Julep – Events: Creating a New Event

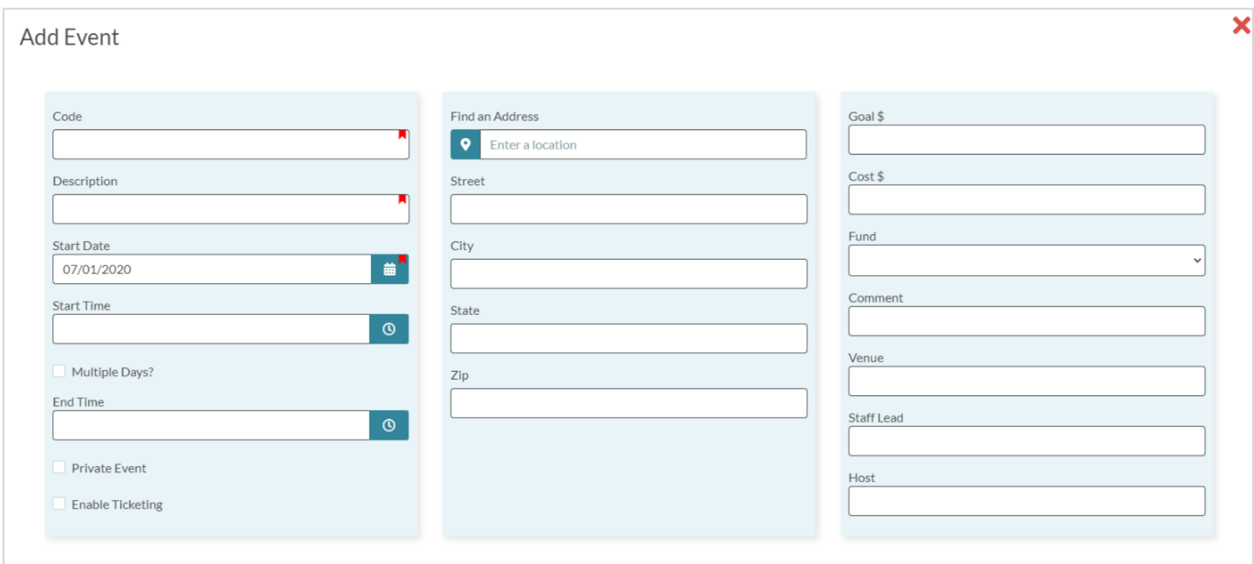
Julep allows you to create and manage your fundraising events in the **Event Dashboard**. Follow the directions below to create a new event.

To learn more about the **Event Dashboard**, see the **Julep – Event Dashboard** guide on our HelpDesk. To learn more about editing an event and/or the newest event features, see the **Julep – Editing Event Details** and/or the **Julep – Event Features** guides on our HelpDesk.

Creating an Event

1. To create a new event, go to the **Event Dashboard**.

2. Click the **Add Event** dashboard button. A new **Event** window will appear for editing.



3. Enter all of your event's information into the fields. Required fields are marked with a  indicator: **Code**, **Description**, and **Start Date**. When you have entered all of your event's details into the fields, click 

to create and save the event.

Additional Fields

- For events that occur over multiple days, check the 

checkbox to add a second set of date and time fields – **End Date** and **End Time**.
- You may add a goal fundraising amount in the **Goal $** field, a cost amount in the **Cost $** field, select the default **Fund Code** from the drop-down menu, and leave a **Comment**.

- For the event's location, you can use the 

tool to search for an address. As you begin typing in a location, the drop-down will suggest matching addresses. When you select one, the address fields will automatically populate for you and the location will be mapped below.
- You also have the option of manually entering an address into the **Stree**t, **City**, **State**, **and Zip fields.**
- You may add additional info such as the **Venue**, **Host**, or **Staff Lead or check that the event is Private Event and Enable Ticketing.**
- When you have entered all of your event's details into the fields, click 

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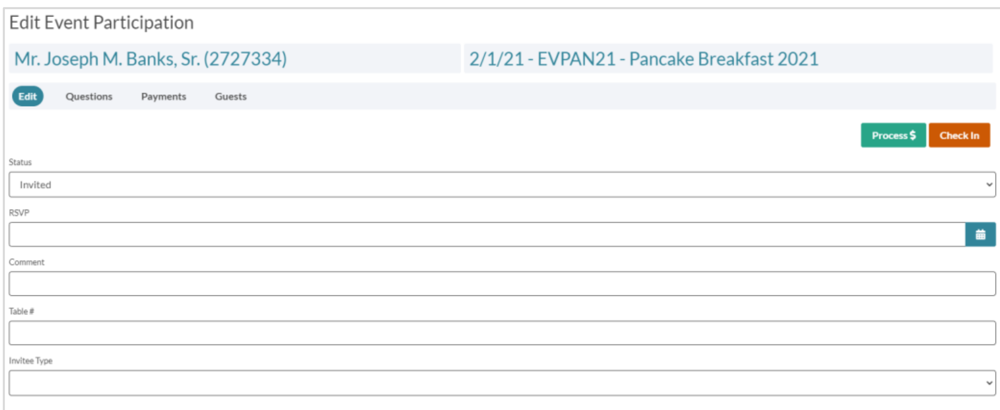
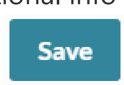
Adding Invitees to an Event

