <p>_AR = any code with a status of Active or Reserved (A or R)</p> <p>_NOTD = any code that does not have a status of Deleted (D)</p>	<p>Press [F9] to select how you want the data entry to be validated. That is, select according to what you want to be required to enter in the field. For example, if you want to require that up to 10 free text characters be allowed in the field, select 10_CHAR or if you want to require a date (in MM/DD/YY format), select CALENDAR_DATE_ENTRY.</p> <p>You can also use existing tables in TA so that the user can press [F9] and select from this list. For example, if you select CHARITY in this field, then when your user presses [F9], he or she will access a list of all charity codes.</p> <p>If you want the Attributes tab in the Registration Entry screen to display the list of benefits that you specify on the Benefits tab (Event Overview): Create an Event_Reg attribute named 'Benefit', and make sure that the validation is Event_Benefit. (Then make sure that the Benefit Attribute is assigned to the event type.) Note that there are other options for configuring event-related benefits (or prizes). See Benefits Tab (Event Overview) for more information.</p> <p>Similarly, if you want Meals to be selected (and validated against) the list of meal codes that are entered on the Others tab, create an Event_Reg attribute named 'Meal', and make sure that the validation is Event_Meals.</p>
Hint	This text displays on the bottom left of the screen when the cursor is in the prompt text field that you created for the attribute. Enter text that provides additional information about what keys to press or the exact text that you want entered in the field.
Replace Expression block	This area of the screen can be used to control dynamic defaulting of options where a field default depends upon where the user has navigated from. Please consult TSI before you use these fields.
Optional checkbox Allow checkboxes	These checkboxes work in conjunction with the Validation field. Mark any of these checkboxes according the data entry requirements of the attribute that you are setting up.
For each Attendee	<p>You can mark this field only for registrant/participant level attributes (EVENT_REG table).</p> <p>If unmarked, TA displays the attribute on the top of the Attribute tab in the Registration Entry screen. Leave this field unmarked to track information on the <i>registrant</i> level. Note: if a registrant is bringing guests (guests do not have to have accounts in TA), then you cannot capture this for the guests.</p> <p>If marked, TA displays the attribute on the bottom of the Attribute tab in the Registration Entry screen. Event managers can enter the information on the <i>participant</i> level. Mark this checkbox if you want to track this information for every registrant and guests (if any) of the registrant.</p>
Update Field	Use this field if you want TA to display or update account information. If

	<p>this information is already entered for the account, then TA automatically displays it. If you update the field on the Attributes tab, then the change is reflected on the person's account. Note for event registration related attributes: if a guest does not have an account in TA, then the attribute will not be listed for that person.</p> <p>This field is limited to displaying or updating this information (note that you can use any or all of these): Age Range, Birth Day, Birth Month, Birth Year, Gender, Political Party Note for event registration related attributes: TA puts an asterisk (*) in front of the field if you use one of these fields to display on the Attributes tab (either top or bottom of screen).</p>
Status	<p>This field defaults to 'A' (for Active). Set this field to 'D' (for Delete) or 'I' (for Inactive) if the attribute was entered by mistake or if you no longer will be using a particular one.</p>

About the Event Type Code Entry Screen

This is an important screen to use since the settings on each of the tab pages determine the fields and options on the Event Overview, Registration Entry, and Volunteer Schedule Entry screens. The Event Type Code Entry screen is where you select the stages that are tracked, whether TA automatically creates an interaction record if a registrant (or Volunteer) is moved to that stage, the attributes that display and items displayed on the Tasks tab on the Event Overview and Registration Entry screens.

Using the Event Type Code Entry screen involves setting up the defaults and options according to event type. A user is required to specify an event type when creating a new event (from the Event Overview screen). At a minimum, you must use the Event Type Code Entry screen to create event type codes.

Before you can effectively use the Event Type Code Entry screen, please make sure that you already have:

- Created Stage Codes - use the Registration Stage Code Entry screen. The Volunteer Stages are pre-defined (you do not have to create these codes.)
- Determined your organization's business practices regarding the Interaction Category and Interaction Type code combinations to be used to track a registrant's migration from one stage to another. Create these codes if they don't already exist.

