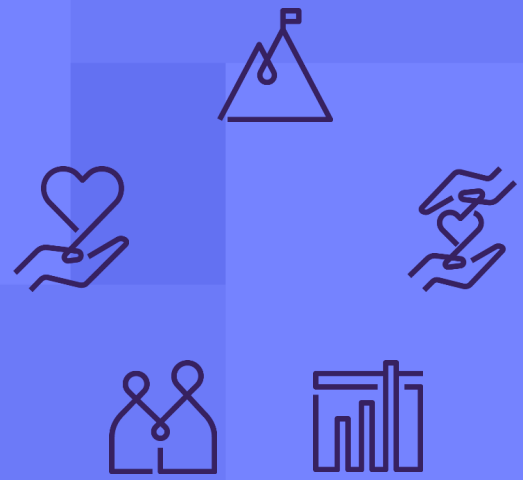
DONOR ENGAGEMENT

Managing Event Participation



Bonterra™

Introduction & Learning Objective

Bonterra™

Meet your Trainer...

Dan Mathias

Training Specialist

Donor Engagement

EveryAction

Bonterra™

Agenda

Bonterra™

Agenda

1. Scheduling People for an Event
2. Creating Event Signup Templates
3. Creating Event Signup Forms
4. Q&A

Scheduling People for an Event

Bonterra™

Scheduling People for an Event

Within your database, there are several ways to schedule people for the events that you create, including through:

- Manual entry
- Bulk Upload
- From a script
- Data Entry Forms
- Online Actions Forms
- And the Zoom Integration

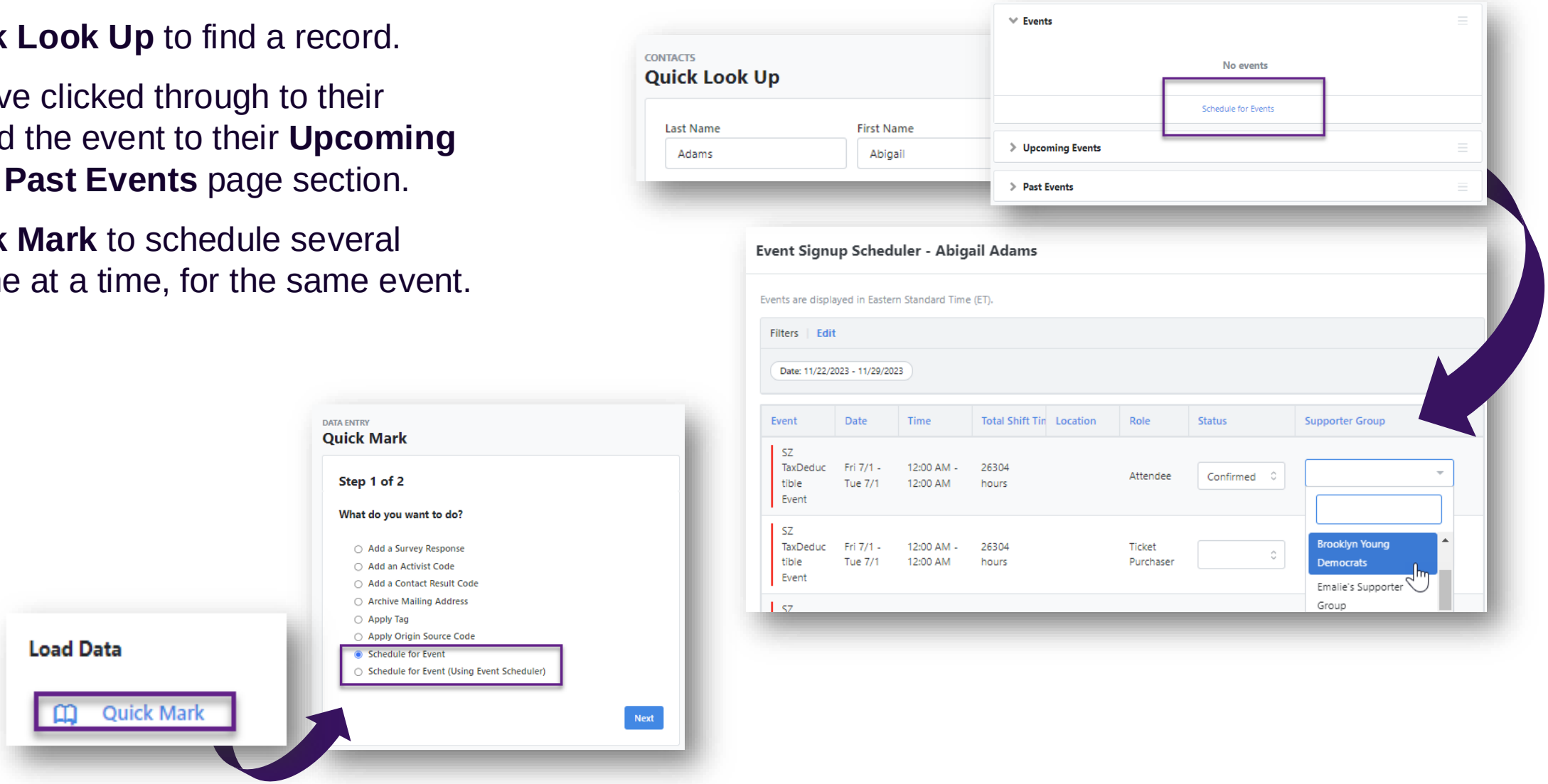
In addition, tools such as creating **Event Signup Templates** and using the **Event Attendee Check-In** are tools that we will cover in this webinar on Event People Management.

Manually Scheduling People for an Event

Use **Quick Look Up** to find a record.

Once you've clicked through to their record, add the event to their **Upcoming Events** or **Past Events** page section.

Use **Quick Mark** to schedule several people, one at a time, for the same event.



Using Bulk Upload to Schedule People for an Event

You can use the **Bulk Upload Wizard** to schedule groups of people for events at once.

