

Eventbrite Set Up and Configuration Guide

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Introduction

The Eventbrite integration is available as an optional module and includes the following services:

- Importing Eventbrite Events in Gold-Vision
- Automatic and continuous updating of Events
- Automatically linking Event Attendees to Gold-Vision Contacts and Accounts

Once integrated, you will be able to benefit from all main Gold-Vision functionalities such as:

- Managing your Events in one place – fully integrated within the core CRM
- Streamlining Event logistics and simplify scheduling
- Exporting your attendee lists to create badges etc.
- Contacting your attendees via Campaigns
- Reporting via Dashboards

Setting Up

The Eventbrite integration is available on a subscription basis and costs £50 per month. Please ensure you are on the latest version of Gold-Vision. Please contact your Account Manager for more information.

Initial Set-Up and Integration

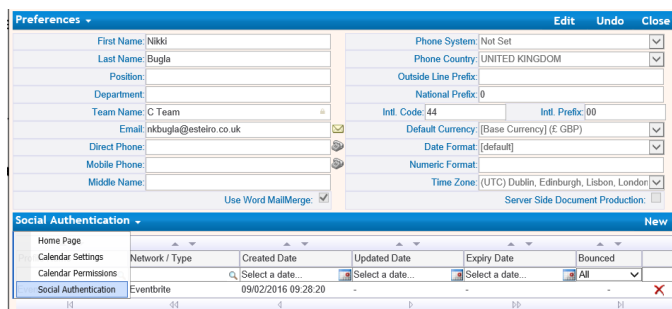
Your Gold-Vision Account Manager and System Administrator will help set up the integration. Please contact them for more information.

Eventbrite Registration

A live Eventbrite account is required. Sign up for free on their website.

Authenticating a user in Gold-Vision

Access your Gold-Vision user preferences and authenticate Eventbrite. Click new and follow the n screen instructions.



Your firewall settings may prompt you to validate www.eventbrite.co.uk as a safe website.

Eventbrite Administration Set Up

In the Gold-Vision Administration Console, you can view the standard integration settings. You can choose to change these settings according to your needs.

Eventbrite Settings

Enable Eventbrite Integration	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Add Anonymous Eventbrite Attendee as	<input checked="" type="radio"/> Anonymous Attendee	<input type="radio"/> Repeat Booking Contact
Unknown Attendee Account Creation	<input checked="" type="radio"/> Single Account	<input type="radio"/> Per Event <input type="radio"/> Per Attendee
Unknown Attendee Account Suffix	<input type="text" value="Unknown Eventbrite Contacts"/>	
Cancelled Order	<input checked="" type="radio"/> Delete Booking	<input type="radio"/> Set Booking Confirmed to No
Gold-Vision Event Owner	<input checked="" type="radio"/> Eventbrite Owner	<input type="radio"/> Gold-Vision Import User
Alert Event Owner if Overbooked	<input checked="" type="radio"/> Yes	<input type="radio"/> No
Dynamically Increment Available Places	<input type="radio"/> Yes	<input checked="" type="radio"/> No

[Save](#)

- **Enable Eventbrite Integration**

This determines whether or not the Eventbrite Integration has been enabled by your Account Manager.
- **Add Anonymous Eventbrite Attendee as**

If you have **not** chosen to collect details from all Attendees in the Eventbrite Order Form, there are two ways you can display the Anonymous Attendees in Gold-Vision:

Anonymous Attendee
A standard Gold-Vision Anonymous Attendee is added to the Booking.

Repeat Booking Contact
The Booking Contact is added for each Anonymous Attendee. So if there are four Anonymous Attendees in an Eventbrite order, the Booking Contact will be added four times as an Attendee.
- **Unknown Attendee Account Creation**

New Attendees will be linked to the relevant Gold-Vision Account by **first matching their email address, and then their domain**. If a matching Account is not found in Gold-Vision, an "Unknown Attendee Account" will be created, and the new Contact placed under that Account. You have three options:

Single Account
One single Gold-Vision Account will hold all unknown Contacts from all Events created via the Eventbrite integration which cannot be matched to an existing Gold-Vision Account.

