How to create and use a Contact Store

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An EventsAir Contact Store lets you create a centralized contact database or CRM database across many events. This may include all events, or you may have multiple Contact Stores to service different categories of events. You can use the Contact Store to generate invitations to events and track attendance across multiple events.

Examples of how to use a Contact Store

Example One – Corporate Sales Team

Let's say you have team of more than 200 salespeople. Your EventsAir Contact Store can help you:

- Maintain a list of all salespeople.
- Keep notes on communications you have with each salesperson.
- Keep profile data (Marketing Tags) such as start of employment date, sales region, and training certifications.
- Invite all or certain categories of salespeople to training events throughout the year. You can generate invitations directly from within the Contact Store and include auto-login tokens so that the registration form for the training event is pre-filled with that person's details.

After each training event, data is uploaded back to the Contact Store, including any additions to Marketing Tags and Notes. A record of event attendance is also stored.

Example Two – Association Membership

You work for an association with over 1000 members. Using the EventsAir Contact Store, you can:

- Maintain a list of all members.
- Keep notes on communications you have with each member.
- Keep profile data (Marketing Tags) such as membership level, date joined association, and much more.
- Invite the members to various association meetings throughout the year. Invitations are generated directly from within the Contact Store. Auto-login token links will take each member to a pre-populated registration form for the meeting.

After each meeting, data is uploaded back to the Contact Store, including any additions to Marketing Tags and Notes. A record of event attendance is also stored.

Read more about Membership Management here.

Important concepts

- A Contact Store can be used to invite contacts to new events, and to track the history of events attended.

- You can create multiple separate Contact Stores containing different contact records (for example, one for sales contacts, one for vendor contacts).
- One Contact Store can be connected to many events, however **each EventsAir event can be connected to just ONE Contact Store.**
- An event is linked to one Contact Store when setting up the event (you can also connect this at a later date). However once you set the Contact Store in Event Setup, it cannot be changed, so be sure to select the correct one.

What does a Contact Store look like?
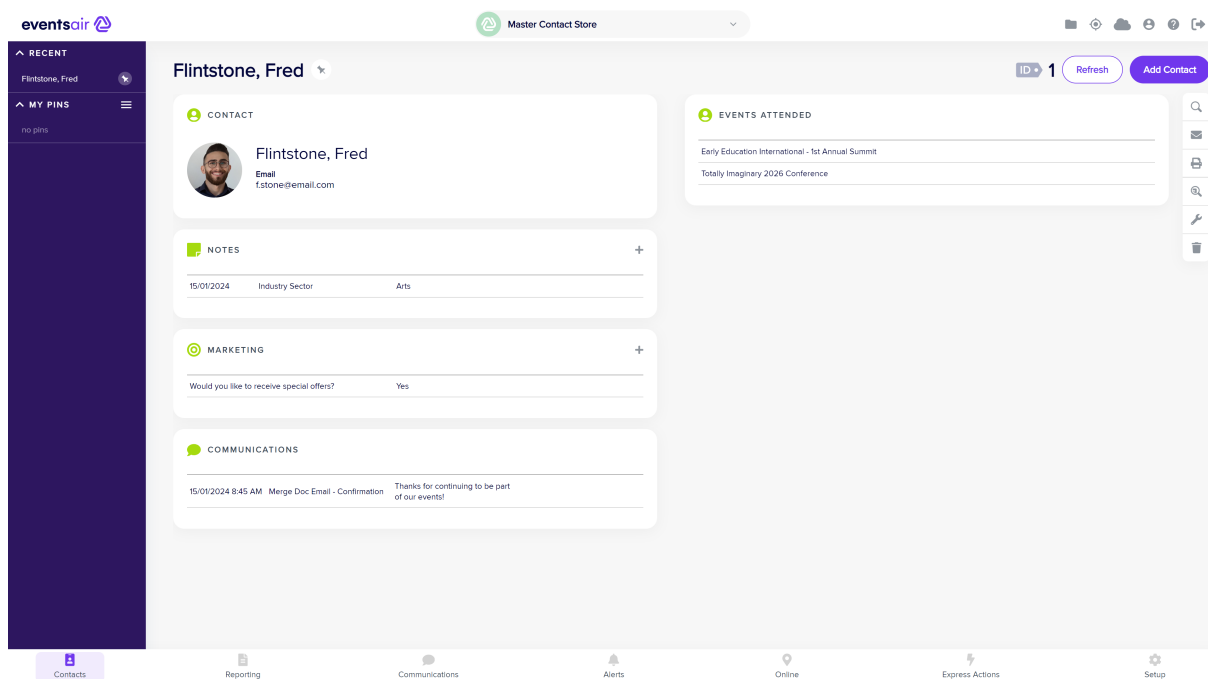
A Contact Store is similar to a normal EventsAir event, but with streamlined functionality; it maintains an ongoing list of contacts, communicates with them, and keeps a history of attendance across multiple events / meetings.

