



# Managing Events in Aegis CRM



Aegis Premier Solutions is committed to maintaining the highest standards and providing exceptional service to our nonprofit clients. We are a leading provider of nonprofit services such as caging, donor management, merchant services, and acquisition funding.

Our suite of products offers an end-to-end solution from acquisition funding to donation processing and the management of donor and campaign data. We help you work smarter and make it simple. Let Aegis Premier Solutions help you focus your time on fulfilling your non-profit's mission!

The Aegis brand includes three unique companies – Aegis Premier Solutions, Aegis Processing Solutions and Aegis Premier Technologies – that have joined forces to provide our clients with an A to Z suite of services to help navigate through the various aspects of fundraising.

Security is at the forefront of our business mission. Your organization and your donors can rest easily knowing information is secure in state-of-the-art data centers, monitored 24/7/365. Our experts ensure your system is always up-to-date, correctly configured, and is PCI DSS compliant.

## Table of Contents

<b>Get Started with Events</b> .....	<b>5</b>
<b>Plan an Event</b> .....	<b>5</b>
<b>Create an Event</b> .....	<b>6</b>
Enter General Information .....	6
<b>Add Acknowledgements to an Event Record</b> .....	<b>8</b>
<b>Event Ticket Wizard</b> .....	<b>11</b>
<b>Add Volunteer Shifts to an Event Record</b> .....	<b>14</b>
<b>Assign Volunteers to Event Shifts</b> .....	<b>15</b>
<b>Attach Documents to an Event Record</b> .....	<b>16</b>
<b>Locate an Event Record</b> .....	<b>17</b>
Search for an Event Record .....	17
<b>Navigate an Event Record</b> .....	<b>18</b>
The General Tab .....	19
The Acknowledgements Tab .....	19
The Tickets Tab .....	20
The Volunteer Staff Tab .....	20
The Sponsors Tab .....	21
The Inventory Tab .....	22
The Documents Tab .....	22

<b>Copy Event Details</b> .....	<b>24</b>
<b>Add Costs</b> .....	<b>25</b>
<b>Add an Event Activity</b> .....	<b>26</b>
<b>Add Event Tickets</b> .....	<b>28</b>
<b>Register Event Attendees</b> .....	<b>30</b>
Create a Batch .....	30
Enter Data in the Batch .....	31
<b>Export the Staff Assignments List</b> .....	<b>32</b>
<b>Export the Attendee List</b> .....	<b>32</b>
<b>Complete Staff Assignments</b> .....	<b>33</b>
<b>Import the Attendance File</b> .....	<b>33</b>
<b>Generate Event Reports</b> .....	<b>35</b>
Summary Report .....	35
Event Cost Details Report .....	35

## Get Started with Events

The event record contains information you can use to track costs as well as the registrants, attendees, and sponsors who participate in these activities. In addition to tracking these details, you can also manage the acknowledgements, tickets, and documents created for the event. If you need volunteers to work your event, you can add work shifts and then assign volunteers to fill available slots.

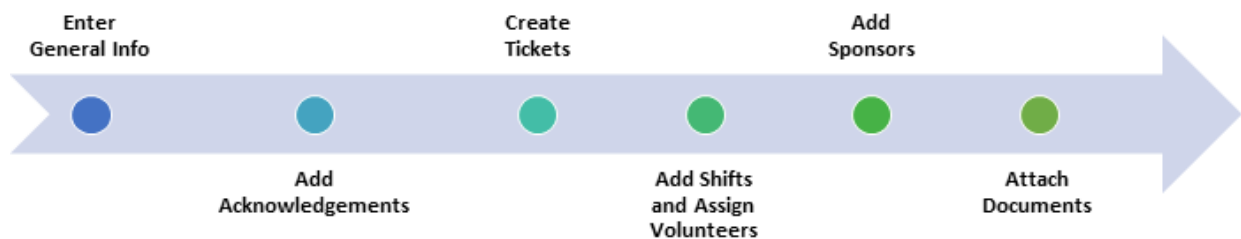
### Plan an Event

Before creating a new event in **Aegis CRM**, you should determine the details of your event. The following table identifies the details and provides space for you to add your information.

Detail	Information
Date and Time	
Location(s) and Vendor(s)	
Projected Income	
Default Fund	
Groupings (Event Type & Fiscal Year)	
Expected Costs	
Acknowledgements	
Activities	
Tickets	
Volunteer Roles and Staff	
Sponsors	
Invitees	

## Create an Event

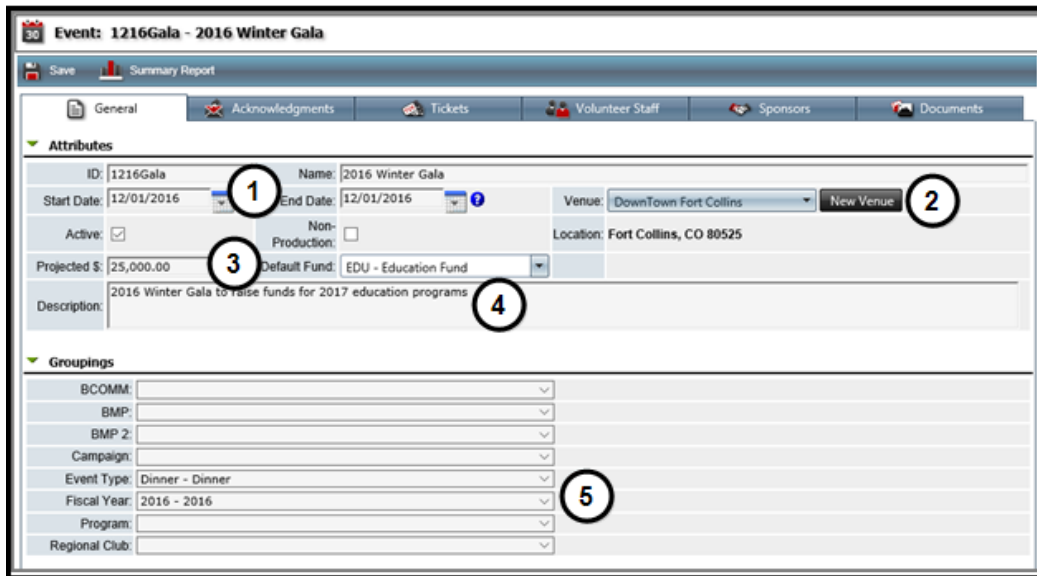
The event record contains information you can use to track the costs as well as the registrants, attendees, and sponsors who participate in these activities. In addition to tracking these details, you can also manage the acknowledgements, tickets, and documents created for the event. If you need volunteers to work your event, you can add work shifts and then assign volunteers to fill available slots. The graphic below shows the process for adding new event records to **Aegis CRM**.



To create a new event in **Aegis CRM**, click **Events** on the Navigation menu and then select **New Event**.

### Enter General Information

On the **General** tab you identify the attributes, groupings, costs, and notes for the event.



**Event: 1216Gala - 2016 Winter Gala**

Save Summary Report

General Acknowledgments Tickets Volunteer Staff Sponsors Documents

**Attributes**

ID: 1216Gala Name: 2016 Winter Gala

Start Date: 12/01/2016 End Date: 12/01/2016 Venue: DownTown Fort Collins New Venue

Active:  Non-Production:  Location: Fort Collins, CO 80525

Projected \$: 25,000.00 Default Fund: EDU - Education Fund

Description: 2016 Winter Gala to raise funds for 2017 education programs

**Groupings**

BCOMM:

BMP:

BMP 2:

Campaign:

Event Type: Dinner - Dinner

Fiscal Year: 2016 - 2016

Program:

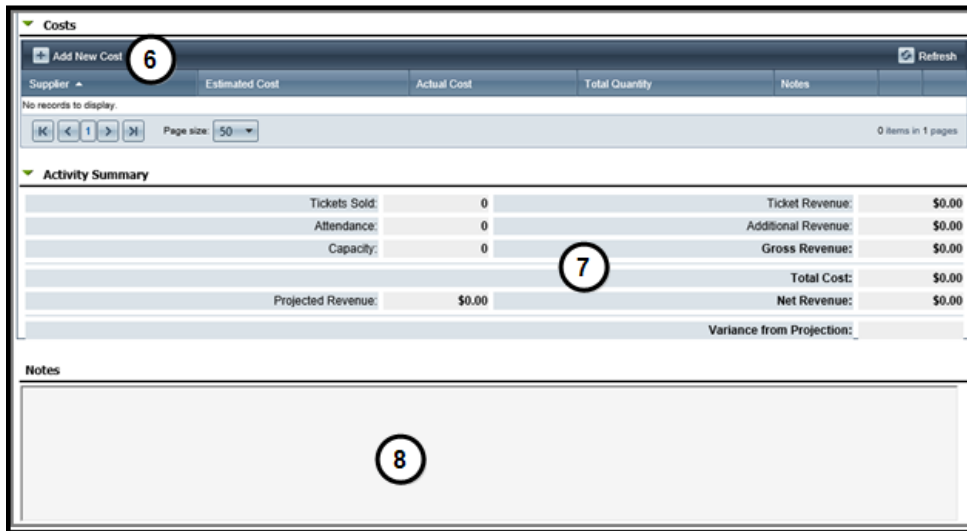
Regional Club:

1. Enter the event **ID** and **Name** as well as the **Start Date** and **End Date**.

Tip: You should follow the established naming conventions documented in the policies and procedures at your organization for the event **ID** and **Name** fields.

