

Event2CRM – User Manual

For Microsoft Dynamics 365 & CRM 2016, 2015, 2013

Plan. Promote. Track.

Any event that requires registration or ticketing.



Event2CRM

Microsoft Dynamics CRM Event Management

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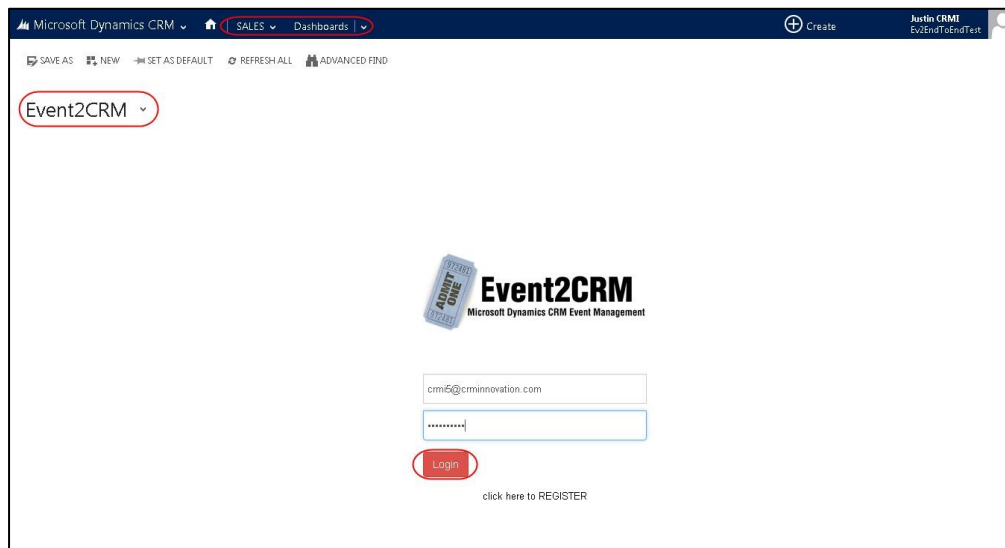
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APPLICATION: LOGIN

Navigate to the Event2CRM Application from within CRM by going to the **Marketing | Dashboard** area and choosing the Event2CRM dashboard, or use the Event2CRM application from the web by going to “<https://EV2.CRMInnovation.com>”.

To log into the Event2CRM application enter your Eventbrite e-mail and your Eventbrite password and click the “Login” button.



*(NOTE: If this is the first time using and logging into the Event2CRM application you will need to click on the “Click here to register” link and follow the instructions in the **Event2CRM 2.0 Installation & Setup Guide.**)*

APPLICATION: SETTINGS & ADMIN

Under the Administration section is where you may change the Event2CRM application settings. In the Administration section you may also update your CRM credentials and Eventbrite password.

SETTINGS

In the Event2CRM application go to the **Admin | Settings** area to change the application settings:

The screenshot shows the Event2CRM Admin interface. On the left is a sidebar with navigation links: Events, Admin, Setting, CRM Credentials, EventBrite Logins, and Logout. The 'Admin' section is selected. The main content area is titled 'Admin' and contains a 'SETTING' section with three numbered items:

- Event Tab:** A section titled 'Event Tab' with a dropdown menu for 'Default Landing Tab' currently set to 'Published To CRM'.
- Event Statuses:** A section titled 'Event Statuses' with a 'Show By Default:' label and four checkboxes: 'Live' (checked), 'Draft' (unchecked), 'Completed' (checked), and 'Canceled' (checked).
- Event Registrants:** A section titled 'Event Registrants' with a 'Look for E-mail match in:' label and two checkboxes: 'Contacts' (checked) and 'Leads' (unchecked). Below this is a 'When no E-mail match, Create:' label with a dropdown menu set to 'None'.

A red 'Submit Change' button is located at the bottom of the settings area.

1. Event Tab:

Default Landing Tab may be set to either “Published to CRM” or “Eventbrite Only” and determines which tab in the Events section is defaulted to after logging in to the application.

2. Event Statuses:

Show By Default allows the user to set which event statuses (Draft, Live, Completed, Cancelled) are shown by default after logging in, on both of the tabs in the Events section. While logged in you can still adjust what event statuses are shown in either Event table by using the Event Status Filter buttons above the tables but the **Show By Default** settings will be utilized when you next login.

3. Event Purchaser/Registrants:

Default E-Mail Matching Settings

Look For E-Mail Match In - allows the user to set which entity type(s) the application searches in your CRM system to find a match to the email address provided by the Eventbrite registrants. If a match is found the CRM record will be associated with the Event Order and Registrant record in CRM.

