CBS USER MANUAL

EVENT MANAGEMENT MODULE

The **Event Management Module** is a comprehensive tool designed to streamline the entire lifecycle of event-related activities within an organization. It aims to simplify the creation, management, and execution of events by offering a user-friendly interface and robust features. This module enables users to handle complex event-related processes with accuracy, efficiency, and improved communication. Here's a detailed breakdown of its capabilities:

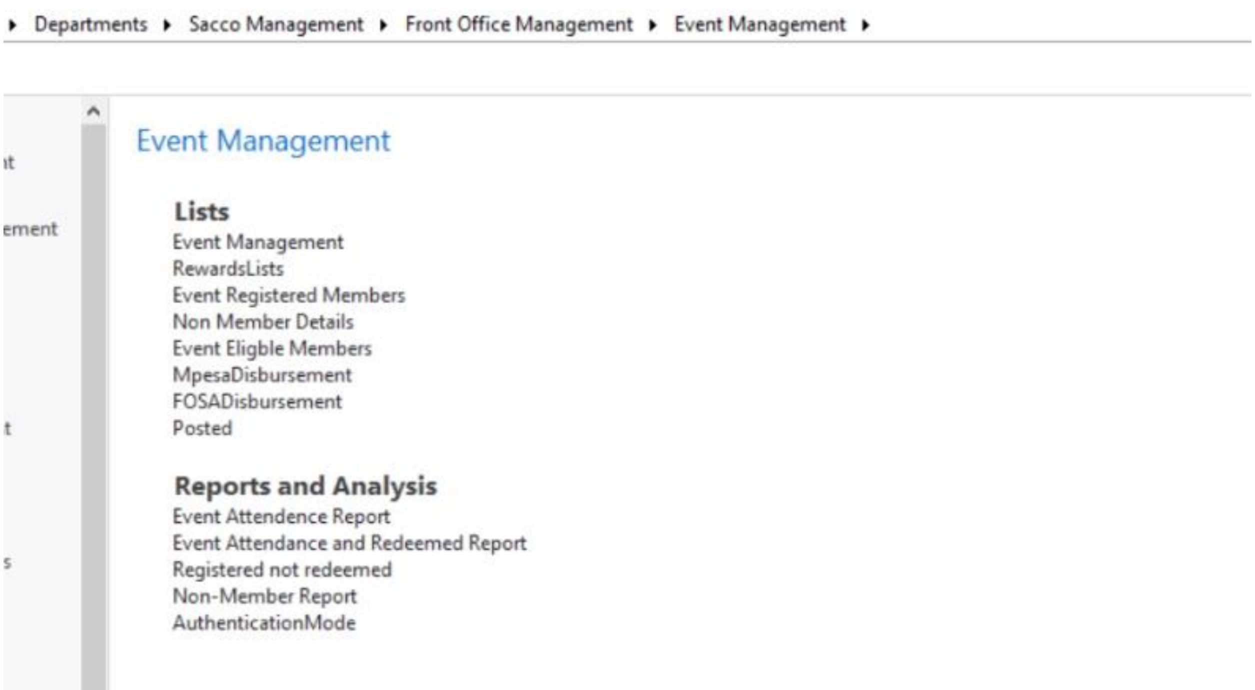
Key Objectives of the Event Management Module

1. **Ease of Use**: Provides an intuitive platform to manage all aspects of events, from planning to execution.
2. **Efficiency**: Reduces manual efforts by automating key processes like participant management and disbursement of rewards.
3. **Accuracy**: Ensures precision in data handling, especially during member registrations and financial disbursements.
4. **Communication**: Facilitates effective communication with participants via integrated SMS notifications.

