healthwatch

Creating and managing events

Using the Healthwatch CiviCRM

About this resource

As well as managing your contacts, the CRM provides an easy way for you to manage events.

This includes everything from creating an online registration form, keeping track of participants and sending email reminders to those who are or have attended your events.

This resource explains how to create an event and manage participants, using the Civi CRM.

Creating an event

- First, go to the 'Events' tab, and click on 'New Event'. You will then see a screen where you can fill in some of the event details.

- Choose the event type. You can choose any of the existing event types, or create a new one simply by clicking on the spanner next to the field.

- Select the Default Role ID: this is the role that you wish participants to be automatically added as.
  Usually this is set as attendee, as it is likely that anyone registering online or who you will add after a phone call will be an attendee.
  There are other options, such as volunteer, and you can add your own by clicking on the spanner next to the field.

- The participant listing is set as disabled so that it is not used; this can be changed to name only or name and address so that you can create publicly accessible lists.However, to do this certain configurations would need to be changed.

- Add your 'Event Title' – this is a mandatory field.

- Event Summary and Complete Description are optional and it is up to you whether you complete them or not.

- Add the start and end date and time of the training.

- If there is a maximum number of participants you need to specify. If so, you can write your own message to appear to those who try to register after the event is full.

- Are you going to promote the event on your website? If so,tick the public event box:

- By ticking Map to Event, you will have a map of the area show on the public page, and to publish the event you need to tick the active box.

- Click on Continue at the bottom of the page, and you will be taken to the page where you can configure your event.

- The first page asks for information such as the address of the training: you can either create a new venue or use one already in the system.

- After you have saved all the settings you need to, click on Save and then move on to Online Registration (unless you have an event you are charging for: this can be set up under the Fees tab).

Online registration

- If you wish to allow online registration for your event, tick the box and the following form will appear for you to create your webpage.

- Depending on the event that you are hosting, you may wish to allow multiple participants to register or require each attendee to register themselves.

- The duplicate matching rule works on the same basis as in other areas of CiviCRM by choosing Name and Email the system will look to see if your participant already has a contact record. If they do, then the event will be added to their record, if they don't, a new record will be created.

- Further down, you can add introductory text (including pictures), text/pictures at the bottom of the page, and profiles.

- Profiles are the fields you use to ask your participants for details before they register: if you already have profiles created, they will drop down in the field.

- If you would like to create a new one, click on create.

- You can choose which fields you have, and then drag and drop from the list on the right onto the space on the left.

- Next, you can choose whether to have a confirmation screen for your participants, a thank you email, and if you would like to send a confirmation email.

- In all the text fields, you can also insert pictures and change fonts as you wish.

- Next, you can click 'Save and Done'. If you then return to the Info and Settings tab, you will find that an online address has appeared.

- This is the url that you need to add to your website to have participants sign up.

- You can then test your online page by going to the 'Manage Events' pages, and selecting your event

- Click on Event Links, and you will have the option of testing the site.

- Go to Registration (Test-drive) and your site will appear.
  Please bear in mind that if you test-drive it from your own CRM account your name will appear in the fields automatically.

  If you would like to view it as a member of the public would see it, it is best to copy the url onto a different browser.
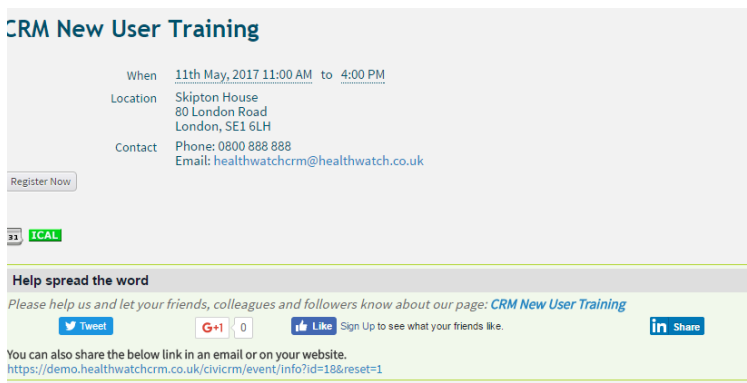

Promoting your event

- You can see the links you have enabled through ticking to share on social media.

- There is also a 'Tell a Friend' tab on the events configuration page. However, you need to leave this disabled as the CRM captures the information of anyone the event is forwarded to through this function, and you do not have permission to store their data.

Scheduled reminders

- You can use schedule reminders to send automated emails at a certain time before or after the event. For example, you could send:

  - o a reminder to all volunteers seven days before the event,

  - o a reminder to all participants 24 hours before the event,

  - o a thank you to the volunteers 24 hours after the event.

- You can have more than one scheduled reminders for each event. For each scheduled reminder, click on 'Add Reminder'
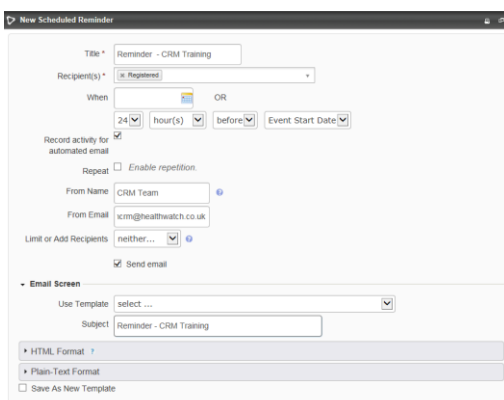
- Add a title, decide who the recipients should be, and when to send it.

- You can send the reminders more than once by ticking Repeat.

- To send an email you can either use a template that has already been set up, or create one using HTML or Plain Text.

Registering participants

- There is more than one way to register a participant for an event, but the easiest way is to use the link on the Events menu at the top of the screen.
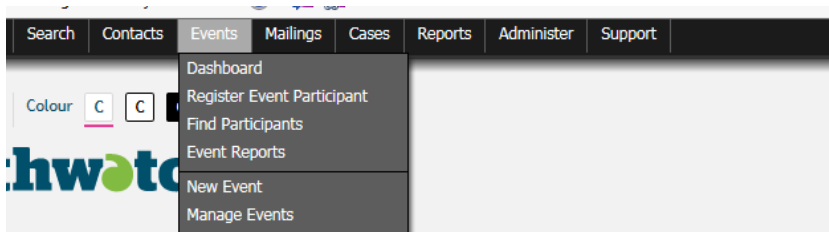
- On clicking 'Register Event Participant' you will see a new screen which allows you to register participants.

- Fill this in, adding your contact, and choose the event from the drop-down list that comes up, putting whether the participant is an attendee, a volunteer or has another role, and there is also a status – as with the participant role, this is a drop-down list that you can change or create new statuses by clicking on the spanner.

- If you wish to send a registration confirmation, click on the Send Confirmation box, and a new area will appear for you to send an email to your participant.

- If you click on Save and New, you can then add another participant in the same manner. By just clicking Save you will be taken to your participant's contact record. Under Events you will see that the registration is saved.

  You can see that both the status and the role are displayed: after the event has been held you may wish to change the status to show whether the participant attended, cancelled or was a no-show – it will help you with keeping accurate records.

- The registration will also be shown under the activities tab

Type	Subject	Added By	With	Assigned	Date	Status	
Event Registration	CRM New User Training - 11th May, 2017 11:00 AM - Attendee - Registered	Demo, Demo	Smith, Jane	n/a	12th May, 2017 2:33 PM	Completed	View File on Case

Show 25 entries. First Previous 1 Next Last

This is a brief overview of the event registration: as you can see, it can be viewed or filed on a case but not edited or deleted. If you edit or delete it on the event tab, it will automatically change the activity.

Try it for yourself

1. Create a new event for a conference
2. Register a participant
3. Cancel the registration of the participant. What is the status now?