2. Select the **Venue** from the list of locations available in **Aegis CRM**. If the venue does not display, click **New Venue**.
3. Enter the projected income amount and then select the **Default Fund** used for tracking income received from the event.
4. Enter a description for your event.
5. Select the **Event Type** for grouping the details of the event.

Tip: The groupings you select are available when creating queries and generating reports.



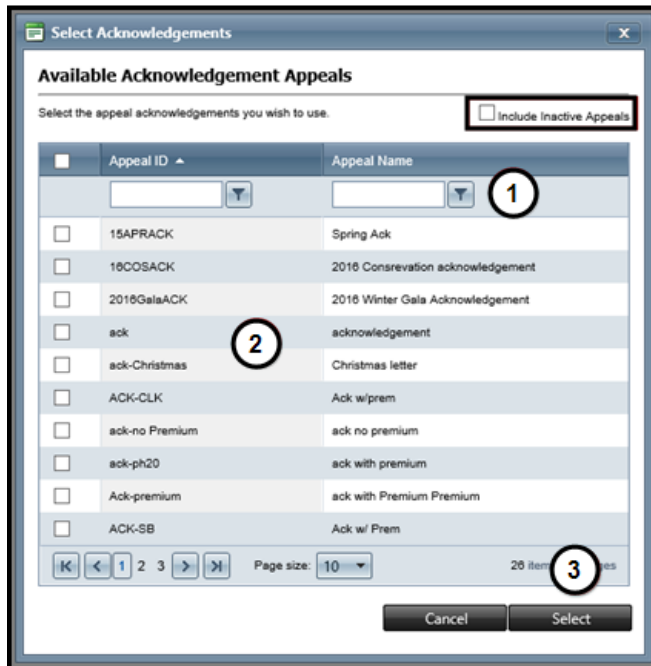
6. Click **Add New Cost** to add expenses for the event.
7. View a dashboard of the performance metrics including number of tickets sold, revenue generated from the sold tickets, and total cost of the event.
8. Enter any additional information about the event in the **Notes** area.
9. Click **Save** on the Menu bar.

## Add Acknowledgements to an Event Record

On the Acknowledgements tab of an Event record, you can add an appeal acknowledgement from the available acknowledgements or establish rules to create conditional acknowledgements.

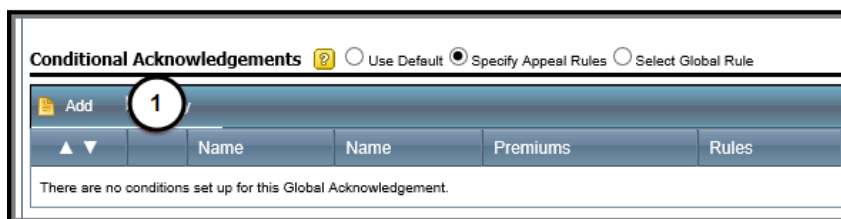
To add appeal acknowledgements, select the **Acknowledgements** tab, click **Add** in the **Available Acknowledgements** section, and then follow these steps:



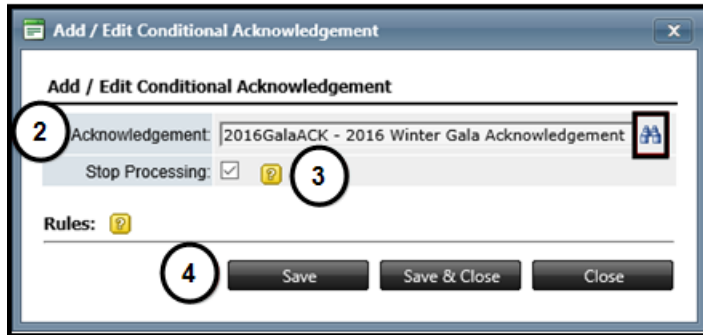


1. Enter an **Appeal ID** or **Appeal Name** to search the results that display and then click the **Filter** icon to select the criteria to use.
  - a. Mark the **Include Inactive Appeals** checkbox to include them in your search.
2. Mark the checkbox for the acknowledgement appeal to add for the event.
3. Click **Select**.

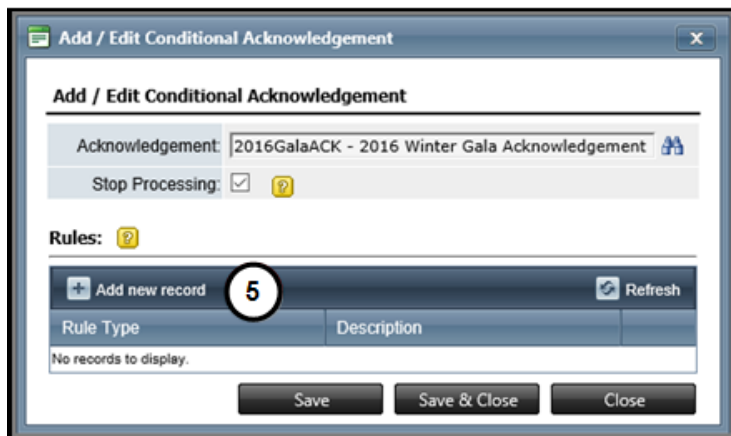
To create rules for conditional acknowledgements, select the Acknowledgements tab, click **Specify Appeal Rules**, and then follow these steps:



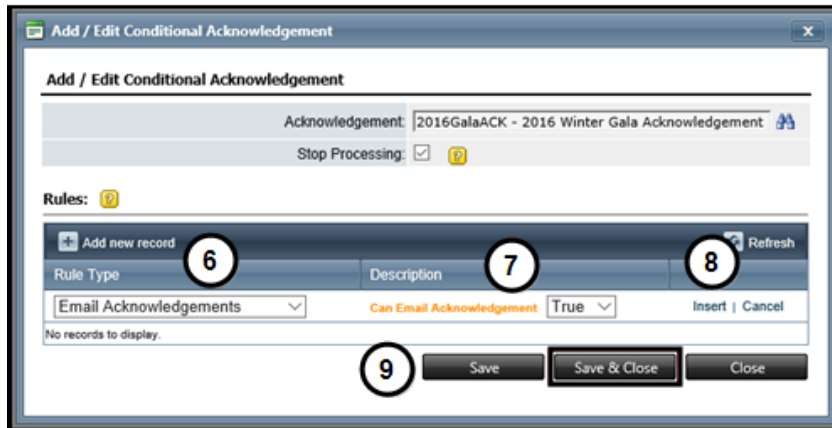
1. Click **Add**.



2. Click the **Search** icon to locate the acknowledgement.
3. Mark the **Stop Processing** checkbox to stop other acknowledgement rules from processing if this rule is true.
4. Click **Save**. You must save now in order to add the rules.



5. Click **Add new record**.



6. Select the **Rule Type** to apply for the acknowledgement.
7. Select the criteria for the rule.

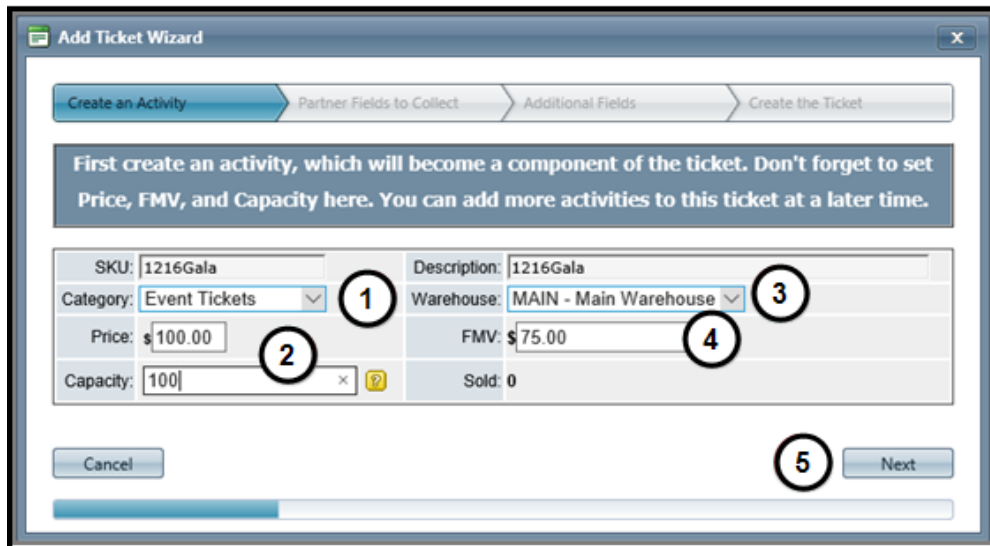
**Note:** The criteria available in the Description column depends on the type of rule you selected in step 6.

8. Click **Insert** to add the rule.
  - a. Repeat steps 5 through 8 to add more rules.
9. Click **Save & Close** to add all of the rules for the conditional acknowledgement.

## Event Ticket Wizard

On the Tickets tab of an Event record, you can add activities that become a component of the ticket and determine what information to collect during the registration process. This information allows you to communicate event updates to those who register and track their attendance on the Event record.

