



# Event management tutorial

*Before doing this tutorial, you should have completed the “Event Ticket Sales” tutorial.*

*This document will teach you how to use the **optional** Event Management module. Should your organization decide NOT to purchase this optional module, CharityMaster will only allow you to record the sale of event tickets and issue the related tax receipts.*

## Overview

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The Event Management module will assist you with:

- Managing a seating plan by automatically adding individual tickets sold to tables and entering sponsored tables.
- Maintaining additional information about ticket purchasers such as their seating and meal preferences.
- Managing the players in a golf tournament or curling bonspiel and their assignment to foursomes / rinks.

## Seating plans

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You can be running multiple events at the same time and each can have an associated seating plan. You can use the seating plan functionality to:

- Add corporate, complimentary and individual tables to the seating plan.
- Assign people buying individual tickets to tables and move them between tables
- Maintain additional information about ticket purchasers such as their seating and meal preferences
- Add and track complimentary tickets
- Help position tables at the event to ensure sponsored tables and tables with VIPs are appropriately recognized.

### Adding a seating plan

Once you have added the parameters for a new event to the system, you can add a seating plan to the event. Open the **Event Management** screen by clicking on the **Event Management** button on the menu bar at the top of the screen. Select the event to which you want to add a seating plan. (Note that you can only add seating plans to ‘Master events.’) On the “Seating Plan” tab, select the ‘**Has a seating plan**’ option and specify the standard and maximum table sizes. The standard table size controls the number of seats that are automatically added when you add a new table. The maximum table size controls the maximum number of people that can be seated at any table.

### The ‘Unassigned’ table

When you add a seating plan to an event, CharityMaster will automatically add a default “table” (labeled Unassigned”) to the seating plan. The purpose of the "Unassigned" table is to provide a place where you can 'park' people until you can assign them to a regular table. When individual ticket sales are recorded,

CharityMaster will add people to this table unless you specify another table. An unlimited number of people can be allocated to the 'Unassigned' table. To finalize the seating plan, you must always eliminate everybody from the 'Unassigned' table by moving them to other tables.

## Adding people to the seating plan

Regardless of whether or not you actually issue paper tickets, the CharityMaster assumes that numbered tickets will be created for each event.

There are three types of tickets that can be added to a seating plan. It is important to record the correct type of ticket so that you can reconcile your ticket sales with the number of people attending.

- **Individual (paid).** These tickets (or seats) are automatically added when you record the sale of individual event tickets. As you record the sale of individual tickets to the event, CharityMaster will automatically add a number of seats to the seating plan based on the number of tickets sold. People will be added to the "Unassigned" table unless you specify another table.
- **Sponsor table guests.** There are two ways to add this type of ticket to the seating plan:
  - By entering a "Gala - corporate table sponsor" on the **Add sponsorship history** screen. This will add a sponsored table and the standard number of seats.
  - By adding a person from the **Seating plan - manage** people screen. (Open the **Event Management** screen then click the **People at tables** button on the toolbar at the top of the screen.)
- **Complimentary.** These are tickets that are provided to the guest(s) of honor or in exchange for the provision of some benefit to your organization. Complimentary tickets can be entered as follows:
  - By entering a complimentary ticket sale on the **Sell event tickets** screen, or
  - By adding a person from the **Seating plan - manage** people screen. (Open the **Event Management** screen then click the **People at tables** button on the toolbar at the top of the screen.)

### Entering people's names

Generally, when seats are added to the seating plan, the last name of the person who will occupy the seat is set to 'TBD' and the first name is left blank. In order to develop the list that shows people the table at which they are to be seated, you must replace all of the 'TBD' names with the names of everyone who will be attending the event. See "Finalizing the seating plan" below.

## Adding tables to the seating plan

There are three types of tables that can be added to a seating plan:

- **Standard tables** - for either individual {paid} ticket holders or individually issued complimentary ticket holders.
- **Corporate (or sponsored) tables.** All tickets at a sponsored table are of the "sponsor table guest" type.
- **Complimentary tables** - a complete table that is provided in exchange for the provision of some benefit to your organization. All tickets at a complimentary table are of the "complimentary" type.

### Standard tables

Standard tables can be added in one of two ways:

- When recording the sale of individual event tickets on the **Sell event tickets** screen.
- By adding a table from the **Seating plan – manage tables** screen. (Open the **Event Management** screen then click the **Manage tables** button on the toolbar at the top of the screen.)

### Corporate tables

A corporate table is one that has been paid for by a sponsor. Corporate tables can be added in one of two ways:

- Enter a corporate table sponsorship using the **Add new sponsorship record** screen. If you select the “Gala - corporate table sponsorship” type, the system will automatically add a table with the standard number of people. The table name will be the name of the company. The people sitting at this table will all have 'sponsor table guest' tickets.
- By adding a table from the **Seating plan – manage tables** screen. (Open the **Event Management** screen then click the **Manage tables** button on the toolbar at the top of the screen.) It is essential that you indicate that you are adding a “Sponsored” table when you add a table so that all of the tickets types added will be the appropriate type.

