

## Help Content: Fundraising Events

### HOW TO ADD AN EVENT

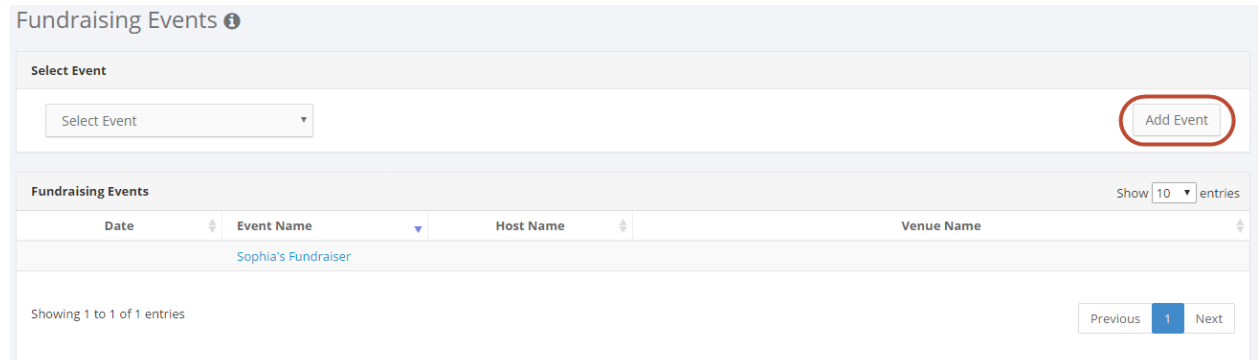
#### 1. Go to Fundraising Events.

Click **Transactions** and then **Fundraising Events**.



#### 2. Click Add Event.

You are now on the **Fundraising Events** screen. Click the **Add Event** button to proceed.



#### 3. Enter the details of the event and click Save.

C-SMART will alert you if you leave out required information. Complete the fields as follows:

- **Event Name:** Enter the name of the event.
- **Host Name:** Select the name of the individual or organization hosting the event, if applicable.
- **Event Date:** Enter the date when the event occurred. You may do this by entering the date in the field using the MM/DD/YYYY format or by selecting a date from the calendar that appears when you click on the blank field.
- **Venue Name:** Enter the name of where the event took place.
- **Location:** Enter the address details of the venue.

**CANDIDATE SERVICES TIP(S):**

- ✓ Upon clicking **Save**, if a warning message pops up, read it. It might notify you of a potential compliance issue that you need to address immediately.
- ✓ Use the **tab** key to navigate through the fields so that you don't miss one.

**Enter Details**

\* **Event Name:**

**Host Name:**

**Event Date:**

**Venue Name:**

**Location:**

**4. Your event has been successfully saved.**

At this point, C-SMART will go back to the **Fundraising Events** screen. You will see that the event that you just added is included at the bottom of the page.

**CANDIDATE SERVICES TIP(S):**

- ✓ *The campaign must disclose every contribution received at and expenditure made for every fundraising event. Using the Fundraising Events Maintenance tool makes this easier. When you add contributions, bills, and other transactions related to a fundraiser, you can link the financial activity with the fundraiser when you enter each transaction.*
- ✓ *Run the [Fundraising Events Report](#) to see the full list of contributions received at and expenditures made for each fundraising event.*

**Fundraising Events** ⓘ

Select Event

Fundraising Events				Show 10 entries
Date	Event Name	Host Name	Venue Name	
<a href="#">Sophia's Fundraiser</a>				
9/23/2016	Sophia's Birthday Party	Rosario, Tanya	Home of Tanya Rosario	

Showing 1 to 2 of 2 entries

**HOW TO EDIT AN EVENT**

**1. Click the Event Name.**

From the **Fundraising Events** screen, click on the name of the event that you wish to edit.

Fundraising Events ?

Select Event

Select Event ▼ Add Event

Fundraising Events Show 10 entries

Date	Event Name	Host Name	Venue Name
	<a href="#">Sophia's Fundraiser</a>		
9/23/2016	<a href="#">Sophia's Birthday Party</a>	Rosario, Tanya	Home of Tanya Rosario

Showing 1 to 2 of 2 entries Previous 1 Next

**2. Click Edit.**

Once you are on the page for the specific event you wish to modify, click **Edit**.

Sophia's Birthday Party Back to Fundraising Events

[Edit](#) [Delete](#)

Event Details

**Event Name:** Sophia's Birthday Party  
**Host Name:** Rosario, Tanya  
**Event Date:** 09/23/2016  
**Venue Name:** Home of Tanya Rosario  
**Location:** 100 Water Street  
New York NY 10006

Entered By: Admin Date: 09/23/2016 03:17 PM Updated By: Admin Date: 09/23/2016 03:17 PM

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**3. Update and click Save.**

Modify, add, or remove the applicable fields and then click **Save**.

**CANDIDATE SERVICES TIP(S):**

- ✓ Notice that the timestamp will be updated to reflect who made the modification to the transaction and when.

**Enter Details**

\* **Event Name:**

**Host Name:**

**Event Date:**

**Venue Name:**

**Location:**

Entered By: Admin Date: 09/23/2016 03:17 PM Updated By: Admin Date: 09/23/2016 03:17 PM

4. The event has been successfully edited.

## HOW TO DELETE AN EVENT

### 1. Click the Event Name.

From the **Fundraising Events** screen, click on the name of the event that you wish to delete.

Fundraising Events ⓘ

Select Event

Fundraising Events Show 10 entries

Date	Event Name	Host Name	Venue Name
9/16/2016	<a href="#">Sophia's Fundraiser</a> <a href="#">Sophia's Birthday Party</a>	Rosario, Tanya	Home of Tanya Rosario

Showing 1 to 2 of 2 entries Previous 1 Next

### 2. Click Delete.

Once you have reviewed the saved event and are positive that this was entered in error and did not actually occur, you can click the **Delete** button.

Sophia's Birthday Party [Back to Fundraising Events](#)

Edit  Delete

**Event Details**

**Event Name:** Sophia's Birthday Party  
**Host Name:** Rosario, Tanya  
**Event Date:** 09/16/2016  
**Venue Name:** Home of Tanya Rosario  
**Location:** 100 Water Street  
New York NY 10006

Entered By: Admin Date: 09/23/2016 03:17 PM Updated By: Admin Date: 09/23/2016 03:21 PM

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**3. The event has been successfully deleted.**

**CANDIDATE SERVICES TIP(S):**

- ✓ *In most cases, you should delete a transaction only if you are sure it was entered or saved in error and did not actually occur.*