Per Event
One Account will be created per Eventbrite Event to hold the unknown Contacts. The name of the Gold-Vision Account will be in the form "Event Name - Suffix".
For example, an Event named "GV Webinar" will create an Account called "GV Webinar – Unknown Eventbrite Contacts" to manage unknown Attendees.

Per Attendee
A Gold-Vision Account will be created using the information from the Eventbrite order form, as configured in the Mappings area – for example mapping Company name to the Account Name. An Attendee record will then be created against this new Account.

! In order to link as many Attendees to their corresponding Gold-Vision Accounts, we strongly advise to always complete the Email Domain when creating a new Account in Gold-Vision.
- **Unknown Attendee Account Suffix**

The name of the Gold-Vision Account that stores unknown Contacts is based on the Event name and this suffix value.

- **Cancelled Order**

When an order is cancelled in Eventbrite, this can have one of two effects in Gold-Vision:

Delete Booking

The corresponding Booking in Gold-Vision is deleted. There will be no visible record of the Booking having been made.

Set Booking Confirmed to No

The corresponding Booking in Gold-Vision will be set to "Confirmed?" - "No".

! Please note that Bookings set to "Confirmed?" – "No", will not remove the Attendee from the Session. This could lead to false overbookings.

Orders cancelled in Eventbrite before Gold-Vision has created a corresponding Booking, will still result in the Booking being created and immediately deleted / set to "Confirmed?" - "No".

- **Gold-Vision Event Owner**

This determines who should be the initial owner of imported Eventbrite Events.

Eventbrite Owner

The user with the Eventbrite Social Authenticator will be made the owner of the new Gold-Vision Event.

Gold-Vision Import User

The user who selects the **Import** button will be made the owner of the Event.

- **Alert Event Owner if Overbooked**

! We strongly advise leaving this setting to **Yes**.

If you add Attendees both via Eventbrite and in Gold-Vision, you risk overbooking your Event. Because the integration is One-Way, Eventbrite will still show places available. When an additional Booking is made via Eventbrite, the Event owner will receive a Gold-Vision Alert notifying them of the overbooking of their Event.

! Please note that the additional Attendees will not be added from Eventbrite.

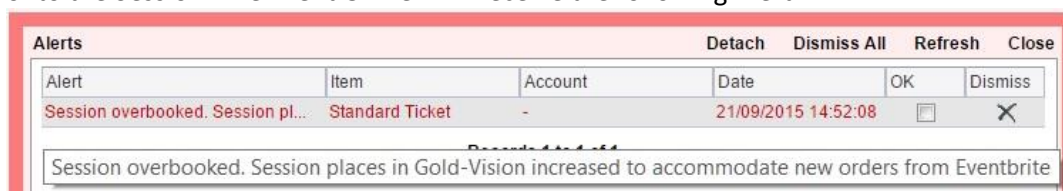


- **Dynamically Increment Available Places**

If you add Attendees both via Eventbrite and in Gold-Vision, you risk overbooking your Event.

Yes

When the Eventbrite integration adds an Attendee to Gold-Vision which causes the Session to be oversubscribed, the **Number of Places** value is incremented to allow the additional Attendees onto the Session. The Event Owner will receive the following Alert:



No

When the Eventbrite integration attempts to add an Attendee to Gold-Vision which causes the Session to be oversubscribed, Gold-Vision will not allow the Attendee to be added to the Session.

! This will cause a discrepancy between the Eventbrite Attendees listed in Eventbrite and those displayed in Gold-Vision so this must be set with caution.

Mapping

In the Administration, under Integrations -> Eventbrite -> Mapping you can find the automatically mapped fields, as well as any additional fields the Customer may need.

The fields marked with a lock are automatically mapped to the Gold-Vision field.

The Third Party Fields including 'flag' are typically checkboxes in Gold-Vision.

