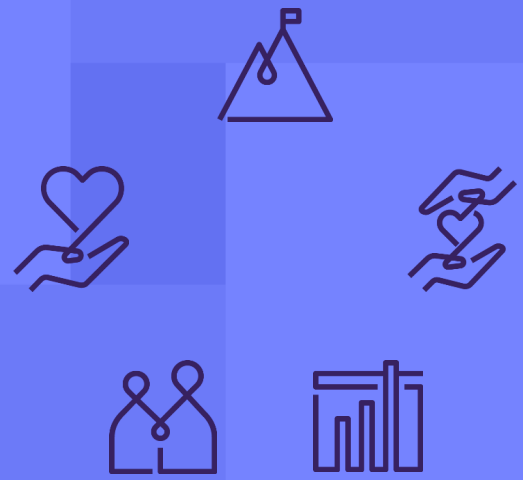
DONOR ENGAGEMENT

Creating & Managing Events



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Introduction & Learning Objective

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Meet your Trainer...

Dan Mathias

Training Specialist

Donor Engagement

EveryAction

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Agenda

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Agenda

1. Events Overview
2. Viewing and Sharing Scheduled Events
3. Creating an Event Signup Form
4. Q&A

Events Overview

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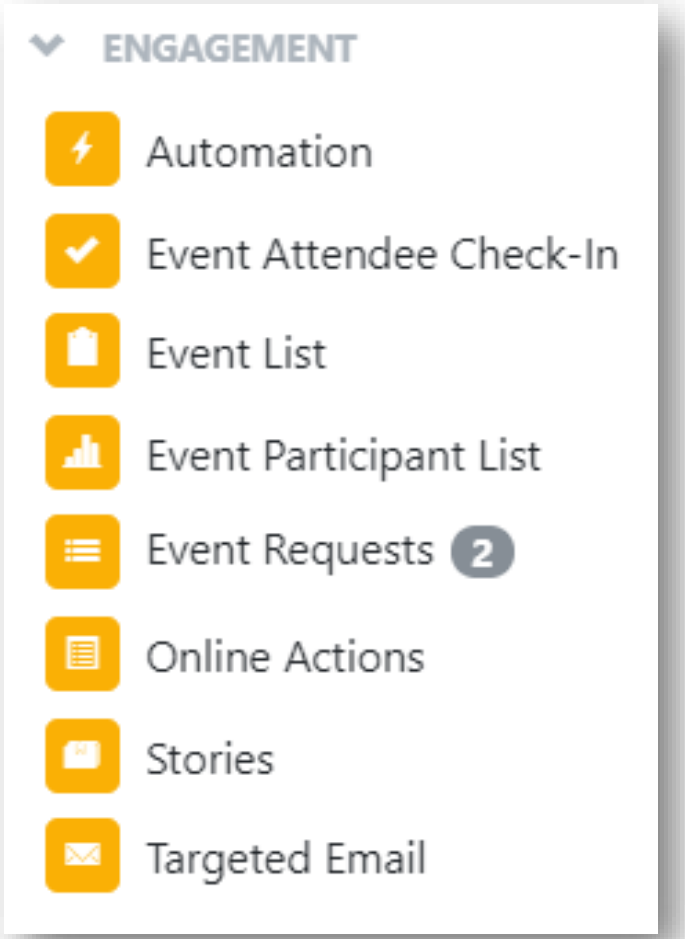
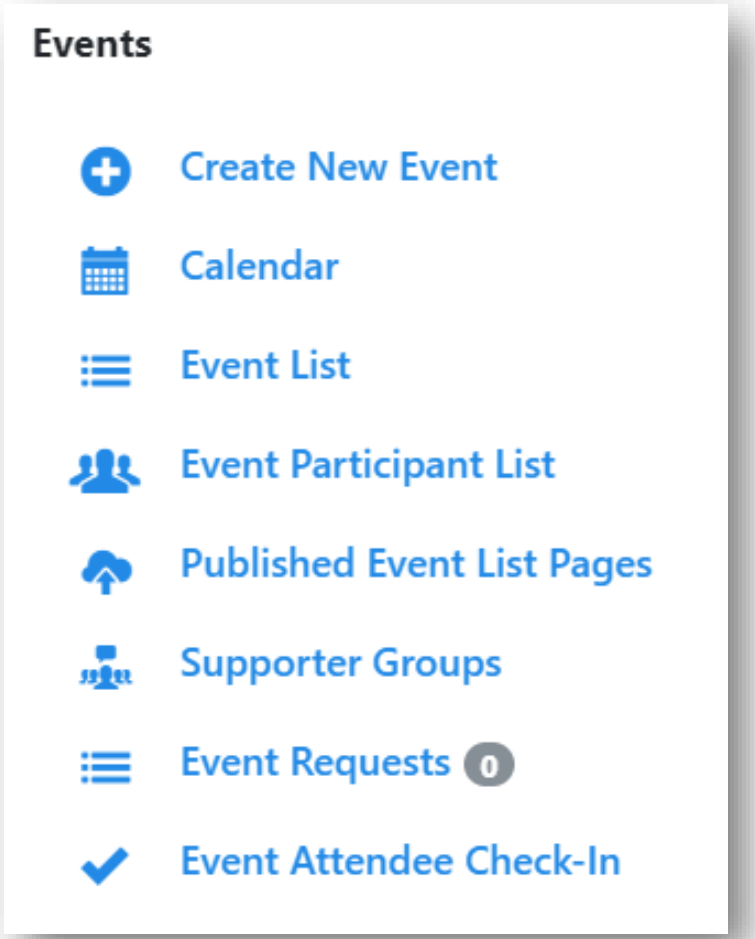
Events Overview





We have a suite of tools designed to help you create and manage your **Events** that will make it easier to create invitation and attendee lists, capture contact details from new supporters, and create reports using the information you've collected.

You can find these tools from the **Engagement** section of the **Sidebar** or from the **Events** card on the **Main Menu**.

Event Types

You can create and manage almost any type of **Event** you need from the **Event List** page. Depending on your package and permissions, you can create new **Event Types** that match your organization's needs, including things like:

- **Canvass**
- **Fundraiser**
- **Phone Bank**
- **Rally**
- **Summit**
- **Volunteer Event**
- **Walks**

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Tracking and Monitoring your Events

You will be able to track your events using:

•**Event Participant List** - with this list you can search for and view all participants for your events. You can then export your filtered list

•**Published Event List Pages** - this is a list of the online forms that are associated with your **Events**

•**Calendar -** use this to view all the events for the current month. You can also **Add New Event** and view the **Event List** from this tool

•**Supporter Groups** - create groups that you can assign to event teams

•You can also monitor your event signups using the **Event Participant Report** which will display the signups created in the last 365 days.

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Working with Ticketed Events

Some organizations will also have packages that include **Ticketed Events** that are meant to be used with specialized online signup forms and reports.

If your organization is required to file compliance or disclosure reports, you can set up your Ticketed Events to make it easier to track your contributions and disbursements associated with the event.

