DONOR ENGAGEMENT

Setting Up Your Ticketed Event

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Meet your Trainer...

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Donor Engagement

EveryAction

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Agenda

1. Ticketed Events Overview and Creation
2. Tracking and Searching on Ticketed Events
3. Ticketed Event Forms
4. Q&A

Ticketed Events Overview and Creation Workflow

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Ticketed Events

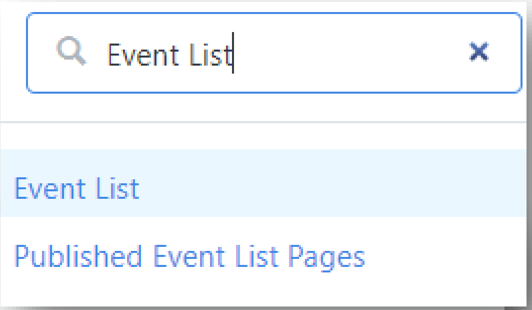
EveryAction's event management dashboard provides the ability to set goals, create host committees, manage house parties, show progress, manage invitees and tickets sold, and store historical information, like total amount raised.

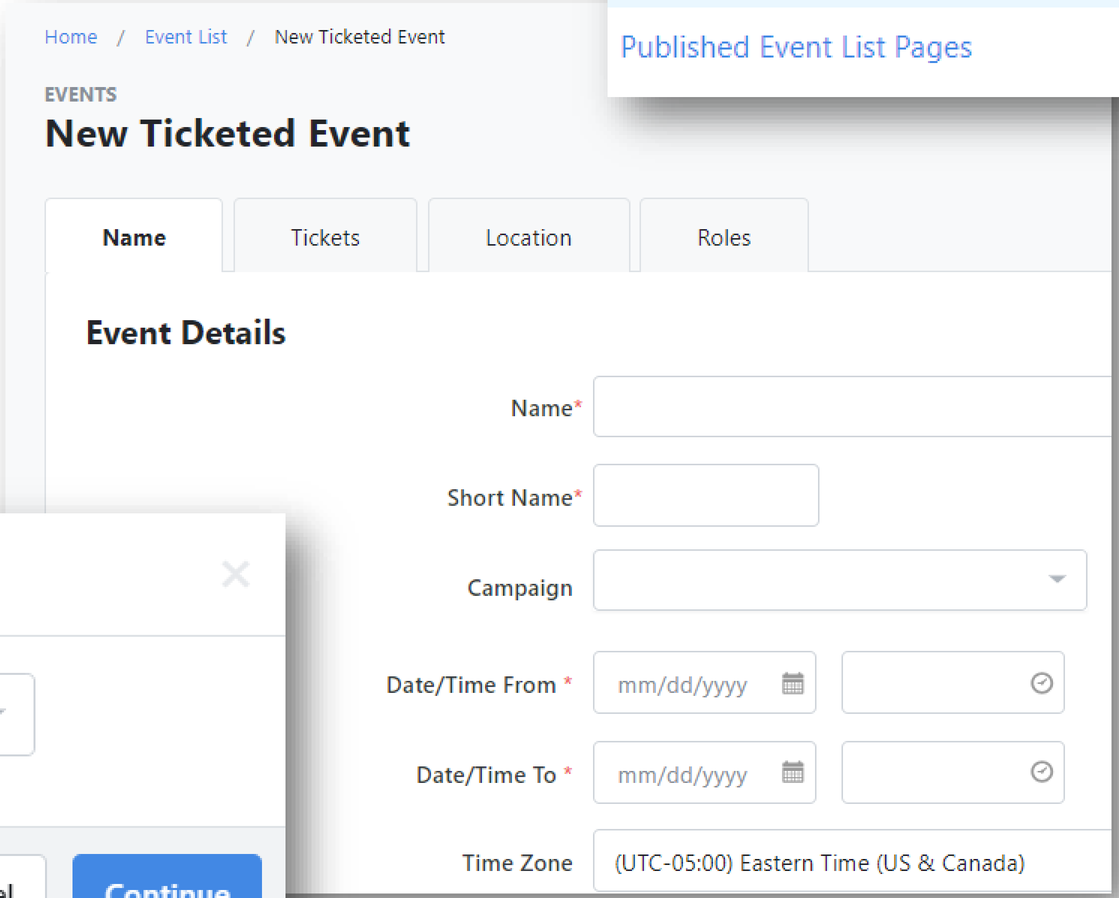
Ticketed Events:

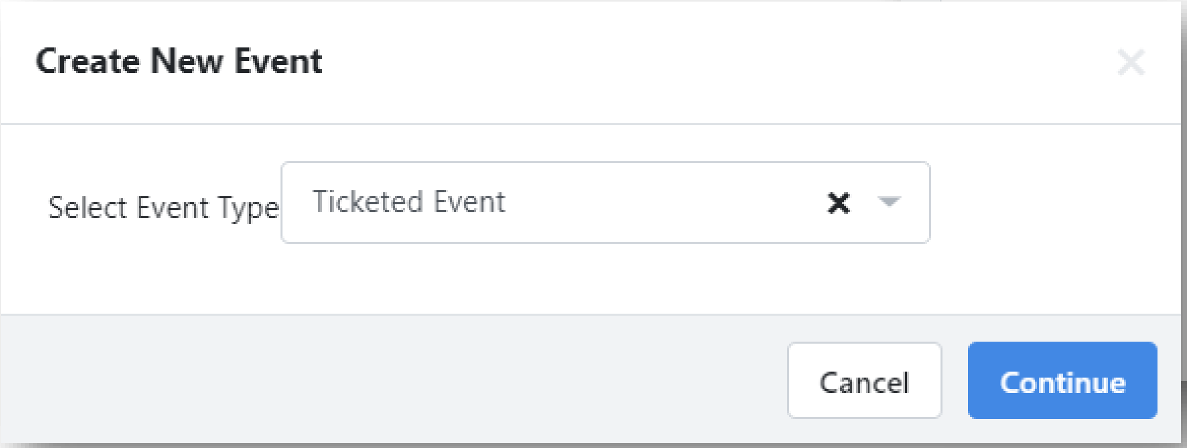
- Can be linked to Online Actions Forms which simplify sign ups and ticket purchases
- Online Action Forms can be tracked for compliance and disclosure reports
- Aligned with your Designations and Gateways, making payment processing a streamlined process

Creating a Ticketed Event

- Once you are ready to begin, click on **Event List** in the **Sidebar** or on the main menu.
- Select **Add New Event** and choose **Ticketed Event** for the Event Type. Then Continue
- The **Event Setup Wizard** will prompt you to add the basic details about your event



