

# Events Overview

Managing your Events is now easier than ever to create and track. The **Event Overview** section will go over the following functions:

- Creating, editing and tracking an (#creating an event) **Event**
- Adding slots/jobs to your event (#adding jobs to events)
- Assigning users/people to a job (#assigning users)
- Emailing Events (#emailing events)

## Creating a New Event

1. Click on **Add New Event** to create a new event. A pop up will appear allowing you to customize your event. Go through each tab to complete this event.

The screenshot shows a web form titled "Your message Event, Edit [130]". At the top, there are three tabs: "Event Info", "Event Settings", and "Event Extra". The "Event Info" tab is highlighted with a red box. A red arrow points from the text "3 tabs to complete for event" to the "Event Extra" tab. Below the tabs, the form contains several fields:

- Event Name \***: Text input field with the example text "Example: 'Run The Grill' / 'Bring Cookies'".
- Event Description**: Text area with the example text "Example: I'll be bringing a ton of hotdogs and hamburgers. I just need someone to run the grill and cook all of the food! Must be an experienced cook."
- Start Date \***: Date picker field.
- End Date \***: Date picker field.
- Start Time**: Text input field with "optional" and a clock icon.
- End Time**: Text input field with "optional" and a clock icon.
- Event Type \***: Dropdown menu with "Please select" and a downward arrow.

At the bottom of the form, there are three buttons: "Save & Add New Job" (blue), "Save" (blue), and "Cancel" (grey).

### 2. Event Info Tab:

- a. **Event Name** - Type in your event name (example: Bake Sale, Car Wash, End of School Dance, etc.)
- b. **Event Description** - Optional: Provide additional details of this event if needed (this will be visible to anyone viewing the event)
- c. **Start/End Date** - Type in the start and end date of the event or click on the calendar icon

- d. **Start/End Time** - Type in the start and end time of the event or click on the clock icon.

e. **Event Type**

- **One Time** - Select this option if this event is only occurring one time
- **Recurring** - Select this option if the event is a recurring event (example: weekly PTA meetings, monthly bake sale, etc). Additional fields will populate so you can customize the recurring event.
  - Recurring Type** - Select from the drop down if this event is daily, weekly, monthly, yearly
  - Recurring Ends** - Provide an end date for this event
  - Recurring Every** - Depending on the Recurring Type you selected, the drop down option will update so you can determine how frequently this event should occur.

3. **Event Settings Tab:**

- a. **Location** - Add location details of this event
- b. **Collect RSVP** - Have the ability to track how many people will attend this event
- c. **Timezone** - Select the timezone of this event
- d. **Private Notes** - Additional notes only the event organizer can view
- e. **Publish** - Use this to make the event public to users

4. **Event Extra Tab:**

- a. **Jobs Require Approved Volunteer** - Check this box if your organization requires approval (background check, certification, etc) for a volunteer to sign-up
- b. **Auto Approve Volunteer Hours** - Check this box if all volunteer sign-ups can be approved without the event organizer review
- c. **Event Contacts** - Type in a contact name and they will appear in the drop down. The event person(s) will be listed as the main contact for the event on the event details page.

5. Click **Save & Add New Job** if this event is asking for volunteers (if no volunteers, click **Save**)

6. The main page will now display the details on the event you just created. You can always click on the **Edit Event** to update your event.

The screenshot shows the 'Event' details page. On the left, there is a calendar icon for June 9th (Friday) with a green 'Event Published' badge and a green 'Event in 4 Days' badge. The event details are as follows:

- Event:** Bake Sale
- When:** Friday 2:00 pm ~ Friday 4:00 pm
- Where:** Auditorium
- Additional Details:** Collecting RSVP
- Event Contacts:** Ashby Crutchfield
- Event URL:** <https://atozdirectories.com/events/wha9185>

On the right side, there are two buttons: 'Edit Event' (with a red arrow pointing to it) and 'Compose Email'.