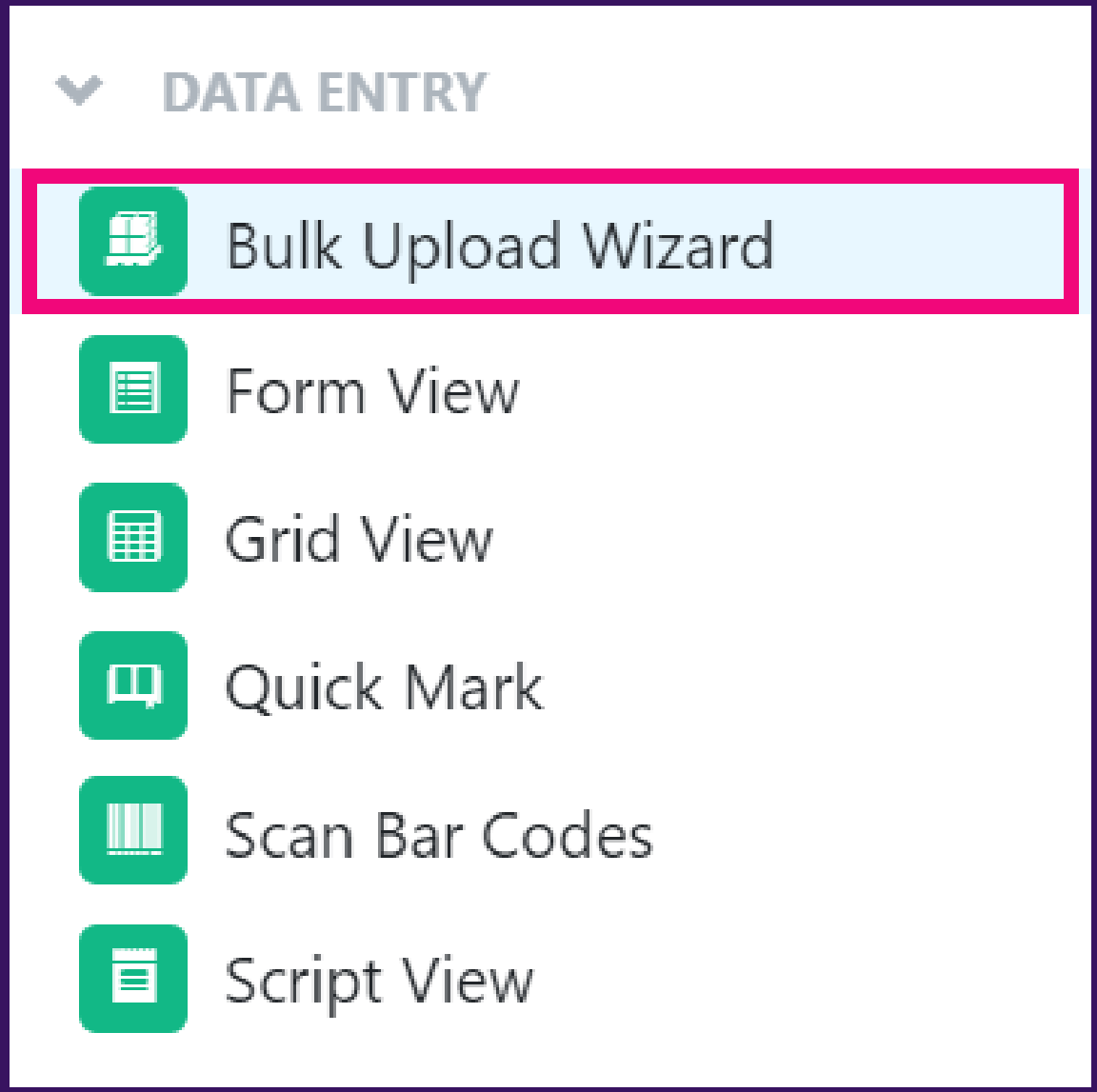
Bulk actions are efficient ways to **update and manage your contact records**.

Use **Bulk Upload** to load files into the database to **create new records or update existing ones**.

Use **Bulk Apply** to **add or update the same value to a group of contacts** through Create a list.

For example, if you have a list of contacts you wish to schedule for an event and want to update their records to reflect event participation, perform a bulk upload with the Bulk Upload Wizard.

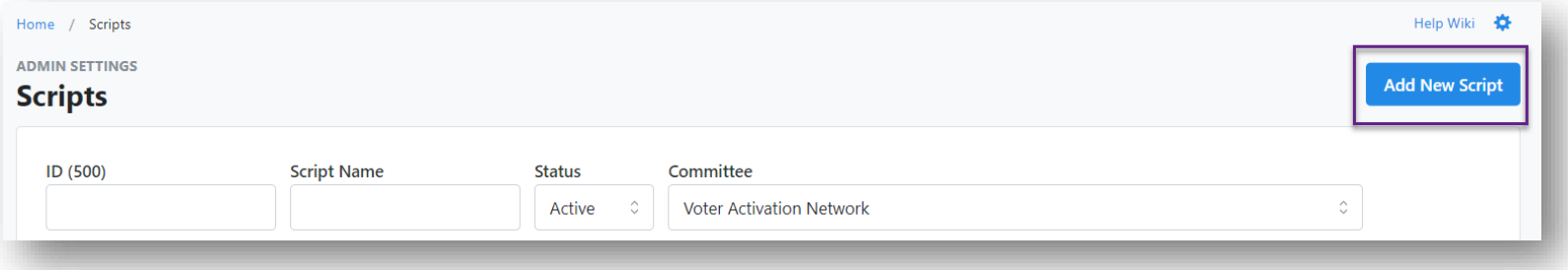
If you have a list of contacts that share the event participation, update their records by selecting Bulk Apply in My List.