Reporting:

There are also a few specialized reports you can use to help you manage and track the success of your ticketed event participation, including:

- **Ticketed Event Contribution Report** - track contributions associated with your event via ticket purchases or additional contributions, as well as any refunds
- **Ticketed Event Disbursement Report** - track disbursements associated with your event
- **Ticketed Guest Report** - view tickets purchased for events and any guest names provided

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Working with Hosted Events

If you often have events that others host on your behalf, your package may include an **Event Type** that will allow your supporters to create **Events** on your behalf using **Hosted Events**. You will be able to use the **Event Requests** list to view and manage all the recent requests from your supporters that want to host events on behalf of your organization.

Zoom Integration:

We also offer an add-on **Zoom** integration that will make it easy to sync your invitation and participant lists with your **Zoom** event.

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Viewing and Sharing Scheduled Events

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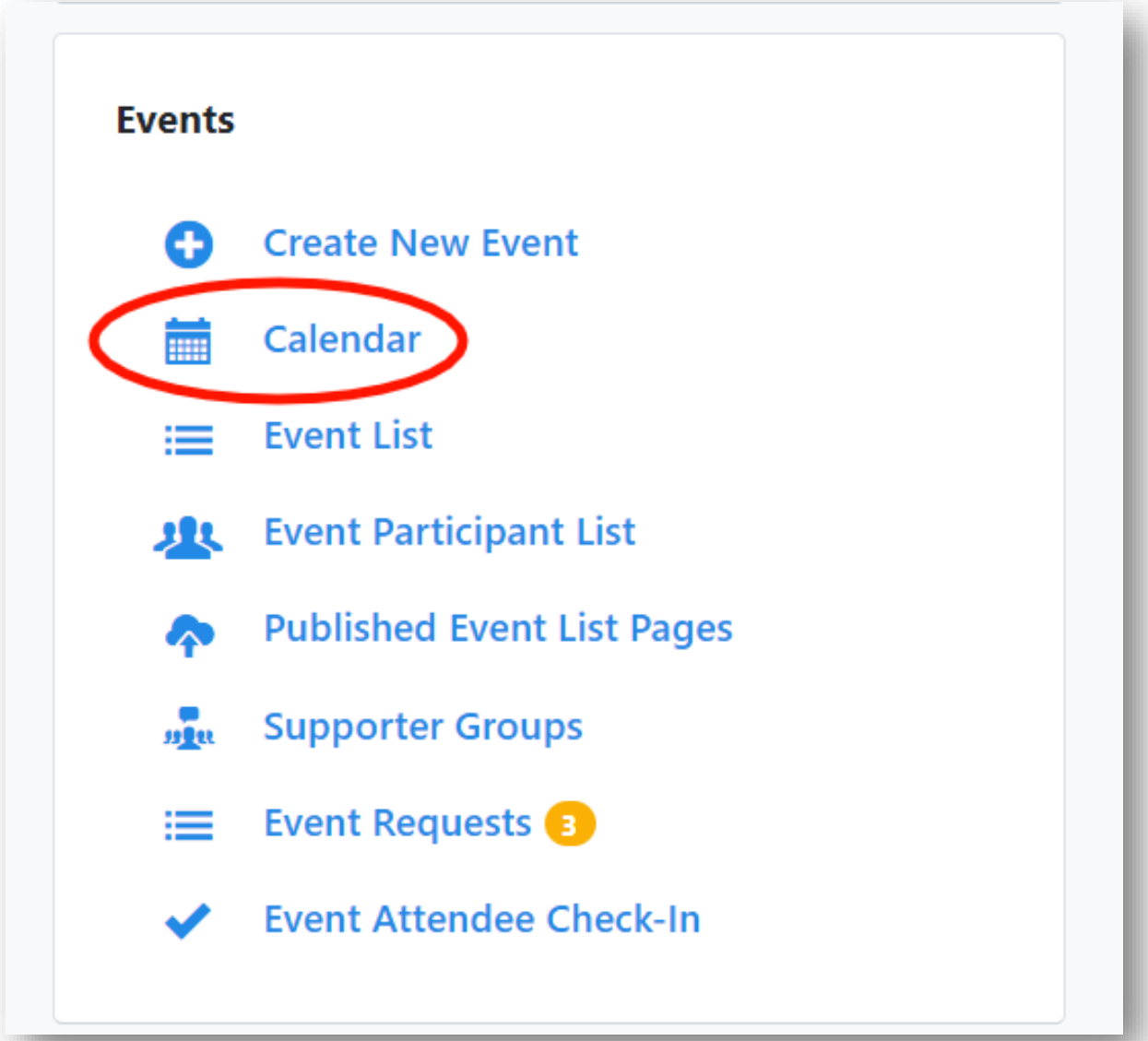
Viewing and Creating Events from the Calendar

To get to the event calendar,
select **Calendar** under the **Events** section of the Main Menu, or search for it using the sidebar.

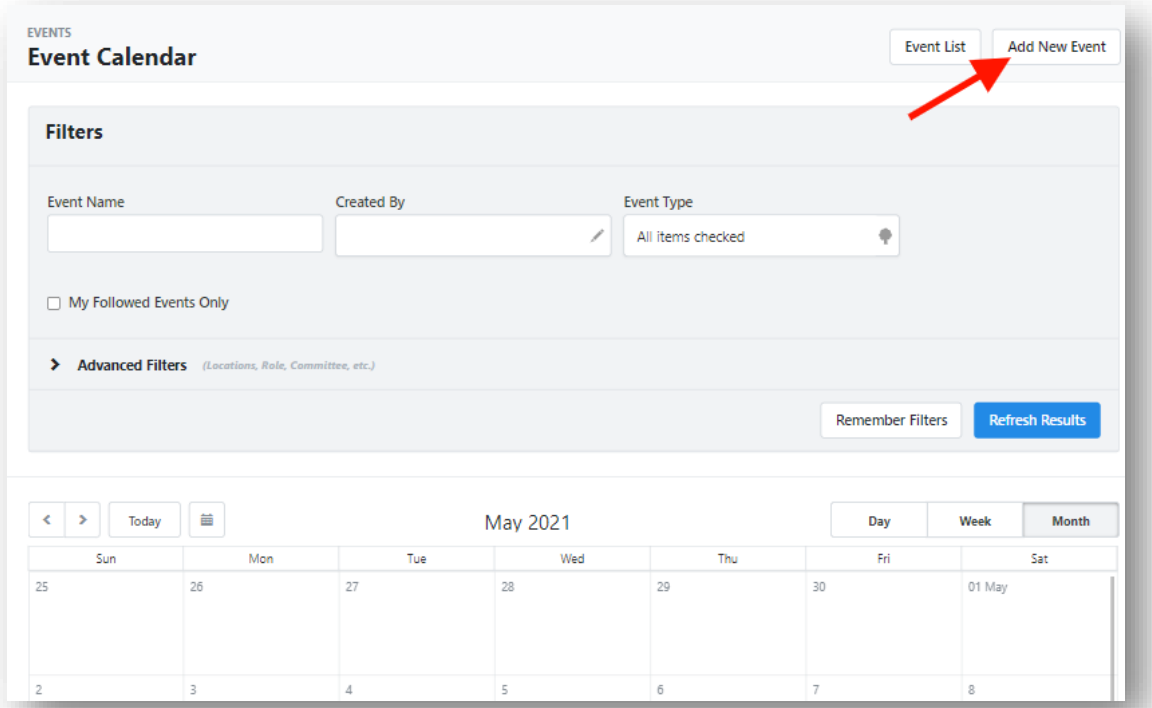
You will then be able to see any other events you have scheduled. You can change the view to see events per day, week, and month.