## Adding slots/jobs to your event

1. Click on **Add New** under the **Slots/ Jobs** tab to create jobs for your event.

The screenshot shows the 'Slots / Jobs, Add new' form. The form is titled 'Slots / Jobs, Add new' and has a close button (X) in the top right corner. Below the title, there is a message: 'Adding a job to your event is easy. Select the type of job, give it a title then select how many people are needed for each job.'

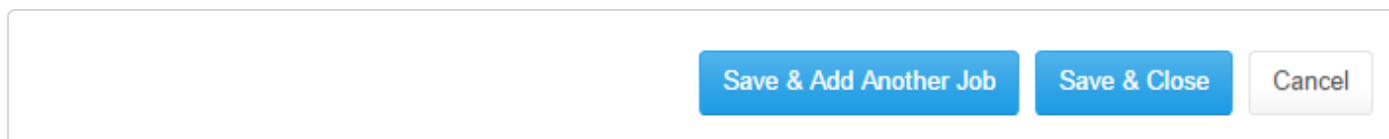
The form has two tabs: 'Slot / Job Detail' (highlighted with a red box) and 'Slot / Job Signups'. The 'Slot / Job Detail' tab contains the following fields:

- Slot / Job Type \***: A dropdown menu with 'Please select' and a help icon (?).
- Slot / Job Title \***: A text input field with the example text: 'Example: "Run The Grill" / "Bring Cookies"'. There is a help icon (?) to the right.
- Slot / Job Description**: A text area with the example text: 'Example: I'll be bringing a ton of hotdogs and hamburgers. I just need someone to run the grill and cook all of the food! Must be an experienced cook.' There is a help icon (?) to the right.
- People Needed**: A text input field with the value '1' and a help icon (?) to the right.
- Slot / Job Date \***: A date input field with the value '09/15/2017' and a calendar icon to the right.
- Time Specific**: A checkbox that is currently unchecked.
- Hours Earned**: A text input field.

At the bottom of the form, there are three buttons: 'Save & Add Another Job' (blue), 'Save & Close' (blue), and 'Cancel' (grey).

2. **Slot/ Job Detail** tab  
 a. **Slot / Job Type**

- **Multiple Time Slots** - This will create multiple single time slots (additional fields will populate so you can specify how long each time slot should be within the range of the event)
  - **Single Time Slots** - Creates a single time slot for this job
- b. **Slot / Job Title** - Create the appropriate title for this job
  - c. **Slot/ Job Description** - Add additional details of this job in this field
  - d. **People Needed** - Select how many volunteers are needed to complete this job
  - e. **Slot / Job Date** - Update the appropriate day for this job
  - f. **Time Specific** - Enter the time this job should be completed
  - g. **Start/End Time** - If time specific is checked, these fields should be filled out so the volunteer can know when they are needed
  - h. **Hours Earned** - Based on the start and end time, this field will populate how many volunteer hours are earned (you can override these number if necessary)
3. **Slot/Job Sign ups** tab
- a. Click on **Add New** to add a volunteer to a job
    - **Type** - Select what kind of user is being signed up for this job. The **Person** drop down will then populate the users based on the **Type** selected.
    - **Person** - Start typing the name of the user that you are manually assigning to this job. You can also go through the drop down to see the list of users.
    - **Notes** - Add additional notes for this volunteer
    - **Hours Earned** - Type in how many hours a volunteer can earn for doing this job
    - **Visibility** - Select from the drop down to hide or make this volunteer assignment visible to other users
4. Click **Save & Add Another Job** if there are multiple jobs for this event or Click on **Save & Close** if all jobs have been created



The image shows a horizontal bar containing three buttons. From left to right: a blue button with white text 'Save & Add Another Job', a blue button with white text 'Save & Close', and a light gray button with black text 'Cancel'.

**NOTE:**

Clicking on **Cancel** will delete the entire job.