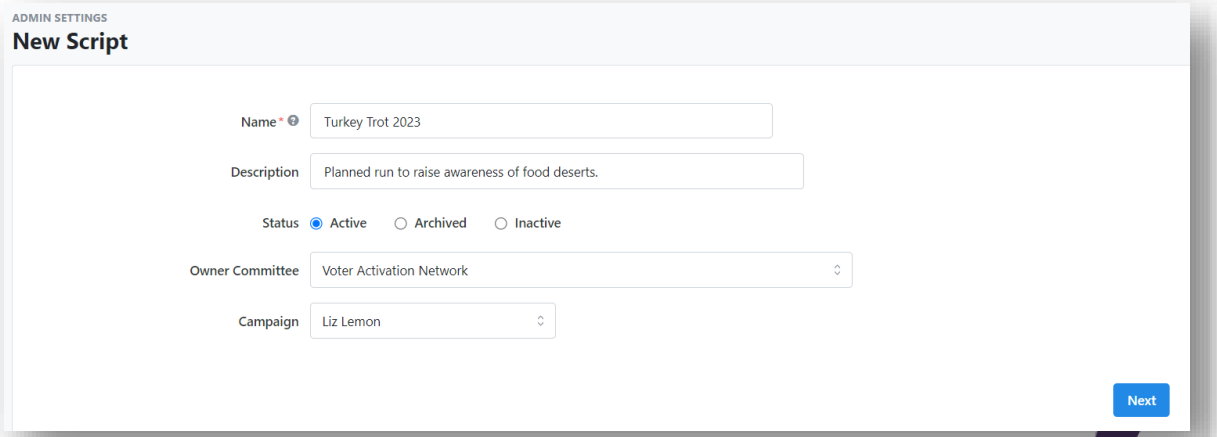


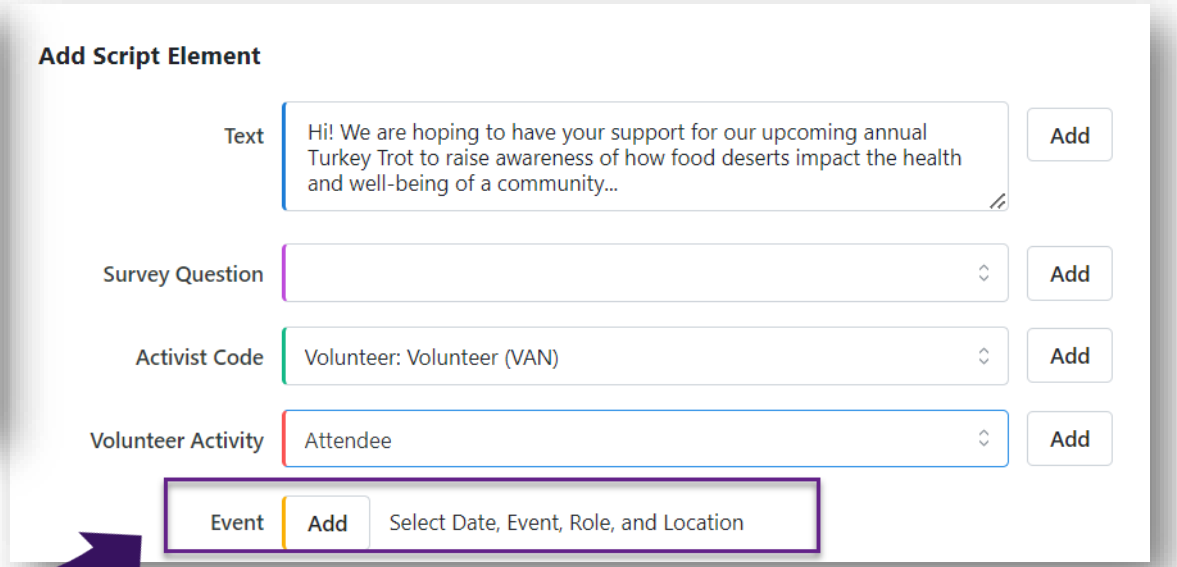
Bonterra

Using Scripts to Schedule People from an Event

You can add **Calendar Events** to **Scripts** so that people can be scheduled for events through canvassing or phonebank outreach.







Bonterra

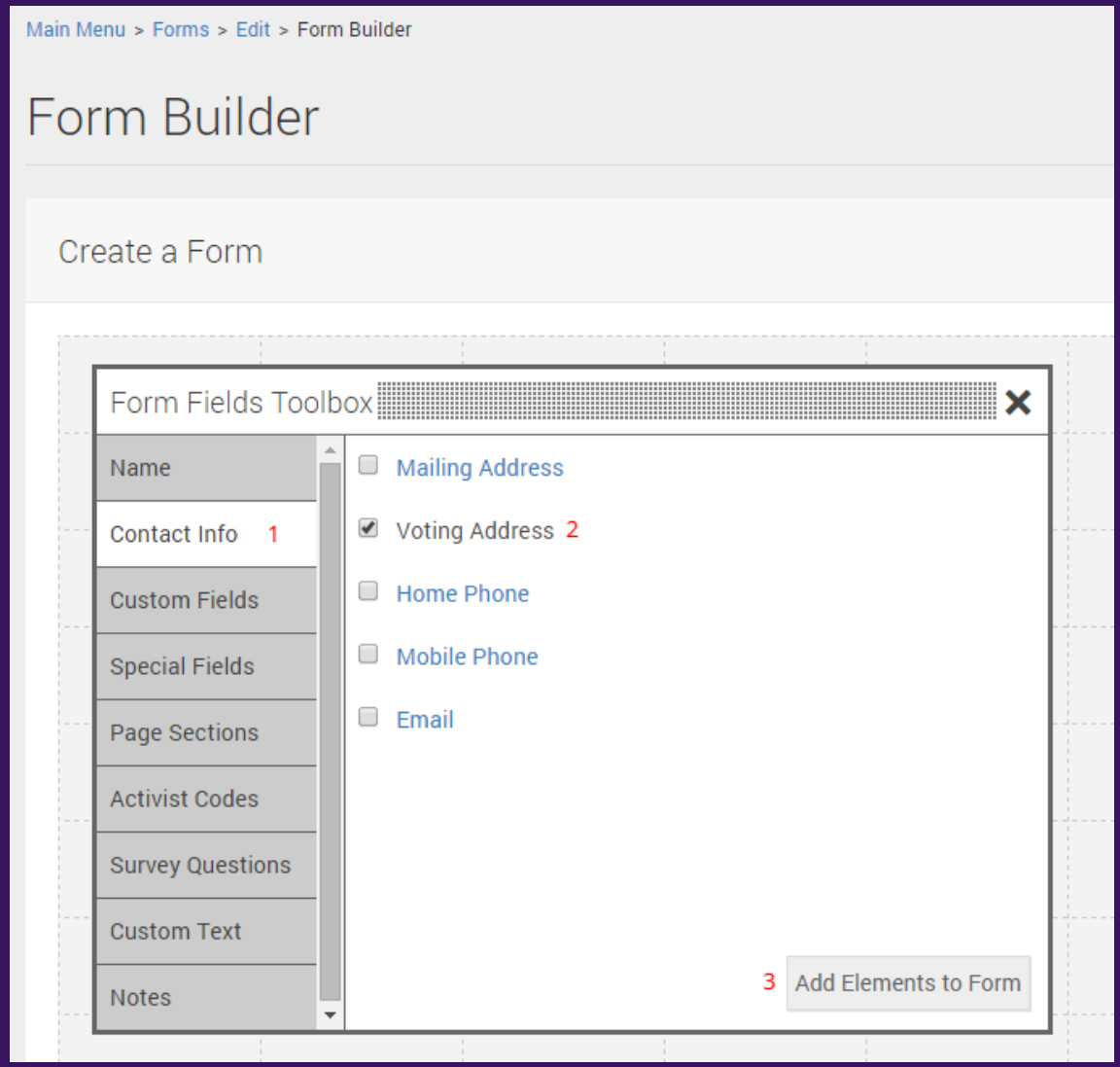
Using Data Entry Forms to Schedule People for an Event

You can use a Data Entry Form when creating new contact records and scheduling those contacts for an event at the same time.

