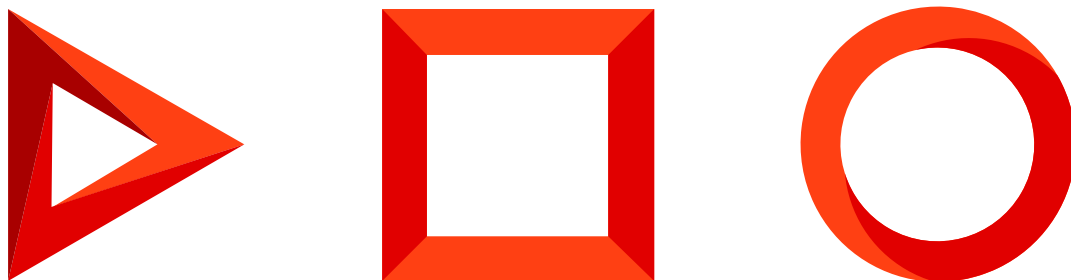


Marketing events

Version 8.0



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Plan marketing events

PRODUCTS: **ALL CREATIO PRODUCTS**

Events are occurrences that are held for defining customer needs, attracting new customers, and educating the existing ones. Webinars, tutorials, exhibitions, and other marketing projects can all be managed within the [*Events*] section.

Ensure proactive communication with potential and existing customers, plan your budget, select your target audience, assign the responsible team, analyze the efficiency of the conducted marketing campaigns and make corrections based on the analysis results with the [*Events*] section.

To create an event:

1. Navigate to the [*Events*] section
2. Click [*New Event*]
3. Fill out the event data:

Name	Name of the event. This is a required field.
Type	Event type, for example, "Seminar" or "Exhibition." This is a required field.
Status	Event status, for example, "Planned" or "In progress." This is a required field.
Owner	Creatio user, responsible for the event. This is a required field.

4. If necessary, fill out general event information on the [*General Information*] tab:

Start date	The start and end dates of the time period for the event.
Due date	
Goal	The main goal to be achieved by the event or by your company during the event, for example, "Customer acquisition" or "Report delivery".
Coverage area	Target area to be covered by the event, for example, "Rural areas" or "Megalopolises."
Industry	Target industry for which the event is conducted, for example, "Insurance" or "Production."
Actual response	The number of event participants.

5. If necessary, specify the financial indicators.

The financial Indicators reflect the estimated and actual expenses and revenue of your event.

Expected budget, base currency.	The estimated cost of the event in the base currency.
Actual cost, the base currency	Actual expenses for the event in the base currency.
Expected revenue, base currency	Sales revenue obtained as a result of the event.
Actual revenue, base currency	Revenue from marketing resulting from the marketing campaign.

6. Specify team details by adding a list of contacts and accounts involved in the preparation of the marketing event.

Event	Event name. This is a non-editable field.
Account	Company working on the event.
Contact	Member of the event team.
Role	The role that the contact plays within the event, for example, “Customer” or “Performer.”
Description	Additional information about the team member.

7. Specify the audience details on the [*Audience*] tab. For more information, please refer to the [Manage event audience and responses](#) article.8. Track the history of the event using the [*History*] tab:

- a. Use the [*Activities*] detail to manage tasks connected to the current event. This detail displays information from the [\[*Activities* \] section](#). Activities are linked to events via the [*Event*] field of the activity page.
- b. Use the [*Products*] detail to manage the list of products involved in the event.

Event	Name of the event that the product is involved in. This is a non-editable field.
Product	The product involved in the event.
Description	Additional information about the product.

- c. Manage the emails linked to the event in the [*Emails*] detail. Emails are linked to events manually or automatically according to the [*Rules for connecting emails to system sections*] lookup. Read more: [Work with emails](#).
- d. The list of marketing campaigns that an event is used in is available in the [*Campaign*] detail. It displays information from the [\[*Campaigns* \] section](#). The connection between an event and a campaign is

established when the event is added to the campaign flow via the [*Add from event*] element.

9. Use the [*Attachments and notes*] tab to retrieve and update detailed information about the event, as well as attachments and links to the web resources related to the event.
 - a. Store files and links related to the event on the [*Attachments*] detail. For example, you can attach a cost estimation sheet for the event or a presentation file.
 - b. Store additional information about the event on the [*Notes*] detail. You can edit and organize your lead notes on the detail. If you switch to another tab of the event page, the information on the [*Notes*] detail is saved.
10. Access feed messages connected to the event on the [*Feed*] tab.

Manage event audience and responses

PRODUCTS: **ALL CREATIO PRODUCTS**

An event audience in Creatio is a list of event participants, i. e. contacts connected to the event. Keep track of the event audience responses in marketing campaigns, business processes, dashboards, and on the event page.