- **Modules** – the only modules available in the Contact Store are:
  - Contacts
  - Notes
  - Marketing
  - Communications

- **Panels** – the only panels available in the EventsAir Contact Store are:
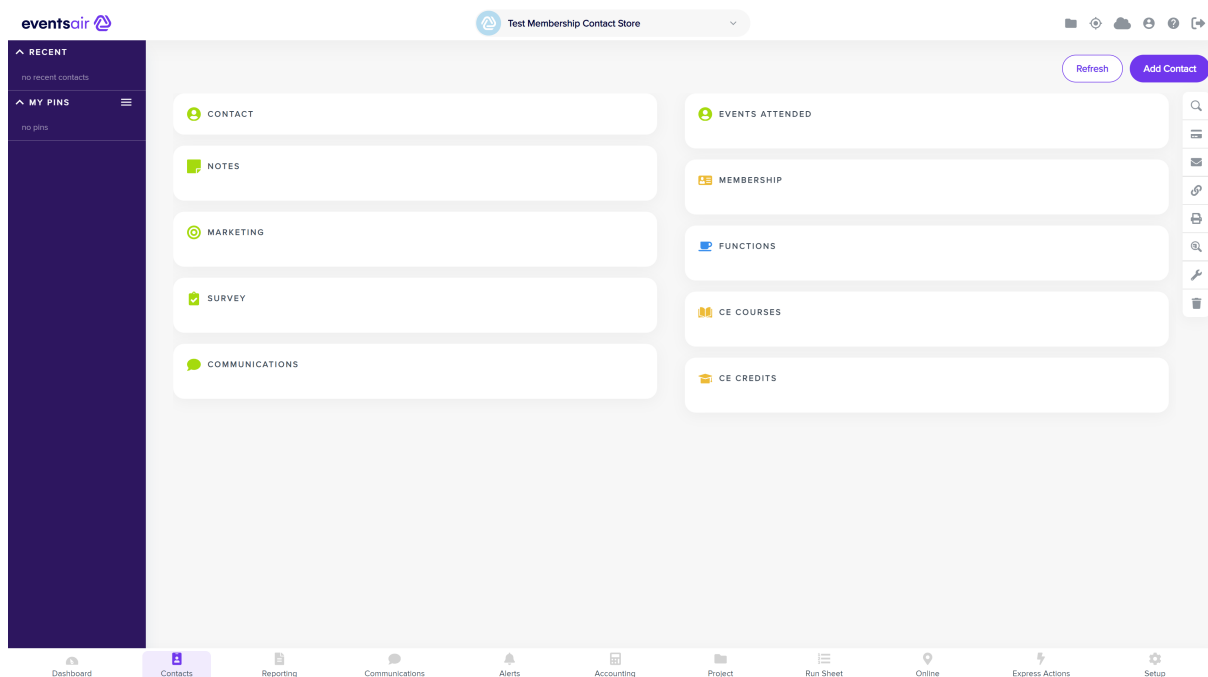 - Contacts
  - Reporting
  - Communications

- Alerts

- Online

- Express Actions

- Setup

CE Contact Store

You also have the option of creating a CE Contact Store instead of a regular Contact Store. A CE Contact Store has all the features of a regular Contact Store, and can hold all information about Continuing Education course registrations, including financial information.

