



TELOS
SOFTWARE

Premier Special Topics Cheat Sheet

Event Planning

- Event Codes, when created, show up on the Actions tab of the Master Bio screen and also on the Gift screen
- You can setup the Capacity, the Cost, the Goal and the Date of the Event
- Groups relate to the specific kind of grouping for an Event – e.g., Tables, Teams, Foursomes, etc.
- Invites for an Event are done through the Mailing screen and an Action should be globally added to each person invited in order to keep track of the invitees RSVP Status
- The Event Manager screen can be accessed from the Tasks Menu or from the Actions Tab
- Use the Event Manager to quickly change the RSVP status as responses come in and to make table or other group assignments
- The Assign Groupings screen can be accessed from the Tasks Menu, from the Actions Tab or from the Event Manager
- The Assign Groupings screen allows you to quickly make table or other group assignments
- You can print Name Badges directly from the Assign Groupings screen
- Donations for the Event – tickets, auction items purchased, etc – are added into the Gift screen
- You can link an RSVP to a specific donation, either from the attendee or from someone else
- You can make the link from the Event Manager screen, from the Actions tab in the Bio screen, or from the Gifts and Pledges screen
- If someone who was not invited – and therefore doesn't have an Action attached to them – pays for attendance to the Event, you can automatically enter an Action for them when entering the donation
- You can access many Event features from the Events selection in the Navigation screen
- You can then run a number of reports related to your Event, such as Event Group Assignments, Event RSVP List, Events Statistics and Event/Reason Report