C-SMART HELP

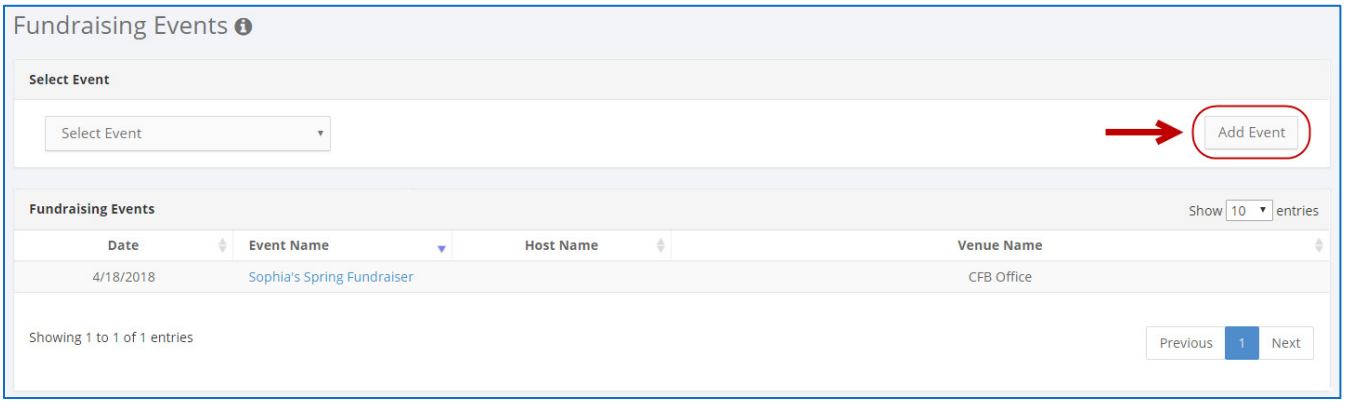
FUNDRAISING EVENTS

HOW TO ADD AN EVENT

1. Go to **Fundraising Events**.

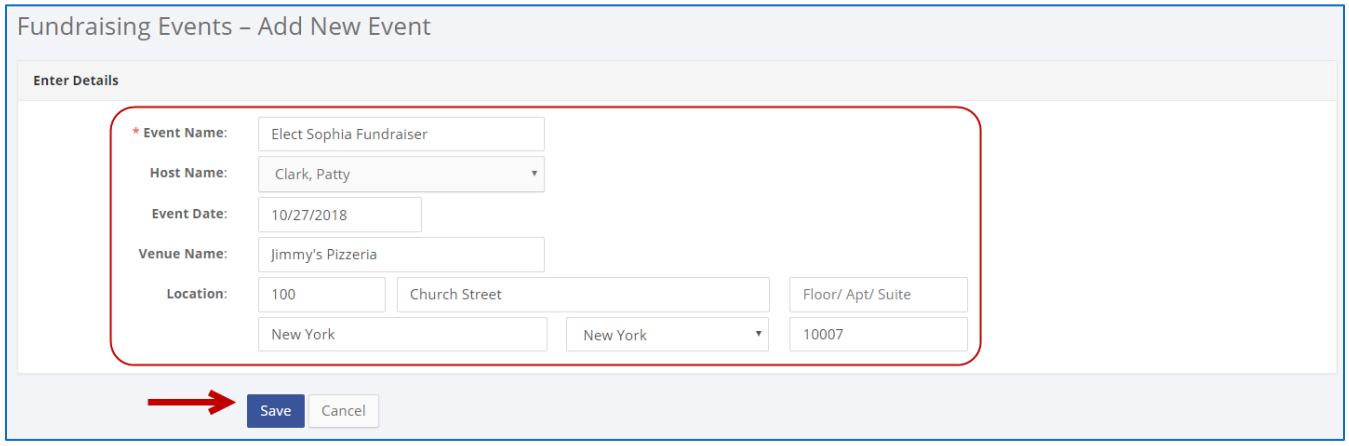
   ➢ Hover your cursor over **Transactions** and click **Fundraising Events**.

