



EVENTS

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Objectives

The purpose of this manual is to instruct users on understanding:

- **How Events are set up**
- **How to set up Event Activities**
- **How to Add Event Tickets**
- **How to capture Attendee Information**
- **How to register Donors for Events in Rapid Entry**
- **How to report on Events**

Events Overview

The event record contains information for users to track registrants, attendees, and sponsors related to a particular event. In addition to tracking these details, users can also manage the acknowledgements, tickets, and documents created for the event. Volunteers can also be assigned to work particular shifts and fill available slots.

Event Tabs

This section will focus on creating a new Event record from the **Events module>New Event sub-module**.

By default, when a user creates a new Event record, they receive Eight tabs, with multiple sections, to complete/evaluate:

General – Basic Identification info: Event ID, Name, Status, etc.

Acknowledgements – Where specific Ack letters are linked to the Event. Usually, these ACKS take the form of Registration acknowledgements with directions/info about the event. Enables the copying and use of pre-existing templates or building of unique, one-off Acks.

Tickets – Where tickets and additional information collection is created. Users can utilize an Activity and Ticket creation wizard to add multiple tickets and the collection of data.

Volunteer Staff – Tracking section for volunteer staff. Assignments & time frames can be created, assigned to users, and tracked by adding them to this section.

Sponsors – Enables tracking of Sponsor levels tied to distinct Individual Sponsors.

Inventory – Inventory items shown to a Rapid Entry operator whenever placing an order motivated by this Appeal. Operator may select any number of the associated items. Users can rearrange the order by dragging & dropping.

Documents – Storage location for any accompanying documents: vendor contracts, donor lists, letters, etc.

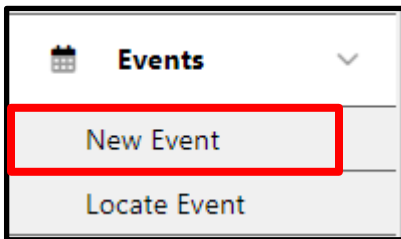
Permissions – Enables users to set security by Roles on which users can view or not view the Event in Rapid Entry.

New Events

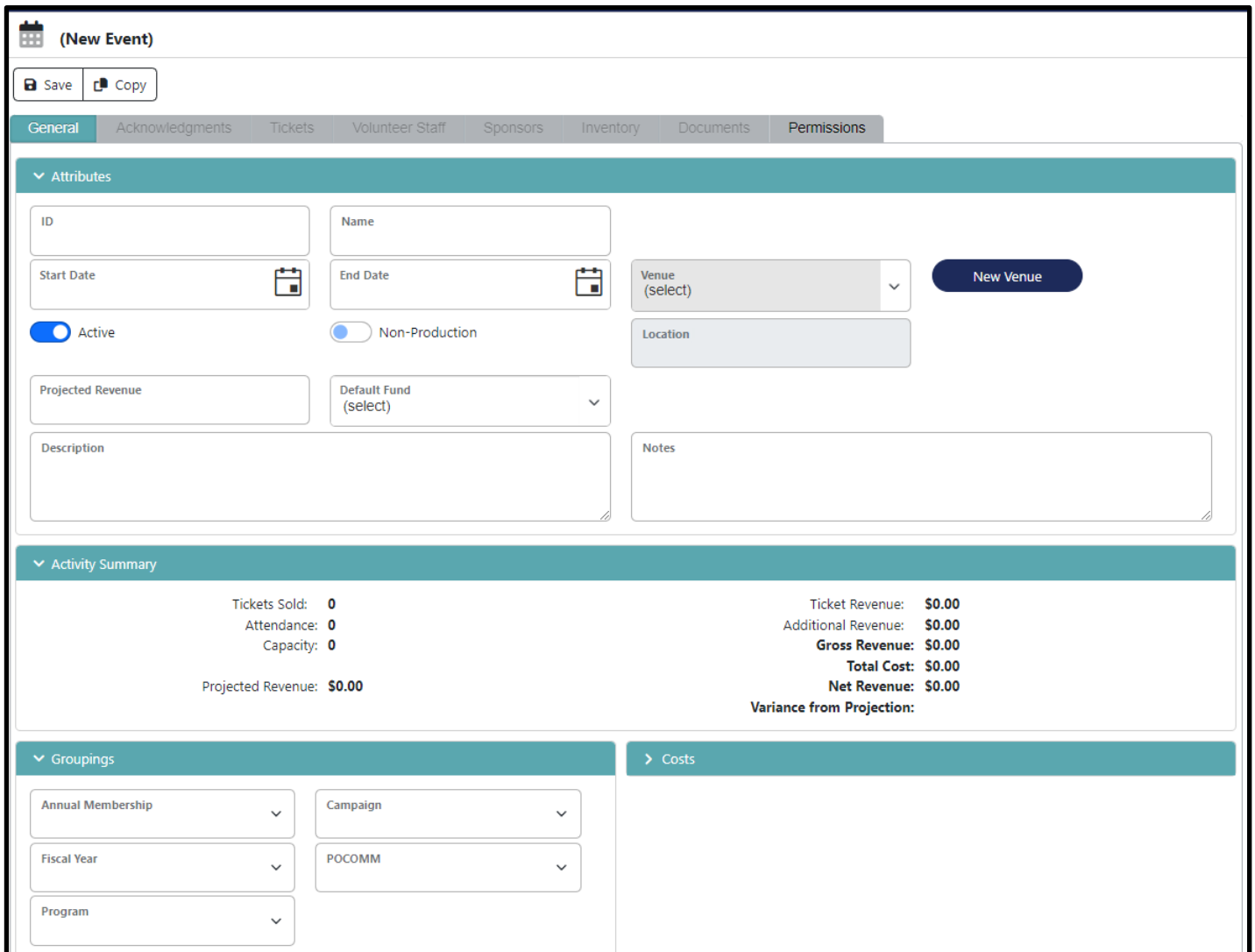
Creating New Event STEPS

Generating an Event Record

1. Click on the **Events Module**>**New Event** sub-module.



2. The **New Event** record displays.

A screenshot of the "New Event" record form in a software application. The form is titled "(New Event)" and has a "Save" button and a "Copy" button. Below the buttons are several tabs: "General", "Acknowledgments", "Tickets", "Volunteer Staff", "Sponsors", "Inventory", "Documents", and "Permissions". The "General" tab is selected. The form is divided into several sections: "Attributes" (with fields for ID, Name, Start Date, End Date, Venue (select), Location, Projected Revenue, Default Fund (select), and Description), "Activity Summary" (with fields for Tickets Sold, Attendance, Capacity, Projected Revenue, Ticket Revenue, Additional Revenue, Gross Revenue, Total Cost, Net Revenue, and Variance from Projection), "Groupings" (with fields for Annual Membership, Campaign, Fiscal Year, POCOMM, and Program), and "Costs" (with a right-pointing arrow). The "Active" and "Non-Production" checkboxes are checked. The "Venue (select)" field has a "New Venue" button next to it. The "Activity Summary" section shows all values as 0 or \$0.00.

GENERAL TAB

The General Tab is the first event section displayed to a user when creating a new event. It must be completed before the other tabs of the event become available.

The General Tab contains the Event's basic descriptive information under the top **Attributes** section, it's performance under the **Activity Summary**, any desired, additional labeling for reports under the **Groupings** section, and any expenses that need to be associated with the event under the **Cost** section.

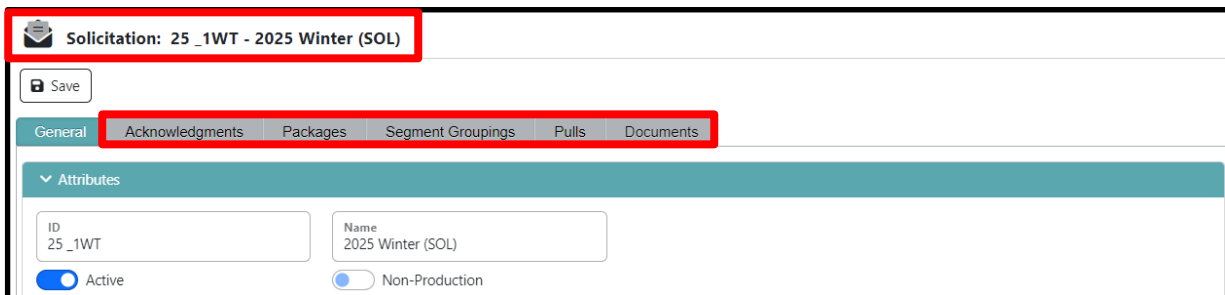
Attributes

The **Attributes** section contains the initial and required fields for the event to be saved, defined, and further built out. All other tabs will be grayed out until this tab is completed and saved.