To create tickets, select the **Tickets** tab, click **Let's Do It** when prompted to use the wizard for creating a ticket, and then follow these steps:



**Add Ticket Wizard**

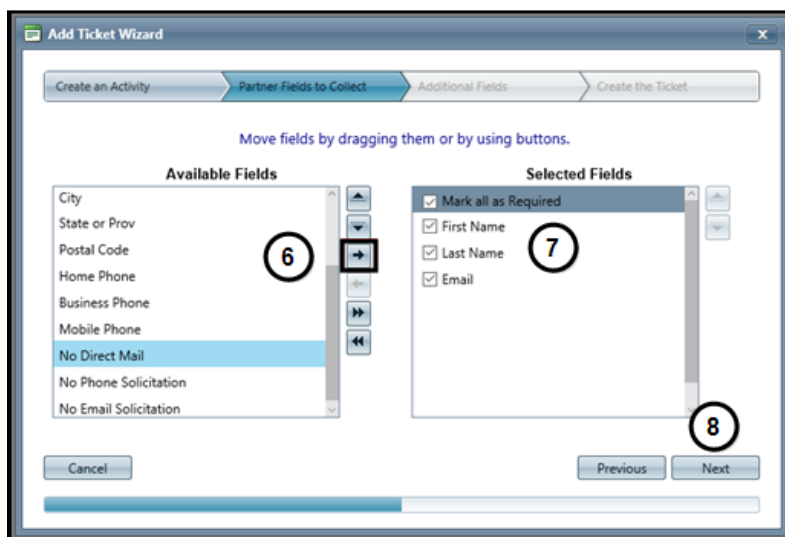
Create an Activity → Partner Fields to Collect → Additional Fields → Create the Ticket

First create an activity, which will become a component of the ticket. Don't forget to set Price, FMV, and Capacity here. You can add more activities to this ticket at a later time.

SKU: 1216Gala	Description: 1216Gala
Category: <b>Event Tickets</b> (1)	Warehouse: <b>MAIN - Main Warehouse</b> (3)
Price: \$100.00 (2)	FMV: \$75.00 (4)
Capacity: 100	Sold: 0

Cancel (5) Next

1. Select **Event Tickets**.
2. Enter a ticket price and establish the maximum number of these tickets available to sell.
3. Select the **Warehouse** responsible for shipping the tickets.
4. Enter the **FMV** (Fair Market Value) for the ticket that can be claimed as a tax deduction.
5. Click **Next**.



**Add Ticket Wizard**

Create an Activity → Partner Fields to Collect → Additional Fields → Create the Ticket

Move fields by dragging them or by using buttons.

Available Fields (6)	Selected Fields (7)
City	<input checked="" type="checkbox"/> Mark all as Required
State or Prov	<input checked="" type="checkbox"/> First Name
Postal Code	<input checked="" type="checkbox"/> Last Name (8)
Home Phone	<input checked="" type="checkbox"/> Email
Business Phone	
Mobile Phone	
No Direct Mail	
No Phone Solicitation	
No Email Solicitation	

Cancel Previous Next

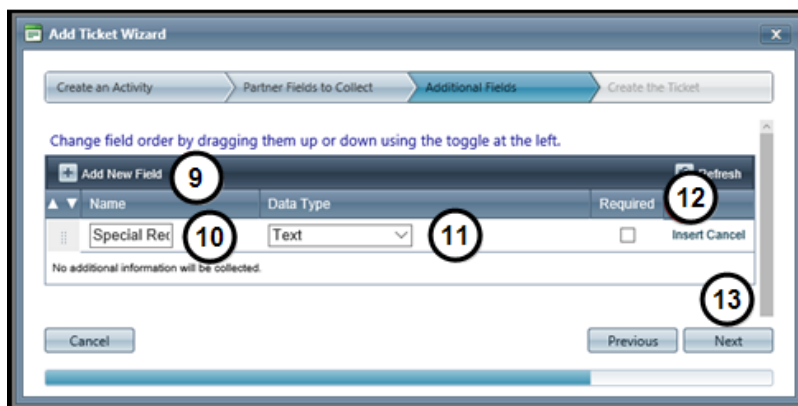
6. Select a field in the **Available Fields** pane and then click the right arrow button to add it to the **Selected Fields** pane. Repeat this step to add more fields.

**Note:** The items in the **Selected Fields** pane represent the information to be collected from someone who registers for the event.

7. Mark the checkbox for each field to require that the information be collected during event registration.

**Tip:** Mark the **Mark all as Required** checkbox to require that all of the information in **the Selected Fields** pane be collected from a registrant.

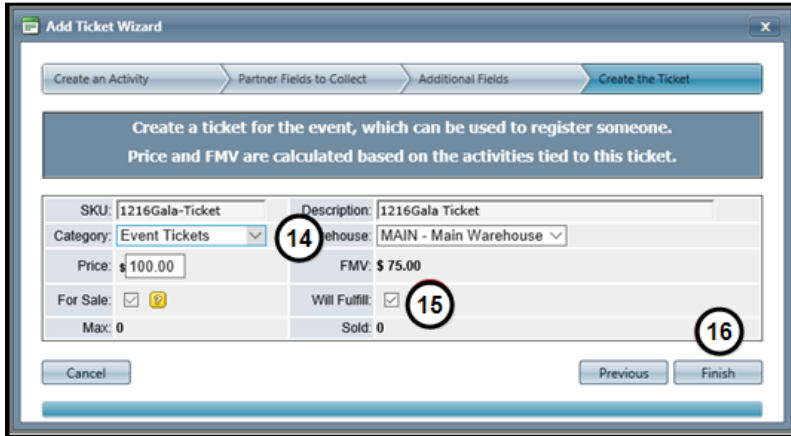
8. Click **Next**.



9. Click **Add New Field**.
10. Enter a name for the field.
11. Select the **Data Type**.

Example: In the above graphic, a Special Request text field will be available for anyone who needs assistance or has specific dietary requirements. The Required checkbox is not marked because this information is not applicable to all event attendees.

12. Click **Insert**.
13. Click **Next**.



14. Select **Event Tickets** in the **Category** field.
15. Mark the **Will Fulfill** checkbox to send the ticket order to the warehouse.
16. Click **Finish** to create the ticket for this activity.

### Add Volunteer Shifts to an Event Record

When you add volunteer shifts you define the needed role, determine the date as well as the start and end times, and identify how many volunteers you need.

To add volunteer shifts, select the **Volunteer Staff** tab on an Event record and then follow these steps:



1. Click **Add new shift**.
2. Select the role.

**Note:** The roles displayed are those available in your database.

3. Enter or click the **Calendar** icon to select the **Date**.
4. Click the **Clock** icon to select the **Start Time**.
5. Click the **Clock** icon to select the **End Time**.
6. Enter the number of individuals needed for the role.
7. Click **Insert**.
  - a. Repeat steps 1 through 7 to add more shifts.

### Assign Volunteers to Event Shifts

After shifts are added to the event, you can assign volunteers to the shifts. To assign volunteers to shifts select the **Volunteer Staff** tab, click **Add New Staff Assignment** and then follow these steps:

1. Locate the volunteer to assign to the shift.



Partner ID	Name	Address	Company	Start Date	
40876735	Carlos & Sara Guerrero	3908 Sunstone Ct Fort Collins, CO 80525-5612	Bernard Data Solutions	2016-05-07	Select
40877023	Carlos Guerrero	3908 Sunstone Ct Fort Collins, CO 80525-5612		2016-05-17	Select
40877024	Carlos Guerrero	Matching Gift 3908 Sunstone Ct Fort Collins, CO 80525-5612		2016-05-17	Select

2. Click **Select** for the volunteer to assign to the shift.



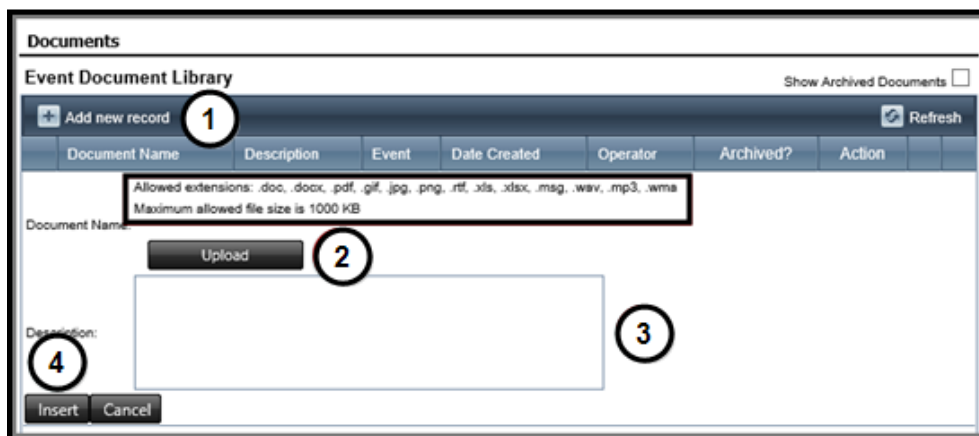
Shift	Volunteer ID	Name	Phone	Email	Completed	Mark Completed	Remove
- Select a Filter -							
Set Up Crew -- 12/01/2016, 03:00 PM - 05:00 PM	77023	Carlos Guerrero	970-452-6295		<input type="checkbox"/>	Insert	Cancel

3. Select the shift.
4. Click **Insert**.

**Note:** The shifts that display are those that have been added to this event only.

## Attach Documents to an Event Record

On the Documents tab, you can add attachments for the event. Documents can be uploaded to **Aegis CRM** in a text, graphic, audio, and video format. To attach documents, select the **Documents** tab and then follow these steps:



The screenshot shows the 'Documents' section of the Aegis CRM interface. At the top, there is a 'Documents' header and an 'Event Document Library' section. A 'Show Archived Documents' checkbox is visible. Below this is a table with columns: Document Name, Description, Event, Date Created, Operator, Archived?, and Action. A '+ Add new record' button is circled with a '1'. Below the table, a text box for 'Document Name' is shown with a circled '2' next to an 'Upload' button. A tooltip above the text box lists allowed extensions: .doc, .docx, .pdf, .gif, .jpg, .png, .rtf, .xls, .xlsx, .msg, .wav, .mp3, .wma and states 'Maximum allowed file size is 1000 KB'. Below the 'Document Name' field is a 'Description:' label and a text area, with a circled '3' next to it. At the bottom left, there is an 'Insert' button circled with a '4' and a 'Cancel' button.