2. Click **Add Event**.



3. Enter and save the event details.

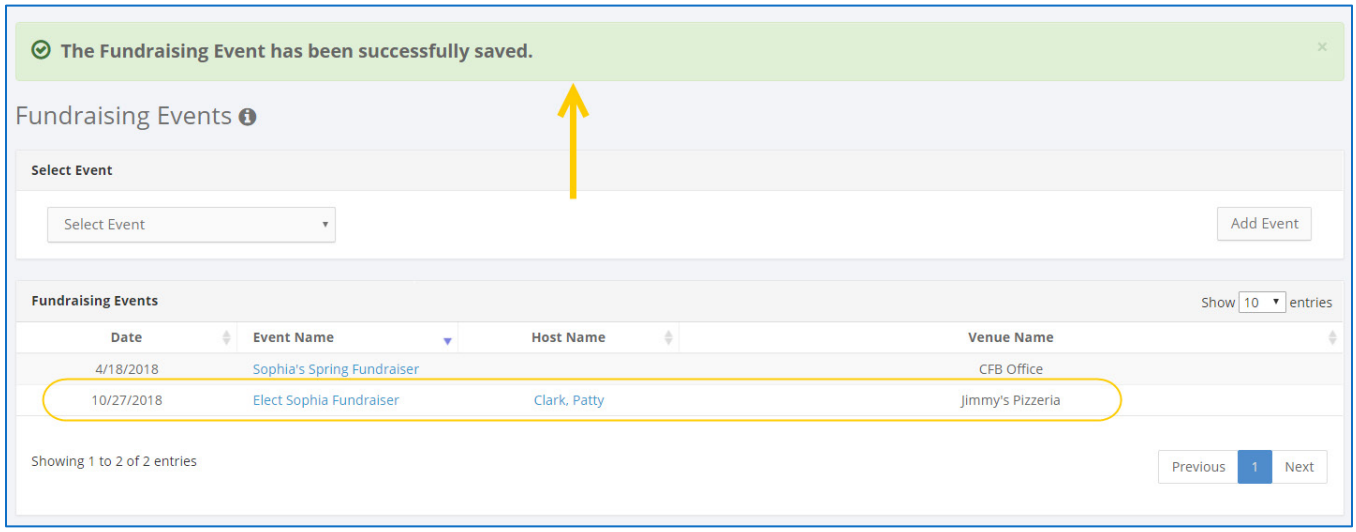
   - C-SMART will alert you if you leave out required information. Complete the fields below:
     - **Event Name:** Enter the name of the event.
     - **Host Name:** If necessary, indicate the person or organization hosting the event.
     - **Event Date:** Enter the date when the event occurred.
     - **Venue Name:** Enter where the event took place.
     - **Location**: Enter the venue's address.
   - Then, click **Save**.



Best Practice: Use the tab key to navigate between fields. Upon clicking Save, if a warning message pops up, read it. It may refer to a potential compliance issue you need to address immediately.