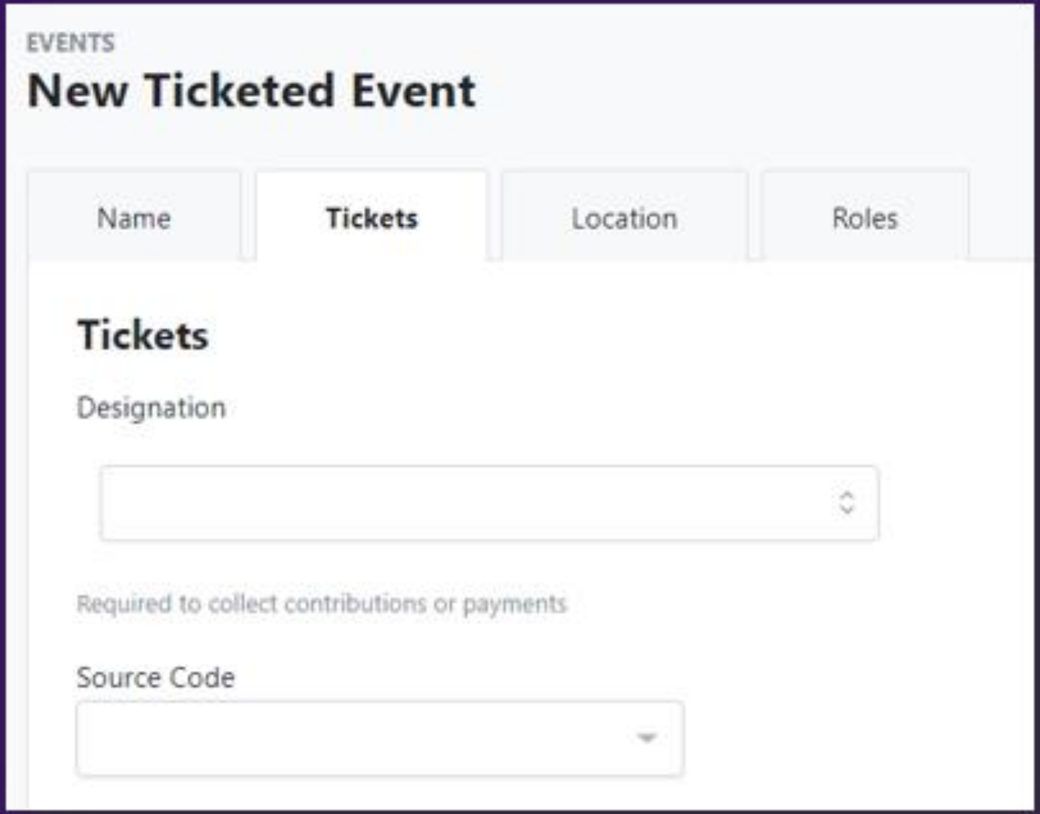




Adding Tickets

You can add tickets using the **Ticket** tab. You will first need to select your **Designation**. Adding a **Source Code** will help you track responses and contributions in your reporting.

You can then add the information for at least one ticket type. You can add as many as you need using **Create New Ticket.**



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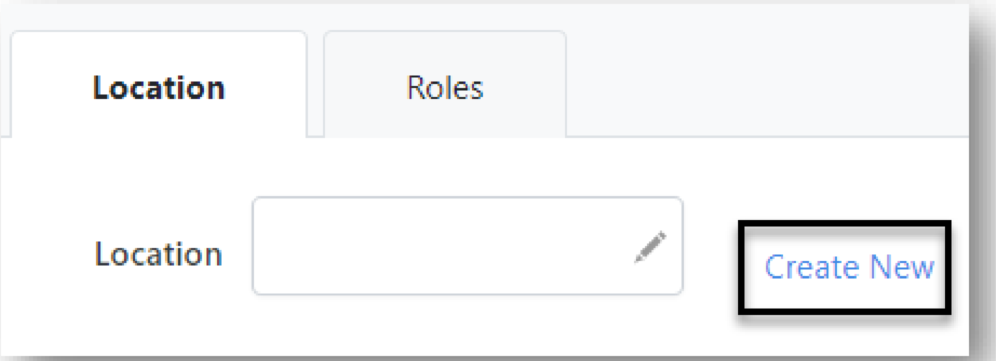
Adding Locations and Roles

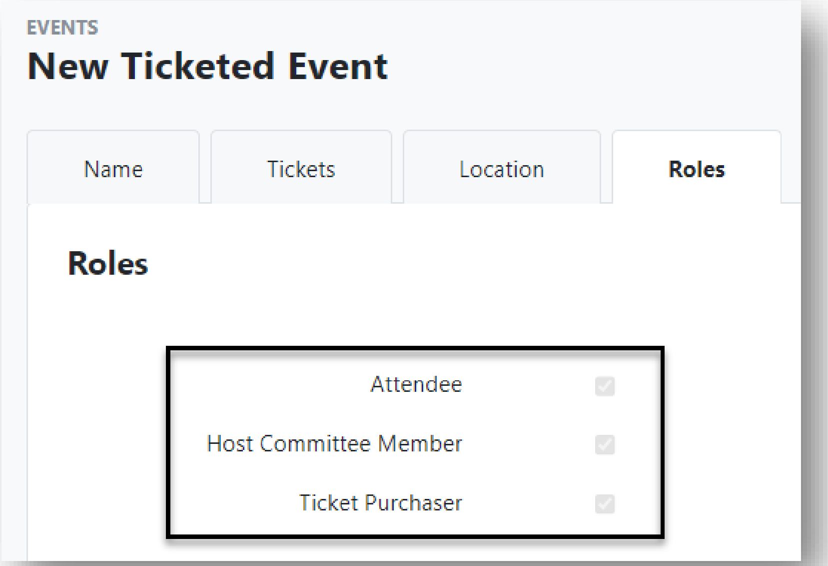
Adding Locations:

- Use the **Location** tab to choose one or more locations for the event
- You can select from previous entries using the dropdown or use the link to Create New

Adding Roles:

- **Event Roles** for Ticketed Events are set by default. You can choose which ones you want to appear on your Event Form using the Roles tab.
- When you select **Finish,** you will be taken to the Event Details page, where you can make further adjustments to the event.