1. Click **Add new record**.
2. Click **Upload** to attach a file from your computer.
  - a. Allowed formats include doc, .docx, .pdf, .gif, .jpg, .png, .rtf, .xls, .xlsx, .msg, .wav, .mp3, .wma and the maximum file size is 1000 KB.
3. Enter information about the attached file.
4. Click **Insert**.

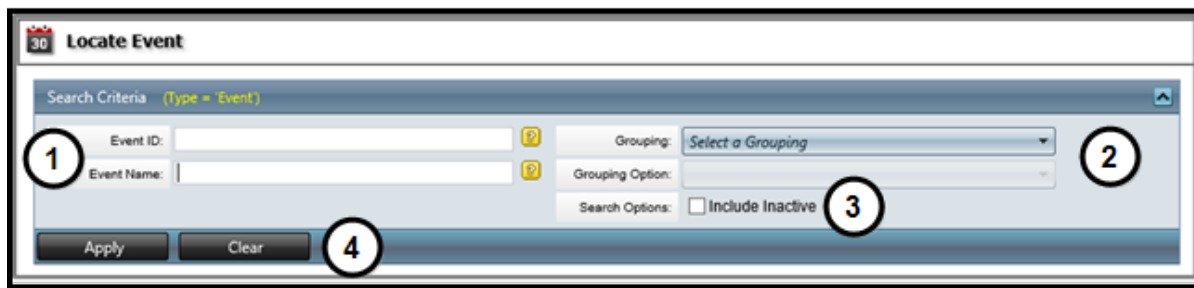


## Locate an Event Record

The event record contains information you can use to track the details and manage costs associated with these activities. To view these records, you can locate and open an event record in **Aegis CRM**.

### Search for an Event Record

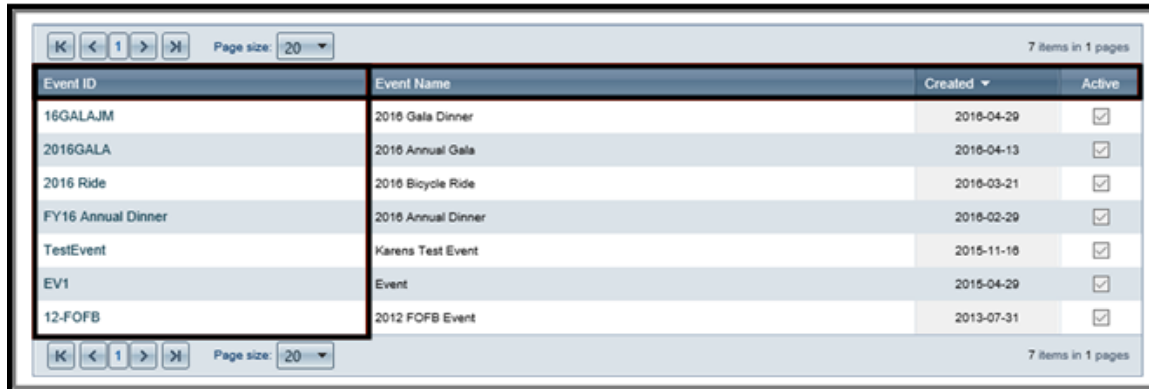
Click **Events** on the Navigation menu and then select **Locate Event**. On the Locate Event page, follow these steps:



The screenshot shows the 'Locate Event' search interface. It features a search criteria section with two input fields: 'Event ID' and 'Event Name'. To the right of these fields are two dropdown menus for 'Grouping' and 'Grouping Option'. Below these is a checkbox labeled 'Include Inactive'. At the bottom of the search criteria section are two buttons: 'Apply' and 'Clear'. Numbered callouts are placed as follows: 1 is over the 'Event ID' field, 2 is over the 'Grouping' dropdown, 3 is over the 'Include Inactive' checkbox, and 4 is over the 'Apply' button.

1. Enter the **Event ID** or **Event Name**.
2. Select the **Grouping** to limit your search to specific categories. After selecting the grouping, you can select the **Grouping Option** from the list of available options.
3. Mark the **Include Inactive** checkbox to also search inactive event records.
4. Click **Apply**. To perform another search, click **Clear** and repeat the above steps.

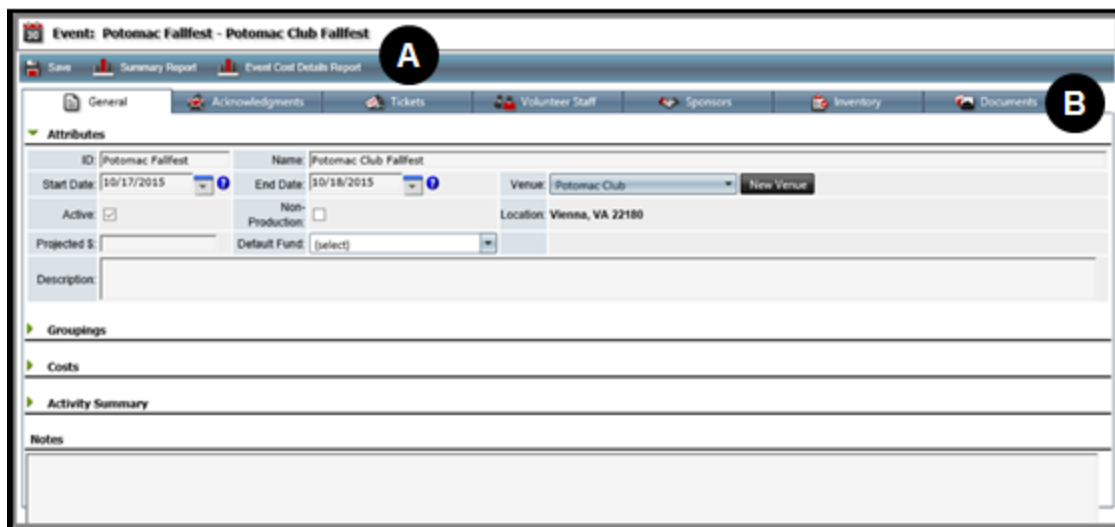
When multiple records are found, you can sort the results by clicking on the column headings or click the link in the **Event ID** column to open the event record.



Event ID	Event Name	Created	Active
16GALAJM	2016 Gala Dinner	2016-04-20	<input checked="" type="checkbox"/>
2016GALA	2016 Annual Gala	2016-04-13	<input checked="" type="checkbox"/>
2016 Ride	2016 Bicycle Ride	2016-03-21	<input checked="" type="checkbox"/>
FY16 Annual Dinner	2016 Annual Dinner	2016-02-20	<input checked="" type="checkbox"/>
TestEvent	Karens Test Event	2015-11-16	<input checked="" type="checkbox"/>
EV1	Event	2015-04-20	<input checked="" type="checkbox"/>
12-FOFB	2012 FOFB Event	2013-07-31	<input checked="" type="checkbox"/>

## Navigate an Event Record

The event record allows you to view specific information about the event.



- A. From the Menu bar, you can save any changes you make to the event record and generate a Summary Report or Event Cost Details Report.
- B. The tabs on the event record provide general information about the event as well as any acknowledgements, tickets, volunteer staff, sponsors, inventory, or documents added to the event.

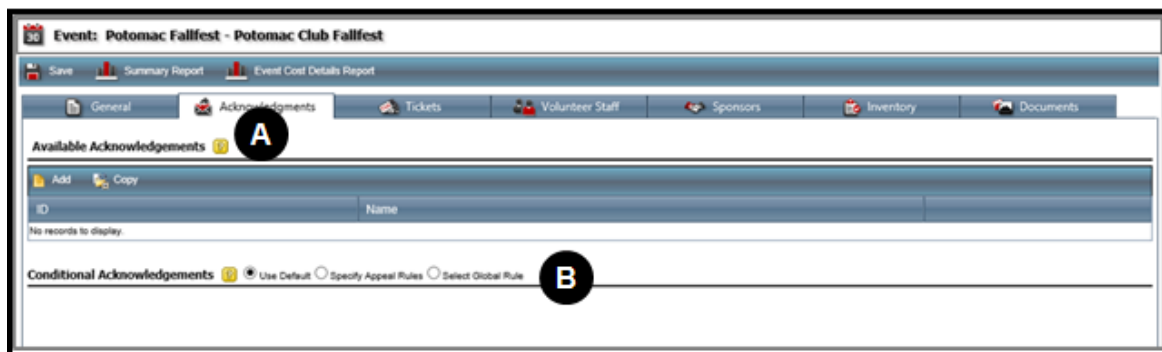
## The General Tab

On the General tab you can view the attributes, groupings, costs, activity summary, and notes for the event. The table below identifies each pane with a description of the information you can view on the event record.

Information Pane	Description
Attributes	View the event ID, name, start and end dates, venue, projected income, description, and default fund associated with the event.
Groupings	View the groupings available for categorizing the event.
Costs	View details including the supplier, estimated versus actual costs, and any notes associated with the cost.
Activity Summary	View a dashboard of the performance statistics including tickets sold, ticket revenue, and total cost.
Notes	View any notes that have been added for the event.

## The Acknowledgements Tab

On the Acknowledgements tab, you can view the available and conditional acknowledgements for the event.



