

# How to Create a Marketing Event

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## Description

Use this function in the Marketing Events tab to allow you to plan, record, and manage sales, resident lifestyle, or marketing events as part of your sales efforts.

## Step by Step


- 1** Navigate to the Marketing Events tab
- 2** Click **New**
- 3** Enter the **Marketing Event Name**
- 4** Specify your **Community**
- 5** Select the **Type** of event
- 6** Enter the **Event Date**
- 7** Specify a **Marketing Plan** if you have one preset
- 8** Enter the **Budget**
- 9** Enter the **Target Number of Visitors** for the event
- 10** You may also select an **Audience**
- 11** If the event is being coordinated by a third party, specify an **Account** and **Contact** as your main point of contact in organizing the event. They should already be entered in the system for your outreach partners.
- 12** Select the **Analysis Category** to specify whether the event is *Onsite*, *Offsite*, or a *Trade Show*.
- 13** Select the **Ranking**
- 14** Click **Save**

Marketing Event  
**Mother's Day**

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[Open Activities \(4\)](#) | [Activity History \(1\)](#) | [Notes & Attachments \(0\)](#) | [Attendees \(7\)](#) | [Prospects \(40+\)](#)

**Marketing Event Detail**    [Edit](#)   [Delete](#)   [Clone](#)   [Submit for Approval](#)   [Import](#)

Marketing Event Name	Mother's Day	Owner	 <a href="#">Larry Wieskopf [Change]</a>
Community	<a href="#">iaRetirement - GTA</a>	Event Date	2/2/2012
Type	Marketing, Resident Lifestyle		

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**▼ Planning**

Marketing Plan	<a href="#">Monthly Community Outreach</a>	Audience	Prospect, Resident
Budget	\$800.00		
Target No. of Visitors	50		

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**▼ Offsite Event Information**

Account	
Contact	

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**▼ Marketing Analytics**

Analysis Category	Onsite
Ranking	A - Top 10%

## Related Lists

**Open Activities** – Use this list to create new tasks to help plan and manage the event.

**Activity History** – This list displays all completed tasks, logged phone calls, expired events, and emails for the event.

**Notes and Attachments** – Use this section to attach any documentation or notes having to do with the event.

**Attendees** – This is a list of people expected to attend the event.

**New Prospects** – Use this section to upload the names and related information for new prospects who may be interested in your community as a result of the marketing event.

**Open Activities** New Task New Event Open Activities Help ?

Action	Subject	Name	Task	Due Date	Status	Priority	Assigned To
<a href="#">Edit</a>   <a href="#">Cls</a>	<a href="#">Prepare Menu</a>		✓	4/1/2013	Not Started	Normal	<a href="#">Larry Wieskopf</a>
<a href="#">Edit</a>   <a href="#">Cls</a>	<a href="#">Order Room Decorations</a>		✓	5/7/2013	Not Started	Normal	<a href="#">Larry Wieskopf</a>
<a href="#">Edit</a>   <a href="#">Cls</a>	<a href="#">Work with Resident Ambassador's on planning</a>		✓	5/7/2013	Not Started	Normal	<a href="#">Larry Wieskopf</a>
<a href="#">Edit</a>   <a href="#">Cls</a>	<a href="#">Prepare Muffins for Event (20)</a>		✓	6/23/2013	Not Started	Normal	<a href="#">Frank Leung</a>

**Activity History** Log A Call Mail Merge Send an Email View All Activity History Help ?

Action	Subject	Name	Task	Due Date	Assigned To	Last Modified Date/Time
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Review last year's event and plan</a>		<input type="checkbox"/>	2/2/2012 2:00 PM	<a href="#">Larry Wieskopf</a>	4/8/2013 1:34 PM

**Notes & Attachments** New Note Attach File Notes & Attachments Help ?

No records to display

**Attendees** New Marketing Events Attended Attendees Help ?

Action	Audit No.	Prospect	Contact	Resident Name	Resident	Prospect Attended - PL
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">MEA-1000000</a>			Dr. John Adams	<a href="#">R-10081</a>	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">MEA-1000001</a>		Julie Adams			
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">MEA-1000002</a>	Swanson, Albert (Albert & June)				
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">MEA-1000004</a>	Smith, Bill (Bill Smith)				
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">MEA-1000005</a>	Whithorne, Walt (Walt & Judith)				
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">MEA-1000009</a>	Swanson, Albert (Albert & June)				
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">MEA-1000012</a>	Lazer, Boris (William Lazer)				

**Prospects** New Prospect Prospects Help ?

Action	Name
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Downing, Ronald (Ronald Downing)</a>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Down, Robert (Robert &amp; Judy)</a>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Swanson, Albert (Albert &amp; June)</a>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Thompson, John (John &amp; Jill)</a>
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Williams, Barb (Bob &amp; Barbara)</a>