You can choose to enter a Default Value for any particular field. This will often be for a checkbox (0 is unchecked, 1 is checked).

The automatically mapped fields are:

Eventbrite Events -> Gold-Vision Seminars

Third Party Field	Gold-Vision Field	Default Value
Event id	EXTERNAL_EVENTBRITE_ID	<input type="text"/>
Event name	SUMMARY	<input type="text"/>
Event description (text)	Details	<input type="text"/>
Event source	SOURCE_DETAILS	Eventbrite

Eventbrite Tickets -> Gold-Vision Sessions

Third Party Field	Gold-Vision Field	Default Value
Ticket class id	EXTERNAL_EVENTBRITE_ID	<input type="text"/>
Ticket name	SUMMARY	<input type="text"/>
Ticket description	DETAILS	<input type="text"/>

! Note: The start and end time of each Session is automatically set to the start and end time of the Event.

Eventbrite Tickets -> Gold-Vision Session Products

Third Party Field	Gold-Vision Field	Default Value
Ticket class id	EXTERNAL_EVENTBRITE_ID	<input type="text"/>
Ticket name	SUMMARY	<input type="text"/>
Ticket description	DETAILS	<input type="text"/>
Tax rate	TAX_PERCENTAGE	<input type="text"/>
Cost in deminal form	PRICE	<input type="text"/>

Eventbrite Orders -> Gold-Vision Bookings

Third Party Field	Gold-Vision Field	Default Value
Order id	EXTERNAL_EVENTBRITE_ID	<input type="text"/>
GV confirmed flag	CONFIRMED	1
Ticket buyer full name	SUMMARY	<input type="text"/>

Eventbrite Attendees -> Gold-Vision Attendees

Third Party Field	Gold-Vision Field	Default Value
Attendee id	EXTERNAL_EVENTBRITE_ID	<input type="text"/>

In Gold-Vision, an Attendee is associated with a Contact record. This will provide details such as contact name and email address and therefore these fields are not mapped within this module.

Eventbrite Attendee -> Gold-Vision Booking Products

When an event is imported from Eventbrite, a custom item is created in Gold-Vision against the Seminar to reflect the cost of attending that event. The custom item is then automatically applied to all Bookings for each Attendee to reflect the cost of the Booking.

Eventbrite Orders -> Gold-Vision Accounts

If an unknown organiser is imported from Eventbrite, a new Gold-Vision Account will be created and the field mappings defined in this page will be applied. In case the Account summary field is still empty, the order email will be mapped here.

Eventbrite Attendees -> Gold-Vision Accounts

If an unknown attendee is imported from Eventbrite, a new Gold-Vision Account will be created and the field mappings defined in this page will be applied. In case the Account summary field is still empty, the attendee email will be mapped here.

Eventbrite Orders -> Gold-Vision Contacts

Third Party Field	Gold-Vision Field	Default Value
GV preferred email flag	PREFERRED_CONTACT_EMAIL	1
GV preferred phone flag	PREFERRED_CONTACT_PHONE	1
GV preferred fax flag	PREFERRED_CONTACT_FAX	1
GV preferred letter flag	PREFERRED_CONTACT_LETTER	1

Eventbrite Attendees -> Gold-Vision Contacts

Third Party Field	Gold-Vision Field	Default Value
GV preferred email flag	PREFERRED_CONTACT_EMAIL	1
GV preferred phone flag	PREFERRED_CONTACT_PHONE	1
GV preferred fax flag	PREFERRED_CONTACT_FAX	1
GV preferred letter flag	PREFERRED_CONTACT_LETTER	1

Eventbrite Attendee Questions -> Gold-Vision Seminar Questions

Third Party Field	Gold-Vision Field	Default Value
Question	SUMMARY	
Question id	QUESTION_ID	
Question type		

Eventbrite Attendee Answers -> Gold-Vision Seminar Booking Attendees Answers

Third Party Field	Gold-Vision Field	Default Value
Answer	SUMMARY	
Answer	ANSWER_EXTENDED	

Eventbrite Integrated Events

Once you have imported your Event to Gold-Vision, your Event will automatically update from Eventbrite until it is complete. Any new Bookings will automatically be imported.