Accessing Event Management

To navigate to the event management module, follow the detailed steps as explained below:

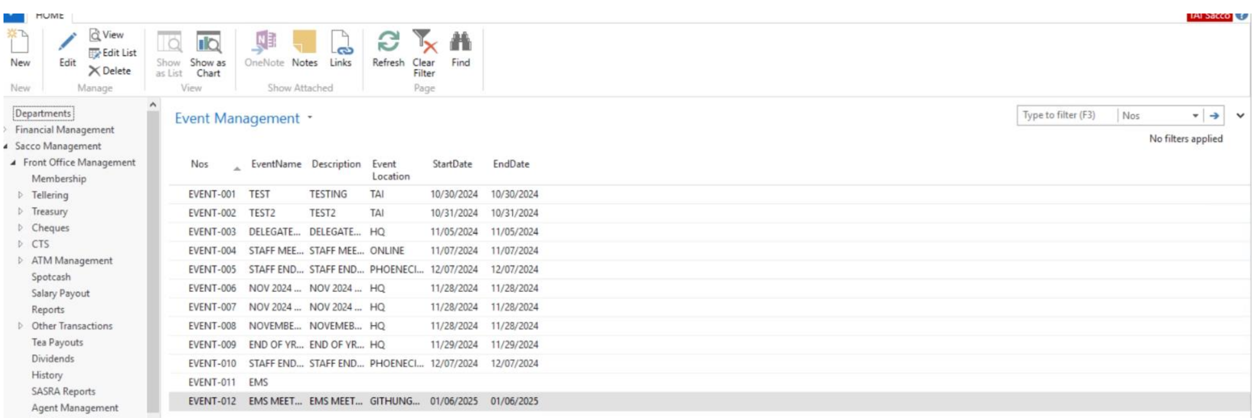
1. Navigate to the **Front Office Management** section.
2. Click on the **Event Management** tab. The Event Management interface will be displayed as shown