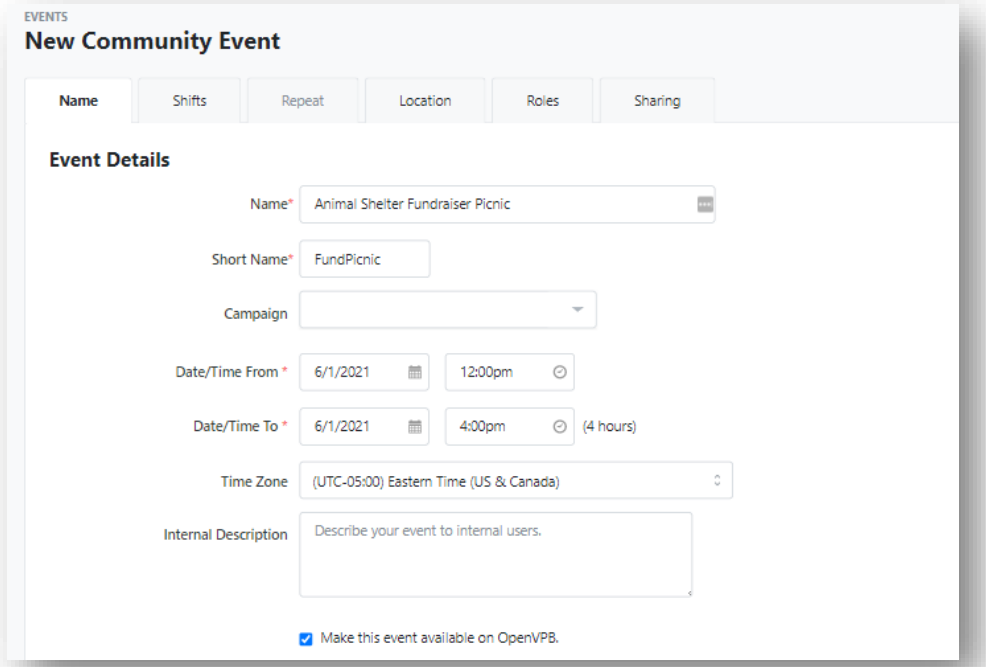


Creating Events from the Calendar

To create a new event, click **Add New Event** in the upper right corner.

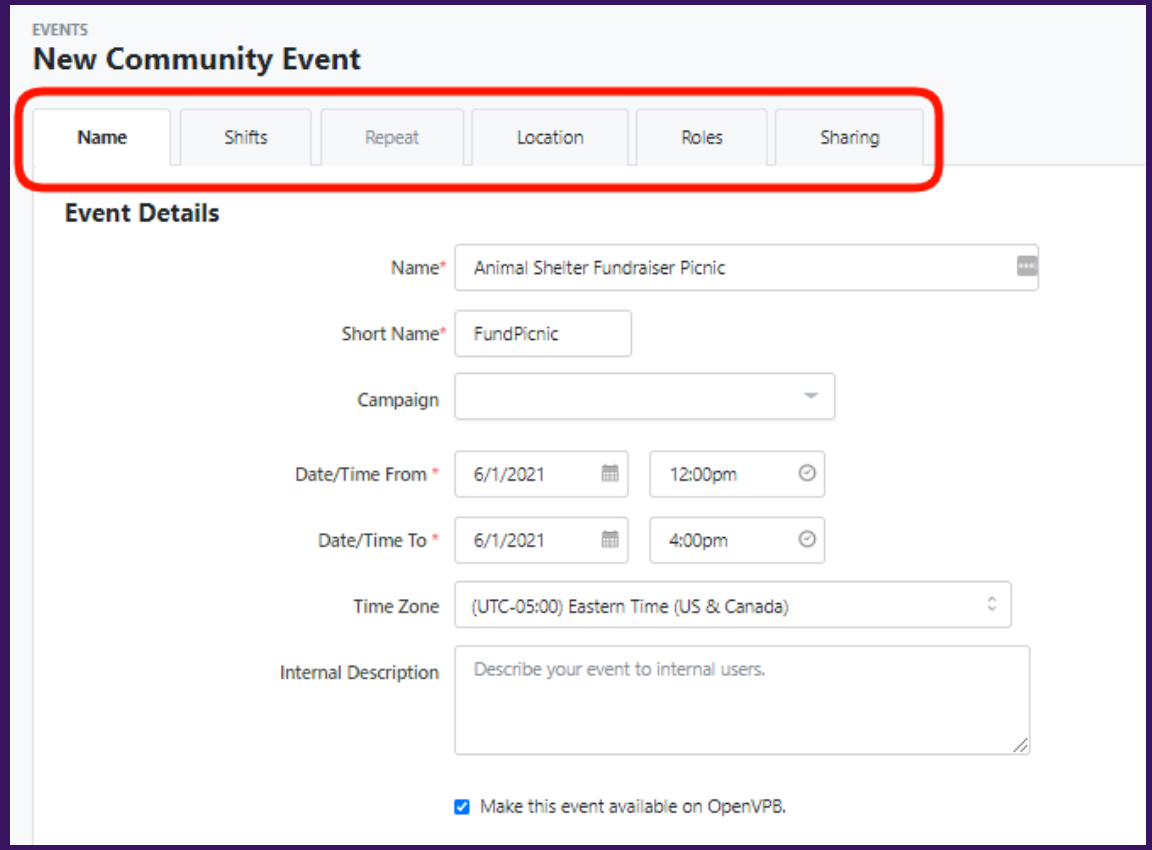
You will then be prompted to choose the **Event Type**. Once selected you will be asked to fill out the main details like **Name, Short Name** (visible internally), **Date From,** and **Date To**. You can also link the event to an existing **Campaign.**





Creating Events from the Calendar

Once the main information fields have been filled out, select **Next** or use the tabs along the top to add **Shifts, Location,** available **Roles**, and customize the **Sharing** permissions.