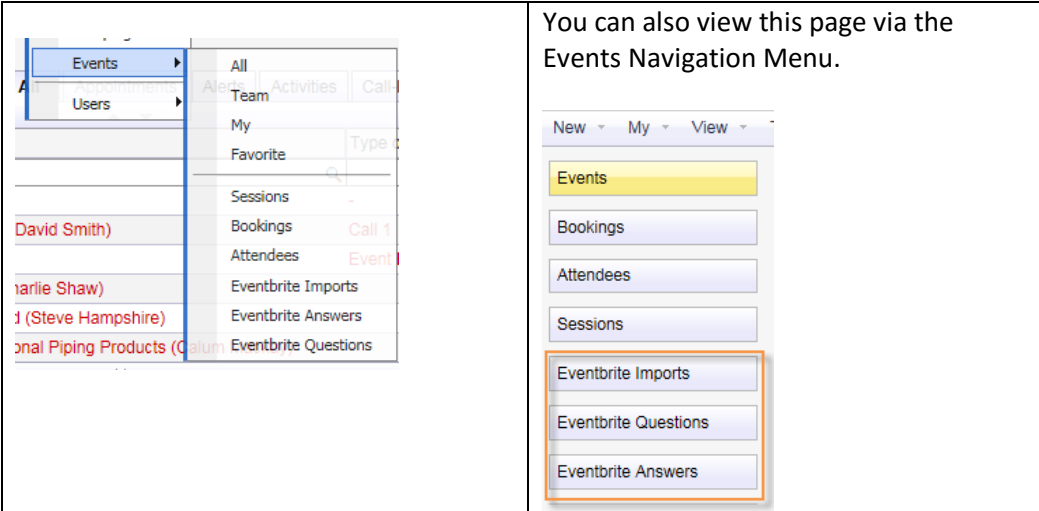
In case you notice some data is being missed by the automatic import (for example due to an internet connection failure), it may be necessary to re-import the Event, by clicking the re-import button in the administration console.

Here you can also see the status of our Eventbrite Events.

Importing Events

Once you are successfully authenticated and integrated with Eventbrite, and have update the Eventbrite settings and mappings to meet your requirements you can create Events in Eventbrite and then start importing your Eventbrite Events into Gold-Vision.


1. Go to the Eventbrite Imports page within Gold-Vision using the **View** menu, then go to **Events** and select **Eventbrite Events**.



The image shows two parts of the Gold-Vision interface. On the left, a navigation menu is open with 'Events' selected, and a sub-menu is visible with 'Eventbrite Imports' highlighted. On the right, a separate navigation menu is shown with 'Eventbrite Imports' highlighted in an orange box. Text to the right of the second menu says: 'You can also view this page via the Events Navigation Menu.'

2. Locate your Event using the normal Gold-Vision list filtering.

Tip: Clicking on the **name** of the Event will take you to the webpage for your Eventbrite Event.



The image shows a screenshot of the Gold-Vision 'Eventbrite Imports' page. The page has a navigation bar at the top with various icons. Below the navigation bar, there is a table with columns: Name, Start Date, End Date, Seminar, Organiser, Created, Changed, Event Status, Import Status, and Import. The first row of data is: 'Sales & Marketing Conference', '01/06/2016 10:00:00', '01/06/2016 17:00:00', '-', 'Gold Vision CRM', '15/09/2015 10:45:26', '15/09/2015 10:45:28', 'Live', 'Not Integrated', and 'Import'. The 'Import' button is highlighted with a red box.

3. Click the **Import** button to import your Event to Gold-Vision.

! As from now, this Event will update automatically and continuously from Eventbrite until the Event is complete.

Any new Bookings will automatically be imported in Gold-Vision. No further action is required.

For each Event you wish to view in Gold-Vision, you will need to go through the above importing process.

