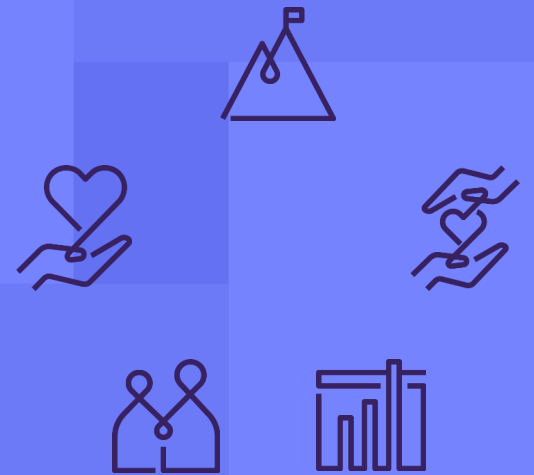


DONOR ENGAGEMENT

Managing Event Participation



Introduction & Learning Objective

Meet your Trainer...

Dan Mathias

Training Specialist

Donor Engagement

EveryAction



Agenda

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

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.

CONTACTS
Quick Look Up

Last Name: Adams | First Name: Abigail

Events: No events
[Schedule for Events](#)

> Upcoming Events
> Past Events

Event Signup Scheduler - Abigail Adams

Events are displayed in Eastern Standard Time (ET).

Filters | Edit
Date: 11/22/2023 - 11/29/2023

Event	Date	Time	Total Shift Time	Location	Role	Status	Supporter Group
SZ TaxDeduction Event	Fri 7/1 - Tue 7/1	12:00 AM - 12:00 AM	26304 hours		Attendee	Confirmed	Brooklyn Young Democrats
SZ TaxDeduction Event	Fri 7/1 - Tue 7/1	12:00 AM - 12:00 AM	26304 hours		Ticket Purchaser		Emalie's Supporter Group

DATA ENTRY
Quick Mark

Step 1 of 2

What do you want to do?

- Add a Survey Response
- Add an Activist Code
- Add a Contact Result Code
- Archive Mailing Address
- Apply Tag
- Apply Origin Source Code
- Schedule for Event
- Schedule for Event (Using Event Scheduler)

Next

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.

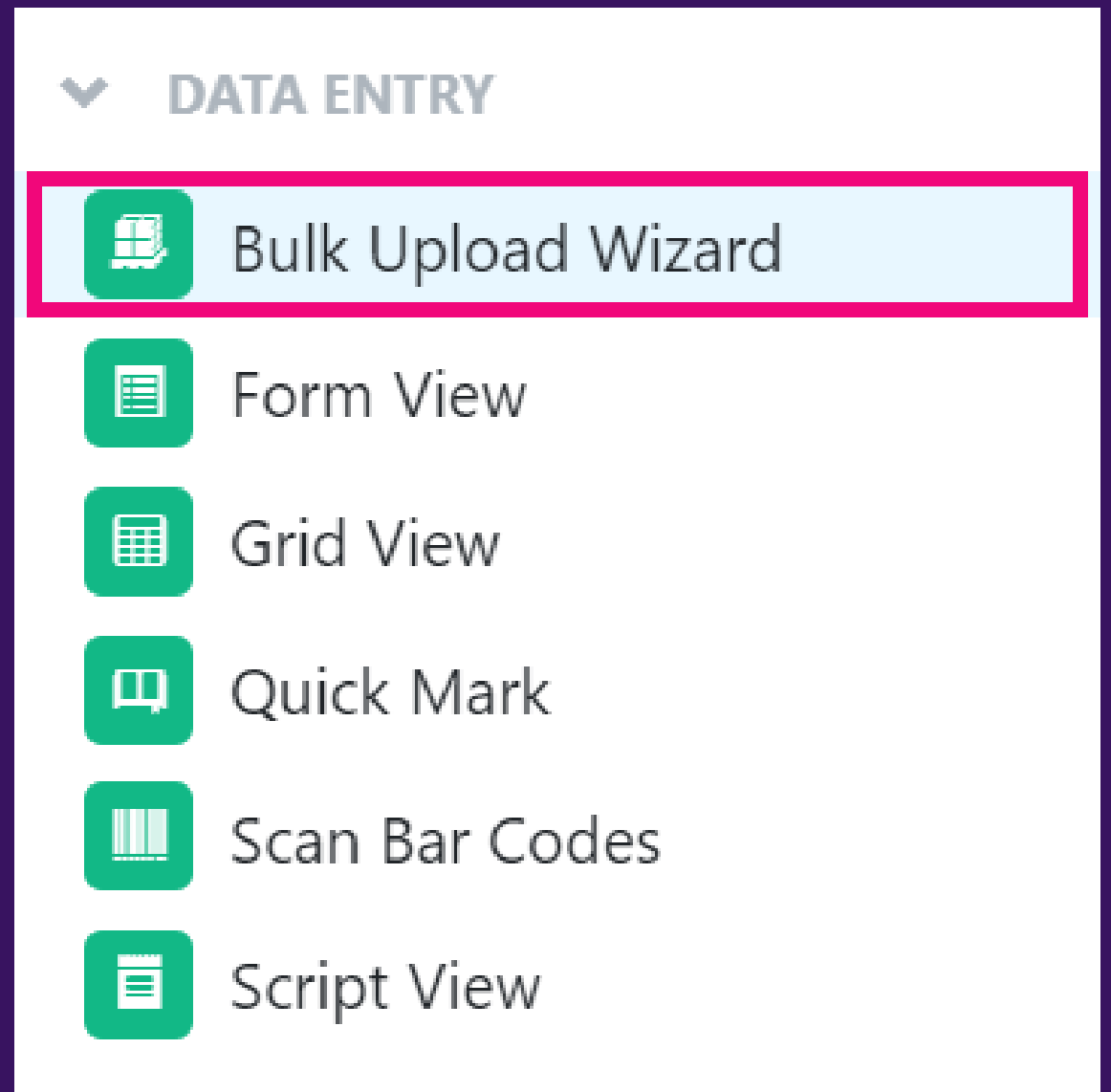
Bulk actions are efficient ways to **update and manage your contact records**.