Set up a Contact Store

Creating an EventsAir Contact Store is exactly the same as creating a normal EventsAir event, except that you select Contact Store (or CE Contact Store) as the Event Type. Once created, instead of the Dashboard as your initial view, it will be the Contacts Panel:

Build a contact store (adding records/contacts)

When you first create your Contact Store, you need to add contact records. You can do this in a number of ways. For example, you could:

- Create an interactive (registration) site to collect submissions from people interested in attending a future conference or event. This pool of interested contacts can be held in the Contact Store; it can be accessed for future marketing efforts, and can be used to populate the registration details of the actual event.

- Import a list of employees within a specific division, such as Sales or Technical Support. You'd use this pool of contacts to make future registrations at a sales training much faster. This would also automatically maintain a history of attendance for each salesperson at your company, across all future events.
- Update the Contact Store with new contact records. When you create a new event, you may have new registrations as well as linked contacts from the Contact Store. At the conclusion of an event, if you collected new registration data, all new contact records can be uploaded back to the Contact Store, creating new contact records.

Connect a Contact Store to an event

You need to select your Contact Store as part of the event set up process. You can do this when you first create the event, or you do it later — **but once it's done, it can't be changed.**

To add a contact store after the event has been created, navigate to the Setup Panel.

Under Event Preferences, look for the Contact Store dropdown.

(Note: your Contact Store must be accessible from the same Office in EventsAir as your event.)

Contact Store processes

You'll use a Contact Store as part of three processes:

- **Importing** Contact Store records into a local event
- **Inviting Contact Store contacts** to register for events, or to install mobile apps on their device
- **Updating the Contact Store** with the list of attendees from a recently concluded event

Marketing Tags, Note Types & Custom Fields for Contact Stores

When setting up a Contact Store, you need to put some thought into how you set up your Marketing Tags, Note Types & Custom Fields.

Contact Store Marketing Tags, Note Types & Custom Fields should be used for data that's permanent for that contact and applies to a contact across all events. For example:

- Date of Birth
- Allergies

Local Event Marketing Tags, Note Types & Custom Fields (in your local/child event) should be used to store data that's only relevant to the local event. For example:

- How did they hear about this event?
- Special Requests (seating, etc.)

When you link an event to a specific Contact Store, you'll see all Marketing Tags, Note Tags, and Custom Fields included in the Contact Store.

You'll know they're linked to the Contact Store because the data block will be gray instead of green, and the data block title will be appended with the name of the Contact Store:

📝 NOTES	+

|	
📝 NOTES: MASTER CONTACT STORE	+
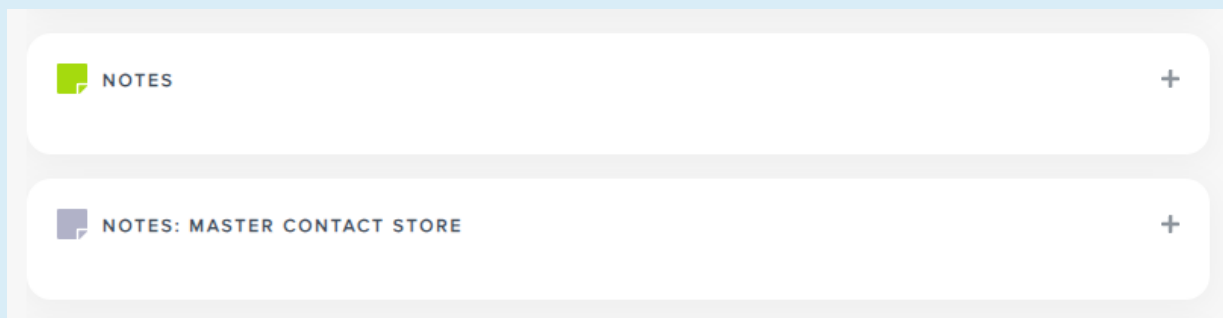
In this example:

- The first Notes data block is for notes specific to the local event.
- The second Notes data block is for notes that originated in the Contact Store.