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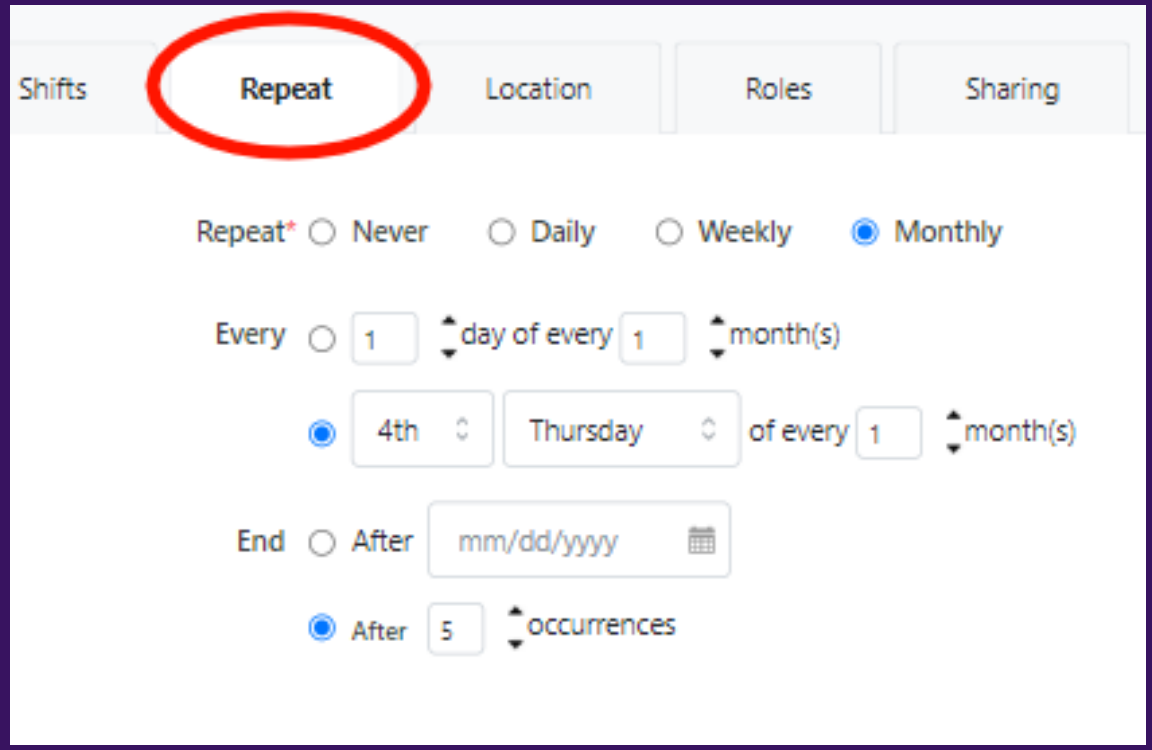
Creating Events from the Calendar

If you have allowed Events of this Type to repeat, then you can also use the **Repeat** tab to schedule recurring instances of the event.



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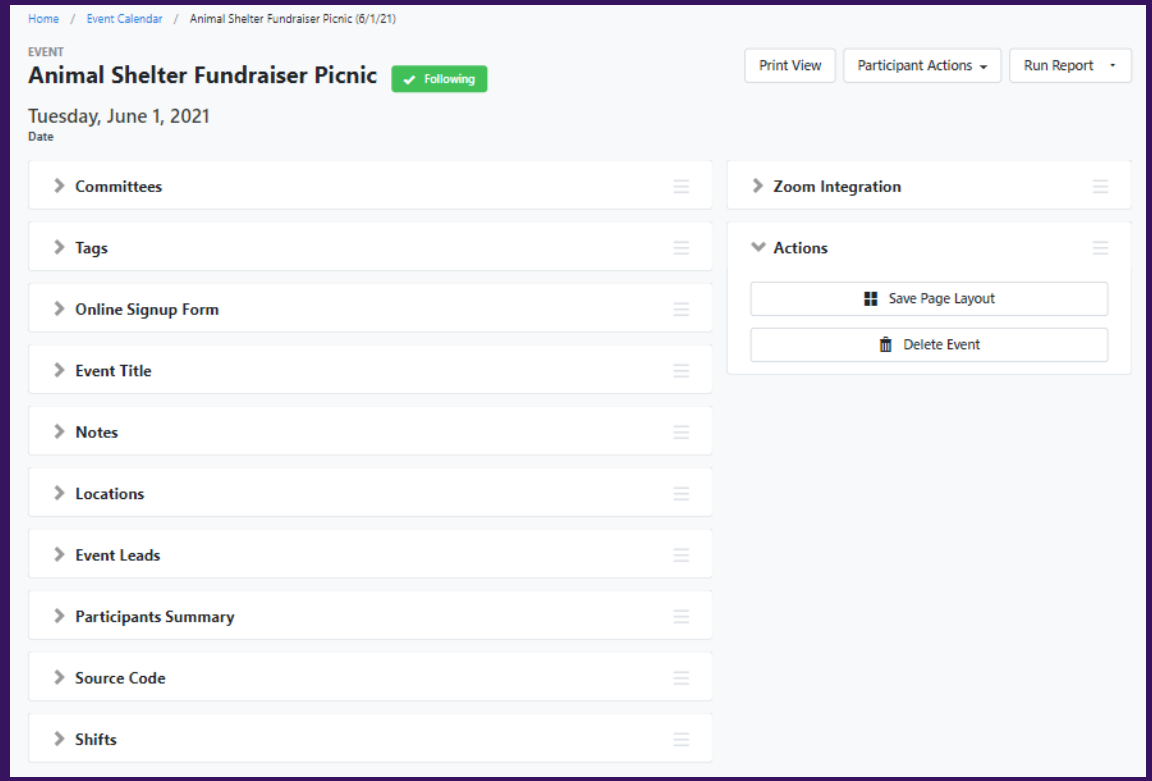
Creating Events from the Calendar

When done customizing, select **Finish**.

You can then see the **Event Details** page, which can later be accessed through the Calendar itself or from the **Event List** on the main menu.

From here, you can edit details and keep track of participants.