4. The event has been successfully saved.

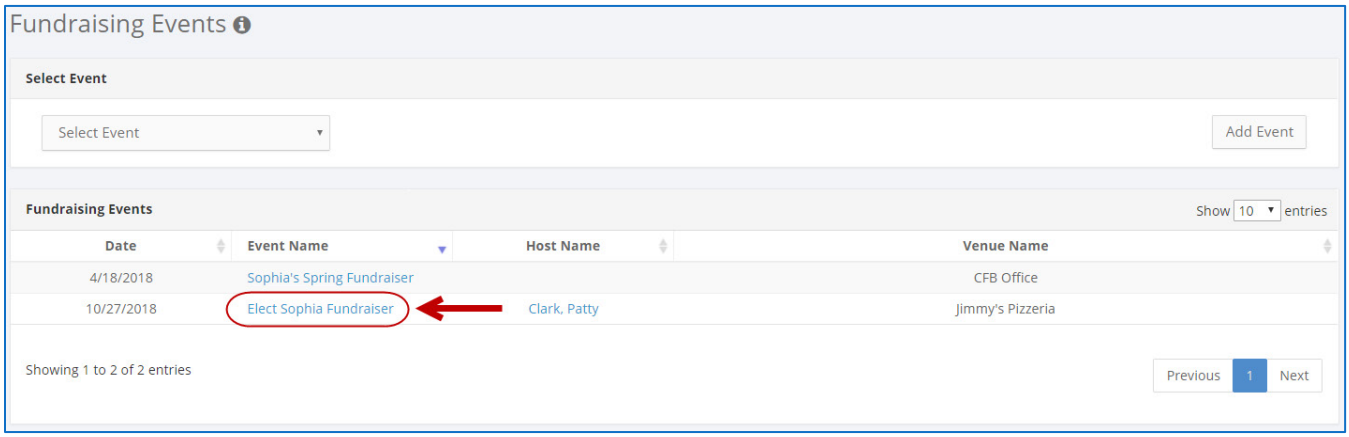
   - C-SMART will return you to the **Fundraising Events** page. The list of events will be updated to show the newly saved event.



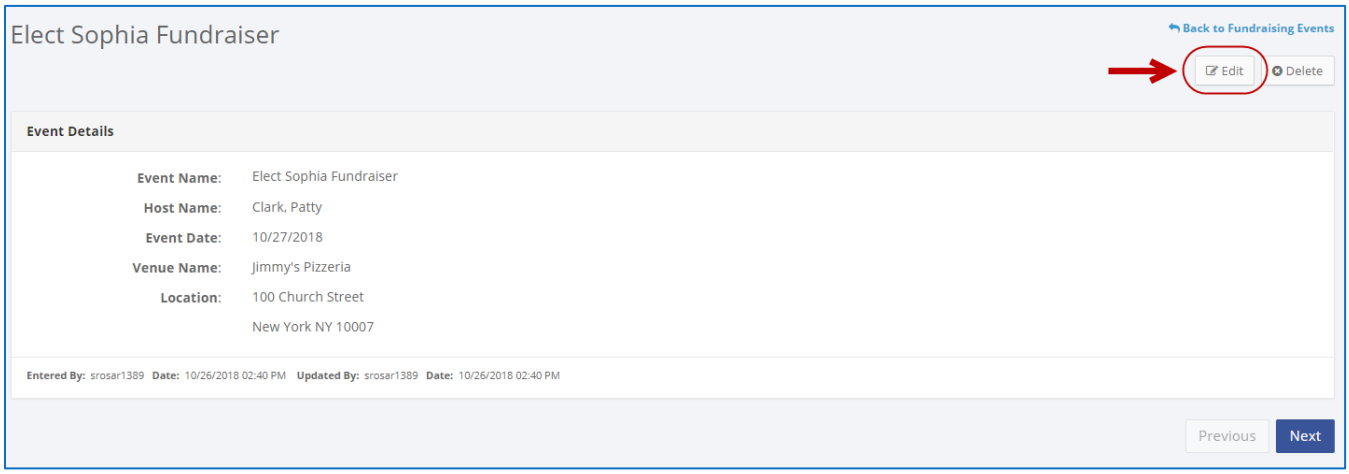
Best practices: The **Fundraising Events Report** allows you to review a list of all your fundraisers along with the contributions and expenditures related to each. The **Fundraising Events Maintenance** will allow you to link contributions, bills, and other transactions related to a fundraiser.

