# EVENTS

## Table of Contents

## 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.

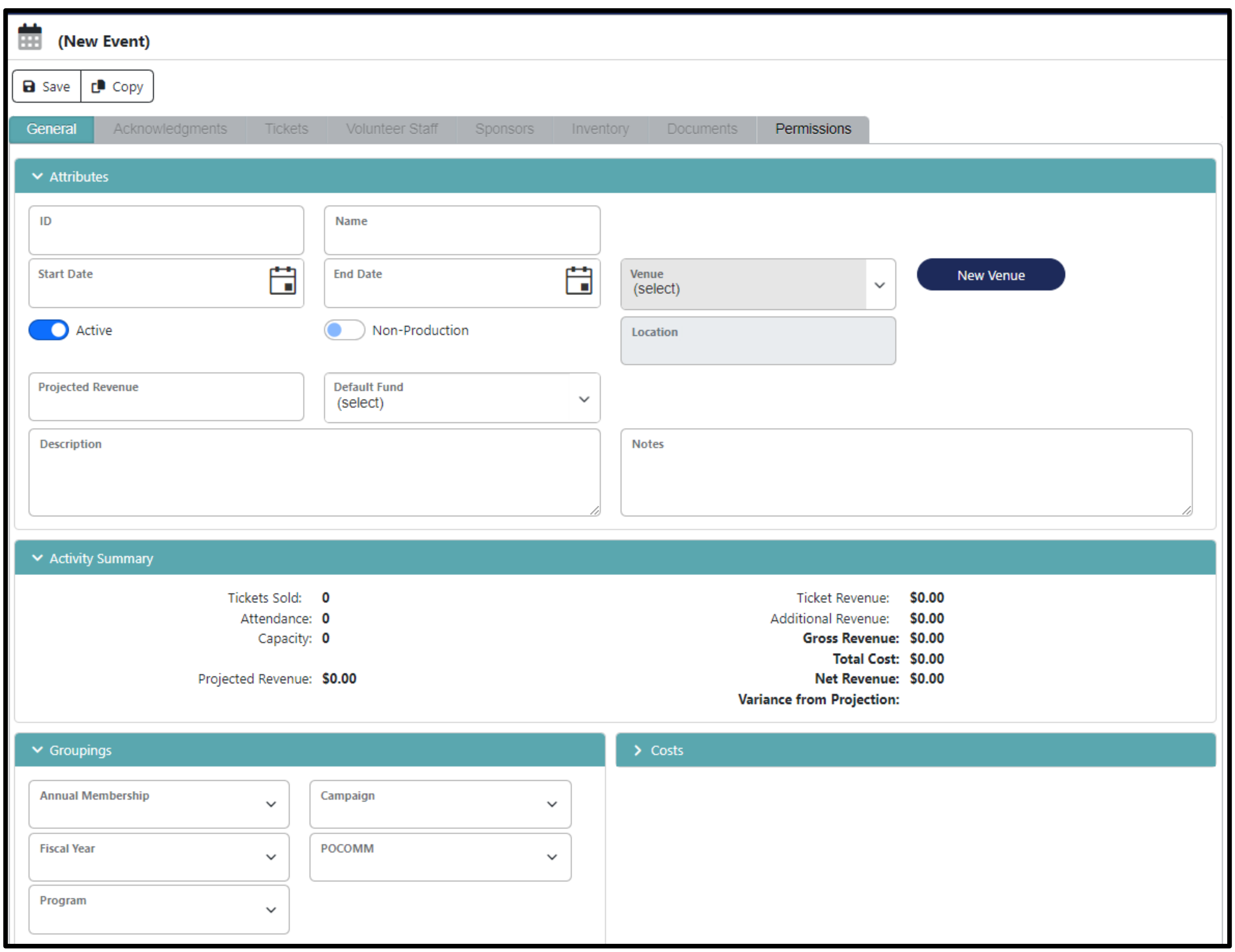
# New Events

## Creating New Event STEPS

### Generating an Event Record

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


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



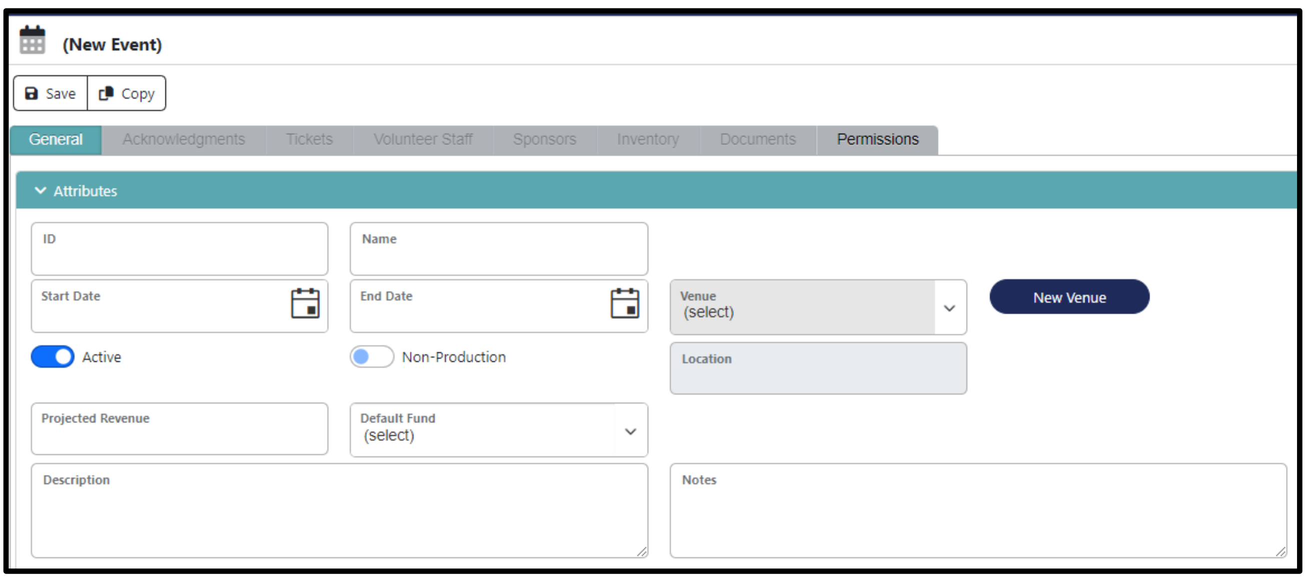
## GENERAL TAB

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 competed and saved.




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.

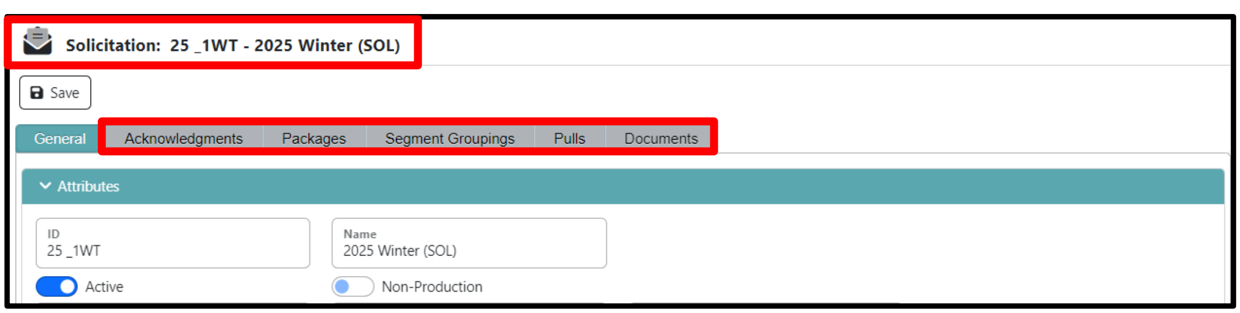
8. In the **Projected Revenue**, users can choose to enter an estimate of what the total revenue will be for sales for comparison to actual amount after the event.

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.



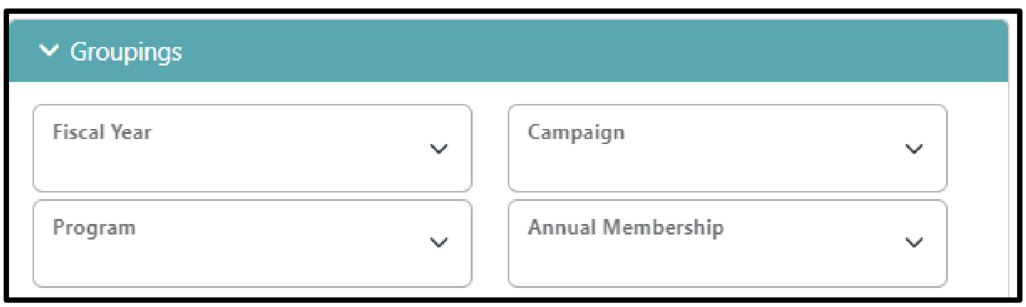

13. Observe the results of the save:
   - Remaining **Tabs** become active.
   - Appeal's **ID** and **Name** are stamped on the Record header.

## Activity Summary

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


## Groupings

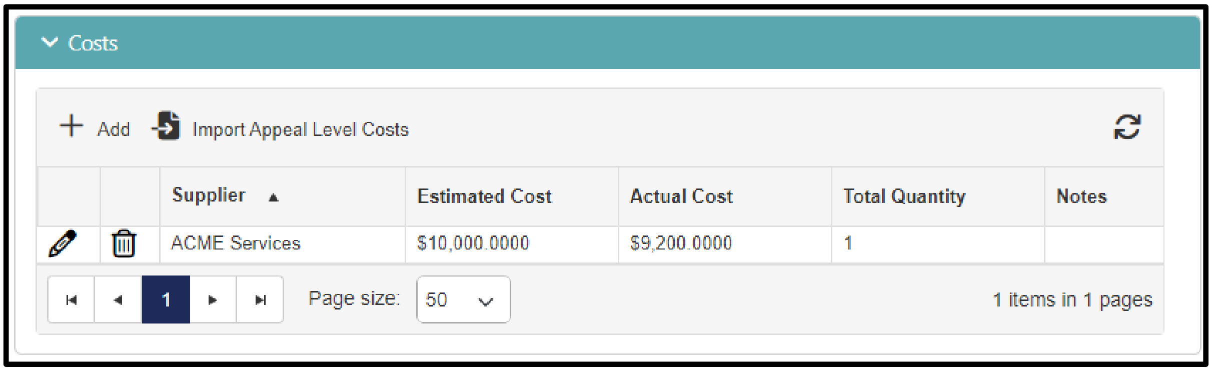
The **General** – **Groupings** section is an optional section that enables users to leverage Administrator created Groupings **Categories** and Grouping **Values** to further label an Event for more refined reporting.