- A. View the **ID** and **Name** of the acknowledgements added for the event.
- B. Determine the rules applied for any conditional acknowledgements. Only users with appropriate rights and permissions will be able to set rules for these acknowledgements.

## The Tickets Tab

On the Tickets tab, you can view the activities, tickets, statistics, and actions associated with the event.

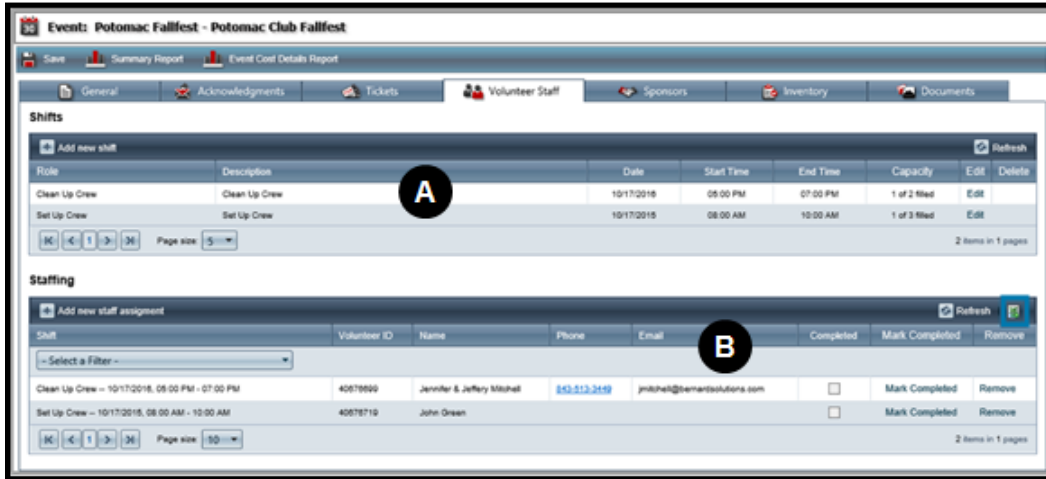
The screenshot shows the 'Event: Potomac Fallfest - Potomac Club Fallfest' page. The 'Tickets' tab is selected. The interface includes a navigation bar with tabs: General, Acknowledgments, Tickets, Volunteer Staff, Sponsors, Inventory, and Documents. The main content area is divided into four sections:

- Event Activities (A):** A table with columns: SKU, Description, Capacity, Available, Sold, Attended, Price. It lists two activities: Potomac Apple Barrel and Potomac Fallfest.
- Tickets (B):** A table with columns: SKU, Description, Max, Available, Sold, For Sale, Price. It lists two ticket types: Potomac Apples and Potomac Fallfest Ticket.
- Statistics (C):** A summary box showing: Tickets Sold: 6, Max Capacity: 70, Attendance: 0, Ticket Revenue: \$0.00.
- Actions (D):** A list of actions: Copy Tickets From Another Event, Import Event Attendance File, Export Event Attendance File, Use Ticket Wizard for a Quick Add.

- A. View the activities added to the event along with their SKU, Description, Capacity, and Price. You can also see the number of spots Available, Sold, and Attended for the activity.
- B. View the tickets added to the event along with their SKU, Description, and Price. You can also see the number of tickets Available and Sold.
- C. View the event statistics including number of tickets sold and total revenue from the event.
- D. Click a link to complete that action. This is only available to users who have the rights and permissions to complete these tasks.

## The Volunteer Staff Tab

On the Volunteer Staff tab, you can view the shifts and volunteers assigned to those shifts.



- A. View the volunteer shifts added for the event along with the Role, Description, and Date as well as the start and end times for each shift.
- B. View the volunteer information assigned to a shift including their Volunteer ID, Name, and contact information. You can view whether the shift was completed and download the details to an Excel spreadsheet.

## The Sponsors Tab

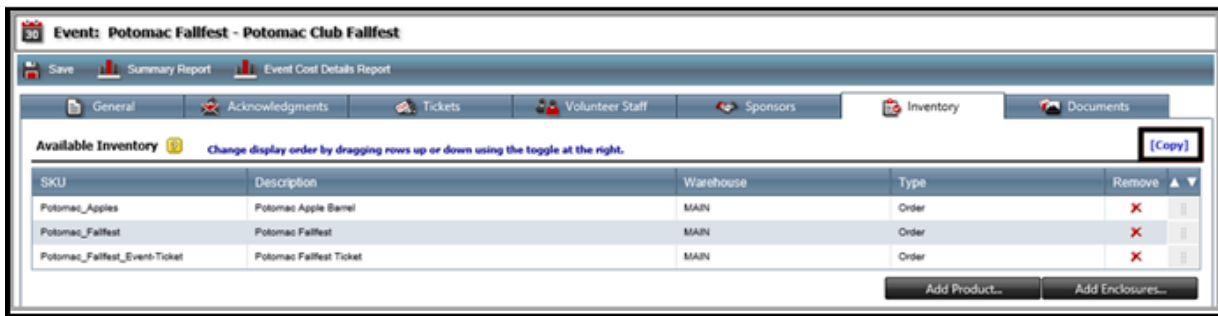
On the Sponsors tab, you can view the sponsorship levels and sponsors for the event.



- A. View details of the sponsorship levels such as Description, Color, and Capacity. Additional information includes the Benefits and Sponsors for each level. Click the Export to Excel button to download a copy of the details for all sponsorship levels.
- B. View the sponsors for the event. If an image is available on the sponsor record, it displays with a border based on the color associated with the sponsorship level.

## The Inventory Tab

On the Inventory tab, you can view the items available along with their SKU, Description, and Type as well as the Warehouse where they are stored.

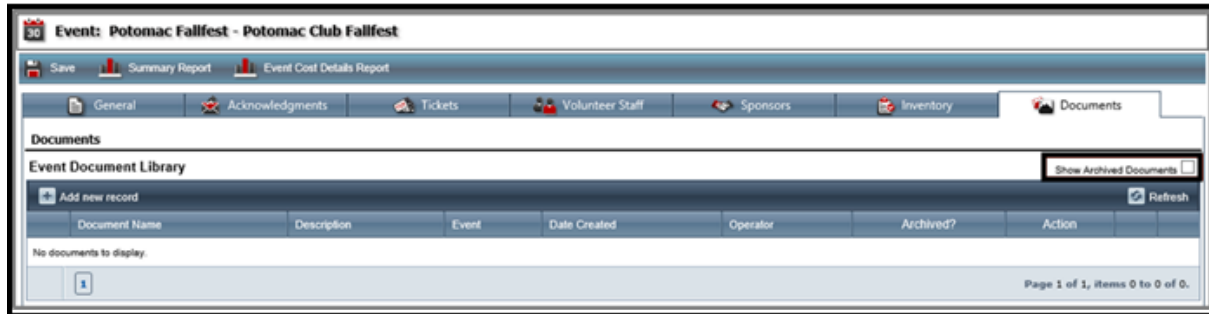


SKU	Description	Warehouse	Type	Remove
Potomac_Apples	Potomac Apple Barrel	MAIN	Order	X
Potomac_Fallfest	Potomac Fallfest	MAIN	Order	X
Potomac_Fallfest_EventTicket	Potomac Fallfest Ticket	MAIN	Order	X

Click the **Copy** link to copy the available inventory to another event.

## The Documents Tab

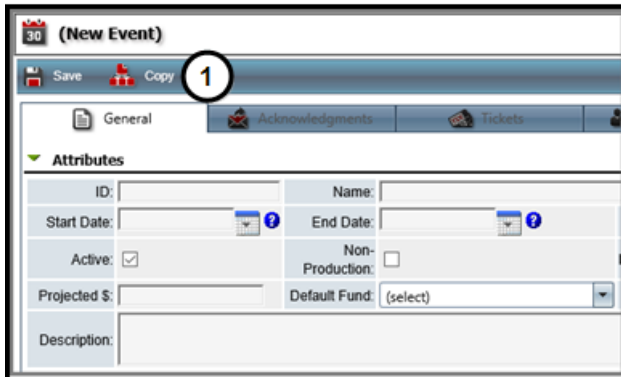
On the Documents tab, you can view any attachments that have been added for the event. Documents can be uploaded to **Aegis CRM** in a text, graphic, audio, and video format. Allowed formats include doc, .docx, .pdf, .gif, .jpg, .png, .rtf, .xls, .xlsx, .msg, .wav, .mp3, .wma.



For any documents that have been added you can view the Document Name, Description, Date Created, and Operator who added the document. To display any archived documents on this page, mark the **Show Archived Documents** checkbox.

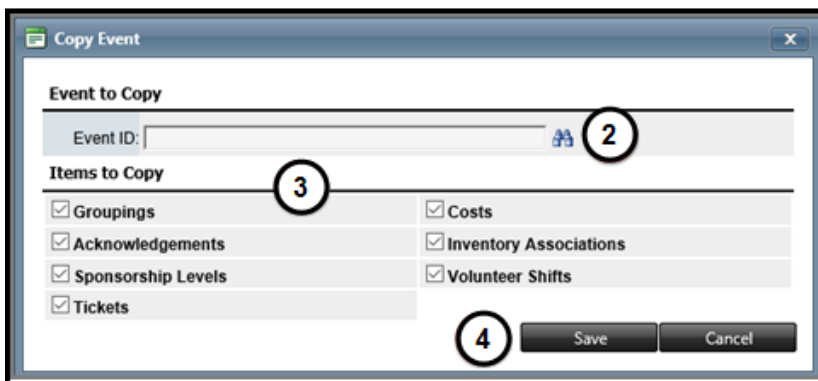
## Copy Event Details

For consistency and efficiency, **Aegis CRM** allows you to copy details from one event record to a new event record. To copy details from a previous event, click **New Event** on the Navigation menu and then follow these steps:



The screenshot shows the 'New Event' form with a top navigation bar containing 'Save' and 'Copy' buttons. The 'Copy' button is circled with the number 1. Below the navigation bar are tabs for 'General', 'Acknowledgments', and 'Tickets'. The 'Attributes' section includes fields for ID, Name, Start Date, End Date, Active (checked), Non-Production (unchecked), Projected \$, Default Fund (select), and Description.