When No E-Mail Match, Create – allows the user to set which record type (or any at all) is created and associated with the Event Registrant record in CRM if no match to the Eventbrite

registrant's email can be found in the CRM system. *(NOTE: If Lead or Contact is selected to be created when no matching record is found make sure that the corresponding entity in the **Look For E-Mail Match In** setting (above) is set to "Y" (checked) or the application could create multiple matching records.)*

Click on **"Submit"** to save the Settings.

CRM CREDENTIALS

A user may update their CRM credentials (Username and Password) by clicking the **Edit** button and updating the credentials as needed and clicking the **Save** button when done.

The image displays two screenshots of the Event2CRM Admin interface, specifically the CRM CREDENTIALS section. The top screenshot shows the 'EDIT' button circled in red. The bottom screenshot shows the 'SAVE' and 'CANCEL' buttons circled in red.

Top Screenshot: The 'Admin' section is titled 'CRM CREDENTIALS'. Below the title, there is a blue header 'Event Tab'. The form contains two fields: 'CRM USERNAME' with the value 'tester@Ev2EndToEndTest.onmicrosoft.com' and 'CRM PASSWORD' with a masked value '*****'. A blue 'EDIT' button is located at the bottom of the form.

Bottom Screenshot: The 'Admin' section is titled 'CRM CREDENTIALS'. Below the title, there is a blue header 'Event Tab'. The form contains four fields: 'CRM USERNAME' with the value 'tester@Ev2EndToEndTest.onmicrosoft.com', 'CONFIRM USERNAME' with the value 'tester@Ev2EndToEndTest.onmicrosoft.com', 'CRM PASSWORD' with a masked value '*****', and 'CONFIRM PASSWORD' with a masked value '*****'. At the bottom of the form, there are two buttons: a red 'SAVE' button and a green 'CANCEL' button.

(NOTE: It is important to remember that the Event2CRM application needs working CRM credentials to communicate between Eventbrite and your CRM system so it is important to use this section to keep Event2CRM up to date with any changes you've made to your CRM credentials.)

EVENTBRITE CREDENTIALS

A user may update their Eventbrite Password by clicking the "Authorized" button. After redirected to Eventbrite login page, the user will confirm to allow Event2CRM to access the user's account. The user will then enter the Eventbrite password and clicking "Save" when done. EB OAuth Token is updated each time password is changed via this method.

You cannot change your Eventbrite Username here because each Eventbrite account requires a unique Event2CRM license. You may contact CRM Innovation (support@crminnovation.com) if you would like to acquire another Event2CRM license to be used with another Eventbrite account or to change your current Event2CRM license to work with a different Eventbrite account.

The first screenshot shows the 'Admin' section of the Event2CRM interface. Under 'EVENTBRITE CREDENTIALS', there is a form with three fields: 'EVENTBRITE USERNAME' (filled with 'ev2demo@crminnovation.com'), 'EVENTBRITE PASSWORD' (filled with '*****'), and 'EB OAUTH TOKEN' (empty). Below the form is a blue button labeled 'AUTHORIZED'.

The second screenshot shows the Eventbrite authorization page. It asks 'Allow Event2CRM by CRM Innovation LLC to access your Eventbrite account?'. Below the text are two buttons: 'ALLOW' and 'DENY'. At the bottom, it says 'Logged in as ev2demo@crminnovation.com (not you?)'.

The third screenshot shows the 'Admin' section of the Event2CRM interface after authorization. The 'EVENTBRITE CREDENTIALS' form now has four fields: 'EVENTBRITE USERNAME' (filled with 'ev2demo@crminnovation.com'), 'EVENTBRITE PASSWORD' (filled with '*****'), 'CONFIRM PASSWORD' (filled with '*****'), and 'EB OAUTH TOKEN' (filled with 'TUFOYZMEBIP2STG6Z4O5'). Below the form are four buttons: 'AUTHORIZED', 'EDIT', 'SAVE', and 'CANCEL'.

(NOTE: It is important to remember that the Event2CRM application needs working Eventbrite credentials to communicate between Eventbrite and your CRM system so it is important to use this section to keep Event2CRM up to date with any changes you've made to your Eventbrite credentials.)

APPLICATION: EVENTS TAB

PUBLISHED TO CRM

Under the Events Section the **Published To CRM** tab shows all of the Eventbrite Events that have previously been published to CRM using the Event2CRM application. The Event Table contains the following information about each Event:

PUBLISHED TO CRM									
Live Draft Completed Canceled Records Per Page 10									
1.	2.	3.	4.	5.	6.	7.	8.	9.	10.
	EVENT NAME	EVENT DATE	EVENT ORGANIZER	EVENT LOCATION	ATTENDEES	LAST SYNC (UTC)			
	Annual Company Party	12/17/2014 08:00:00 PM	CRM Innovation LLC	The Fanciest Hotel in the Kansas City	3/25	6/18/2014 07:25:33 AM	Republish	Sync Now	Start Sync
	brand new event	7/27/2014 07:00:00 PM	CRM Innovation LLC	Online Event	2/5	6/18/2014 07:29:57 PM	Republish	Sync Now	Stop Sync
	paid tickets test	5/13/2014 07:00:00 PM	CRM Innovation LLC	Online Event	0/3		Republish	Sync Now	Start Sync
	Test Event - Do not sign up	12/31/2013 09:00:00 AM	CRM Innovation	Test Event - Do not sign up Online Meeting - Tue, Dec 31, 2013 09:00 AM	12/15	6/17/2014 02:30:08 PM	Republish	Sync Now	Start Sync

- Event Status** – The first column of the table shows the Event Status of the Event by means of colored circle indicators: Green=Live, Orange=Draft, Blue=Completed, Red=Cancelled.

