

Creating an Event Walkthrough



Events and Reporting Outline

Chapter Events

The chapter events tab is where you will go to create a new event or find events that you have already made.

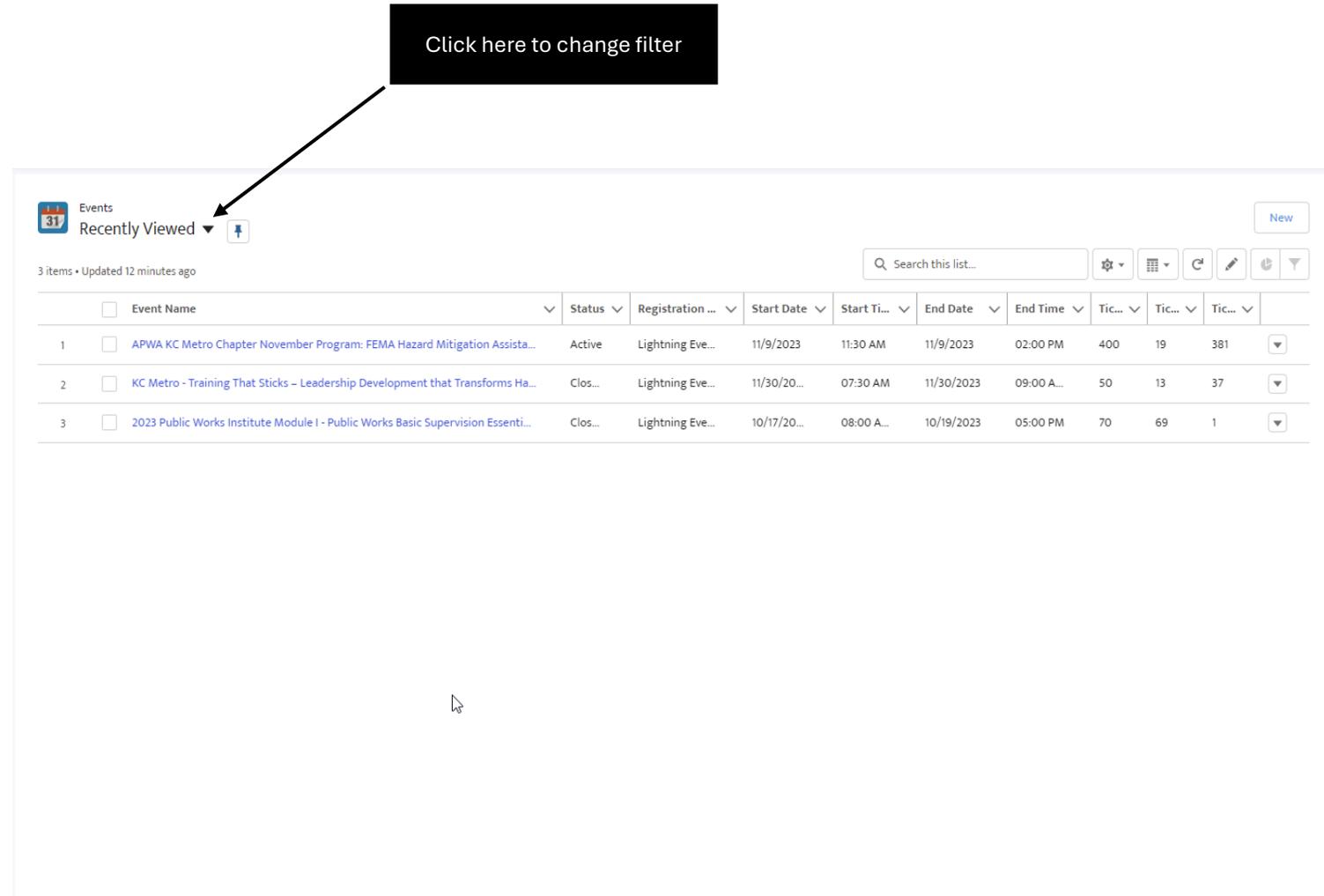
Event Attendee Report

This is where you will go to pull reports for your chapter's events.



Events Homepage

- This page will allow you to see all of your current and old events.
- You can click the drop-down arrow for different filter options for your chapter's events.
- To create a new event, you will click the New button in the top right.