1 Event Creation

Creating a New Event

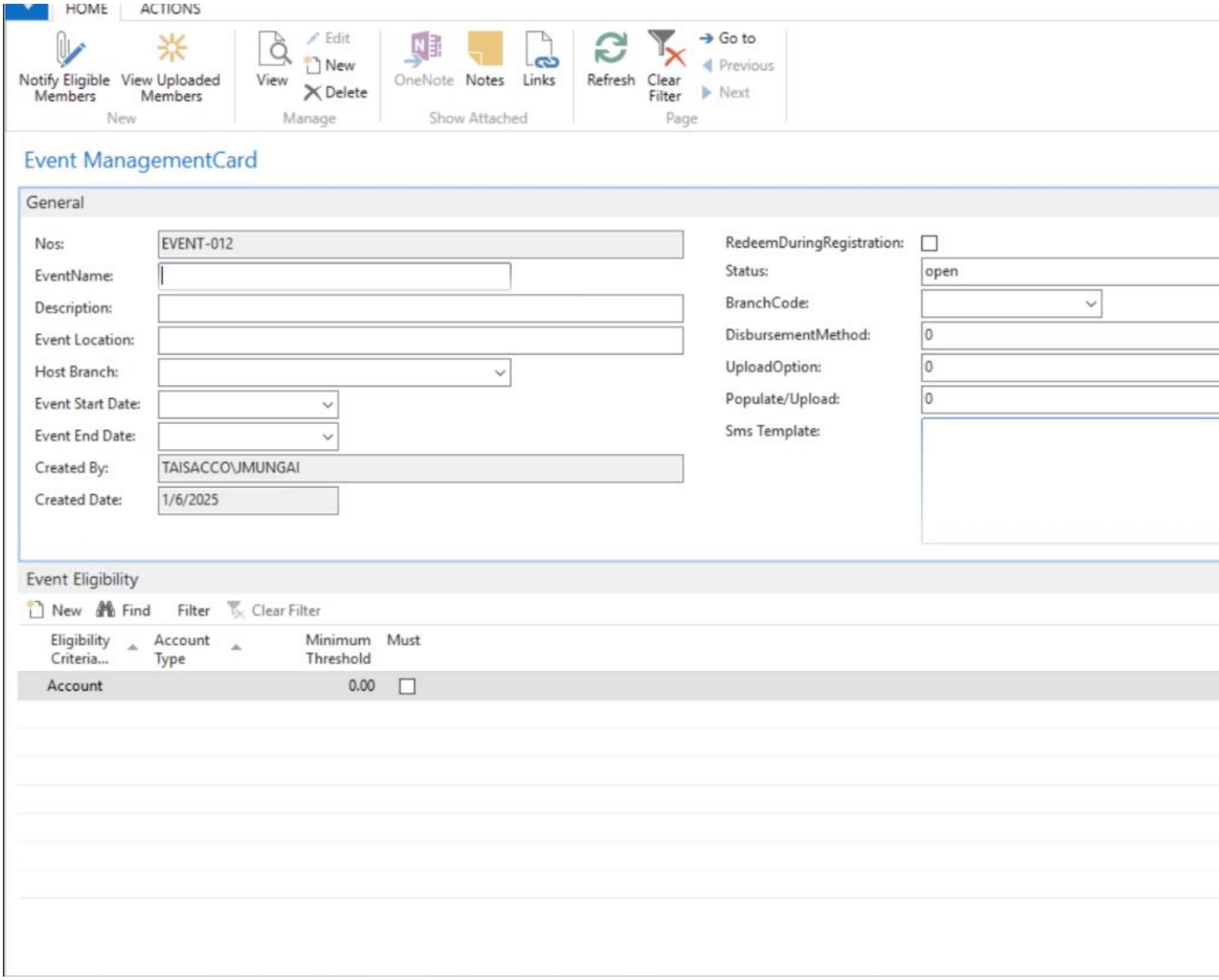
To create a new event navigate to the Event management and click on a list will be displayed as shown, this shows a list of all events already created.



