

EVENTS MANAGEMENT: An Introduction for ROI Users

Prepared by:
Gina VanderLoop, President & CEO
ROI Solutions

The Revolution Online Events Management System allows your organization the ability to track and manage events directly in your main database of record. Everything from events, venues, activities, participation, attendance, payments, and outputs such as name badges and tent cards are provided directly in this system. And with the events management system managed directly in your ROI Revolution Online database, the capabilities for reporting and in-depth analysis are limitless.

Why Events?

Events are another way to reach out to your constituents to raise funds, awareness and create community within your support base. And for years, I have watched nonprofit organizations use multiple systems and “ways” of managing their events – from large scale National events – to small community events – from online ticket sales to seating charts and all the manual processes in between.

Our intent with the Revolution Online Events Management System is to create a placeholder for those events directly within your Revolution Online database. This Events Management system is provided to all ROI clients at no-charge, because we don’t believe in “modules.”

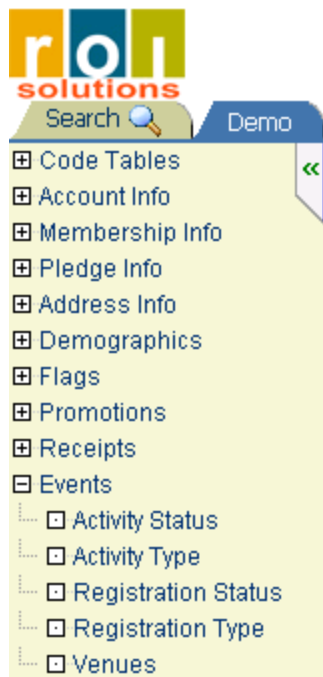
The purpose of this document is to highlight the high level features of the ROI Revolution Online Events Management System – just enough get you interested. *A more detailed training document on its usage can be found in the Revolution Online Users Manual. Please contact your ROI Client Services Representative for a free online training on the new system.*

Part I: Setting up your Events Management System

Setting up Events

The first order of business is to set up your validation tables for the various options you will make available to your organizational staff in using the Events Management System.

In your Client-Specific Reference Tab (the one that bears your organization's name), look for "Events" in the navigation window:



Code tables let you tailor the system to your own needs. An important part of set-up is to come up with values that are meaningful to your organization. In that regard, you should give some thought to what codes will be used and necessary for your organization's Event Management.

Activity Status



Activity Status help define the status of the activity itself. Some common examples might be "cancelled", "completed" "not-completed" or "in-progress."

Activity Type



Activity Types can be limitless and helps you to define the types of activities being offered for any specific event. Some examples might be: "ticket sales", "seminars", "silent auction", "major donor reception", and "raffle" and so on.

Registration Status



Registration Status helps you track the status of registrants. Some common examples here might be "Registered Only", "Registered Paid", "Registered Complimentary".

Registration Type

- Events
 - Activity Status
 - Activity Type
 - Registration Status
 - Registration Type**
 - Venues

Registration Type allows you to track the types of registrants to the event. Common examples might include: "speaker", "special guest", "registrant", or "table captain."

Venues

- Events
 - Activity Status
 - Activity Type
 - Registration Status
 - Registration Type
 - Venues**

Venue is a placeholder to store information specific to the location of the event or activity such as the name of the venue, its location (address) and other specific details such as facilities or services offered at the venue.

Event Venues

Edit event venue The Capitol Theatre

Name	The Capitol Theatre		
(Organization) Address Alt 3			
Address Alt 2			
Address Alt 1			
Street Address	82 Mass Avenue		
City State Zip	Arlington	MA	02474
Country	USA		
Other features	<input type="button" value="add"/>		
	Capacity 200 to 500	✗	
	Elevator	✗	
	Hearing Assist Technology	✗	
<input type="button" value="save"/> <input type="button" value="no changes"/>			

Use the "Add Button" to store additional information about the Venue.

