Three Types of Events with Donations

	Fundraising Event	Free w/ Optional Donation	Standard Fees w/ Opt Donation
Key Configurations			
IMA	Configured at: *Event Information > Custom Fields > Payment Path* *Event Configuration > Fees > Merchant Account*		
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: *Event Information > Custom Fields*		
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 *-must be created in coordination with Karen Ichiba (and must request via TaskRay to add as option)*	Select Allocation Code for an Existing Fund *-eligible funds include those on giving.cu.edu or any current fund in Advance (must request via TaskRay to add as option)*	"N/A" *-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*
Allocation Code-old (text box) *-old field, deprecated*	ignore/leave blank	ignore/leave blank	ignore/leave blank

Required Contact Fields	Configured at: *Registration Settings > Select Registration Path > Contact Fields Tab* **-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 *-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)*	Required *-recommend using "Home Address" option*	Required *-recommend using "Home Address" option*
Phone Number	Required *-recommend using "home" and/or "mobile" phone options*	Required *-recommend using "home" and/or "mobile" phone options*	Required *-recommend using "home" and/or "mobile" phone options*
Address Fields settings *-these are recommended settings, and make reporting easier*	**Default Primary Address:** "Home" or "Work" (*see clarification in note for Full Address field*) **Invitees can select primary address:** "No" (*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.*) **Invitees can change their country:** "Yes" **Default Country**: "USA"	**Default Primary Address:** "Home" **Invitees can select primary address:** "No" (*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.*) **Invitees can change their country:** "Yes" **Default Country**: "USA"	**Default Primary Address:** "Home" **Invitees can select primary address:** "No" (*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.*) **Invitees can change their country:** "Yes" **Default Country**: "USA"
Optional Contact Fields	Configured at: *Registration Settings > Select Registration Path > Contact Fields Tab* **-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)
Required Questions	Configured at Website & Registration > Registration Questions		
Company should receive credit for the donation? *-already available as a question in the question*	Required **Add Questions From Library** - once selected make sure "Question" is selected as the library. Search for "company" and the question will appear.	Visible (not required)	Visible (not required)

library	**Make the question required** **Add question tag** - in the dropdown to the right of the question, select "Add Question Tag" and add the tag "Company Receive Credit"		
Optional Donation items	Configured at: *Agenda Items > Optional Items*		
Name	Official Fund Name followed by the allocation code in parenthesis Ex. *President's Opportunity Fund (#0821004)* *-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. *President's Opportunity Fund (#0821004)* *-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. *President's Opportunity Fund (#0821004)* *-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: ● **Official Fund Description** (as defined on giving.cu.edu or in Advance) ● **This text:** *"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."* **Example** (official description highlighted): *"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.* *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."*	At minimum, must contain the following: ● **Official Fund Description** (as defined on giving.cu.edu or in Advance) ● **This text:** *"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."* **Example** (official description highlighted): *"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.* *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."*	At minimum, must contain the following: ● **Official Fund Description** (as defined on giving.cu.edu or in Advance) ● **This text:** *"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."* **Example** (official description highlighted): *"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.* *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."*
All Other Agenda Items (not donation)	Configured at: *Event Details > Agenda Items* **-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. "*The Fair Market Value of food/beverage is $33.00 per person.*"	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	Configured at: *Event Information > Details > Description* *Registration Pages > Select Registration Path > Confirmation* *Event Emails > Registration Confirmation* **-for Confirmation Page, each registration path must be configured separately if using more than one**		
Somewhere in description or body of each	"*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.*"	"*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.*"	"*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.*"