The screenshot shows the 'New Event' form with the 'Attributes' section expanded. The form includes a header with a calendar icon and the text '(New Event)'. Below the header are 'Save' and 'Copy' buttons. A navigation bar contains tabs for 'General', 'Acknowledgments', 'Tickets', 'Volunteer Staff', 'Sponsors', 'Inventory', 'Documents', and 'Permissions'. The 'Attributes' section is highlighted in teal and contains the following fields: 'ID', 'Name', 'Start Date' (with a calendar icon), 'End Date' (with a calendar icon), 'Venue (select)' (with a dropdown arrow and a 'New Venue' button), 'Location', 'Active' (checked), 'Non-Production' (unchecked), 'Projected Revenue', 'Default Fund (select)' (with a dropdown arrow), 'Description', and 'Notes'.

1. In the **ID** field, enter the desired ID.
 - Recommended that users use a combination of date and distinct name in the ID field with a longer, more descriptive value in the **Name** field.
2. In the **Name** field, enter the desired Name.
3. In the **Start Date** field, enter the desired start date for the event.
4. In the **End Date** field, enter the desired end date for the event.

5. From the **Venue** dropdown, select the desired venue for the event. Once selected, the Location will display in that field below.
6. Leave the **Active** toggle selected.
 - Users might toggle this off to plan this event as an upcoming occurrence and then activate it during the date range of that appeal.
 - If Toggled off, the event is NOT selectable from Rapid Entry and would prevent tickets from mistakenly taken.
7. Leave the **Non-Production** toggle unselected.
 - User would un-toggle if interested in just creating a test appeal.
 - Unselected will also prevent the Event from displaying in Reports.
8. In the **Projected Revenue**, users can choose to enter an estimate of what the total revenue will be for sales for comparison to actual amount after the event.
9. In the **Default Fund** field, users select from the dropdown list.
 - Users should receive direction from the **Finance/Accounting** department as to which fund to select.
10. In the **Description** field, enter a short summary of the Event.
 - Be as specific as possible, this field will inform future users as to the target of this solicitation and whether it is viable for their use.
11. Leave the **Notes** field blank.
 - Notes are added to define something unique about the appeal that a user should know. Limited to specific audience, one-time use, etc.
12. Click **Save** to save required **ID & Name** fields as well as other completed fields.



Screenshot of a web form for a solicitation record. The record title "Solicitation: 25_1WT - 2025 Winter (SOL)" is highlighted with a red box. Below it is a "Save" button. A tabbed interface shows "General" selected, with other tabs for "Acknowledgments", "Packages", "Segment Groupings", "Pulls", and "Documents". Under the "Attributes" section, the "ID" field contains "25_1WT" and the "Name" field contains "2025 Winter (SOL)". At the bottom, there are two toggle switches: "Active" (which is turned on) and "Non-Production" (which is turned off).

13. Observe the results of the save:
 - Remaining **Tabs** become active.
 - Appeal's **ID** and **Name** are stamped on the Record header.

Activity Summary

The **General – Activity Summary** section generates summarized, non-editable information capturing the current status of ticket sales and revenue for the Event.

Activity Summary	
Tickets Sold: 0	Ticket Revenue: \$0.00
Attendance: 0	Additional Revenue: \$0.00
Capacity: 0	Gross Revenue: \$0.00
	Total Cost: \$0.00
	Net Revenue: \$0.00
Projected Revenue: \$0.00	Variance from Projection:

Groupings

The **General – Groupings** section is an optional section that enables users to leverage Administrator created Groupings **Categories** and Grouping **Values** to further label an Event for more refined reporting.

Groupings	
Fiscal Year <input type="text"/>	Campaign <input type="text"/>
Program <input type="text"/>	Annual Membership <input type="text"/>

Costs

General – Costs section is where users can track extraneous costs for the creation, marketing, and delivery of specific items related to the Event. Users could track items such as the cost to rent the venue or pay a keynote speaker.

These costs are factored into the overall cost and reflect in the Activity Summary.

Costs					
+ Add Import Appeal Level Costs					
	Supplier ▲	Estimated Cost	Actual Cost	Total Quantity	Notes
	ACME Services	\$10,000.0000	\$9,200.0000	1	

Page size: 50 1 items in 1 pages

1. Click on the **+ Add** button.

Supplier: ACME Services (dropdown) **New Vendor**

Address: Westminster, CO 80234

Total Quantity: 0

Estimated Cost: \$10,000.0000

Actual Cost: \$9,200.0000

Notes: [text area]

Save **Cancel**

2. Select the desired **Supplier** from the dropdown menu.

- New Vendors can be added via the New Vendor button and will be stored under the Vendors module.

3. **Address** will populate from Vendor record.

4. Enter the **Total Quantity**, **Estimated Cost**, and **Actual Cost** (when determined), and any desired **Notes**.
5. Click **Save**.

Costs can also be imported into the system via the **Import Appeal Level Costs** link and by following the directions listed.

Import Appeal Level Costs

Upload Appeal Level Costs

Uploading costs here will apply cost entries to an appeal itself, which do not belong to any particular appeal pull.

Select File [Upload](#)

Submit Cancel

Input File Must Contain

- **Cost**
 - Total amount of costs to be applied to the appeal.
- **Vendor**
 - If Vendor Does not exist, we will create the Vendor.

Optional columns

- **Quantity**
 - If this is not supplied, a quantity of 1 will be applied.
- **Note**
 - Will be added to the cost records

All other columns in the file will be ignored

ACKNOWLEDGEMENTS TAB

The **Acknowledgements** tab enables users to link specific follow up **Acknowledgement** appeal (letters) for the current **Event** record. Only the **Specify Appeal Rules** option under the **Conditional Acknowledgements** section makes sense for use of an Acknowledgement letter as a Registration confirmation communication.

The **Specify Appeal Rules** option creates unique **Conditions** and **Rules** and ties them to an existing **Acknowledgement Appeal** record. It is used specifically for Events whose Condition & Rules are NOT usually replicable.

Users will need to create a specific Acknowledgement Appeal for each Event that contains the confirmation information they desire a registrant to receive for the event BEFORE creating the Event. Steps

SPECIFY APPEAL RULES RADIO BUTTON

1. Click the **Specify Appeal Rules** radio button.
2. Click the **+Add Conditional button**.

3. In the **Acknowledgement Appeal** lookup field enter the name of the desired **Acknowledgement Appeal** record.

- Alternately, click the **Lookup icon** and select the desired **Acknowledgement Appeal** from dropdown by clicking the **checkbox** from under the **Select** column.
 - User can also scroll pages or filter results by **Appeal ID** or **Appeal Name**.

Select Acknowledgements

Select the appeal acknowledgements you wish to use. Include Inactive Appeals

Select	Appeal ID	Appeal Name
<input checked="" type="checkbox"/>	ALL	All Donors Generic Letter (ACK)
<input checked="" type="checkbox"/>	BSDN	Donation of \$250 or Less (ACK)
<input checked="" type="checkbox"/>	BSPL	Pledge of \$250 or Less (ACK)
<input checked="" type="checkbox"/>	CHR1	Christmas Letter 1: \$99.99 or Less (ACK)
<input checked="" type="checkbox"/>	CHR2	Christmas Letter 2: \$100 or More (ACK)
<input checked="" type="checkbox"/>	CHR3	Christmas Letter 3: Gala Tix (ACK)
<input checked="" type="checkbox"/>	EAS1	Easter Letter 1: \$99.99 or Less (ACK)
<input checked="" type="checkbox"/>	EAS2	Easter Letter 2: \$100 or More (ACK)
<input checked="" type="checkbox"/>	MAJACT	Major Activity 5K or Plus
<input checked="" type="checkbox"/>	MDLR	Major Donor: Lifetime Donations of \$250 or More (ACK)

Page size: 10 16 items in 2 pages

- Once the desired **Acknowledgement Appeal** is selected, click the **Save** button.

Add / Edit Conditional Acknowledgement

Acknowledgement Appeal
BSDN - Donation of \$250 or Less (ACK)

Stop Processing ?

Rules ?

Save Save & Close Close

- Click on the **+Add new record** button that displays under the **Rules** section.

Add / Edit Conditional Acknowledgement

Acknowledgement Appeal
BSDN - Donation of \$250 or Less (ACK)

Stop Processing ?

Rules ?


+ Add new record

Rule Type	Description
-----------	-------------

7. Add a **Rule Type** of **Activity Amount Range**.
8. Add an **Amount** of **Is Less Than**.
9. Add a **Value** of **250**.

Rules ?

+ Add new record

	Rule Type	Description
	Rule Type Activity Amount Range	Amount Is Less than

No records to display.