The Event is imported initially, then on the next 'poll' the Sessions/Tickets and Bookings will be imported. 'Polls' happen automatically every 10-15 minutes.

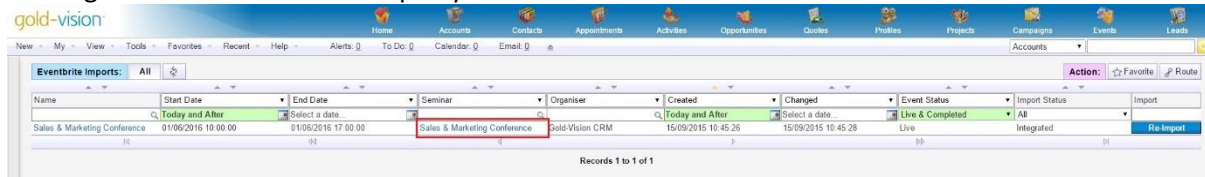
Viewing Events

Once your Event is imported, you can start managing it in Gold-Vision.

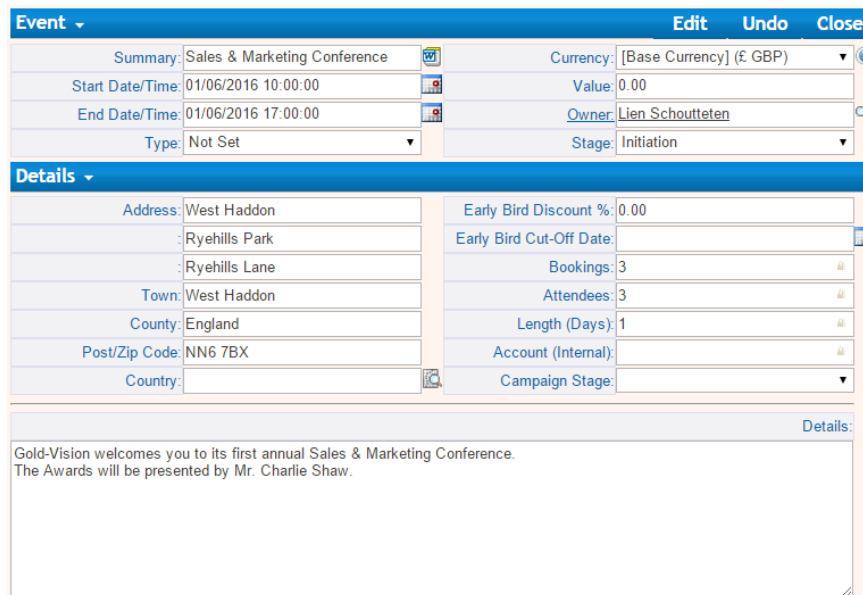
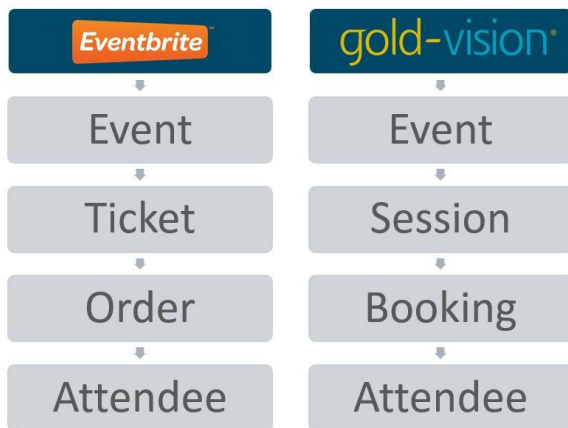
How to view your Event

In Gold-Vision, go to **View**, then to **Events** and **Eventbrite** or click the Event icon.

Clicking on the Event name will open your Event in Gold-Vision.



Eventbrite Events will appear in Gold-Vision as per the graphic below:



Viewing Sessions

Each ticket you have created in Eventbrite will create a Session in Gold-Vision. In order to view the Sessions, open your Event, go to **Details** and select **Sessions**.