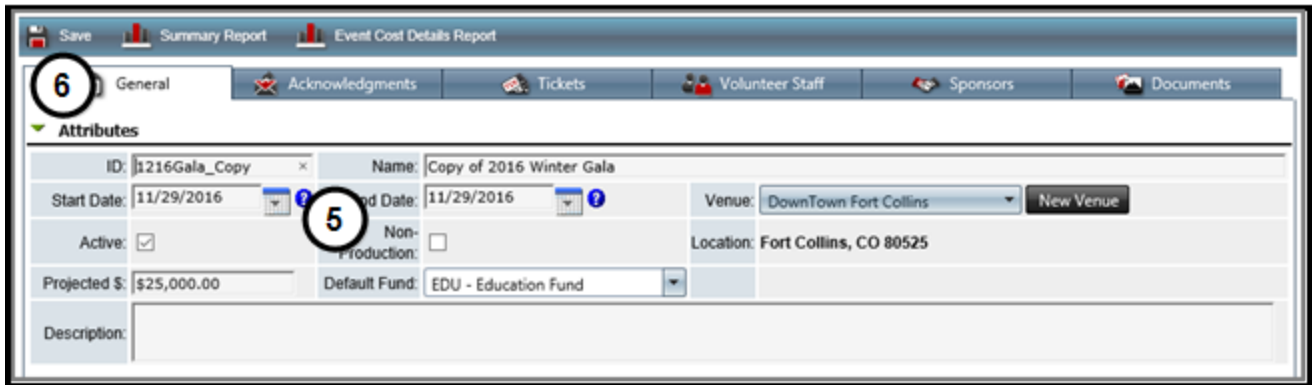
1. Click **Copy**.



The screenshot shows the 'Copy Event' dialog box. It has a title bar 'Copy Event' and a close button. The 'Event to Copy' section has an 'Event ID' field with a search icon, circled with 2. The 'Items to Copy' section has several checkboxes: Groupings, Acknowledgements, Sponsorship Levels, Tickets, Costs, Inventory Associations, and Volunteer Shifts, all of which are checked. This section is circled with 3. At the bottom right, there are 'Save' and 'Cancel' buttons, with the 'Save' button circled with 4.

2. Enter the **Event ID** for the event you want to copy. If you do not know the ID, click the **Search** icon to locate the event record.
3. Mark the checkboxes for the information you want to copy.
4. Click **Save**.





5. Modify the **Attributes** for the copied event to update the **ID, Name, Start Date, and End Date**.
  - a. Make any additional changes as needed to the **Projected \$, Default Fund, and Venue**.
6. Click **Save**.

## Add Costs

You add expenses such as rent for a venue on the General tab of the event record. Click **Add New Cost** and then follow these steps:



1. Select the **Supplier** for the expense from the list of available vendors.
  - a. If the vendor does not display in the list, click **New Vendor**.

2. Enter the **Total Quantity** for the cost as well as the estimated cost amount.
3. Enter any notes about the cost.
4. Click **Save**.

## Add an Event Activity

For events where you will have multiple ticket options available to those who register, you can add more activities to the record.

Example: For hosting a conference event, you might create one activity for just the conference and another for the conference with lodging.

To add a new activity to an event record, locate and open the event record, click **Add Event Activity**, and then follow these steps:



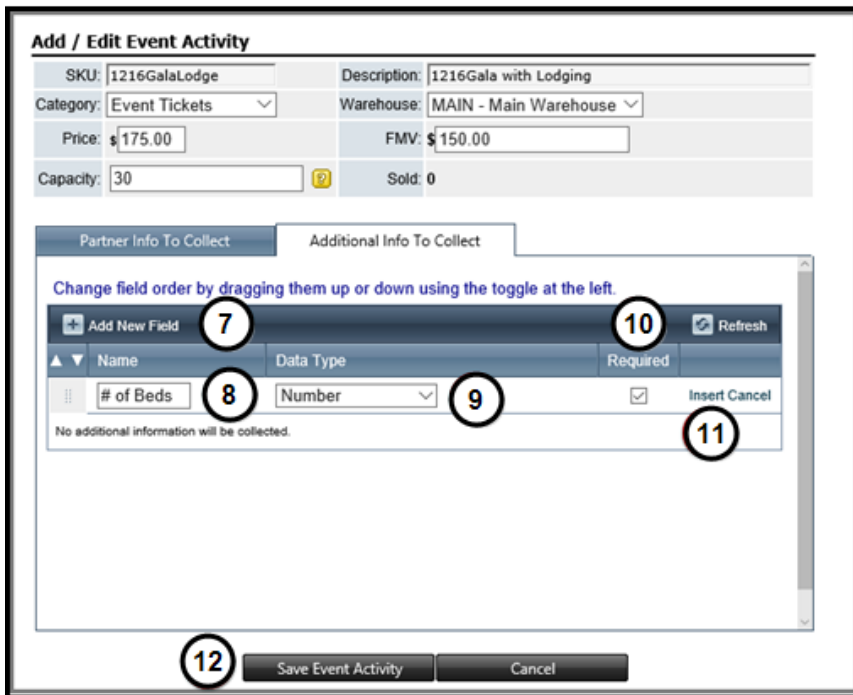
The screenshot shows the 'Add / Edit Event Activity' form. At the top, there are input fields for SKU (1216GalaLodge), Description (1216Gala with Lodging), Category (Event Tickets), Warehouse (MAIN - Main Warehouse), Price (\$175.00), FMV (\$150.00), Capacity (30), and Sold (0). Below this is a section for 'Partner Info To Collect' and 'Additional Info To Collect'. The 'Additional Info To Collect' section is active and shows a list of 'Available Fields' (City, State or Prov, Postal Code, Home Phone, Business Phone, Mobile Phone, No Direct Mail, No Phone Solicitation, No Email Solicitation) and a 'Selected Fields' list (Mark all as Required, First Name, Last Name, Email). The 'Save Event Activity' and 'Cancel' buttons are at the bottom.

1. Update the **SKU**, select the **Category**, enter the **Price**, and enter the **Capacity** for the activity.

2. Modify the **Description**, select the **Warehouse**, and enter the **FMV** (Full Market Value).
3. Select a field from the **Available Fields** pane.
4. Click the right arrow to add the field to the **Selected Fields** pane.
  - a. Repeat steps 3 and 4 to add more fields.
5. Mark the checkboxes to require this information be collected while registering someone for the activity.

Tip: Mark the **Mark all as Required** checkbox to collect all of the information for the fields in the Selected Fields pane.

6. Click the **Additional Info to Collect** tab.



The screenshot shows the 'Add / Edit Event Activity' form. At the top, there are input fields for SKU (1216GalaLodge), Description (1216Gala with Lodging), Category (Event Tickets), Warehouse (MAIN - Main Warehouse), Price (\$175.00), FMV (\$150.00), Capacity (30), and Sold (0). Below this is a section for 'Partner Info To Collect' and 'Additional Info To Collect'. The 'Additional Info To Collect' tab is active, showing a table with columns for Name, Data Type, and Required. A field named '# of Beds' is added with a 'Number' data type and a checked 'Required' checkbox. The table also includes an 'Add New Field' button (7), a 'Refresh' button (10), and an 'Insert Cancel' button (11). At the bottom of the form, there are 'Save Event Activity' (12) and 'Cancel' buttons.

7. Click **Add New Field**.
8. Enter a **Name** for the field.

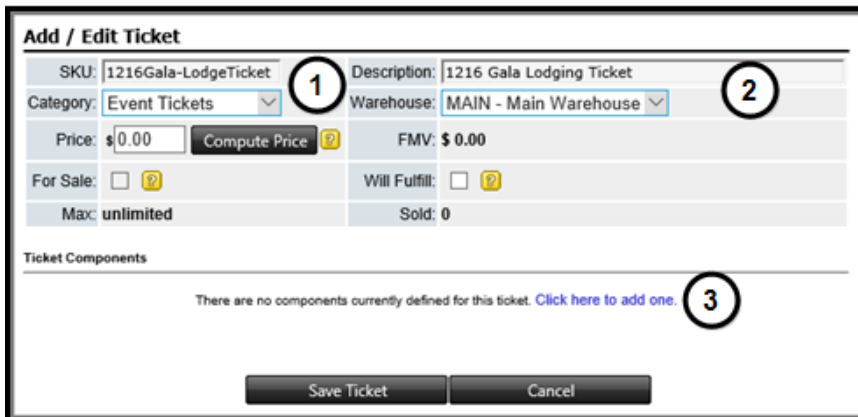
Example: Because we are offering discounted lodging for the Gala, collecting the number of beds can determine whether attendees prefer a room with one king bed or two double beds.

9. Select **Number** from the list.
10. Mark the **Required** checkbox.
11. Click **Insert**.
12. Click Save **Event Activity**.

## Add Event Tickets

For each activity that you add to your event, you must add a ticket before it becomes an option available to those who register.