Save Save & Close Close

10. Click the **Save ICON** to the left of the row.
 - There is no auto-save or reminder if NOT saved; users must remember to click here for initial save of row.
11. Click the **Save & Close** button on the bottom of record.
12. The Rule is added under the **Specify Appeal Rules** selection.

Conditional Acknowledgements ?

Rules to use
 Use Default Specify Appeal Rules Select Global Rule

+ Add Conditional

	Name	Name	Premiums	Rules
1	BSDN	Donation of \$250 or Less (ACK)		Stop Processing <input checked="" type="checkbox"/>

Stop Processing feature is sometimes UNCHECKED for both Available & Global Acks: this enables clients to send multiple acknowledgement responses to a gift type. For example, a client might send an Email response AND a Paper response.

TICKETS TAB

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.

Adding Tickets NOTES – READ FIRST

Whether creating the first ticket for a new Event or adding an additional ticket to an existing Event, users should **ALWAYS use the Quick Add Wizard**.

The **Quick Add Wizard** automatically displays when a user clicks on the Ticket tab for the **first time** on a newly added Event.

However, if users are creating a new ticket for an existing event, they can access the wizard from the **Actions Menu** (lower right) and clicking on the **Use Ticket Wizard for a Quick Add**.

It is extremely important that users **ALWAYS** use the wizard when adding tickets to an Event – New or Existing – as this sets up the ticket correctly for Aegis Inventory and processing.

Event: 24_NSR - 2024 November Silent Retreat

Save Reports

General Acknowledgments **Tickets** Volunteer Staff Sponsors Inventory Documents Permissions

Event Activities

+ Add Event Activity Refresh

	SKU	Description	Capacity	Available	Sold	Attended	Price
▼	24_NSR	24_November Silent Retreat	150	141	9	0	\$100.00

Statistics

Tickets Sold: 9
 Max Capacity: 150
 Attendance: 0
 Ticket Revenue: \$900.00

Tickets

+ Add Ticket Refresh

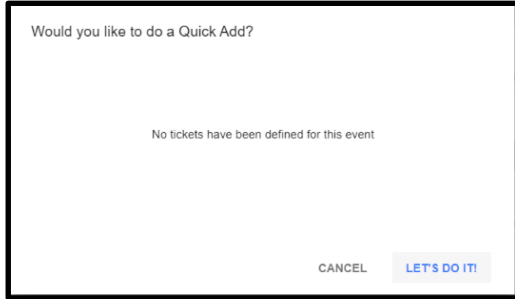
	SKU		Max	Available	Sold	For Sale	Price
▼	24_NSRT	24_November Silent Retreat Ticket	150	141	9	✓	\$100.00

Actions

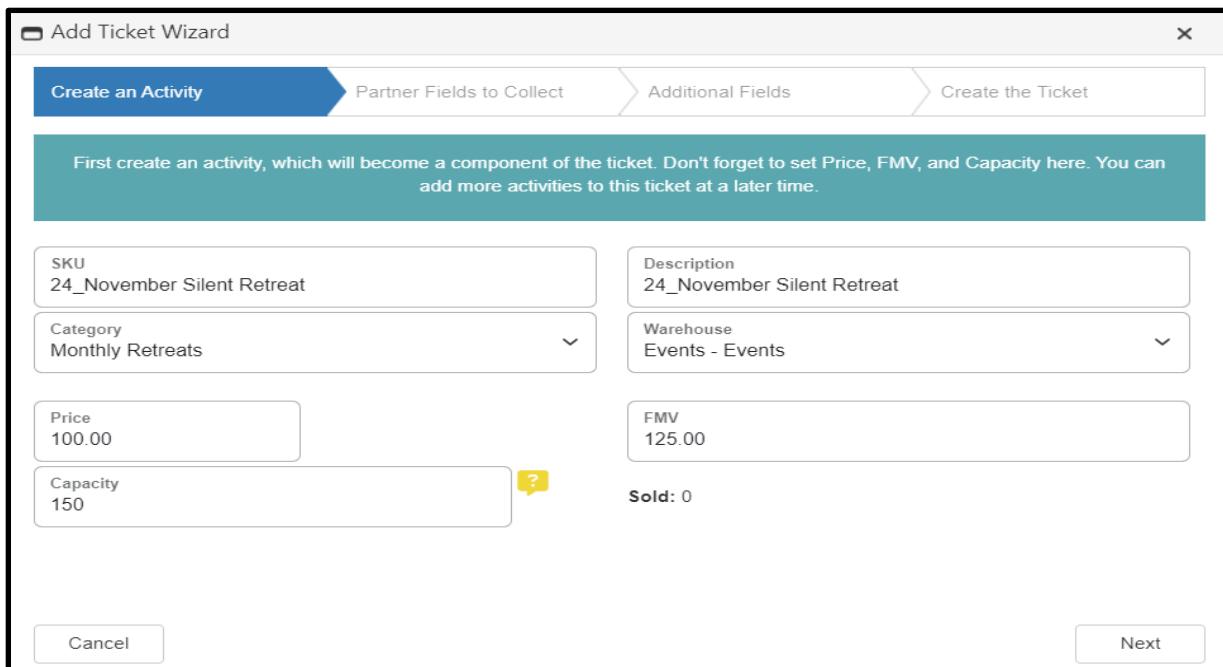
[Copy Tickets From Another Event](#)
[Import Event Attendance File](#)
[Export Event Attendance File](#)
[Use Ticket Wizard for a Quick Add](#)

Creating Event Activities & Tickets

1. Click the **Tickets** tab
2. When the **Would you like to do a Quick Add** screen displays, click the **Let's Do It** button.



3. The **Create an Activity** step of the **Add Ticket Wizard** displays.
4. In the **SKU** and **Description** fields, the previously entered **Event Name** defaults.
 - Users can edit one or both of these fields to fit their desired values.
5. From the **Category** dropdown select desired Inventory folder to store the Ticket.
6. From **Warehouse** dropdown select desired Inventory warehouse to store Ticket.
7. In the **Price** field, enter the desired value.
8. Enter the **FMV** (Fair Market Value) for the ticket claimed as a tax deduction.
9. In the **Capacity** field, enter desired value – **do NOT leave as 0**.
 - NOTE: The Capacity MUST be filled out to ensure the ticket is processed.



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 24_November Silent Retreat	Description 24_November Silent Retreat
Category Monthly Retreats	Warehouse Events - Events
Price 100.00	FMV 125.00
Capacity 150	Sold: 0

Cancel | Next

10. Click the **Next** button.

11. The **Partner Fields to Collect** step of the **Add Ticket Wizard** displays.

- The fields added to the Selected Fields pane are the values that are collected from the registrant from an Operator in Rapid Entry.

12. From the **Available Fields** pane, select the desired fields and drag and drop them to the **Selected** Fields pane.

- Users can select multiple values by using the Ctrl key for non-consecutive fields and the Shift key for consecutive fields.

13. Users can select the **Required** checkbox for each field that is necessary for an Operator to collect during the event registration.

- Operators CANNOT process a ticket in Rapid Entry unless all required fields are completed.
- Tip: Select the **Mark all as Required** checkbox to require that all of the information in the Selected Fields pane be collected from a registrant. Then users can uncheck the few that are NOT required.

The screenshot shows the 'Add Ticket Wizard' window with the 'Partner Fields to Collect' step active. The wizard progress bar at the top shows four steps: 'Create an Activity', 'Partner Fields to Collect' (highlighted in blue), 'Additional Fields', and 'Create the Ticket'. Below the progress bar, instructions state 'Move fields by dragging them or by using buttons.' The interface is divided into two main panes: 'Available Fields' on the left and 'Selected Fields' on the right. The 'Available Fields' pane contains three items: 'No Direct Mail' (highlighted in blue), 'No Phone Solicitation', and 'No Email Solicitation'. The 'Selected Fields' pane contains a list of fields with checkboxes: 'Mark all as Required' (highlighted with a red box), 'First Name' (checked), 'Middle Name', 'Last Name' (checked), 'Company', 'Address 1', 'Address 2', 'City', 'State or Prov', 'Postal Code', 'Home Phone', 'Business Phone', and 'Mobile Phone'. At the bottom of the window, there are three buttons: 'Cancel', 'Previous', and 'Next'.

14. Click the **Next** button.

15. The **Additional Fields** step of the **Add Ticket Wizard** displays.

- Users can define unique fields from which the Rapid Entry Operator can collect information for this particular ticket.
- Example: For food-based events Operators collect specific dietary choices.

16. Click **+ Add New Field**.

17. Enter a **Name** for the field.

18. Select the **Data Type**.

- IF needed, Administrators can define additional Pick List values in the Administration module>Pick Lists folder.