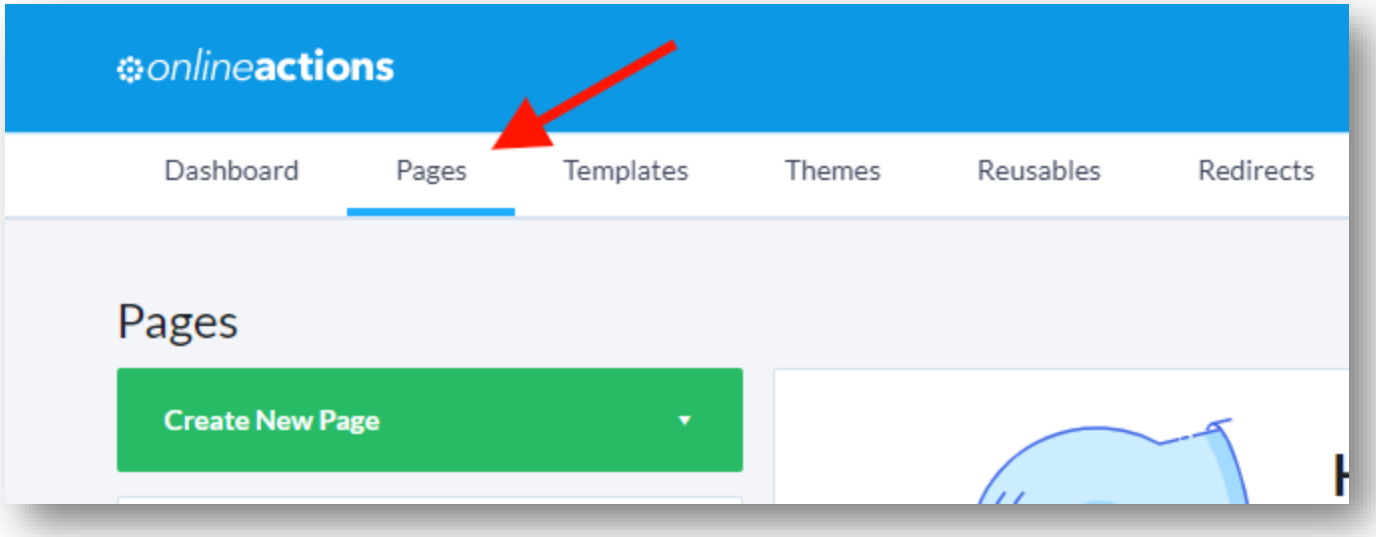


Sharing your Event to Supporters

To invite supporters to your Calendar events outside your organization, you can publish an **Event Signup form**.

To share all upcoming events to your supporters, you can also use an **Event List page**. This page will allow your supporters to find upcoming events based on location, date, or event type.

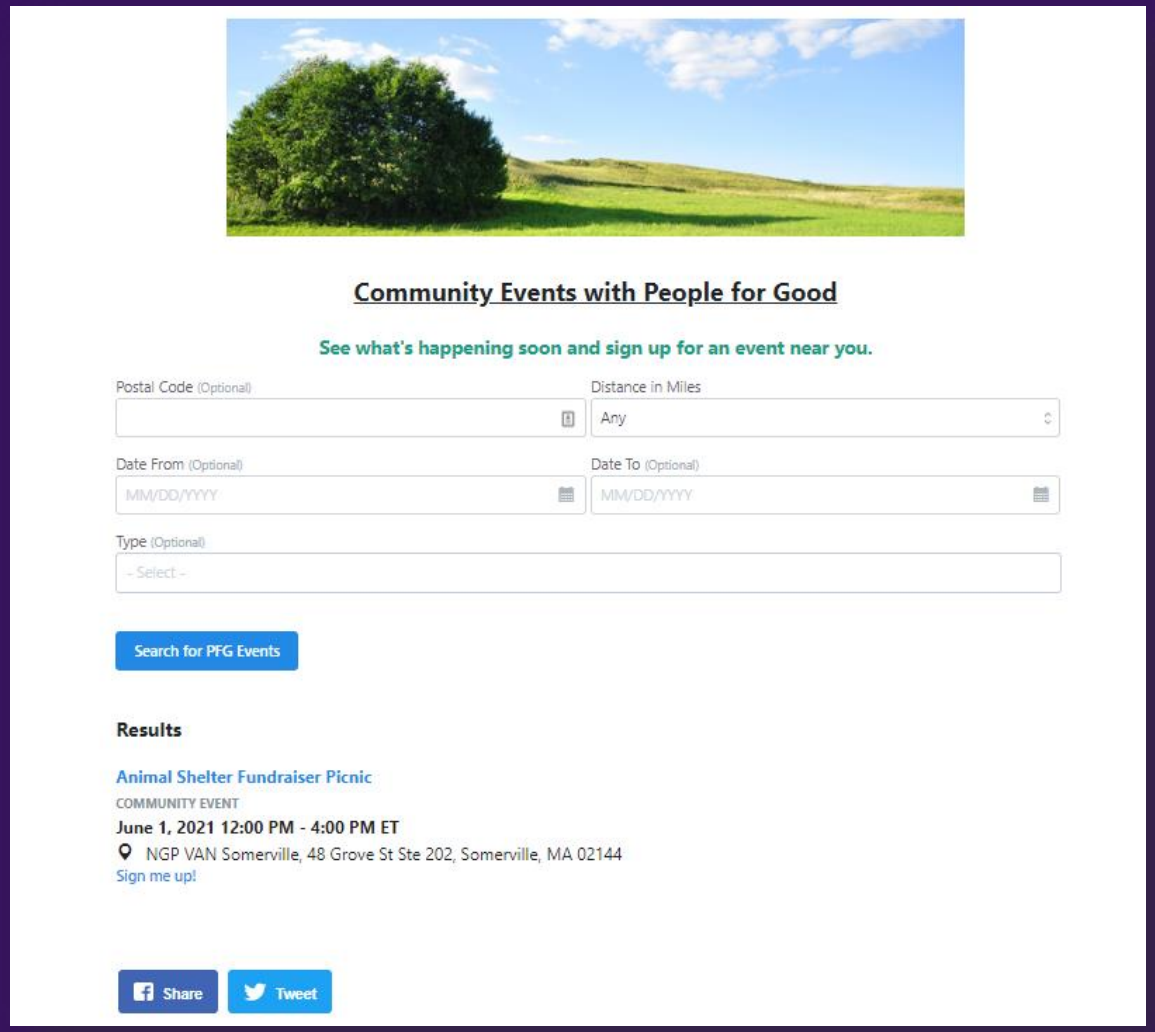
To get started, open the **Online Actions** homepage and navigate to **Pages.**



From there, click on **Create New Page** and select **Event List** from the dropdown menu. You can then decide which types of events should be included on your page and customize your page to your liking.

Sharing your Event to Supporters

Once you publish your Event List page, you will be able to share the link to others outside your organization.