From here, you can view how many places there are per Session, how many are booked and available.

Summary	Code	Places	Booked	Available	Day	Start Date/Time	Finish Date/Time
Standard Ticket	-	80	0	80	1	01/06/2016 10:00:00	01/06/2016 11:00:00
VIP Ticket	-	20	0	20	1	01/06/2016 10:00:00	01/06/2016 11:00:00

By default, Gold-Vision will set the Sessions' Start and Finish Times to the times of the Event. You can modify these times manually within Gold-Vision.

Viewing Bookings and Attendees

If you wish to view all the Event Attendees; open your Event, go to **Details** and click on **Attendees**. If you wish to view only the Attendees who booked on a particular Session; open your Event, go to **Details** and then go to **Sessions**. Click on the Session to see only the Attendees for that Session.

Gold-Vision will show the Attendee Name and the Account of the Contact who made the Booking - the buyer.

By clicking on **Open Booking**, you view the Attendees linked to this Booking, i.e. when one person booked tickets for multiple people.

Re-assigning Contacts

Gold-Vision will show the Attendee Name and the Account of the Contact who made the Booking - the buyer. If no matching Accounts are found in Gold-Vision, the new Contact will by default be placed under an "Unknown Attendee Account".

The name of this account will depend on the settings in the Gold-Vision admin console.

You can choose to re-assign Contacts to an existing Gold-Vision Account, or to a new Account.

1. Open your Event, go to **Details** and click on **Attendees**.

2. Click on the Attendee Name you wish to re-assign.
! Note: Here, the Account will always indicate the Account of the person who made the Booking.
3. Click on **Contact**.
4. Go to the Contact menu, select **Re-Assign**, and choose the Account you want to use.
5. If this is the Booking Contact – the buyer, Gold-Vision will ask if you wish to move all Event Bookings with this Contact to the new Account.
 - a. Yes: All Bookings this person made will be put under the new Account
 - b. No: Only this Contact will be put under the new Account.

Extra Gold-Vision Event Functionalities

- Creating Activities against Events
- Exporting Lists to create Badges
- Create Campaigns

Find out more on how to use the Event on the Help Site

Tips

Attendee Details & Order Form

By default, Eventbrite will only request the email address of the person making the order - the buyer. In case a buyer books on any additional attendees, those will remain anonymous. This can be adjusted in each of your Eventbrite Events by editing the **Order Form**.

1. In Eventbrite, select your **User Menu** and go to your Event.
2. Go to the **Manage** tab to manage the Event.
3. In the side menu, select **Order Form**.
4. If you wish to collect details from all attendees, select **Each Attendee**.

Attendee Information

Collection type

- Basic Information
- Buyer Only
- Each Attendee

5. You can now choose which additional details to request from buyers or attendees.
! The email address is essential for Gold-Vision.

Information to collect	Include	Require
Prefix (Mr., Mrs., etc.)	<input type="checkbox"/>	<input type="checkbox"/>
First Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Last Name	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Suffix	<input type="checkbox"/>	<input type="checkbox"/>
Email Address	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Home Phone	<input type="checkbox"/>	<input type="checkbox"/>

! Note: If any of the additional details are not being imported into Gold-Vision, please contact your System Administrator. It may be that those fields were not set up during the integration process.

Domain name

Each new Attendee will be automatically linked to the relevant Gold-Vision Account by matching the domain of their email address. If no matching Accounts are found in Gold-Vision, the new Contact will be placed under an "Unknown Attendee Account" or a new Account can be created using the Attendee name. (Depending on the settings in the Admin Console)

! In order to link as many Attendees to their corresponding Gold-Vision accounts, we strongly advise to always complete the Email Domain when creating a new account in Gold-Vision.

The screenshot shows the 'Account' creation form in Gold-Vision. The form is divided into several sections: 'Account Name', 'Primary Contact', 'Account Manager', 'Details', 'Billing Address', and 'Quick Summary'. The 'Email Domains' field is highlighted with a red box, indicating its importance in the integration process.