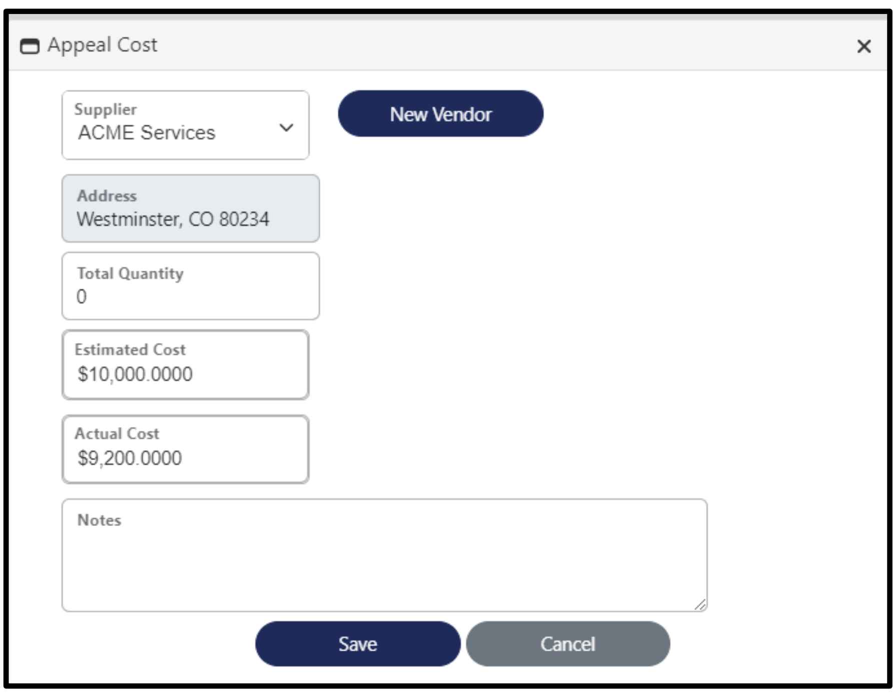
## Costs

**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.




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



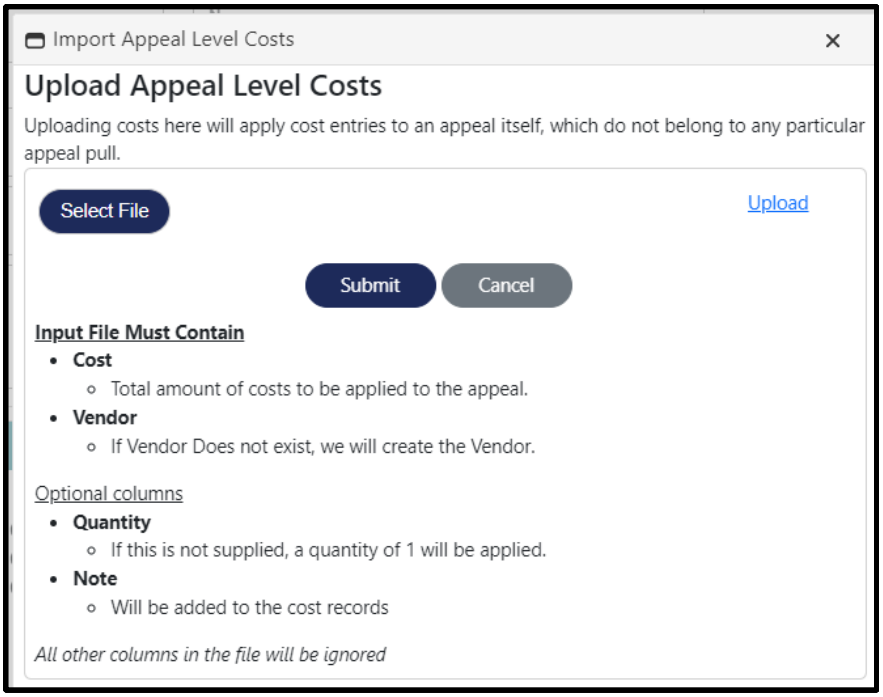

2. Select the desired **Supplier** from the dropdown menu.
    - New Vendors can be added via the New Vendor button and will be stored under the Vendors module.

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.



## 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.

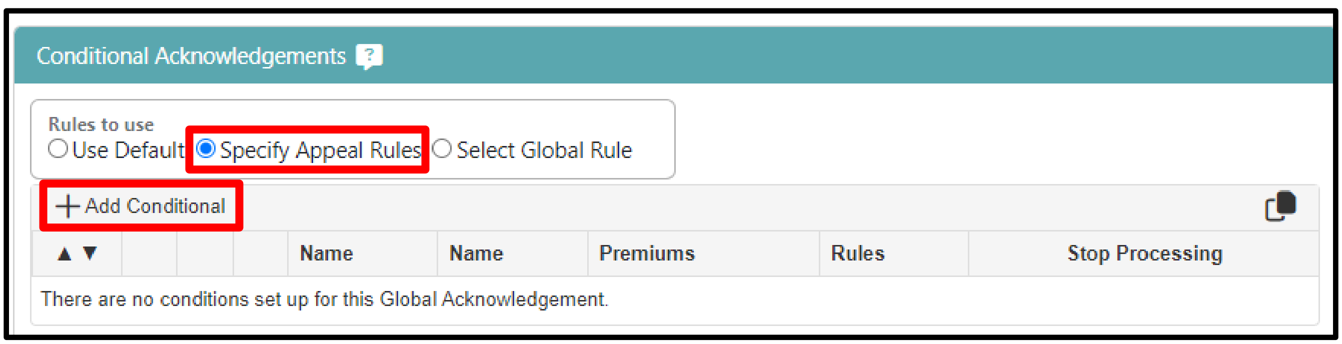
The **Specify Appeal Rules** option creates unique **Conditions** and **Rules** and ties them to an existing **Acknowledgement Appeal** record. It is used specifically for Events whose Condition & Rules are NOT usually replicable.

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

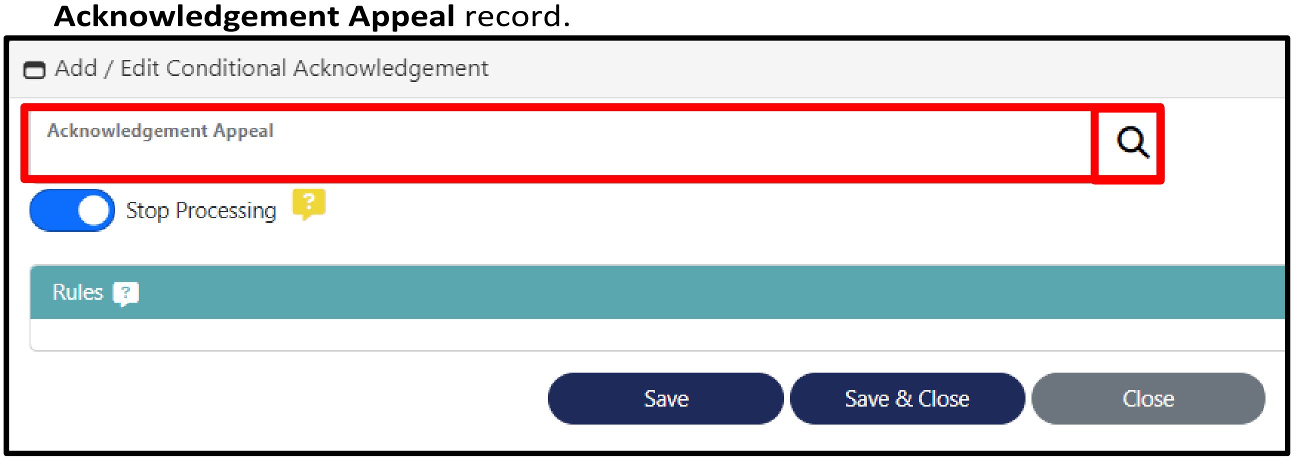
## SPECIFY APPEAL RULES RADIO BUTTON

1. Click the **Specify Appeal Rules** radio button.

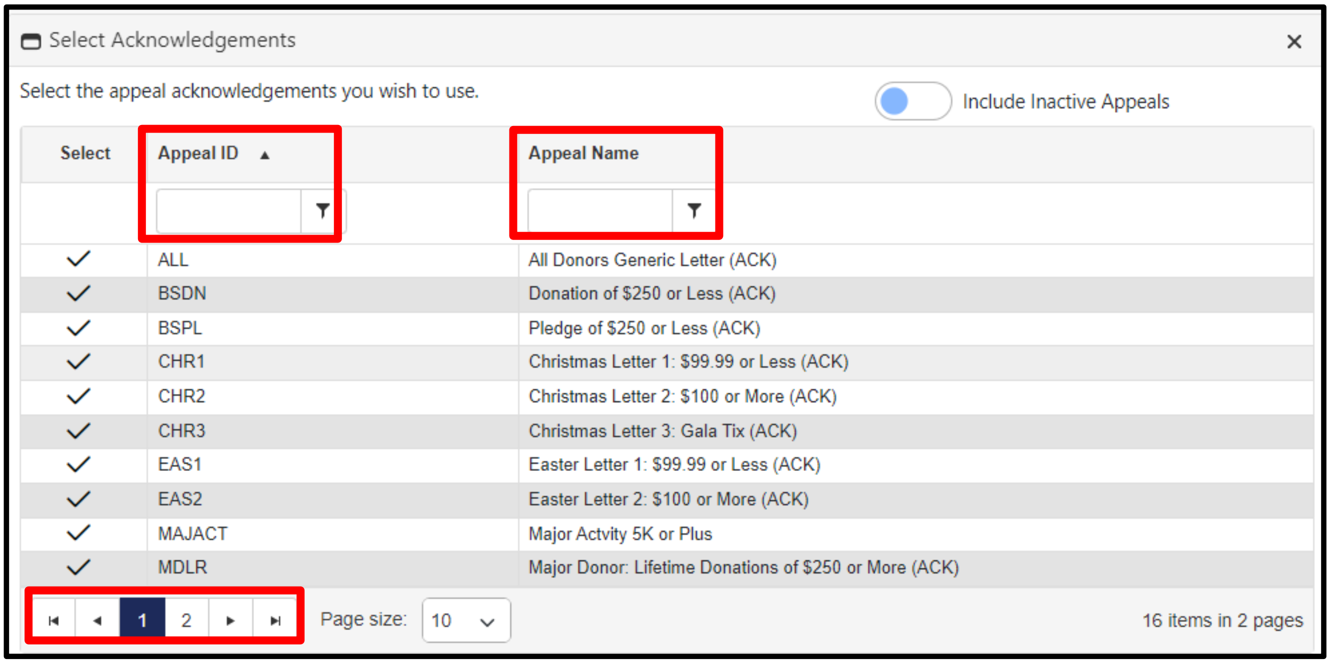
2. Click the **+Add Conditional button**.




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

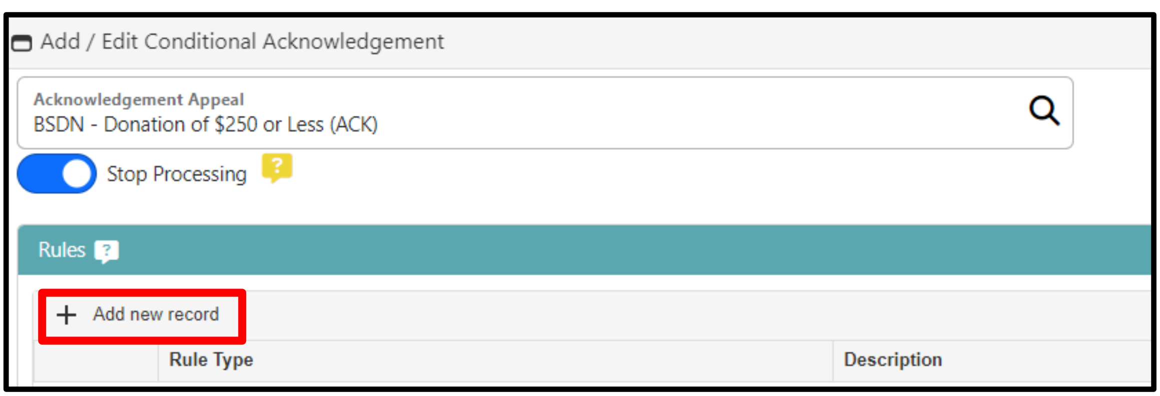


4. Alternately, click the **Lookup icon** and select the desired **Acknowledgement Appeal** from dropdown by clicking the **checkbox** from under the **Select** column.
    - User can also scroll pages or filter results by **Appeal ID** or **Appeal Name**.




