

# Three Types of Events with Donations

	Fundraising Event	Free w/ Optional Donation	Standard Fees w/ Opt Donation
Key Configurations			
<b>IMA</b>	Configured at: <i>Event Information &gt; Custom Fields &gt; Payment Path</i> <i>Event Configuration &gt; Fees &gt; Merchant Account</i>		
<b>Payment Path</b>	"CU Foundation Cvent"	"CU Foundation Cvent"	"CU Cvent"
<b>Merchant Account</b>	"CU Foundation Cvent"	"CU Foundation Cvent"	"CU Cvent"
<b>Speedtype, Account Code and Allocation Code</b>	Configured at: <i>Event Information &gt; Custom Fields</i>		
<b>Speedtype</b>	"No Speed Type Required"	"No Speed Type Required"	Unit's Fund 29 or Fund 20 Revenue ST  <b>-absolutely cannot be a Fund 34 ST (which is only for donations and strictly controlled).</b> <b>-Must request via TaskRay to add as option</b>
<b>Account Code</b>	"No Account Code Required"	"No Account Code Required"	Appropriate Revenue Account Code  <b>-must request via TaskRay to add as option</b>
<b>Will you have an optional donation in your form?</b>	"Yes" if also using Optional Donation item, otherwise leave blank	"Yes"	"Yes"
<b>Allocation Code (dropdown)</b>	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>
<b>Allocation Code-old (text box)</b>  <i>-old field, deprecated</i>	ignore/leave blank	ignore/leave blank	ignore/leave blank

<b>Required Contact Fields</b>	Configured at: <i>Registration Settings &gt; Select Registration Path &gt; Contact Fields Tab</i> <b>-must have the following fields configured as described, and each registration path must be configured separately if using more than one</b>		
<b>First Name, Last Name and Email</b>	Required (should be by default)	Required (should be by default)	Required (should be by default)
<b>Full Address</b>	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>
<b>Phone Number</b>	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>
<b>Address Fields settings</b> <i>-these are recommended settings, and make reporting easier</i>	<b>Default Primary Address:</b> "Home" or "Work" <i>(see clarification in note for Full Address field)</i> <b>Invitees can select primary address:</b> "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> <b>Invitees can change their country:</b> "Yes" <b>Default Country:</b> "USA"	<b>Default Primary Address:</b> "Home" <b>Invitees can select primary address:</b> "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> <b>Invitees can change their country:</b> "Yes" <b>Default Country:</b> "USA"	<b>Default Primary Address:</b> "Home" <b>Invitees can select primary address:</b> "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> <b>Invitees can change their country:</b> "Yes" <b>Default Country:</b> "USA"
<b>Company should receive credit for the donation?</b> <i>-already available in list of fields when you click "Add field" button in Personal Info section</i>	Visible (required)	Visible (required)	Visible (required)
<b>Optional Contact Fields</b>	Configured at: <i>Registration Settings &gt; Select Registration Path &gt; Contact Fields Tab</i> <b>-ONLY required if user/planner believes some registrants may pay using a company/org credit card or checking account</b>		
<b>Company</b>	Visible (not required, though you can require)	Visible (not required, though you can require)	Visible (not required, though you can require)

<b>Optional Donation items</b>	Configured at: <i>Agenda Items &gt; Optional Items</i>		
<b>Name</b>	<p>Official Fund Name followed by the allocation code in parenthesis</p> <p>Ex. <i>President's Opportunity Fund (#0821004)</i></p> <p><i>-can find on giving.cu.edu or in Advance, or can ask Advancement staff in their unit for help.</i></p>	<p>Official Fund Name followed by the allocation code in parenthesis</p> <p>Ex. <i>President's Opportunity Fund (#0821004)</i></p> <p><i>-can find on giving.cu.edu or in Advance, or can ask Advancement staff in their unit for help.</i></p>	<p>Official Fund Name followed by the allocation code in parenthesis</p> <p>Ex. <i>President's Opportunity Fund (#0821004)</i></p> <p><i>-can find on giving.cu.edu or in Advance, or can ask Advancement staff in their unit for help.</i></p>
<b>General Ledger Codes</b>	ignore/leave blank	ignore/leave blank	ignore/leave blank
<b>Description</b>	<p>At minimum, must contain the following:</p> <ul style="list-style-type: none"> <li>● <b>Official Fund Description</b> (as defined on giving.cu.edu or in Advance)</li> <li>● <b>This text:</b>  <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></li> </ul> <p><b>Example</b> (official description highlighted):</p> <p><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></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>At minimum, must contain the following:</p> <ul style="list-style-type: none"> <li>● <b>Official Fund Description</b> (as defined on giving.cu.edu or in Advance)</li> <li>● <b>This text:</b>  <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></li> </ul> <p><b>Example</b> (official description highlighted):</p> <p><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></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>At minimum, must contain the following:</p> <ul style="list-style-type: none"> <li>● <b>Official Fund Description</b> (as defined on giving.cu.edu or in Advance)</li> <li>● <b>This text:</b>  <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></li> </ul> <p><b>Example</b> (official description highlighted):</p> <p><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></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>
<b>All Other Agenda Items (not donation)</b>	Configured at: <i>Event Details &gt; Agenda Items</i> <b>-for all items other than Optional Donation item(s)</b>		
All Other Items	<p>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.</p> <p>Ex. <i>"The Fair Market Value of food/beverage is \$33.00 per person."</i></p>	<p>Not Applicable. Free events with optional donation should only use the Option Donation item.</p>	<p>All other Agenda Items and associated fees can be configured as usual.</p> <p><b>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.</b></p>

<p><b>Summary Page, Confirmation Page and Confirmation Email</b></p>	<p>Configured at:  <i>Event Information &gt; Details &gt; Description</i>  <i>Registration Pages &gt; Select Registration Path &gt; Confirmation</i>  <i>Event Emails &gt; Registration Confirmation</i></p> <p><b>-for Confirmation Page, each registration path must be configured separately if using more than one</b></p>		
<p><b>Somewhere in description or body of each</b></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>	<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>