The table can be filtered by Event Status through use of the **Event Status Filter** on/off toggle buttons above the table (lighted=on, greyed out=off):

PUBLISHED TO CRM

Live
 Draft
 Completed
 Canceled

- Event Name** – This column shows the Event's Name. This column is searchable and sortable.
- Event Date** – This column shows the Event's Start Date and Time. This column is sortable.
- Event Organizer** – This column shows the Event's Organizer. This column is searchable and sortable.
- Event Location** – This column shows the Event's Location/Venue. This column is searchable and sortable.

6. **Attendees** – This column shows the Tickets Sold / Tickets Available.
7. **Last Sync (UTC)** – This column shows the last date and time the Event’s Eventbrite Order/Registrant information was synced to CRM. This time is kept as UTC time.
8. **Republish** – Clicking the Republish button for any Event in the table will republish the Event’s current Eventbrite Event, Ticket, Venue and Organizer information to CRM.

(NOTE: If after initially publishing your Event to CRM you make changes to the Event, Tickets, Venue or Organizer you will need to use the Republish button to move those changes to CRM.)

9. **Sync Now** – Clicking the **Sync Now** button for any Event in the table will perform an immediate onetime sync of the Event’s Order/Registrant information from Eventbrite to CRM.

*(NOTE: This function is for when you need to get the most up to date Event Order/Registrant information into CRM before the next time the Event is background synced by the ongoing background syncing process. This should only be used for a small number of “outstanding” Event Orders/Registrants/Check-ins and not to sync all of the existing Event Orders/Registrants/Checkins for an event, even one that is Completed and past 14 days ended or Cancelled. For that you can still use the **Start Sync** described below to have the Event’s Orders/Registrants/Check-ins background synced by the background syncing process.)*

10. Stop Sync / Start Sync

- a. **Stop Sync** – If the **Stop Sync** button is showing for an Event that Event’s Order/Registrant/Check-in information is currently being background synced between Eventbrite and CRM. Clicking the **Stop Sync** button will stop this background syncing process.
- b. **Start Sync** – If the **Start Sync** button is showing for an Event that Event’s Order/Registrant/Check-in information is NOT currently being background synced between Eventbrite and CRM. Clicking the **Start Sync** button will start this background syncing process.

*(NOTE: Events that are Live or Completed but still within 14 days of the End Date will stay in a state of background syncing until 14 days after the end date of the event or until the user clicks **Stop Sync** button. When a user uses **Start Sync** for a Cancelled or Completed event that is 14 days past the end date then the background sync will only happen once--syncing all current Orders/Registrants/Check-ins--and then the Event will be removed from the background syncing. If the user adds more Order/Registrant/Check-in information to the Event in Eventbrite the **Start Sync** can always be clicked again setting off another one-time background sync.)*

EVENTBRITE ONLY

Under the Events Section the **Eventbrite Only** tab shows all of the Eventbrite Events that have NOT previously been published to CRM using the Event2CRM application. The Event Table contains the following information about each Event:

1.	2.	3.	4.	5.	6.	7.	8.
EVENT NAME	EVENT DATE	EVENT ORGANIZER	EVENT LOCATION	ATTENDEES			SYNC?
Microsoft Dynamics CRM 2011 Profile Management	1/10/2012 11:00:00 AM	CRM Innovation	Microsoft Dynamics CRM 2011 Profile ManagementOnline Meeting - Tue, Jan 10, 2012 11:00 AM	11/25	Publish		
Microsoft Dynamics CRM 2011 Profile Management	1/24/2012 11:00:00 AM	CRM Innovation	Microsoft Dynamics CRM 2011 Profile ManagementOnline Meeting - Tue, Jan 24, 2012 11:00 AM	7/25	Publish		
Event Management Made Easy	2/7/2012 11:00:00 AM	CRM Innovation	Event Management Made EasyOnline Meeting - Tue, Feb 07, 2012 11:00 AM	2/25	Publish		

- Event Status** – The first column of the table shows the Event Status of the Event by means of colored circle indicators: Green=Live, Orange=Draft, Blue=Completed, Red=Cancelled.