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.



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.

Home / Scripts Help Wiki ⚙️

ADMIN SETTINGS

Scripts

ID (500)	Script Name	Status	Committee
<input type="text"/>	<input type="text"/>	Active ▾	Voter Activation Network ▾

Add New Script

ADMIN SETTINGS

New Script

Name

Description

Status Active Archived Inactive

Owner Committee

Campaign

Next

Add Script Element

Text **Add**

Survey Question **Add**

Activist Code **Add**

Volunteer Activity **Add**

Event **Add** Select Date, Event, Role, and Location

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

The screenshot shows the 'Form Builder' interface. At the top, there is a breadcrumb trail: 'Main Menu > Forms > Edit > Form Builder'. Below this, the title 'Form Builder' is displayed. A button labeled 'Create a Form' is visible. The main area is a 'Form Fields Toolbox' window with a close button (X) in the top right corner. The toolbox is divided into two columns. The left column contains a list of field categories: 'Name', 'Contact Info 1', 'Custom Fields', 'Special Fields', 'Page Sections', 'Activist Codes', 'Survey Questions', 'Custom Text', and 'Notes'. The right column contains a list of specific field types with checkboxes: 'Mailing Address' (unchecked), 'Voting Address 2' (checked), 'Home Phone' (unchecked), 'Mobile Phone' (unchecked), and 'Email' (unchecked). At the bottom right of the toolbox, there is a button labeled '3 Add Elements to Form'.

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.




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.

Zoom Integration

✔ This event is linked to a Zoom Meeting. All registrations and attendance will be synced automatically. [Learn more about the Zoom Integration.](#)



Zoom Meeting ⓘ
People for Good Donor Summit, June 16, 2020 at 2:00 PM ET

Zoom ID
823 7100 0732

Refresh [Unlink](#)

Select a Zoom Meeting

Zoom meetings include upcoming scheduled meetings and completed scheduled meetings from the past 30 days. Recurring meetings and Instant meetings cannot be linked to an event and will not display here.

Zoom ID Topic

Date From Date To

[Clear](#) [Search](#)

	Zoom ID	Topic	Date
<input type="radio"/>	965 617 443	Working Group 1	Apr 2 2020 9:00AM CT
<input type="radio"/>	629 080 858	Working Group 2	Apr 2 2020 10:00AM CT
<input type="radio"/>	947 652 013	Working Group 3	Apr 2 2020 1:00PM CT
<input type="radio"/>	626 197 908	Board Meeting	Apr 3 2020 2:13PM CT
<input type="radio"/>	169 902 610	Community Input	Apr 7 2020 1:00PM CT
<input type="radio"/>	231 751 017	Garden Host Group	Apr 8 2020 2:00PM CT

[Cancel](#) [Link](#)

