

Event Management

This Extension provides Functionality to plan, execute, and review events. This feature allows Users to:

- Plan venues, presenters, sessions, sponsors and event capacity
- Publish Events on the Web
- Allow On-Line Registration by Event Participants
- Create Attendee labels
- Track Participation in specific Events
- Send invitations; automate web registrations, waitlists and track event attendance
- Create Reports to Analyze Event Costs, Sponsors, Speakers and Participants

In short, Event management can be centrally controlled. Microsoft CRM Event management Extension provides a platform to ensure ALL Event Organizers are working off the same data, thus reducing wastage of time.

The Screen Shots on the following pages provide more details of the Event Management Extension.

Campaign Planning

The screenshot displays a web application window titled "Campaign: TEST1 - Information". The interface is divided into a left sidebar and a main content area. The sidebar contains sections for "Details:", "Sales:", and "Marketing:", each with a list of sub-items. The "Details:" section is expanded to show "Information" selected. The main content area has tabs for "General", "Event Details", "Financials", "Administration", and "Notes", with "General" currently active. The "General" tab contains several input fields and dropdown menus for campaign information. At the bottom left, the status is "Active".

Field	Value
Name *	TEST
Campaign Code	CMP-1009-88024
Currency *	د.ب.ش.ع.
Expected Response	100
Status Reason *	Launched
Campaign Type	Event
Exchange Rate	3.670000000
Offer	
Proposed Begin Date	
Actual Begin Date	
Proposed End Date	
Actual End Date	
Description	

A large variety of details of each Event can be recorded by this extension. Some of the related important Event related details are:

1. General Event Information, as shown above
2. Specific Event Details as shown in the next screenshot.
3. Event Financial Details
4. Any Event related objects like presentations, Handouts etc.
5. Event Team Members (Internal and External)
6. Event Breakout sessions and their timings
7. Sponsors for Event

Event Details

The screenshot shows a web browser window with the URL `http://abs-crm:5555/?id={9BA12B8E-4AF0-0D11-BABD-001E9088EB85}` and the title "Campaign: TEST1 - Windows Internet Ex...". The page displays the "Campaign: TEST1" interface with a navigation menu on the left and a main content area with tabs for "General", "Event Details", "Financials", "Administration", and "Notes". The "Event Details" tab is active, showing the following form fields:

- Event Information:**
 - Publish Event Details on Web:
 - Event Type: [Dropdown]
 - Primary Venue: [Text]
 - Maximum Event Capacity: [Text]
 - Manage Registration Count?:
 - Waitlist this Event?:
 - Waitlist Starting Point: [Text]
 - Registration Count: [Text]
- Event Location:**
 - Street 1: [Text: Test Street]
 - Street 2: [Text]
 - Street 3: [Text]
 - City: [Text: Sharjah]
 - State/Province: [Text: Sharjah]
 - Zip/Postal Code: [Text: 12345]
 - Country/Region: [Text]
 - Mapping Url: [Text]
- Web Portal Display:**
 - Event Capacity: [Text]
 - Cost of Admission: [Text]
 - Event Name: [Text: Test Event]
 - Event Topic: [Text]
 - Start Date & Time: [Text: 2/2/2009] [Time: 12:00 AM]
 - End Date & Time: [Text]
 - Event Details: [Text: Test Event Details]
 - Event Brochure URL: [Text]
 - Additional Registration Information: [Text]
 - Event Sponsors: [Text]
 - Event Contact: [Text: Test Contact]

Status: Active

Specific Event Details recorded are:

1. Event Location Details – which are automatically published on the web,
2. Event Capacity planning details, allowing specific users to ensure the same participant data is used for booking the most suitable event location.
3. Facility to control when the Event Details can be exposed on the web – by publishing or un-publishing the event details

Tracking Campaign Response

The screenshot shows the 'Campaign Response' form in Microsoft CRM. The form is titled 'Campaign Response New' and has a 'Notes' tab selected. The form is divided into several sections:

- Campaign Response:** Includes fields for 'Parent Campaign' (with a dropdown menu showing 'TEST1'), 'Promotion Code', and 'Response Code' (with a dropdown menu showing 'Interested').
- Details:** Includes fields for 'Customer', 'Subject', 'Channel', 'Outsource Vendor', 'Received On' (with a date picker showing '2/1/2009'), 'Close By', and 'Originating Activity'.
- Received From New Customer:** This section contains a large number of fields for customer information, including 'Prefix', 'First Name', 'Middle Name/Initial', 'Last Name', 'Suffix/Title', 'Street Address 1', 'Street Address 2', 'Street Address 3', 'City', 'State/Province', 'Postal Code', 'Country', 'Company Name', 'Job Title', 'Phone', 'E-Mail', 'Fax', 'Primary Role in Organization', and 'Preferred Method of Communication'.
- Owner and Priority:** Includes fields for 'Owner' (with a dropdown menu showing 'Admin Demo') and 'Priority' (with a dropdown menu showing 'Normal').

The form is displayed in a browser window with a status bar at the bottom showing 'Status: New', 'Done', 'Trusted sites', and '100%'.

Campaign Responses are used to automatically create new Contacts in Microsoft CRM, thus adding to the CRM database. In case the contact already exists in the CRM database, this can be highlighted by the Microsoft CRM Duplication detection Rules. Based on the de-duplication rules, the multiple instances of the same contact can be merged as required, while still retaining the original category assigned to the contact.