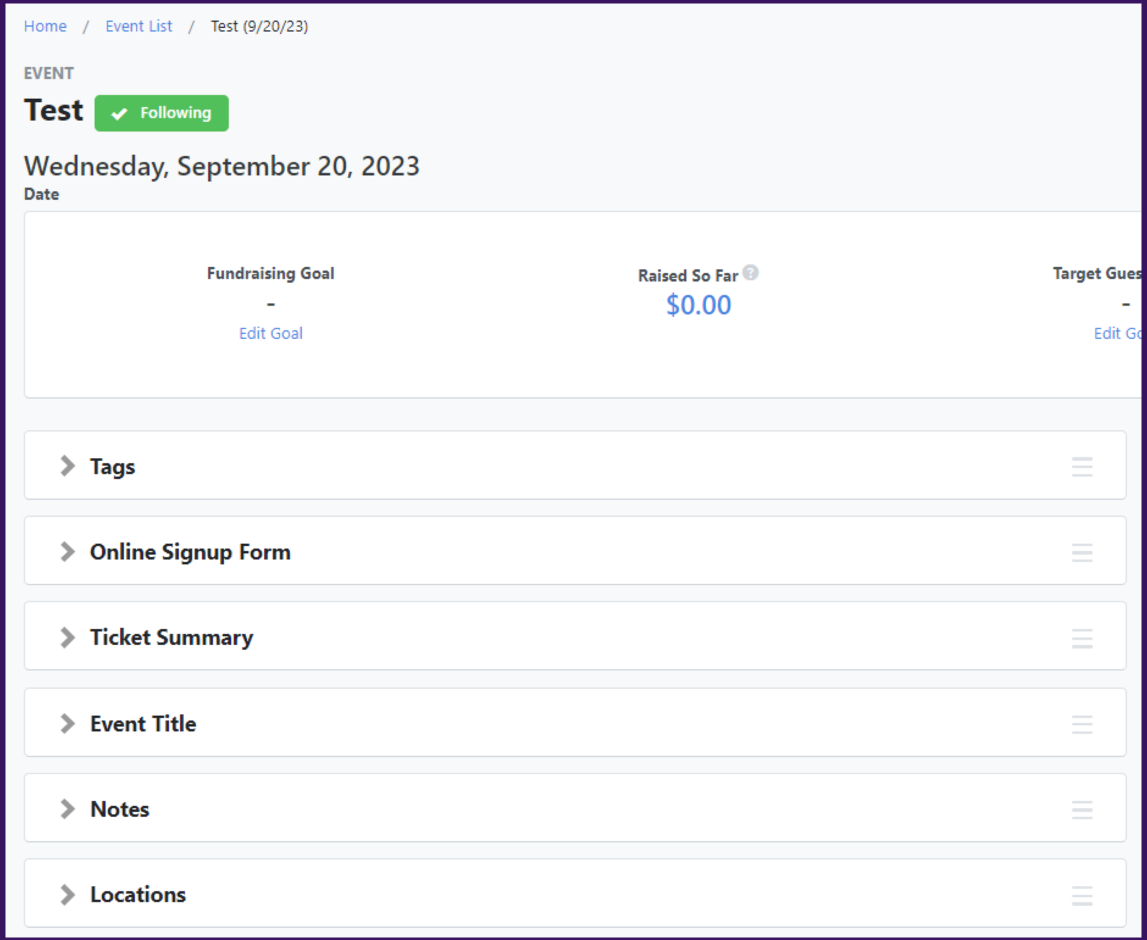


Adding Information on the Event Details Page

On the **Event Details** page, you can add more information about your event or monitor your progress.

Some of the details you can add, or track include:

- Tags
- Online Signup Forms
- Notes
- Event Leads
- Participant Summary
- Zoom Integration
- And, much more!



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Tracking and Searching on Ticketed Event Forms