Events can be added to these forms.

These forms can then be used to collect responses, such as:

- Support
- Attendance
- Participation



Bonterra

Using Online Actions Forms to Schedule People for an Event

You can publish an **Event Signup** form or track activity from a supporter's **Hosted Event.**

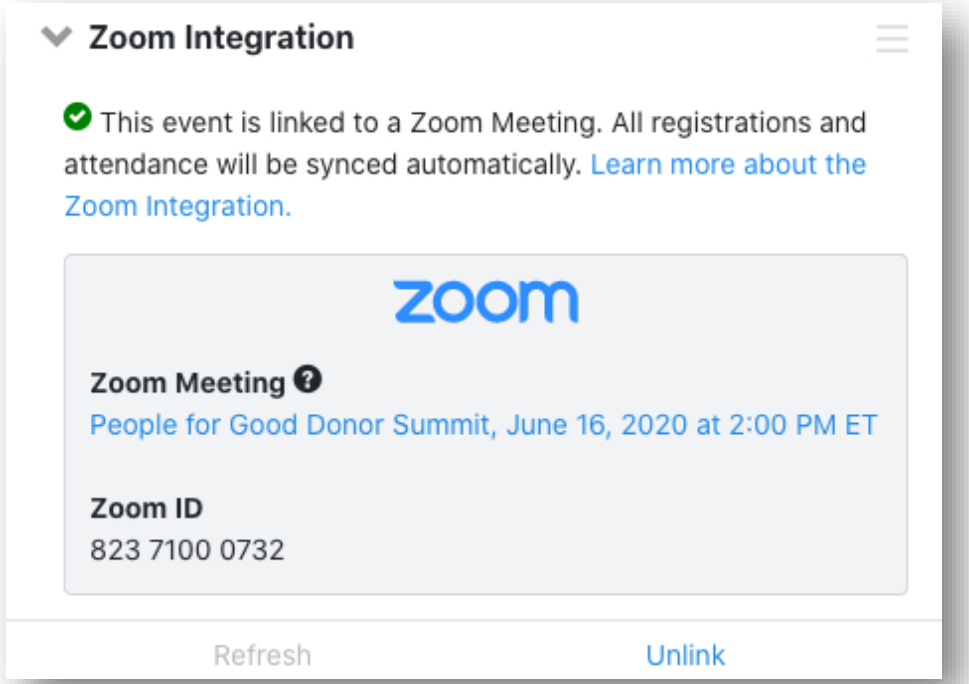
Updating a person's attendance status from scheduled, to confirmed, completed or no show, for example, can be done through the methods listed above, or via the **Event Participants List** page.

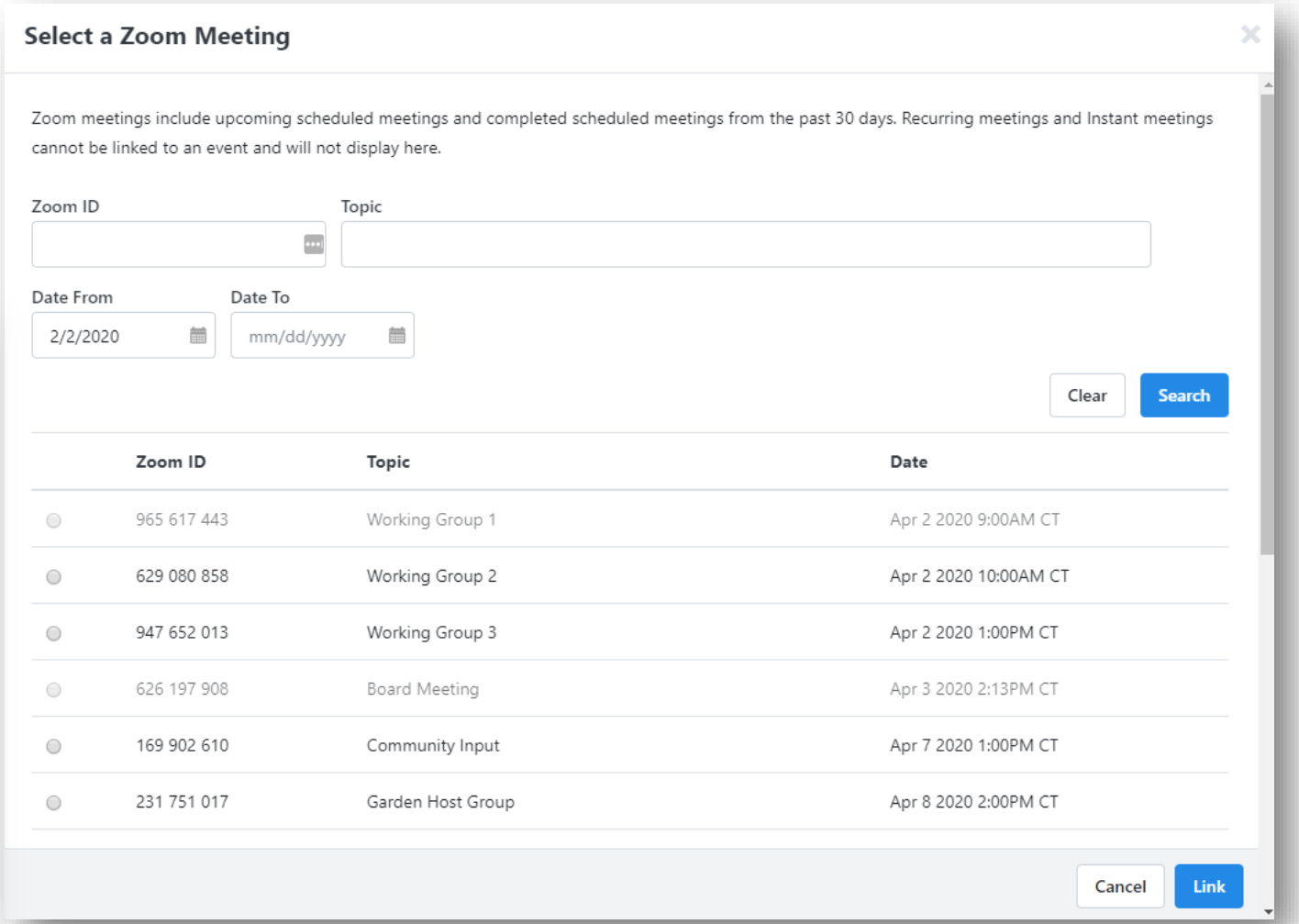
It's generally a good idea to record **Contact History** along with **Event Status** changes, but this is optional.