HOW TO EDIT AN EVENT

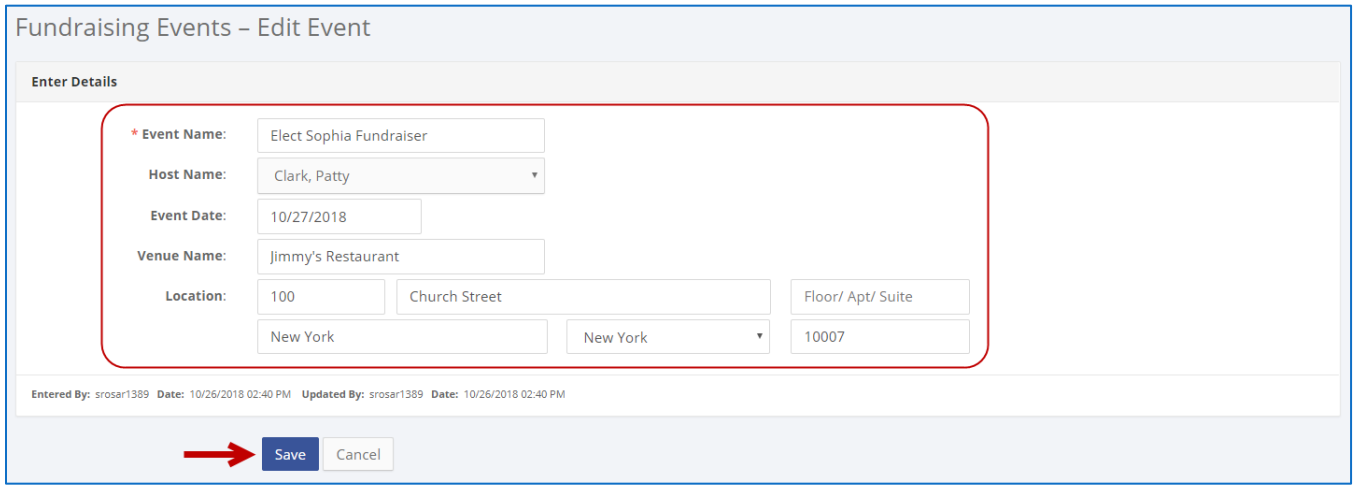
1. Go to the **Fundraising Events** page and click the **Event Name**.