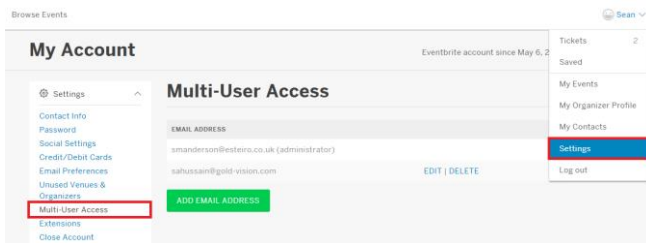
One way integration

The integration with Eventbrite is one way, from Eventbrite to Gold-Vision. Any manual changes made to the Event in Gold-Vision will not appear in Eventbrite.

Multiple Users

You may want to have multiple users accessing the same Eventbrite Event. This is a simple set-up in Eventbrite:

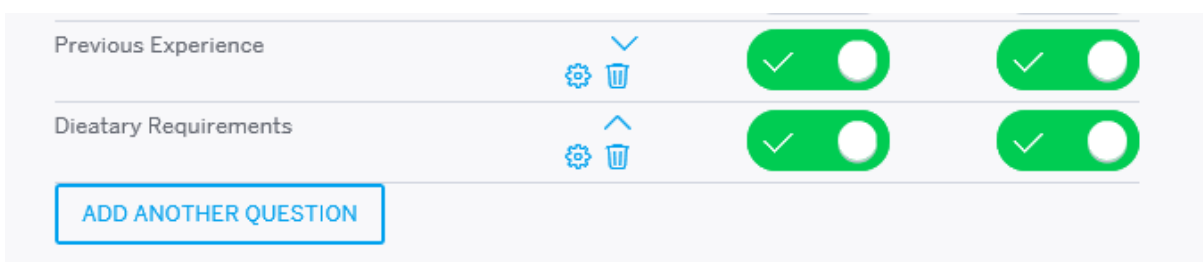
1. In Eventbrite, select your user menu and go to **Settings**.
2. In the side menu, select **Multi-User Access**.



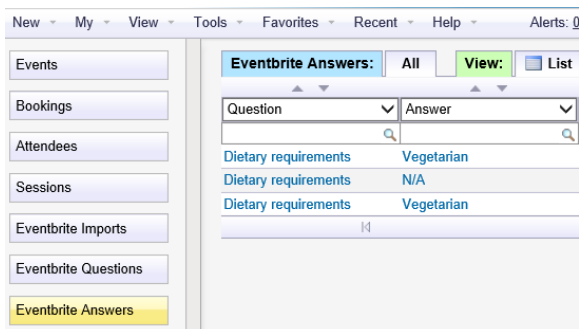
3. Here you can add the appropriate email address and specify any restrictions you may have for the additional user.
4. Authenticate the new user in Gold-Vision: Follow these steps again.

Custom questions

Custom Questions can be added to the Order Form in Eventbrite – such as dietary requirements.



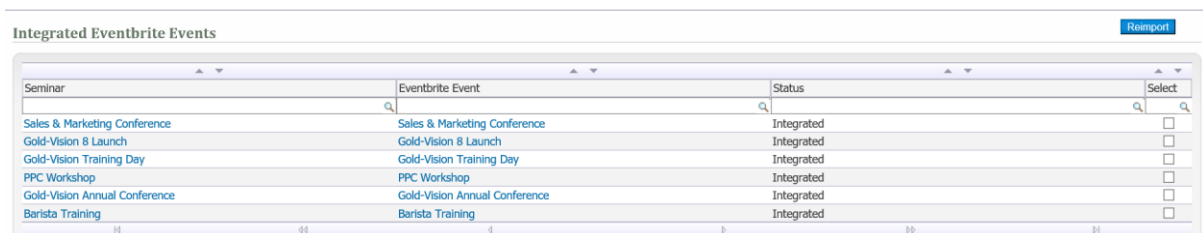
These will be imported in to Gold-Vision and can be viewed in the Events area (note – access controlled via User Access Options)



Re-import feature

Once you have imported your Event to Gold-Vision, your Event will automatically update from Eventbrite until it is complete. Any new Bookings will automatically be imported in Gold-Vision.