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

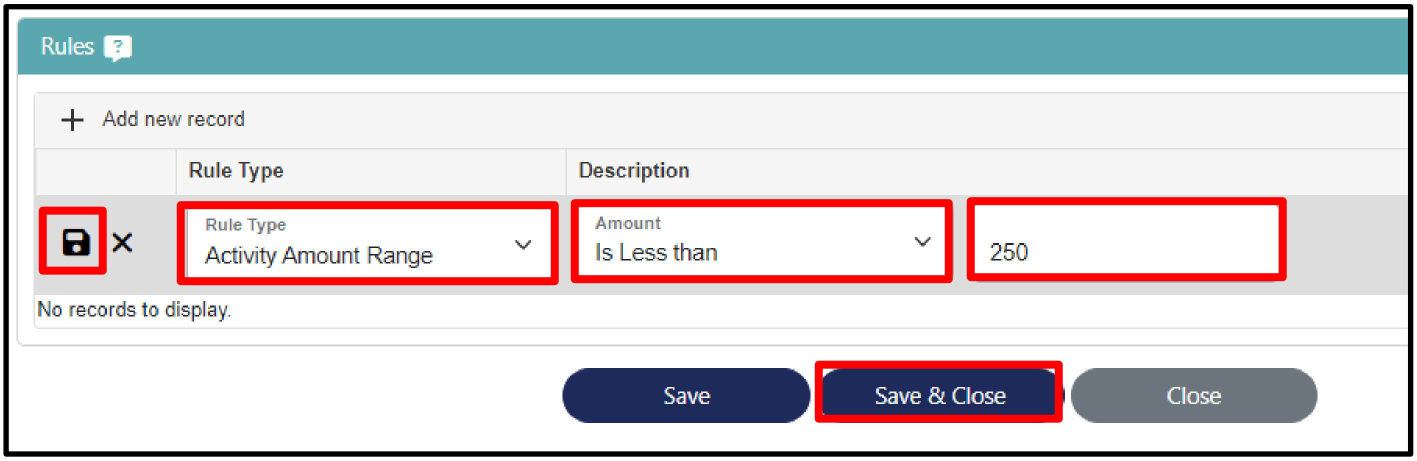

6. Click on the **+Add new record** button that displays under the **Rules** section.



7. Add a **Rule Type** of **Activity Amount Range**.

8. Add an **Amount** of **Is Less Than**.

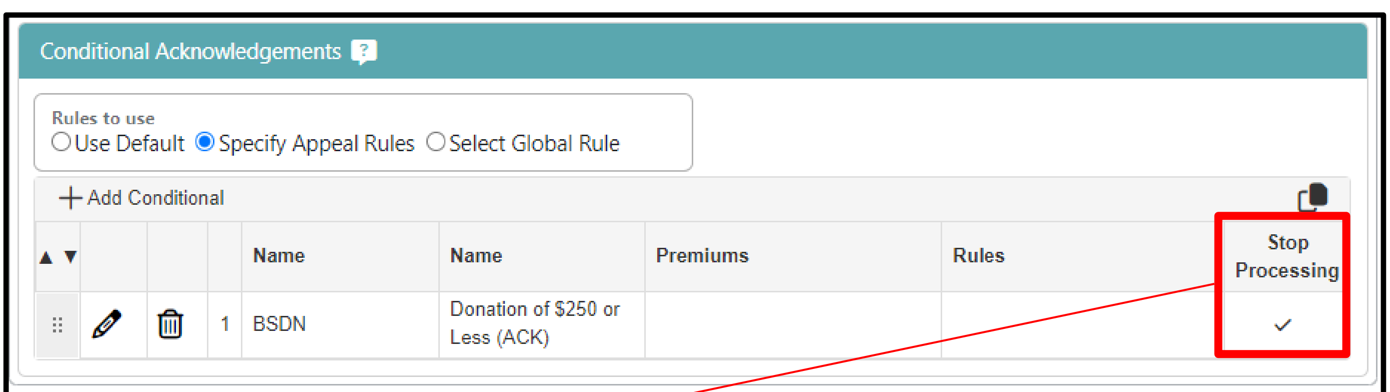
9. Add a **Value** of **250**.




10. Click the **Save <u>ICON</u>** 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.




**Stop Processing** feature is sometimes <u>UNCHECKED</u> 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.

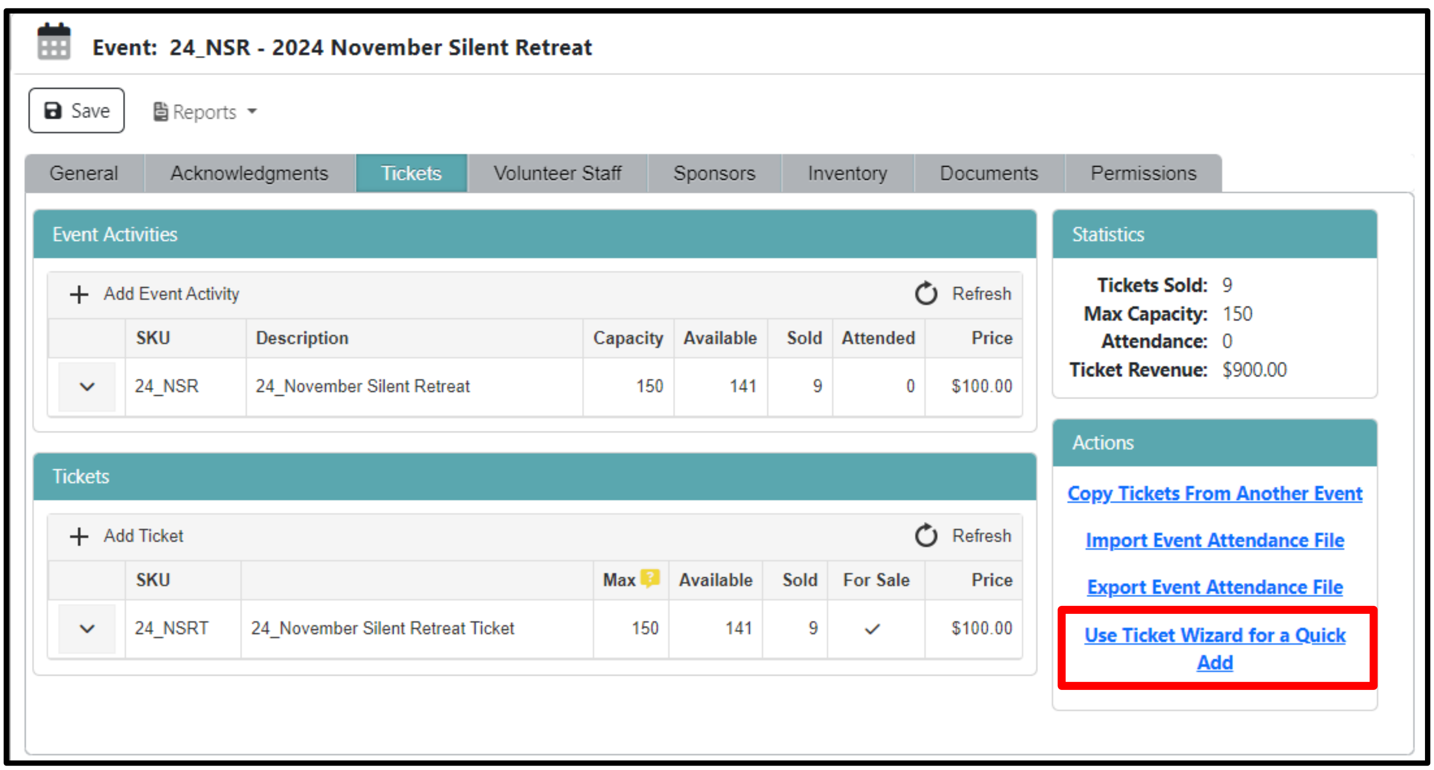
### Adding Tickets NOTES – READ FIRST

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**.

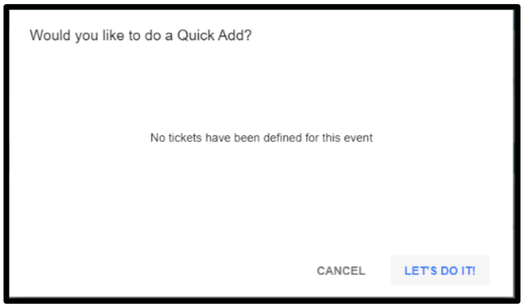
It is extremely important that users **ALWAYS** use the wizard when adding tickets to an Event – New or Existing – as this sets up the ticket correctly for Aegis Inventory and processing.



## 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.

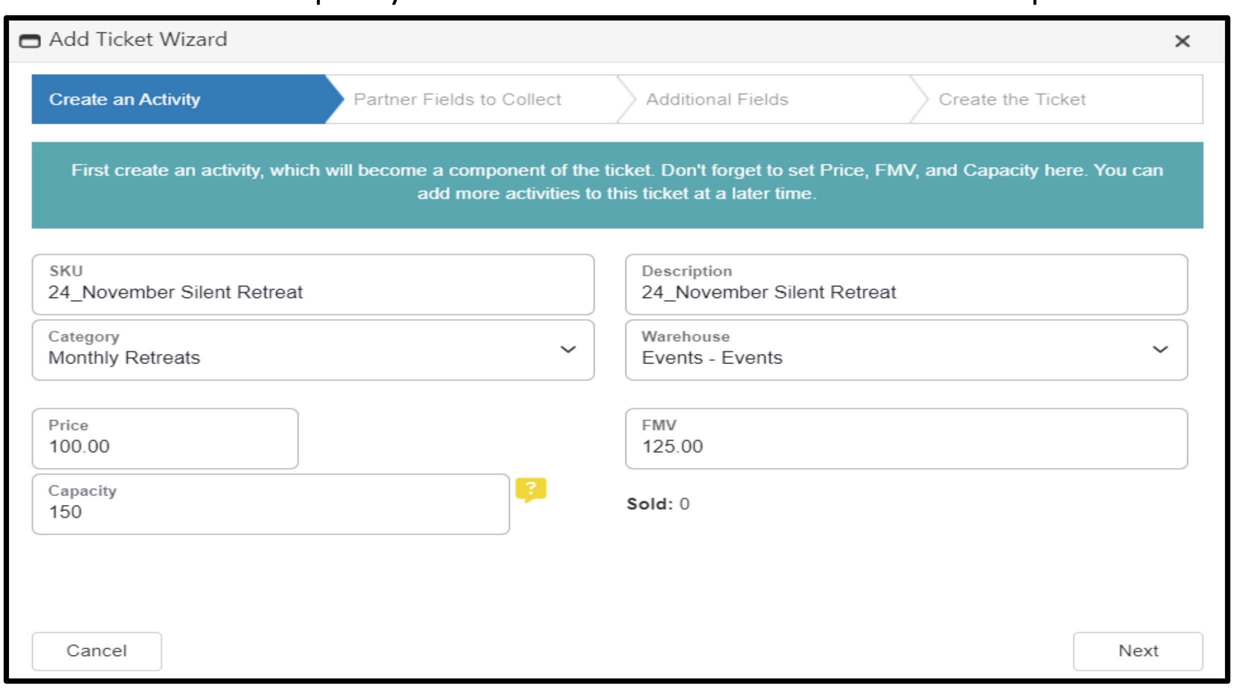
5. From the **Category** dropdown select desired Inventory folder to store the Ticket.

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.

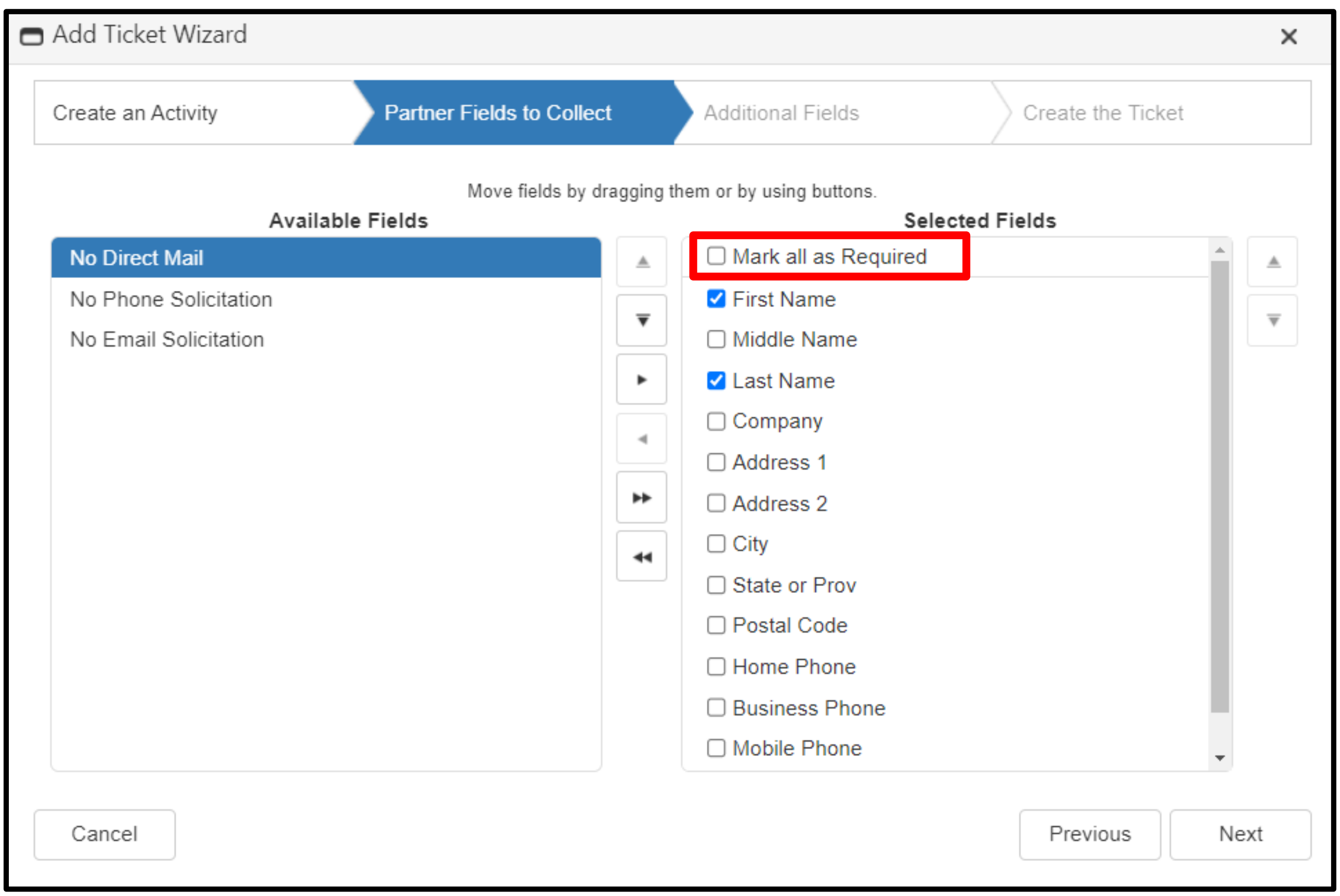


10. Click the **Next** button.

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.