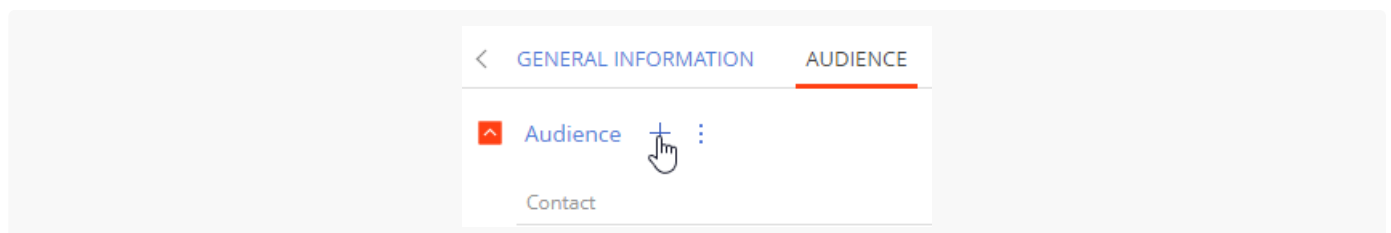
Manage the list of event participants in the [*Audience*] tab:

- add contacts and contact folders
- remove participants
- update the event responses
- set up columns and apply filters.

Add audience

1. Go to the [*Audience*] tab on the relevant event page.
2. Click **+** (Fig. 1) on the [*Audience*] detail. This will open a contact list.

Fig. 1 Add audience



3. Select the desired records manually or filter them by set conditions in the contact list. After that, click [*Import*] and select the import option from the menu:
 - If you applied the **filter conditions** or selected a **folder** to import, click [*Import by filter*] (Fig. 2).
 - If you selected the desired records **manually**, click [*Import selected*].
4. Click [*Close*].

Fig. 2 Import by filter

The screenshot shows the 'Import audience: Networking Day' interface. At the top, there are 'CLOSE' and 'IMPORT' buttons. A dropdown menu is open under 'IMPORT', with 'Import by filter' selected. The filter criteria are: AND Lead (by column Contact).Predictive score sum > 50. Below the filter, there is an 'Add condition' button. The main area displays a list of contacts with their details:

Account	Name	Job title	Email	Business phone	Mobile phone
<input type="checkbox"/>	Alexander Wilson	CEO		+1 212 542 4238	
<input type="checkbox"/>	Account Alpha Business		a.wilson@alphabusiness.com		+1 212 854 7512
<input type="checkbox"/>	Andrew Z. Barber	Specialist		+1 206 480 3801	
<input type="checkbox"/>	Account Infocom		a.barber@gros.com		+1 206 587 1036
<input type="checkbox"/>	Christine Nelson	Specialist		+44 (20) 3488 6553	
<input type="checkbox"/>	Account Build Technologies		christine@novcorp.co.uk		+44 (788) 247 1010

As a result, Creatio will import the desired records to the event audience and display them on the [*Audience*] tab of the event page.

Alternatively, set up a [marketing campaign](#) to add the event audience automatically. Use a special element to add the campaign audience to the event audience. Learn more: [The \[Add to event \] element](#).

Track event responses

An event response is the status of an event participant, such as whether they planned to participate, participated, canceled their participation, or did not respond. View the responses on the [*Audience*] tab next to each record.

Note. Create a lookup named “Response in events” and add the desired statuses as values to change the list of available response statuses. This lookup is not available by default.

Track the event responses and analyze the financial indicators in the [*Dashboards*] section view.

The [*Dashboards*] view includes the following tabs:

1. The [*Audience*] tab. This tab contains event participant statistics.

Note. Creatio will apply the filters set in the section to all dashboards on the tab.

Audience by response	A diagram with the event audience grouped by their responses.
Event participants with leads	An indicator displaying the number of event participant contacts with leads. The indicator only shows contacts with the “Participation confirmed,” “Participated,” and “Planned” responses.
Event participants without leads	An indicator displaying the number of event participant contacts without leads. The indicator only shows contacts with the “Participation confirmed,” “Participated,” and “Planned” responses.

2. The [*Event totals*] tab. This tab contains event summary statistics.

Note. Creatio will apply the filters set in the section to all dashboards on the tab except for the [*Upcoming events*] block.

Expected budget	An indicator displaying the total expected event budget, in the base currency.
Actual cost	An indicator displaying the total actual event costs, in the base currency.
Expected revenue	An indicator displaying the total expected event revenue, in the base currency.
Actual revenue	An indicator displaying the total actual event revenue, in the base currency.
Upcoming events	A list of 5 events that start today or later. The data is sorted by date in ascending order. The closest event appears at the top of the list.
Events by type	A diagram with the events grouped by their type.