19. Click **Insert**.

The screenshot shows the 'Add Ticket Wizard' interface. At the top, a progress bar indicates the current step is 'Additional Fields'. Below this, a table is used to define additional fields. The table has three columns: 'Name', 'Data Type', and 'Required'. A 'Data Type' dropdown menu is open, showing a list of options: Currency, Date, Decimal, Memo, Number, Text, Yes/No, Yes/No/Unknown, and PickList. The 'Currency' option is currently selected. The 'Required' column has a checkbox that is currently unchecked. At the bottom of the wizard, there are three buttons: 'Cancel', 'Previous', and 'Next'.

Name	Data Type	Required
	Currency	<input type="checkbox"/>

20. Click the **Next** button.

21. The **Create the Ticket** step of the **Add Ticket Wizard** displays.

- This is the step that adds the unique ticket to the Activity.

22. From the **Category** dropdown select desired Inventory folder to store the Ticket.

23. From the **Warehouse** dropdown select desired Inventory warehouse to store the Ticket.

24. Users can select the **Will Fulfill** checkbox if it is necessary to send the ticket order to the warehouse.

- This is usually done if there is a physical component/giveaway to be delivered as a result of ticket purchase.

25. Click **Finish** to create the ticket for this activity.

Add Ticket Wizard

Create an Activity | Partner Fields to Collect | Additional Fields | **Create the Ticket**

Create a ticket for the event, which can be used to register someone.
Price and FMV are calculated based on the activities tied to this ticket.

SKU: 24_November Silent Retreat-Ticket
Description: 24_November Silent Retreat Ticket
Category: Monthly Retreats
Warehouse: Events - Events
Price: 100.00
FMV: 125.00
For Sale:
Will Fulfill:
Max: 0
Sold: 0
Buttons: Cancel, Previous, Finish

26. The **Ticket Successfully Created** pop-up screen will briefly display.

27. The **Tickets** tab displays with the added **Event Activities** and **Tickets** displayed.

Event: 24_November Silent Retreat - 2024 November Silent Retreat

Save Reports

General Acknowledgments **Tickets** Volunteer Staff Sponsors Inventory Documents Permissions

Event Activities

+ Add Event Activity Refresh

SKU	Description	Capacity	Available	Sold	Attended	Price
24_November Silent Retreat	24_November Silent Retreat	150	150	0	0	\$100.00

Statistics

Tickets Sold: 0
 Max Capacity: 0
 Attendance: 0
 Ticket Revenue: \$0.00

Tickets

+ Add Ticket Refresh

SKU	Description	Max	Available	Sold	For Sale	Price
24_November Silent Retreat-Ticket	24_November Silent Retreat Ticket	150	150	0	✓	\$100.00

Actions

[Copy Tickets From Another Event](#)
[Import Event Attendance File](#)
[Export Event Attendance File](#)
[Use Ticket Wizard for a Quick Add](#)

Creating Event Sponsorships AS Tickets

Users could also use the **Quick Add Wizard** to create **Sponsorships as Tickets**. This might be attractive to users as it would be quicker to create than by doing so under the Inventory module separately AND would be more easily trackable as a part of the **Export Event Attendance File**.

VOLUNTEER STAFF TAB

On the Volunteer Staff tab users can use both the Shifts and Staffing sections to manage their personnel working an event.

Shifts – enables users to add a distinct Role with Start and End Times and defined Capacity (number of Volunteers needed). Once created, it automatically tracks the fulfillment of the Capacity as volunteers are added and assigned Shifts under the Staffing section.

Staffing – enables users to assign Volunteers to defined Shifts and track which Volunteer has responsibility for which Shift, displays their contact information, and tracks if they have Completed their assignment.

Creating a Shift

1. Click on the **Add new shift** button.
2. Add a **Role** from the **Role** dropdown.
 - Administrators can create new Roles to populate this dropdown under the Administration module.
3. Add a **Shift Date** from the date picker.
4. Add a **Start Time** and **End Time**.
5. Add the **Capacity** from the Numeric picker – this determines the staff number needed to fully staff the role and links to Staffing below.

Shifts						
+ Add new shift Refresh						
	Role	Description	Date	Start Time	End Time	Capacity
	Role Clean Up Crew	Clean Up Crew	Shift Date 11/17/2024	Start Time 5:00 PM	End Time 8:00 PM	Capacity 5
	General Volunteer	General Volunteer	11/16/2024	09:00 AM	05:00 PM	0 of 3 filled
	General Volunteer	General Volunteer	11/17/2024	09:00 AM	05:00 PM	0 of 3 filled
	Greeter	Greets people at HQ	11/16/2024	07:00 AM	10:00 AM	1 of 3 filled
	Set Up Crew	Set Up Crew	11/15/2024	05:00 PM	08:00 PM	2 of 5 filled

6. Click the **Save** button to the right of the newly created Role.

Creating Staff Assignments

1. Click on the **Add new staff assignment** button.
2. From the **Volunteer Search** screen that displays, Locate and click on the check box for the desired Donor record to staff the role.

Volunteer Search

Locate a Volunteer

Donor ID Exact Match Head of Household

Company First Name Last Name

Address City Title Phone

Country / FIPS Country State / Province Postal Code

Refresh

Page size: 50 1 items in 1 pages

Donor ID	Name	Address	Company	Start Date
<input checked="" type="checkbox"/> 40672406	Gial Ackbar	96767 Walker St Apt 12 Lowell, MA 01854-3149		2009-11-17

Page size: 50 1 items in 1 pages

3. From the new **Staff Assignment**, click on the **Shift** dropdown and select the desired value to assign to the **Volunteer**.

Staffing

+ Add new staff assignment Refresh | X

Shift	Volunteer ID	Name	Phone	Email	Completed
- Select a Filter -					
<input checked="" type="checkbox"/> <input type="checkbox"/> Shift General Volunteer -- 11/16/2024, 09: <input type="text" value="v"/>	40672406	Gial Ackbar		gackbar@demodata.com	<input type="checkbox"/>
<input checked="" type="checkbox"/> <input type="checkbox"/> Greeter -- 11/16/2024, 07:00 AM - 10:00 AM	40676076	Jon Smith		jsmith@demodata.com	<input type="checkbox"/>
<input checked="" type="checkbox"/> <input type="checkbox"/> Set Up Crew -- 11/15/2024, 05:00 PM - 08:00 PM	40000508	Ryann Daniela			<input type="checkbox"/>

4. Click the **Save** button to the right of the newly created **Shift**.

5. Users can also track the **Shift Status** by clicking on the check to the left of the Shift. This updates the Completed toggle to the right of each record.
- In the example below, the **Greeter** record was updated via its checkbox - once it was clicked it disappeared and the **Completed** toggle turned on.
 - The **Set Up Crew** recorded is **NOT Completed** - the checkbox is still available, and the Completed toggle is off.

Staffing						
+ Add new staff assignment Refresh X						
	Shift	Volunteer ID	Name	Phone	Email	Completed
	- Select a Filter -					
	Greeter -- 11/16/2024, 07:00 AM - 10:00 AM	40676076	Jon Smith		jsmith@demodata.com	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Set Up Crew -- 11/15/2024, 05:00 PM - 08:00 PM	40000508	Ryann Daniela			<input type="checkbox"/>

SPONSORS TAB

The Sponsors tab enables users to both define and add Sponsorships: the **Sponsorship Levels And Benefits** section and **All Sponsors For This Event** section.

The **Sponsorship Levels And Benefits** enables users to add levels and define details of those levels: Level name, Description, Priority order, Color code, Activity status and Capacity (number of sponsors that can be added to the level). Once those levels are defined, they auto link to any actual sponsors that are added in the **All Sponsors For This Event** section and the Sponsorship Level's Capacity is updated.

The **All Sponsors For This Event** section enables users to view existing Sponsors tied to this level as well as **Add a New Sponsorship** as desired.

Creating Sponsorship Levels and Benefits

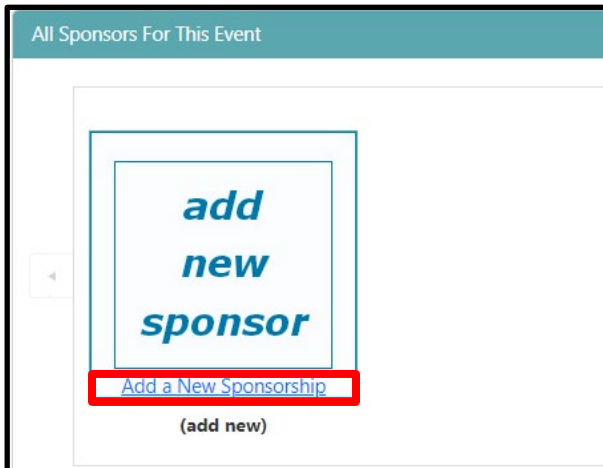
1. Click on the **+Add New Sponsorship Level** button.
2. Enter a desired level name in the **Level** field.
3. Enter a description for the level in the **Description** field.
4. Select the desired priority number from the **Priority** dropdown.
 - The lowest number assigned will be the first displayed in the list of levels.
5. Select a color to assign the level from the **Color** lookup dropdown – click the **Apply** button once the desired variance of the color has been clicked on.
6. Ensure the **Active** button is checked; uncheck if NOT activating the level.
7. Select the desired capacity number from the **Capacity** dropdown.
 - The Capacity Number will map against how many Sponsors are added from the **All Sponsors For This Event** section and will update how many slots out of total capacity as records are added in that section.

