



TO BE FILLED OUT BY DATABASE ASSOCIATE:

Check box when done

Appeal ID assigned in RE: _____

Date finished: _____

Staff Initials: _____

EVENT SET-UP REQUEST FORM

Use when you need an event to be added in Raiser’s Edge

When there is a special fundraising event [ie. Annual Gala] or an event that need to be tracked for ticket sale/invites in Raiser’s Edge, it needs to be set up in Raiser’s Edge by Database Associate. Please fill out the information below and submit it to Database Associate. You must submit Event request form at least **4 weeks before** an event takes place or tracking need to start in Raiser’s Edge for that event. This gives Database Associate enough time to set-up an event, pull invite lists and have you proof it before an event takes place and tickets/invites are tracked in Raiser’s Edge.

DATE REQUESTED: _____

STAFF PERSON MAKING THE REQUEST: _____

DATE YOU NEED AN EVENT SET-UP IN RAISER’S EDGE: _____

INFORMATION NEEDED FOR RAISER’S EDGE:

- a. Event Type: Sporting Event Dinner Class Other
- b. Department/Area that is overseeing the scheduled event: _____
- c. Event Description: _____
- d. Event Coordinators: _____
- e. Event: Start date and time: _____ End date and time: _____
- f. Capacity (this is the maximum number of people that can participate in the event): _____
and Location: _____
- g. Event Expenses to track in Raiser’s Edge? Yes No If yes, provide details below.

Expense Type	Budgeted Expense Amount
_____	_____
_____	_____

***You’ll need to provide actual expense details to Database Associate after the event to track it in Raiser’s Edge*

h. Tickets – Are you selling tickets for the scheduled event?: Yes No

i. If yes, provide details of types of tickets and price for each

Ticket Type	Ticket Price
_____	_____
_____	_____

i. Are participants getting a tax-receipt for a portion of their ticket purchase after event expenses are finalized? Yes No

i. If yes, expected date of final receipt value information to Database Associate:

j. List pull required from Raiser' Edge for event invites? Yes No

i. If yes, please submit Data Request Form no later than **one week after** Event Request Form is submitted.

k. Expected date of Data Request Form to Database Associate: _____

l. Are you going to track event invites and responses through Event module in Raiser's Edge?

Yes No

i. If yes, please submit final list of event invitees to Database Associate using import templates no later than **two weeks after** Event Request Form is submitted.

m. Expected date of list of event invitees to Database Associate: _____

n. GL account code this event links to (**this is imperative when setting up an event for which you are selling tickets or getting sponsors for**): _____ (if not sure about GL account code, discuss with Database Associate or Accounting)

o. **Any other Notes/Special Instructions for this event:**
