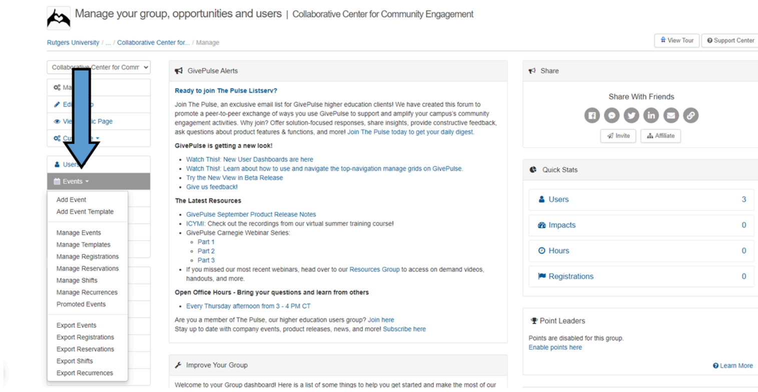
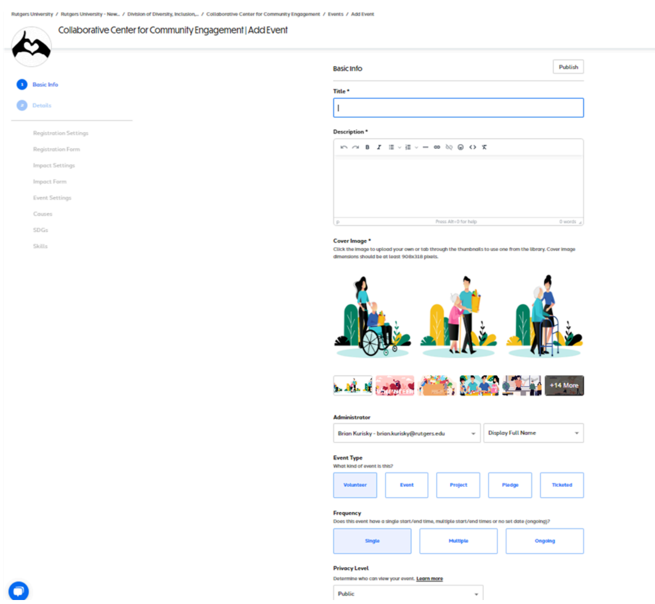
Creating an Event in GivePulse

This utilizes the New View within GivePulse.

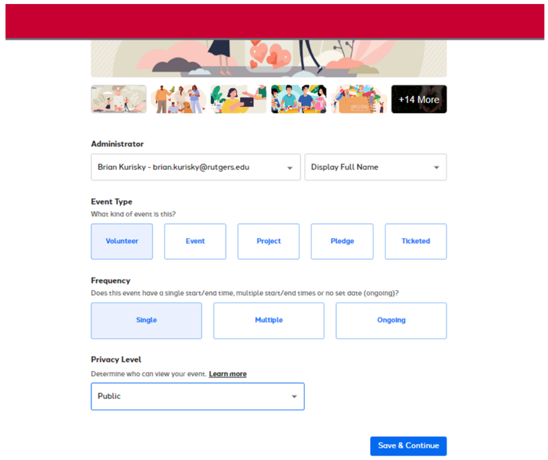


Select “ADD EVENT” from the Manage menu on your organization’s page.

