



cloud solutions for nonprofit organizations

Event Management with

CIVICRM



1. Event Types, Participant Roles and Status
2. Managing Existing Events
3. Creating a new Event
 - Event Information Page
 - Event Fees and Price Sets
 - Online Event Registration Page
4. Recurring Events
5. Manual Event Registration by staff
6. Promoting events
7. Manage Participants before and after the event
8. Event Reports – Income report

Event Types



- Can define different types of events
 - Conference
 - Meeting
 - Fundraiser
- Administer > CiviEvent > Event Types
- Can create custom fields to store and display particular data about an event based on Event Type.

Roles and Status



Participant Roles:

- Attendee
- Host
- Speaker
- Volunteer

Participant Status:

- Registered
- Pending from incomplete transaction
- Pending from Pay Later
- On Waitlist (must activate)
- Attended
- No Show

Exercises

Managing Existing Events

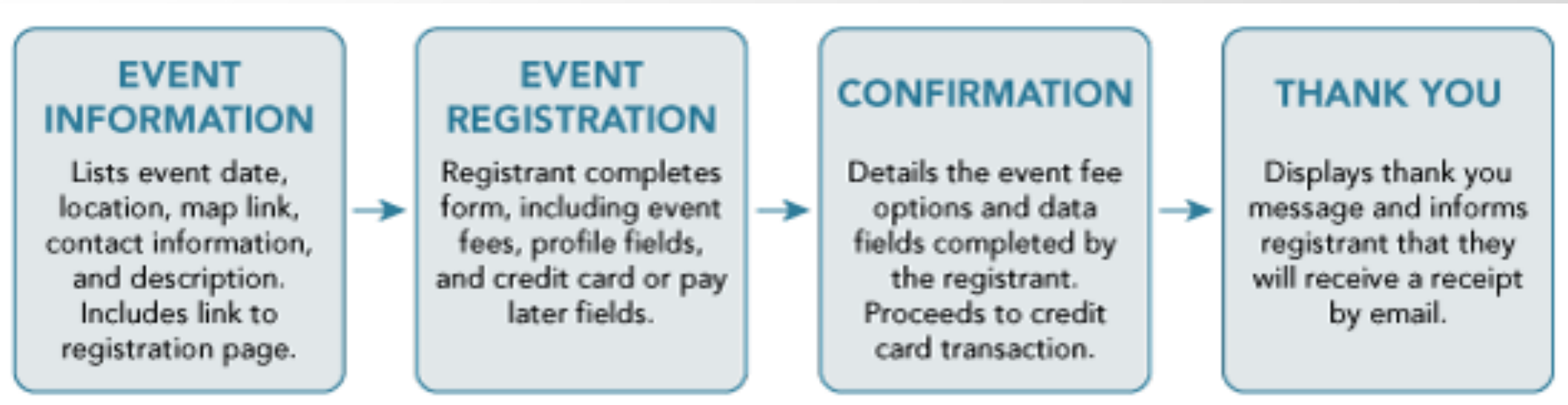
Manage Events:

- Lists current and upcoming events
- Search for past events and event types
- Access configuration, information and registration page links, participant registration

Dashboard:

- Summary of current events and recent registrations

Creating a new Event



Event Information Page



- Assign Event Type
- Assign Participant Role
- Participant List
- Start/End Date
- Maximum number of Participants
- Waitlist option
- Add Location

Event fees

- Regular fees
 - Single list of options
 - Can implement date-based discounts
- Price sets
 - Created first and then added into fees section
 - Allows for multiple sets of fees & options and an accurate count of participants
 - Can set max participant per fee
 - Fees may be presented in various formats

Exercises

Online Registration Page

- Registration Start and End Dates
- Register multiple participants
- Multiple registrations from the same email address – Caution!
- Introductory and footer text
- Adding profiles
- Confirmation Email

Recurring Events



- Create templates for recurring events
 - Can fill in most event settings
 - Select a template when creating an event to prepopulate the event page.
- Make a Copy of an existing event and update info

Exercises

Manual Registration



Options for registering a single participant:

- Register event participant (Events menu)
- Events tab in the contact record (can run cc from here depending on your payment processor)
- Manage Events Links: register participant

Options for registering multiple participants:

- Add contacts to event (from search)
- Import participants

Exercises

Promoting Events



- Add an event info/registration page link to your website
- Include a registration page link in an email
- Add a list of upcoming events on your website
- Show events in a calendar
 - static list of events into another calendar system
 - dynamic list of events into another calendar system

Exercises

Managing Participants before the event



- Tracking attendees
 - Use the Event Dashboard
 - Searching:
- Create an Attendee list:
 - Export attendees
 - Event Participant report template
- Send an email reminder to attend
 - Create Schedule reminders emails

Create Event Name Badges

- Administer>CiviEvent>Event Name Badge Layouts
- User interface to create layouts
- Upload logo/image
- Add any fields including custom fields
- QR or Bar Code (link to URL participant record)

Exercises

Managing Participants after the event



- Update status of registrants
 - Attended, No Show, Cancelled, etc.
 - Batch update participants via profile
- Send a thank you note
 - Use schedule Reminders emails

Exercises

Event Reports



- Event Income Report (Summary) Template
 - Filter on particular time period
 - Shows income and attendance at each event
- Event Income Report (Detail) Template
 - Shows more details (role, status, payment method) for a particular event or events
- Save as a dashlet to view on your home dashboard

Exercises