Bonterra™

Using Zoom Integration to Sync your Attendees

If you are creating Online Events using Zoom, you can use our add-on Zoom integration which will automatically synch your registered attendees with your participant list.





Creating Event Signup Templates

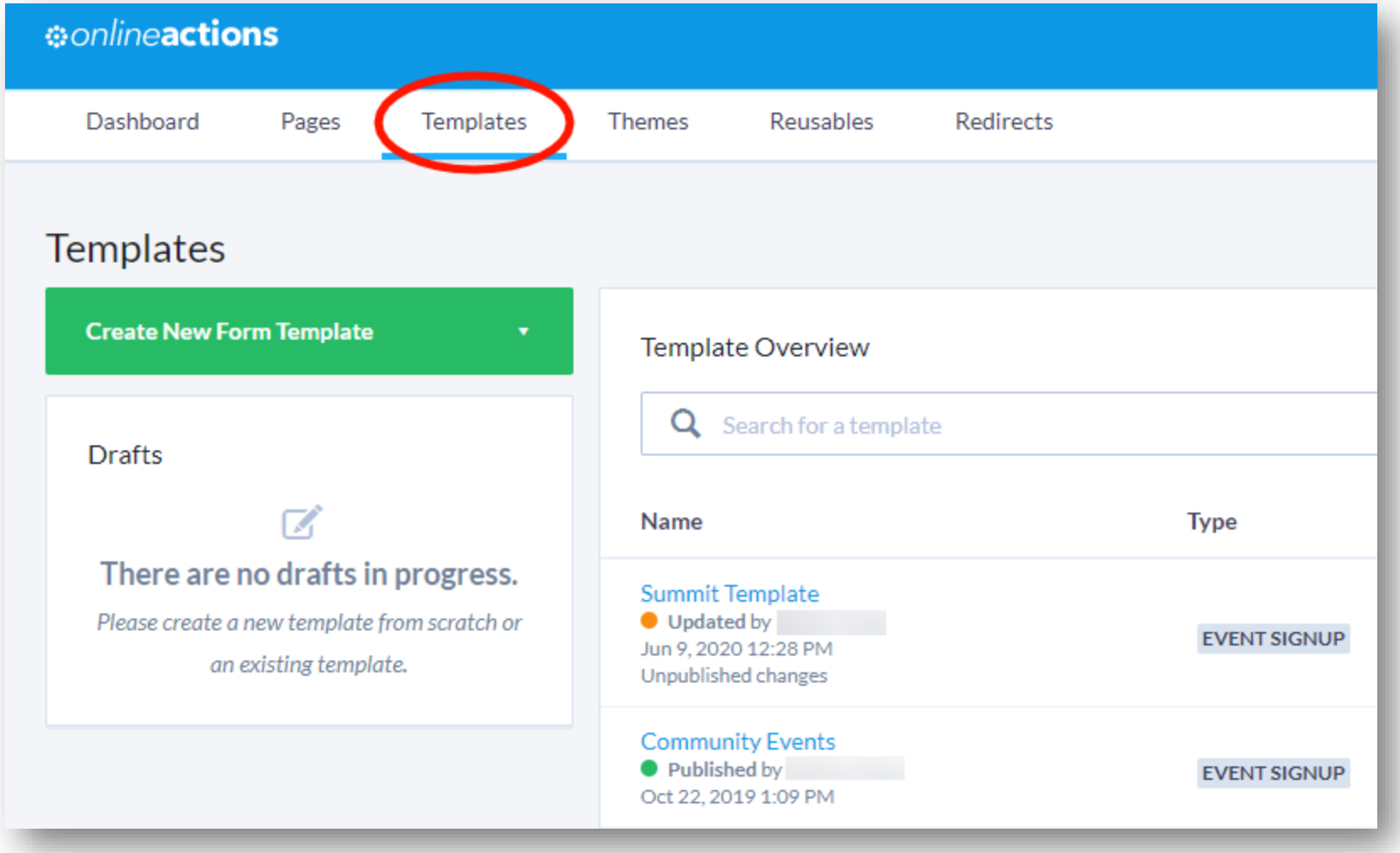
Bonterra™

Creating an Event Signup Template

You may want to create and save an **Event Signup Template** to streamline and standardize your **Event Signup Forms** for your organization.

To create a template:

Navigate to the **Templates** tab in **Online Actions**, where you can see the option to **Create New Form Template.**



