

Making the most of your Events

CiviCon Denver 2015

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Events are a key aspect to many organizations. Whether a conference, fundraiser or training, managing the event registration, reporting and accounting is key. CiviEvent is a powerful tool to handle your organization's event management.

Planning your event to optimize CiviCRM features will make the entire Event a success from registration to reconciliation.

Create an event plan to work with CiviCRM as opposed to changing CiviCRM to fit your event plan.

Events Should Be...

- Organized
- Profitable
- FUN

Events Should Not Be...

- Frustrating
- Not Profitable
- Caotic

Plan Your Event

Things to consider...

- Is this a regular event? Should you make a template
- How is the event being promoted?
- Is this a paid event? If so...
 - how will payments be received
 - what will things cost
- Who will administer this event, permissions?
 - View Reports
 - Enter registrations
 - Edit registrations
 - Record Payments

Plan Your Event

Start at the end, What do you want on Game Day!

Reports: How you want your registration formatted in your reports & other output will dictate how your input screens are presented.

- What information do you require? and is Required?
- What sort of attendance lists (including counts) are required and how should they be laid out
- Custom information (Meals, Special Requests, etc.)
- Name badges

Plan Your Event

Registration: Functional input screens assure you information is collected easily in both the frontend & backend.

- Sensible layout - easy to use
- Avoid user errors - clear instructions.
- Personal Information (Profiles)
- Pricing information (Price Set)
- Discounts (Early Bird/Codes/Membership/Custom)
- Confirmation Messages
- Reminders

Profiles & Custom Fields

Use of profiles & custom fields to collect key data on attendees.

- Arrange fields in a logical order.
- Make sure required fields are logical.
- Gather all necessary information but not too much
- Clear Instructions & layout
- If using multiple registrations make sure additional registrant profile fits your needs.

Pricing & Price Sets

Simple Pricing

- Radio buttons used for single price option. Options can be setup under Fees Tab

Complex Pricing - Price Sets

- Use for multiple price fields
- Any selections that need to be counted

Discounts

Time Based (Early Bird) Discounts

- Date based discounts can be setup in Fees tab for simple pricing.
- Specific price fields can be set up a price set to expire on a certain date. New field needs to be setup for regular pricing

CiviDiscount

- Discounts codes for either percentage or dollar amount.
- Discounts can be applied to particular line items.
- Discounts can be applied to specific events.
- Automatic discounts to members when logged in.

Reports

- Organize reports in navigation menu - Easy access
- Write the reports you need regularly and add to menu
- Extended Report extension
 - Allows for line item reporting - grouping and counts by price set line items.
- Exports (PDF, CSV)

Testing

Test, Test, Test! and when done test again!

- Run test registrations, make sure you test all aspects of the registration.
- Review all screens and email messages.
- Use multiple email accounts
- Check duplication rule and how it affects input
- Review your reports to assure they are what you want.

Going Live!

- Get the word out!
 - Email to appropriate groups
 - Social Media
 - Talk it up !
- Direct all traffic to your website and make event easy to find
- Make sure you monitor registration for errors or issues
- Review your reports to assure they are what you want.

Post Event

- RELAX! It's over, take a day.
- Have a post event meeting.
 - What Worked
 - What needs to change
- Wrap up data entry
 - Attendance
 - Collections
 - Walk in entries
- Create a time frame for changes, Don't wait until next time

Challenging Example

NYS Correctional & Behavior Health Workshop Understanding the Present & Preparing for the future

- Scholarships for each County
 - Some include Hotel stay
 - Limits on each county (all different)
- Wait list for additional scholarships
- Paid registrations (no knowledge of available scholarships)
- Consolidated reports
- Registration counts for each workshop, meal choices.
- Custom Fields for special needs

Customizing

Customizing Templates:

- Use custom template directory
 - mirror path in custom directory

<!-- .tpl file invoked: CRM/Event/Page/EventInfo.tpl. -->

<!-- .tpl file invoked: CRM/Event/Form/Registration/Register.tpl. -->

- Use .extra for minor changes
- For CSS changes create a custom css file.

Questions?

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