



## Event Features

There are several new features and functionalities in Julep 3's **Events Module** that allow users to manage their events and invitees easier as well as complete tasks at the actual event such as process credit cards and check invitees in.

To learn more about the **Event Dashboard**, see the **Julep – Event Dashboard** guide on our HelpDesk. Also, to learn more about the new search features and quick searches, see the **Julep –Search Features** and **Julep – Quick Searches** guides on our HelpDesk.

### Edit Event

- Once you have opened an existing event via the **Event Search** or the **Event Dashboard**, you can view and edit the event's details under the **Edit** tab. Please note, the 3 required fields for events are **Event Code**, **Description**, and **Start Date**.
- In order to have the summary information in the top blue bar be calculated for an event such as **Goal**, **Raised**, **Net**, **First Gift**, **Last Gift**, and **Outstanding Pledges**, at least one **Source Code** needs to be linked to the event.
- To add and link a new source code to an event, click the **+ Add Source Code** button. If you want to link an existing source code to this event, you'll want to go to **Money Settings** to do that.

### Ticketing

- When you check the **Enable Ticketing** checkbox in the **Edit** tab, you can then create different **Ticket Descriptions** with **Participation Levels** or amounts by clicking the **+** button.

- Once you have created tickets, they can then be assigned to **Invitees** when you **Process \$** so that the number of tickets per attendee can be tracked. The number of tickets an attendee has been assigned can be viewed in the record's **Edit Event Participation** page. Please note, that tickets can be assigned under **Process \$** whether the donor decides to **Pay Now (CC)** or **Pay Later (Pledge)**.

Edit Event Participation

Mr. Acosta, Sr. (1778899) 2/1/21 - EVPAN21 - Pancake Breakfast 2021

**Edit** Questions Payments Guests

2 General Admission Tickets Process \$ Check In

Status: Invited

RSVP:

Comment: Created by Event Import Module: 04/24/2020 13:36:09.204

Table #:

Invitee Type:

## Invitees

EVPAN21-Pancake Breakfast 2021

**Edit** **Invitees** Questions Attachments Map Briefing

Mobile Version Import Invitees + Add Invitee

Change Status:  Check In:  Search Invitees and Guests:




Update Selected

Status:  Type:  Checked In:  FTD Greater Than/Equal To:

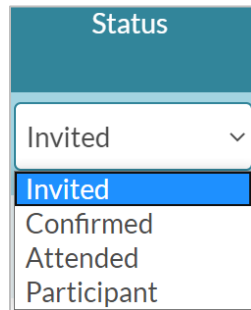
**Hide Filters**

				P ID	RSVP On	Updated On	Status	Type	Name	Address	Phone (H)	Phone (W)	
<input type="checkbox"/>	<span>✎</span> <span>⚠</span> <span>✖</span>	<span>Process \$</span> <span>Check In</span>		1778899		4/24/20	Invited		Acosta (Mr.), Sr.	2905 Wardmont Street San Diego, CA 92126	(281) 449-5953		
<input type="checkbox"/>	<span>✎</span> <span>⚠</span> <span>✖</span>	<span>Process \$</span> <span>Check In</span>		2727338		4/24/20	Invited		Amaya, Sofia	9330 Oglethorpe Drive Groveland, FL 34736		(703) 776-0327	7
<input type="checkbox"/>	<span>✎</span> <span>⚠</span> <span>✖</span>	<span>Process \$</span> <span>Check In</span>	<input checked="" type="checkbox"/>	1351467		4/24/20	Invited		Appelbaum, Jeanne C.	1507 Sunset Road Marlborough, MA 01752	433-1573		
<input type="checkbox"/>	<span>✎</span> <span>⚠</span> <span>✖</span>	<span>Process \$</span> <span>Check In</span>		1351472		4/24/20	Invited		Appelbaum (Mr.), Alan	3234 N Clifton Avenue, Unit 4 Denver, CO 80224	(847) 291-9460		
<input type="checkbox"/>	<span>✎</span> <span>⚠</span> <span>✖</span>	<span>Process \$</span> <span>Check In</span>		2727334		7/1/20	Invited		Banks (Mr.), Joseph M., Sr.	1593 Spring Hill Rd Suite 400 Vienna, VA 22182	(123) 456-7890	(717) 888-9172	7

Print Call Sheets Mail Merge Export

- In order to help you manage your invitees easier, a mass update functionality has been added where you can **Change Status** or **Check In** multiple invitees instead of having to update their information one at a time. You need to check the checkboxes for each invitee you want to update, or you can check the checkbox at the left corner of the black header section to select all invitees and then click the **Update Selected** button.
- Use the **Quick Search** bar in the **Invitees** section or the **Status**, **Type**, **Checked In**, or **CTD Greater Than/Equal To** search filters to find particular invitees or guests.
- Click the  button to edit the record's **Event Participation** for this particular event, click the  button to open the invitee's people record, or click the  button to remove the invitee from the event.