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.

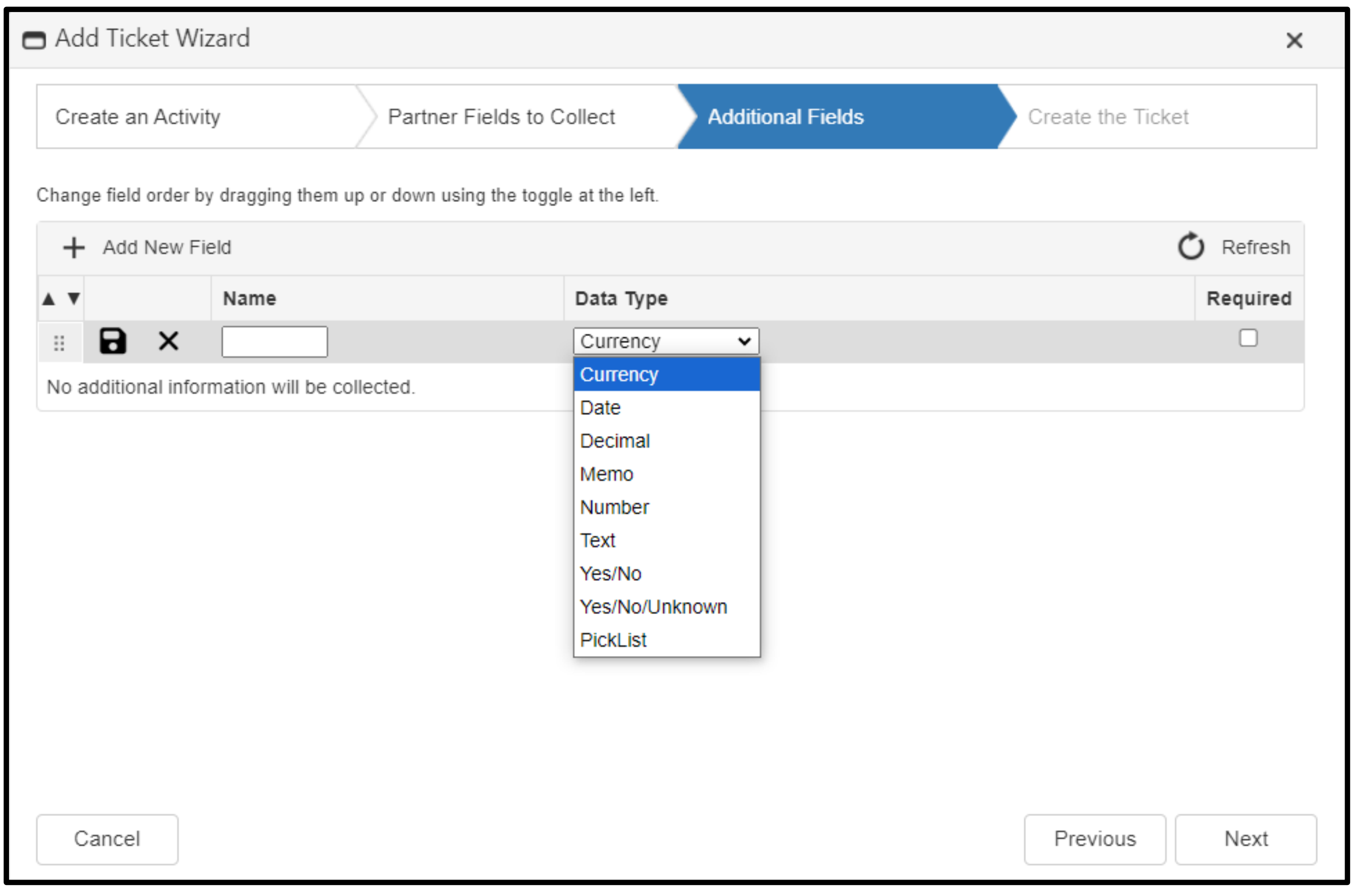
16. Click **+ Add New** Field.

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

18. Select the **Data Type**.

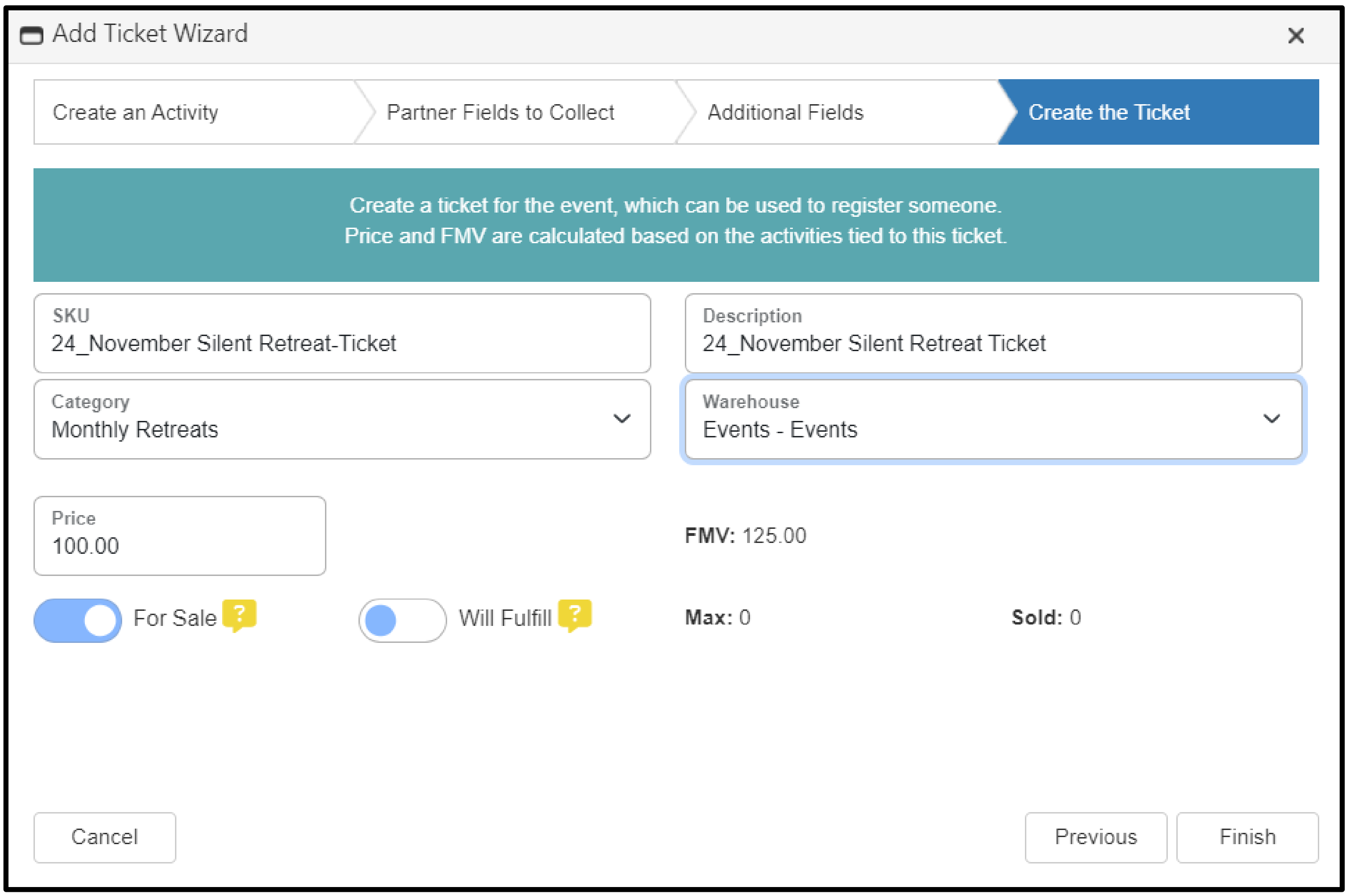
    - IF needed, Administrators can define additional Pick List values in the Administration module>Pick Lists folder.

19. Click **Insert**.



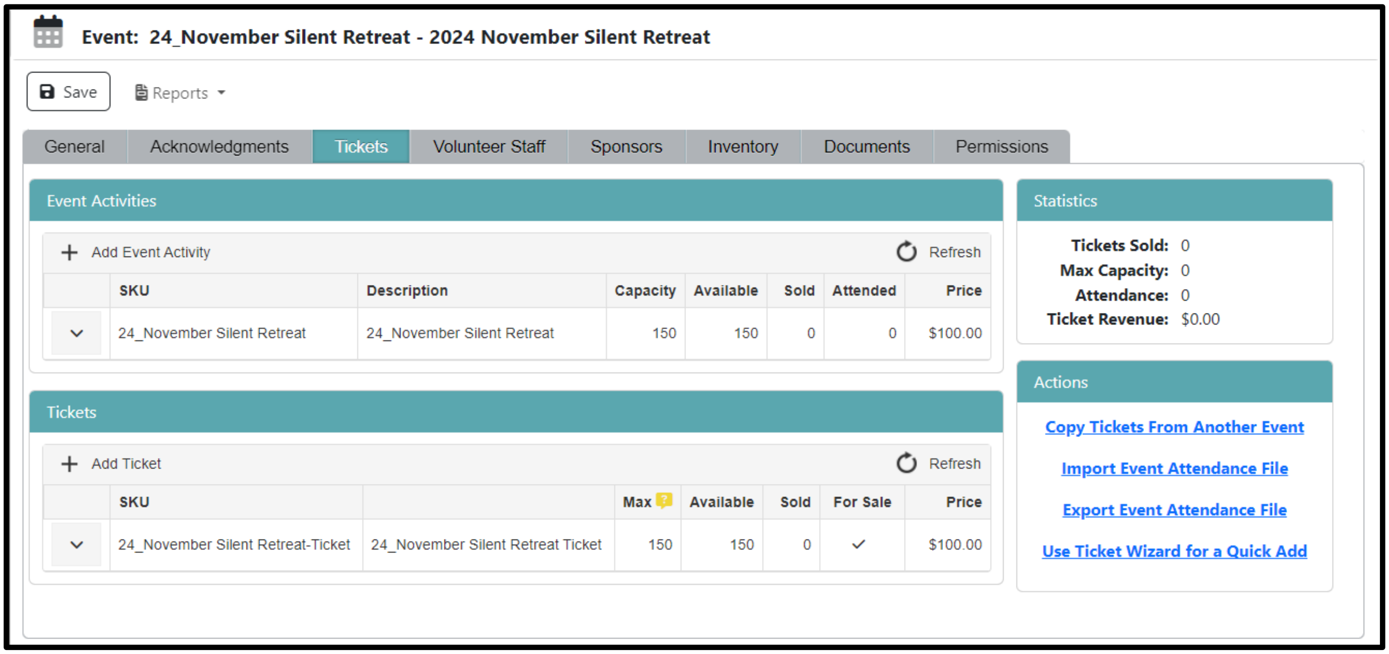

20. Click the **Next** button.

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.




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

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




## 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

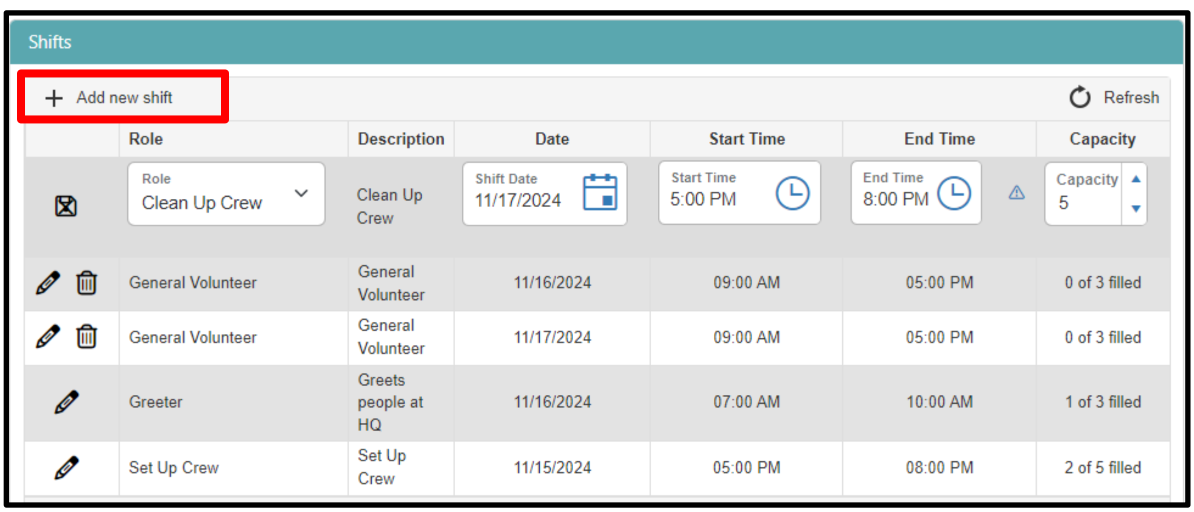
1. Click on the **Add new shift** button.

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.

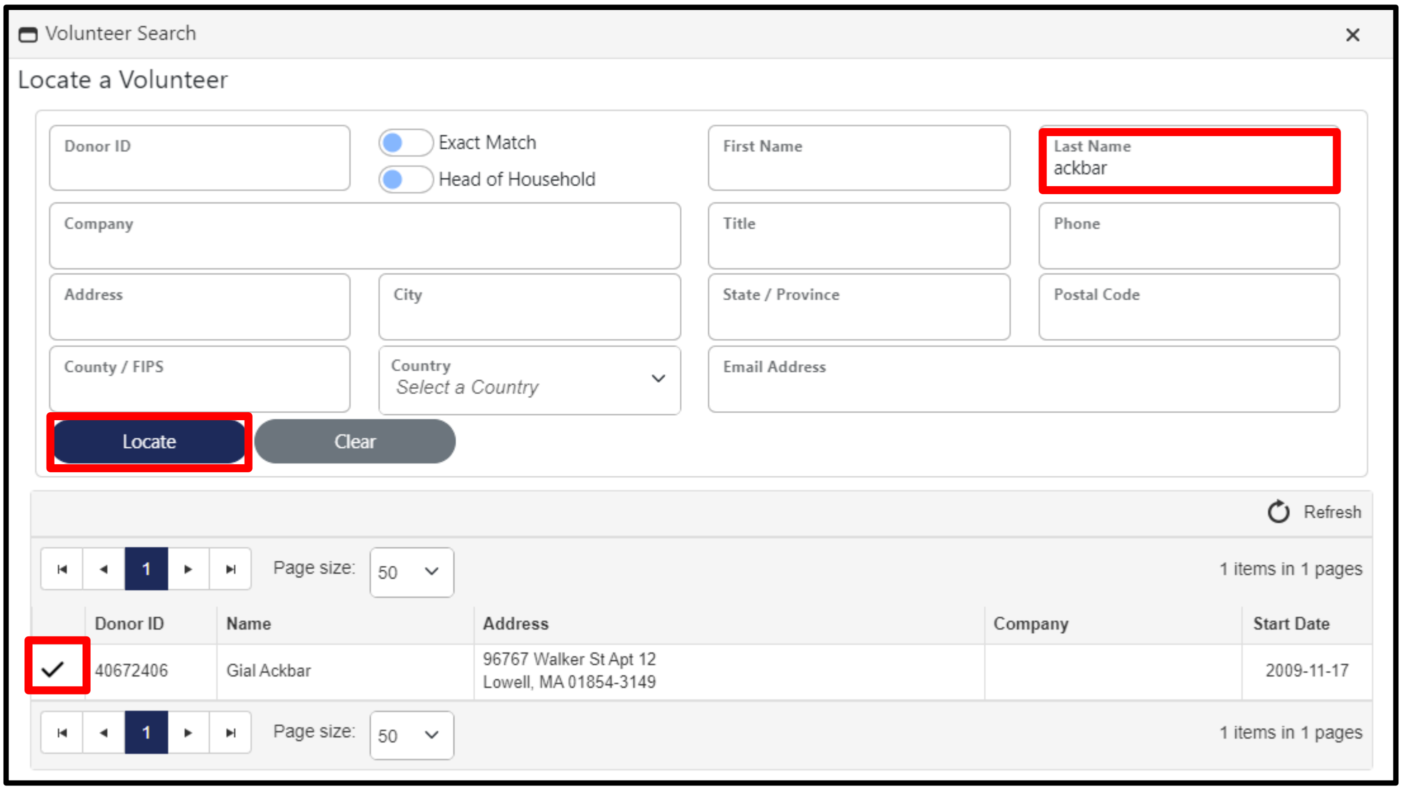



6. Click the **Save** button to the right of the newly created Role.

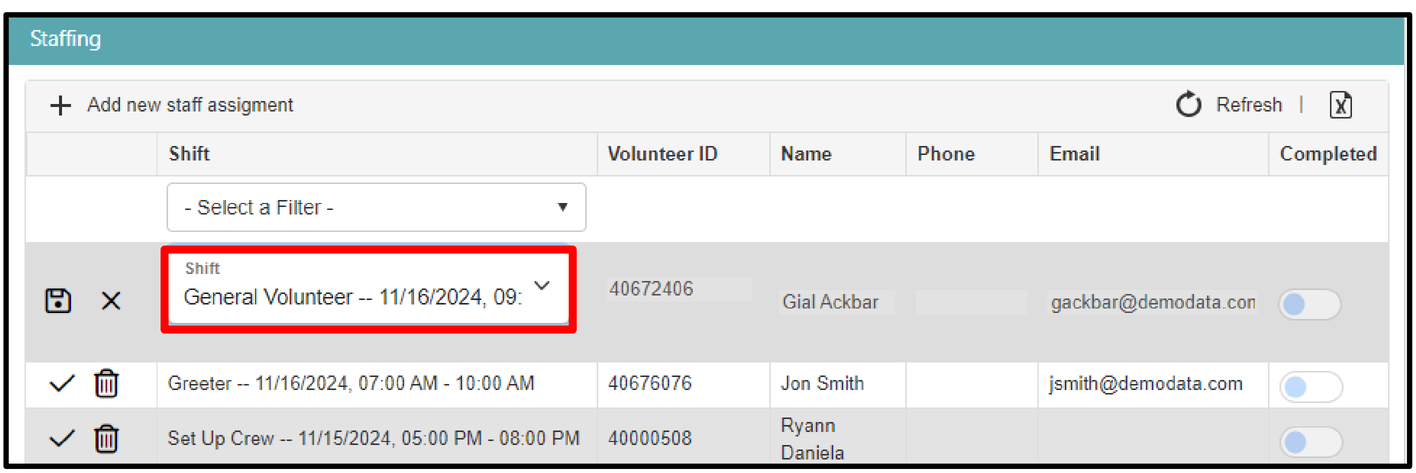
## Creating Staff Assignments

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.

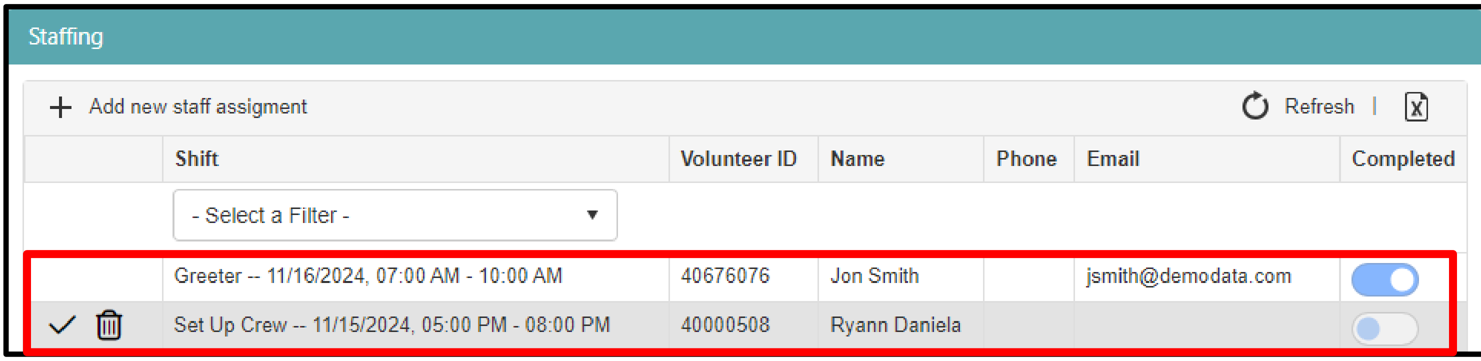



3. From the new **Staff Assignment**, click on the **Shift** dropdown and select the desired value to assign to the **Volunteer**.




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.



## SPONSORS TAB

The Sponors 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.

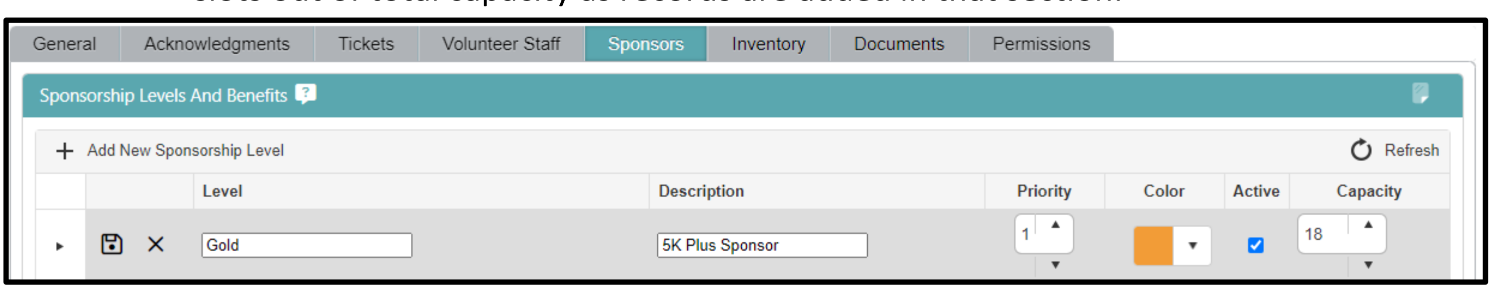
3. Enter a description for the level in the **Description** field.

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.

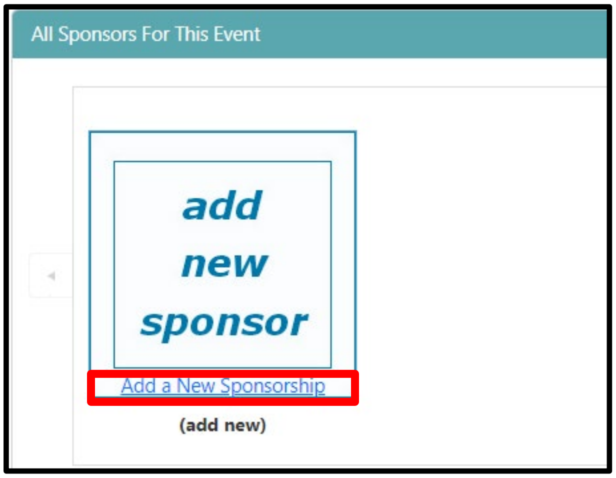
7. Select the desired capacity number from the **Capacity** dropdown.
    - The Capacity Number will map against how many Sponsors are added from the **All Sponsors For This Event** section and will update how many slots out of total capacity as records are added in that section.