The screenshot shows the Events Homepage interface. At the top left, there is a calendar icon with the number 31 and the text "Events". Below it, a dropdown menu is set to "Recently Viewed" with a small blue icon to its right. A black callout box with the text "Click here to change filter" has an arrow pointing to the dropdown arrow. In the top right corner, there is a "New" button. Below the header, there is a search bar with the placeholder text "Search this list..." and several utility icons (gear, list, refresh, edit, share, and filter). Below the search bar, it says "3 items • Updated 12 minutes ago". The main content is a table with the following columns: Event Name, Status, Registration, Start Date, Start Time, End Date, End Time, and three columns labeled "Tic...". There are three rows of event data.

	<input type="checkbox"/>	Event Name	Status	Registration ...	Start Date	Start Ti...	End Date	End Time	Tic...	Tic...	Tic...	
1	<input type="checkbox"/>	APWA KC Metro Chapter November Program: FEMA Hazard Mitigation Assista...	Active	Lightning Eve...	11/9/2023	11:30 AM	11/9/2023	02:00 PM	400	19	381	▼
2	<input type="checkbox"/>	KC Metro - Training That Sticks - Leadership Development that Transforms Ha...	Clos...	Lightning Eve...	11/30/20...	07:30 AM	11/30/2023	09:00 A...	50	13	37	▼
3	<input type="checkbox"/>	2023 Public Works Institute Module I - Public Works Basic Supervision Essenti...	Clos...	Lightning Eve...	10/17/20...	08:00 A...	10/19/2023	05:00 PM	70	69	1	▼

Create New Event

Clone an existing event

Create event from scratch

* Event Name

Cameron's Office Party

* Registration Style

Lightning Event

* Event Category ?

Chapter Events

Cancel

Save & Continue

1. Click “Create event from scratch”. Please **don’t** clone any events.
2. Event name will be the title of your upcoming event (this will be the external name).
3. Make sure the registration style is set to *Lightning event* and the Event category is set to *Chapter Events*. (Same as pictured above)
4. Click Save & Continue

Event Builder Main Page

- Along the left-hand side of the page will be different tabs you will use to help guide you through building this event
- **Event Info:** Where the main details of your event will be entered (date, time, description)
- **Tickets:** Create pricing options and tickets for your event
- **Speakers:** Highlight bio information of any speaker attending
- **Pages:** Clean up options for your page

You will not use the Invitation, Venues, Agenda, Sponsor Packages, Statuses, Theme, or Community Settings Page tabs.

The screenshot shows the 'Event Builder' interface. On the left, a vertical navigation menu contains several tabs: 'EVENT INFO' (selected and circled in red), 'TICKETS', 'INVITATION', 'VENUES', and 'ACCESS PERMISSIONS'. The main content area is titled 'Event Builder' and includes a 'Save & Refresh' button, a 'Preview In' dropdown, a 'Status: Planned' dropdown, and 'Edit In Salesforce' and 'Save' buttons. The 'Event Info' section contains the following fields:

- * Event Name: KCMetro_10/2/2024
- * Event Display Name: Cameron's Office Party
- Event Dates:
 - 24-Hour Time
 - * Start Date: 10/02/2024
 - * Start Time: 08:00 AM
 - * End Date: 10/02/2024
 - * End Time: 08:00 AM
- Duration

Event Info

1. The event name needs to be the name of your chapter along with the date of the event (i.e., KCMetro_10/2/2024). This can help you organize your events internally
2. Make sure the event display name is correct. The event name is what shows externally so only you will be able to see it. The event display name is what is shown on the user's side. Set your date and time parameters.
3. Select the correct time zone for where your event is being held.

The screenshot displays the 'Event Builder' interface with a sidebar on the left containing navigation options: EVENT INFO, TICKETS, INVITATION, VENUES, ACCESS PERMISSIONS, SPEAKERS, and AGENDA. The main content area is titled 'Event Builder' and includes a 'Save & Refresh' button, a 'Preview In' dropdown, and a 'Status: Planned' dropdown. The 'EVENT INFO' section is active, showing the following fields:

- *Event Name:** KCMetro_10/2/2024 (An arrow points to this field with a callout box that says 'Only seen internally').
- *Event Display Name:** Cameron's Office Party (An arrow points to this field with a callout box that says 'What the user will see').
- Event Dates:**
 - 24-Hour Time
 - *Start Date:** 10/02/2024
 - *Start Time:** 05:00 PM
 - *End Date:** 10/02/2024
 - *End Time:** 07:00 PM
 - Duration:** 2 hours
 - *Time Zone:** (GMT-05:00) America/Chicago
- Event Info Details:**
 - Enable Event Display Name and Date/Time
 - Featured Event

Location and Date Text

1. What you enter in this field is going to appear in the top right corner of the registration page. The bottom image is preview of where the information will go on the live page.
2. Make sure to enter time and start date.