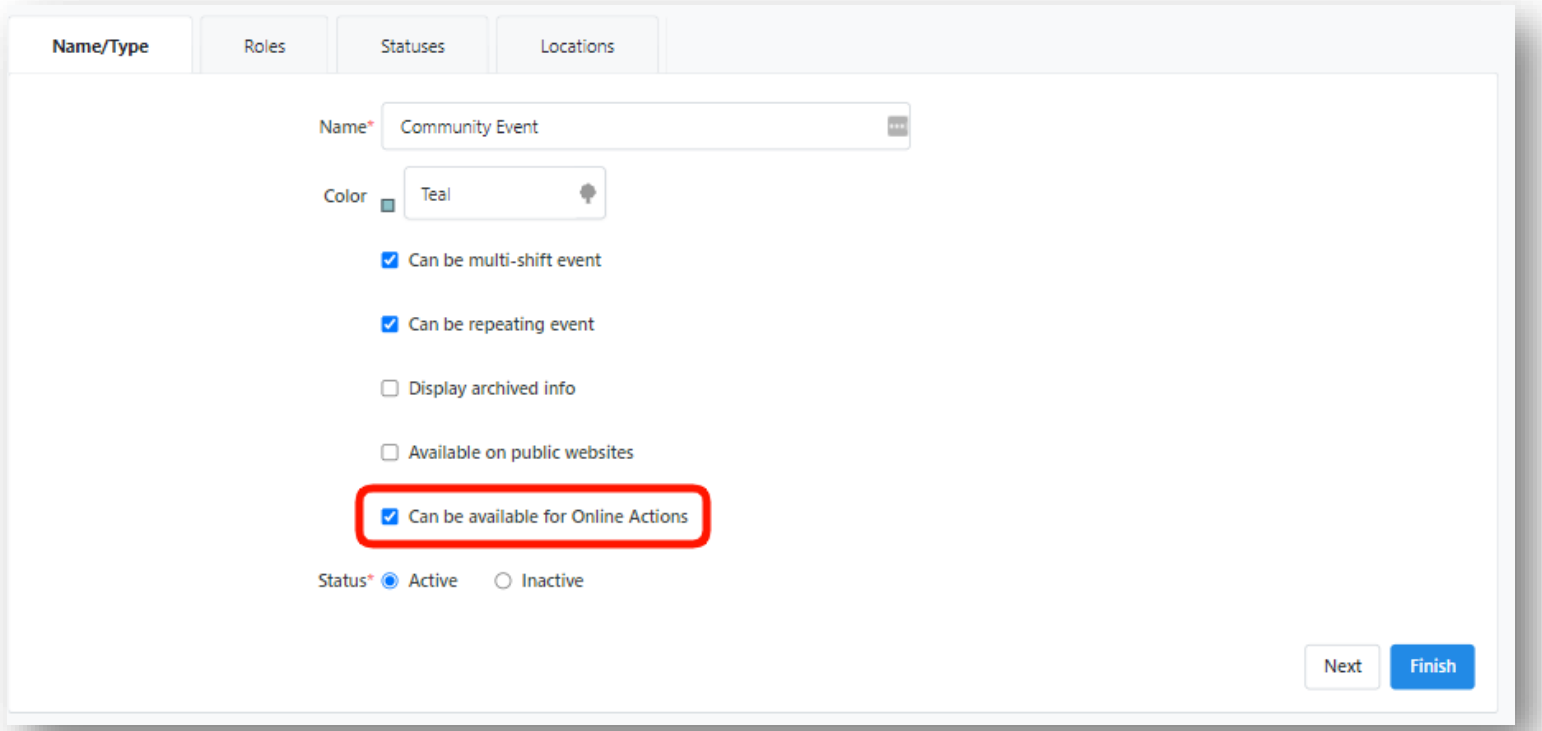
Creating Event Signup Forms

Bonterra™

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.

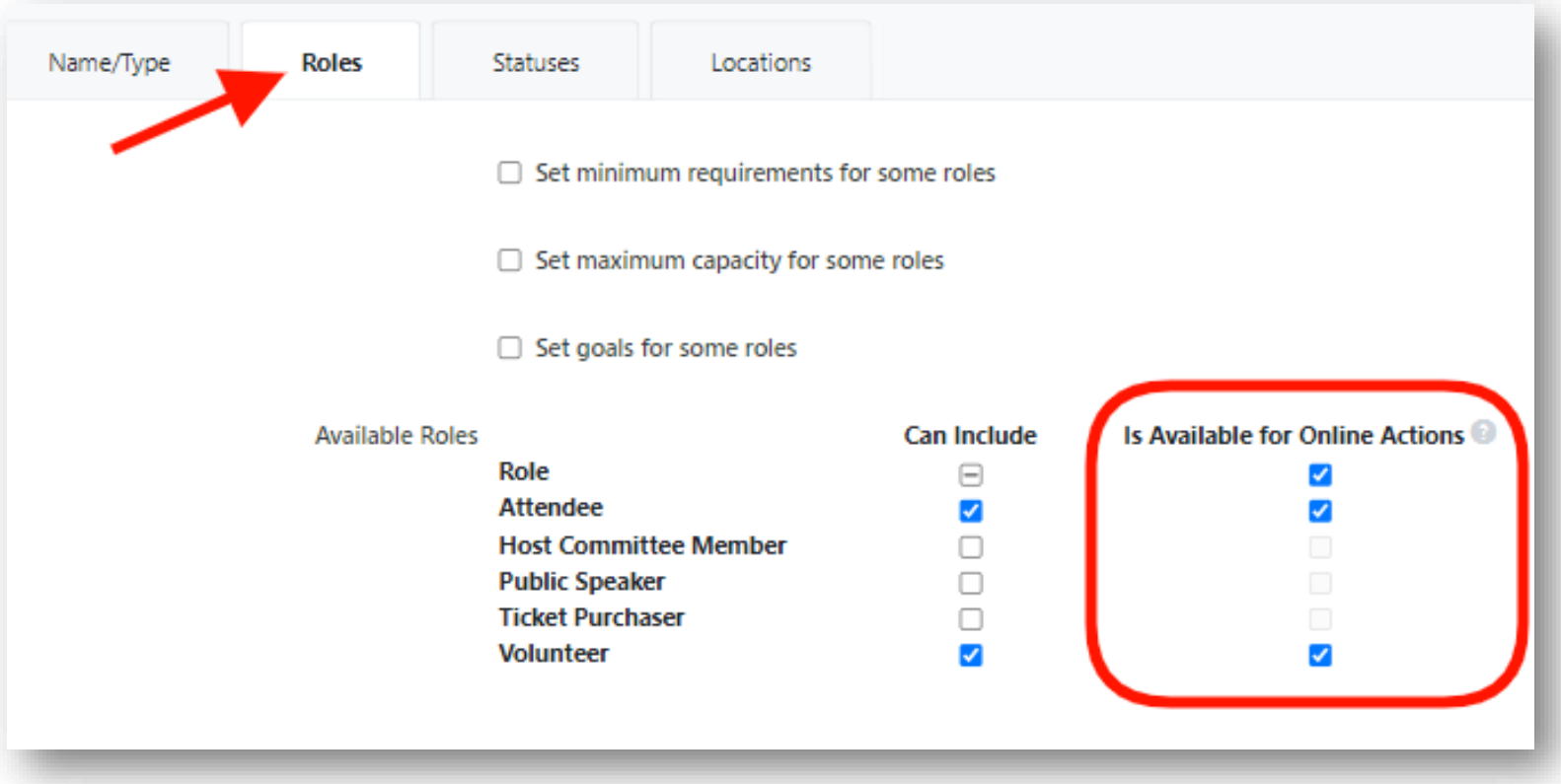
Search Event Types, select the one you want, and **check Can be available for Online Actions** box.