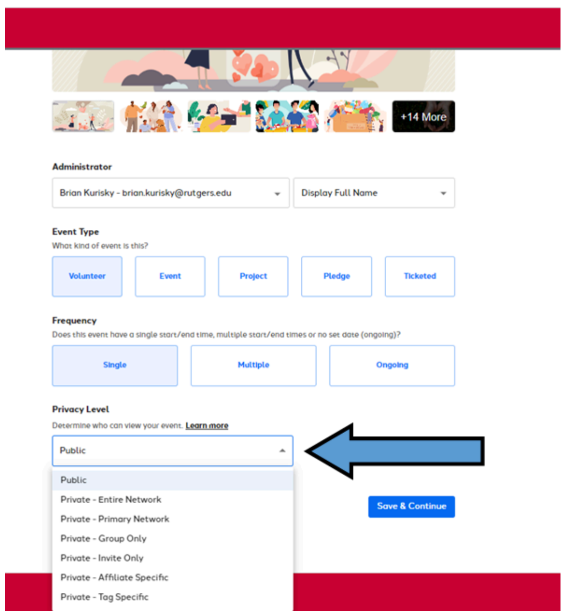
This brings you to the event creation workflow, starting with the Basic Information.



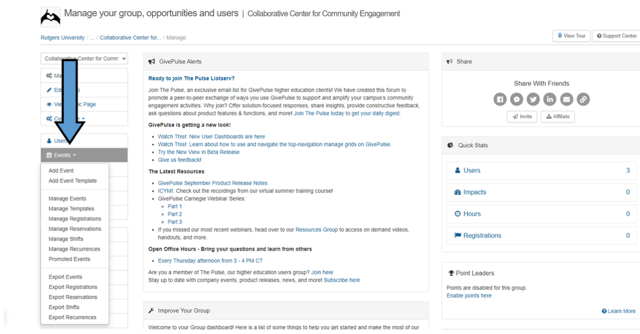
You have many type options. Based on your selections, GivePulse will customize other settings.

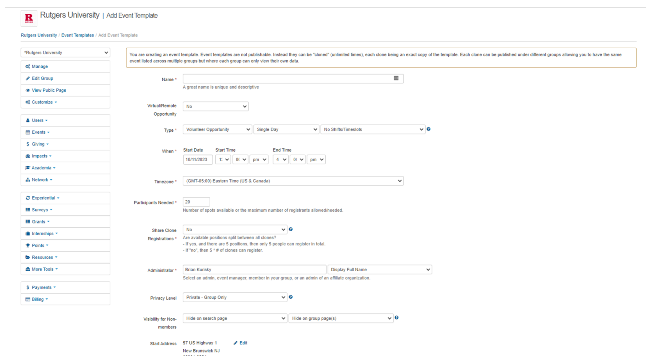


Don’t forget to adjust privacy and visibility settings based on who you want to register.



You can also create an event template that you can copy if you have events that are identical to save time. To do this, click on manage for your group and click on Manage Events and then click on Add Event Template.



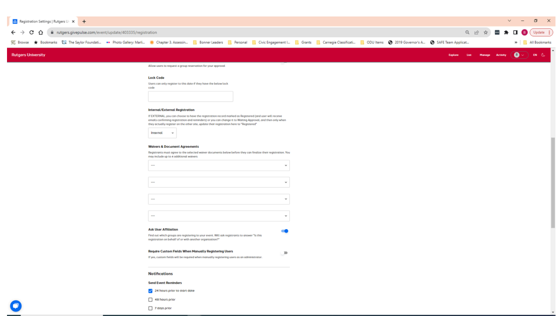


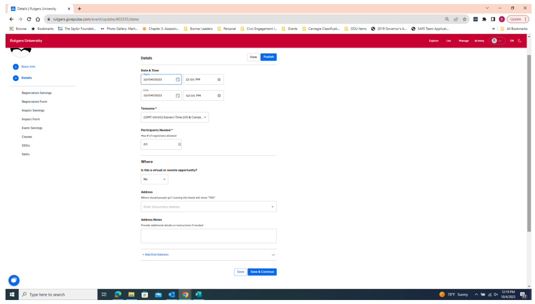
You can always use  buttons to see descriptions of all options for that setting

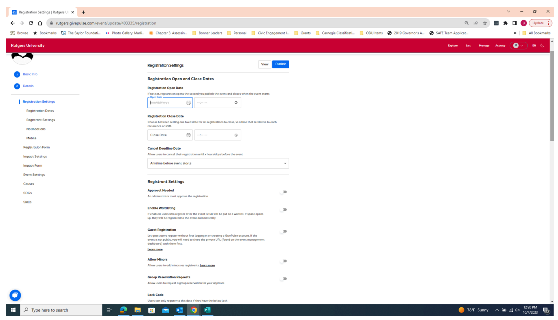
If you click to expand the Additional Information area, you can add more information about the event including requirement details.

