

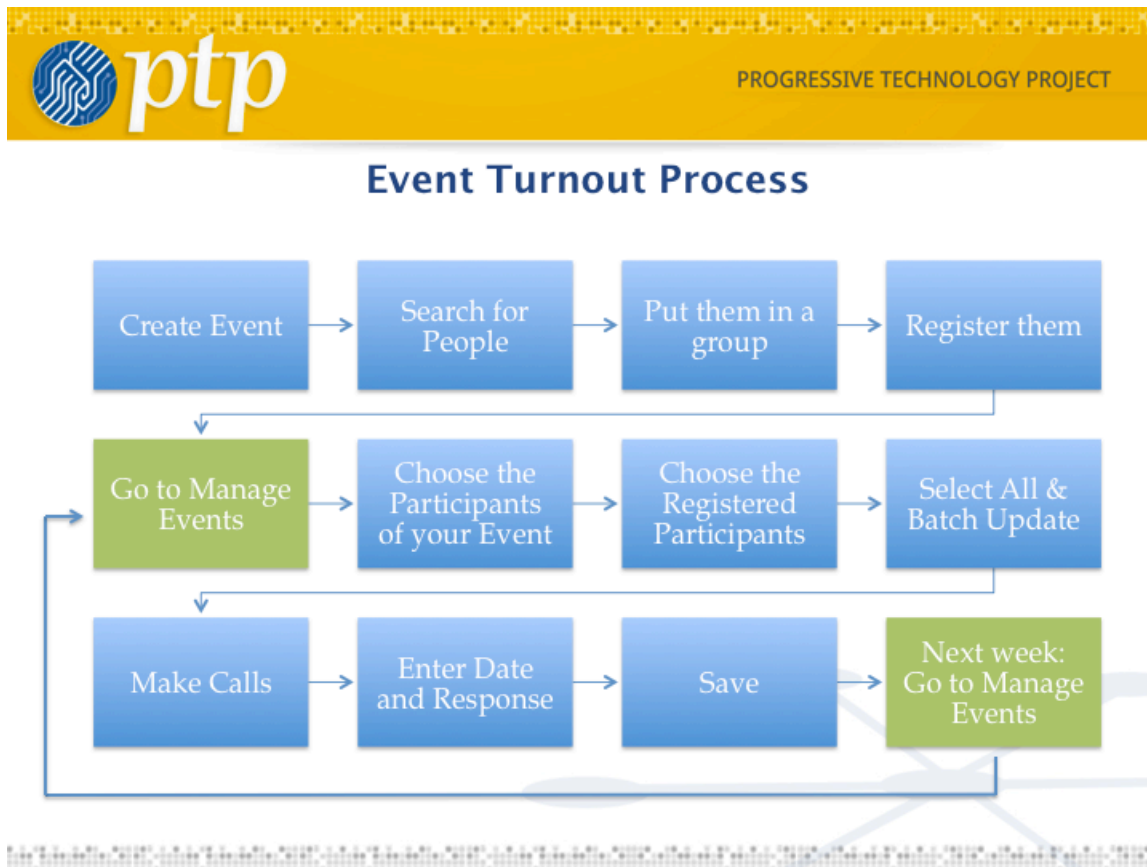
Event Turnout Process

Objective

To learn how to turn out people for an event using the event turn-out process

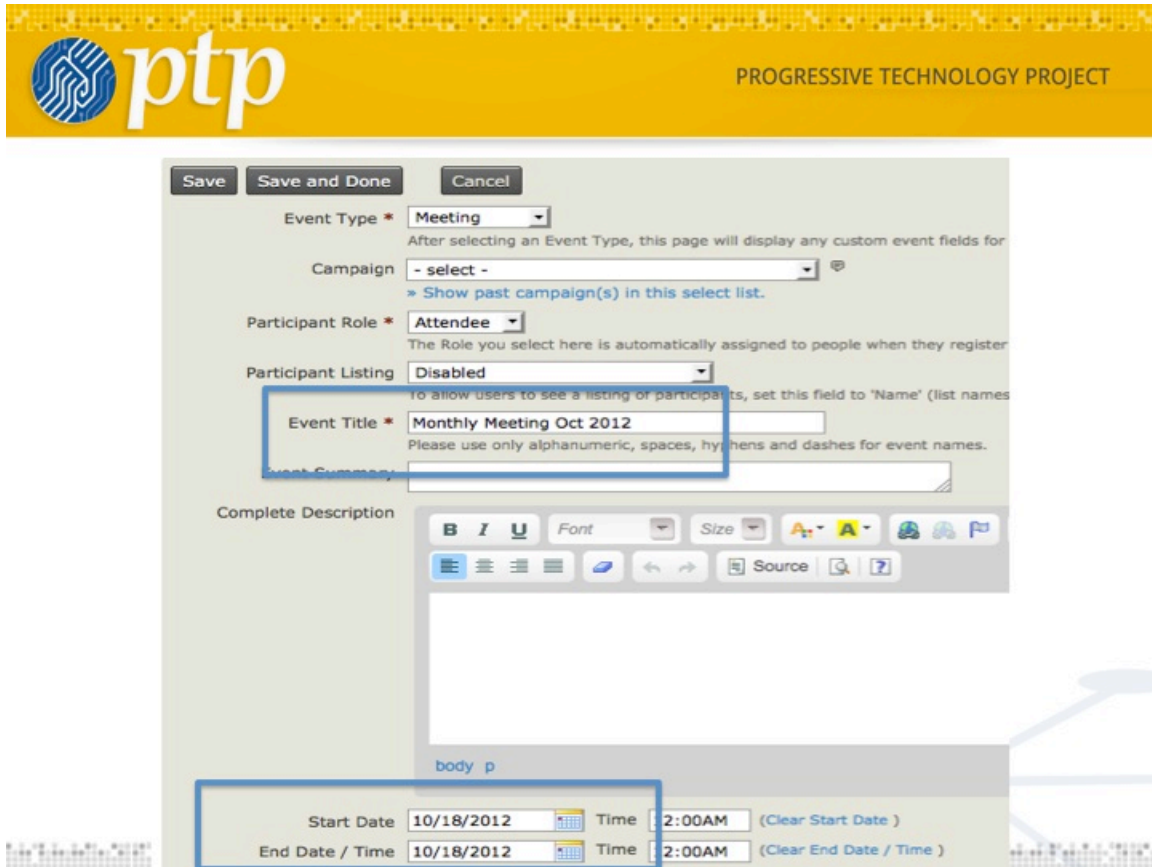
Organizers invest a lot of effort in turning people out to events. PowerBase helps track that effort, by creating a screen that shows the people you need to call, their phone number and space to track their response.

