Events   PREVIOUS   NEXT

Creating an Event

It's a good idea to go through each screen in detail as you learn about available options. Later in this chapter we'll explain how you can streamline the event creation process by creating event templates. These allow you to pre-fill most options.

Begin by navigating to **Events > New Event**.

Event Information and Settings

The first page in the event wizard requests basic information about the event:

- What type of event is it (e.g. conference, workshop, etc.)?

- What role will participants be assigned when they register online for this event? Roles distinguish different types of event participants, such as attendees, speakers and staff. The value placed in this field will be assigned by default when users register online. The most common value is Attendee.

- Do you want users to see a list of participants, and how much information about the participants do you want to reveal? Participant listings demonstrate support for an event and can help to generate interest within your constituent community. Note that the options you define in this section only *enable* participant listings — to display it, you will need to create a menu item or link to the listing somewhere on your web site. Once you've created the event, the participant listings link is displayed on the event configuration page. Refer to the chapter on Everyday Tasks for information on participant listings and other ways to promote your events.

- What is your event called? The title will appear on event information pages, registration pages, event listings, and in the Manage Events administrative page. Be sure to choose a meaningful, well-crafted title to represent your event.

- The next two fields (event summary and complete description) let you describe your event. Both the summary and complete description will be included on event information pages. Use the rich-text editor provided for the description field to include photo, images, and formatted text.

- Enter the start date/time and end date/time for your event. These will be included on the event information page and event listings.

- Set a maximum number of participants for each event and define a message to be displayed when that number is reached. This is important, because online registration otherwise lets people sign up without giving your staff a chance to intervene and shut off registrations.

- If you'd like to enable the Waitlist feature, you must first enable the related participant statuses. You can then check "Offer Waitlist" and set the message you want displayed on the event information page when the event is full.

- GPS and web-based mapping tools: CiviCRM integrates this functionality by letting you include Google Maps or Open Street Maps throughout your site. You will first need to configure your mapping solution through **Administer > System Settings > Mapping and Geocoding**. Then enable a map link which will generate the location based on the event location.

- Select the "Public Event" box to include the event in promotional listings such as RSS feeds, iCal files or feeds, and event listing pages. (Other techniques for promoting events are described in the Everyday Tasks chapter of this section).

- Lastly, you have the option of making this event active or inactive. If you anticipate that it will take some time to complete the configuration of your event, consider making it inactive it until it is complete to ensure it is not inadvertently listed on the event listing feeds. You can easily activate the event when you are ready to begin publicizing it.

Max Number of Participants	50
Offer a Waitlist?	☑
Waitlist Message	This event is currently full. However you can register now and get added to a waiting list. You will be notified if spaces become available.

☑ Include Map to Event Location?
☑ Public Event?
Include this event in iCalendar feeds?
☑ Is this Event Active?

After reviewing the details on this page, click **Save** to advance to the next step. When you press Save, your event is created. You can interrupt configuration on any subsequent page by clicking Cancel and return later to review and modify any of the settings. Any information you entered on any page will be preserved so long as you press Save on that page.

To return to a saved event, navigate to **Events > Manage Events** and click **Configure** to continue working on the event.

Event Location

The next step is to complete the location and contact details for the event. Though optional, it is highly recommended that you take the time to provide these details to your potential participants. If you have enabled a map link in the previous step, make sure that you fully complete the address details on this page (see screenshot).

Once you have entered an event location, you can reuse it for subsequent events by clicking **Use existing location** and selecting from the dropdown list.

Configure Event - Fall Fundraiser Dinner

Info and Settings   Event Location   Fees (disabled)   Online Registration (disabled)   Tell a Friend (disabled)

Use this form to configure the location and optional contact information for the event. This information will be displayed on the Event Information page. It will also be included in online registration pages and confirmation emails if these features are enabled.

Save   Save and Done   Cancel

Choose Location   ○ Create new location   ● Use existing location
Use Location   14S El Camino Way E :: Collinsville :: Connect ▼

Address

Street Address
14S El Camino Way E
Street number, street name, apartment/unit/suite - OR P.O. box

You can also list phone numbers and email addresses on the event information page if you want to give registrants a way to contact event organizers directly. If the event is being held off-site

from your organization's primary location, you may also want to provide contact information for the meeting location.