If you click to expand Causes, you can assign causes to the event. These may be useful for those people are search for events based on the cause (Animal Welfare, Tutoring, etc.). It also allows you to give more information about who the event will benefit and the service type.

You can now either PUBLISH your event of SAVE AND CONTINUE to customize further (logos, registration settings, etc).



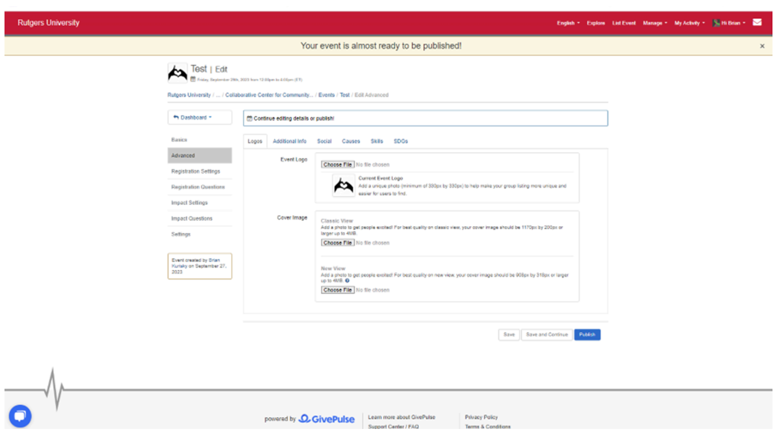




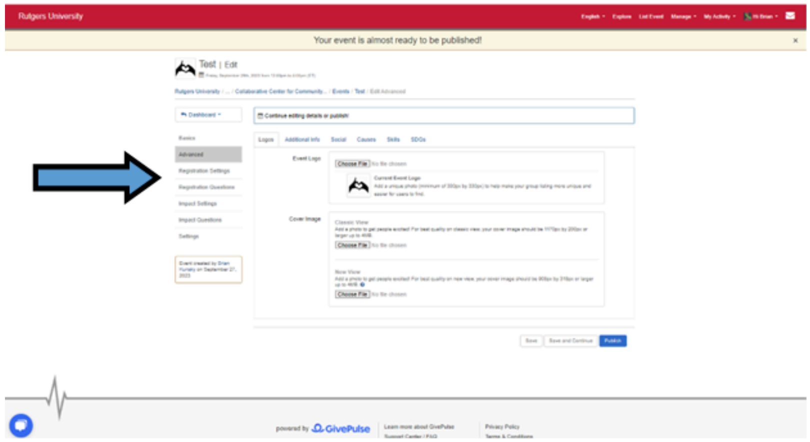
Beyond Basics Event Settings

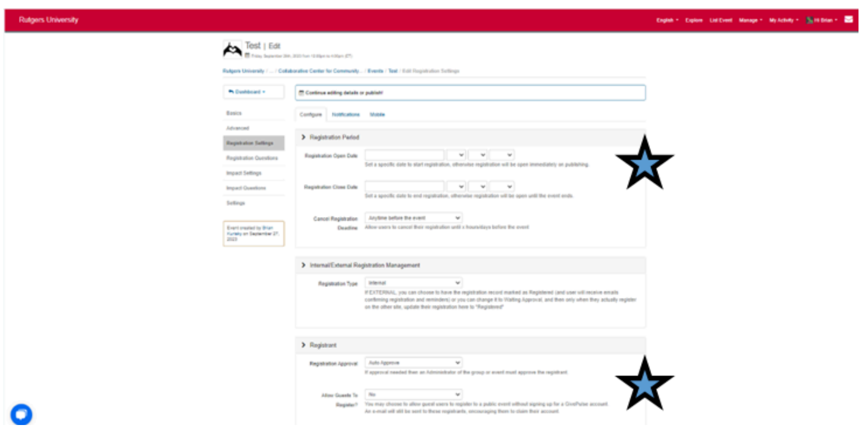
Press save and continue to move between each section

The ADVANCED settings allow you to add a logo, link to your website, share requirements, etc. You can use the Additional Info tab to provide the most up to date protocols.