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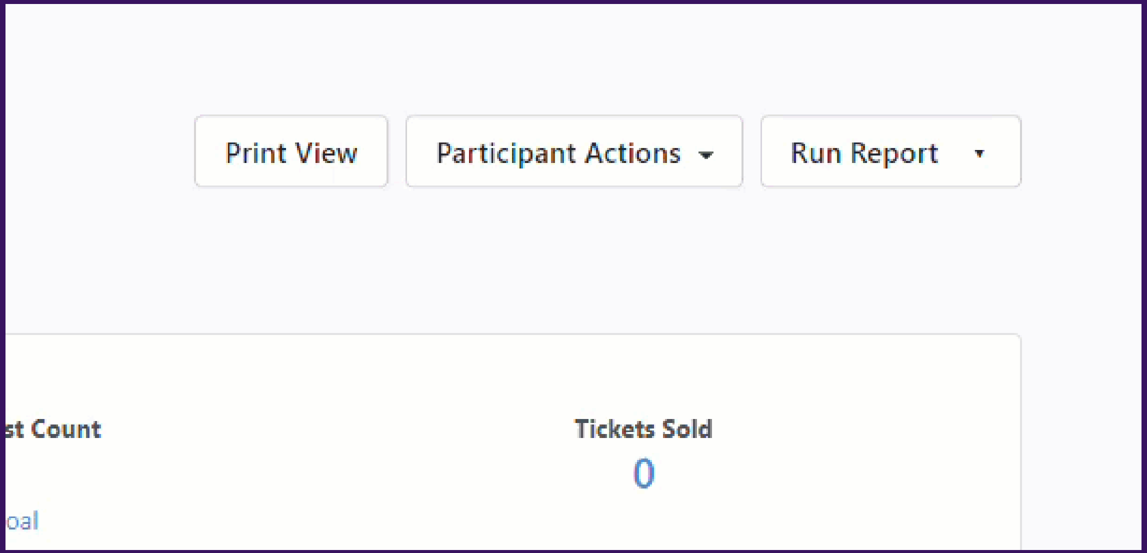
Managing Your Event

You can use the links at the top of the **Event Details** dashboard to create reports or generate participant lists.

The actions you can take include:

- **Print View:** creates a printable PDF that includes a list of the event leads/host committee members, the Participant Summary, and Event Summary
- **Assign Lists:** assign participant or sign-up lists to various staff members
- **Participant Actions:** add participants, view the participant list, and Merge Facebook Participants
- **Run Report:** takes you to the Ticketed Event Contribution Report, lets you view or print the event participant list, or view the Ticketed Guest Report