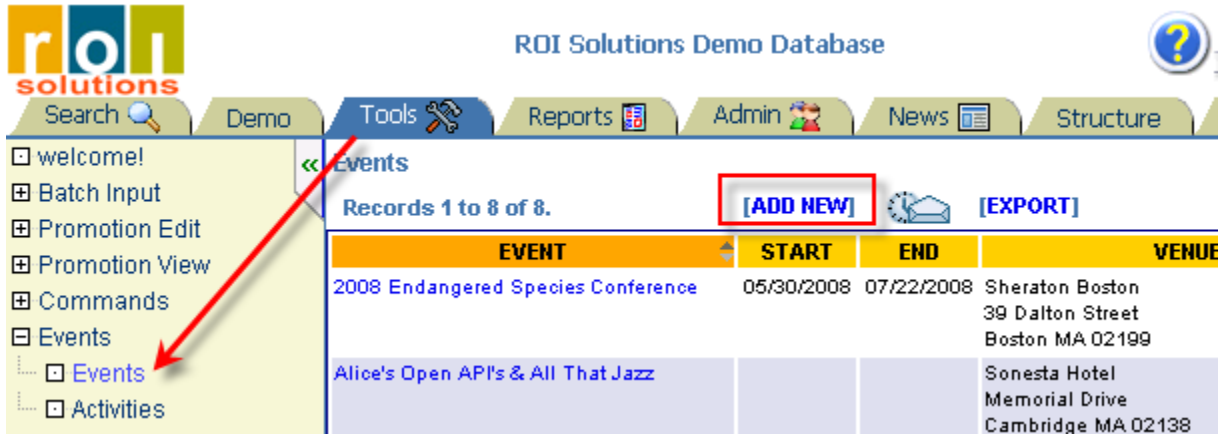
Special Note: The items that appear in the "Other Features" section are also controlled by your organization's systems administrator. These are located in the Flags Section of your "Client-Specific" reference tab as indicated below.

- Flags
 - Account Flags
 - Source Code Flags
 - Demographic Flags
 - Comment Flags
 - Volunteer Flags
 - Board Flags
 - Event**
 - Event Activity**
 - Event Venue**

Part II: Working with Events

Events

To set up a new Event, go to your "Tools" Tab to Events and click on "ADD NEW" as shown below:



ROI Solutions Demo Database

Search Demo Tools Reports Admin News Structure

welcome! Batch Input Promotion Edit Promotion View Commands Events Activities

Records 1 to 8 of 8. [ADD NEW] [EXPORT]

EVENT	START	END	VENUE
2008 Endangered Species Conference	05/30/2008	07/22/2008	Sheraton Boston 39 Dalton Street Boston MA 02199
Alice's Open API's & All That Jazz			Sonesta Hotel Memorial Drive Cambridge MA 02138

Here you can enter in the necessary information pertaining to the Event as well as select the Venue which was created through the "Client-Specific" reference tab earlier.

Edit event

Event Name Monthly Movie Night

Venue The Capitol Theatre

Start Date 06/05/2008

End Date 06/25/2008

Info Code

Notes

Other features
add Enrollment by Invitation Only ✗
Focus: Fundraising ✗

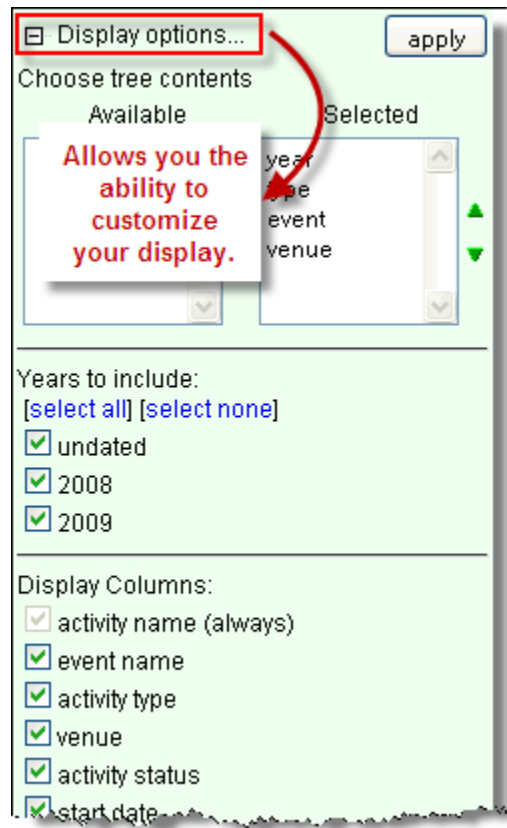
save no changes







Activities

You can think of an "event" as a relatively large-scale "activity holder" that contains one or more "activities." When you click on the "activities" in the navigation menu, you will see "activity tree" as shown below:




The activity tree gives you the ability to filter and view your event activities with extreme flexibility. The "display options" give you control over what you want to see in the tree as well as which columns you want to see in the list that is displayed.