To add a new ticket to an event, locate and open the event record, select the **Tickets** tab, click **Add Ticket**, and then follow these steps:



**Add / Edit Ticket**

SKU: 1216Gala-LodgeTicket	Description: 1216 Gala Lodging Ticket
Category: Event Tickets	Warehouse: MAIN - Main Warehouse
Price: \$0.00	FMV: \$0.00
For Sale: <input type="checkbox"/>	Will Fulfill: <input type="checkbox"/>
Max: unlimited	Sold: 0

Ticket Components

There are no components currently defined for this ticket. [Click here to add one.](#)

Save Ticket    Cancel

1. Update the **SKU** and select the **Category** for the ticket.
2. Update the **Description** and select the **Warehouse**.
3. Select **Click here to add one** to add the ticket activity.

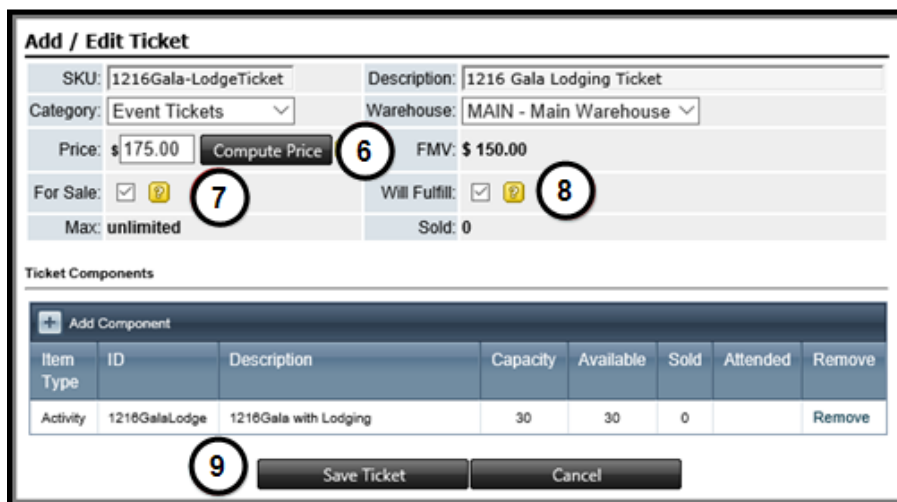


**Event Activities**

	ID	Description	Cap	Avail	Sold	Price
<input type="checkbox"/>	1216Gala	1216Gala	100	100	0	\$100.00
<input checked="" type="checkbox"/>	1216GalaLodge	1216Gala with Lodging	30	30	0	\$175.00

4

4. Mark the checkbox for the activity to add for the ticket.
5. Click **Save**.



**Add / Edit Ticket**

SKU: 1216Gala-LodgeTicket Description: 1216 Gala Lodging Ticket  
 Category: Event Tickets Warehouse: MAIN - Main Warehouse  
 Price: \$175.00  FMV: \$150.00  
 For Sale:  Will Fulfill:   
 Max: unlimited Sold: 0

**Ticket Components**

Item Type	ID	Description	Capacity	Available	Sold	Attended	Remove
Activity	1216GalaLodge	1216Gala with Lodging	30	30	0		Remove

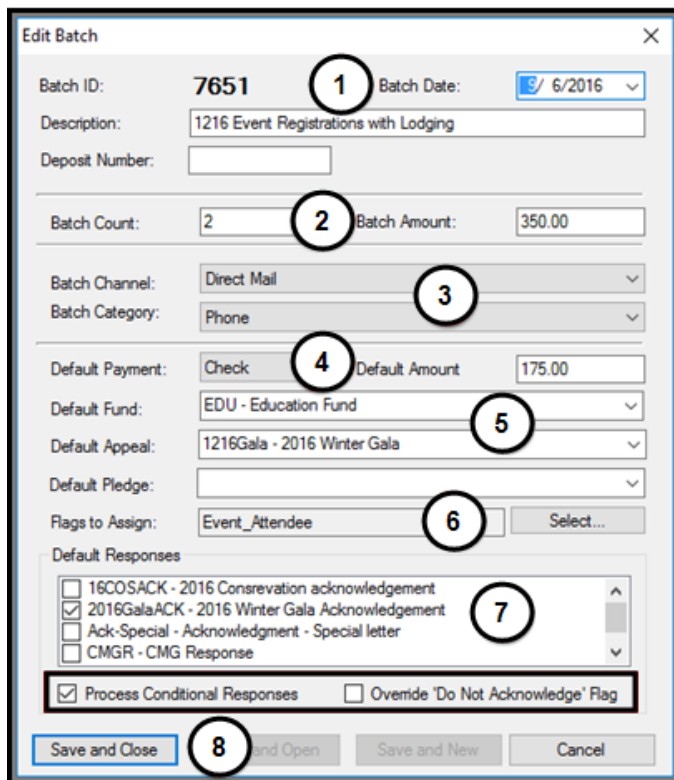
6. Click **Compute Price** to automatically update the **Price** and **FMV** (Fair Market Value) fields from the activity listed in **Ticket Components**.
7. Mark the **For Sale** checkbox.
8. Mark the **Will Fulfill** checkbox.
9. Click **Save Ticket**.

## Register Event Attendees

All information collected when registering participants for an event is entered in to **Aegis CRM** using **Rapid Entry**. See **Entering Records in Rapid Entry** for more information about the batch process.

### Create a Batch

To register event participants, log in to **Rapid Entry**, click the **New Batch** icon, and then follow these steps:

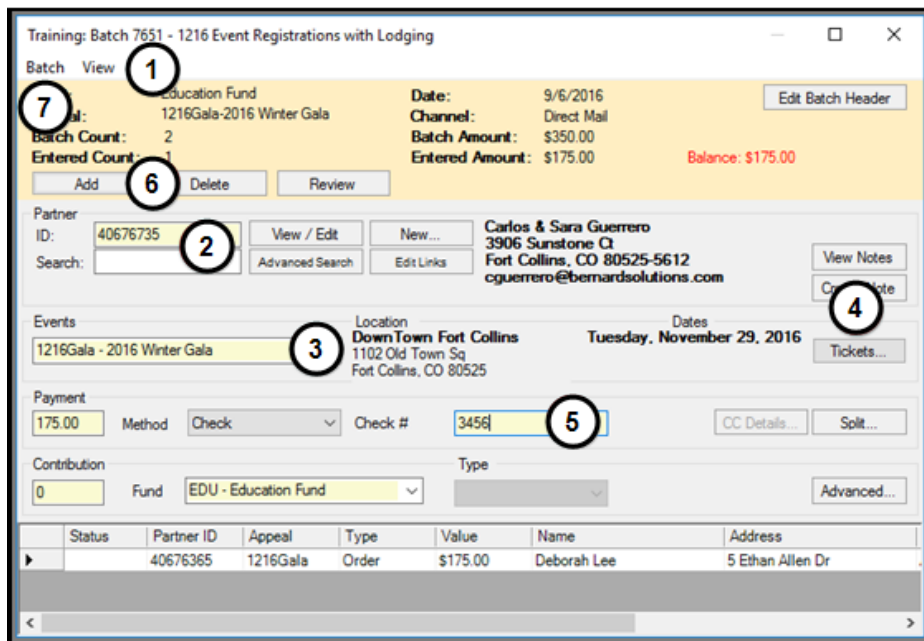


1. Enter the current date and a description for the batch.
2. Enter the number of unique items to be added and the total amount of payments received for the registration.
3. Select the **Batch Channel** and **Batch Category**.
4. Select the **Default Payment** and enter the **Default Amount** for each payment.

5. Select the **Default Fund** and **Default Appeal**.
6. Click **Select**, mark the checkbox for **Event\_Attendee**, and then click **Save**.
7. Mark the checkbox for the default acknowledgement to be sent to those who register for the event.
  - a. Mark the **Process Conditional Responses** checkbox to apply the response rules on the event record.
  - b. Mark the **Override 'Do Not Acknowledge' Flag** checkbox to send the acknowledgement even if this flag is set on the partner record.
8. Click **Save and Close**.

### Enter Data in the Batch

After you create the batch, you can add the registrations for your event. To add event registrations, open the Batch and then follow these steps:



Training: Batch 7651 - 1216 Event Registrations with Lodging

Batch View **1**

Education Fund Date: 9/6/2016 Edit Batch Header

1216Gala-2016 Winter Gala Channel: Direct Mail

Batch Count: 2 Batch Amount: \$350.00

Entered Count: 1 Entered Amount: \$175.00 Balance: \$175.00

Add **6** Delete Review

Partner ID: 40676735 **2** View / Edit New... Carlos & Sara Guerrero  
3906 Sunstone Ct  
Fort Collins, CO 80525-5612  
cguerrero@bernardsolutions.com View Notes

Search: Advanced Search Edit Links Create

Events Location Dates **4**

1216Gala - 2016 Winter Gala **3** DownTown Fort Collins Tuesday, November 29, 2016 Tickets...

1102 Old Town Sq  
Fort Collins, CO 80525

Payment

175.00 Method: Check Check # **5** 3456 CC Details... Split...

Contribution Type

0 Fund: EDU - Education Fund Advanced...

Status	Partner ID	Appeal	Type	Value	Name	Address
▶	40676365	1216Gala	Order	\$175.00	Deborah Lee	5 Ethan Allen Dr

1. Click **View** and then select **Show Event Panel**.
2. Enter the **Partner ID** or search for and select the partner who is registering for the event.

3. Select the event.
4. Click **Tickets**, enter the number of tickets to purchase, and then click **OK**.
5. Enter the payment information.
6. Click **Add**.
  - a. Repeat steps 2 through 5 to add more event registrations.
7. Click **Batch** and then select **Save & Close**.