▼ Event Info Details

Enable Event Display Name and Date/Time ⓘ Featured Event ⓘ

Location and Date Text ⓘ

1200 Main Street
Kansas City, MO 64105
10/2/2024

Event Overview

B *i* U **A:** [Align Left] [Align Center] [Align Right] [Justify] [List Bulleted] [List Numbered] [Link] [Image] [Table] [More]

Type something



Where this will show on your event page

Event Overview

Featured Speakers

Featured Sponsors

Primary Venue

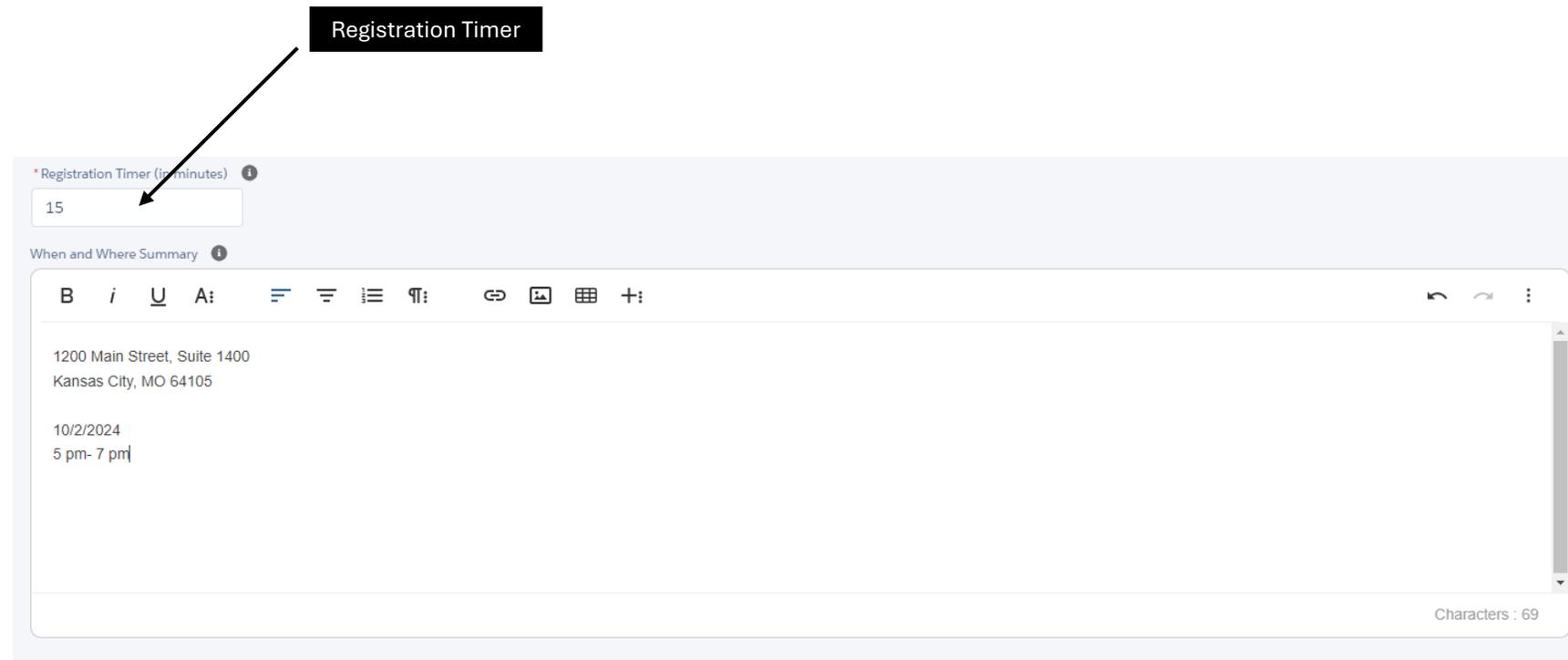
Event Overview

1. This is where all the details of your event will go.
2. You can either type out all the details of your event as shown in the image, or if you have a flyer you'd like to add you can email chapterservices@apwa.org to have it included on the page. You cannot copy and paste an image into this field.
3. You do not need to add anything in the description field.