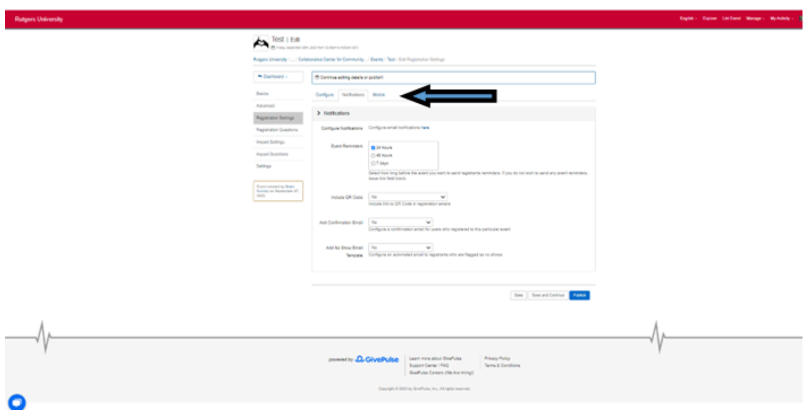
Adjust REGISTRATION SETTINGS to fit your event needs. Those starred below are often useful to consider.



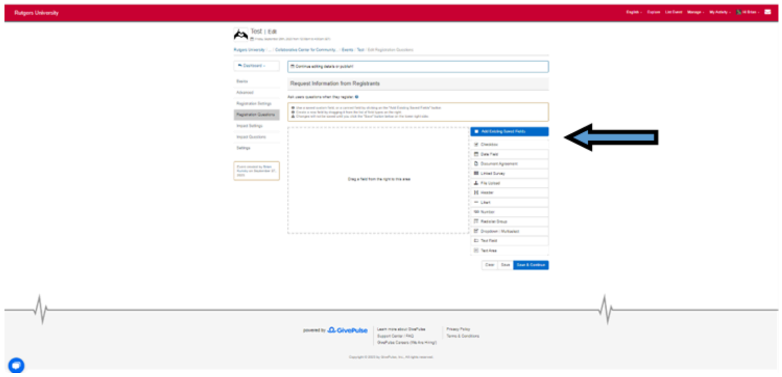


A great option if your event can host teams and you want a single point of contact. You can allow for group registration. If you enable in the Registrant area, make sure that you scroll down and enable Allow Group Reservation Requests under Group Reservations.

You can also switch to the Notifications tab at top to adjust how often registrants are reminded before the event and with what information.

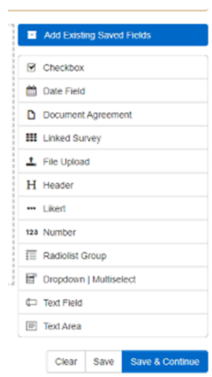


Use REGISTRATION QUESTIONS to collect information from participants as part of registration. You can use existing saved fields to ask questions that have been used in your other registrations or create new fields/questions for that specific event. We encourage you to always check saved fields before creating a new question.