## Export the Staff Assignments List

To export the staff assignment list, locate and open the event record in **Aegis CRM**, select the **Volunteer Staff** tab and then follow these steps:



1. Click the export icon.
2. Click **Open** to open the file in Microsoft Excel.

## Export the Attendee List

To export a list of those who have registered for your event, open the event record in **Aegis CRM**, select the **Tickets** tab and then follow these steps:

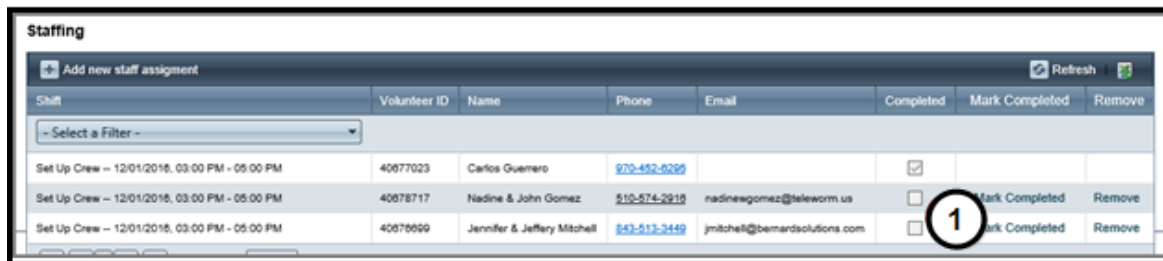




1. Click the **Export Event Attendance File** icon.
2. Click **Open** to open the file in Microsoft Excel.

## Complete Staff Assignments

After your event, you can mark the staff assignments as completed for the volunteers who worked the event. To complete staff assignments, open the event record in **Aegis CRM**, select the **Volunteer** staff tab and then follow these steps:



1. Click **Mark Completed** for the completed assignment.
  - a. Repeat the above step for each volunteer who worked the event.

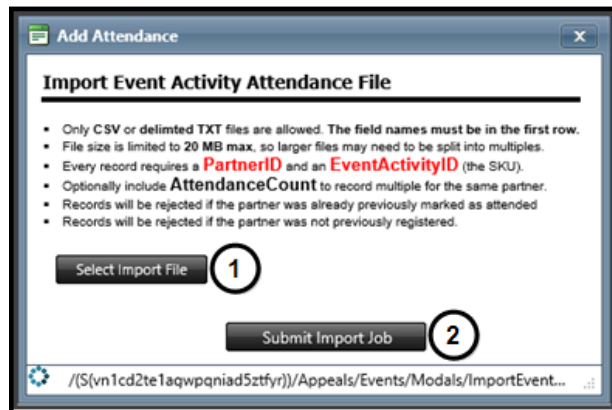
## Import the Attendance File

After your event is over, you should import the attendance file to update the partner records to show they attended the event. Before you import the file, make sure it is:

- Either a CSV or delimited TXT file.
- The field names are in the first row.

- Each record must have a Partner ID and SKU (Event Activity ID) for the event.

To import the attendance file, open the event record in Aegis CRM, select the **Tickets** tab, click **Import Event Attendance File**, and then follow these steps:



1. Click **Select Import File** to locate and upload the file.
2. Click **Submit Import Job**.

Any partner records that have been previously marked as attended and those not previously registered for the event will not be included in the import.

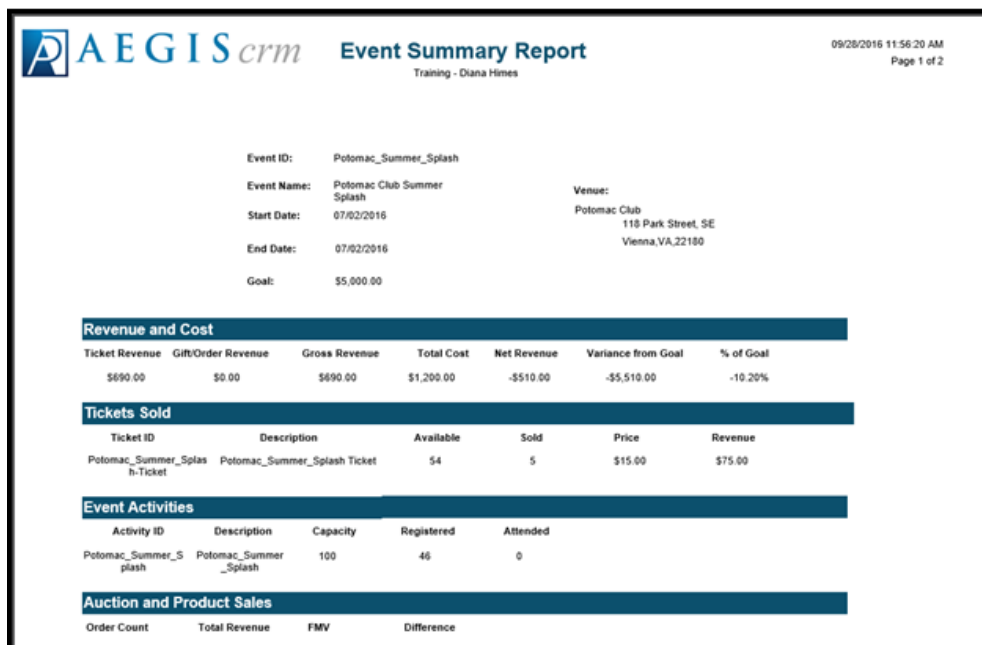
## Generate Event Reports

On an event record, you can generate a Summary Report and an Event Cost Details Report to manage and track the details of your event.

### Summary Report

The Summary Report includes information about revenue and costs, number of tickets sold, activities, inventory items, gift revenue, and sponsors for the event.

To generate the Summary Report, open the event record in **Aegis CRM** and then click **Summary Report**.



**AEGIS CRM Event Summary Report**  
Training - Diana Himes  
09/28/2016 11:56:20 AM  
Page 1 of 2

Event ID: Potomac\_Summer\_Splash  
Event Name: Potomac Club Summer Splash  
Start Date: 07/02/2016  
End Date: 07/02/2016  
Goal: \$5,000.00

Venue: Potomac Club  
118 Park Street, SE  
Vienna, VA, 22180

Revenue and Cost						
Ticket Revenue	Gift/Order Revenue	Gross Revenue	Total Cost	Net Revenue	Variance from Goal	% of Goal
\$690.00	\$0.00	\$690.00	\$1,200.00	-\$510.00	-\$5,510.00	-10.20%

Tickets Sold						
Ticket ID	Description	Available	Sold	Price	Revenue	
Potomac_Summer_Splash-Ticket	Potomac_Summer_Splash Ticket	54	5	\$15.00	\$75.00	

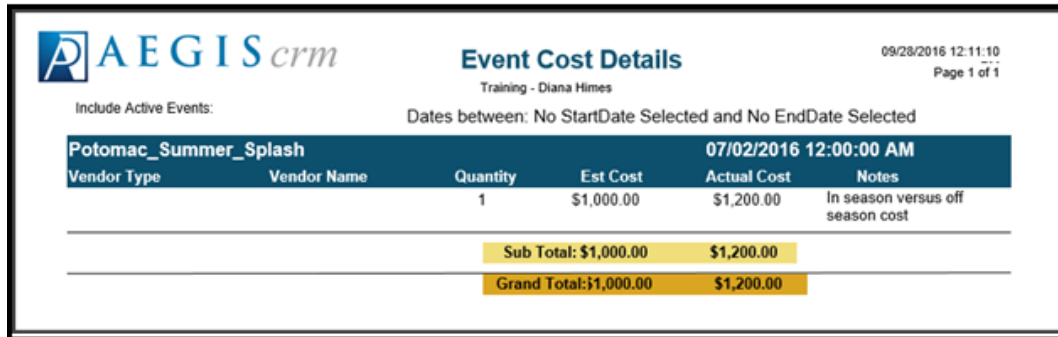
Event Activities				
Activity ID	Description	Capacity	Registered	Attended
Potomac_Summer_Splash	Potomac_Summer_Splash	100	46	0

Auction and Product Sales			
Order Count	Total Revenue	FMV	Difference

### Event Cost Details Report

The Event Cost Details Report includes information about all the expenses for the event. The details in the report include vendor name, quantity purchased, estimated and actual costs, as well as any notes about the cost.

To generate the Event Cost Details Report, open the event record in **Aegis CRM**, click **Event Cost Details Report** and then click **Open** when prompted after the file downloads.



The screenshot shows the 'Event Cost Details' report in AEGIS CRM. The report title is 'Event Cost Details' and it is for 'Training - Diana Himes'. The date and time are '09/28/2016 12:11:10' and 'Page 1 of 1'. The report includes a table with columns for Vendor Type, Vendor Name, Quantity, Est Cost, Actual Cost, and Notes. The data shows a single entry for 'Potomac\_Summer\_Splash' with a quantity of 1, an estimated cost of \$1,000.00, and an actual cost of \$1,200.00. The notes indicate it is 'In season versus off season cost'. The report also includes a Sub Total and Grand Total, both showing \$1,200.00.

Vendor Type	Vendor Name	Quantity	Est Cost	Actual Cost	Notes
	Potomac_Summer_Splash	1	\$1,000.00	\$1,200.00	In season versus off season cost
<b>Sub Total:</b>			<b>\$1,000.00</b>	<b>\$1,200.00</b>	
<b>Grand Total:</b>			<b>\$1,000.00</b>	<b>\$1,200.00</b>	



**AEGIS**  
PREMIER SOLUTIONS