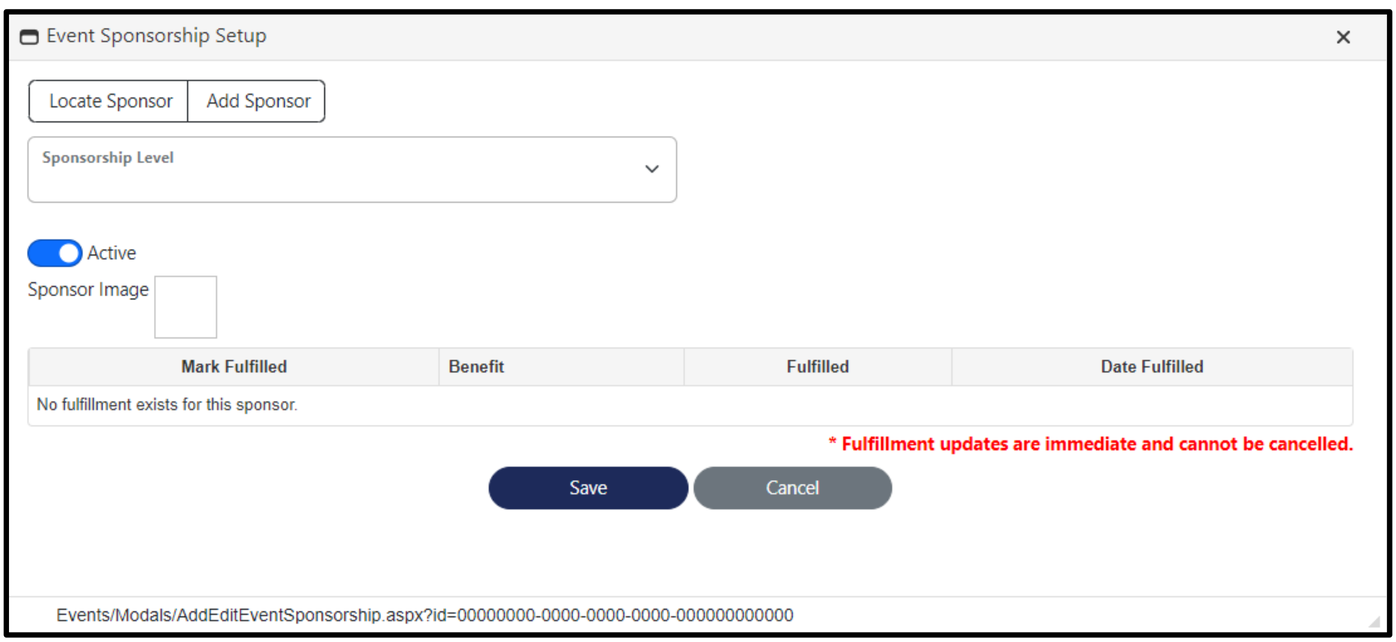

8. Click on the **Save** button to the far left of the row.

## 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.



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.

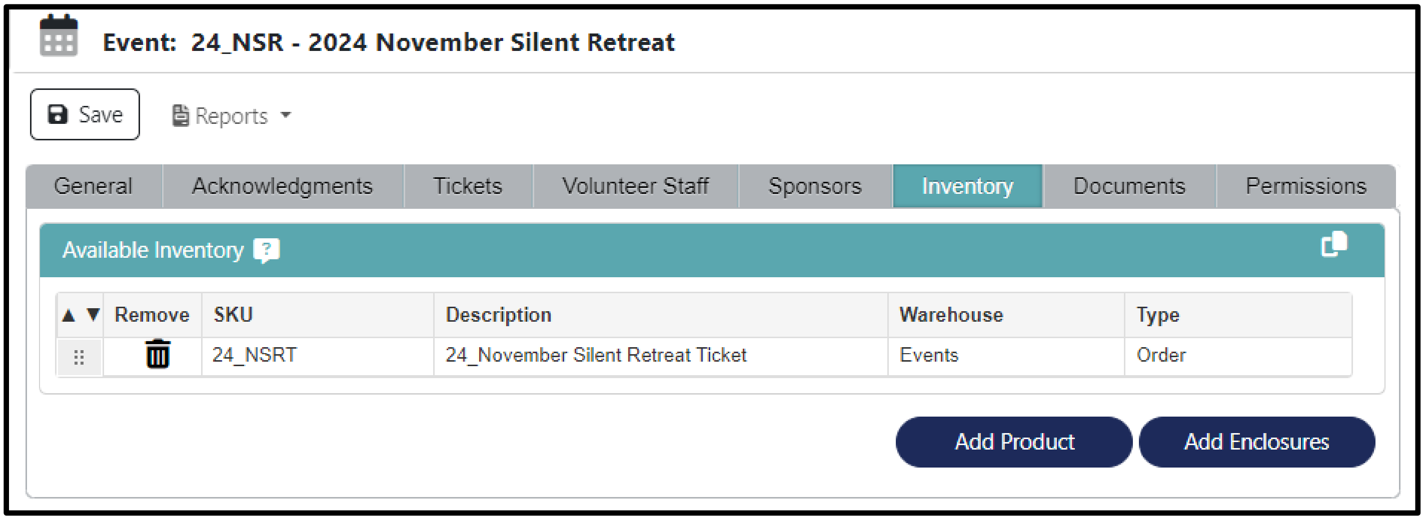
5. Users can turn off the **Active** toggle if desired.

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.




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.

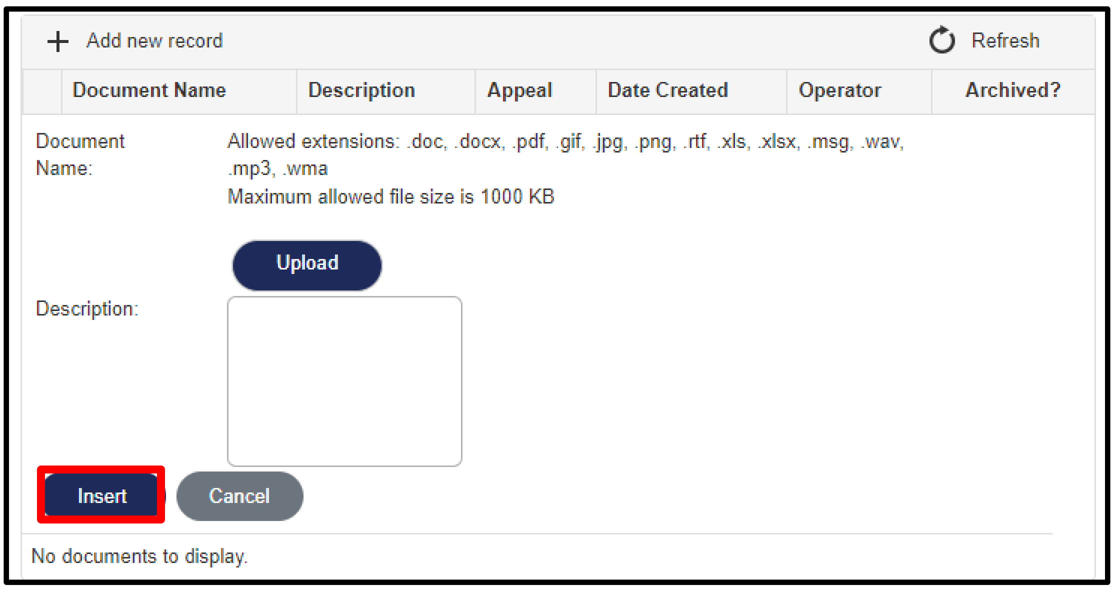
# DOCUMENTS TAB

## 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.

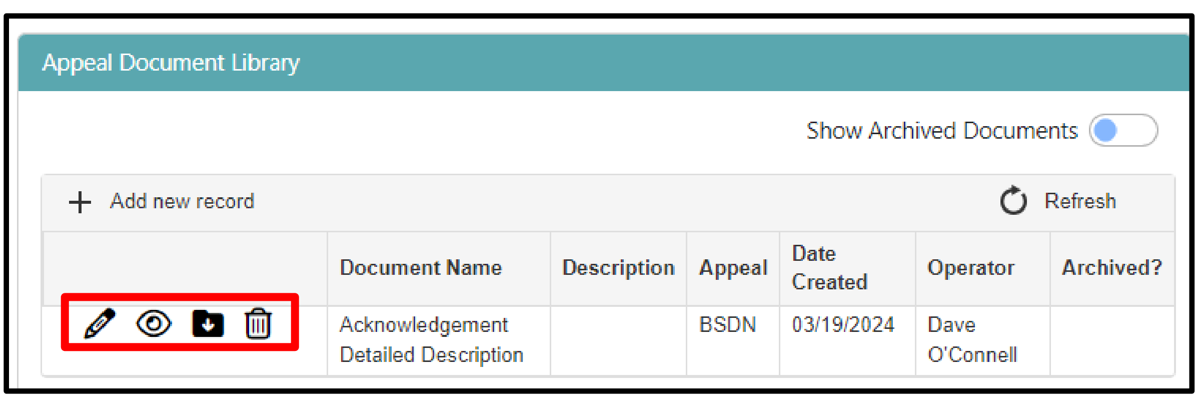
1. Click on the **+Add new record** button.

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.




3. Click on **Insert**.

4. The file displays as an entry under the **Documents** listing.




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

# PERMISSIONS TAB

## Permissions

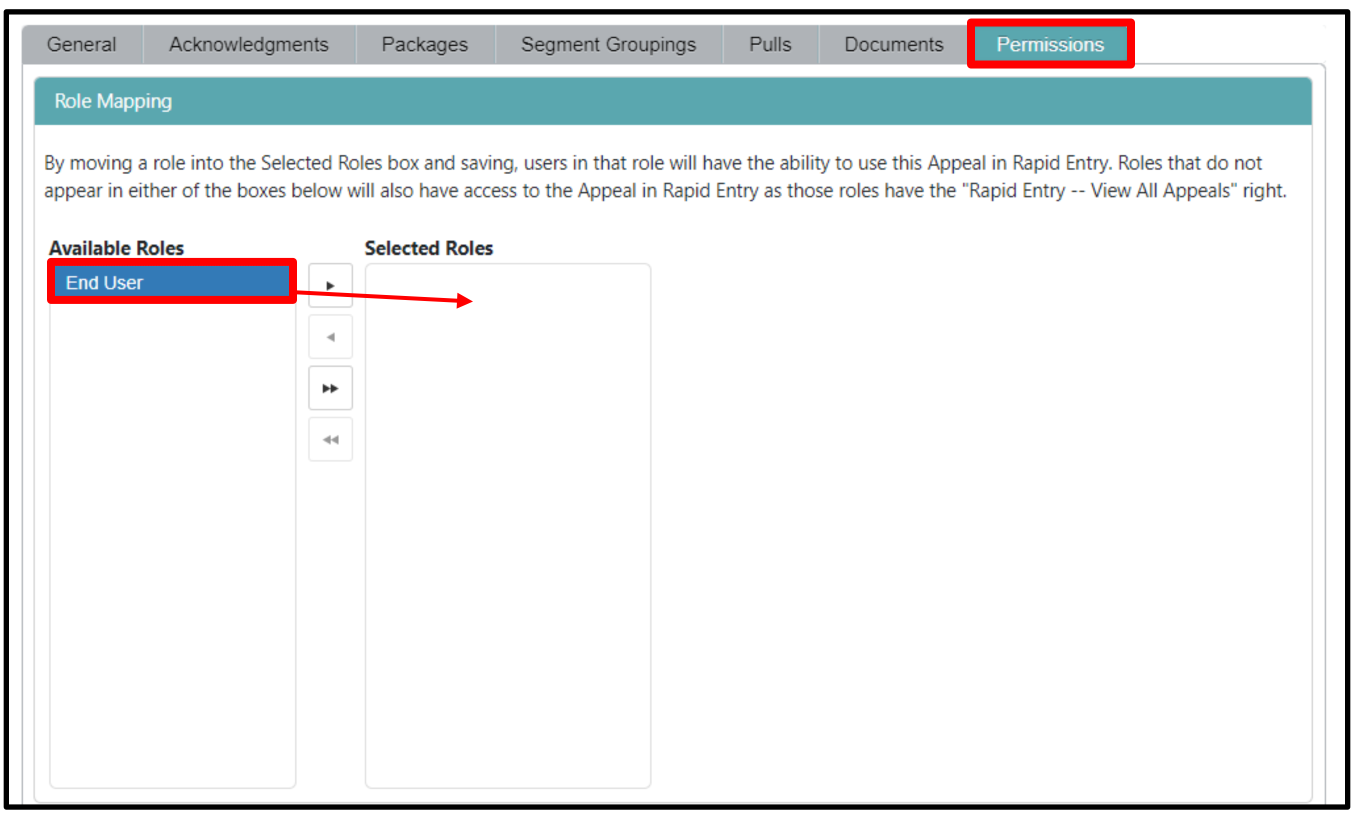
The **Permissions** tab enables users to set security by **Roles** on which users can view or not view the Appeal in **Rapid Entry**.