To create a new Event follow all the required steps as detailed below.

1. Click the **New** tab to create a new event.
2. A form will appear where you can fill in the event details, including:
    - Event Name
    - Start Date
    - End Date

- Other relevant details



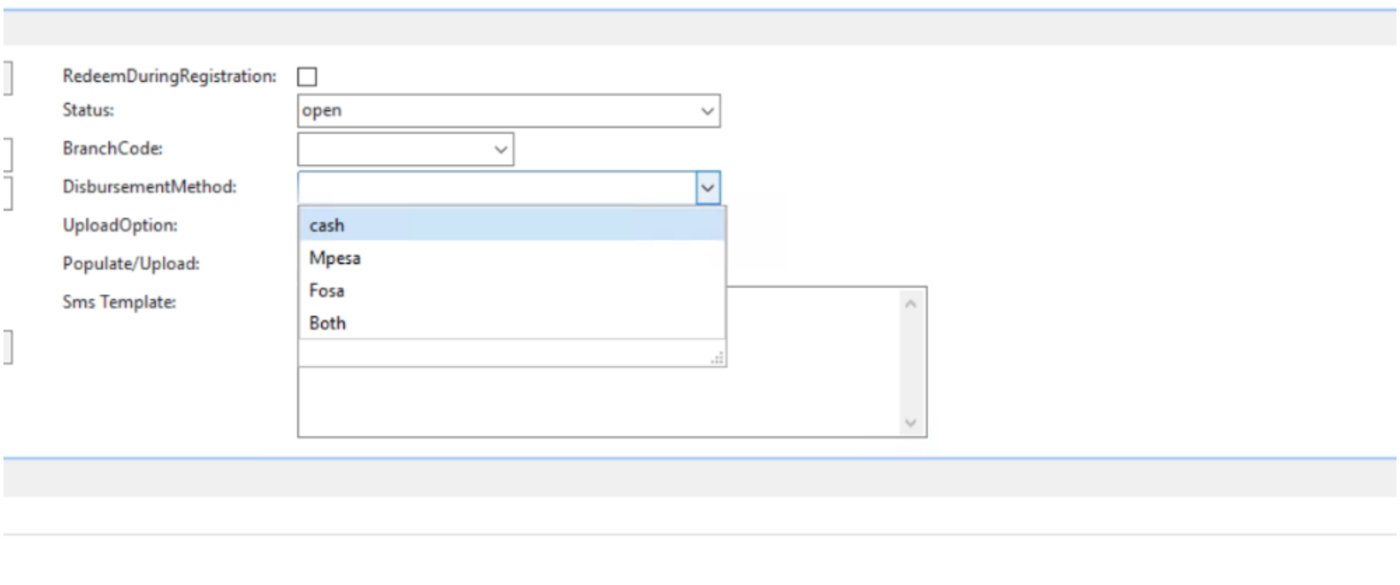
Specifying Disbursement Mode

In each an every event if we have a reward attached to it, we have to specify the mode of disbursement for that specific reward to do that we do as follows:

1. After entering event details, choose the disbursement mode for the event. Options include:

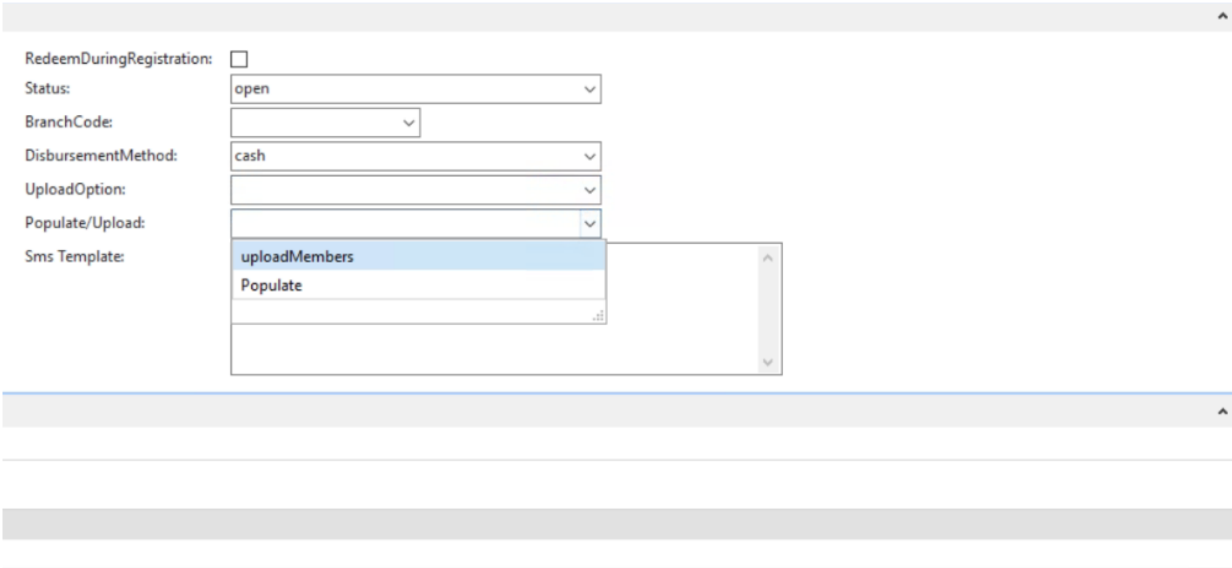
- **Fosa**
- **Mpesa**
- **Cash**
- **Both**

2. Select the appropriate disbursement mode as needed.



Adding Eligible Members

Eligible members can be added using one of the following methods:



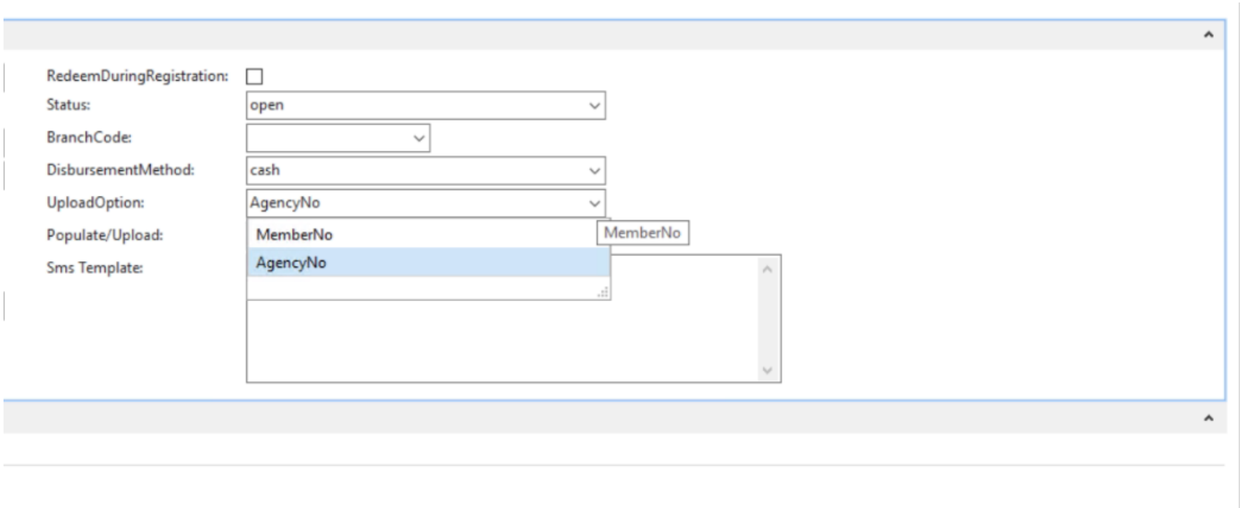
Manually Populate Members

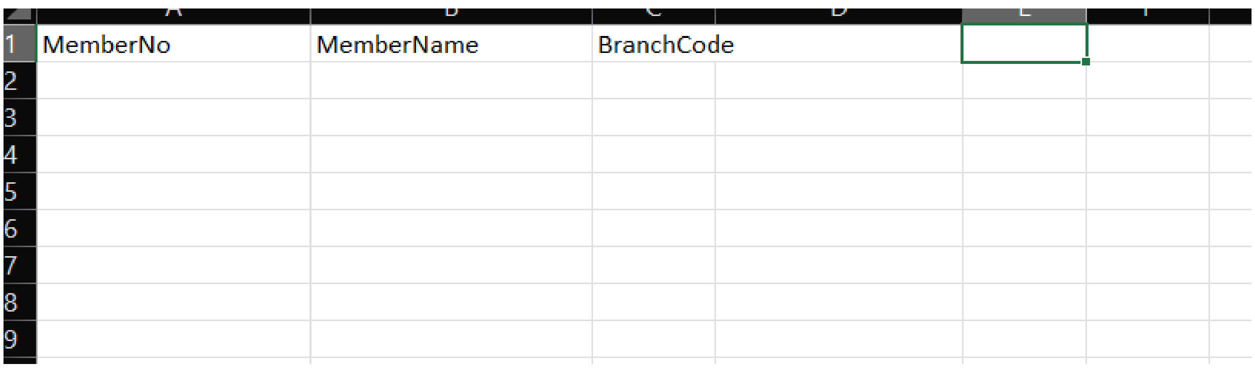
This is accomplished by using the eligibility criteria specified either Member shares must be of a minimum of Ksh 1000.