Edit Event Activity Record 189...	
Name	<input type="text" value="The Main Event"/>
Event	Monthly Movie Night – starts 06/05/2008 – ends 06/05/2008 ▼
Type	Ticket Sales ▼
Status	Not Completed ▼
Starts	06/01/2008  ▼
Ends	06/30/2008  00:00 ▼
Venue	The Capitol Theatre ▼
Room	Theatre #2
Early registration	mm/dd/yyyy 
Standard registration	mm/dd/yyyy 
Late registration	mm/dd/yyyy 
Info Code	<input type="text"/>
Facilitator	Ms. Barbara J. Streisand ▼ 
Notes	<div style="border: 1px solid black; padding: 5px;">You can type any notes or comments here</div>
Source	<input checked="" type="checkbox"/> check if this uses a payment source code for registration
Recurring	<input checked="" type="checkbox"/> check if this is a recurring activity
Assigned	<input checked="" type="checkbox"/> check if this activity has assigned seating (no seats currently assigned)
Capacity	<input type="text" value="250"/> max number of attendees (optional)
Credits	<input type="text"/> the number of credits for this activity (optional)
Other	<input type="button" value="add"/> Report this to DPW ✘
<input type="button" value="save"/> <input type="button" value="no changes"/>	

Configuring Seating


The Revolution Online Events Management System allows you to configure seating for the event or activities. In the set up of the Activity, if you have selected the option to use assigned seating as shown below, you will have the option to create a seating set up within your venue.

Source	<input checked="" type="checkbox"/> check if this uses a payment source code for registration
Recurring	<input checked="" type="checkbox"/> check if this is a recurring activity
Assigned	<input checked="" type="checkbox"/> check if this activity has assigned seating (no seats currently assigned) 

To configure seating for an activity, select the seating icon as shown below:













Activity List
Found 1 record. [\[ADD NEW\]](#)  [\[EXPORT\]](#)


ACTIVITY	EVENT	TYPE	VENUE	STATUS	STA
The Main Event	Monthly Movie Night	Ticket Sales	The Capitol Theatre #2	Not Completed	06/01/2008

 configure seating for this activity

Within the Configure Seating section of the management system, you can create and name the seating according to whatever makes most sense for your activity. These can be tables or seats, rows or whatever. And the Events Management System in Revolution Online allows you the ability to clone a section with the name and quantity so that an entire venue can be set up automatically for you.

Event: Monthly Movie Night 06/05/2008 -- 06/28/2008
Activity: The Main Event -- Ticket Sales
Starts: 06/01/2008 12:00 am
Location: Theatre #2 -- The Capitol Theatre
Assigned Seating: Yes
Max capacity: 250

Seating Configuration			
Section Name	Quantity	Assigned	Commands
Table 1	10	0	 
Table 2	10	0	 
Table 3	10	0	 
Table 4	10	0	 
Table 5	10	0	 
Table 6	10	0	 

Allows you the ability to clone a section and create more just like it automatically. 

Once you've begun to configure your seating, you can view the details of the event and its seating as shown below:

Event: Monthly Movie Night 06/05/2008 -- 06/28/2008
Activity: The Main Event -- Ticket Sales
Starts: 06/01/2008 12:00 am
Location: Theatre #2 -- The Capitol Theatre
Assigned Seating: Yes
Max capacity: 250
Configured seats: 160
Assigned seats: 0

Part III: Working with Attendees

Attendees can sign up for your events and activities in a variety of ways. They can register by making a payment to a source code linked to the event's activities, or you can simply register them directly without going through the batch input system. This direct registration can be done one account at a time, by bulk input (pasting from a spreadsheet, for example), or through our Upload Tool.

Once individuals become attendees, they appear in the "Event Attendees" Listing allowing you the ability to manage their status and assign specific seating, if your activity requires such.