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 <u>Selected Rights</u> under <u>Available Rights</u>. **<u>By DEFAULT, this right resides under Selected Rights.</u>**

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.

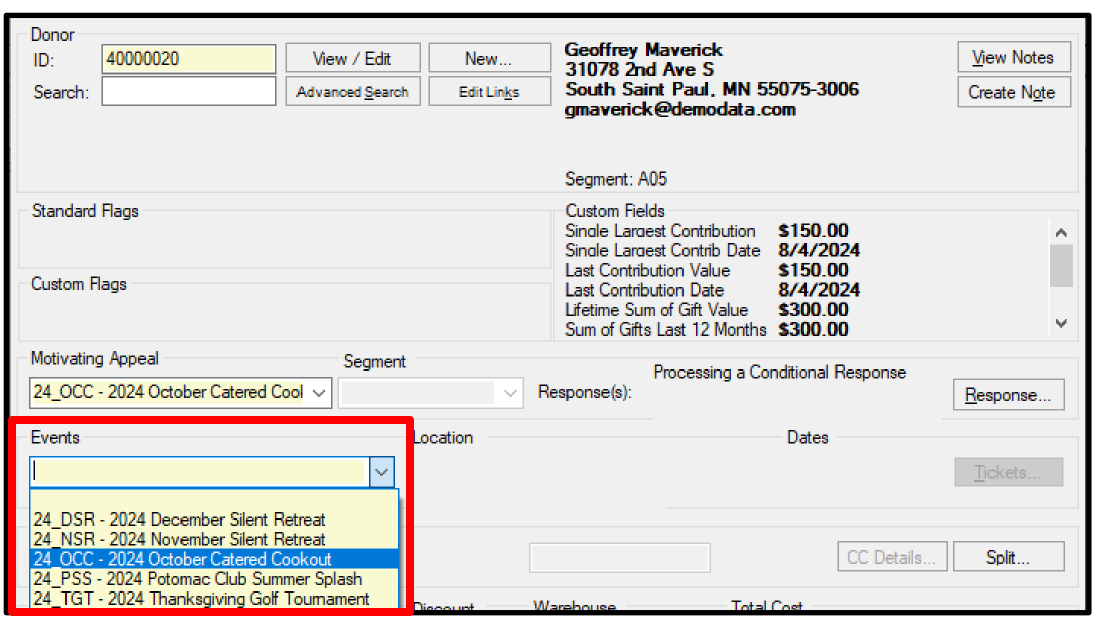
### Adding Tickets to a Batch STEPS

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.

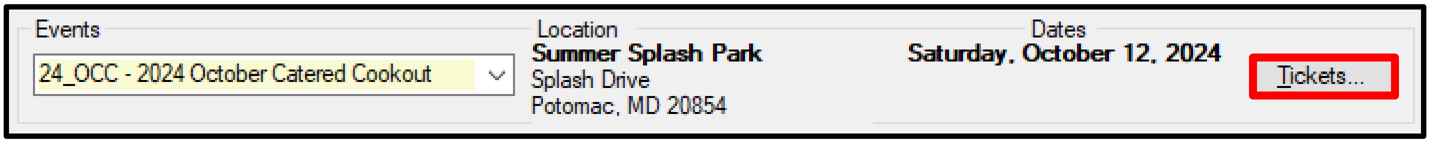
2. The **Add Transactions** page displays.

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

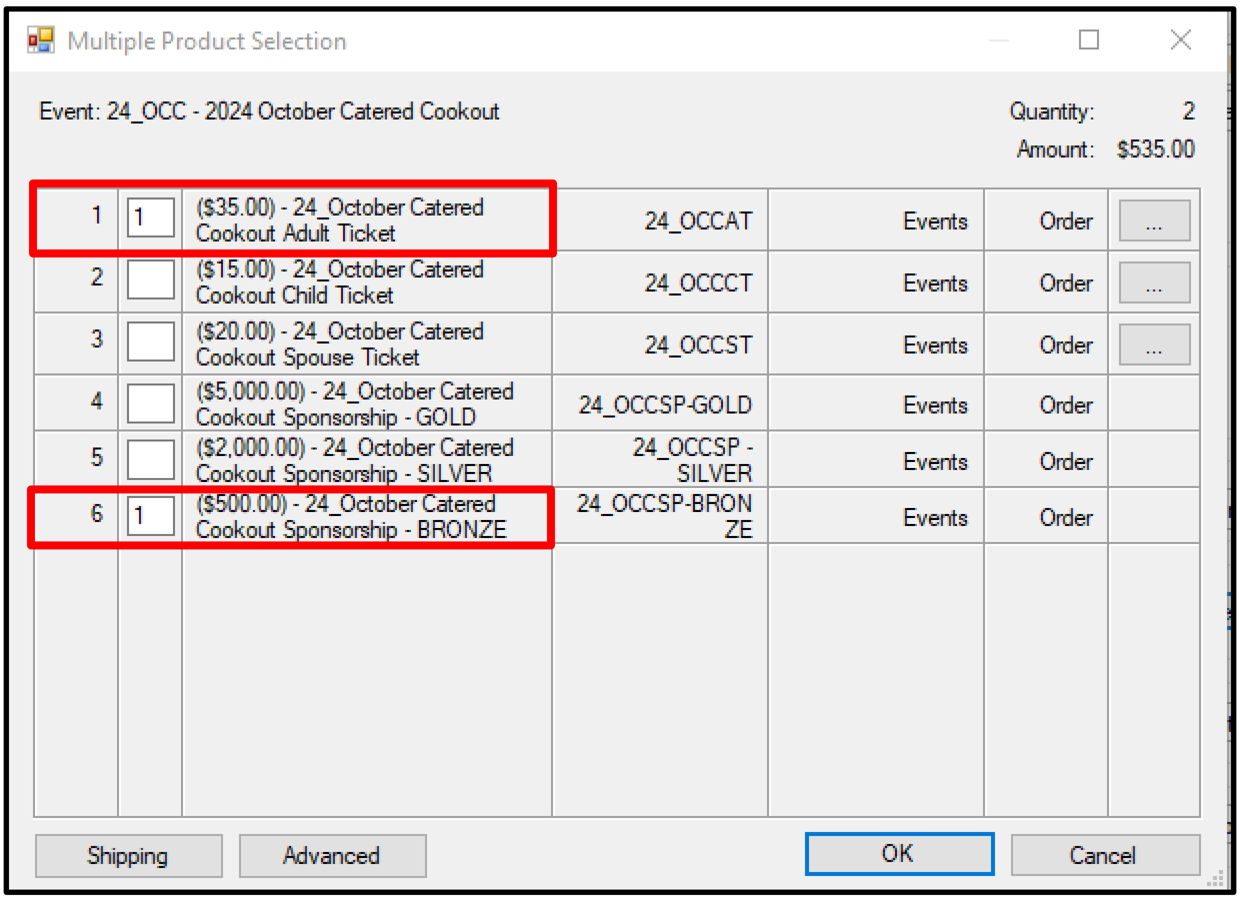


5. To the Right of the Selected **Event**, click on the **Tickets** button.




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.

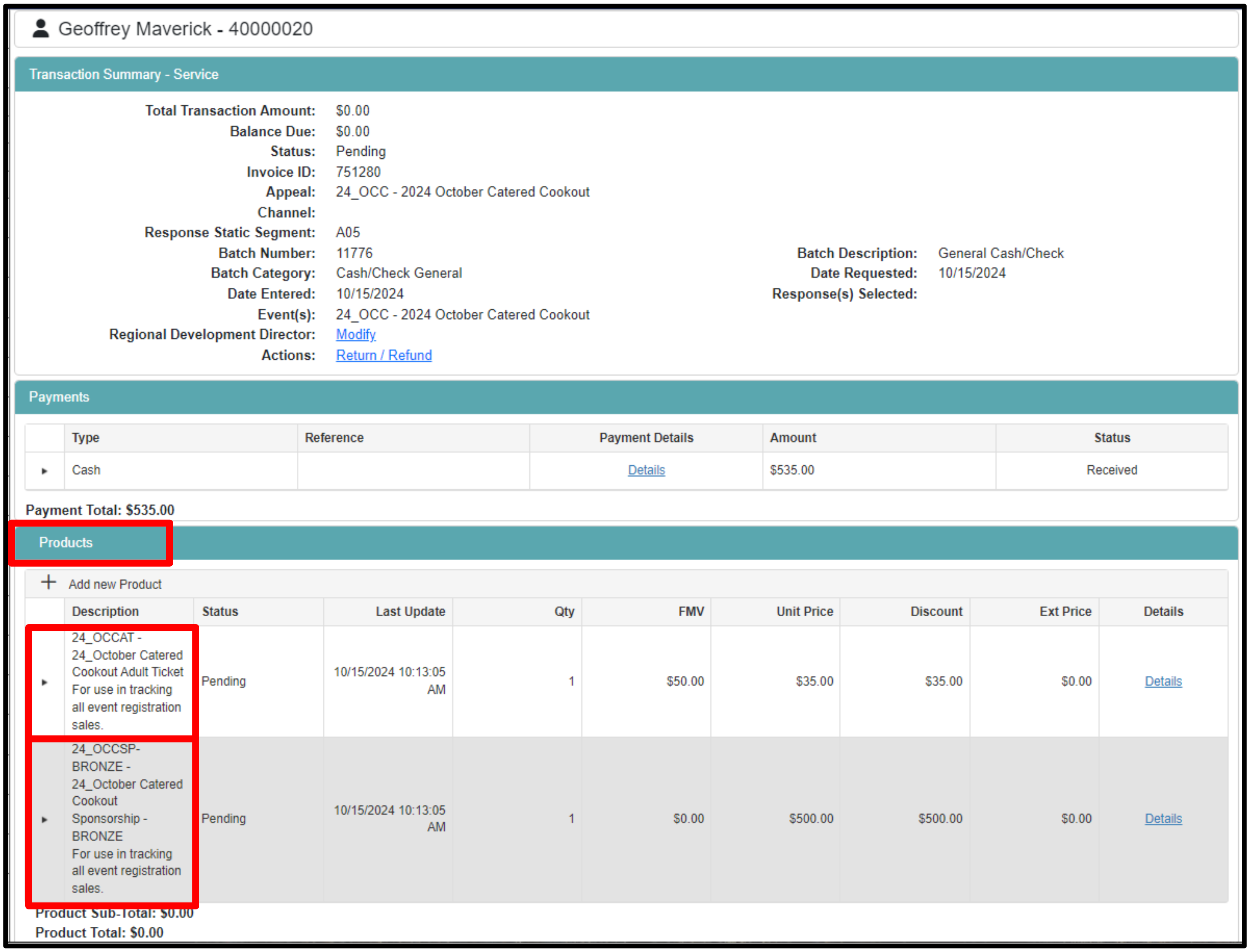



8. Click **OK** to **Save** the selections
   - NOTE: If users are collecting additional information for certain Ticket Types: Food Preference, Shirt Size, Child's Parent Email etc. they will automatically be taken into an editing screen to add that information upon savin

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 Description: | General Cash/Check |
| Batch Category: | Cash/Check General | Date Requested: | 10/15/2024 |
| Date Entered: | 10/15/2024 | Response(s) Selected: | |
| Event(s): | 24_OCC - 2024 October Catered Cookout | | |
| Regional Development Director: | Modify | | |
| Actions: | Return / Refund | | |

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.

