

Three Types of Events with Donations

	Fundraising Event	Free w/ Optional Donation	Standard Fees w/ Opt Donation
Key Configurations			
IMA	Configured at: <i>Event Information > Custom Fields > Payment Path</i> <i>Event Configuration > Fees > Merchant Account</i>		
Payment Path	"CU Foundation Cvent"	"CU Foundation Cvent"	"CU Cvent"
Merchant Account	"CU Foundation Cvent"	"CU Foundation Cvent"	"CU Cvent"
Speedtype, Account Code and Allocation Code	Configured at: <i>Event Information > Custom Fields</i>		
Speedtype	"No Speed Type Required"	"No Speed Type Required"	Unit's Fund 29 or Fund 20 Revenue ST -absolutely cannot be a Fund 34 ST (which is only for donations and strictly controlled). -Must request via TaskRay to add as option
Account Code	"No Account Code Required"	"No Account Code Required"	Appropriate Revenue Account Code -must request via TaskRay to add as option
Will you have an optional donation in your form?	"Yes" if also using Optional Donation item, otherwise leave blank	"Yes"	"Yes"
Allocation Code (dropdown)	Select Special Event Allocation Code <i>-must be created in coordination with Karen Ichiba (and must request via TaskRay to add as option)</i>	Select Allocation Code for an Existing Fund <i>-eligible funds include those on giving.cu.edu or any current fund in Advance (must request via TaskRay to add as option)</i>	"N/A" <i>-allocation is specified in donation item name, but also must be one of the unit's existing funds found on giving.cu.edu or in Advance</i>
Allocation Code-old (text box) <i>-old field, deprecated</i>	ignore/leave blank	ignore/leave blank	ignore/leave blank

Required Contact Fields	Configured at: <i>Registration Settings > Select Registration Path > Contact Fields Tab</i> -must have the following fields configured as described, and each registration path must be configured separately if using more than one		
First Name, Last Name and Email	Required (should be by default)	Required (should be by default)	Required (should be by default)
Full Address	Required <i>-recommend using "Home Address" option unless Companies/Orgs are only ones registering (e.g. using Cvent to offer company sponsorships for an event but not individual tickets)</i>	Required <i>-recommend using "Home Address" option</i>	Required <i>-recommend using "Home Address" option</i>
Phone Number	Required <i>-recommend using "home" and/or "mobile" phone options</i>	Required <i>-recommend using "home" and/or "mobile" phone options</i>	Required <i>-recommend using "home" and/or "mobile" phone options</i>
Address Fields settings <i>-these are recommended settings, and make reporting easier</i>	Default Primary Address: "Home" or "Work" <i>(see clarification in note for Full Address field)</i> Invitees can select primary address: "No" <i>(This doesn't work the way you may think. Only works if you are collecting both Home and Work Addresses in above Personal Fields section.)</i> Invitees can change their country: "Yes" Default Country: "USA"	Default Primary Address: "Home" Invitees can select primary address: "No" <i>(This doesn't work the way you may think. Only works if you are collecting both Home and Work Addresses in above Personal Fields section.)</i> Invitees can change their country: "Yes" Default Country: "USA"	Default Primary Address: "Home" Invitees can select primary address: "No" <i>(This doesn't work the way you may think. Only works if you are collecting both Home and Work Addresses in above Personal Fields section.)</i> Invitees can change their country: "Yes" Default Country: "USA"
Optional Contact Fields	Configured at: <i>Registration Settings > Select Registration Path > Contact Fields Tab</i> -ONLY required if user/planner believes some registrants may pay using a company/org credit card or checking account		
Company	Visible (not required, though you can require)	Visible (not required, though you can require)	Visible (not required, though you can require)
Company should receive credit for the donation? <i>-already available in list of fields when you click "Add field" button in Personal Info section</i>	Visible (not required)	Visible (not required)	Visible (not required)