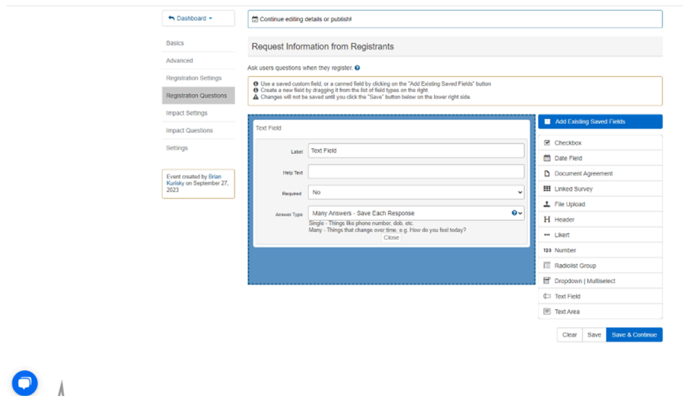
We encourage you to always ask about accessibility needs during the registration. You can use this existing question by searching in the existing saved fields.

There are many question types, including Multiple Choice/One Answer and Multiple Choice/Multiple Answers.

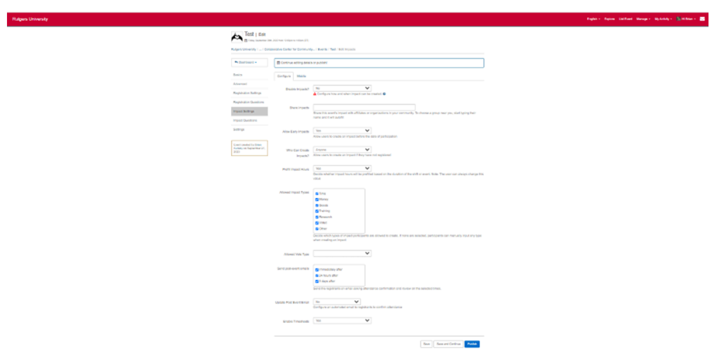


You can also edit each question's settings. Dragging over the type of question into the "Drag a field from the right to this area" will open up a dialogue box within that box that you can adjust the question including Answer Type to be "Single Answer" or "Many Answers."

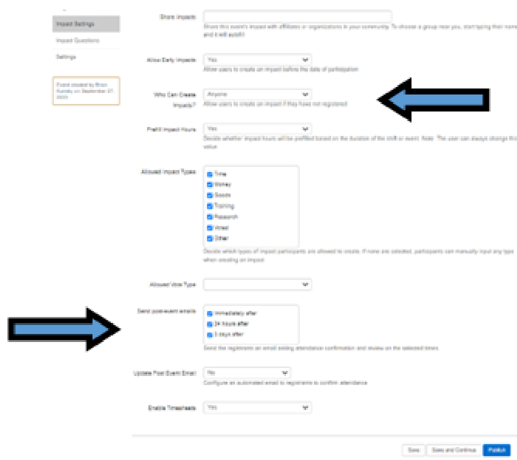
Single Answer will prefill a registrant's response if they have provided that info before (like phone number). Many Answers will save each response.



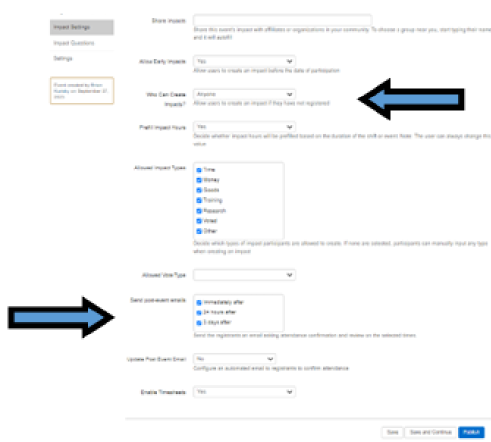
Impact Settings allow you to automate collecting participation and asking post-event questions. Impacts are the outputs of the events, like hours served, money donated, etc. GivePulse automatically records individuals' impacts and all the impacts for a particular event or group. If you have customized impact questions created, they do not automatically get pulled over to the event. You will need to click the IMPACT FORM area. Once there, you will click ADD EXISTING SAVED FIELDS. You will need to search for your exact question. Once you have found the question, check the box beside the question(s) and then click add. The customized impact questions will be present. If they are to be mandatory, you will need to go into each question and make them mandatory on the EVENT IMPACT FORM. While they may be mandatory within your group, they are not mandatory when pulled over for an EVENT IMPACT FORM.