The table can be filtered by Event Status through use of the **Event Status Filter** on/off toggle buttons above the table (lighted=on, greyed out=off):



- Event Name** – This column shows the Event's Name. This column is searchable and sortable.
- Event Date** – This column shows the Event's Start Date and Time. This column is sortable.
- Event Organizer** – This column shows the Event's Organizer. This column is searchable and sortable.
- Event Location** – This column shows the Event's Location/Venue. This column is searchable and sortable.
- Attendees** – This column shows the Tickets Sold / Tickets Available.
- Publish** – Clicking the **Publish** button for any Event in the table will publish the Event's current Eventbrite Event, Ticket, Venue and Organizer information to CRM.

8. Sync?

- a. **Checked** – For any Event in the table if the **Sync?** box is checked when the Event is published to CRM with the **Publish** button it will set up that Event's Order/Registration/Check-in information from Eventbrite to be background synced on an ongoing basis (24x7) to CRM. This background sync process can be stopped at any time by using the **Stop Sync** button for the Event in the **Published To CRM** tab. This background sync process will automatically stop 14 days after the Event has ended.
- b. **Unchecked** – For any Event in the table if the **Sync?** box is left unchecked when the Event is published to CRM with the **Publish** button that Event's Order/Registration information from Eventbrite WILL NOT go into the sync queue and NOT be background synced on an ongoing basis to CRM. The background syncing process can be started at any time by using the **Start Sync** button for the Event in the **Published To CRM** tab.

*(NOTE: If the user is planning on using [Advanced Matching](#) for the Event the **Sync?** box should remain UNCHECKED when Publishing the Event. Once the Advanced Matching settings for the Event have been setup on the Event record in CRM the Event can be set to background sync by using the **Start Sync** button for the Event in the **Published To CRM** tab of the application.)*

CRM: EVENT RECORD

The Event Entity is where the basic Event information Published from Eventbrite is kept. This includes information such as the Event Name, Organizer, Capacity, Private Event, Event Start and End date/time, Event time zone and duration. You can also find the Event's Status (Draft/Live/Completed/Cancelled), if the Event's Order/Registrant information is syncing to Eventbrite and the last date/time such a sync occurred.

There are also sub-grids on the Event Entity form to show all of the Event Tickets, Event Orders and Event Registrants associated to an Event.

Most of this information is kept in read-only fields as it is information published directly from the Event in Eventbrite. Below are described some non read-only fields that you may use to better manage your Events beyond what exists in Eventbrite.

Venue Info

To help you manage the Event venue information you can set booking and online meeting information in the **Venue Info** section of the **Event** record:

Venue Info	
Venue	Arvest Bank Theatre at the Midland
Booking Complete?	Yes
Presenter Passcode	235467
Attendee Passcode	100053
Online Meeting URL	gotomeeting.com\meeting
Audio Info	800-555-1111

1. **Booking Complete?** – Use this Y/N field to indicate whether or not the venue has been booked for this Event.
2. **Presenter Passcode** – Use this text field to store any presenter passcode information for an online Event.
3. **Attendee Passcode** - Use this text field to store any attendee passcode information for an online Event.
4. **Online Meeting URL** - Use this text field to store the meeting url for an online Event.
5. **Audio Info** – Use this text field to store the conference call telephone number or any other audio information for an online Event.

NOTIFICATION CONFIGURATION

(These features are currently under development and will be forthcoming in a future release)

To help you manage the ticket sales you can set the notification options for the following trigger points in the **Sales and Revenue** section of the **Event** record:

Sales and Revenue	
Notification Configuration	
Tickets Remaining	2
Viability Threshold	2
Notify When Sold	<input checked="" type="checkbox"/>
Notification User	justin cole
Viability	Viable
Ticket Sales	
Tickets Sold	2
Tickets Remaining	8
Total Sales Revenues	

1. **Tickets Remaining Threshold** – Set this number to notify the **Notification User** via email when “X” number of tickets remain for the Event.
2. **Viability Threshold** – Set this number to notify the **Notification User** via email when a minimum number of tickets to hold the event have been sold.
3. **Notify When Sold Out** – Check this box to notify the **Notification User** via email when the event is sold out.
4. **Notification User** – Select which CRM User who will receive the notification emails.
5. **Event is Viable** – This bit is flipped to “Yes” when the Viability Threshold is met.

EVENT WIDGETS

(These features are currently under development and will be forthcoming in a future release)

If you want to create code for Event Widgets to put on your website there are 6 different options available:

1. **Calendar** – Widget with a month calendar with clickable dates that have events scheduled. Updated from the Event2CRM with all Live events that are scheduled and have not occurred.
2. **Countdown Timer** – Does what it says – a widget for your website to countdown the time to the big event.
3. **Link** – A text hyperlink that will open up the hosted registration page in a new Window.
4. **Registration Page** – The complete code set in a div tag to put the registration form on your company website.
5. **Ticket Form** – Just the ticket registration form that can be included on your website to complement the information on the Event. Enhances the call to action.
6. **Button** – A nice looking button for the website to provide a link to the hosted registration page.