2. Click **Edit**.

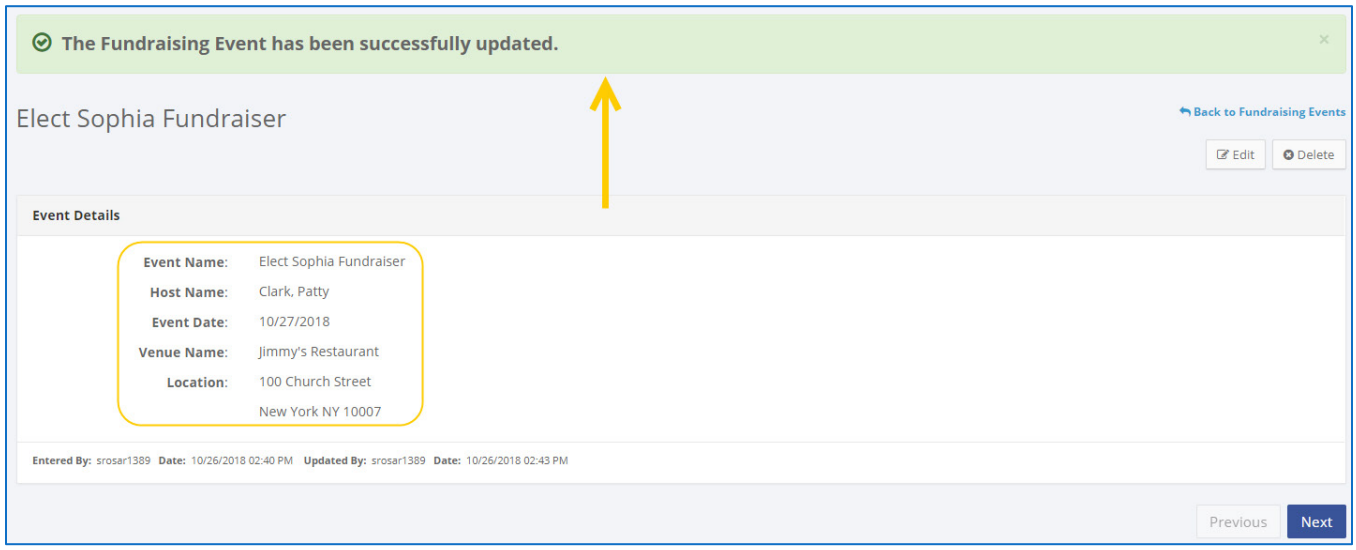


3. Modify the necessary fields and click **Save**.



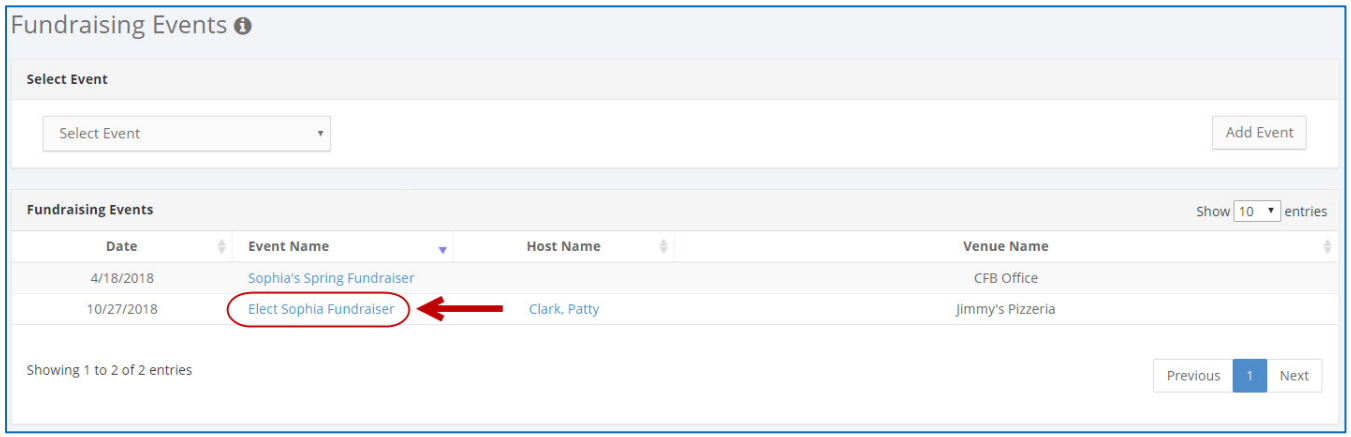
Important: The timestamp at the bottom will be updated to show who last modified the transaction.