Event Attendees — The Main Event

set status to Registered Only Records 1 to 10 of 10. [\[ADD NEW\]](#) [\[EXPORT\]](#) [\[SAVE FLEXLIST\]](#) [\[CUSTOMIZE\]](#)

<input type="checkbox"/>	ROI ID	DONOR	QUANTITY	REGISTRATION STATUS	REGISTRATION TYPE	TRANSACTION STATUS	SEATS
<input type="checkbox"/>	456	Mr. Bernard J. Rubble III	10	Registered Only	Registrant		0
<input type="checkbox"/>	457	Mrs. Betty	5	Registered Only	Registrant		0
<input type="checkbox"/>	461	Ms. Gina	9	Registered Only	Registrant		0
<input type="checkbox"/>	463	Mr. Steve McNulty	1	Registered Only	Registrant		0
<input type="checkbox"/>	468	Mr. Kevin M. Maloney	8	Registered Only	Registrant		0
<input type="checkbox"/>	469	John McCarthy	1	Registered Only	Registrant		0
<input type="checkbox"/>	471	Mr. David Piccirilli	10	Registered Only	Registrant		0
<input type="checkbox"/>	472	Matthew A. Rosen	1	Registered Only	Registrant		0
<input type="checkbox"/>	473	Mr. Jason Semine	11	Registered Only	Registrant		0
<input type="checkbox"/>	552	Dr. Joergen A. VanNiel, M.D.	10	Registered Only	Registrant		0

Records 1 to 10 of 10. [\[ADD NEW\]](#) [\[EXPORT\]](#) [\[SAVE FLEXLIST\]](#) [\[CUSTOMIZE\]](#)

If your activity uses assigned seating, you can click on the "seating" icon to then assign attendees to specific seats within your venue. Note: Revolution Online will manage the remaining seats within your seating setup once they've been assigned so there's no danger in over-assigning seats.

Donor: John McCarthy
 Registration status: Registered Only
 Registration type: Registrant
 Seats needed: 1

Here you can enter in any special information and select the seating assignment.

Seating Assignment			
Attendee Name	Attendee Organization	Seat Assignment	Special Instructions
John McCarthy	ROI Solutions	Table 1 (10 available) ▼	

Additionally, if an attendee has purchased more than one ticket to an event once you indicate the number, we will populate the screens for you for any of their guests with the correct number based upon their purchase amount. This allows you the ability to seat people at the same "table."

Donor: Ms. Gina M VanderLoop
 Registration status: Registered Paid
 Registration type: Registrant
 Seats needed: 9

If your registrant has "purchased" multiple seats, we will configure the entry screen for their guests accordingly so you can assign them to the same table if necessary.

Seating Assignment			
Attendee Name	Attendee Organization	Seat Assignment	Special Instructions
Ms. Gina M VanderLoop	ROI Solutions, Inc.	Table 1 ▼	
Ryan O'Neal		Table 1 ▼	
Barbra Streisand		Table 1 ▼	
Paul Sand		Table 1 ▼	
Whitman Mayo		Table 1 ▼	
Patti D'Arbanville		Table 1 ▼	

And finally, once you've configured seating, the Events Management System allows you to view the seating chart – which tells you who is assigned to which tables or seats in your venue. There you can also produce various outputs such as name badges or tent cards or whatever else you'd like.

roi solutions Configure Seating (Demo)

Event: Monthly Movie Night 06/05/2008 -- 06/28/2008
 Activity: The Main Event -- Ticket Sales
 Starts: 06/01/2008 12:00 am
 Location: Theatre #2 -- The Capitol Theatre
 Assigned Seating: Yes
 Max capacity: 250
 Configured seats: 190
 Assigned seats: 11
 Seats required: 66

print name badges

print tent cards

Functions to print various outputs are provided.

Table 1 (10 seats)		
Ms. Gina M VanderLoop ROI Solutions, Inc.	461 Ms. Gina M VanderLoop	Registered Paid Registrant
Ryan O'Neal	461 Ms. Gina M VanderLoop	Registered Paid Registrant
Barbra Streisand	461 Ms. Gina M VanderLoop	Registered Paid Registrant
Paul Sand	461 Ms. Gina M VanderLoop	Registered Paid

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