The image shows a screenshot of a web form for an event overview. It is divided into three main sections:

- Location and Date Text:** Contains the address "1200 Main Street, Suite 1400, Kansas City, MO 64105".
- Event Overview:** A rich text editor with a toolbar (bold, italic, underline, link, list, etc.). The text inside reads: "Come join us for a day of celebration! There will be food and drinks available in the Kitchen." Below this, there are two sections: "Date & Time" with "10/2/2024" and "5 pm-7 pm", and "Where" with "1200 Main Street, Suite 1400, Kansas City, MO 64105". A character count "Characters : 179" is visible at the bottom right of this section.
- Description:** A large, empty text area. A black callout box with the text "Leave this blank" and an arrow points to this field.

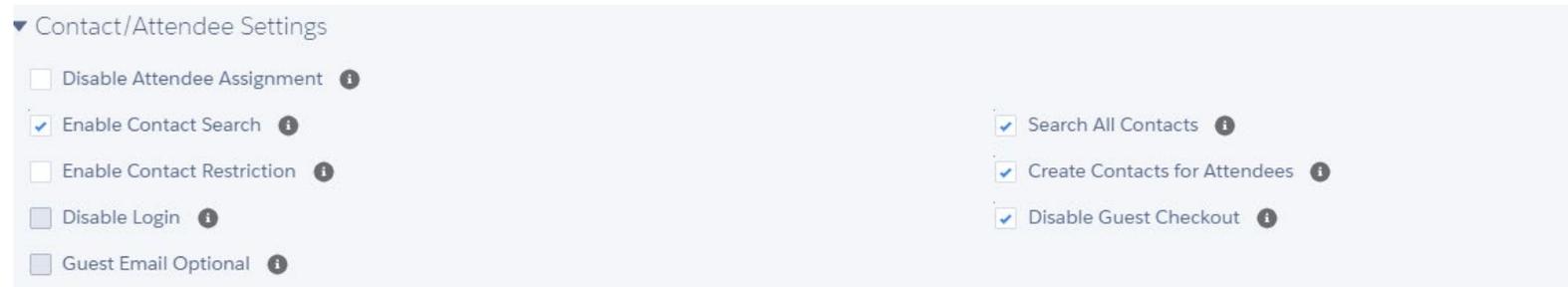
1. The registration timer indicates how long someone has to complete their event registration, with a maximum limit of 99 minutes.
2. In the "When and Where" summary, enter the details of when and where the event will take place. These details will be displayed after someone registers for the event.
3. You can copy and paste the location & date section into the when and where summary.



The image shows a screenshot of a web form for event registration. At the top, there is a field labeled "Registration Timer (in minutes)" with the value "15" entered. A black callout box with the text "Registration Timer" and an arrow points to this field. Below this is a section titled "When and Where Summary" which contains a rich text editor. The editor has a toolbar with icons for bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, table, and insert. The text in the editor reads: "1200 Main Street, Suite 1400", "Kansas City, MO 64105", "10/2/2024", and "5 pm- 7 pm". At the bottom right of the editor, it says "Characters : 69".