Event Turnout Process Workflow



Step-by-step instructions

1. Create event
 - Give it a name
 - Add the date to the name
 - Always add an end date



- 2. Identify people you want to turnout
 - Put them in a group
 - Register them to event



Advanced Search

▸ Edit Search Criteria

287 Contacts

Contacts IN ORG Attended at least 2 events AND Group Status - "Added"

Select Records:

All 287 records

Selected records only

Print

Add Contacts to Event

Go

Next > Last >> Contact 1 - 50 of 287

A B C D E F G H I J K L M N O P Q R S T U V

Reset all selections

<input type="checkbox"/>	▲ Name	Address	↕ City	↕ State	↕ Postal	↕ Cour
<input type="checkbox"/>	 Aaron, Lillie	584 Granada Ave Apt...	Youngstown	Ohio	44505	United States

Event Turnout Process

3. Go to Events -> Manage Events
 - Choose the Participants link for your event
 - Choose Registered

Event	City	State/Province	Public?	Starts	Ends	Campaign	Active?
Monthly Meeting Nov 2012 (ID: 39)			No	Nov 15, 2012 12:00 AM	Nov 15, 2012 12:00 AM		Yes
Monthly Meeting Oct 2012 (ID: 38)			No	Oct 18, 2012 12:00 AM	Oct 18, 2012 12:00 AM		Yes
Precinct Walk October 2012 (ID: 26)	Youngstown	Ohio	No	Oct 05, 2012 4:41 PM	Oct 05, 2012 12:00 AM	Voter Education 2012	Yes
November 2011 Membership Meeting (ID: 9)			No	Nov 21, 2011 5:22 PM			Yes

4. Batch update participants
 - Update Event Invite responses
 - Make calls
 - Set date for everyone
 - Add response

Find Participants

▸ Edit Search Criteria

287 Results Event = Monthly Meeting Oct 2012 ...AND...
Participant Status IN Registered or Attended or Pending from pay later

Select Records: All 287 records Selected records only

Print Batch Update Participants Via Profile ▾ Go

- actions -

Batch Update Participants Via Profile

Cancel Registration

Change Participant Status

Delete Participants

Export Participants

New Smart Group

Print Event Name Badges

Send Email to Contacts

Next >

<input checked="" type="checkbox"/>			Fee Level	Amount	Registered	Event Date(s)
<input checked="" type="checkbox"/>	Ba	2012	(no fee)		October 1st, 2012	October 18th, 2012
<input checked="" type="checkbox"/>	Price, Laureen	Monthly Meeting Oct 2012	(no fee)		October 1st, 2012	October 18th, 2012
<input checked="" type="checkbox"/>	Jones, Gloria	Monthly Meeting Oct 2012	(no fee)		October 1st, 2012	October 18th, 2012