Click **Save** to save your entries and advance to the next step.

Event Fees

If the event is free, set the **Paid Event** radio button to **No**, then click **Save** and skip to Online Registration.

If this is a paid event, click **Yes**. The screen will show the options available (see the following set of screenshots).

Questions you are asked on this screen are:

- What Financial Type will be assigned to paid registrations for this event? Although the most common value for this field is simply Event Fee, CiviCRM provides the flexibility to define multiple Financial Types and assign them to different events as needed. See *Set-Up* in the *Contributions* section for details.

- Do you want to allow registrants to pay later by mailing in a check, paying on-site with cash or credit card, or arranging some other payment method? If so, you can enable the Pay Later option and define a label and payment instructions. If you keep this unchecked, registrants will be required to pay by credit card.

Configure Event - Fall Fundraiser Dinner

Info and Settings | Event Location | Fees (disabled) | Online Registration (disabled) | Tell a Friend (disabled)

[Save] [Save and Done]   [Cancel]

Paid Event   ● Yes ○ No

Payment Processor   [My Payment Processor ▾]

If this is a paid event and you want users to be able to register and pay online, select a payment processor to use. NOTE: Alternatively, you can enable the **Pay Later** feature below without setting up a payment processor. All users will then be asked to submit payment offline (e.g. mail in a check, call in a credit card, etc.). (learn more...)

Contribution Type *   [Event Fee   ▾]

This contribution type will be assigned to payments made by participants when they register online.

Fee Label *   [Event Fee]

This label is displayed with the list of event fees.

          ☑ Enable Pay Later option?

Check this box if you want to give users the option to submit payment offline (e.g. mail in a check, call in a credit card, etc.).

Pay Later Label *   [I will send payment by check]

Text displayed next to the checkbox for the 'pay later' option on the contribution form.

Pay Later Instructions *   [Send a check made out to "Central City Food Bank" and mail it to 12 Main St., San Jose CA 92011 within 3 business days.]

- Can you use **Regular Fees** for this event, or do you need to use a **Price Set**? Regular fees are easy to set up: each fee amount has a label assigned and you can set a default fee. Here's a simple example:

Regular Fees

Use the table below to enter descriptive labels and amounts for up to ten event fee levels. These will be presented as a list of radio button options. Both the label and dollar amount will be displayed. You can also configure one or more sets of discounted fees by checking "Discounts by Signup Date" below.

Fee Label	Amount	Default?
Members	295.00	●
Non-members (regular)	395.00	○
Non-members (student)	195.00	○

- **Price sets** - examples and steps for creating price sets are covered later in this section.

- You can also configure early bird discounts (discounts determined by sign-up date). These override regular event fees. This discounting method is available only for the regular fee structure. Implementing other discounting rules or discounts for price sets requires additional programming. You or your developer should refer to the section on extending CiviCRM for more information.

Discount Set	Start Date	End Date
Early Registration Discount	May 06 2009	May 31 2009

⊞ another discount set

(Add Discount Set to Fee Table)

Discounted Fees

Use the table below to enter descriptive labels and amounts for up to ten discounted event fees for each discount set. **Don't forget to click 'Save' when you are finished.**

Fee Label	Early Registration Discount	Default?
Early Registration Discount before June 1, 2009	$ 100	○
Standard Fee	$ 165	●
Performer Rate	$ 150	○

- Discounts are structured in parallel with the base event fees. After creating your list of fee options and enabling the discounts feature, you must create the discount set and add it to the fee table. To help you create a discount set, a new fee table will appear toward the bottom of your page, duplicating the original fee table shown in the previous screenshot. You can now edit the labels and fees to correspond to the discounts offered for each of the original fee options.

- You can create multiple date-based discount sets for an event. This may be useful if you have a series of early bird dates that progressively increase the cost of registration as the date of the event gets closer.