### Complimentary tables

Complimentary tables are provided to donors such as those who give major auction items. Add a table using the **Seating plan – manage tables** screen. (Open the **Event Management** screen then click the **Manage tables** button on the toolbar at the top of the screen.) When a complimentary table is added, the standard number of people will also be added and all the people sitting at this table will have 'complimentary' tickets.

## Managing total attendance

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Open the **Event Management** screen then click the **Seating Plan Summary** button on the toolbar at the top of the screen. The **Seating plan summary** screen shows the total number of tickets that have been entered into the seating plan. Compare this with the maximum attendance (which was set on the **Event setup** screen → Seating plan tab.)

## Finalizing the seating plan

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In order to finalize the seating plan, you must:

1. Ensure that the names of everyone attending are entered and that menu and other preferences are added.
2. Move everyone from the ‘Unassigned’ table., and
3. Number / renumber / rename the tables.

### Edit ‘people’ information

Open the **Event Management** screen, then click the **People at tables** button on the toolbar at the top of the screen. Select the person whose info you want to edit then click the **Edit person** button. Here you can change:

- The ticket number (to one that has not already been assigned.)
- Change the first and / or last names
- Add remarks (such as seating preferences), or
- Add a special meal request (e.g. vegetarian) or record their choice of entrée.

You can also add information about any meal preferences / allergies so that a special meal can be served to that person. If you offer attendees a choice of entrées, you can enter the list of choices (click the **Manage menu** options button on the **Seating plan** summary screen) and then record each person's choice on the **Seating plan – manage people** screen. There are two reports available to help you manage menu choices – both of which show the table number and table name:

1. Names grouped by meal preference and
2. Names showing menu preference.

If a golf tournament / curling bonspiel is connected to the same event, any changes that you make to a ticket number or to a person's first or last name also will be made in the tournament plan.

### Move people from 'Unassigned' table

Open the **Event Management** screen then click the **People at tables** button on the toolbar at the top of the screen. The **Seating plan – manage people** screen will open. Select the "Unassigned" table from the drop down list at the top of this screen.

Select the person you want to move then click the **Move person** button. On the screen which appears, select the table to which you want to move the person (seat) from the drop down and then click the **Move person to selected table** button. You can only move one person at a time and you cannot move a person to a table that already has the maximum number of people at it.

Continue until you have moved everyone from the "Unassigned" table.

### Numbering and arranging tables

CharityMaster can automatically number the tables for you or you can assign numbers to each table yourself. Open the **Seating plan – Manage tables** screen by clicking on the **Manage tables** button on the 'Event management' toolbar.

Use this screen to add and delete tables, to edit the names of tables and to number or renumber all of the tables.

A regular or complimentary table can be flagged as a 'VIP' table. This flag will show up on the **Floor planning** report to facilitate locating tables on the floor plan.

Use the Notes button to enter any information about the table. The notes are shown on the **Floor planning** report.

### Reports

The following reports are available:

- Guests by last name. This lists all people in the seating plan (excluding those who are still 'TBD') and it can be posted at the entrance to your venue to direct people to their table.
- Names which are still 'TBD' Use this report to determine who you have to contact to get the names that will appear on the list of guests. All of the names should be entered and everyone moved off of the "Unassigned" table before you run any of the remaining reports.
- Table numbers

- Names in ticket number order
- Complimentary tickets
- Names at each table
- Floor planning
- Names grouped by meal preference and
- Names showing menu preference.

## **Golf tournaments / curling bonspiels**

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You can be running multiple events at the same time and each can have an associated tournament / bonspiel. You can use the tournament functionality to:

- Add foursomes / rinks
- Assign people buying individual tickets to foursomes / rinks and move them between foursomes / rinks
- Maintain additional information about ticket purchasers such as their position in the rink
- Add and track complimentary tickets
- Help schedule games in a bonspiel or schedule the starting order / hole for each foursome

The functionality in CharityMaster is the same for both a golf tournament and a curling bonspiel: only the labels on screens and reports change depending on the setup of the tournament. Since the setup and operation of a tournament is essentially the same as for a seating plan, we will not cover golf tournaments / curling bonspiels in this tutorial.

*WE HOPE YOU ENJOYED THIS TUTORIAL. ALL OF THIS INFORMATION IS ALSO AVAILABLE IN THE CHARITYMASTER HELP SYSTEM. PRESS THE F1 KEY ON ANY SCREEN TO GET THE INFORMATION YOU NEED.*