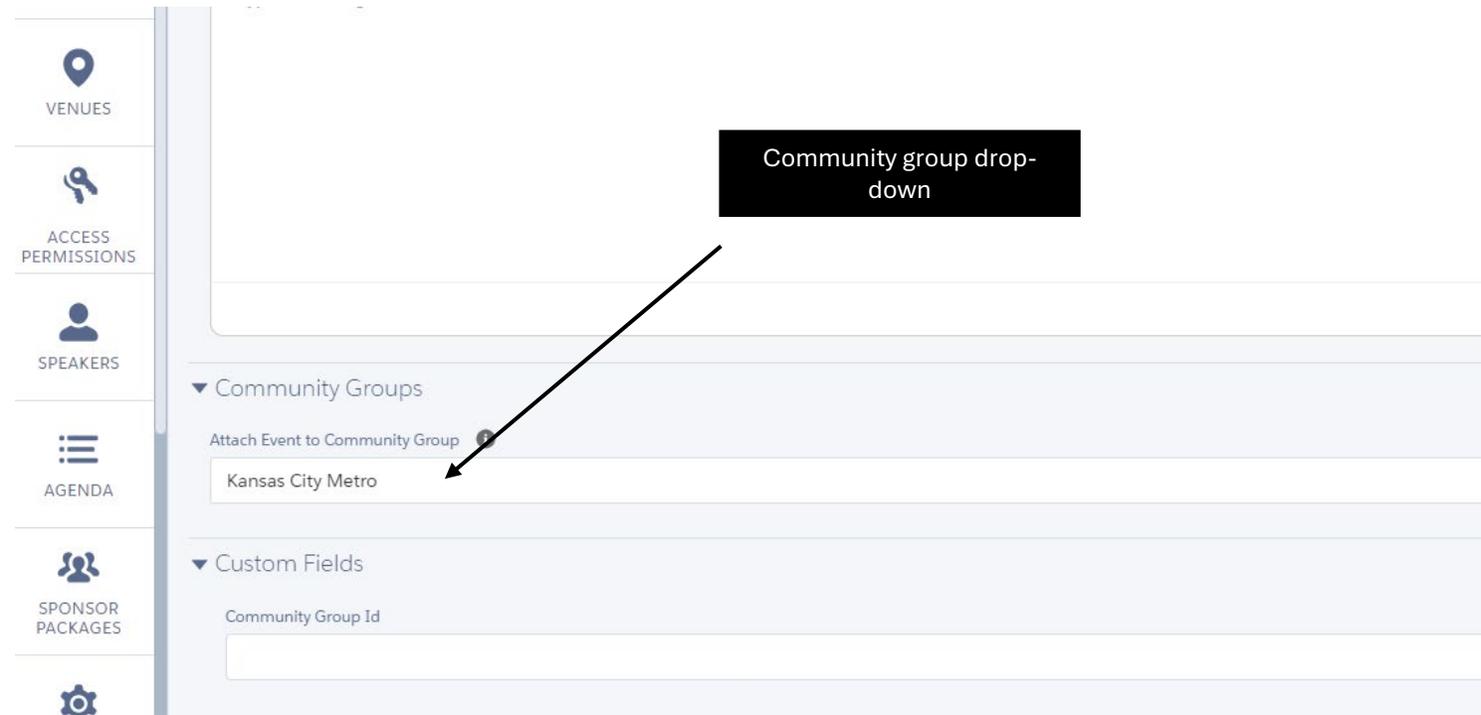
Contact/ Attendee Settings

1. This is where you will capture the information of people who are registering. There are 4 default options you need to choose.
2. **Enable contact search:** Allows users to search for other individuals within their organization and register them for the event.
3. **Search all contacts:** this allows users to register anyone that is in our database. This is helpful for administrators who have a new account not associated with their organization to search for people.
4. **Create Contacts for Attendees:** This allows for someone to create a contact if they aren't able to find that individual in the system by searching.
5. **Disable Guest Checkout:** Salesforces requires someone to be logged in when registering as part of their safety measures.
6. *After completing this section, scroll down to community groups*



Community Groups

1. Click on the drop-down for the community group and select your chapter.
2. It's crucial to set your community group to your specific chapter, as this allows the APWA finance team to accurately allocate funds for the event.



Tickets

1. This section will create the pricing options & how many tickets can be sold for the event.

Event Builder Save & Refresh Preview In Status: Planned Edit In Salesforce Save

EVENT INFO

TICKETS

INVITATION

VENUES

ACCESS PERMISSIONS

SPEAKERS

Ticket Types (0)

There are no tickets. [Create a new ticket type](#)

Manage Inventory + New Ticket Type

Purchaser Form

Ticket Display Order: Price (high -> low)

*Ticket Sales Start Date: 10/02/2024

Registration Instructions

Type something

Click here to reach this page

Click either of these to make a new ticket

Tickets

1. Mark the box “is published” & “is active”
2. Name your ticket and add the price (Tickets shouldn’t have any more than 15 characters in the name).
3. Enter in details of the tickets in the description

Create Ticket Type

Check this box if you want people to know how many tickets are available

Make sure these are checked

DESCRIPTION ALTERNATE PRICING

Is Published ⓘ Is Active ⓘ

Enable Ticket Waitlisting ⓘ

Restrict Quantity Per Order ⓘ

Minimum Quantity

Maximum Quantity

Show Tickets Remaining ⓘ

* Ticket Name * Price

Description ⓘ

Comes with one free drink

Ticket Information ⓘ

B *i* U **A:**

Type something

Cancel Save & Continue

Group ticket option

1. If the ticket is for a group, such as a sponsorship, table, or foursome, etc, you will need to scroll down and select "Is Group Ticket Type."
2. Type in the what type it will be and select how many people are included in the ticket. The below is an example of a ticket for a foursome that includes 4 people.