Level	Description	Priority	Color	Active	Capacity
Gold	5K Plus Sponsor	1	Orange	<input checked="" type="checkbox"/>	18

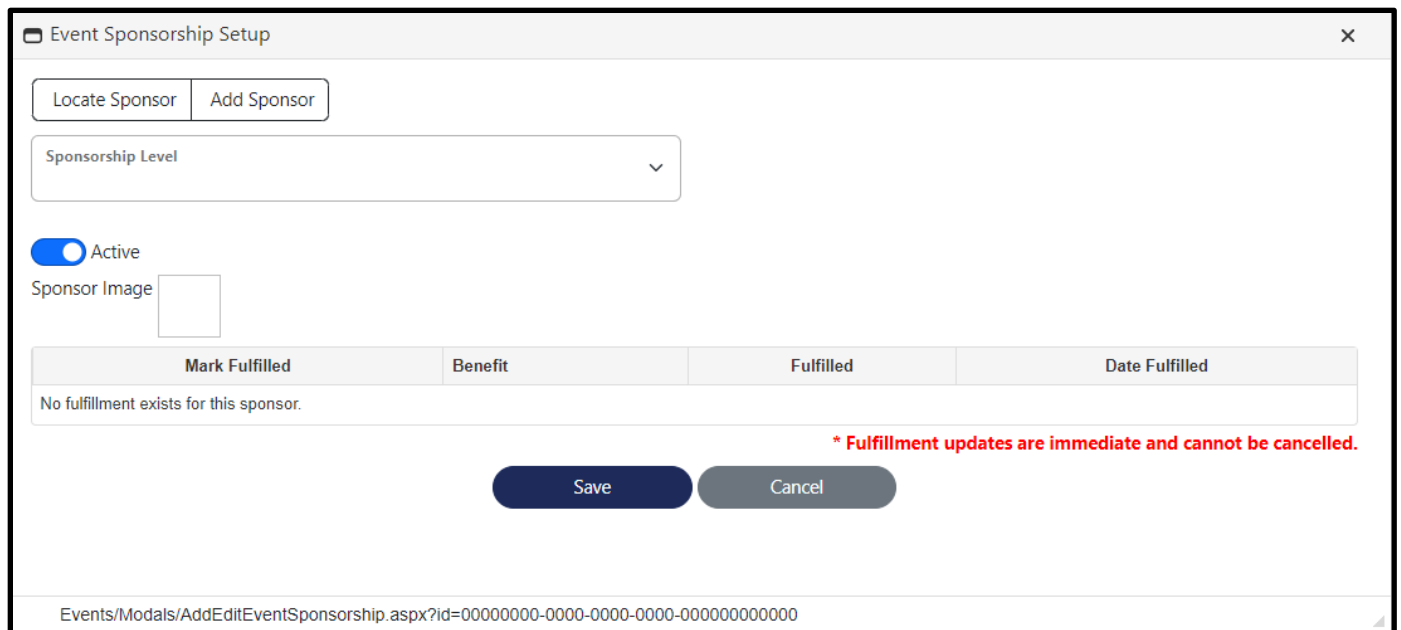
8. Click on the **Save** button to the far left of the row.

Creating All Sponsors For This Event

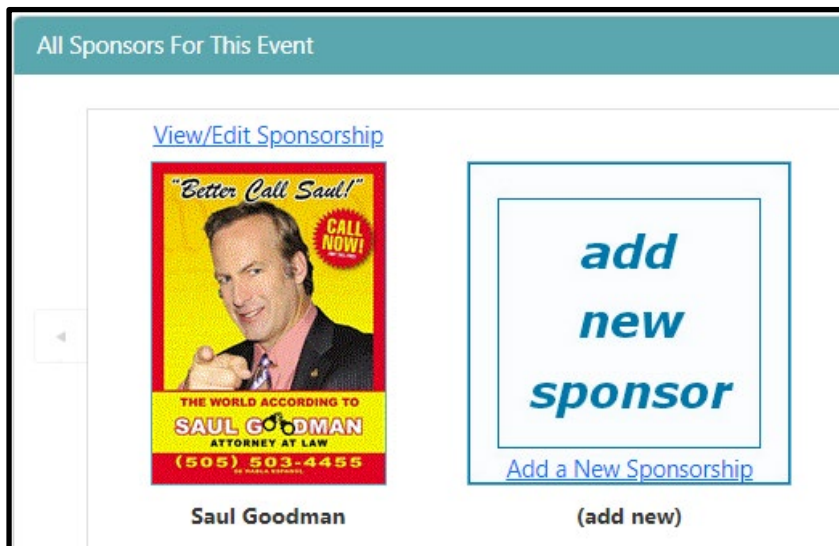
1. Click on the **Add a New Sponsorship** at the bottom of the **Sponsor** square under the **All Sponsors For This Event** section.
 - The **Add New** link will ONLY appear if there are defined levels in existence under the **Sponsorship Levels And Benefits** section above.



2. The **Event Sponsorship Setup** screen displays.

A screenshot of a modal window titled "Event Sponsorship Setup". At the top, there are two buttons: "Locate Sponsor" and "Add Sponsor". Below them is a dropdown menu labeled "Sponsorship Level". There is a toggle switch for "Active" which is currently turned on. Below the toggle is a "Sponsor Image" field with a small square placeholder. At the bottom of the modal, there is a table with four columns: "Mark Fulfilled", "Benefit", "Fulfilled", and "Date Fulfilled". The table is currently empty, with the text "No fulfillment exists for this sponsor." displayed below it. Below the table, there is a red asterisked note: "* Fulfillment updates are immediate and cannot be cancelled." At the very bottom of the modal are two buttons: "Save" and "Cancel". The URL at the bottom of the page is "Events/Modals/AddEditEventSponsorship.aspx?id=00000000-0000-0000-0000-000000000000".

3. Click on either the **Locate Sponsor** or **Add Sponsor** to enter the desired Sponsor information.
 - **Locate Sponsor** will bring up a Locate Donor Search screen.
 - **Add Sponsor** will enable users to enter a New Donor record.
4. From the **Sponsorship Level** dropdown, users can select which of the Sponsorship levels the Donor desires taken from the Sponsorship Levels added to the **Sponsorship Levels and Benefits** section above.
5. Users can turn off the **Active** toggle if desired.
6. Users can enter a **Sponsor Image** as desired.
7. Once added the **Sponsor Image** will display below the section.



INVENTORY TAB

The **Inventory** tab lists the items that will be displayed for the Rapid Entry Operator whenever placing an order linked to this Event. An Operator may select any of the listed items. Tickets that are created under the **Tickets** tab automatically display in this section.

Event: 24_NSR - 2024 November Silent Retreat

Save Reports

General Acknowledgments Tickets Volunteer Staff Sponsors **Inventory** Documents Permissions

Available Inventory

Remove	SKU	Description	Warehouse	Type
	24_NSRT	24_November Silent Retreat Ticket	Events	Order

Add Product Add Enclosures

Users can add already existing (built) Products and **Enclosures** (Kits) to this section. If the desired product has not been built – users must go to the **Inventory** module to add the desired product/kit.

ANY Product Added to Inventory will display in Rapid Entry associated with the Event for ease of purchase.

For more information on the steps for adding those items please access the **Inventory** manual from the **Aegis Help** site.

DOCUMENTS TAB

Documents

The **Documents** tab enables users to Add any documents to the Acknowledgements record. Users may have a need to add images or larger descriptions as part of the permanent record.

1. Click on the **+Add new record** button.
2. A **File Uploader** pop-up screen displays.
 - Users can browse to a file and **Upload**.
 - Users can also add a short **Description** as desired.

+ Add new record Refresh

Document Name	Description	Appeal	Date Created	Operator	Archived?
Document Name:	Allowed extensions: .doc, .docx, .pdf, .gif, .jpg, .png, .rtf, .xls, .xlsx, .msg, .wav, .mp3, .wma Maximum allowed file size is 1000 KB				
Description:	<input type="text"/>				

Upload

Insert **Cancel**

No documents to display.