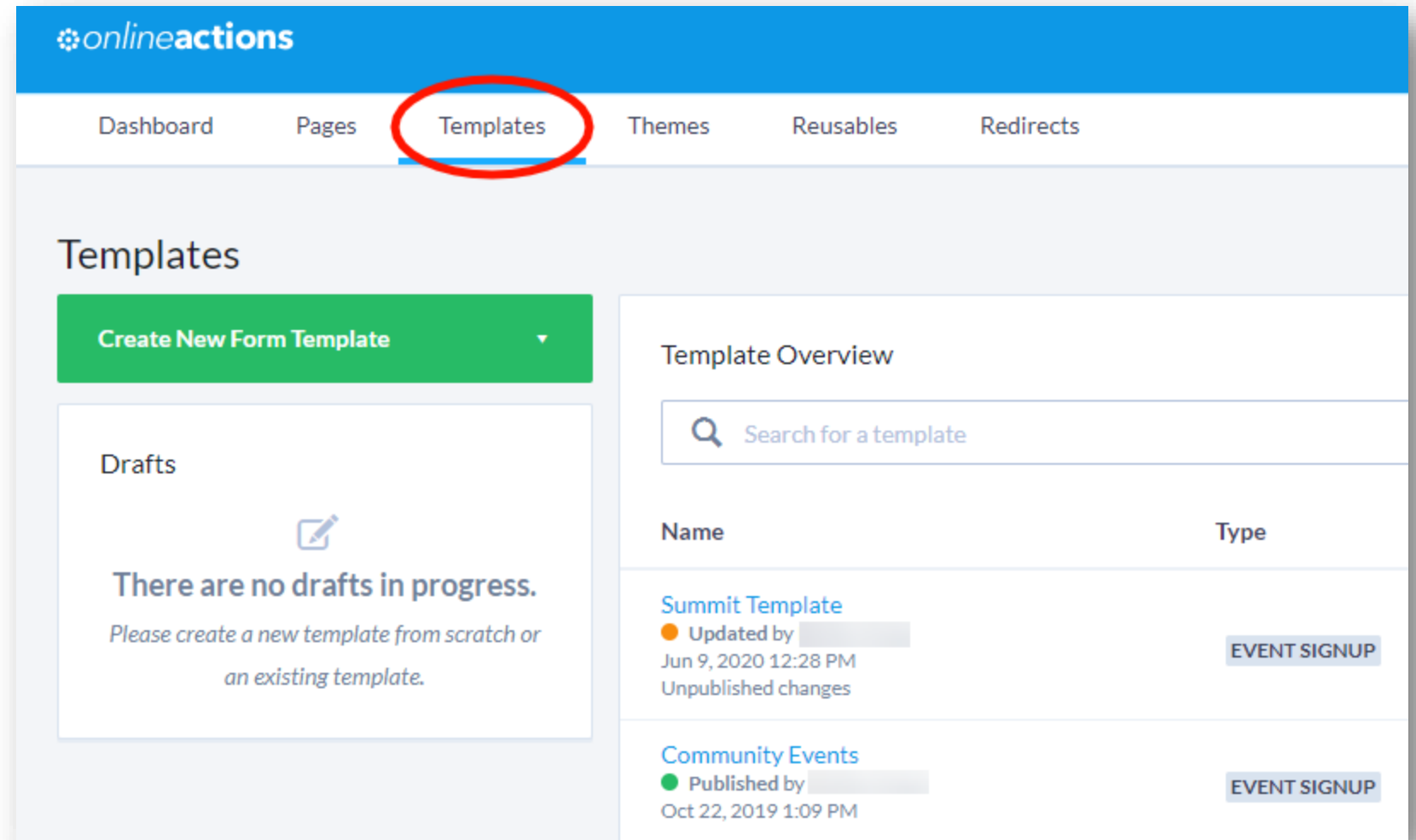
Creating Event Signup Templates

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**.



The screenshot displays the 'onlineactions' web interface. The navigation bar at the top includes 'Dashboard', 'Pages', 'Templates' (highlighted with a red circle), 'Themes', 'Reusables', and 'Redirects'. Below the navigation bar, the 'Templates' section is active, featuring a green 'Create New Form Template' button. A 'Drafts' section shows a message: 'There are no drafts in progress. Please create a new template from scratch or an existing template.' To the right, a 'Template Overview' section contains a search bar and a table of templates.