DESCRIPTION ALTERNATE PRICING

Ticket Image URL ⓘ
Browse for files or paste in 

Is Group Ticket Type ⓘ Make sure this is checked

* Group Type ⓘ * Attendees Per Group ⓘ

Enable Refund Request ⓘ

Refund Request Policy ⓘ

B *i* U **A:**         

Type something

Early Bird Pricing

1. For early bird pricing, select the alternate pricing tab at the top and check the “enable early-bird price” box.
2. Enter the early bird price and pick the date that it will end. (In this example, it will end at midnight on 10/1/2024)

DESCRIPTION	ALTERNATE PRICING
List Price USD 30.00	
<input checked="" type="checkbox"/> Enable Early-Bird Price ⓘ	
* Early-Bird Price	* Early-Bird End Date
<input type="text" value="20.00"/>	<input type="text" value="10/01/2024"/>
<input type="checkbox"/> Enable On-Site Price ⓘ	
On-Site Price	
<input type="text"/>	

Ticket Inventory

1. Enter in the number of tickets that are being sold for this ticket type. If you can allow 100 members to attend your event, then you select 100.
2. If you have Two different types of tickets, but have a capacity of 100, then you will want to split the tickets 50/50 so you don't oversell the event.
3. Ticket inventory can be modified any time throughout the event.

Click manage inventory to bring up the below screen

Ticket Types (1)

	NAME	LIST PRICE	ACTIVE	PUBLISHED	ACTIONS
	Member	USD 30.00	✓	✓	

Purchaser Form ⓘ

[Manage Inventory](#) [+ New Ticket Type](#)

Manage Inventory

Event Ticket Capacity **100**

[Ungroup Selected](#) [Group Selected](#)

	NAME	AVAILABLE QUANTITY
<input type="checkbox"/>	Member	<input type="text" value="100"/>

Speakers

1. To add a speaker, click on the speaker tab.
2. Change status to “accepted” otherwise the speaker will not show.
3. You can upload a photo of your speaker
4. Enter in a bio of your speaker
5. You can add more than one speaker.