Bonterra

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**.

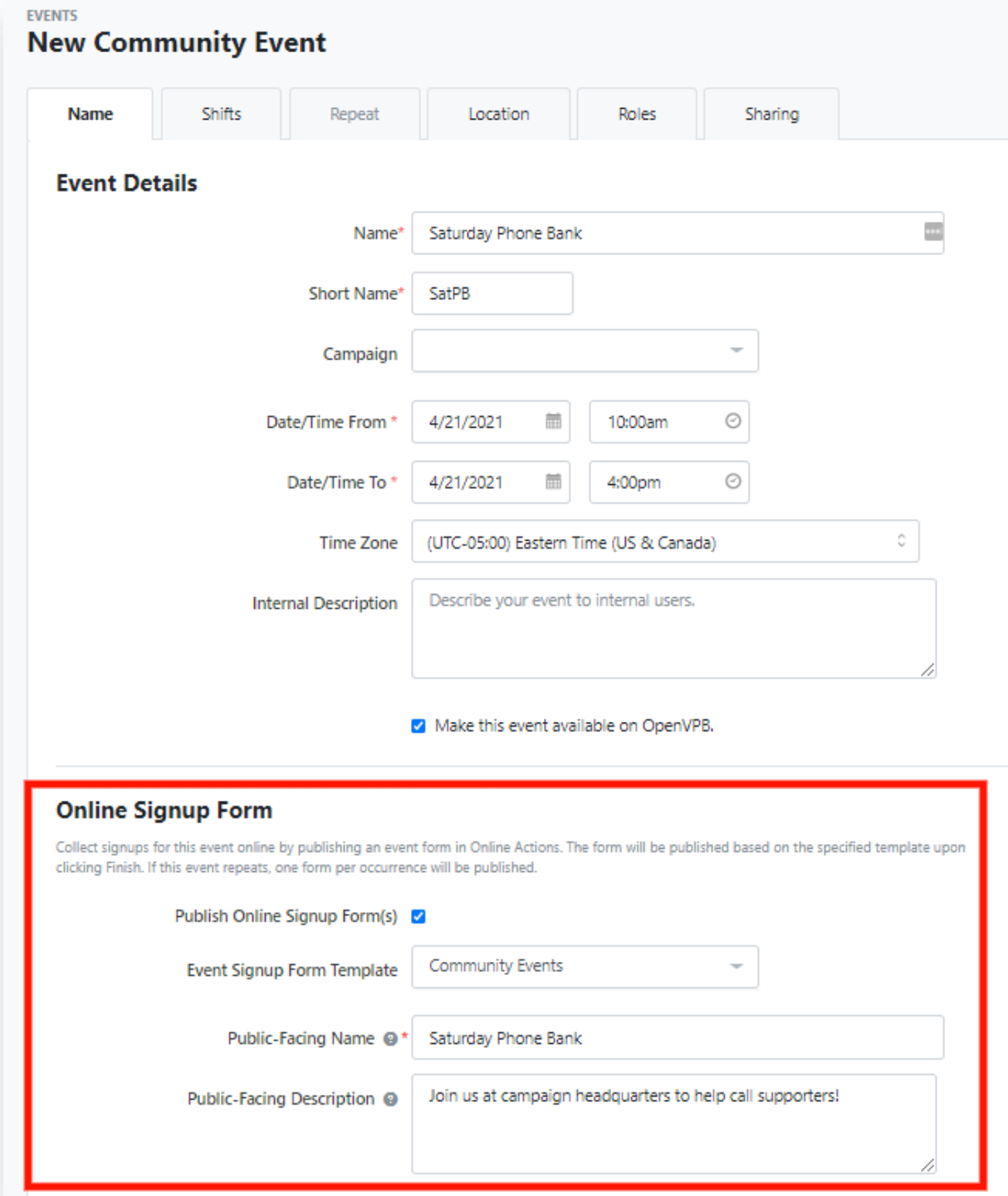


Publishing your form

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.



