MONEY SMART WEEK

USER MANUAL FOR

PARTNER SIGN UP & ENTERING EVENTS
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1. **INTRODUCTION**

The purpose of this user manual is to guide user with the steps to follow when user sign up as Partner and enter the events on the Money Smart Week Website. The user must be a Partner before registering the Event in the system.

2. **SIGN UP AS PARTNER**

To sign up as partner the user will go to Money Smart Week Website, the URL for the website is [https://www.moneysmartweek.org/](https://www.moneysmartweek.org/).

On top right side; Click on the Menu About and click Become A Partner option. As shown in the screen shot below:
The direct web link to **Become a Partner** is below:

https://www.moneysmartweek.org/partners_signup

The screen shot for Sign up as a Partner is below:
There are 2 pages to sign up as Partner. On the first page the user will enter all the mandatory fields such as **First Name, Last Name, Phone** and **Email** and click **NEXT** Button as shown below:

On the second page the user will fill required information such as **“Are you a Member of One of these Organization”** the user selects it then the user will enter further details about it like **Company, Job Title & Type of Organization.**

The user will then select **preferred Topics** and **Preferred Audience** and select **Agree to Terms** button as shown below:
The user will click **I Agree** for the agreement of the terms as shown below:

Once the terms are agreed the user will be routed to the previous page where the user will click **Become Partner** Button as shown below:
After clicking **Become A Partner** the user can either post on social media or can skip it by clicking **No Thanks** option as shown below:

![Image of Become A Partner option]

### 2.1. **Account Activation**

When the user will become partner, the user will receive an email to **Activate the Account**. User can get any of these messages to check the email for **Account Activation**. The screenshot for both messages are below:

![Image of Activate Your Account message]

![Image of Link in the email message]
The activation code will be sent to the email that was used at time of signing up as Partner. The user will click that activation account link in the email as shown below:
The user will enter **First** and **Last Name**, **User ID** (whatever is preferred) **Password** and **Confirm Password** and will click **Activate Account** button as shown below:

![Sign Up](image1)

The **Account is Activated** and user will be logged into the Money Smart Week website as shown below:

![Find an Event](image2)

The user can now enter the events. The step by step procedure to enter the event is mentioned below in **section 3**.
3. **ENTER AN EVENT**

After signing up successfully as partner the user will first login as partner to enter the events. The user will click **Login** option on the top right side of the page as shown below:

The user will enter **Email Address** and **Password** and click **Sign in with Email** button.
The user is now logged in to the website as the user’s Login ID can be seen at the bottom of the page.

To enter the event the user will click **Events** menu on top right side of the page and click **Start an Event** option as shown below:
The user will click **Start an Event** option.

The user will enter the information regarding the event.
The user will fill all the mandatory fields to enter the Event. User will select Visibility (Private, Public & Online) from dropdown menu, enter Event Title, enter Event Description, select Start and End Date & Time, select Time zone, enter Maximum Capacity, select Audience (Adult (18 and Over) or Kids), select Event Type (Classroom, Fair & Webinar), select Topic from the drop down List, Select Language (Arabic, Chinese, English, Hmong, Korean, Polish & Spanish), enter the Contact info like Name, Email, Phone, Sponsored By, Contributing Partners.

User may also choose Not to publish their email address and Phone number for the event by selecting Don’t Publish Email Address and Don’t Publish Phone Numbers Options.

User will enter the Location information by entering Venue Name, Address, City, Postal Code & selecting the State from the list and click Create Event button.
The event is created, user can also post the event on social media if desired by clicking **Post** button or click **No Thanks** option.

The user can now view the event that was entered.
3.1. **EDIT AN EVENT**

If user want to edit anything in the event at that point when created then the user can click **Edit the Event** button on the event page as shown below:

![Event Page Example](image)

**TOPICS**: Kids And Money  
**LANGUAGE**: English  
**SPONSORED BY**: Chicago Library, Chicago Library  
**How kids can manage money from a very young age**

**MONEY MANAGEMENT FOR KIDS**  
April 22, 2018

**WHEN**  
April 22, 2018  
12:00 PM - 1:00 PM

**WHERE**  
Chicago Public Library, Chinatown Branch  
2300 S. Wentworth Ave  
Chicago, IL 60606  
United States  
Google map and directions

**CONTACT**  
Money Smart Week  
(312) 322-0000  
money-smart-week@chicagolib.org
User can edit the information of the event and click **Update Event** button.