4. The event has been successfully edited.

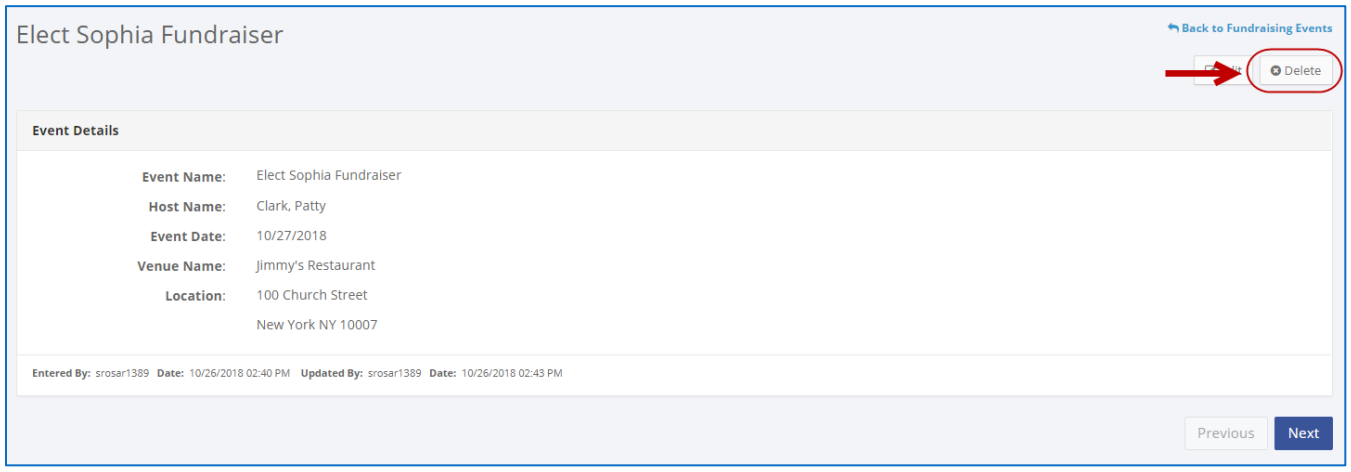


HOW TO DELETE AN EVENT

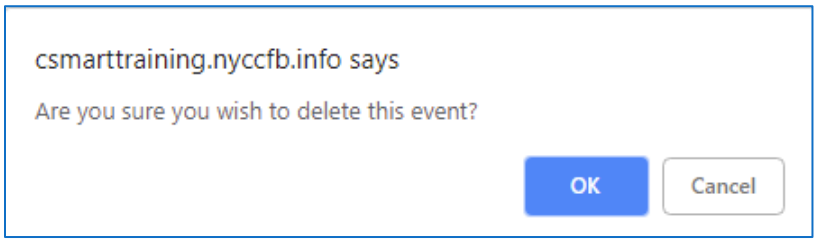
1. Go to the **Fundraising Events** page and click the **Event Name**.



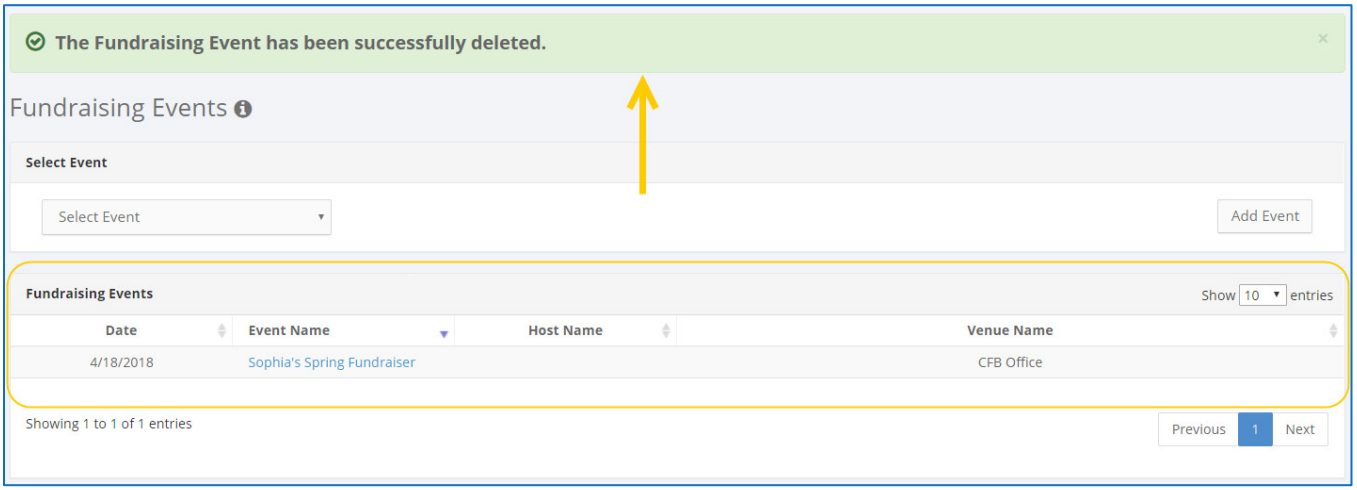
2. Click **Delete** to proceed.



- Click **OK** on the dialog box that opens to complete the deletion.



3. The event has been successfully deleted.



Important: You should generally only delete a transaction if it was entered in error.