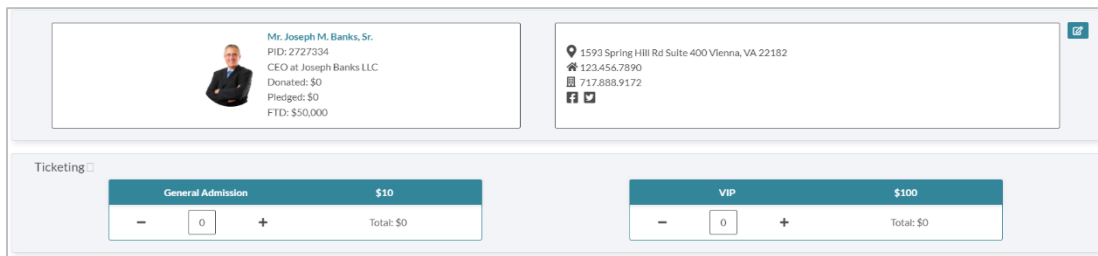
- Click the **Process \$** button to process a credit card for the invitee now or create a pledge for the invitee for this event. For more information about the **Process \$** feature in **Events**, please see below. Click the **Check In** button to mark the invitee as checked in to the event.
- To quickly update an invitee's **Status**, open the drop-down menu and select the new status from the available options. Once selected, that invitee's status will automatically be updated.



To learn more about the Events' Mobile Version, see the [Julep – Events Mobile Version](#) guide on our HelpDesk.

## Process \$

- When you click the **Process \$** button, you can view summary details for the invitee, contact information, the **Ticketing** options, and the option for the invitee to **Pay Now (CC)** or **Pay Later (Pledge)**.
- Under the summary details for the invitee, you will be able to see if the invitee has any tickets already assigned to them for this event.
- When you use the **Ticketing** feature, it will automatically calculate the **Amount** according to the number of tickets you choose to purchase, but you can manually change that amount if the invitee chooses to donate on top of their ticket purchases. Please note, that tickets can be assigned under **Process \$** whether the donor decides to **Pay Now (CC)** or **Pay Later (Pledge)**.
- Once you've completed the fields in the **Pay Now (CC)** section and checked the **Disclaimer** checkbox, click the **Enter Payment** button to enter the credit card information and process the payment.





- If the invitee chooses to pledge instead, select **Pay Later (Pledge)**, complete the pledge fields and click the **Save**

Pay Now (CC)		Pay Later (Pledge)	
Pledge Amount \$ 0	Membership ▼	Received In-House Date	Gift Officer Track#
Pledge Date 07/02/2020	Comment	Amount \$	Amount \$
Expect Date			
Fund Code EDU - Education Fund			+ Add Fundraiser
Source Code			Balance 0

## Radius Search

- Within the **Map** tab, on the bottom right side of the map, is a **Radius Search** feature that allows you to search for **People Records** within up to 50 miles from the Event's location. You can filter by CTD Amount, Highest Gift Amount, Last Gift Amount, Last Gift Date, and/or Invite Type.
- The results of your search will populate the map. Once complete, you can then either export your results to an Excel by clicking **Export** or invite these records to your event by clicking **Invite**.



## Briefing

- An **Event Briefing** can be created directly in Julep and printed when needed. A link to this briefing can be created by clicking the  button, to open the briefing in a new window.
- The **Event Briefing** includes the event's main details, **Contacts**, a **Timeline**, **Content** along with an image, and an **Invitees List**.
- To make edit to the **Event Briefing**, click the  button.


EVPAN21-Pancake Breakfast 2021


Contacts Timeline Content Invitees List



+

**Joseph Carothers**  

Staff Lead at Julep CRM


 921.928.8228


 jcarothers@cmdi.com

**Mr. Joseph M. Banks, Sr.**  

Host

CEO at Joseph Banks LLC

 123.456.7890

 717.888.9172

- In the **Manage Edit Briefing** page, you can edit and add **Contacts, Timeline** information, **Content,** and **Invitees List.**