Batch Update for Event Participants

Batch Update Event via Profile

Select Profile * Update Event Invite Responses ▾

Number of selected participants: 25

Continue >>
Cancel









Batch Update for Events - Update Event Invite Responses

Batch Update for Events - Update Event Invite Responses

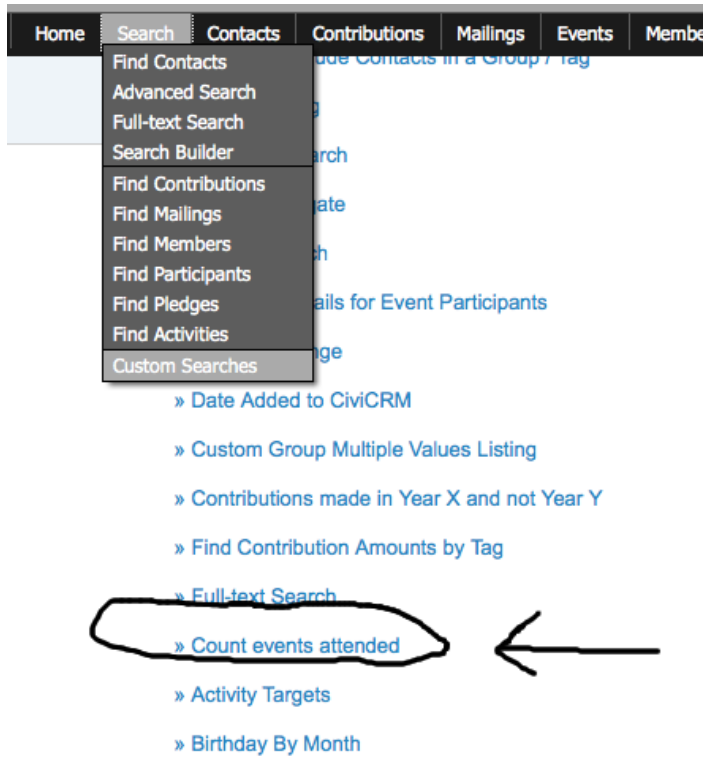
Update field values for each participant as needed. To set a field to the same value for ALL rows, enter that value for the first participation and then click the Copy icon (next to the column title).

Click Update Participant(s) below to save all your changes.

Name	Phone	Event	 First Call	 Invitation Response	 Second Call Date	 Second Call Response	 Reminder Date	 Reminder Response
Bair, Lela	330-555-1234	Monthly Meeting Oct 2012	<input type="text" value=""/> (Clear)	- select -	<input type="text" value=""/> (Clear)	- select -	<input type="text" value=""/> (Clear)	- select -
Price, Lauren	330-555-1235	Monthly Meeting Oct 2012	<input type="text" value=""/> (Clear)	- select -	<input type="text" value=""/> (Clear)	- select -	<input type="text" value=""/> (Clear)	- select -
Jones, Gloria	330-555-1237	Monthly Meeting Oct 2012	<input type="text" value=""/> (Clear)	- select -	<input type="text" value=""/> (Clear)	- select -	<input type="text" value=""/> (Clear)	- select -
Smith, Januelin	330-555-1241	Monthly Meeting Oct 2012	<input type="text" value=""/> (Clear)	- select -	<input type="text" value=""/> (Clear)	- select -	<input type="text" value=""/> (Clear)	- select -

The icon in the header copies the entry in the first row all the way down the column.

- 5. Use data to characterize your people
 - a. Event count search looks for frequent attenders



Home » CiviCRM » Find Contacts » Custom Searches

Find People Who Have Attended Events Multiple Times

A screenshot of the 'Edit Search Criteria' form in CiviCRM. The form has a 'Search' button at the top left. Below it, there are several input fields and a list of event types. The fields are: 'At least how many events attended' (a text input field), 'Event Date From' (a date picker with a calendar icon and a '(Clear Event Date From)' link), and '...through' (a date picker with a calendar icon and a '(Clear ...through)' link). Below these fields is a list of event types with checkboxes: 'Canvass', 'Conference', 'Direct Action', and 'Exhibition'. There is a 'Search' button at the bottom left of the form.

- b. Advanced search Reminder Y + Attended
 - i. People you can count on coming

Event Dates
This Year

Participant Status

- Attended
- Cancelled
- Expired
- No-show
- Pending from incomplete transaction
- Pending from pay later

Participant Role

- Attendee
- Volunteer
- Host
- Speaker

Find Test Participants? Find Pay Later Participants?

Fee Level

Fee Amount From To

Campaigns
- select -

Participant Info

Childcare Needed From To

Ride TO From To

Ride BACK From To

Invitation Date - From (Clear Invitation Date - From) To (Clear To)

Invitation Response - select -

Second Call Response - select -

Reminder Date - From (Clear Reminder Date - From) To (Clear To)

Reminder Response Yes

- c. How to identify people not coming
 - i. Search for no-shows or still Registered after event

This Year ▼

Participant Status

- Attended
- Cancelled
- Expired
- No-show
- Pending from incomplete transaction
- Pending from pay later

Participant Role

- Attendee
- Volunteer
- Host
- Speaker

Find Test Participants? Find Pay Later Participants?

Fee Level ↻

Fee Amount From To

Campaigns ▼

- select - ▼

Participant Info

Childcare Needed From To

Ride TO From To

Ride BACK From To

Invitation Date - From (Clear Invitation Date - From) To (Clear To)

Invitation Response ▼ - select -

Second Call Response ▼ - select -

Reminder Date - From (Clear Reminder Date - From) To (Clear To)

Reminder Response ▼ Yes

Reminder checklist

- Create your event and put date in name
- Search for your group
- Put them in a group
- Register them to the event
- To call them: Manage Events
- Choose Participants (Registered ones) for your event
- Select All and Batch Update via Profile
- Select update Event Invite Responses
- Click Update Participants