Creating an Event Signup Form

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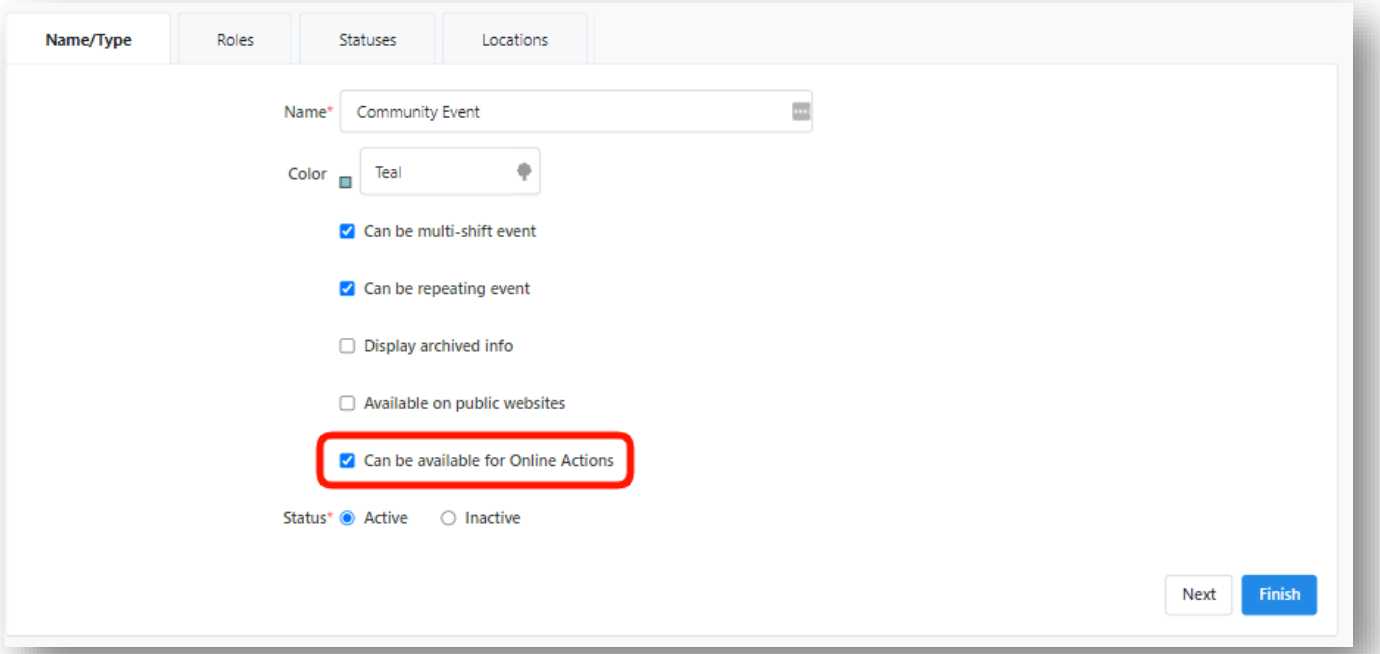
Creating your Event Types and Roles

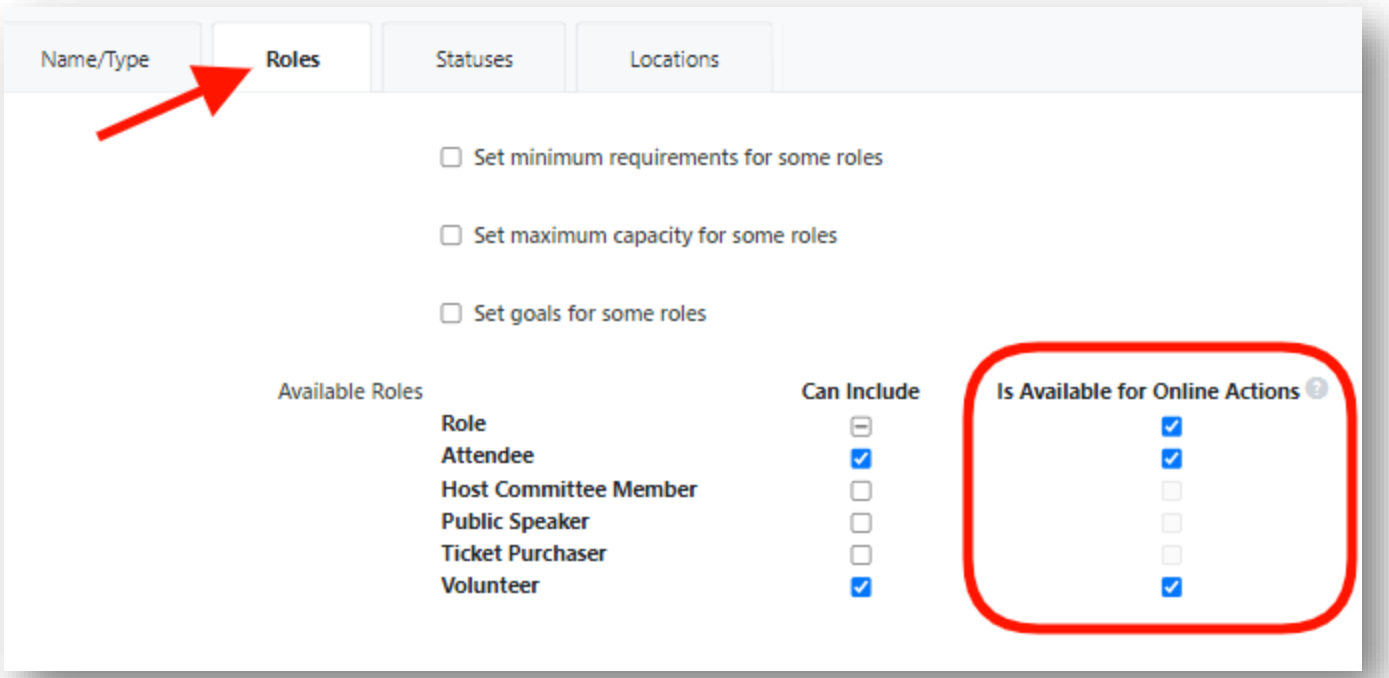


Before you can publish an Event Signup Form, **determine which Event Types** and corresponding **Event Roles can be published** in Online Actions.

Search Event Types, select the one you want, and **check Can be available for Online Actions** box.

Creating your Event Types and Roles

As you edit the Event Type, decide which Event Roles to make available on the forms by selecting **Is Available for Online Actions**.