3. Click on **Insert**.
4. The file displays as an entry under the **Documents** listing.

Appeal Document Library Show Archived Documents

+ Add new record Refresh

	Document Name	Description	Appeal	Date Created	Operator	Archived?
	Acknowledgement Detailed Description		BSDN	03/19/2024	Dave O'Connell	

5. Users can **Edit, Read, Download, and Delete** with appropriate permissions.

PERMISSIONS TAB

Permissions

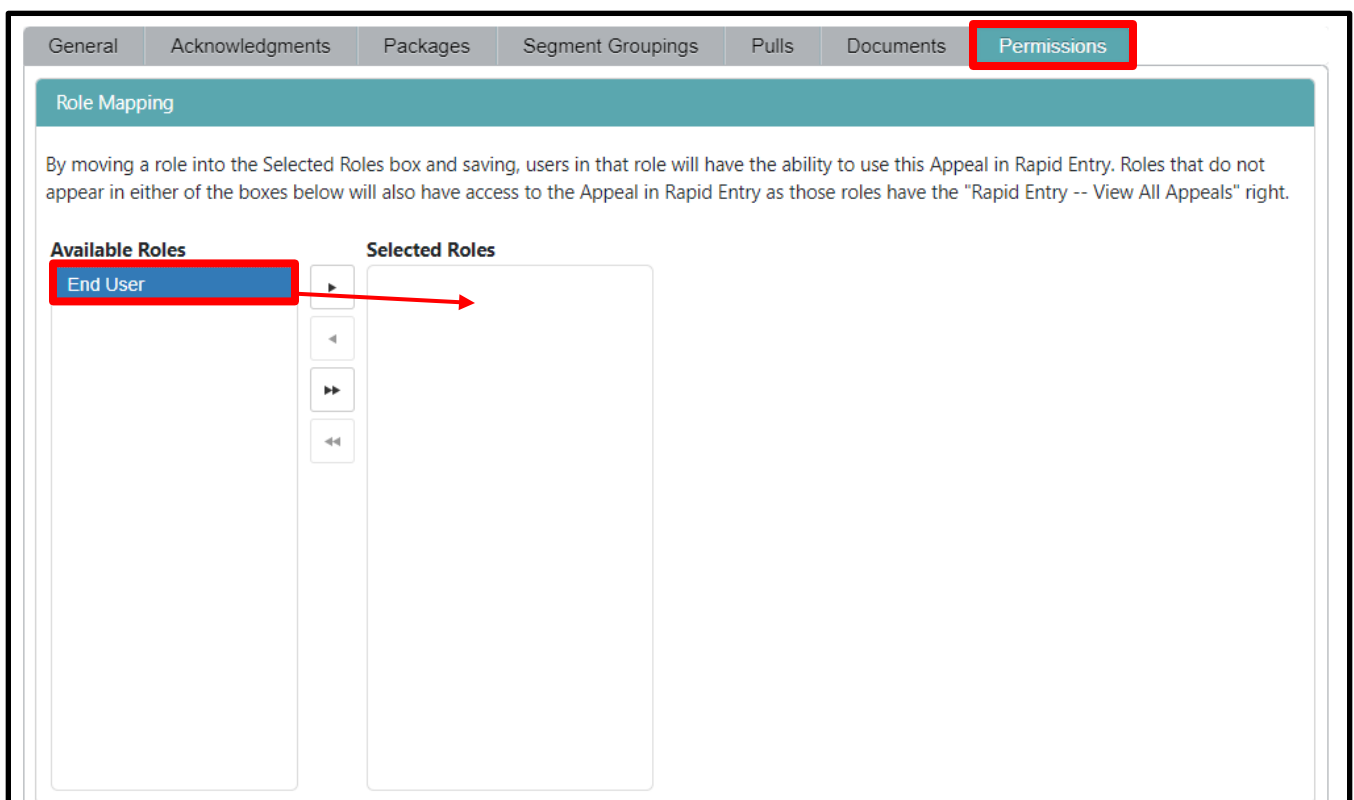
The **Permissions** tab enables users to set security by **Roles** on which users can view or not view the Appeal in **Rapid Entry**.

This can be extremely helpful for clients with a high volume of Appeals in which certain Roles – groups of users – are only required to view a sub-set of Appeal records. Those Roles can then be “assigned” to those Appeals and not need to wade through the bulk of Appeals in order to find those on which they must focus.

IMPORTANT NOTE: In order for this tab to function, an **Administrator** must set up the targeted user role under the **Administration>Security Roles** sub-module and ensure role has **Rapid Entry – View All Appeals** right moved from Selected Rights under Available Rights. **By DEFAULT, this right resides under Selected Rights.**

To set up Permissions:

1. Select on the **Role** under the **Available Roles** column.
2. **Drag and Drop the Role** to the **Selected Roles** column.
3. That role will now be able to view the **Appeal in Rapid Entry**.



Event Purchases in Rapid Entry

Rapid Entry enables the purchasing of two distinct types of products associated with an Event: **Tickets** (Registrations) and **Products** (Sponsorships and physical Products). Each of these types is entered through different methods. Users can choose to purchase Tickets by displaying the Events section of the Batch or can simply continue using the Products section to purchase. The actual steps in adding a Ticket vs. adding a Product (Sponsorship or Water Bottle, T-Shirt, etc.) are where the differences occur.

In the exercises below, users will see the steps for adding a Ticket to a Batch first, and then for adding a Sponsorship (Product) to a Batch.

Adding Tickets to a Batch STEPS

1. **Find and Open** the desired Batch.
OR – If Batch just created:
 Click **Save and Open** to proceed to the **Add Transactions** screen of the Batch.
2. The **Add Transactions** page displays.
3. Search for and select the **Donor** to whom to add the **Transaction**.
4. Click on the **Events** dropdown and select the desired Event.
 - IF the **Events** panel/dropdown is NOT visible, users can Add the section by
 - Clicking on the **View** menu at the top of the screen and clicking on the **Show Event Panel**
 - Clicking **F7** on their keyboard

The screenshot shows a donor profile for Geoffrey Maverick. The 'Events' dropdown menu is open, displaying a list of events. The event '24_OCC - 2024 October CATERED Cookout' is selected and highlighted in blue. Other events in the list include '24_DSR - 2024 December Silent Retreat', '24_NSR - 2024 November Silent Retreat', '24_PSS - 2024 Potomac Club Summer Splash', and '24_TGT - 2024 Thanksgiving Golf Tournament'. The donor's contact information and contribution history are also visible.

5. To the Right of the Selected **Event**, click on the **Tickets** button.

6. The **Multiple Product Selection** screen displays – users can select from ANY product that was set up as a **Ticket** under the Event, Ticket tab OR linked as a **Product** under Event, Inventory tab.

7. In this example, the user has selected one **Adult Ticket** and one **Bronze Sponsorship** for purchase.

Item #	Quantity	Description	Code	Category	Action
1	1	(\$35.00) - 24_October Catered Cookout Adult Ticket	24_OCCAT	Events	Order
2		(\$15.00) - 24_October Catered Cookout Child Ticket	24_OCCCT	Events	Order
3		(\$20.00) - 24_October Catered Cookout Spouse Ticket	24_OCCST	Events	Order
4		(\$5,000.00) - 24_October Catered Cookout Sponsorship - GOLD	24_OCCSP-GOLD	Events	Order
5		(\$2,000.00) - 24_October Catered Cookout Sponsorship - SILVER	24_OCCSP - SILVER	Events	Order
6	1	(\$500.00) - 24_October Catered Cookout Sponsorship - BRONZE	24_OCCSP-BRONZE	Events	Order

8. Click **OK** to **Save** the selections

- NOTE: If users are collecting additional information for certain Ticket Types: Food Preference, Shirt Size, Child’s Parent Email etc. they will automatically be taken into an editing screen to add that information upon saving

9. Enter the **Payment** amount for the products purchased.

10. **Save and Close** the Batch.

11. Conducting a **Locate Transaction** search for a **Transaction** record with Tickets and/or Products will yield a similar result to that shown in the screenshot below.

- Observe the two items located under the Product section – both a **Ticket** sale and a **Sponsorship** display.