In case you notice some data is being missed by the automatic import (for example due to an internet connection failure), it may be necessary to re-import the Event, by clicking the re-import button in the administration console.



Custom Alerting

Upon request, we can set up alerting for new Contacts and/or Bookings in Gold-Vision.
Please contact your Gold-Vision Account Manager for more information.

Discounts

In case you apply any discounts in Eventbrite, Gold-Vision will show the discounted price in the Session Product.

Eventbrite FAQ & Troubleshooting

What happens when an attendee cancels their booking?

Depending on the settings in the Gold-Vision admin console, the booking will either be deleted in Gold-Vision, or set to “Confirmed?” - “No”. Please see your System Administrator for more information.

When a Booking is deleted, the product sales are also deleted.

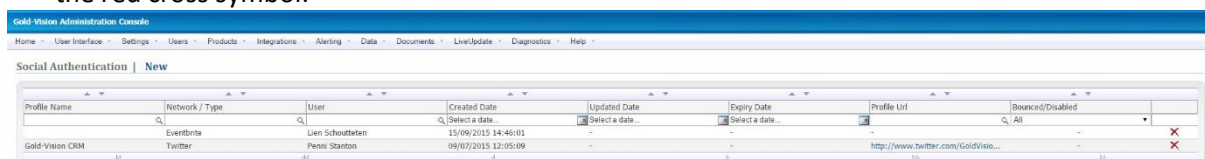
How do I disconnect the Eventbrite integration for a user?

Disconnecting the integration must be done both in Gold-Vision and in Eventbrite.

1. In the Gold-Vision Admin Console, go to **Settings**, and select **Social Authentication**.



2. Here, you can disable the Social Authentication for the user you wish to disconnect by clicking the red cross symbol.



3. Next, go to the Eventbrite website, select your user menu and go to **Settings**.
4. In the side menu under **Contact Info**, select **Extensions**.


- Settings ^

- Contact Info
- Password
- Social Settings
- Credit/Debit Cards
- Email Preferences
- Unused Venues & Organizers
- Multi-User Access
- Extensions
- Close Account

5. Here, you can disconnect by selecting the trash can symbol. This will stop Gold-Vision from fetching any new data from Eventbrite. Any completed Events linked with this user will remain in Gold-Vision.

Extension Management

You've authorized these extensions to access your Eventbrite account.

EXTENSION NAME	DESCRIPTION	INSTALLED	ACTIONS
Gold-Vision Eventbrite Integration	Integrates Eventbrite with Gold-Vision; a CRM solution.	1 month ago	

I can't see my Events in Gold-Vision.

Please go through this checklist first:

- Have you enabled the integration?
- Have you restarted the Data Transfer Service?
- Has your account authenticated successfully?
- Have you waited 10-15 minutes for the integration to take place?
- Have you checked if the import was successful? Go to the Admin Console, **Integration – Jobs** to see if the import was successful. If this is not the case, there may be a firewall problem.

If you still can't see your Events in Gold-Vision, please contact Support.

My Event has imported but I can't see the Sessions/Tickets.

- The Event is imported initially, then on the next 'poll' the Sessions/Tickets and Bookings will be imported. 'Polls' happen automatically every 10-15 minutes.

If you still can't see your Sessions/Tickets, please contact Support.

I can see a confirmed order in Eventbrite, but no booking in Gold-Vision.

- Have you waited 10-15 minutes for the automatic 'poll' to import the data?
- Did your internet connection fail recently? If so, the data will be picked up with the next 'poll'.
- Have you added attendees both via Eventbrite and in Gold-Vision? If so, your Event may be fully booked. Please check with the Event Owner, they will have received a Gold-Vision Alert.

If you still can't see your Bookings, please contact Support.