Also, determine whether you want TA to automatically create the interaction record or if you want TA to prompt the event manager to create the record. If you choose to prompt him or her, then you can default an Interaction Type or leave the field blank and require that the user enter the Interaction Type code field.

- Determined a list of common reports or main menu operations that will be helpful for an event manager based upon the type of event (or for any event). If necessary, you can create custom copies of reports where you can adjust the report name and report parameters according to the specific needs of your staff. For example, you can have two different versions of the Team Analysis report, rather than requiring the event manager to change the parameters each time he or she runs the report.

About the **Query All Registrants** checkbox: If this is **unmarked** TA provides a choice when you find registrants to Find All or to find a subset (filter). If this checkbox is **marked** then TA automatically displays all registrants. For events where you have thousands or hundreds of registrants, it is helpful to display a filtered list. For smaller events, mark this checkbox.

Users can always click <Find> on the Registrant Entry screen to find a subset or adjust sorting of the registrants.

See Also:

[Using the Event Type Code Entry Screen to Configure Events](#)

Using the Event Type Code Entry Screen to Configure Events

Create or find the event type code that you want to work with. The codes correspond to the general categories of events that your organization runs. Examples include: client programs, fundraising events, weekend (multi-day), one day events, Walk-a-thons, and Bike Tours. Create event type codes according to the structure of your organization's events.

- To find all existing event type codes, click <Find>, and leave the **Code** field blank. Then click <Find>. Work with one event type at a time by highlighting the record in the list block.
- To create a new code, click <New> and assign a 2-digit code. Click <Create>. In the **Description** field, enter a text description that will help the event manager find an event or create a new event.

Using the Registration or Volunteer Stages Tabs: Use either of these tabs to align stage with interaction record creation. Note that having TA create interaction records is optional. You can just use the Stage field on the Registration Entry or Volunteer Schedule Entry screens to track the stage and skip interaction creation if you want.

- Press [F9] in the **Stage** field.
- If you want TA to create interaction records when a person is moved to that stage (from the Registrant Entry screen) specify the **Interaction Category** and **Type**. Mark the **Interaction Create?** check box if you want TA to automatically create the interaction. Or, mark the **Prompt?** check box if you want TA to prompt the user to create an interaction record. You can leave the Interaction Type field blank if you want the user to select the type.
- Edit the **Summary** field if you do not want to accept the default wording. This text displays in the Summary field on the Interaction record.
- If you need to remove a line, highlight it and press <Shift> [F6].
- DELETE is a reserved stage that TA assigns when you remove a registrant from a particular session of a multi-session event.
- Order of the Stage codes: By default when a user enters a new registrant, TA defaults the stage according to the stage that is listed first on the Event Type Code Entry screen. To change the

order, highlight the row and use the UP or DOWN arrows on the right side of the screen.

Linking Registrant Stage and Key Accounts or Participation: You can set up an event so that a Key Account entry is automatically added if you assign a registrant a stage of your choice. You must link the stage to the (EV) Interaction Category and the Key Account (KEYACCT) Interaction Type code.

- Create a stage of your choice (For example, if you create a stage called SPONSOR).

Mark the Create Interaction checkbox and select EV/KEYACCT for an interaction category/type. (Mark or unmark the Prompt checkbox according to whether you want to ask the user whether to create an interaction or not.)

If you want to further link a Participation Code to the key account, press [F9] and select a participation code according to your business practices.

- If you want any interaction that is created as a result of a particular stage to include the Participation Code, you must mark the Create Interaction checkbox and select the participation code that you want associated with the stage.

Using the Event Attributes and Registrant/Participant Attributes Tabs:

Move the attributes to the **Selected Attributes** side of the screen if you want to add the attribute to the Event Overview or Registrant Entry screens. The attributes listed on the left side (**Available Attributes**) are all of the attributes that you created using the [Attribute Definition Entry screen](#).

Using the Tasks Tab: Items entered on this tab become available on the Tasks tab on the Event Overview and on the Registrant Entry screens. Click **Add Task...** to identify standard or custom reports that you want to be easily available to your event manager(s). The list of values displays all screens, reports, and operations (including custom versions) that you have user privileges to access. Select from the list according to what you want users to be able to access. Note that if a particular user does not have access to an operation that you have selected, it does not display on the Tasks tab for that user. That is, he or she does not see the particular task.