Import Contact Store records into your local event

After you've connected a contact store to an event, to search records and import them into your current event, follow these steps:

1. Click on **Attendees** in the EventsAir Navigation Bar.
2. Click on the **Search** Action Button.
3. In the lower left corner of the screen, select your **Contact Store** from the drop-down list of available databases.
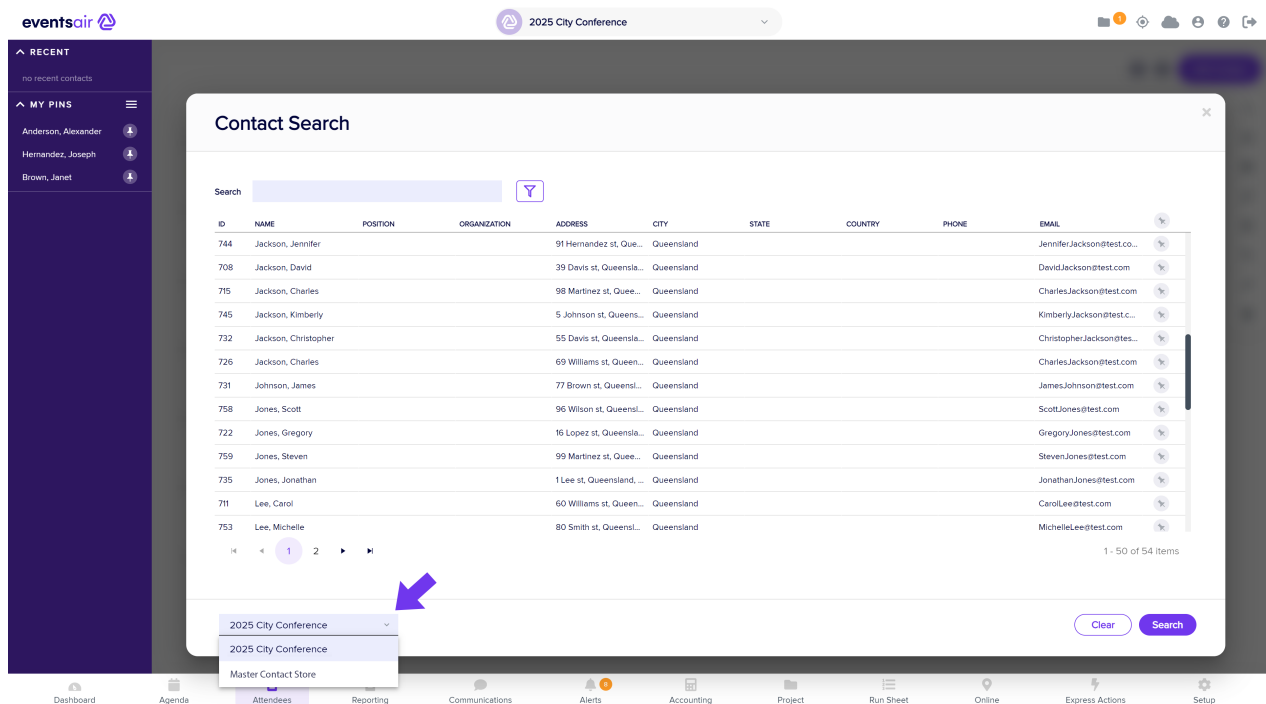
4. The **Open** button will change to say **Add,** and a column of checkboxes will appear to the left of the names.

5. Enter any other needed search criteria.

6. Select **Search.** The list of records returned will be from your Contact Store.

7. Select the people you want by ticking the checkboxes, then pressing **Add.**

Tip: Clicking the checkbox in the heading will tick *all* checkboxes for you.

8. The selected contacts will be copied to your local event as linked contacts.

Invite Contact Store contacts

This feature can be used for newsletters, updates, and other communications, as well as links to register for an event, complete a survey, or encourage installation of an attendee app for an upcoming event.

Just like a standard event, you can insert a link to a specific interactive (registration) site, app, or survey. You can include an Auto Login Token, which will pre-populate a registration form with the contact's information.