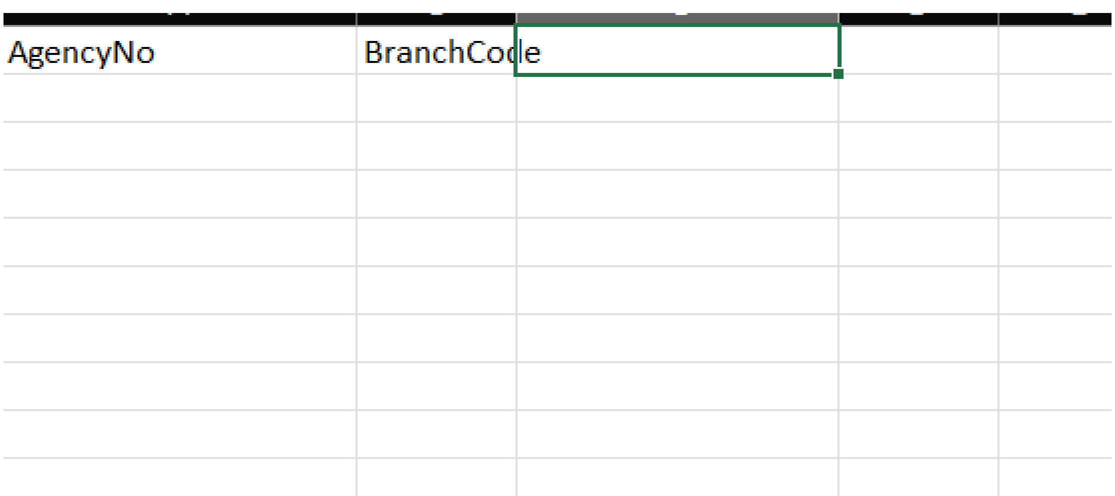
Upload Members Using a CSV File

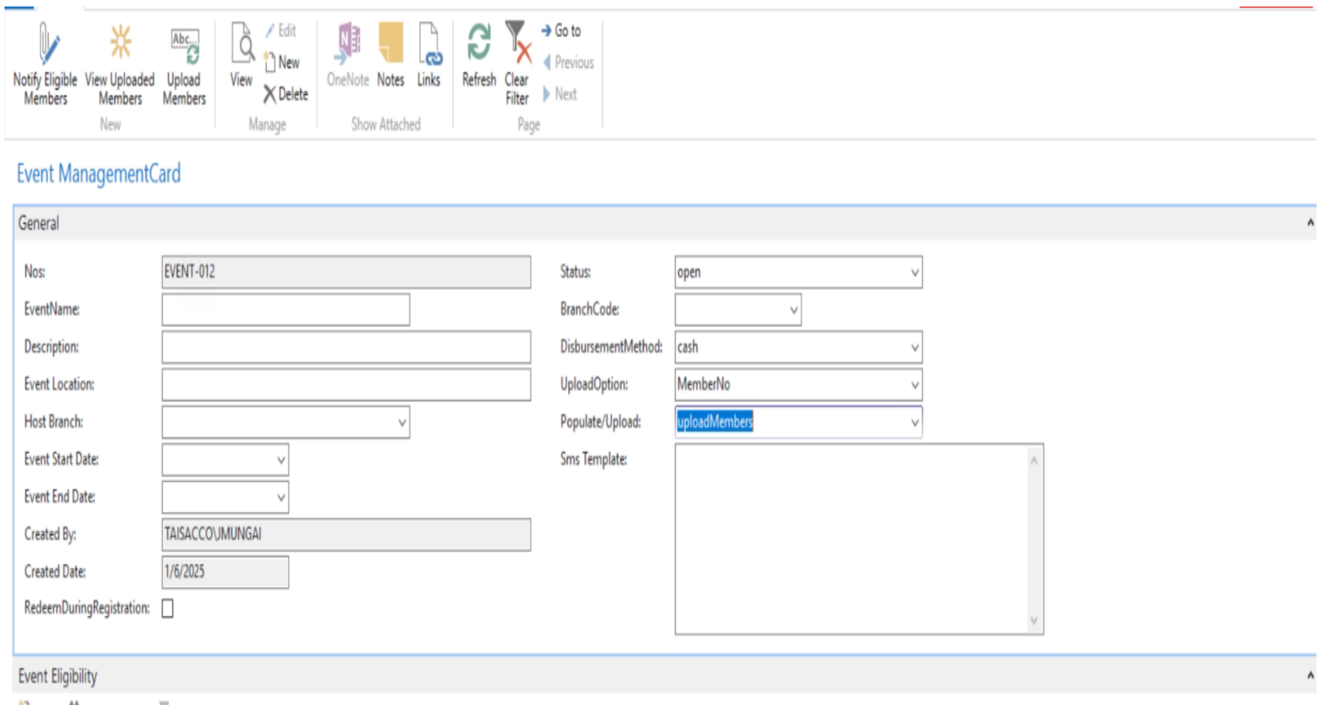
This can be accomplished by following the steps outlined”