Optional Donation items	Configured at: <i>Agenda Items > Optional Items</i>		
Name	Official Fund Name followed by the allocation code in parenthesis Ex. <i>President's Opportunity Fund (#0821004)</i> -can find on giving.cu.edu or in Advance, or can ask Advancement staff in their unit for help.	Official Fund Name followed by the allocation code in parenthesis Ex. <i>President's Opportunity Fund (#0821004)</i> -can find on giving.cu.edu or in Advance, or can ask Advancement staff in their unit for help.	Official Fund Name followed by the allocation code in parenthesis Ex. <i>President's Opportunity Fund (#0821004)</i> -can find on giving.cu.edu or in Advance, or can ask Advancement staff in their unit for help.
General Ledger Codes	ignore/leave blank	ignore/leave blank	ignore/leave blank
Description	At minimum, must contain the following: <ul style="list-style-type: none"> Official Fund Description (as defined on giving.cu.edu or in Advance) This text: <i>"All gifts in support of the University of Colorado are processed and receipted by the University of Colorado Foundation, a 501(c)(3) charitable entity."</i> Example (official description highlighted): <i>"If you would like to make a donation to provide University-wide support at the discretion of the President of the University of Colorado, please enter the amount below.</i> <i>All gifts in support of the University of Colorado are processed and receipted by the University of Colorado Foundation, a 501(c)(3) charitable entity."</i>	At minimum, must contain the following: <ul style="list-style-type: none"> Official Fund Description (as defined on giving.cu.edu or in Advance) This text: <i>"All gifts in support of the University of Colorado are processed and receipted by the University of Colorado Foundation, a 501(c)(3) charitable entity."</i> Example (official description highlighted): <i>"If you would like to make a donation to provide University-wide support at the discretion of the President of the University of Colorado, please enter the amount below.</i> <i>All gifts in support of the University of Colorado are processed and receipted by the University of Colorado Foundation, a 501(c)(3) charitable entity."</i>	At minimum, must contain the following: <ul style="list-style-type: none"> Official Fund Description (as defined on giving.cu.edu or in Advance) This text: <i>"All gifts in support of the University of Colorado are processed and receipted by the University of Colorado Foundation, a 501(c)(3) charitable entity."</i> Example (official description highlighted): <i>"If you would like to make a donation to provide University-wide support at the discretion of the President of the University of Colorado, please enter the amount below.</i> <i>All gifts in support of the University of Colorado are processed and receipted by the University of Colorado Foundation, a 501(c)(3) charitable entity."</i>
All Other Agenda Items (not donation)	Configured at: <i>Event Details > Agenda Items</i> -for all items other than Optional Donation item(s)		
All Other Items	If a fee for an item includes both a donation and non-donation portion, you must list the Fair Market Value for the non-donation portion in the description of the item. Ex. <i>"The Fair Market Value of food/beverage is \$33.00 per person."</i>	Not Applicable. Free events with optional donation should only use the Option Donation item.	All other Agenda Items and associated fees can be configured as usual. Note: Donations cannot be accepted using any Agenda Item type other than Optional Donation item, and cannot be included as a portion of any fee.

Summary Page, Confirmation Page and Confirmation Email	<p>Configured at: <i>Event Information > Details > Description</i> <i>Registration Pages > Select Registration Path > Confirmation</i> <i>Event Emails > Registration Confirmation</i></p> <p>-for Confirmation Page, each registration path must be configured separately if using more than one</p>		
Somewhere in description or body of each	<p><i>"All gifts in support of the University of Colorado are processed and receipted by the University of Colorado Foundation, a 501(c)(3) charitable entity."</i></p>	<p><i>"All gifts in support of the University of Colorado are processed and receipted by the University of Colorado Foundation, a 501(c)(3) charitable entity."</i></p>	<p><i>"All gifts in support of the University of Colorado are processed and receipted by the University of Colorado Foundation, a 501(c)(3) charitable entity."</i></p>