Geoffrey Maverick - 40000020

Transaction Summary - Service

Total Transaction Amount: \$0.00
Balance Due: \$0.00
Status: Pending
Invoice ID: 751280
Appeal: 24_OCC - 2024 October Catered Cookout
Channel:
Response Static Segment: A05
Batch Number: 11776
Batch Category: Cash/Check General
Date Entered: 10/15/2024
Event(s): 24_OCC - 2024 October Catered Cookout
Regional Development Director: [Modify](#)
Actions: [Return / Refund](#)

Batch Description: General Cash/Check
Date Requested: 10/15/2024
Response(s) Selected:

Payments

Type	Reference	Payment Details	Amount	Status
▶ Cash		Details	\$535.00	Received

Payment Total: \$535.00

Products

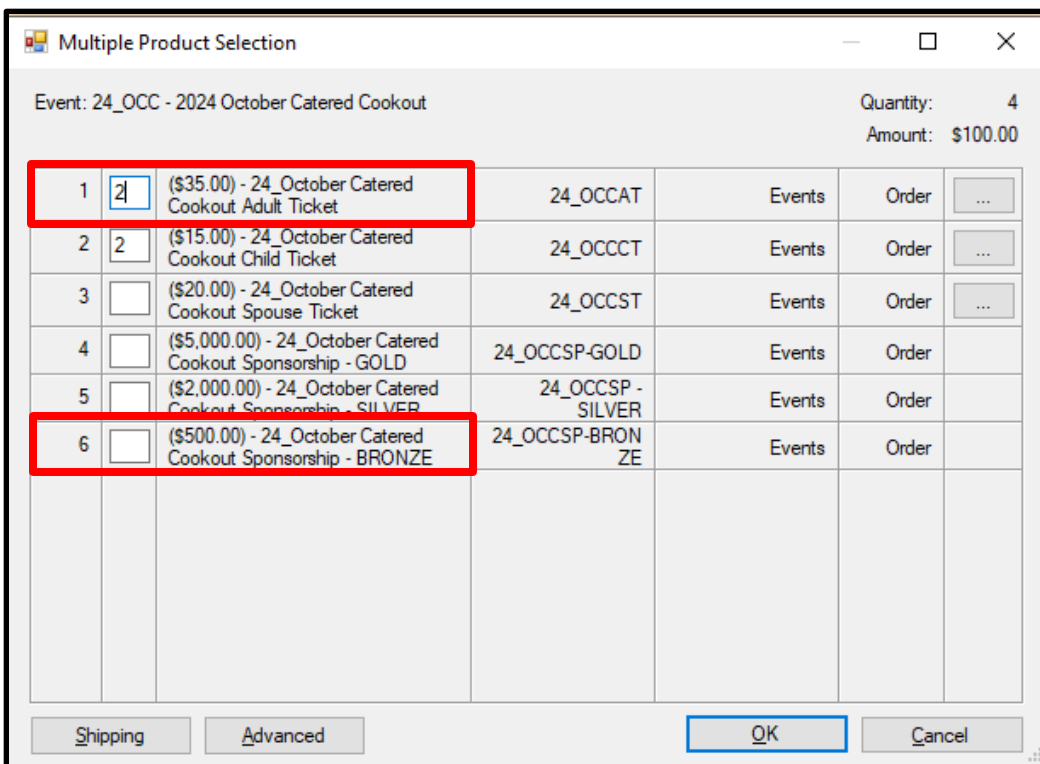
+ Add new Product

Description	Status	Last Update	Qty	FMV	Unit Price	Discount	Ext Price	Details
▶ 24_OCCAT - 24_October Catered Cookout Adult Ticket For use in tracking all event registration sales.	Pending	10/15/2024 10:13:05 AM	1	\$50.00	\$35.00	\$35.00	\$0.00	Details
▶ 24_OCCSP - BRONZE - 24_October Catered Cookout Sponsorship - BRONZE For use in tracking all event registration sales.	Pending	10/15/2024 10:13:05 AM	1	\$0.00	\$500.00	\$500.00	\$0.00	Details

Product Sub-Total: \$0.00
Product Total: \$0.00

Adding AND Editing Multiple Tickets on a Batch STEPS

1. **Find and Open** the desired Batch.
OR – If Batch just created:
 Click **Save and Open** to proceed to the **Add Transactions** screen of the Batch.
2. The **Add Transactions** page displays.
3. Search for and select the **Donor** to whom to add the **Transaction**.
4. **Find and Open** the desired Batch.
OR – If Batch just created:
 Click **Save and Open** to proceed to the **Add Transactions** screen of the Batch.
5. The **Add Transactions** page displays.
6. Search for and select the **Donor** to whom to add the **Transaction**.
7. Click on the **Events** dropdown and select the desired Event.
8. To the right of the Selected **Event**, click on the **Tickets** button.
9. **Select** the targeted ticket and enter the desired **Amount** to purchase – in this example the user will select two Adult tickets and two Children’s tickets.

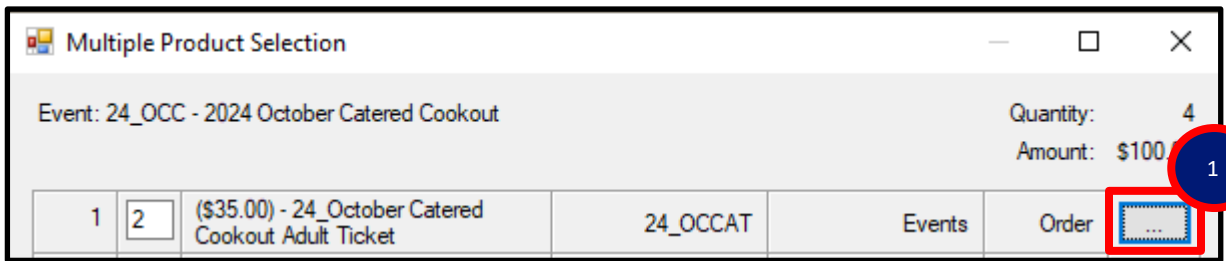


10. Clicking on the **Ellipsis (...)** on the far right of a line enables the user to edit the particulars of any of the tickets.

- This is usually done to enter the correct registrant for any additional tickets

In the example:

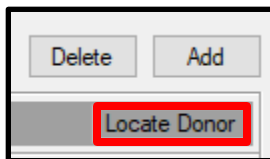
- 1 The **Ellipsis** for the Adult ticket line is clicked opening the registrant record.



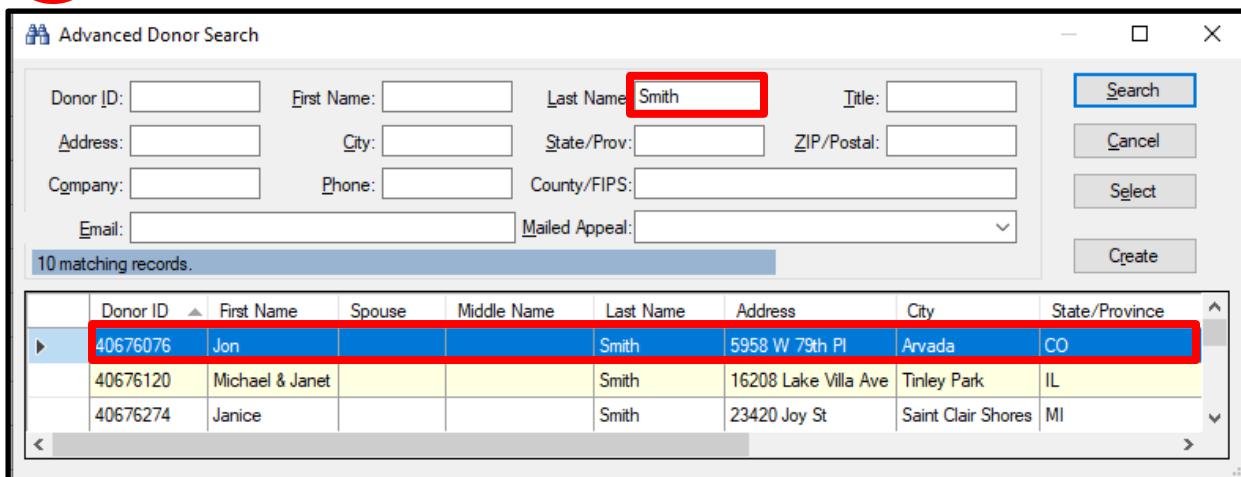
- 2 From the upper left of the screen, the user navigates to the second Registrant record using the **right arrow**.



- 3 Once on the desired record, the user clicks the **Locate Donor** button in the upper right of the screen.



- 4 The user searches for and selects the desired Donor for the second registration.



- 5 The selected Donor is now listed as the second Registrant by clicking the **OK** button.

Specify Attributes For 24_OCCAT - 24_October Catered Cookout Adult Ticket

Item 1 of 2

Donor ID: 40676076

New Donor

Locate Donor

First Name: Jon

Middle Name:

Last Name: Smith

Company:

Address 1: 5958 W 79th Pl

Address 2:

City: Arvada

State or Prov: CO

Postal Code: 80003

Home Phone:

Business Phone:

Mobile Phone:

Email: jsmith@demodata.com

Food Preference:

OK

Cancel

11. Continuing this scenario, the user clicks on the Ellipsis next to the **Child** ticket, clicks **Locate Donor**, and fills out the **Parent Mobile Phone & Parent Full Name**.
- These fields are required and must be completed to save the Registration.