To generate carry code for one of the above widgets select the desired widget type in the **Carry Code Type** field found in the **Website Info** section on the Event form and click the **Generate Carry Code** button on the command bar (under the ... drop down area).

The screenshot shows the Event2CRM interface for an event titled "Event2CRM User Guide Test Event". The top navigation bar includes "MARKETING", "Events", and "Event2CRM User G...". Below the navigation bar, there are action buttons: "+ NEW", "DEACTIVATE", "DELETE", "EMAIL A LINK", and "RUN WORKFLOW". A dropdown menu is open, showing options: "Start Dialog", "Publish", "Generate HTML", "HTML Editor", "Copy Event", "Generate Carry Code" (highlighted with a red oval), "Test Subdomain 1", "Test Subdomain 2", "Test Subdomain 3", and "Form Editor". Below the event information, the "WebSite" section is visible, with a "Carry Code" field (highlighted with a red oval) and a "Calendar" button.

CALENDAR

The screenshot shows a calendar for March 2011. The days of the week are S, M, T, W, T, F, S. The dates are 1 through 31. The date 2 is highlighted in orange. Below the calendar, the event "Ground Hog Day" is listed with the date "March 2nd, 2011 at 8:00 AM". There is an orange button labeled "Register Now!" and a link labeled "Tweet This Event".

COUNTDOWN TIMER

The screenshot shows a countdown timer. The large number "15" is displayed, followed by "DAYS REMAINING UNTIL". Below this, the event name "test" is shown, followed by the date and time "February 23rd, 2011 at 8:00 AM". There is an orange button labeled "Register Now!" and a link labeled "Tweet This Event".

LINK[Register for the Sunday Event](#)BUTTON

CLICK AND REGISTER

TICKET FORM

Ticket Information			
TYPE	END		QUANTITY
Test Event Ticket	Feb 23, 2011	Free	1 <input type="button" value="v"/>
			<input type="button" value="Register"/>

REGISTRATION PAGE

The screenshot shows an Eventbrite registration page for an event titled "test". The event is scheduled for Wednesday, February 23, 2011, from 8:00 AM to 10:00 AM (CT). The page includes social media sharing options (Facebook, LinkedIn, Twitter, Like), a "Ticket Information" table, a "When" section with a calendar icon and "Add to my calendar" link, an "Event Details" section with "Join us for test", "When:" and "Where:" fields, and a "Hosted By" section for "IAMPC - KC Chapter" with a description and links to view other events, contact the host, and subscribe to notifications. A "Register" button is located below the ticket table. Contact information for IAMPC - KC Chapter is provided at the top and bottom of the page.

TYPE	END	QUANTITY
Test Event Ticket	Feb 23, 2011	Free 1

When
Wednesday, February 23, 2011 from 8:00 AM - 10:00 AM (CT)
[Add to my calendar](#)

Event Details
Join us for test
When:
Wed Feb 23 08:00:00 CST 2011 to Wed Feb 23 10:00:00 CST 2011
Where:
[Insert your link text here](#)

Hosted By
IAMPC - KC Chapter
The International Association of Microsoft Channel Partners (IAMCP) is the preeminent networking venue for Microsoft Partners in the world. It brings the best partners together to leverage their joint strengths in delivering world class solutions to their clients while enhancing their ties to Microsoft.
[View other IAMPC - KC Chapter events](#)
[Contact the Host](#)
[Subscribe to receive notifications of future events by this host](#)

CRM: EVENT RECORD-ADVANCED MATCHINGADVANCED MATCHING

By default every Event will be set to match and associate existing CRM Contacts/Leads to the Event Order (Purchaser Contact/Lead) and Event Registrant (Registrant Contact/Lead) using the Default E-Mail Matching settings which can be set in the Event2CRM application under [Admin|Settings|Event Purchaser/Registrant](#) section.

The screenshot shows the "Advance matching" settings in the Event2CRM application. There are two radio buttons: "Purchaser/Registrant" and "E-mail". The "E-mail" radio button is selected and highlighted with a red oval.

The Advanced Matching section on the Event record allows the user to set up each Event individually to do Purchaser and Registrant Contact/Lead matching by other means:

Advance matching	
1. Purchaser/Registrant	Registration Question
2. Match Entity	Contact
3. Match Field Schema	new_accountnumber
4. Match Registration C	What is your Account Number?