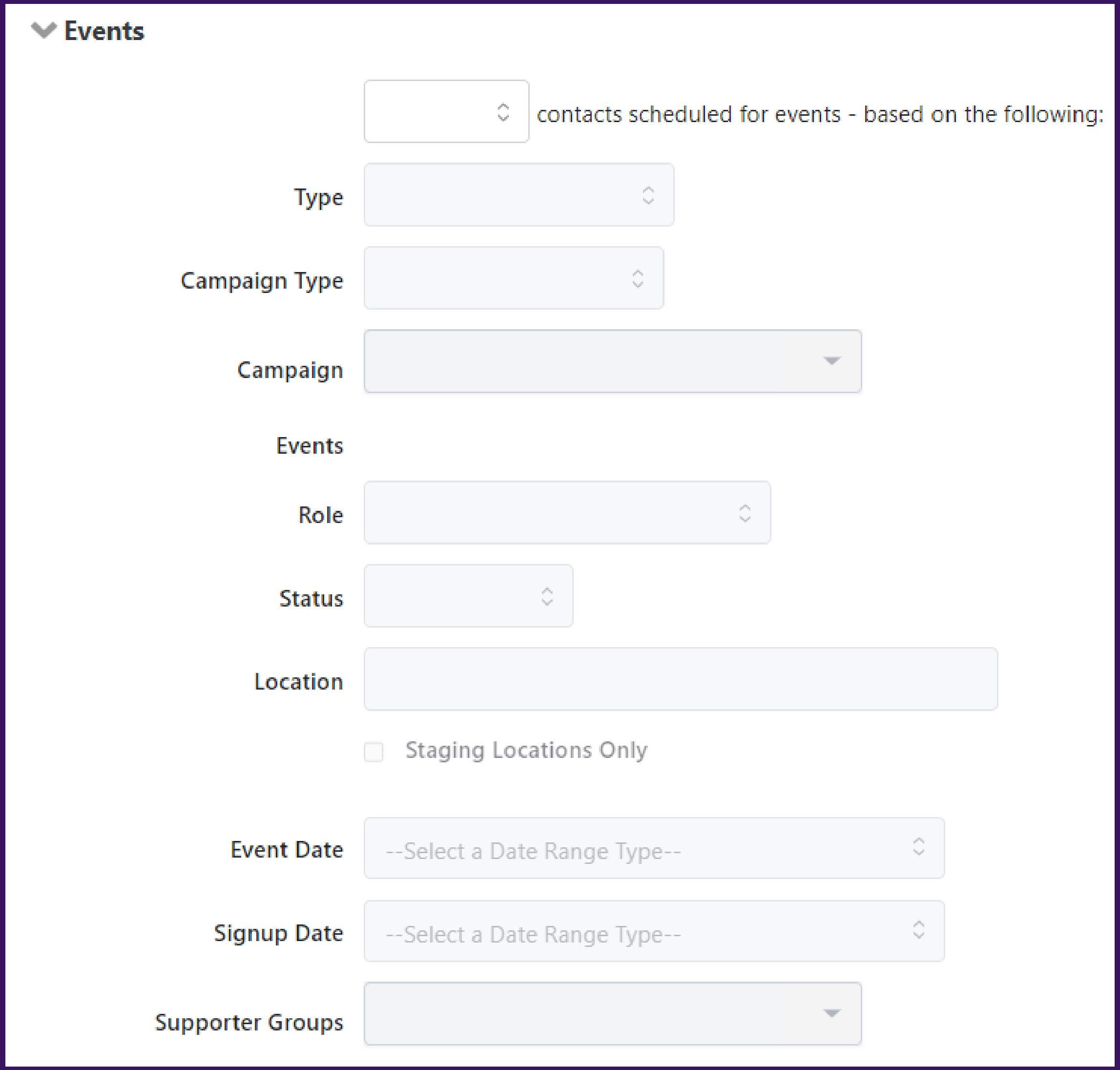


Searching on Event Details

From Create a List, you can search on your ticketed event details, including:

- Event Type
- Event Name
- Role
- Status
- Location
- Event Date
- Signup Date
- Source Codes
- Ticket Level
- Ticket Count

You can also see which events your contacts responded to by looking at the Events section of their contact record.



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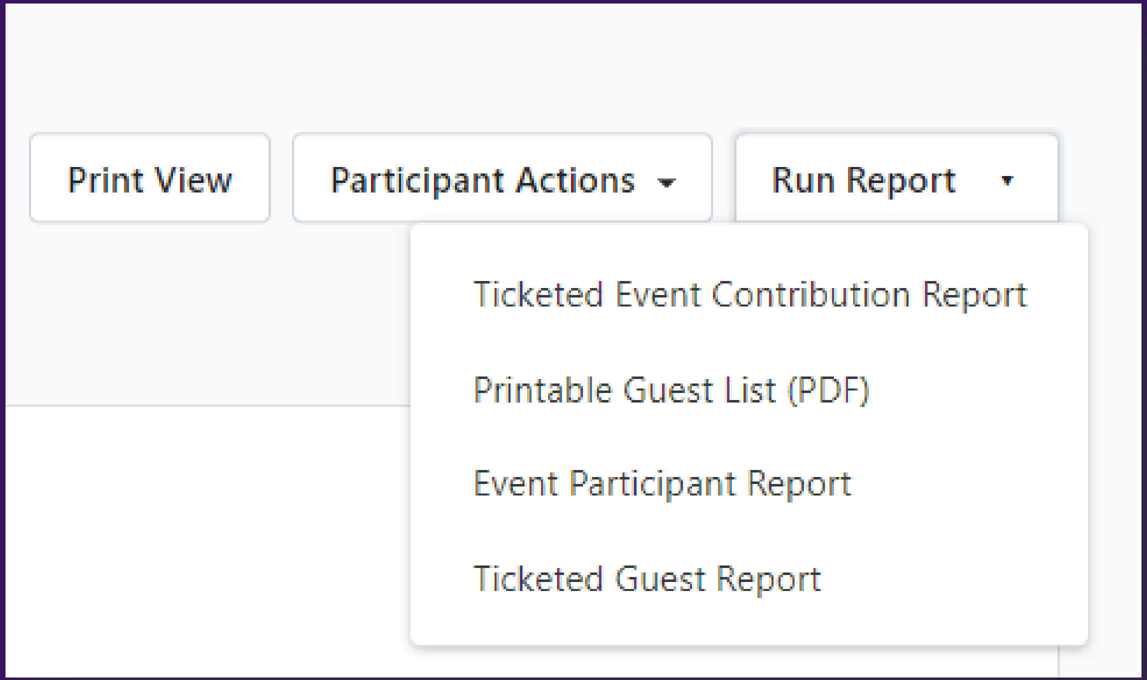
Reporting on your Event

There are several reports you can run, including:

- **Ticketed Event Contribution Report** which helps you track the amount raised by your ticket sales and any additional contributions
- **Printable Guest List t**hat includes all ticket purchasers and guests on a PDF printable list
- **Event Participant Report** gives you information about your contacts who registered for a ticket. Since guest names are not necessarily added as contact records, this report does not include all guests' names entered by registrants.
- **Ticketed Guest Report** shows all tickets purchased and all guest names



Ticketed Event Forms

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Ticketed Event Forms

EveryAction's event management further supports your Ticketed Events with Ticketed Event Forms. These forms carry many supportive functions and streamline your event management process!