Specify Attributes For 24_OCCAT - 24_October Catered Cookout Adult Ticket

Item 1 of 2

Donor ID: 40678821

New Donor

Locate Donor

First Name: Kathleen

Last Name: Smith

Address 1: 362 Guys Run Rd

City: Cheswick

State or Prov: PA

Postal Code: 15024-4300

Mobile Phone:

Parent Mobile Phone: 555 555-5555

Food Preference:

Parent Full Name: Alette Smith

OK

Cancel

12. The user would then use the upper left arrows to navigate to the second Child record and update the **Donor Name** and required fields.

Registration Report

There is one location where users can receive a comprehensive and updated Registration report – from the Tickets tab of the Event Record. There are NO Queries or Analytics Reports that display this level of detail.

Running the Export Event Attendance File STEPS

1. **Find and Open** the desired Event.
2. Click on the **Tickets** Tab.
3. From the right-hand **Actions** menu, click the **Export Event Attendance File** link.
4. The file will display in your **Browser** downloads as well as in your **Downloads** folder in the **File Explorer** of your computer.
5. By default, the file displays the following 34 fields and their data per registration (ticket purchased).
 - **Green**: Both the **Purchased** and **Registered** info is included
 - **Yellow**: **Variable** fields added by the user for ticket specific requirements.

The (SKU)	Title
Activity (Event)	Salutation
Activity Description (Event Description)	FirstName
Quantity	Last Name
Ticket	Address
Ticket Description	City
Ticket Price	State
Ticket Discount	Zip
Net Price	Phone
Balance Due	Email
Date Entered	Attended (Status)
Payments Received	Response Date
Batch ID	Food Preference
Invoice Number	Parent Full Name
Purchased By ID	Parent Mobile Phone
Purchased By	Spouse Full Name
Registered User ID	
Registered User	

6. Report Example:

The	Activity	Activity Description	Quantity	Ticket	Ticket Description
24_OCC	24_OCCA	24_October Catered Cookout Adult	1	24_OCCAT	24_October Catered Cookout Adult Ticket
24_OCC	24_OCCA	24_October Catered Cookout Adult	1	24_October Catered Cookout Adult-Ticket	24 Catered Cookout Adult - Ticket
24_OCC	24_OCCA	24_October Catered Cookout Adult	1	24_OCCAT	24_October Catered Cookout Adult Ticket
24_OCC	24_OCCA	24_October Catered Cookout Adult	1	24_OCCAT	24_October Catered Cookout Adult Ticket
24_OCC	24_OCCA	24_October Catered Cookout Adult	1	24_October Catered Cookout Adult-Ticket	24 Catered Cookout Adult - Ticket
24_OCC	24_OCCA	24_October Catered Cookout Adult	1	24_October Catered Cookout Adult-Ticket	24 Catered Cookout Adult - Ticket
24_OCC	24_OCCA	24_October Catered Cookout Adult	1	24_OCCAT	24_October Catered Cookout Adult Ticket
24_OCC	24_OCCC	24_October Catered Cookout Child	1	24_OCCCT	24_October Catered Cookout Child Ticket
24_OCC	24_OCCC	24_October Catered Cookout Child	1	24_October Catered Cookout Child-Ticket	24_October Catered Cookout Child Ticket
24_OCC	24_OCCC	24_October Catered Cookout Child	1	24_OCCCT	24_October Catered Cookout Child Ticket
24_OCC	24_OCCS	24_October Catered Cookout Spouse	1	24_October Catered Cookout Spouse-Ticket	24_October Catered Cookout Spouse Ticket

Ticket Price	Ticket Discount	Net Price	BalanceDue	DateEntered	Payments Received	BatchID	InvoiceNumber	PurchasedByID	PurchasedBy
35	0	35	0	10/15/2024 11:51	100	11777	751281	40679894	Arlette Smith
35	0	35	0	9/18/2024 5:13	35	11752	749472	40679894	Arlette Smith
35	35	0	0	10/15/2024 10:13	0	11776	751280	40000020	Geoffrey Maverick
35	0	35	0	10/15/2024 11:51	100	11777	751281	40679894	Arlette Smith
35	0	35	0	9/17/2024 13:27	70	11751	749471	40676735	Martin Brody
35	0	35	0	9/18/2024 5:13	35	11752	749473	40000191	Rick Darius
35	0	35	0	10/15/2024 8:06	535	11774	751279	40000191	Rick Darius
15	0	15	0	10/15/2024 11:51	100	11777	751281	40679894	Arlette Smith
15	0	15	0	9/17/2024 13:27	70	11751	749471	40676735	Martin Brody
15	0	15	0	10/15/2024 11:51	100	11777	751281	40679894	Arlette Smith
20	0	20	0	9/17/2024 13:27	70	11751	749471	40676735	Martin Brody

RegisteredUserID	RegisteredUser	Title	Salutation	FirstName	LastName	Address	City	State	Zip	Phone	Email
40679894	Arlette Smith			Arlette	Smith	350 Monroe St	Napa	CA	94559-3726		arlette@demo-data.com
40679894	Arlette Smith			Arlette	Smith	350 Monroe St	Napa	CA	94559-3726		arlette@demo-data.com
40000020	Geoffrey Maverick		Geoff	Geoffrey	Maverick	31078 2nd Ave S	South Saint Paul	MN	55075-3006		gmaverick@demodata.com
40676076	Jon Smith			Jon	Smith	5958 W 79th Pl	Arvada	CO	80003		jsmith@demodata.com
40676735	Martin Brody		Chief	Martin	Brody	194 E Chop Dr	Vineyard Haven	MA	02568-2156		mbrody@demo-data.com
40000191	Rick Darius			Rick	Darius	26496 King St	Imperial	MO	63052-4000		rdarius@demodata.com
40000191	Rick Darius			Rick	Darius	26496 King St	Imperial	MO	63052-4000		rdarius@demodata.com
40678821	Kathleen Smith			Kathleen	Smith	362 Guys Run Rd	Cheswick	PA	15024-4300		ktsmith@demodata.com
40676086	Sean Brody			Sean	Brody	194 E Chop Dr	Vineyard Haven	MA	02568-2156		sbrody@demo-data.com
40679450	Thomas Smith			Thomas	Smith	5807 81st St	Kenosha	WI	53142-4131		thomas@demo-data.com
40676093	Ellen T. Brody			Ellen	Brody	194 E Chop Dr	Vineyard Haven	MA	02568-2156		ebrody@demo-data.com

Attended	Response Date	Food Preference	Parent Full Name	Parent Mobile Phone	Spouse Full Name
0	NA				
0	NA	Fish			
0	NA				
0	NA				
0	NA				
0	NA	Vegan			
0	NA				
0	NA		Arlette Smith	555 555-5555	
0	NA				
0	NA		Arlette Smith	555 555-5555	
0	NA				

Event Administration Setup

In order for the Events module to display all the tabs that are necessary for utilizing in the most complete manner, a client Administrator will have to navigate to the Administration tab and enable the following:

Enabling Events in Aegis STEPS

1. Click on the **Administration** tab.
2. Click on the **System Access** folder.
3. Click on the **System Settings** sub-folder.
4. Under the **Manage System Settings>Appeals** section, toggle on:
 - Allow Appeal/Inventory Associations (This will display the Inventory tab on Appeals page.)
 - Allow Enhanced Events (This will display the Events tab on Appeals Page)

The screenshot displays the 'Client Administration' interface. On the left sidebar, the 'Administration' tab is highlighted with a red box. The main content area shows the 'Manage System Settings' section, with the 'Appeals' sub-section highlighted in a red box. Within the 'Appeals' section, two settings are toggled on:

- Allow Appeal/Inventory Associations (This will display the **Inventory** tab on Appeals page.)
- Allow Enhanced Events (This will display the **Events** tab on Appeals page.)

Other visible settings include:

- Rollover Appeal Support
- Show Total Cost Of Products Sold
- Allow Partial Shipments
- Allow Payments Across Multiple Days
- Stock Reorder Notification Enabled
- Stock Reorder Notification Email (separate multiple email addresses with a semicolon)
- Show *Is Annuitant* label on View Donor screen
- Show *Next Follow-up Date* label on View Donor screen
- Show *Next Follow-up Date* column in Donor Notes list
- Show # *Attempts* field for Donor Notes
- State of the Database - MA1001 (Show # Emails Appended Row)
- Email Engine Enabled
- Allow Balance Due
- Warn On Balance Due