- 1. Purchaser/Registrant Matching By** – defaults for every event to “Email” (described above), can be set to “Access Code” or “Registration Question” (described below).
- 2. Match Entity** – Choose the CRM Entity (Contact or Lead) to look through for matches.
- 3. Match Field Schema Name** – Put the CRM field’s schema name where the matching criteria can be found on the CRM entity record.
- 4. Match Registration Question** – This field is only available when “Registration Question” is chosen in #1. In this field the user puts the question from the Eventbrite Order Form for the Event that will be capturing the desired match information. *(NOTE: This needs to be exactly the way it appears in Eventbrite)*

There are two options for Advanced Matching:

- 1. Access Code** – If you have set the Event in Eventbrite to use Access Codes (see: [Reveal Your Hidden Tickets with Access Codes](#) article by Eventbrite) then when an Access Code is used to place an Order thru Eventbrite that Access Code can be used to look for a matching existing Contact/Lead in CRM.
- 2. Registration Question** – If the Event Order form in Eventbrite has been set up with a custom question (such as “What is your Account Number?”) the answer provided at the time of placing an Order thru Eventbrite can be used to look for a matching existing Contact/Lead in CRM.

Here are some general rules that apply to Advanced Matching of either kind:

- When you publish an Event using the Event2CRM application for which you would like to setup Advanced Matching you should not check the **Sync?** box on the **Eventbrite Only** tab when you are clicking the **Publish** button. Rather you should click the **Publish** button with the **Sync?** box unchecked, then once the Event record has been created in CRM use the Advanced Matching section of the Event

record to set up the Advanced Matching as desired. Then AFTER completing that setup using the Event2CRM application go to the **Published To CRM** tab and click the **Start Sync** button for that Event.

2. The Advanced Matching will only be used to fill the Purchaser Contact/Lead lookup field (on the Event Order) and to fill the Registrant Contact/Lead lookup field (on the Event Registrant) if the Registrant info is the same as the Purchaser info. For any Event Registrants with unique and different information from the Purchaser (ie “guests”) those Event Registrant records will use the Default Email Matching to fill the Registrant Contact/Lead lookup fields.

3. If the Advanced Matching criteria provided thru the Eventbrite ordering (ie the Access Code or the Answer to the Registration Question) cannot find a match in existing Contact/Lead record in CRM then the Purchaser Contact/Lead lookup field (on the Event Order) and the Registrant Contact/Lead lookup field (on the Event Registrant) will be left blank. This way the Event administrator can see there was an issue and a match could not be found.

4. If on the Order in Eventbrite the match criteria is not provided (ie no Access Code or Answer to the Registration Question is given) then for that Event Order and Event Registrants the Contact/Lead matching will use to the Default Email Matching.

CRM: EVENT TICKET RECORD

EVENT TICKETS

Ticket Types you create for your Event in Eventbrite will be written to an Event Ticket record in CRM with the ticket detail information when you Publish/Republish your Event using the Event2CRM application:

EVENT TICKET : INFORMATION

Test Event 1 Ticket 1

General

General

Ticket Name *	Test Event 1 Ticket 1	Eventbrite Id	26127415
Event *	Test Event 1	Minimum Tickets per	1
Ticket Price *	\$0.00	Maximum Tickets per	--
# Tickets Available *	100	Tickets Sold	1
Tickets Remaining	99	Sales Revenues	--
Include Service Fee	No	Is Donation?	Yes

Sales Period

Event Start Hour	02	Sales Start Hour	--	Sales End Hour	08
Event Start Minutes	00	Sales Start Minutes	--	Sales End Minutes	00
Event Start Period	PM	Sales Start Period	--	Sales End Period	AM
Event Start Day	1	Sales Start Day	--	Sales End Day	1
Event Start Month	August	Sales Start Month	--	Sales End Month	August
Event Start Year	2014	Sales Start Year	--	Sales End Year	2014

The Event Tickets associated with an Event can be seen in the Event Ticket sub-grid on the Event Form:

Event Tickets									
Event Form Event Ticket Sub-Grid View (Active)									
Ticket Name ↑	# Tickets Availa...	Tickets Sold	Tickets Remaini...	Ticket Price	Sales Revenues	Minimum Ticke...	Maximum Ticke...	Sales Start	Sales End
Test Event 1 Ticket 1	100	1	99	\$0.00		1			12/31/1969 5:00...
Test Event 1 Ticket 2 (add by rep...	25	0	25	\$0.00		1			

CRM: EVENT VENUE RECORD

EVENT VENUES

The Location for your Event in Eventbrite will be written to an Event Venue record in CRM with the name and address information when you Publish/Republish your Event using the Event2CRM application.

You will be able to set the Capacity and Wheelchair Accessible fields on the CRM record:

General			
General			
Name *	Kauffman Center for the Performing Arts		
Eventbrite Id	6868401	City	Kansas City
Address Line 1	1601 Broadway Blvd	State or Province	MO
Address Line 2	--	ZIP or Postal Code	--
Country	United States	Country *	US - United States of America
Latitude	39.09390	Longitude	-94.58740
Facility Info			
Capacity	--	Wheelchair Accessib	No

An Event Venue record “Online” will be created/used for any events you Publish/Republish from Eventbrite that have their Location as Online.