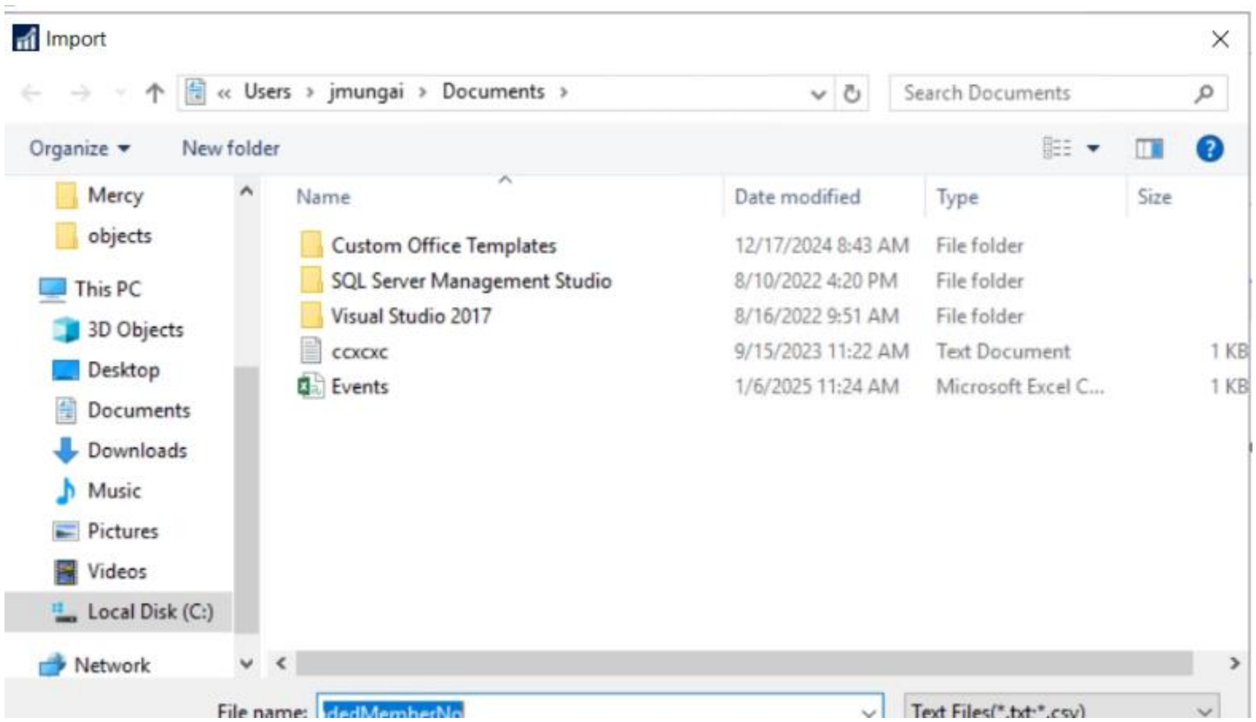
1. **Prepare a CSV file using one of the following formats:**
    - **Using Member Number (memberNo): Include a column for the member numbers.**
    - **Using Agency Number (agencyNo): Include a column for the agency numbers.**
2. **Click the Upload Members button.**
3. **In the popup window, select the CSV file and click OK.**
4. **The system will validate and upload the data.**