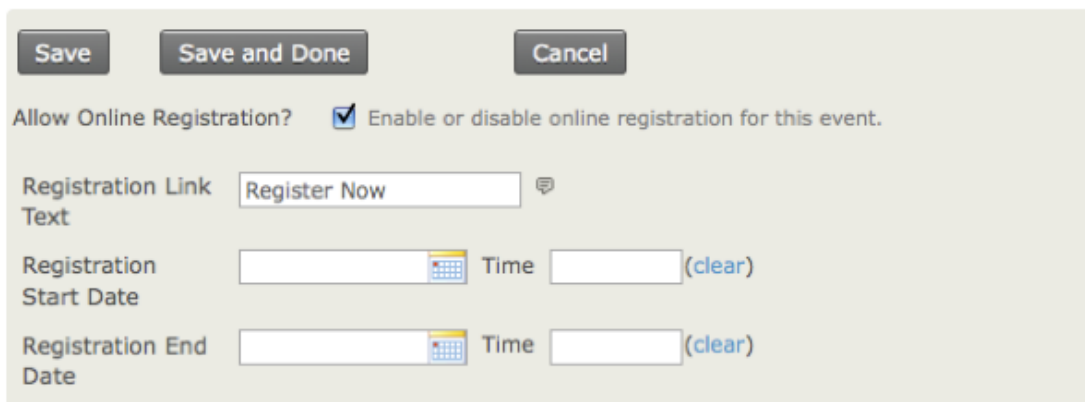Click **Save** and advance to the next step.

Online Registration

Your organisation may want its staff to register participants manually. However, allowing people to register online (self-service) through your web site offers many benefits. Online registration is

convenient for your constituents and can save staff time and resources.

To offer online registration, check **Allow Online Registration** and use the options on this form to configure this feature.

- Define the text to be used as the link to the registration form, and set the starting and ending dates for registration. The link text is used in the event information page, and is most commonly "Register Now" or similar. The start and end dates define when web site visitors may register for the event. The registration end date may be different from the start date of the event, as you may want to close registration in advance of the event in order to prepare name tags or perform other administrative functions.

- Enabling "Register multiple participants" lets individuals register as many people as they choose for the event and pay the fees with a single transaction. For example, an organisation may be sending multiple people to a conference, or an individual may bring their partner and wish to register and pay for both in a single process. By default, this option requires a different name and email address for each person registered.

- Checking "Allow multiple registrations from the same email address" provides the same capabilities, but without requiring distinct email addresses for each registrant. In either case, CiviCRM uses a separate contact record (either an existing one if it's already in the system, or create a new one) for each individual registered.

- The Registration Screen configuration defines introductory and footer text for your registration page, and the profiles included in the top and bottom regions of the form. If you come to this stage in the wizard and have not created your profile form, you may continue with the event set-up process and return to the event configuration page later to select your desired profiles.

- What other data do you want to capture from your participants as they register? By default, the CiviEvent registration page requires only an email address. Organizations typically want to collect additional contact information from the registrant, as well as define fields unique to this particular event (such as meal choice). The custom data fields and profiles used here (see screenshot) must be created before you reach this form, as described earlier in

this chapter. Here, you can include as many profile form snippets as needed in your registration page. It's a good idea to put contact data (name, address, etc.) in one profile snippet, and event related information (e.g. meal choice, childcare requirements, etc.) in a second profile.

- You can collect different information from additional participants by selecting different profiles, or the same by selecting "same as for main contact".

The remaining fields on this page allow you to define the text displayed on the Confirmation page, Thank-you page, and emailed confirmations/receipts (if enabled). The standard page flow is shown in the following screenshot:
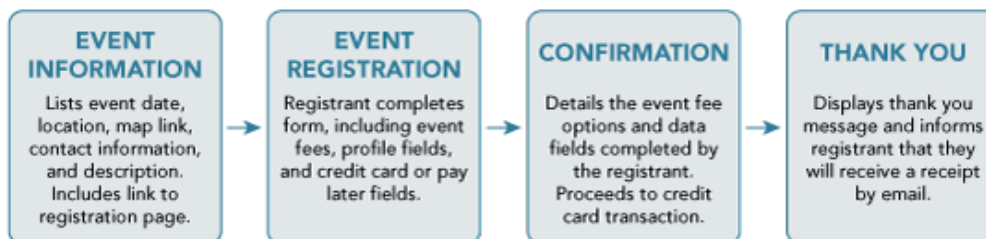
For free events, the Confirmation step is skipped. When completing the Confirmation, Thank-you, and Confirmation Email sections on this page, take care to think about the user experience at each stage in the process. Ensure that the text is appropriate to the point where the registrant will be in the registration process.

For most events you'll want to enable the Send Confirmation Email feature (see following screenshot). For paid events, the confirmation email also acts as a receipt. Make sure that the Confirm From Email address entered is a valid email account on your mail server. Add one or more staff emails (separating multiple email addresses with commas) to the CC Confirmation To field if you want real-time updates on who is registering for your event.

▾ Confirmation Email

Send Confirmation   ⊙ Yes ○ No
Email? Do you want a registration confirmation email sent automatically to the user? This email includes event date(s), location and contact information. For paid events, this email is also a receipt for their payment.

Text   Contact the Development Department if you need to make any changes to your registration.

Additional message or instructions to include in confirmation email.

Confirm From   Fundraising Dept.
Name *   FROM name for email.

Confirm From   development@example.o
Email *   FROM email address (this must be a valid email account with your SMTP email service provider).

CC Confirmation
To   You can notify event organizers of each online registration by specifying one or more email addresses to receive a carbon copy (cc). Multiple email addresses should be separated by a comma (e.g. jane@example.org, paula@example.org).

Click **Save** to save your entries and continue with the next step.

Tell-A-Friend

CiviEvent makes it easy to leverage the social networking power of your committed constituents by empowering them to quickly and easily share details about your organization and event with their friends and colleagues. The final step in the event creation is a page where you can enable "Tell-A-Friend" capabilities. You can define the text and links to be included on that page and in the email sent from the tool (see the following screenshot).

A "Tell a friend" activity record will be added to a participant's Activities tab each time she sends mail to her friends. This allows you to track your most active supporters and engage them further. The people who are emailed using this feature are also automatically added to CiviCRM as contacts.

Personal Campaign Pages

If you enable Personal Campaign Pages (PCPs), you offer completed event registrants the ability to create and customize a page of their own to either:

- promote the event for which they registered

- promote an online contribution page

For more information see **Contributions > Personal Campaign Pages** in this book. This is the last step in creating an event. Click **Save and Done.**

Including profiles in an event registration page

The best way to collect additional information (such as food or lodging preferences) during online registration is to include profiles in your event configuration.

Do this as follows:

1. Navigate to **Events > Manage Events**.

2. Click **Configure** for the appropriate event.

3. Click the **Online Registration** tab or link.

4. Select from the dropdown menus one profile for "top of page" and another profile for "bottom of page".

5. You can add even more profiles if needed by click this link on the form: "Click here for new profile".

Include Profile   [Your Registration Info ‡]
(top of page) Include additional fields on this registration form by configuring and selecting a CiviCRM Profile to be included at the top of the
               edit profile

Include Profile   [- select -   ‡]   add profile
(bottom of page) Include additional fields on this registration form by configuring and selecting a CiviCRM Profile to be included at the bottom of

               Click here for new profile

By default, when creating an online registration form the profile "Your Registration Info" will be selected automatically. This consists of only one field: the visitor's email address. Alternatively, you could deselect this profile and add the email address to another profile placed anywhere in the form. However please note that email addresses are not required, and an online registration can be created by using a profile which only takes the name of the participant (although if you do this, be sure to uncheck the option "Send confirmation email?" at the bottom!).

If the profiles you require do not already exist, you will need to create them. See "The User Interface" for information on how to do this.

Complex event fees with price sets

Price sets play a role similar to custom data fields and profiles, but support options for event fees instead of basic data collection. Here's an example of how a price set looks to a person who is registering for a Conference that includes optional pre-conference training sessions, meals and lodging:

Conference Fee
Registration Fees [General Admission - $ 125.00 ▾]
                   *

Pre-Conference ☑ Using Social Networking Tools for Organizing - $ 25.00
   Trainings   ☑ Getting the Most out of your Blog - $ 25.00

Meals (per meal [1   ]
cost) - $ 10.00   Enter the number of meals you would like to purchase. Cost is $10 per meal.

Lodging (per [1   ]
night) - $ 100.00 Enter number of nights you will need lodging. Cost is $100 per night.

Total Fee(s) $ 285.00

We saw earlier that event creation involves setting up event fees. The standard fees layout form is a very simple structure, allowing you to create a list of fees and their labels. The resulting layout allows the registrant to select one option from the list. Often, this single-option format does not meet the complex demands of your event registration structure. Price sets allow you to create multiple registration fee fields and assign the entire set to an event.

To create and manage price sets:

- navigate to **Manage Price Sets** and choosing the **Events** link OR
- navigating to **CiviEvent > Manage Price Sets** and choose **Administer**.

Similar to custom data sets, you begin by creating a new price set and then adding specific fields.

Creating a New Price Set

To create a new price set:

1. Click **Add Set of Price Fields**.
2. In the Price Set form, enter the name of your price set, and check "Used For" > "Event". It's helpful to also add a description since Price Sets can be used by more than one event.
3. Press **Save**.
4. A form appears for you to create the first field in your price set.

Creating a New Price Field

Begin by entering a name for the event item in the Field Label**.**

Workshop Fees with meals and lodging - Price Fields

Save   Save and New   Cancel

Field Label * Pre-conference Training

Input Field Type * CheckBox

Select the html type used to offer options for this field

Participant Count

Enter a value here if you want to increment the number of registered participants per unit against the maximum number of participants allowed for this event. For example, if this price field is for a table at a fundraiser which seats eight people, you would set Participant Count to 8.

Multiple Choice Options

Enter up to ten (10) multiple choice options in this table (click 'another choice' for each additional choice). If you need more than ten options, you can create an unlimited number of additional choices using the Edit Multiple Choice Options link after saving this new field. The option 'label' is displayed on the form, while the option 'value' is stored in the contact record. The label and value may be the same or different. Inactive options are hidden when the field is presented.

Default	Label	Amount	Weight	Active?
☐	Collaboration Skills	250.00	1	☑
☐	Intro to Group Facilitation	250.00	2	☑
☐	Advanced Group Facilitation		3	☑

The Input Field Type has a structure similar to custom data fields, with some unique qualities and usage relevant to fee structures.

- **Text/Numeric Quantity:** allows you to set a unit price. When the form is presented to the registrant to fill it, it displays a text box where the registrant enters a quantity. The quantity entered is multiplied by the unit value to calculate the fee.
- **Select:** displays a dropdown box where the registrant selects one option from the list.
- **Radio:** displays multiple options in a list, allowing the registrant to select one fee choice.
- **Checkbox:** displays fields in a list where the registrant can select or unselect any number of options.

You can combine these field types to create virtually any fee structure.

Enter a number in the Participant Count field if you want to increment the number of registered participants per unit against the maximum number of participants allowed for this event. For example, if this price field is for a table at a fundraiser which seats eight people, you would set Participant Count to 8.

For Text/Numeric Quantity fields, enter an amount in the Price field. For Select, Radio and Checkbox types you will enter a price for each option in the table of options (shown in the screenshot above).

If you want to display the price next to the event item, check the Display Amount? box.

As when creating other custom data, you can enter a description for the Field Help, decide whether the event item is required, select whether the event item is visible to the public or only to the administrator in the Visibility field, and indicate whether the event item is Active. These fields are described in the chapter on extending core data.

Next, you can either press **Save** to finish configuring this event item, or **Save and New** to create another price field for this price set.

Once you finish configuring your price set, you can add it to your event in step 3 where you configure the event fees. Select the name of your price set in the Price Set field as shown in the following screenshot.

As with custom data fields, it is to your advantage to give thought to the structure of your registration fees and build the price set before creating the event. However, if you begin the event creation process and determine that you needed to construct a price set, you can complete the process, create the price set, and then return to the event configuration page to assign the price set.

Price sets can be reused in multiple events. This is particularly helpful for organizations that run multiple events in a series, such as a regional training seminar program.

Testing your event

Before revealing your event to the public, you should always test the event registration process. This can be done as follows:

1. Navigate to **Events > Manage Events**.

2. From Event Links, select **Test-drive** to test the registration page. Test-drive mode will use the sandbox options for your payment processor, if available, and will create a registrant record with a test indication so that it can be reviewed and easily removed.

3. Fill out the registration form and complete the registration process.

4. In order to find the new test participant record, navigate to **Events > Find Participants**.

5. In the search criteria, check the box **Find Test Participants**.

6. If you need to adjust the event settings, navigate to **Events > Manage Events** and click the **Configure** link for this event.

7. If you discover elements that you need to edit and adjust, select **Configure** to return to the list of event setting pages.

8. If you have events where anonymous users register for events, you should also test the registration when not logged in. Refer to the Event Permissions information later in this chapter for details.

Once you are satisfied with the event information and registration form, it's time to display it on your website. The Everyday Tasks chapter includes detailed information on adding the event to your web site and promoting it.

Using event templates to streamline event creation

If you need to set up a number of events with similar configurations, you can streamline the process using event templates.

The steps for creating event templates are similar to those described earlier for creating an event. The main differences are:

- Assign a descriptive template title that clearly identifies the type of event this template is used for (e.g., Monthly community meetup with online registration).
- There are no starting and ending dates in the template form. That information will always be specific to an actual event instance.

Click **Events** > **Event Templates**.

- To create a template, start by navigating to **Events** > **Event Templates** and clicking **Add Event Template**. Enter template title and event type.
- Select campaign if all events created from this template should be associated with a campaign.
- Continue the normal event set-up process using the settings that will be constant for all events to be created using this template.
- Common characteristics might include location, event fees, online registration settings, tell-a-friend settings, etc.

New Event Template

Continue >>   Cancel

From Template	- select -
Template Title *	Monthly community meetup with online registrati
Event Type *	Meeting

After selecting an Event Type, this page will display any custom event fields for that type.

Campaign	- select -
Participant Role *	Attendee

The Role you select here is automatically assigned to people when they register online for this event (usually the default 'Attendee' role).

Participant Listing	Disabled

To allow users to see a listing of participants, set this field to 'Name' (list names only), 'Name and Email', or 'Name, Status and Register Date'.

Event Title	Insert Month Community Meetup

Please use only alphanumeric, spaces, hyphens and dashes for event names.

Event Summary

Complete Description

B I U   Font   Size   A A   Source

body p

Max Number of Participants

☑ Include Map to Event Location?
☑ Public Event?
Include this event in iCalendar feeds?
☑ Is this Event Active?

Continue >>   Cancel

Once you've created an event template, you can select that template (as shown in the following screenshot) when you start to create a new event. Your event will be pre-filled with the saved configuration properties.

New Event

Continue >>   Cancel

From Template	Monthly community meetup with online registration
Event Type *	Meeting

After selecting an Event Type, this page will display any custom event fields for that type.

Campaign	- select -
Participant Role *	Attendee

The Role you select here is automatically assigned to people when they register online for this event (usually the default 'Attendee' role).

Participant Listing	Disabled

To allow users to see a listing of participants, set this field to 'Name' (list names only), 'Name and Email', or 'Name, Status and Register Date'.

Event Title *	April Community Meetup

Please use only alphanumeric, spaces, hyphens and dashes for event names.

Event Summary

Setting permissions for event registration

This section applies to Drupal and Joomla installations.

If you've enabled online registration for events on your site you need to review the Drupal user permissions to ensure that visitors are able to view event information and complete the registration forms. Navigate to **Administer > Users > Permissions**.

Most organizations allow anonymous users (users who have not logged in) to view and register for events. If you want to allow this, you must assign the following CiviCRM module permissions for the anonymous user role:

- access all custom data - required if you are collecting information in custom fields from registrants
- profile create - required if you've included any profiles in your online registration forms
- register for events
- view event info
- view event participants - required if you want to display a listing of registered participants.

If you want to exclude anonymous visitors from viewing or registering online for events, assign these permissions to an authenticated user role.

CiviCRM has an additional permissioning system known as Access Control Lists (ACLs) ACLs allow you control access to CiviCRM data. Note that a CiviCRM ACL Role is not related to the Drupal Role. Refer to the Access Control List chapter for more information.

If you need to limit access control for specific events, you can use the Manage Access Control feature to assign access to specific groups of contacts.

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