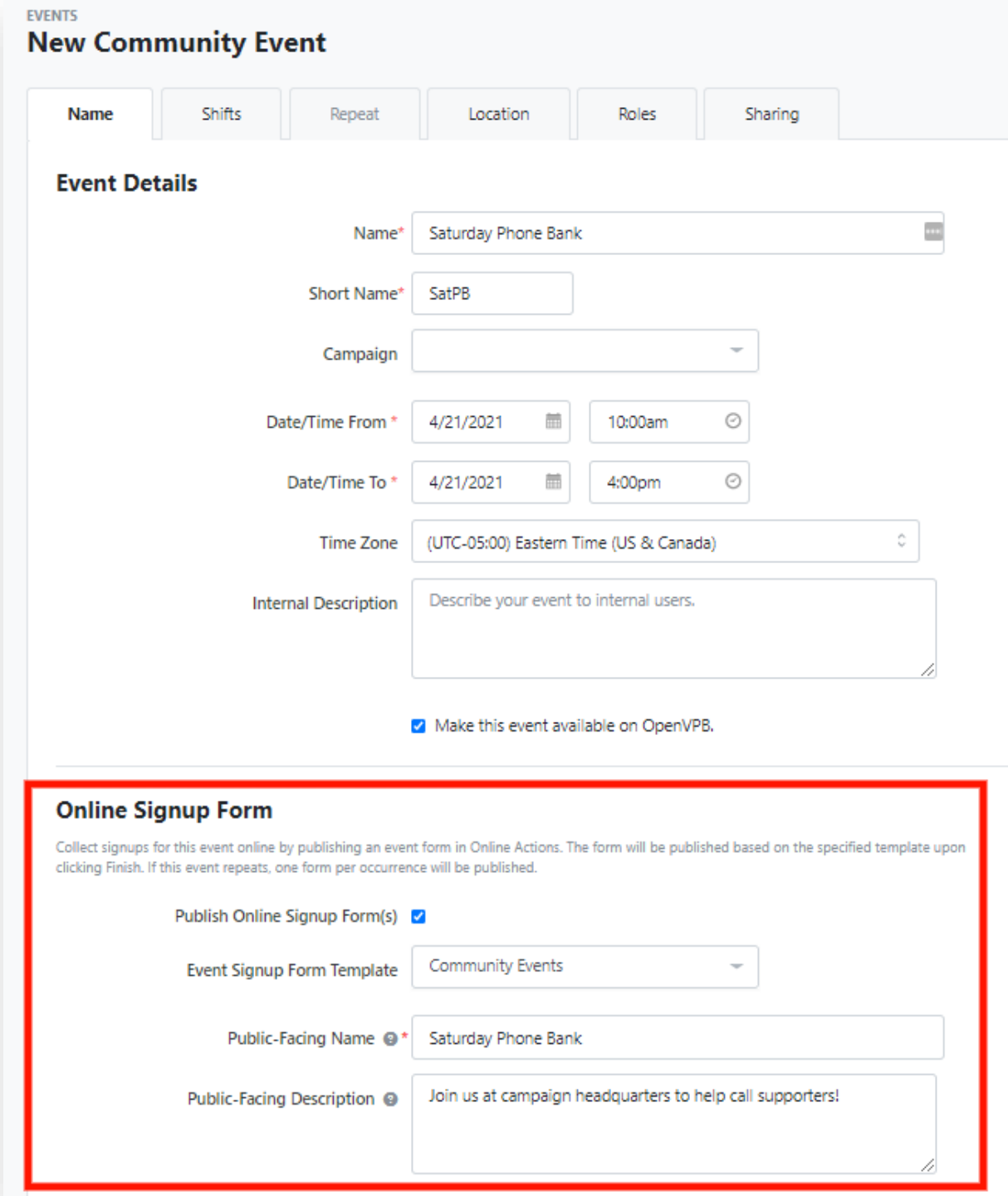


Publishing your Form

Once Event Types and Roles are enabled for Online Actions, you can publish Events of that type by selecting **Publish online signup form(s)** the bottom of the first step for creating a new event.

Three additional fields appear:

- **Event Signup Form Template** - If you created an **Event Signup Form Template**, you can apply it to the Online Signup Form.
- **Public-Facing Name** - This appears at the top of the form, below your logo.
- **Public-Facing Description** - This appears in the text below the header, above the form fields.



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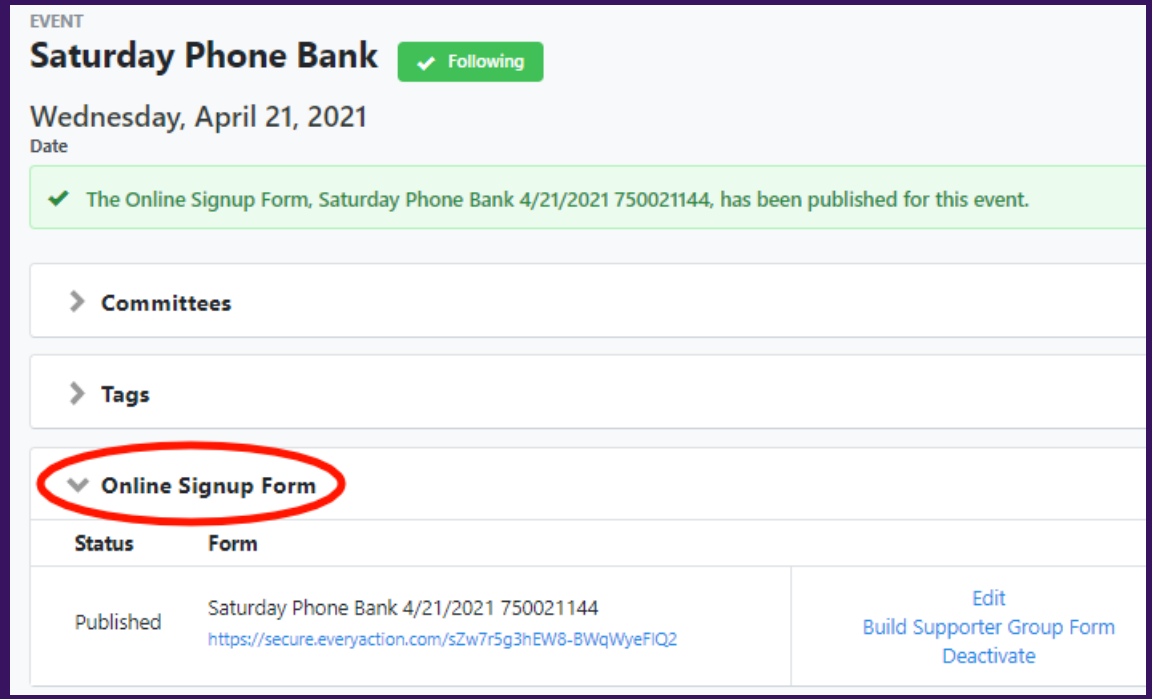
Publishing your Form

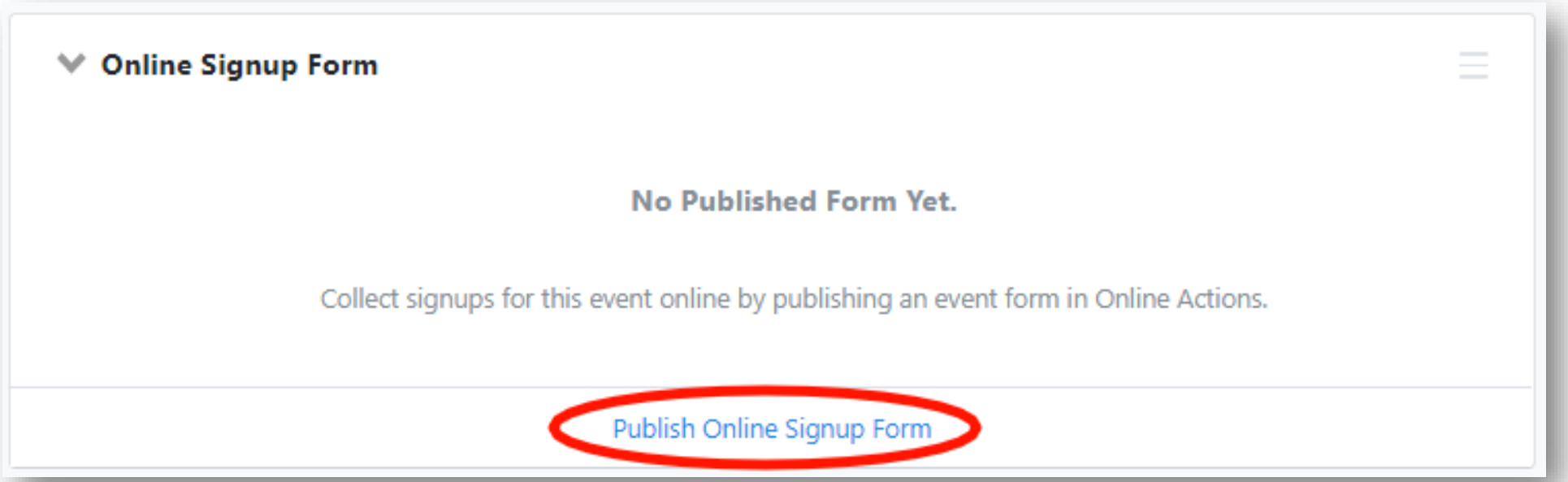
Finish to create your Event Signup Form. One form is published for each instance of a recurring event, which can prolong the time required to publish.

Once an Event Signup Form publish, the **URL appears in the Online Signup Form section** of the Event details.



Publishing your Form

You can publish an existing event in the same section using the **Publish Online Signup Form** link in the same section.



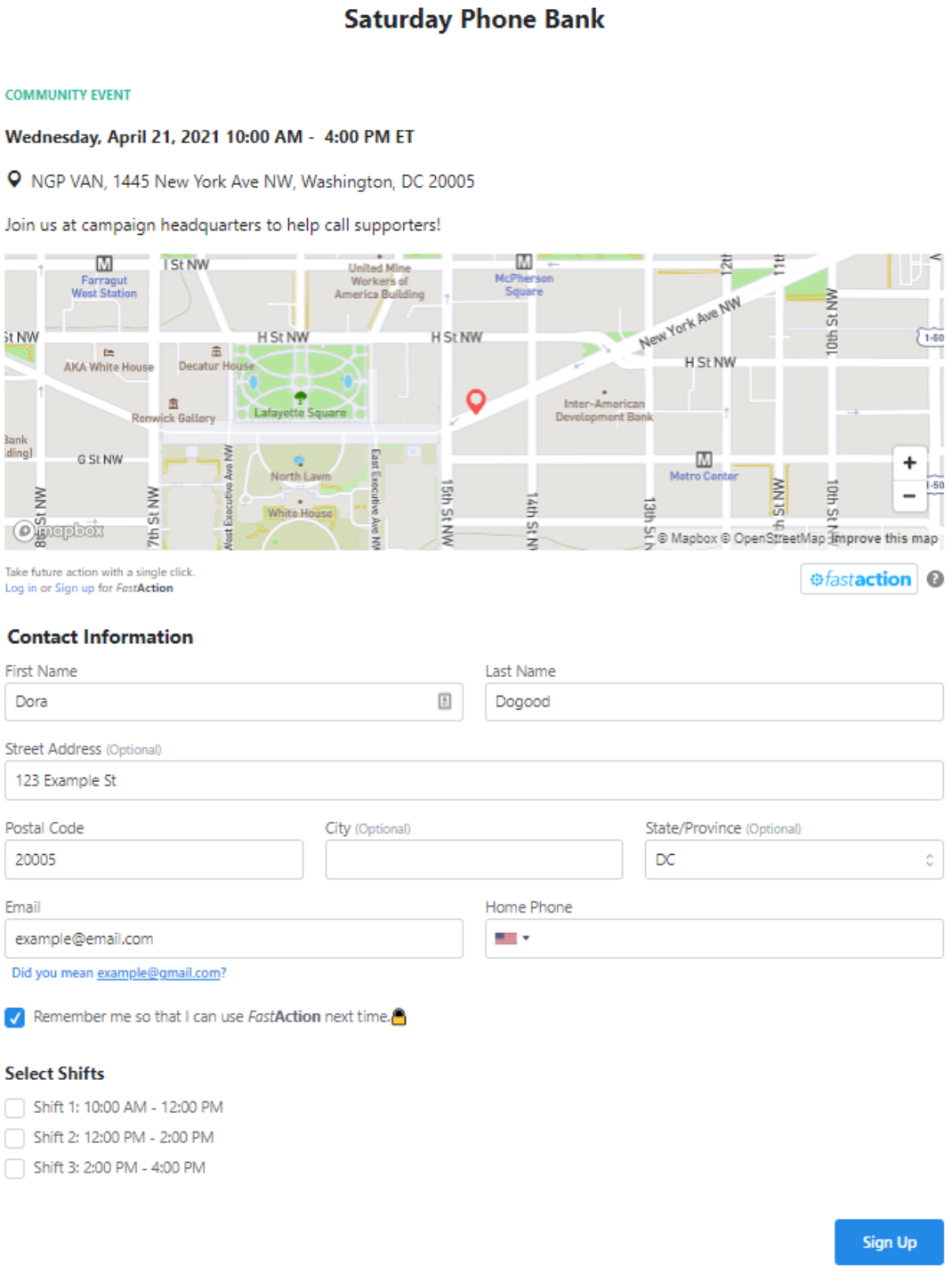
Submitting an Event Signup Form

When a supporter visits an Event Signup Form, they can see the name, event type, description, date, time, and location(s).

A map renders the location pins, if they have been assigned coordinates in the database.

If you've included multiple values, supporters can select the location, role, and shifts they want to sign up for before submitting their contact information.

By default, the **Thank You** page includes all the details of the event, including which shift and role the supporter selected. The confirmation email is not set by default, as the From Name and From Email Address need to be indicated; users can set this up in advance with an Event Signup Template, or afterward by editing the published form in Online Actions.



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Editing Event Signup Forms in Online Actions

Once an event is published to Online Actions, an **Event Signup Form appears on the Online Actions dashboard** for you to edit.

Along with your messaging, you can **customize fonts and colors, and change the display order of Locations and Roles**, as well as set values for those fields.

Like other form types, you can **apply a Theme, update the content and contact fields, and configure a Thank You page and Confirmation Email**.

Merge field content included in the form, Thank You page, and confirmation email will always display the latest changes made to the Event in the CRM.

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Q & A

Additional Resources

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Support

- Contact your System Administrator
- Email help@EveryAction.com
- Call (202) 370-8050
- Submit a Support Request Ticket from the Main Menu of the EveryAction CRM

Knowledge Base Articles

Overview: Events

How to: View and share scheduled events using the Calendar and Event List

How to: Create an Event Signup Form

How to: Add Event Types, Event Roles, and Locations

Additional Training

- Bonterra Academy: https://help.everyaction.com/s/article/Bonterra-Academy-Self-Signup
  - Foundational Webinar Series
  - Upcoming initiatives
  - Videos in Bonterra Academy

Feedback & Training Survey

1. Please fill out our 1-minute survey that appears after the webinar.
2. Access the survey here: Training Feedback Survey

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Thank You for Attending!

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