RedeemDuringRegistration:
Status:
open
BranchCode:
DisbursementMethod:
cash
UploadOption:
AgencyNo
Populate/Upload:
MemberNo
AgencyNo
MemberNo
Sms Template:


1
MemberNo
MemberName
BranchCode
2
3
4
5
6
7
8
9


AgencyNo
BranchCode



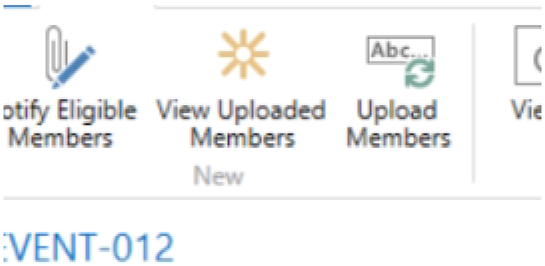


Viewing Uploaded Members

After an upload is complete you can view all member uploaded by following the steps outline:

1. Click the **View Uploaded Members** button.

2. A display of the uploaded members will appear, showing the details of the members added to the event.

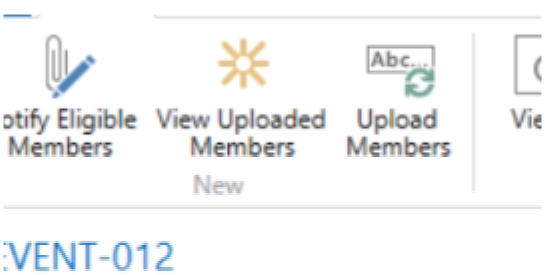


Notifying Eligible Members

We also have the SMS template as displayed whereby a user can stage the SMS to send to the eligible members.

This can be accomplished as follows

1. After creating the event, uploading eligible member details and creating a message template click **Notify Eligible Members**.
2. The system will send an SMS notification to all eligible members automatically.



2 Reward Module Management

This module deals with the token that will be given on the event date. To set it up navigate to the reward list and click it. Then a list will be displayed.

Create a new Rewards

1. Click New tab a card will open.
2. Select the event (it will be a drop down) you want to setup the reward for.
3. Setup the specified rewards attached for the event such as the name, type is its either cash or an item.
4. For cash rewards:
    - Specify the **G/L or bank account** for posting.
    - Enter the **total reward amount**.

Once that is done click okay and it will be saved automatically.

3 Event Registered Members

This module displays a list of registered members through the agency device. To navigate to that module, click on the event registered members and a list will be displayed. From that list the following action is performed:

Updating Member Amounts

1. If cash rewards are involved, prepare a CSV file with the updated amounts for registered members.
2. Click **Update Amount** to upload the file and modify the amounts.

Non-Member Details

To view the non-members registered navigate through clicking the non-member tab to open list.

1. Non-members can be added using:

- A device during the event.
- The **Upload Non-Member** button.

3 Event Eligible Member

Displays all the eligible members of the event. You can navigate by clicking the event eligible tab to view the list.

1. The system displays:
    - Member details.
    - SMS delivery status (sent or not received).

4 Mpesa/Fosa Disbursement

You can navigate to the mpesa and Fosa list Tab by clicking on it.

The module entails:

1. Viewing members whose disbursement modes are **Mpesa** or **Fosa**.
2. Verifying disbursement amounts.
3. A designated user posts and disburses funds to members' accounts.
4. Verifying posted details in the **Posted List** tab.

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5 Reporting

This module allows the user to generate the report. You can navigate to the report by clicking on it.

Reports can be generated by:

1. Selecting the desired filters.

2. Clicking **Preview** to view the report.
3. Exporting the report to PDF or Excel as needed.

Conclusion

The Event Management module provides robust tools to efficiently create events, manage participants, specify disbursement modes, and generate reports, ensuring streamlined processes and enhanced user experience.

This module streamlines event management by providing efficient tools to create events, manage disbursement modes, and add eligible members.