

ADD AN EVENT- INSTRUCTIONAL GUIDE

EventFund is an Event Management Tool for managing your Campaign's & PAC events. What was previously an ancillary tool to our legacy **eFundConnect** software, **EventFund** has become so popular that we decided to make it a standard default on all Accounts. Now, instead of having to submit a request for EventFund access on a particular Account and wait for your logins for **EventFund**, it has been incorporated into our legacy software platform that you already use. Every Account in **eFundConnect** now has an Events button by default –and it is considered a standard feature.

Getting Started

Login to your Account and select **Events**. Under the **Current Events** section in your Dashboard, you can now add new Events. Below are 8 Simple Steps to Add An Event.

Select Add New Event

The Event Window appears and now you can begin adding the detail of your Event.

Name of Event, Description & Date Fields

Fill in the required information to identify this event and distinguish it from your other Events. This information populates onto your Current Events page & determines how the event is listed on your dashboard under Current Events.

Invite Flyer/Brochure

Upload an 8 ½ X 11" sized PDF Flyer for your Event. Keep in mind the file must be under 4 MG, which is driven by the amount of information contained on the page. If the PDF is too large, you'll get an error message at the end of this process.

Payment Options

This is where you may add prices and labels for ticket or membership sales, and the information auto populates onto the Event Donation Page that is created in this process.

Payment Options

Adding Value & Name

Value \$	<input type="text"/>	Name	<input type="text"/>
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Value Field

Use this field to enter an amount in the blank field to the right of **Value \$** (to enter \$200.00, simply enter 200).

Note: The lowest amount that you enter becomes the minimum amount accepted. Donation attempts below that amount will automatically be rejected.

Name Field

In the blank field to the right of **Name**, enter a name to the **Value** that you have added-- or leave it blank. Click into the **Name** field to label it appropriately for example: Ticket, Sponsorship Fee, Annual Membership Fee; Individual, Family, 1 Adult, 2 Persons, 1 Child, etc.

Add Payment Option

Once you have added **Value** and **Name** fields, click on the button that says **Add Payment Option**. You will see the information that you entered auto-populate up below **Payment Options**. Repeat the steps to add more Payment Options.

Note: You cannot change a **Value** or add a **Name** once the payment option has been submitted, but you can delete an item and re-enter it. To delete, simply click the **Delete** button over to the left side of the amount and you will see it disappear and you may re-enter the item. The system automatically re-orders Payment Amounts in order of amount Low to High after you make edits and save them by clicking Update Client at the bottom.

Message Windows

Donation Page Message Window

Enter the details of the Event like directions, dress code, where to park or any other special instructions that are not on your Event flier. You can use the editing Toolbar to choose color, fonts, bold, italics, underscore, bullets, numbers, centering & more. You may wish to enter a disclaimer, your ID#, FEC # or Committee Name. Sometimes it's easier to type it first on a Word document and then just cut and paste it into this field.

Note: You may find that centering is tricky and sometimes requires adding spaces, saving and taking a look to see how it actually appears on your finished page.

Thank You Message Window

You can enter a message that will auto populate onto the emailed receipt. This is a good place to state your Refund Policy or provide instructions such as: "This is your Receipt. Please print it and bring it to the Event."

Send Test email

Use this feature to send yourself a sample of the Thank You Message.

Submit

When you are satisfied, save the Event by selecting **Submit** at the bottom of the page and it will appear on your dashboard on the **Current Events** page for that **Account**, with the **Name** that you gave it.

Current Events Window – Basic Features

Go back to the **Events** button for the Account. From here you will see Current Events listed and Past Events beneath that section. To the right of any Event listed you may view the page or edit it.

View Page Button

Select **View Page**. The page will open and you can see how the details you typed into the Message Fields populated onto the form below the PDF flyer of the Event. If you want to change anything go back using the back arrow on your browser window.

Edit Button

You can edit the page, upload a new **PDF flier**, adjust or change the language in your **Message** fields. Always select **Submit** after making edits!

Sharing the URL Link to your Event

If you don't need to change anything cut and paste the URL address from your browser field, while the Event Page is open. Send the URL out in an email Blast, post it to your Facebook Page, send out in a Tweet or post it behind the 'Events' button on your Webpage. Wherever someone clicks on the URL, it directs them to your Event Page to RSVP, purchase tickets & pay for Sponsorship or Memberships.

Current Events Window – Advanced Features

Go back to the **Events** button for the Account. From here you will see your **Current Events** listed and your **Past Events** are listed beneath them. Double click the Event name and the **Edit Campaign** Page appears.

Edit Campaign

This is where to go if you need to delete an Event or use our more Advanced Features when you are having a large Event using multiple Fundraisers, and you need to keep track of their individual production.

You can also Delete a Campaign Event, View Donation Page, Edit Campaign, or Duplicate it.

Delete Campaign

[View Donation Page](#) [Edit Campaign](#) [Duplicate Campaign](#)

While deleting, viewing and editing are self-explanatory, duplicating an Event or 'Campaign' is not.

Duplicate Campaign

Campaigns that are hosting a large event with many Fundraisers helping them may require this feature. Duplicating is helpful if you have more than one Fundraiser taking money at a big Event, and you want to know who is collecting what and track how much money each individual Fundraiser produces.

By duplicating a Campaign you can create more than one identical version of the same Event Page, but they will have different URLs that distinguish them apart. If you give an individual Fundraiser their own URL to distribute, you can track their production.

When duplicating a Campaign you can edit the description fields so you can easily distinguish them apart. Under **Current Events** you will see all versions of the main **Event** that you created, differentiated by the Fundraiser's name or a number that you gave them to tell them apart.

When Editing the Events or "Campaign", you may wish to add language to the Thank you fields containing an individual Fundraiser's name, in order to personalize it.

Card Reader

To raise even more money for your organization at an Event, if you plan to have people on site accepting donations, please refer to our instructional guide for the **eFundSwiper** and learn how to easily download our **Mobile App** and pull up the right eFundConnect/EventFund Account. It is best to test the App on your mobile phone several days prior to an Event and make sure you and the Fundraisers know how to use the App and find their Event by the name you gave it.

Note:

1. **Employer/Occupation** – These are standard default fields on a donation page. If you wish them to be omitted on an Event Page, we control feature on our end so you cannot currently edit it. Please send us an email and we will be happy to change it. In the future you may have access to edit it. Be aware that if it is omitted, the required data needed for reporting purposes may not be collected.
2. **Banner/Page Header** –A Banner that represents your Account may be added at the top of all your Event Pages. You cannot customize the Header for a particular event because the Header is intended to represent the Organization that opened the Account and is hosting the Event. Headers for Event Pages must be 900 pixels wide and 150 pixels tall.
3. **To Add Event Page Headers** - To add a standard Event Header you must be either a Treasurer or a Consultant. (Fundraisers and Web Editors do not have user permissions to add or edit headers.) Select Account and scroll down to the section entitled Standard Donation Page Header and below it there is an Event Page Header field. Here one may upload a Banner specifically for the top of all Events hosted by an Account. Alternately you may leave it off, but users will see a blank area at the top of the Event page that is place-marked for this purpose.