The Event Venue record is used in the **Venue** lookup field on the Event form where you may also indicate whether the Venue has been booked for the Event and enter any Online Meeting information:

Venue Info			
Venue	Online Event	Presenter Passcode	12345
Booking Complete ?	No	Attendee Passcode	67890
		Online Meeting URL	www.meetingurl.com
		Audio Info	conference call # = 800-555-1111

CRM: EVENT ORDER RECORD

EVENT ORDERS

An Event Order represents a transaction to “purchase” one or more tickets. The Event Order will include information from the Event Order in Eventbrite:

General			
General			
Order Name	DailyBckgrndSync1 Test8-29-2014 Order for Daily Ev2 Sync Testing at 8/29/2014 7:38:35 AM		
Event	Daily Ev2 Sync Testing	Quantity Ordered	1
Event Date	9/30/2014 7:00 PM	Amount Paid	\$0.00
Purchaser Name	DailyBckgrndSync1 Test8-29-2014	Order Date Time	8/29/2014 7:38 AM
Purchaser Email	ev2demo@crminnovation.com	Payment State	Placed
Purchaser Contact	DailySync1 Test7-21-2014	Order Id	334006689
Purchaser Lead	--	Order Changed	8/29/2014 12:38:49 PM

It will also be related to an Event Registrant record in CRM corresponding to each attendee/ticket “purchased” on that order ... displayed in the Event Registrants sub-grid on the Event Order Record:

Event Registrants

Registrant Name ↑	Email Address	Ticket	Check-In Status
Jessica CRMI	jessica@crminnovation...	Multi-Tickets	Checked In
Jessica CRMI	jessica@crminnovation...	Multi-Tickets	Not Checked In

CRM: EVENT REGISTRANT RECORD

EVENT REGISTRANTS

An Event Registrant represents an identified Eventbrite Attendee to an event. An Event Registrant record is created for each ticket ordered and associated with the corresponding Event Order record in CRM.

If the Eventbrite Order Form settings require information for each individual attendee/ticket ordered an Event Registrant with unique information will be created for each one.

Otherwise, if the Eventbrite Order Form settings require information for the ticket buyer/purchaser only an Event Registration for each ticket will be created with duplicate registrant information (with only the Check-In Barcode ID i.e. the Ticket #, being different between the two records).

EVENT ORDER : INFORMATION

Order for Test Old Ev2CRM 2.0.3.9 Event at 5/31/2014 8:00 AM

Order Id 296771633

Event Registrants

Registrant Name ↑	Email Address	Ticket	Check-In Status
Jessica CRMI	jessica@crminnovation...	Multi-Tickets	Checked In
Jessica CRMI	jessica@crminnovation...	Multi-Tickets	Not Checked In

EVENT REGISTRANT : INFORMATION

Jessica CRMI

General

Registration Info

Registrant Name * Jessica CRMI	Ticket	Multi-Tickets
	Event Order	Order for Test Old Ev2CRM 2.0.3.9 Event at 5/31/2014 8:00 AM

Check-in Information

Check-In Issue Date 5/19/2014 1:57 PM	Check-In Barcode Sc 296771633375269507001
Check-In Name 375269507	Check-In Status Checked In

EVENT REGISTRANT : INFORMATION

Jessica CRMI

General

Registration Info

Registrant Name * Jessica CRMI	Ticket	Multi-Tickets
	Event Order	Order for Test Old Ev2CRM 2.0.3.9 Event at 5/31/2014 8:00 AM

Check-in Information

Check-In Issue Date 5/19/2014 1:57 PM	Check-In Barcode Sc 296771633375269507002
Check-In Name 375269507	Check-In Status Not Checked In

At the minimum an Event Registrant will include the First and Last Name, and E-mail Address of the attendee.

Each Registrant record has both a Registrant Contact and Registrant Lead lookup field where existing or created CRM Contact/Lead records can be associated with the Event Registrant record(s). These fields are filled based on the Default Email Matching settings and the Advanced Matching settings on the Event record.

Registrant Contact or Lead	
Registrant Contact	<u>Justin CRMI</u>
Registrant Lead	--

Other information required for attendees/tickets as set in the Eventbrite Order Form settings area will be written to the Event Registrant record in CRM.