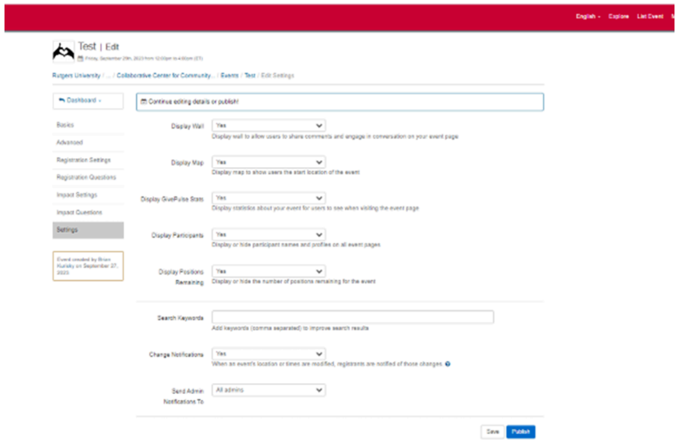
Use the settings to adjust when/how often registrants are reminded after the event to share their impacts as well as if you are allowing non-registrants to record an impact - a good option if you have walk-up participants.

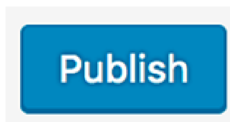


Just like with registration, you can use IMPACT QUESTIONS to collect information from participation after the fact. You do not need to ask for hours served since that is automatically collected as part of the impact.



Finally, SETTINGS allow you to decide details like if participants will be displayed on your event and who gets notified when a registration comes in.



Nothing left but to PUBLISH 

If you are looking at your published event and see something that needs updating, simply select Edit from the Admin Panel to go back to this workflow.

In the Edit workflow, you can always use the left side menu to navigate to a particular section of event editing.

<u>Creating an Event for Specific Affiliates, groups, organizations, classes, and businesses</u>

If you are a community partner who wants to create a unique event not for the public but for a specific affiliate, like a business or a university program or class, it can be done by:

Creating the event and making it completely private by changing the privacy level to “Affiliate Specific”.

With the affiliate specific setting, partners can now create events that are accessible and visible on specific "affiliate" pages. This is better than making the event private and invite only because it exposes the event in the group(s) listings and allows the members to search for the event and register without a unique private link.

If you are a subgroup and are creating it for a university subgroup or class, you can select “Private - Group Only.” After you select this Private - Group Only,” you will select one of two functions:

1. “Visible to non-members on search page” - this enables non-members to search for the event, but will not be able to register.
2. “Visible to non-members on group page” - this enables non-members to view the event, but will not make it searchable.

If one select either “Private - Entire Network” or “Private - Primary Network,” you will be able to:

1. “Entire Network” means members of the parent group, subgroups, or affiliates in your network are able to see and view the event.
2. “Primary Network” means members of the parent group and subgroups (*not* affiliates!) in your network are able to see and view the event.

If you select “Private - Invite Only,” only specific members that you invite using either a link or a code are able to see and register for the event. The link is available on the right side of the event dashboard. This is the **only** link that users can use to view the event. Administrator can generate a QR code using a QR generator with the shareable link for private event only to easily share with users.

<u>Impact Questions</u>

If your subgroup has customized impact questions, you will need to add them to the event. To do this,

- Please go to the group page and click the Manage Group and then Edit.
- Click Customize from the left side menu and then click Events
- On the next page, select Administrative Fields
- You can then add the questions by clicking Add Existing Saved Fields

- Sort by Created By and then scroll to find your Subgroup questions
- Check the box and add them
- If they are not mandatory in the group, you may wish to make them mandatory in the event and make them mandatory in the overall subgroup