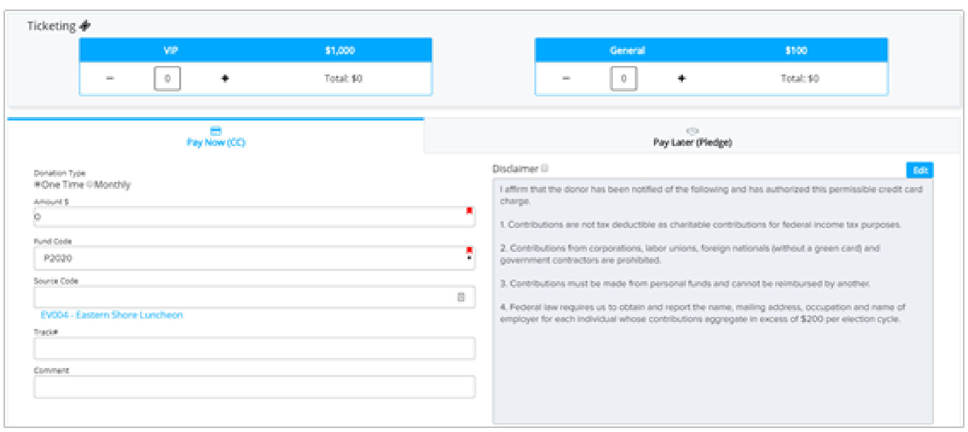


- To add a new invitee, navigate to the **Invitees** tab and click the 

button and the **Search Invitee** window will appear. Search for the record by either PID, First Name or Last Name. Select the correct record in the list of results by clicking the  button which will open an Edit Event Participation window.
- The **Event Code** and **Description** will display at the top of the page. Select **Invited**, **Confirmed**, **Declined**, etc. from the **Status** drop-down menu. To create/edit event statuses that display in the **Event Status** drop-down, go to the **Event Status** tab in **People Settings.**
- If the person has RSVP'd, enter the **RSVP** date in the field or click the calendar icon to select it from the calendar. You may enter a table assignment in the **Table #** field, add any additional info in the **Commen**t field, or edit the **Invitee Type** using the drop-down menu.
- Click 

to save the Event details to the **People Record**.
- In the **Edit Event Participation** window, you will see the following options or tabs: **Edit**, **Questions**, **Payments**, and **Guests**.
- You may enter any answers to questions associated with the event for the invitee under the **Questions** section.

- Under the **Payment** section, an existing contribution from the people record can be linked to the event by clicking the Link Gift button. A **list of the Donor's Gifts** will display. Click the  button beside the gift you want to link as a payment for this event. To remove a payment, click .
- You can add guests associated with that invitee (e.g. when the invitees are allowed one or more guests or if the "invitee" is an organization/PAC) under the **Guest** section.
- Click Add Contact As Guest to open a **list of the Donor's Contacts** and select a guest from the list by clicking the  button.
- To add a guest who is not listed as an existing contact, click New Guest to open an **Add Guest.** Enter the information about the guest and click Save.
- To process a new payment or pledge associated with the event, click the Process $ button. An **Event Donation** window with **Ticketing** options will appear where you can either process a credit card payment now or record a **Pledge**. You can use the **Ticketing** feature to update the number of tickets being purchased. When done click Save.



- Click the Check In button to electronically check the invitee into the event. Simply click the Un-Check In button to reverse this action and mark the invitee and not checked in.

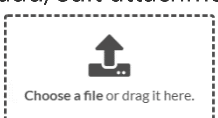
**Please note, you can choose to import an invitees list instead of adding records one-by-one by clicking the 

button and following the import steps.

Adding Questions to an Event

- You can add questions to an event under the **Questions** tab in the main event edit window. This allows you to specify certain information for each invitee. Click the  button, enter the question in the text field that appears, and then click the  button **to add it to the event**.
- To edit an existing question, double click on the question, make your edits, and then click the  button. If the question requires a numeric answer, click the checkbox in the **Numeric** column once to enable it.
- To delete an existing question, click the  button. A confirmation message will appear asking: "Are you sure to delete this question?". Select **Yes** or **No.**
- When in an invitee's **Edit Event Participation** window, you can complete the answers in the record's **Questions** tab.

Adding Attachments to an Event

- You can add/edit attachments in an event under **Attachments** tab. To add an attachment, click the 

button and select the file from your computer.
- To download an existing attachment to your computer, click the  button.
- To send an existing attachment as an email, click the  button, complete the email address (ie. To, CC, Subject, and Message), and click **Send**.
- To delete an existing attachment, click the . A confirmation message will appear asking: "Are you sure to delete _________". Select **Yes** or **No**.