EVENT REGISTRANT : INFORMATION

Justin CRMI

Contact Info

Email Address  justincrmi@test.com

Phone # 888-555-1111

Cell Phone # 888-555-2222

Personal Info

Sex **Male**

Birth Date Day **1**

Birth Date Month **January**

Birth Date Year **1976**

Address Info

Address Line 1 **1234 Main Street**

Address Line 2 **--**

City **Lenexa**

State **KS**

Country **US**

ZIP/Postal Code **66214**

CRM: EVENT REGISTRATION ANSWER RECORD

EVENT REGISTRATION ANSWERS

Eventbrite allows you to create custom questions for your registrants to answer. After an order has been synced by Event2CRM to your CRM system these answers are kept as Event Registration Answer record and can be most easily viewed from the Event Registration Answers sub-grid on the Event Order record:

Event Registration Answers			
Registrant ↑	Question	Question Type	Answer
Bob Marco	Do you come up with all equipment?	Multiple_Choi...	Yes
Bob Marco	Your comments for this event.	Text	good event it will very helpful.
Mike Marco	Do you come up with all equipment?	Multiple_Choi...	No
Mike Marco	Your comments for this event.	Text	event comments for testing

Or the Registration Answers sub-grid on the Event Registrant record:

Registration Answers		
Question ↑	Question Type	Answer
Do you come up with all equipment?	Multiple_Choi...	Yes
Do you come up with all equipment?	Text	Yes

QUICK START

1. Create or have existing Events in your Eventbrite account.
2. [LOGIN](#) to the Event2CRM application from the Event2CRM Dashboard in CRM or from the web at <https://ev2.crminnovation.com>. *(You may have to register before logging in the first time, see the Event2CRM Installation & Setup Guide for step by step registration instructions.)*
3. In the Event2CRM application navigate to the [ADMIN|Settings](#) tab and make sure the Event Purchaser/Registrant section Default E-mail Matching settings are set to your desired preferences.
4. In the Event2CRM application navigate to the [EVENTBRITE ONLY](#) tab. Find the Event you wish to Publish to CRM in the table and hit the **Publish** button.
 - a. For an Event that is not going to be setup for [ADVANCED MATCHING](#) and that the user wants to set to background syncing immediately the **Sync?** box can be checked. *(This will set the Event to sync any new Event Order/Registrant/Check-in data from Eventbrite to CRM on an ongoing basis until the Event has been completed for more than 14 days or the user uses the **Stop Sync** button).*
 - b. For an Event that is going to be setup for [ADVANCED MATCHING](#) or that the user does not want to set to background syncing immediately the **Sync?** box can be left unchecked. You can however set the Event to start background syncing Event Order/Registrant/Check-in information at any time by using the **Start Sync** button on the [PUBLISHED TO CRM](#) tab as described below.
5. In CRM navigate to the CRM [EVENT](#) grid view *(the section, Marketing/Settings/etc, will depend on how your CRM administrator has set up the CRM Sitemap)*. Here you will find your published Event listed. You can open the Event record to see the details of the Event, add further details in the Venue and Notification sections, set the Event up for [ADVANCED MATCHING](#) and see related Tickets, Orders and Registrants.

- a. If you do not see any related Order or Registrant information on your Event the Order/Registrant/Check-in information has either yet to background sync (if the **Sync?** box was checked when you Published the Event with the Event2CRM application) or the Event is not set to be background syncing (if the **Sync?** box was unchecked when you Published the Event with the Event2CRM application). You can use the **Synced To Eventbrite?** field on the Event record to determine which the case is. If you need to start the Event to background syncing Order/Registrant/Check-in information use the **Start Sync** button found on the [PUBLISHED TO CRM](#) tab as described below.

In the Event2CRM application navigate to the [PUBLISHED TO CRM](#) tab. On this tab you may do the following:

- b. See the basic information for the Events you have already published to CRM from your Eventbrite account, including the last time the Event Order/Registrant/Check-in information was synced
- c. Use the **Republish** button to update CRM with any additions/changes you made to the basic Event information, Tickets, Venue or Organizer in Eventbrite.
- d. Use the **Sync Now** button to initiate a one-time immediate sync of a small number of Event Orders/Registrants/Check-ins that have been added to Eventbrite since the last background sync of the Event to CRM.
- e. Use the **Start/Stop Sync** button to either start or stop the ongoing background sync process for the Event Order/Registrant/Check-in information from Eventbrite to CRM.

EVENTBRITE FEATURES NOT SUPPORTED

1. Deleted Orders or Parts of Orders is not supported by the Eventbrite API, user should use the Cancel Order or Part of Order function in EB instead.
2. Partially Refund order status is not supported by the Eventbrite API and will show as Placed in CRM.
3. When collecting ticket buyer or attendee information the Eventbrite API does not support the Prefix, Suffix or Age questions so that information is not transferred to the Event Registrant record form in CRM.
4. The Event Location Zip Code is not supported by the Eventbrite API and therefore cannot be added automatically to the Event Venue record in CRM. The field is editable so the user can add the Event Venue's zip code by hand if required.
5. The Ticket Sales Start Time is only returned by the Eventbrite API if it is manually set in the Edit Ticket Info section of Eventbrite. If the Sales Start Time for the Ticket Type is set by default by Eventbrite the API does not return this information. If this information (Ticket Sales Start Date/Time) is missing from your Event's Ticket records you will need to go into Eventbrite, manually set a Ticket Sales Start Time and then use the Event2CRM tool to "Republish" the Event.