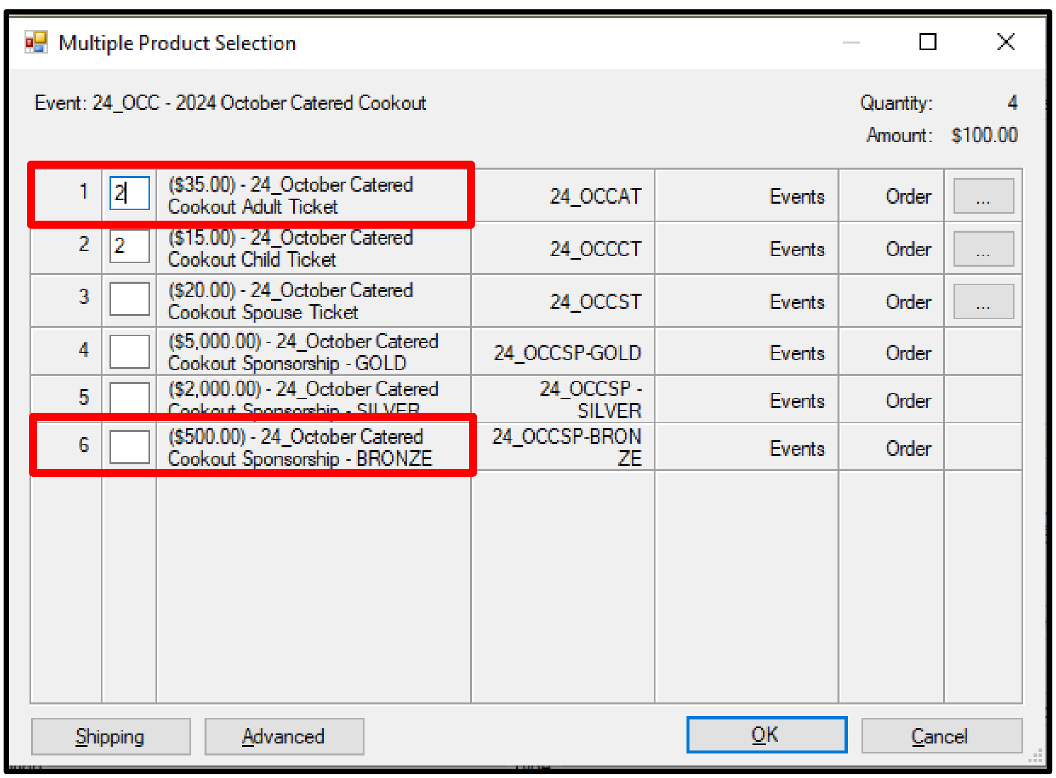
5. The **Add Transactions** page displays.

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.

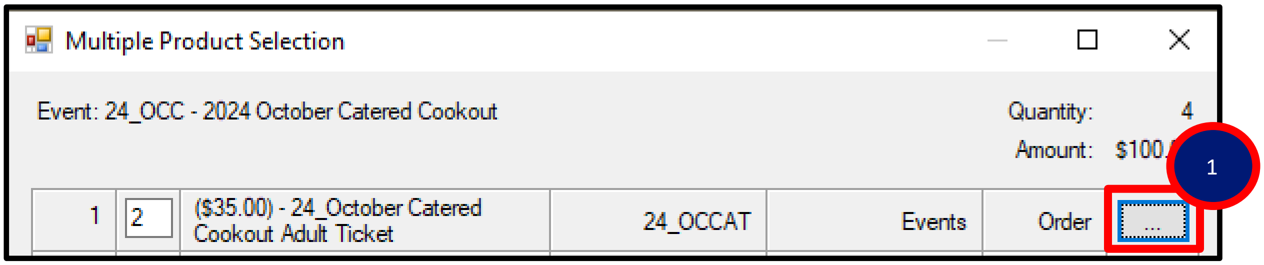
9. **Select** the targeted ticket and enter the desired **Amount** to purchase – in this example the user will select two Adult tickets and two Children's tickets.



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

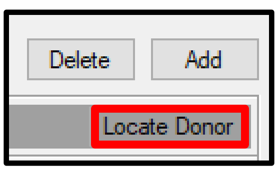
In the example:

1 The **Ellipsis** for the <u>Adult ticket</u> line is clicked opening the registrant record.

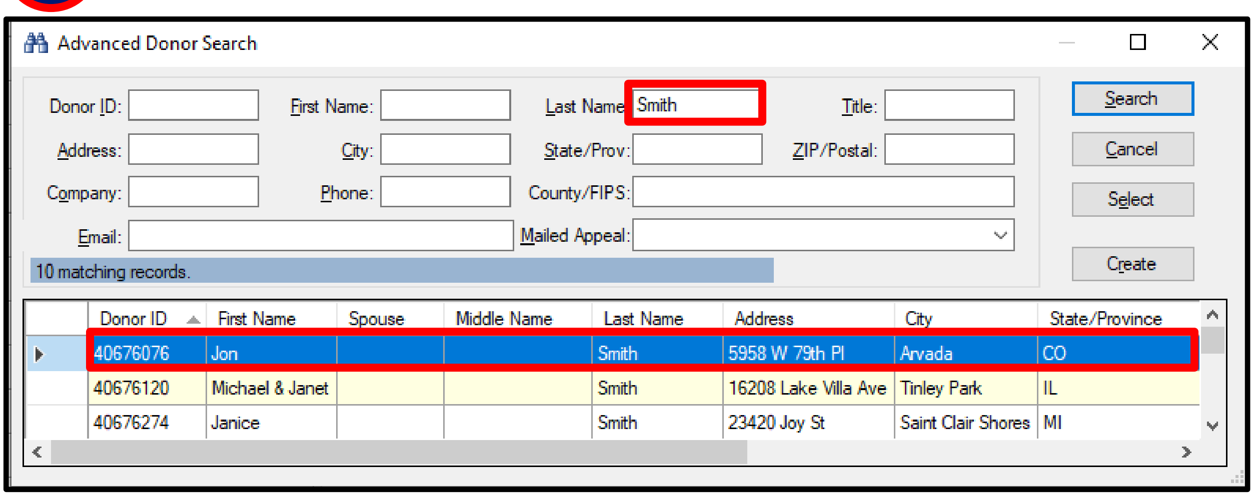



2 From the upper left of the screen, the user navigates to the second Registrant record using the **right arrow**.

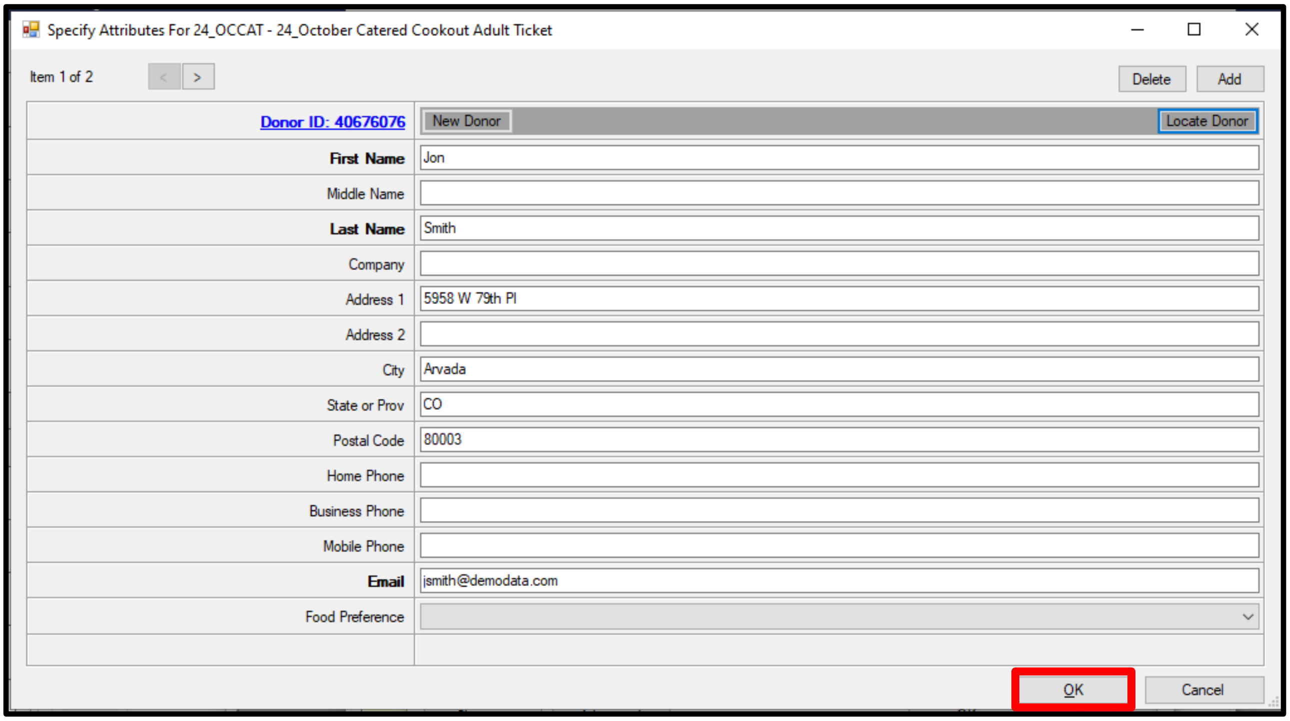

3 Once on the desired record, the user clicks the **Locate Donor** button in the upper right of the screen.



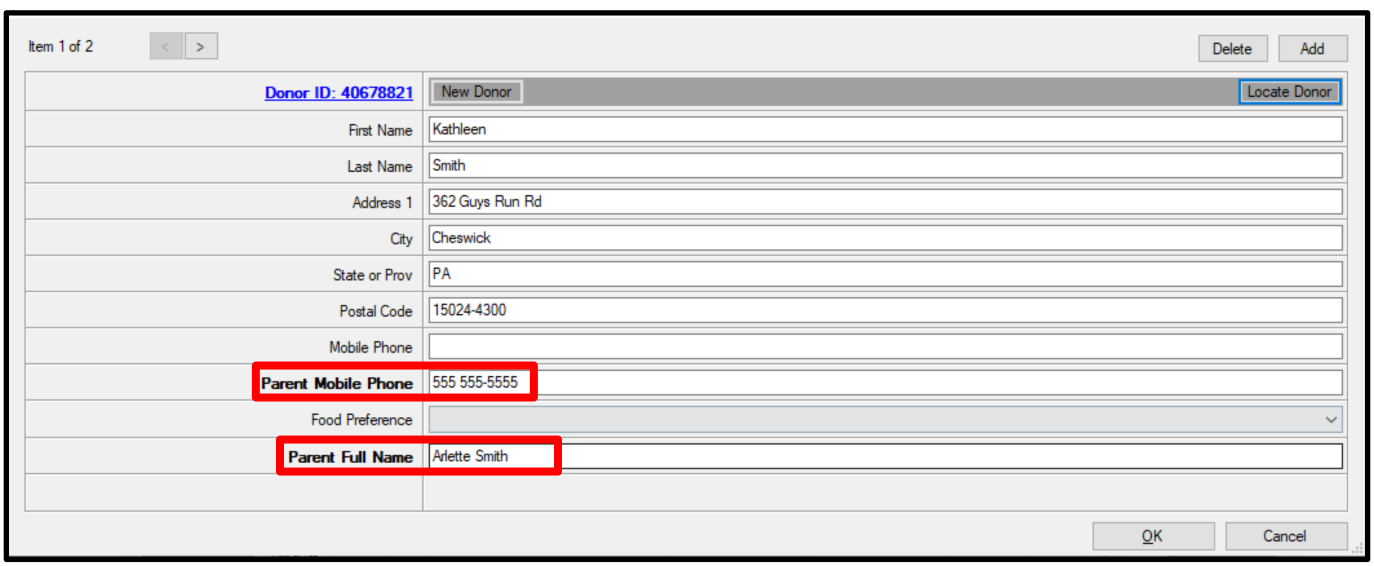

4 The user searches for and selects the desired Donor for the second registration.



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




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.




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)