You can also **select** which event you want to send an invitation for, **then select** which interactive (registration) site, survey, or app link(s) you want to send.
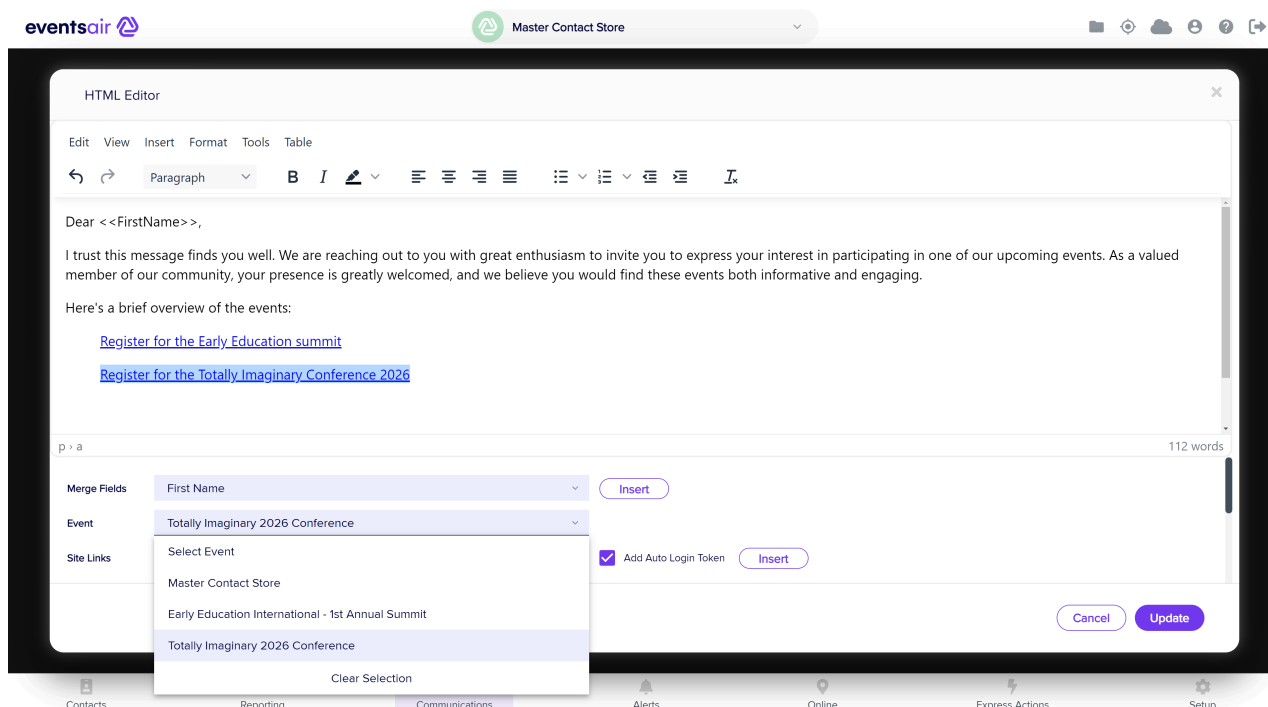
Update a Contact Store after an event

At the end of an event, run the Express Action to update the Contact Store.

- This creates a record of attendance for the event in each attendee's record.
- Any NEW registrations in the local event will also be updated to the Contact Store as new contact records.
- Any shared Marketing Tags, Notes, or Custom Fields that were updated in the local event will be updated for new attendees will be added to the corresponding fields in the Contact Store.

Contact Store Marketing Tags, Notes, or Custom Fields for people who were *already linked* to the Contact Store will already have updated.

Note: Only Marketing Tags, Notes or Custom Fields that are also part of the Contact Store will update, not those that are only part of the local event.

To update your Contact Store, follow these steps:

1. Open the **Update Contact Store** Express Action.
2. **Filter** (Target Group) for the attendees you want to update. Typically this will be everyone. However, you may need to filter out staff, or other attendees that you don't want to appear in the Contact Store.
3. If needed, you can assign a Contact Store **Marketing Tag** to each contact record during the import. This can be useful as a way to categorize or group this latest import for future reporting or filtering.
4. Select **Create** to update the Contact Store.

See Event Attendance history

Once you start collecting a history of attendance at prior events, you can click on a specific event in the Contact Store and EventsAir will immediately jump to that event and display the contact record for the attendee in question.