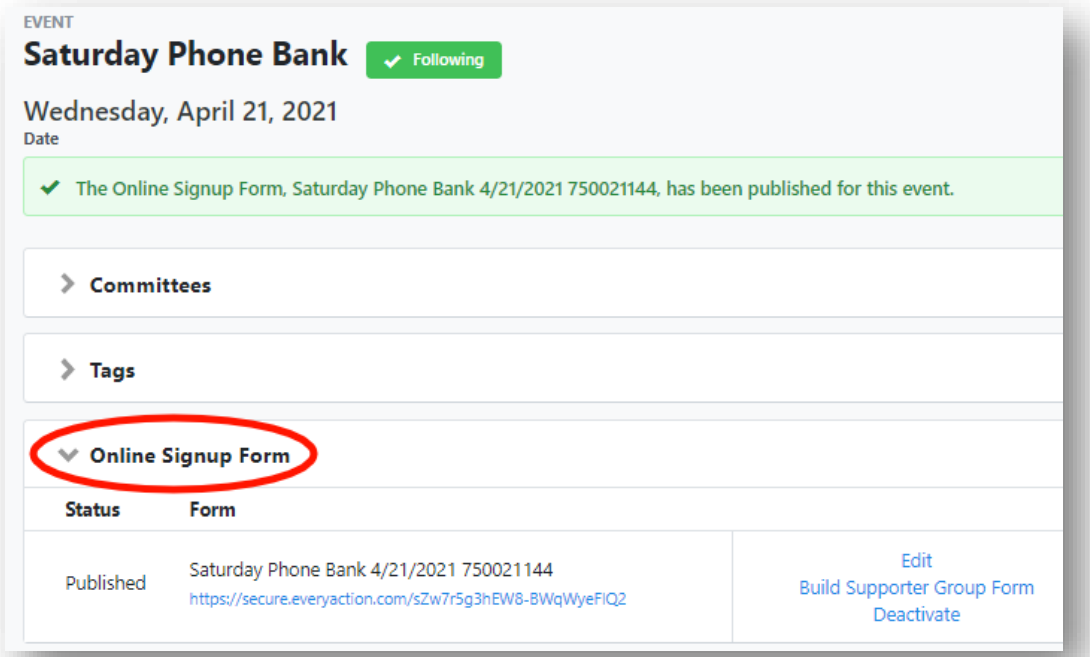
Bonterra

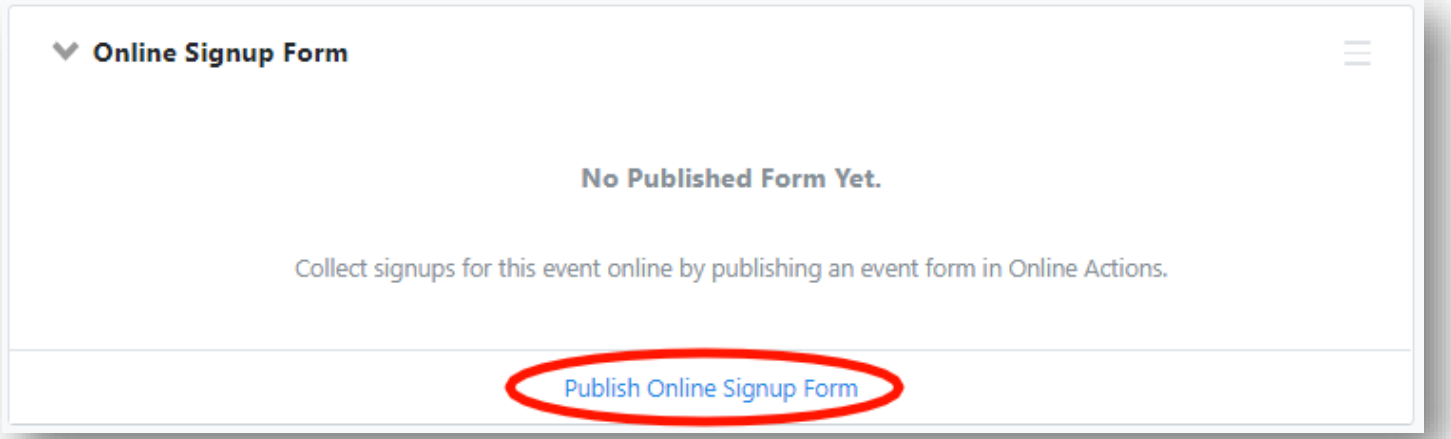
Publishing your Event

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.

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



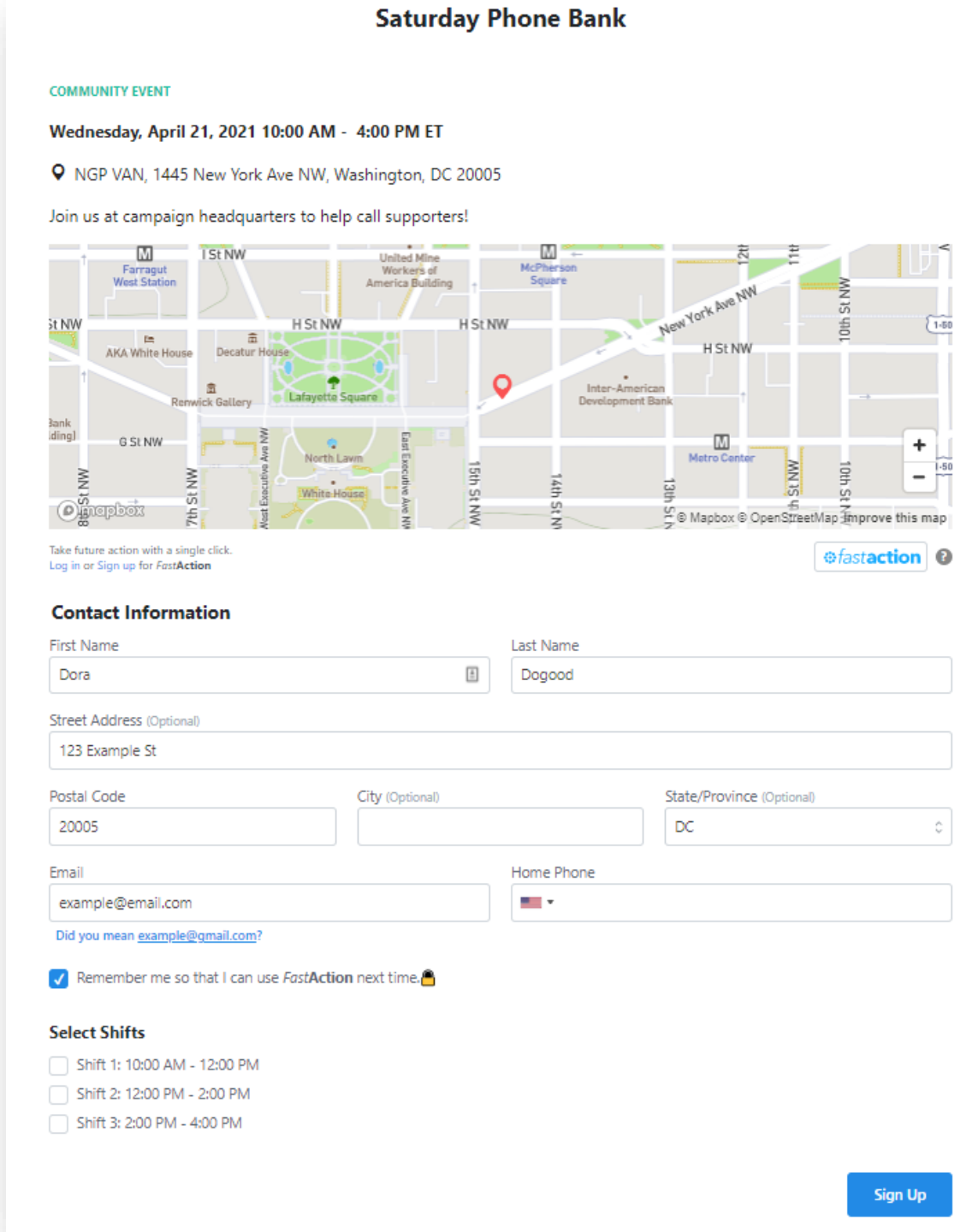


Bonterra

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.



Bonterra

Q&A

Bonterra™

Q & A

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.

Bonterra™

Additional Resources

Bonterra™

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

Bonterra™

Help Center Resources

- How to: Schedule people for an Event
- How to: Use Quick Mark
- How to: Update records using Bulk Uploader and Bulk Apply
- How to: Create a Data Entry Form
- Tutorial: Creating Event Signup forms
- How to: Set up and use the Zoom integration for your Events
- How to: Create Event Signup Templates
- How to: Create an Event Signup Form

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

Bonterra™

Thank You for Attending!

Bonterra™