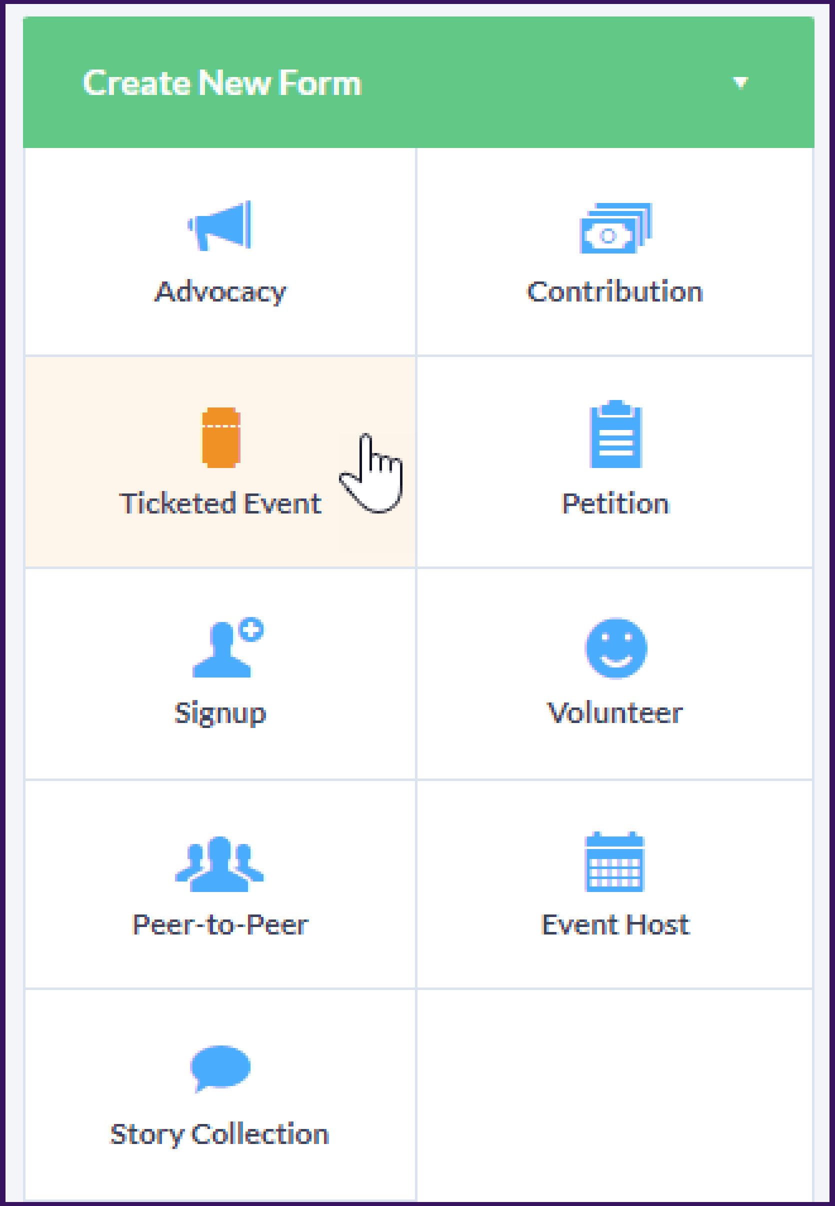
Ticketed Event Forms:

- Allowed up to 10 Ticketed Events forms per each single event
- Event Signup Forms for both paid and non-paid events
- Associate forms to contact records
- Event Participant Report and Guest List give optics on attendance
- Searchable data provided immediate reporting information

Ticketed Event Forms

Once you've created a **Ticketed Event** in the database, navigate to **Online Actions**, click **Create New Form**, and select the **Event** option.

In the **Event section,** you can then select the desired Event Name from the dropdown. This will automatically populate the Designation associated with the event, if any. If the event is monetary, and the **Designation** is configured with more than one Gateway, select the **Gateways** that should be available to the supporter.



Building your Page

On the **Build Page** step, the content editor at the top contains default text with merge fields about the event.

In the **Tickets** section, you can select which ticket levels and labels should display on the form.

