

Creating Events

Overview

Events represent interactions with entrepreneurs such as skill workshops, grapevine monthly meetings, lunch and learns, and expos. You can create events one by one in the app on the Events page or import events in bulk. Each event is associated to one or more grants, which allows participants to be tracked in grant reporting metrics such as entrepreneurs served. Events can be backdated so they count for metrics after the event has occurred.

Create One Event

1. Click **Interactions > Events** on the top navigation bar
2. Click **Create new event**
3. Ensure that the auto-selected grant is correct or select a different grant
4. Fill out the required fields denoted by an asterisk and optional fields as needed
 1. **Title**
 2. **Description**
 3. **Host:** business or entity hosting the event
 4. **Start date**
 5. **End date**
 6. **Guest attendees:** these attendees are counted toward all grant metrics (e.g., entrepreneurs engaged and businesses served)
 7. **Staff:** These attendees are only counted toward the entrepreneurs served metric. Use this option for situations like a guest speaker or volunteer at an event. They are counted as an entrepreneur engaged, however, their business wasn't directly served.
5. Click **Create**

Import Multiple Events

Use this method if you want to plan out multiple future events more efficiently than entering them one by one. This only includes the event information, not the attendee registration information. When importing grants, you can only associate an event to a single grant. After the import, you can associate events to multiple grants if needed by editing the events.

1. Click **Interactions > Events** on the top navigation bar

2. Click **Import**
3. You can import events in several ways covered below

Import Events and Attendees

Use this method if you are entering events that already occurred or upcoming events for which you have attendee registration information.

1. Click the dropdown button named **Hosted Events and Attendees (Multiple Sheets)** to download an Excel workbook containing 2 worksheets
2. Fill out information for the events in the **Hosted Events** worksheet
 1. First associated grant
 1. One of the following fields must be entered
 2. `first_grant_id`: the system ID of the first grant this event is associated with
 3. `first_grant_name`: the exact name of the first associated grant
 2. title
 3. description
 4. Entity (business) information
 1. One of the following fields must be entered
 2. `entity_id`
 3. `entity_name`: the exact name of the entity that is hosting the event
 5. Dates
 1. Date format can be yyyy-mm-dd, mm/dd/yyyy, and several other options. If the date format is incorrect, the system will notify you. Then try changing the format and re-import the data. Be aware of issues with Excel and CSV files having different formats, especially if you are working between different operating systems (e.g., from Windows to macOS)
 2. `start_date`
 3. `end_date`
 6. location: location that an event was held. No specific format is required and it doesn't link to an address in the system.
 7. `import_context`: A note added to the imported record for traceability later on. This is helpful for large amounts of imported data in which you may need to verify the import results.
3. Fill out information for attendees in the **Hosted Event Attendees** worksheet
 1. Event information to associated attendees to events
 1. One of these fields must be filled out
 1. `hosted_event_id`: system ID of the event (only relevant when adding attendees to an existing event)
 2. `hosted_event_title`: exact title of the event already in the system or in the other worksheet
 2. Attendee (user) information
 1. One of these fields must be filled out
 1. `user_id`: system ID of the attendee if they already exist
 2. `first_name`: first name of the attendee

3. last_name: last name of the attendee
4. email: unique email address of the attendee
5. event_role
 1. One of these exact values must be used to denote the type of attendee. Currently, there are 2 only 2 options, however, this could be expanded later.
 2. **guest:** these attendees are counted toward all grant metrics (e.g., entrepreneurs engaged and businesses served)
 3. **staff:** These attendees are only counted toward the entrepreneurs served metric. Use this option for situations like a guest speaker or volunteer at an event. They are counted as an entrepreneur engaged, however, their business wasn't directly served.
6. phone: 10-digit phone number for the attendee. Only enter the numeric digits and no spaces, hyphens, parentheses, etc.
7. import_context

Import Events Only

1. Click the dropdown **Hosted events**
2. Click **CSV** or **Excel** to download a template
3. Fill out the template based on the information above
4. Select the format, upload the file, and click **Import**
5. Correct any errors as necessary

Import Attendees Only

1. Click the dropdown button named **Hosted Events and Attendees (Multiple Sheets)** to download an Excel workbook containing 2 worksheets
2. Skip the **Hosted Events** worksheet as this is only for new events
3. Fill out information for attendees in the **Hosted Event Attendees** worksheet
 1. Event information to associated attendees to events
 1. One of these fields must be filled out
 1. hosted_event_id: system ID of the existing event
 2. hosted_event_title: exact title of the existing event
 2. Attendee (user) information
 1. One of these fields must be filled out
 1. user_id: system ID of the attendee if they already exist
 2. first_name: first name of the attendee
 3. last_name: last name of the attendee
 4. email: unique email address of the attendee
 5. event_role
 1. One of these exact values must be used to denote the type of attendee. Currently, there are 2 only 2 options, however, this could be expanded later.

2. **guest:** these attendees are counted toward all grant metrics (e.g., entrepreneurs engaged and businesses served)
 3. **staff:** These attendees are only counted toward the entrepreneurs served metric. Use this option for situations like a guest speaker or volunteer at an event. They are counted as an entrepreneur engaged, however, their business wasn't directly served.
 6. phone: 10-digit phone number for the attendee. Only enter the numeric digits and no spaces, hyphens, parentheses, etc.
 7. import_context
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