5. The main **Events** page will list the jobs created and provide an update on how many people signed up for each job
  - a. Click on the **Edit** icon if you need to edit the details of this job

b. Click on the **Copy** icon to duplicate this job

Slot / Job Type	Slot / Job Title	Start Time	Slot / Job Date	People Needed	Status
Single Time Slot	Front Desk	No	Sep 15th	have 0 of 1	OPEN
Single Time Slot	Cashier	No	Sep 15th	have 0 of 2	OPEN
Single Time Slot	Bringing Cookies	No	Sep 15th	have 0 of 3	OPEN
Single Time Slot	Bring Pies	No	Sep 15th	have 0 of 3	OPEN

6. The **Status** column will update based on users signing up for the jobs or if you manually assign a job to a user (see below)

## Assigning Users/People to a Job

1. Admins can manually assign users to each event job.
2. At the **People** tab, click on the **Add New** button to assign a job.

**People, Add new**

**Type \*** Parents

**Person \*** Please select

**Response** Please select

Assigned Slots / Jobs

Save Cancel

3. **Type** - Select from the drop down the type of user you are assigning to this job
4. **Person** - This drop down will populate the list of users based on the Type you selected. You can also start typing the users name if you know who you are assigning to this job.
5. **Response** - This field will appear if you are tracking RSVPs (set up when event was created). Select from the drop down if this user is attending the event
6. **Assigned Slots/Jobs** - Click on Arrow icon to expand this section to assign a job to this user
  - a. **Event Job** - The jobs that were created for this event will appear in the drop down.
  - b. **Notes** - Add additional notes for this user to view (example: additional instructions for this job)
  - c. **Hours Earned** - Based on the hours earned for this job when it was created, this field will populate the amount of volunteer hours earned. You can manually override this number.

d. **Visibility** - Select from the drop down if you want to hide and make the assigned job visible to other users viewing this event

7. Click **Add New** if you want to assign multiple jobs to this user for the event

Assign Slot / Job To This Person **Add new** **Cancel**

Event Job  OPEN-Cashier (2:00 PM ~ 4:00 PM) - Jun 9th

Notes

Hours Earned 2.00

Visibility Hide my name from other participants

**Save** **Cancel**

8. Click **Save** when you are done assigning jobs to this user

## Sending an Email about an Event

After you have completed the event details and jobs, you can send this event out to your users. This email will also include the unique link for the users to quickly view.

1. On the main page of the event, click on the **Compose Email** button to start your email.

Event

June 9 Friday  
Event in 4 Days  
Event Published

Event: Bake Sale  
When: Friday 2:00 pm ~ Friday 4:00 pm  
Where: Auditorium  
Additional Details: Collecting RSVP  
Event Contacts: Ashby Crutchfield  
Event URL: <https://atozdirectories.com/events/wha9185>

Edit Event  
**Compose Email**

- A pop up will appear asking if you want to select your own recipients or just to a specific group. Choose the appropriate option for your email then click on **Compose New Email**.

## Compose Email with Event Link Now?

- General Email (I will select recipients )
- People With Assigned Jobs
- People Who Responded Yes

COMPOSE NEW EMAIL
CANCEL

- You will now go through the steps of created your email and selecting your recipients (see Email (<https://atozdirectories-v2.helpscoutdocs.com/article/288-compose-email?preview=584eff61c697912ffd6bd188&auth=true>) article for more information) **Remember:** the body of your email will have the link for your recipients to view this event.
- Once the email has been sent, the system will send you back to the main page of your Event.
- Click on the **Emails** tab to view the email details.

From Email	Reply To	Subject	Email Stats Summary	Created On	Created By	Status	Sent On
DemoElementarySchool@atozdirectories.com	ashby@atozdirectoryapps.com	Event test		6/5/2017	Mike Schoen	Sent	6/5/2017

- The recipients will also be listed under the **People** tab.

✉ [Still need help? Contact Us \(/contact\)](/contact)

*Last updated on July 26, 2017*

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