In the **Additional Event** Information section, you can configure if the supporter should be prompted to:

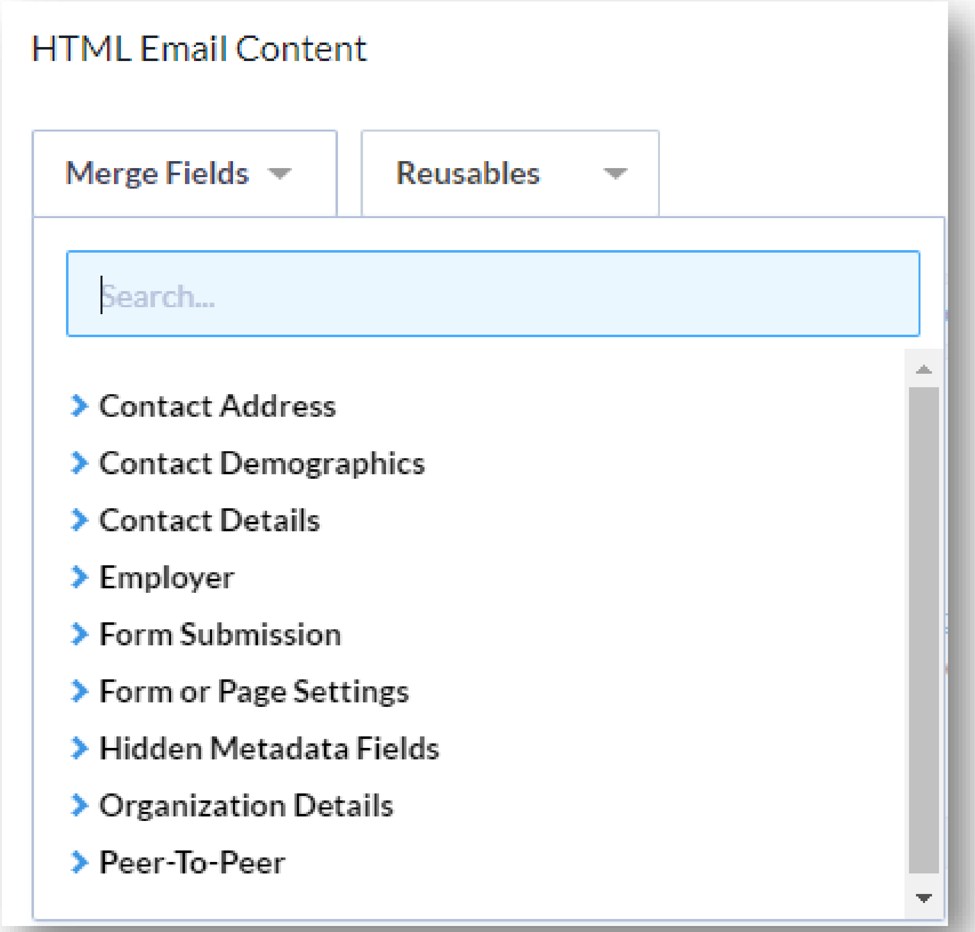
- select a Host Committee member (and if a selection should be required); and
- provide a Guest Name for each ticket (and if a name is required); and
- make an Additional Contribution.

Customize your Confirmations

The **Confirmation Page** step is largely similar to other forms, but you will see additional Event-related merge fields available.

The **{{EventTickets}}** merge field will generate an HTML table that consists of the Guest Names (if provided), Ticket Levels, Quantities, and Prices. This merge field is available for both the Thank You page and the Confirmation Email.

You can also use the **{{AddToCalendarLinks}}** merge field to generate Add to Calendar links that will allow your attendees to automatically add the event to their Apple, Google, Outlook, Outlook.com, or Yahoo calendar.



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Tracking your Event

From the **Build Page** step, you can set up how you plan to track your event.

Adding **Source Codes, Activist Codes,** and associating the form with a particular campaign can help you **track results** across many reports.

Once you've set up your tracking criteria, it will be easier to get more details out of your reports.

From the event details page, you can run several reports from the **Participant Actions** menu. These include the:

- Ticketed Event Contribution Report
- Printable Guest List
- Event Participant Report
- Ticketed Guest Report

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Q&A

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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

Help Center Resources

- How to: Create and Manage Ticketed Events
- How to: Create Ticketed Event Forms

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Additional Training

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

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Feedback & Training Survey

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

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Thank You for Attending!

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