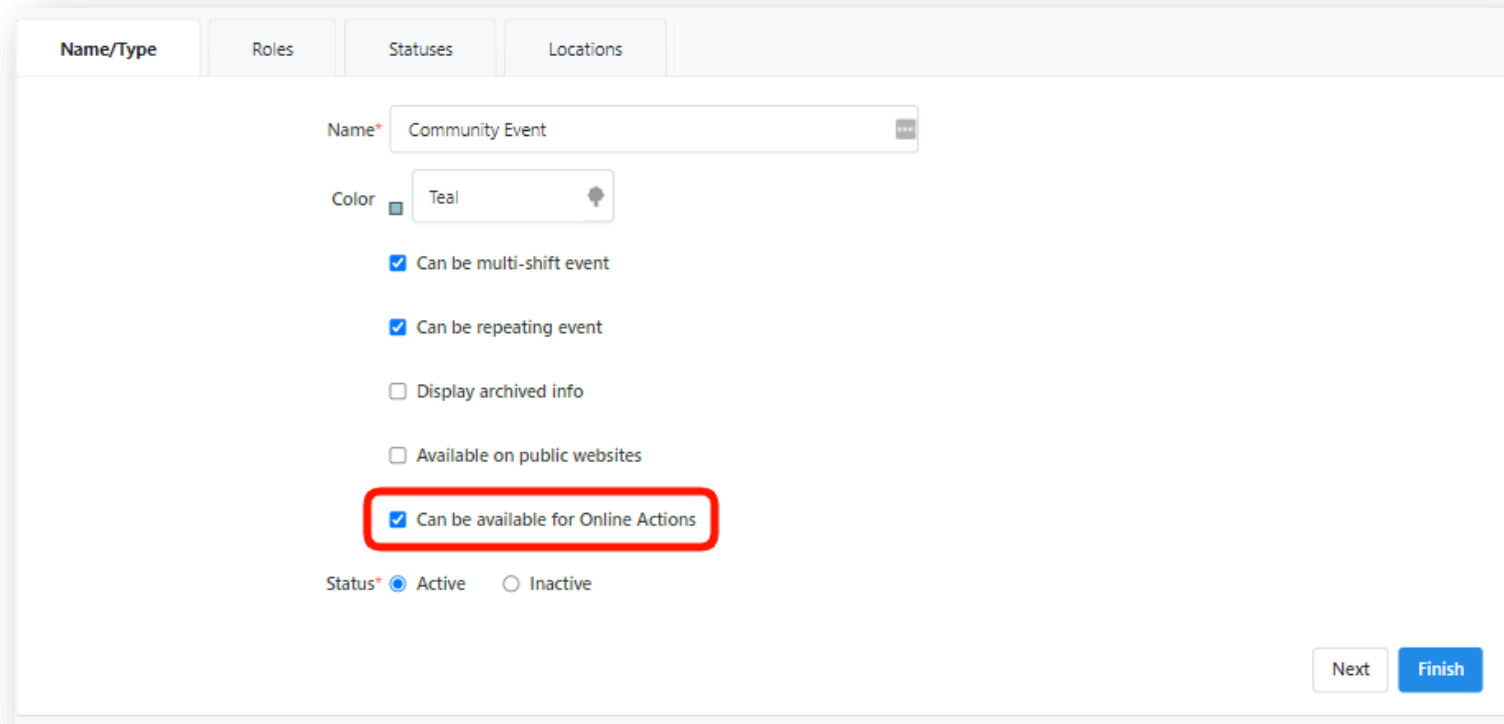
Name	Type
Summit Template ● Updated by [redacted] Jun 9, 2020 12:28 PM Unpublished changes	EVENT SIGNUP
Community Events ● Published by [redacted] Oct 22, 2019 1:09 PM	EVENT SIGNUP

Creating Event Signup Forms

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.



The screenshot shows a form for creating an event type. The form has tabs for 'Name/Type', 'Roles', 'Statuses', and 'Locations'. The 'Name/Type' tab is active. The form fields are:

- Name*: Community Event
- Color: 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*: Active Inactive

At the bottom right, there are 'Next' and 'Finish' buttons.

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 event management system. The interface includes a navigation bar with tabs for 'Name/Type', 'Roles', 'Statuses', and 'Locations'. Below the navigation bar, 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 divided into two columns: 'Available Roles' and 'Can Include'. The 'Available Roles' column lists five roles: Attendee, Host Committee Member, Public Speaker, Ticket Purchaser, and Volunteer. The 'Can Include' column has checkboxes for each role, with 'Attendee' and 'Volunteer' checked. To the right of these columns is a column titled 'Is Available for Online Actions' with a help icon. This column is highlighted with a red rounded rectangle and contains checkboxes for each role, with 'Attendee' and 'Volunteer' checked.

Available Roles	Can Include	Is Available for Online Actions ?
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.

New Community Event

Name	Shifts	Repeat	Location	Roles	Sharing
Event Details					
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 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.

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 https://secure.everyaction.com/sZw7r5g3hEW8-8WqWyeFIQ2	Edit Build Supporter Group Form Deactivate

▼ **Online Signup Form**

No Published Form Yet.

Collect signups for this event online by publishing an event form in Online Actions.

[Publish Online Signup Form](#)

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	
<input type="text" value="Dora"/>	<input type="text" value="Dogood"/>	
Street Address (Optional)		
<input type="text" value="123 Example St"/>		
Postal Code	City (Optional)	State/Province (Optional)
<input type="text" value="20005"/>	<input type="text"/>	<input type="text" value="DC"/>
Email	Home Phone	
<input type="text" value="example@email.com"/>	<input type="text" value="🇺🇸"/>	

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

Q&A

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.



Additional Resources

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



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](#)



Thank You for Attending!