Event Builder Save & Refresh Preview In Status: Planned

VENUES

Speakers (0)
Drag and drop Speakers

ACCESS PERMISSIONS

There are no speakers

SPEAKERS **Speaker Tab**

AGENDA

SPONSOR PACKAGES

New Speaker

* Speaker Name Status ⓘ
Scott Grayson Considering

Contact Record Is Featured

Title Company Name
CEO

Speaker Photo URL
Browse for files or paste in

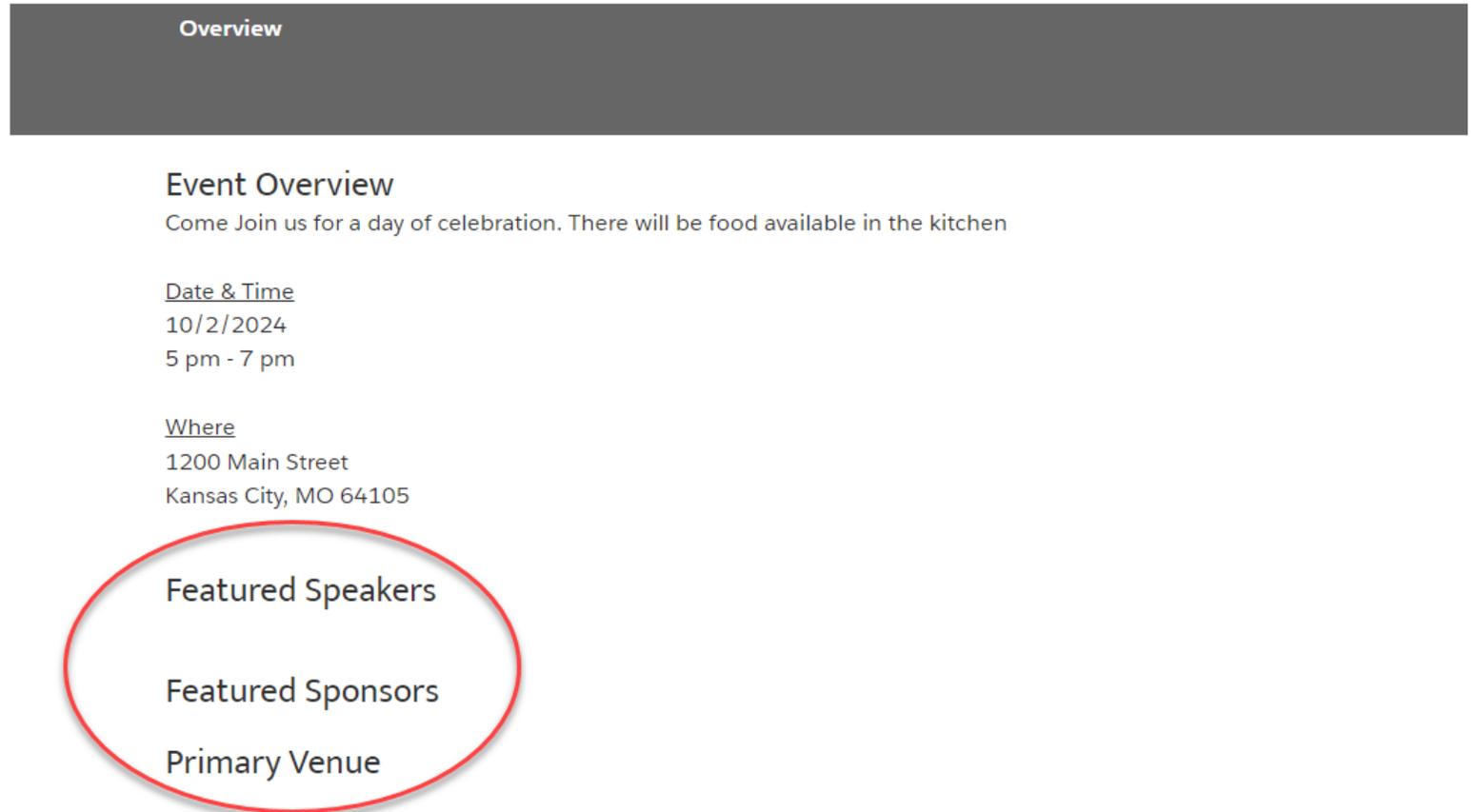
Speaker Bio

Pages

If you want to get rid of the Featured Speaker, Featured Sponsor, and Primary Venue headings, then follow these steps:

1. Click on the Pages tab
2. Hit the 3 dots under actions on the Overview line
3. Select Manage components
4. Click on the trash can for featured speakers, featured sponsors, and primary venue.

Illustrated on the next page



The screenshot shows a dark grey header with the word "Overview" in white. Below the header, the text "Event Overview" is followed by a description: "Come Join us for a day of celebration. There will be food available in the kitchen". Underneath, there are two sections: "Date & Time" with the date "10/2/2024" and time "5 pm - 7 pm", and "Where" with the address "1200 Main Street, Kansas City, MO 64105". At the bottom, three items are listed: "Featured Speakers", "Featured Sponsors", and "Primary Venue". A red circle is drawn around these three items.

Event Status

1. You can either set your event status to planned, active, or closed.
2. *Planned* is when you are still working on building your event and it's not ready to go live.
3. *Active* is when the event is ready to go live and people can purchase tickets.
4. *Closed* will turn off registration and no longer allow people to access the page. This is how you turn registration off. It's important to note that this will not happen automatically. You will need to go in and manually close it once your event is over.
5. To preview your event, make sure to change the status to active and hit "preview in"

The screenshot shows a user interface for an event titled "Cameron's Office Party". At the top right, a black box labeled "Status" has an arrow pointing to a blue button that says "Status: Active". To the left of this button are two other buttons: "e & Refresh" and "Preview In". Below the navigation bar, the event title "Cameron's Office Party" is displayed in a dark grey header, along with the address "1200 Main Street, Suite 1400 Kansas City, MO 64105" and the date "10/2/2024". The main content area is titled "Event Overview" and includes a description: "Come join us for a day of celebration! There will be food and drinks available in the Kitchen." Below this, there are sections for "Date & Time" (10/2/2024, 5 pm-7 pm), "Where" (1200 Main Street, Suite 1400, Kansas City, MO 64105), "Featured Speakers", "Featured Sponsors", and "Primary Venue".

PERMISSIONS

Active (Active) + New Page

MOVE	NAVIGATION LABEL	BROWSER LABEL	PUBLISHED	ACCESS PERMISSIONS	ACTIONS
	Overview	Overview	<input checked="" type="checkbox"/>		
	Agenda	Agenda			
	Venues	Venues	<input type="checkbox"/>		
	Speakers	Speakers	<input type="checkbox"/>		
	Sponsors	Sponsors	<input type="checkbox"/>		

Pages Tab (points to PAGES in sidebar)

Click this and select "manage components" (points to the 'More actions' icon in the Agenda row)

Save & Close

Event Overview

Featured Speakers

Featured Sponsors

Primary Venue

Registration

October 2024

Delete these 3 (points to the delete icons for Featured Speakers, Featured Sponsors, and Primary Venue)

Pulling a Chapter Event Report

To pull a registration report for any of the events you set up, you will want to follow the following steps:

1. Click on chapter events
2. Select your event you are looking to pull a report for.



<input type="checkbox"/>	Event Name	Status	Registration ...	Start Date	Start Ti...	End Date	End Time	Tic...	Tic...	Tic...	
1	<input type="checkbox"/> APWA KC Metro Chapter November Program: FEMA Hazard Mitigation Assista...	Clos...	Lightning Eve...	11/9/2023	11:30 AM	11/9/2023	02:00 PM	400	19	381	▼
2	<input type="checkbox"/> KC Metro - Training That Sticks - Leadership Development that Transforms Ha...	Clos...	Lightning Eve...	11/30/20...	07:30 AM	11/30/2023	09:00 A...	50	13	37	▼
3	<input type="checkbox"/> 2023 Public Works Institute Module I - Public Works Basic Supervision Essenti...	Clos...	Lightning Eve...	10/17/20...	08:00 A...	10/19/2023	05:00 PM	70	69	1	▼

1. Once you are in the event you will copy the event URL link.
2. After the link is copied, return to the homepage,

 Event
APWA KC Metro Chapter November Program: FEMA Hazard Mitigation Assistance + Follow

Event Category	Status	Registration Style	Start Date/Time	End Date/Time	Ticket Sales Start Date
Chapter Events	Closed	Lightning Event	11/9/2023, 1:30 PM	11/9/2023, 4:00 PM	10/12/2023

DETAILS RELATED

Event Category ⁱ Chapter Events	Business Group ⁱ APWA
Event Name APWA KC Metro Chapter November Program: FEMA Hazard Mitigation Assistance	Community Group ⁱ Kansas City Metro
Display Name ⁱ APWA KC Metro Chapter November Program: FEMA Hazard Mitigation Assistance	Event Key ⁱ 4fdf1f62-1118-4
Status ⁱ Closed	
Event URL https://my.apwa.org/eventapi__router?event=a1mjx000002BqF3	
Capacity ⁱ	Sold Out ⁱ
Total Event Capacity ⁱ	

Post Poll
Share an update...
Search this feed...



1. Click into the “Event Attendee Report”



Event Attendee Report

1. Click on the filter option
2. Click on the Event URL
3. Paste the URL in the bottom field
4. Click apply to pull up the event registration report.

From here you can pull a detailed report into an excel document for your records.

The screenshot shows the 'Event Attendee Report' interface for the 'KC Metro Chapter'. The report title is 'Report: FON - Attendees with Registration Items Event Attendee Report'. The total number of records is 19. A table lists attendees with columns for Event Name, Account Name, and other details. A 'Filter By' dialog box is open, showing the 'Event URL' field selected, the operator 'equals', and the URL 'https://my.apwa.org/eventapi_router?event=' entered. The 'Apply' button is highlighted. A 'Filters' panel on the right shows the current filter settings.

	Event: Event Name	Account: Account Name			
1	APWA KC Metro Chapter November Program: FEMA Hazard Mitigation Assistance	City of Edgerton, KS			
2	APWA KC Metro Chapter November Program: FEMA Hazard Mitigation Assistance	OWN, Inc.			
3	APWA KC Metro Chapter November Program: FEMA Hazard Mitigation Assistance	Staff Account Household			
4	APWA KC Metro Chapter November Program: FEMA Hazard Mitigation Assistance	Staff Account Household			
5	APWA KC Metro Chapter November Program: FEMA Hazard Mitigation Assistance	Meghan Woolbright Household			
6	APWA KC Metro Chapter November Program: FEMA Hazard Mitigation Assistance	Mikayla Dendurent Household			
7	APWA KC Metro Chapter November Program: FEMA Hazard Mitigation Assistance	Jared McPhee Household		Registered	USD
8	APWA KC Metro Chapter November Program: FEMA Hazard Mitigation Assistance	Richard Wilson Household		Registered	USD
9	APWA KC Metro Chapter November Program: FEMA Hazard Mitigation Assistance	City of Independence, MO	City of Independence, MO	Registered	USI
10	APWA KC Metro Chapter November Program: FEMA Hazard Mitigation Assistance	Olsson Inc	Olsson Inc	Registered	USI

1. Filter

2. Event URL

3. Paste URL here & apply

For Questions:

- Contact by email at chapterservices@apwa.org
- Please provide as much information as possible
- If you would like a 1-1 training session, please also reach out to the chapterservcies@apwa.org email to set up a time.
- If you need assistance planning your event, click [here](#) to access our event template. Complete the form and send it to Chapter Services to get everything set up.