

Where to Look:

ON A CONSTITUENT RECORD



Was constituent invited?
Communications tab
Filter by **Communication**:
Event Invitations

Did constituent RSVP or attend a specific event?
Must refer to **event record's**
Registrations tab

So what's on the Events tab of a constituent record?
Only shows events for which an RSVP was received

What is the best place to look for a constituent's most recent event-related activity?
Summary tab of the constituent record

ON AN EVENT RECORD



Access via the **Events** functional area at top; double-click on colored event bar on calendar to open event record or enter keyword and click magnifying glass to search (do not use *).

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Where can I find the invitation?
Documentation tab
Invitation is attached in this location so as to be visible to *both* UNF and university partners

I want to check RSVP for a certain constituent.
Registrations tab
Type [LastName] or [*FirstName] into **Registrant** field, then click **Apply** to filter

Who is on the invitee list?
Registrations tab

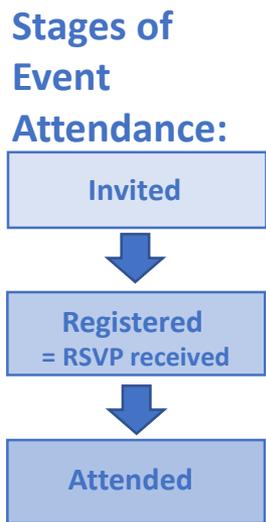
Who has RSVPd, and what is their response?
Registrations tab
Click **Status** column heading to sort by response type

How many people are coming?
Refer to **Will Attend** quantity listed in **Event capacity** section (upper right corner)

Who is planning or championing this event?
Tasks/Coordinators tab

Who attended?
Registrations tab, **Attended** column
(input after the event)

If Status displays:	The response indicates:
Registered	The individual WILL ATTEND.
Declined Canceled Will Not Attend	The individual WILL NOT ATTEND.
No Reply	Individual has NOT RESPONDED.



Anatomy of an Event Record:

18 UNF DWFI Donor Dinner in DC

Event date: 1/29/2018
 Site: University of Nebraska Foundation; University of Nebraska Institutes
 Location: The Fort Steakhouse Washington D.C.
 Room/Unit:
 Contact:
 Coordinator: Bougger, Admiral Annie E.
 Category: UNF

Event title at top; upper summary section provides event overview

Status: ✔ Active
 Lookup ID: 18DWFIDDDC

Event expenses
 Expense budget: \$0.00
 Agreed expenses: \$249.00
 Amount paid: \$189.50
 0% of budget

Event capacity
 Event capacity: 0
 Will attend: 46
 Will not attend: 1
 0% of capacity

This is a reliable number for projected attendees; other totals shown in Event capacity section are less precise.

Suggested tab order for event records (drag and drop to reorder):

← Registrations Tasks/Coordinators Documentation Invitations Expenses Options Speakers Appeals Job Occurrences Lodging Options Attributes Camp →

Registrations (87) + Add + More ▾

Searching for one particular RSVP? Enter either [LastName] or [*FirstName] then click **Apply** filter. Don't forget to click **Reset** after each search.

Type: Registrant: Apply ↺ Reset

Status: Attended:

<input type="checkbox"/>	Registrant	Type	Status ▾	Attended	Online registrant	Bala...	Host
<input type="checkbox"/>	◆ Smith, Robert	Invitation	Will not attend	No		\$0.00	Smith, Adrian M.
<input type="checkbox"/>	✔ Austin, Powers	Invitation	Registered			\$0.00	
<input type="checkbox"/>	✔ Badminton, Cham P.	Invitation	Registered			\$0.00	

A blue diamond ◆ next to a name indicates this person is a host and is bringing one or more guests.
 Guests are noted in the farthest right column titled Host.

RSVPs are in Status column; click the heading to sort and group similar responses.

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