But user cannot **Edit the Title of the Event at any point**, if the Title is misspelled or incorrect then the Event is required to be **Deleted** and user will be required to enter a new Event.
If the user wants to edit the event later, then user needs to refer to email that was send by Money Smart Week when the Event was created/registered successfully. The email will be from Money Smart Week with Subject line Thank you for Hosting. That email will have complete detail for the event and also a link to edit or make changes to the Event as shown below:

![Email](https://www.moneysmartweek.org/MoneySmartweek/money_savings_ojb4gh5baubxr-czkrizda?recruiter_id=19934)

Money Smart Week --

Thank you for hosting a Events event.

Here's the link where people can RSVP:


Please double check your event details below.

Contact: money Smart Week
Email: moneysmartweek@chifrb.org
Phone:

Name: Money Savings
When: April 21, 2018 at 12pm
Length: 1 hr
Time zone: Central Time (US & Canada)
Venue name: Chicago Public Library, Chinatown Branch,
Address: 2100 S Wentworth Ave, Chicago, IL 60616, United States
Maximum capacity: 50

Description: How to save money

Make changes here: [http://www.moneysmartweek.org/users/event_pages/8051/edit](http://www.moneysmartweek.org/users/event_pages/8051/edit)

This email was sent to moneysmartweek@chifrb.org. To stop receiving updates on this page, [unfollow here](http://www.moneysmartweek.org/users/event_pages/8051/edit). Money Smart Week - 230 S LaSalle St, Chicago, IL 60604, United States

Created with NationBuilder, software for leaders.

The user will click the link make edits or changes and click Update Event button as explained above.
3.2. RSVP

The event will also show the RSVP for that event on the event page. User or customer/attendee can RSVP and click **Update RSVP button** as shown below. This would show number of people who had RSVP.

An email will also be send to the user/partner who had created the event about number of RSVPs for the event as shown below:

Thank you for your RSVP +4for a Events event.

This event was posted by the host, Money Smart Week. Please contact us if you have any questions or concerns about it's content and we will work to get it fixed.

Host: Money Smart Week
Email: moneysmartweek@chib.frbo.org
Phone:

WHAT: Money Management for Kids
WHEN: April 22, 2018 at 12pm
WHERE: Chicago Public Library, Chinatown Branch
2100 S Wentworth Ave
Chicago, IL 60616
United States
Google map and directions
CONTACT: Money Smart Week - moneysmartweek@chib.frbo.org - 3123220000

If you need to update or cancel your RSVP, use this link:

https://www.moneysmartweek.org/sabbaas/money_management_for_kids?e=77d58f22693c2cc16c616de53e1a00

And you can invite others to join you at the event with this link:

https://www.moneysmartweek.org/sabbaas/money_management_for_kids?recruiter_id=19934

Money Smart Week
http://www.moneysmartweek.org/
3.3. **DELETE AN EVENT**

The Edit link will only allow user to make edits or changes to the event but a user cannot **DELETE** an event. The user also cannot edit the Title of the Event. If you require to **Delete** an event then you may contact/email **Money Smart Week Team**.

3.4. **FORGET PASSWORD**

If the user forgets **Password** while logging into the website. The user will click “**FORGET YOUR PASSWORD**” option as shown below:

The user will enter the email address where the password rest link is sent and click **Send Password Reset Instructions** button as shown below:
There will be a pop up message that will confirm that the password reset link has been sent to the provided email address.

The email will have link to reset the password as shown below:

https://msw.nationbuilder.com/users/password?23e09976abc9e85e19f5aa3bd4620f

This email was sent to moneysmartweek@chi.frb.org
Money Smart Week, 230 S LaSalle St, Chicago, IL 60604, United States
Created with NationBuilder, software for leaders.
The user will click the link and will enter Password and Repeat Password and click Change Password button.

The password will be changed. The user can now Login with the Email ID and password to enter the events.

3.5. **Logout**

The user can also Logout of the website by clicking Logout button on the bottom Right side of the page as shown below: