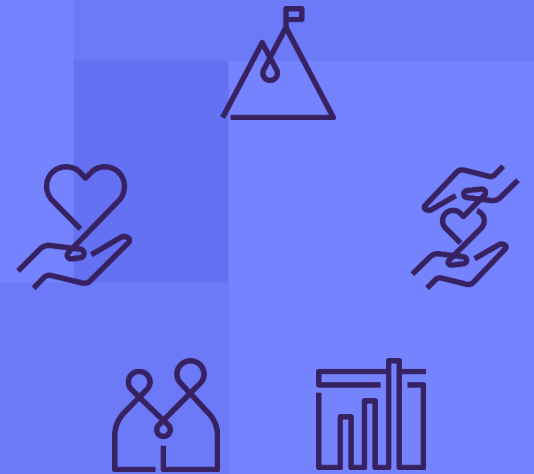


**DONOR ENGAGEMENT**

# Creating & Managing Events



# Introduction & Learning Objective

# Meet your Trainer...

Dan Mathias

Training Specialist

Donor Engagement

EveryAction



# Agenda

# Agenda

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



# Events Overview

# Events Overview

ENGAGEMENT

- Automation
- Event Attendee Check-In
- Event List
- Event Participant List
- Event Requests 2
- Online Actions
- Stories
- Targeted Email

Events

- Create New Event
- Calendar
- Event List
- Event Participant List
- Published Event List Pages
- Supporter Groups
- Event Requests 0
- Event Attendee Check-In

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**





# 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.



# 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



# 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.

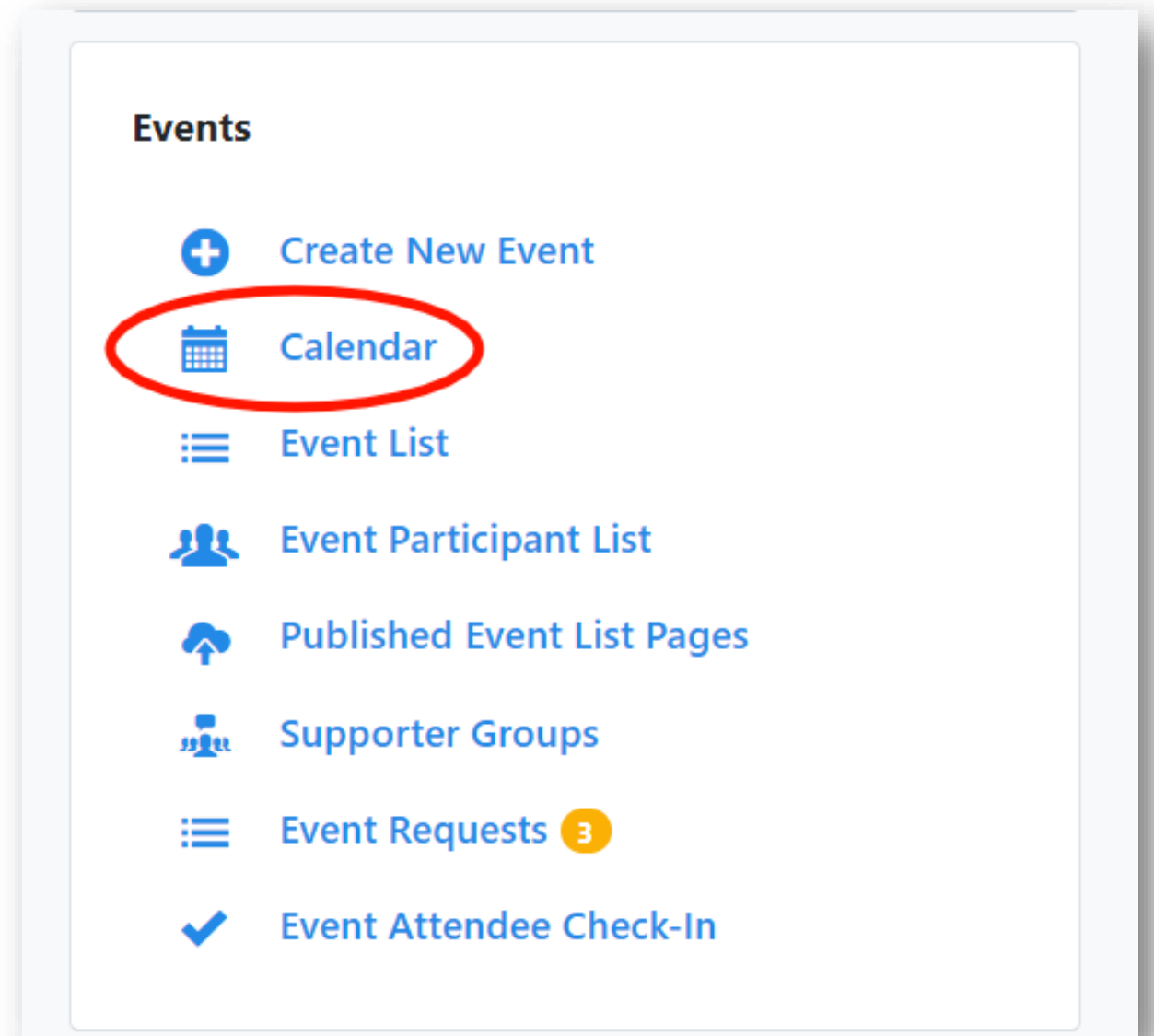


# Viewing and Sharing Scheduled Events

# 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.

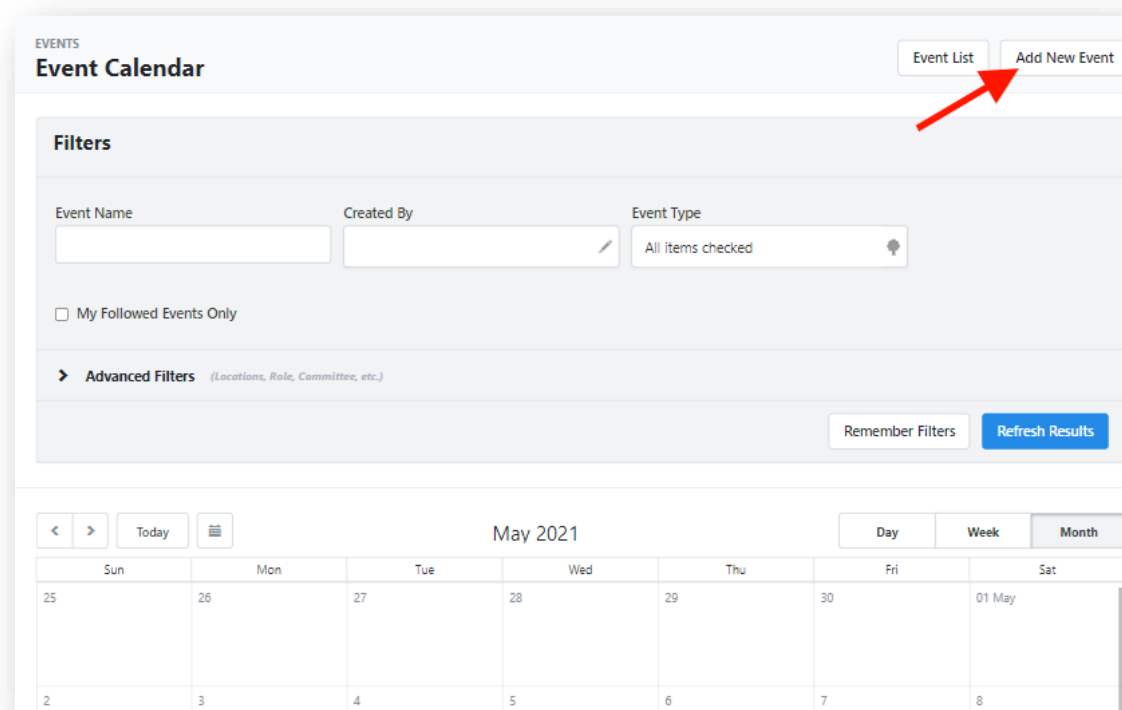
You will then be able to see any other events you have scheduled. You can change the view to see events per day, week, and month.



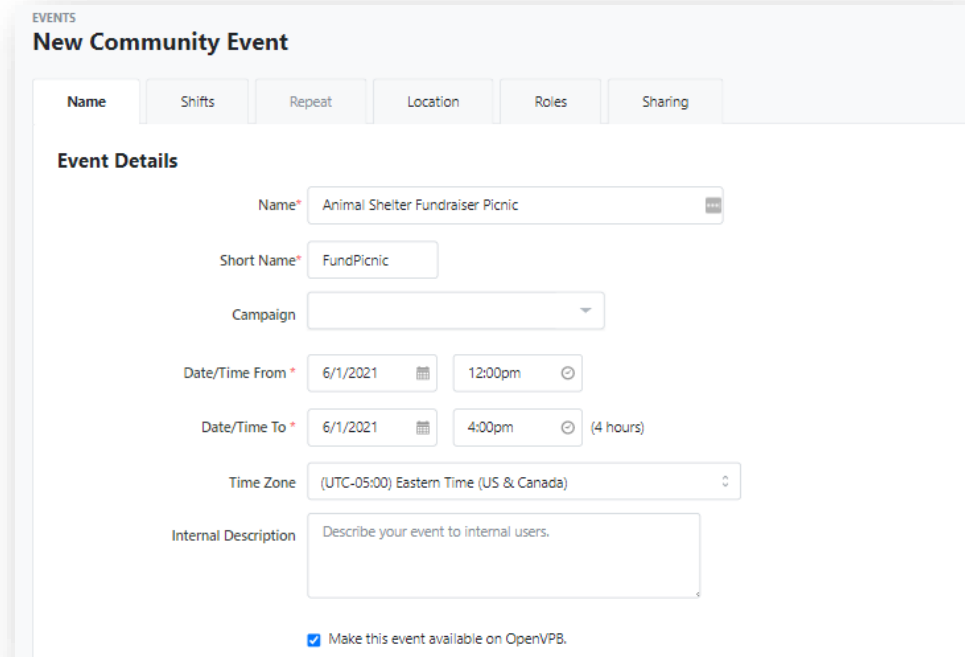
# Creating Events from the Calendar

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**.



The screenshot shows the 'Event Calendar' interface. At the top right, there are two buttons: 'Event List' and 'Add New Event'. A red arrow points to the 'Add New Event' button. Below the buttons is a 'Filters' section with input fields for 'Event Name', 'Created By', and 'Event Type' (set to 'All items checked'). There is also a checkbox for 'My Followed Events Only' and a link for 'Advanced Filters'. At the bottom, there is a calendar for May 2021 with navigation buttons for 'Day', 'Week', and 'Month'.



The screenshot shows the 'New Community Event' form. The form is filled out with example data. The 'Name' field contains 'Animal Shelter Fundraiser Picnic'. The 'Short Name' field contains 'FundPicnic'. The 'Campaign' field is empty. The 'Date/Time From' field is set to '6/1/2021' at '12:00pm'. The 'Date/Time To' field is set to '6/1/2021' at '4:00pm' with a duration of '(4 hours)'. The 'Time Zone' field is set to '(UTC-05:00) Eastern Time (US & Canada)'. The 'Internal Description' field contains the text 'Describe your event to internal users.' There is a checkbox at the bottom labeled 'Make this event available on OpenVPB' which is checked.

# 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.

EVENTS  
**New Community Event**

Name Shifts Repeat Location Roles Sharing

**Event Details**

Name\* Animal Shelter Fundraiser Picnic

Short Name\* FundPicnic

Campaign

Date/Time From\* 6/1/2021 12:00pm

Date/Time To\* 6/1/2021 4:00pm

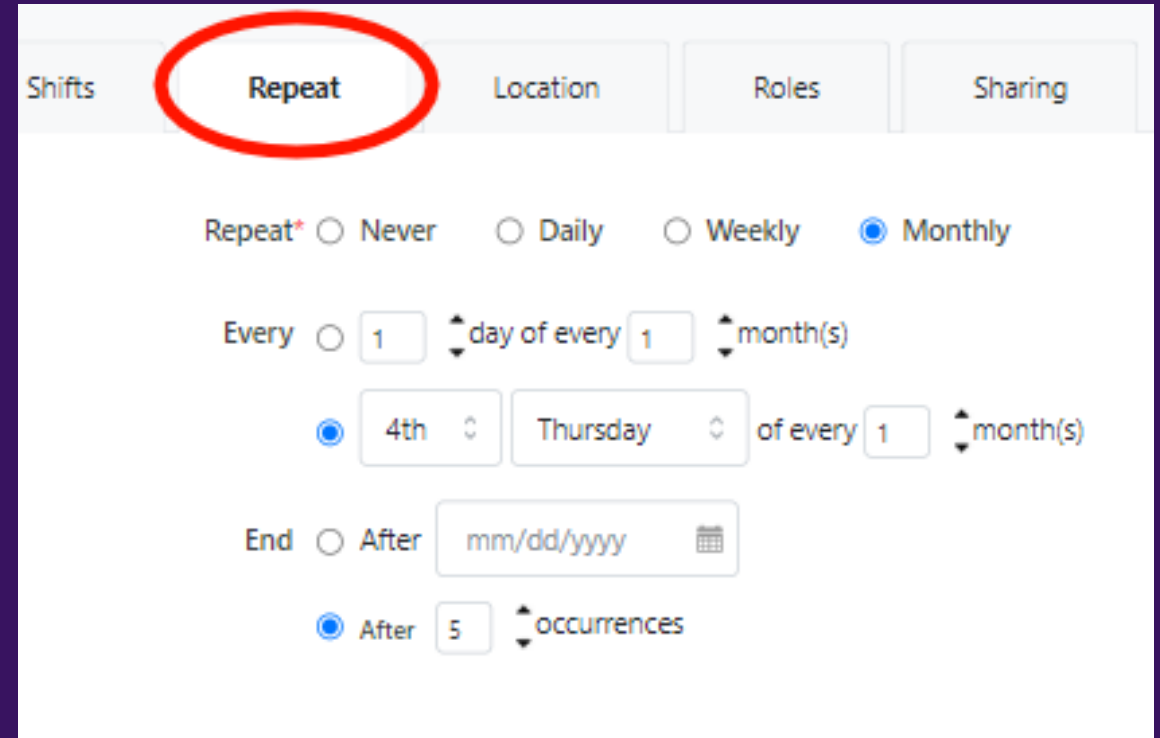
Time Zone (UTC-05:00) Eastern Time (US & Canada)

Internal Description Describe your event to internal users.

Make this event available on OpenVPB.

# 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.



The screenshot shows the 'Repeat' tab selected in a navigation bar with other tabs: 'Shifts', 'Location', 'Roles', and 'Sharing'. The 'Repeat' tab is circled in red. Below the navigation bar, the 'Repeat\*' section has four radio button options: 'Never', 'Daily', 'Weekly', and 'Monthly'. The 'Monthly' option is selected. Underneath, there are two rows of settings. The first row has 'Every' with a radio button, a text input '1', a label 'day of every', another text input '1', and a label 'month(s)'. The second row has a radio button selected, a dropdown menu showing '4th', another dropdown menu showing 'Thursday', a label 'of every', a text input '1', and a label 'month(s)'. The 'End' section has two radio button options: 'After' with a text input 'mm/dd/yyyy' and a calendar icon, and 'After' with a radio button selected, a text input '5', and a label 'occurrences'.



# 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.

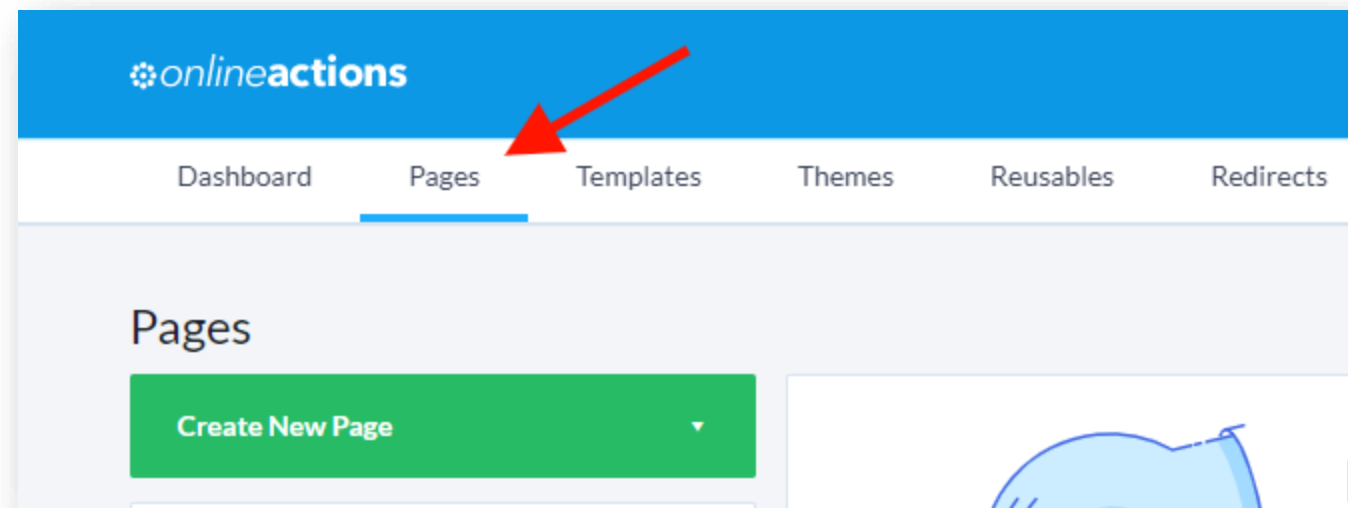
The screenshot shows the 'Event Details' page for 'Animal Shelter Fundraiser Picnic' on Tuesday, June 1, 2021. The page is titled 'EVENT' and includes a green 'Following' status indicator. At the top right, there are buttons for 'Print View', 'Participant Actions', and 'Run Report'. The main content area is divided into two columns. The left column contains a list of expandable sections: Committees, Tags, Online Signup Form, Event Title, Notes, Locations, Event Leads, Participants Summary, Source Code, and Shifts. The right column contains 'Zoom Integration' and an 'Actions' section with buttons for 'Save Page Layout' and 'Delete Event'.

# 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.



### Community Events with People for Good

See what's happening soon and sign up for an event near you.

Postal Code (Optional)  Distance in Miles

Date From (Optional)  Date To (Optional)

Type (Optional)

[Search for PFG Events](#)

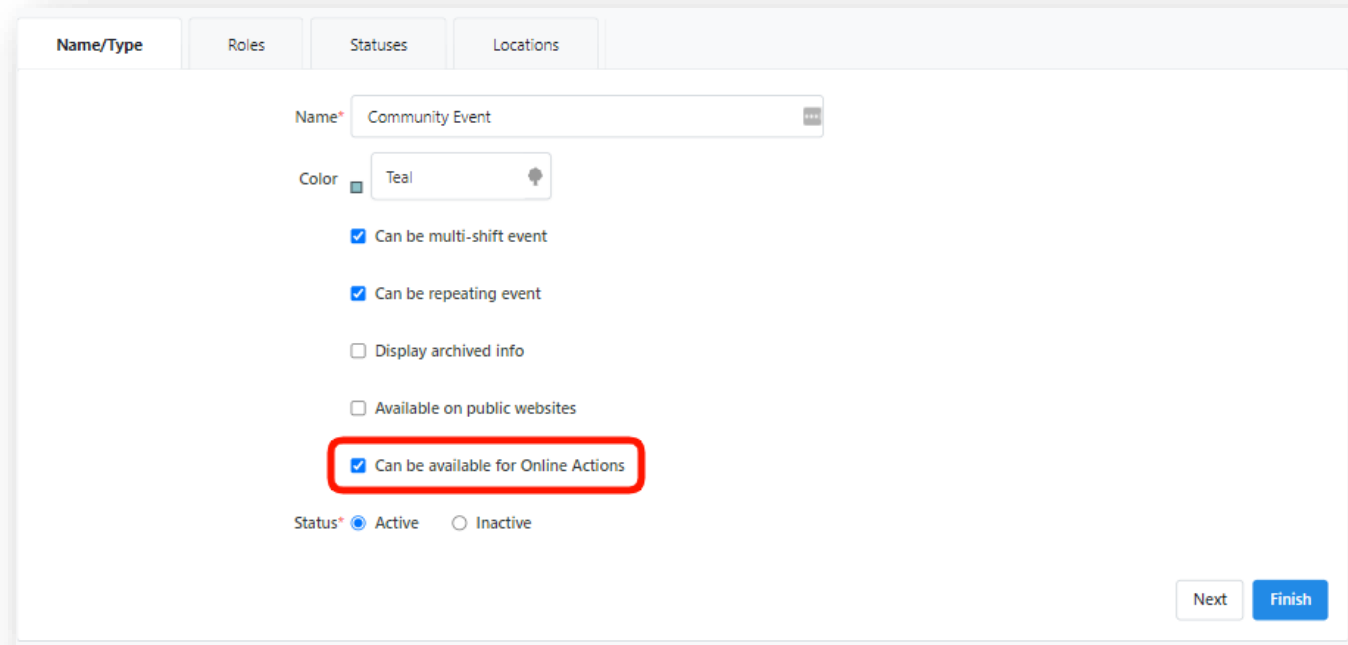
#### Results

[Animal Shelter Fundraiser Picnic](#)  
COMMUNITY EVENT  
**June 1, 2021 12:00 PM - 4:00 PM ET**  
📍 NGP VAN Somerville, 48 Grove St Ste 202, Somerville, MA 02144  
[Sign me up!](#)

[Share](#) [Tweet](#)

# Creating an Event Signup Form

# Creating your Event Types and Roles



The screenshot shows a configuration form for an event type. At the top, there are four tabs: "Name/Type", "Roles", "Statuses", and "Locations". The "Name/Type" tab is active. The form contains the following fields and options:

- Name\***: A text input field containing "Community Event".
- Color**: A color selection dropdown menu showing "Teal".
- Can be multi-shift event
- Can be repeating event
- Display archived info
- Available on public websites
- Can be available for Online Actions (highlighted with a red box)
- Status\***: Radio buttons for "Active" (selected) and "Inactive".

At the bottom right, there are two buttons: "Next" and "Finish".

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** for Online Actions.

The screenshot shows the 'Roles' tab in the Bonterra interface. At the top, there are four tabs: 'Name/Type', 'Roles', 'Statuses', and 'Locations'. A red arrow points to the 'Roles' tab. Below the tabs, there are three unchecked checkboxes: 'Set minimum requirements for some roles', 'Set maximum capacity for some roles', and 'Set goals for some roles'. The main content area is a table with three columns: 'Available Roles', 'Can Include', and 'Is Available for Online Actions'. The 'Is Available for Online Actions' column is highlighted with a red rounded rectangle. The table contains the following data:

Available Roles	Can Include	Is Available for Online Actions
Role	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Attendee	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Host Committee Member	<input type="checkbox"/>	<input type="checkbox"/>
Public Speaker	<input type="checkbox"/>	<input type="checkbox"/>
Ticket Purchaser	<input type="checkbox"/>	<input type="checkbox"/>
Volunteer	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

# 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.

Name	Shifts	Repeat	Location	Roles	Sharing
<b>Event Details</b>					
Name*	Saturday Phone Bank				
Short Name*	SatPB				
Campaign					
Date/Time From *	4/21/2021		10:00am		
Date/Time To *	4/21/2021		4:00pm		
Time Zone	(UTC-05:00) Eastern Time (US & Canada)				
Internal Description	Describe your event to internal users.				
<input checked="" type="checkbox"/> Make this event available on OpenVPB.					

### Online Signup Form

Collect signups for this event online by publishing an event form in Online Actions. The form will be published based on the specified template upon clicking Finish. If this event repeats, one form per occurrence will be published.

Publish Online Signup Form(s)

Event Signup Form Template Community Events

Public-Facing Name \* Saturday Phone Bank

Public-Facing Description Join us at campaign headquarters to help call supporters!

# 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.

EVENT

### Saturday Phone Bank ✓ Following

Wednesday, April 21, 2021  
Date

✓ The Online Signup Form, Saturday Phone Bank 4/21/2021 750021144, has been published for this event.

➤ Committees

➤ Tags

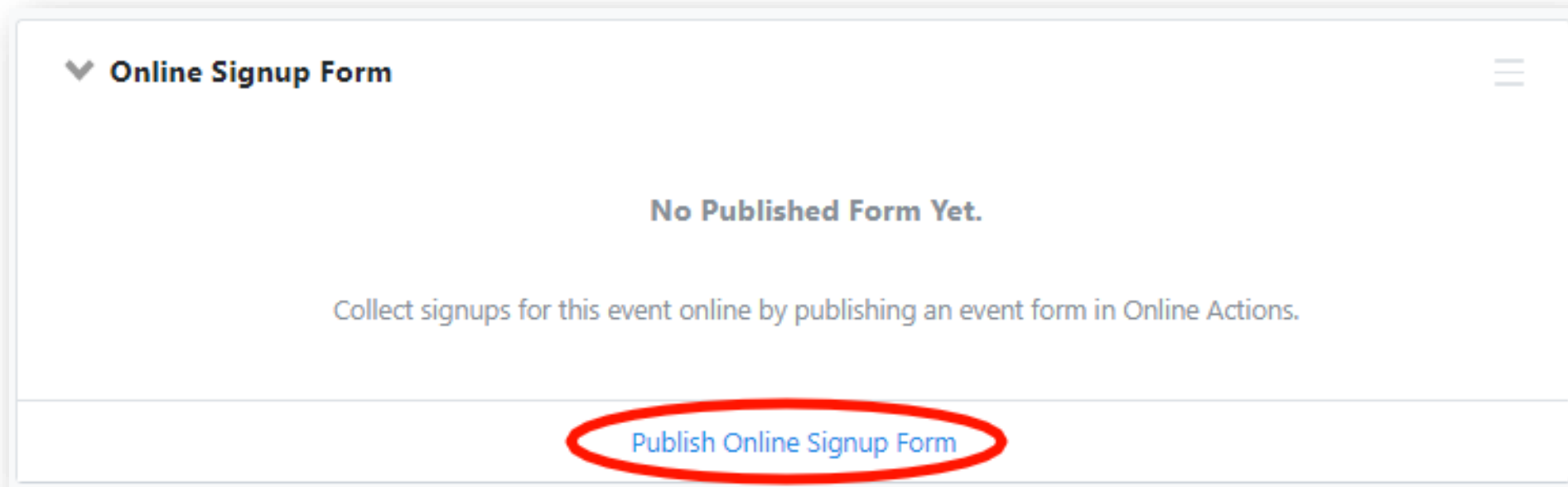
▼ **Online Signup Form**

Status	Form	
Published	Saturday Phone Bank 4/21/2021 750021144 <a href="https://secure.everyaction.com/sZw7r5g3hEW8-BWqWyeFIQ2">https://secure.everyaction.com/sZw7r5g3hEW8-BWqWyeFIQ2</a>	<a href="#">Edit</a> <a href="#">Build Supporter Group Form</a> <a href="#">Deactivate</a>



# 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.

COMMUNITY EVENT

Wednesday, April 21, 2021 10:00 AM - 4:00 PM ET

📍 NGP VAN, 1445 New York Ave NW, Washington, DC 20005

Join us at campaign headquarters to help call supporters!



Take future action with a single click.  
Log in or Sign up for FastAction



### Contact Information

First Name  Last Name

Street Address (Optional)

Postal Code  City (Optional)  State/Province (Optional)

Email  Home Phone

Did you mean [example@gmail.com?](#)

Remember me so that I can use FastAction next time. 🗑️

### Select Shifts

- Shift 1: 10:00 AM - 12:00 PM
- Shift 2: 12:00 PM - 2:00 PM
- Shift 3: 2:00 PM - 4:00 PM

# 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.



# Q & A



# Additional Resources

# Support

- Contact your System Administrator
- Email [help@EveryAction.com](mailto: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](#)



Thank You for Attending!

