Getting Started with Constant Contact® Event Marketing





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About this Guide

This guide provides an overview of the Constant Contact ® Event Marketing product. We'll show you how-to promote, capture, and track online RSVPs and registrations for your events.

Getting Help

No matter where you are within Constant Contact Event Marketing, you can quickly get help the way you need it:

- Click the Get Help link in the upper right hand corner of the page to open the Resource Center
- Click the question mark icon, (³), for context specific help.
- ullet Click the more information icon, (lacksquare), to open a topic-specific help window
- Click the tutorial icon, (🏥), to view an interactive tutorial on a specific feature.

Note

This manual only describes Constant Contact Event Marketing.

Constant Contact® Event Marketing at a Glance

Constant Contact Event Marketing is a product by Constant Contact designed to help you create, promote, capture, and track your events. There are four components in the creation of an event:

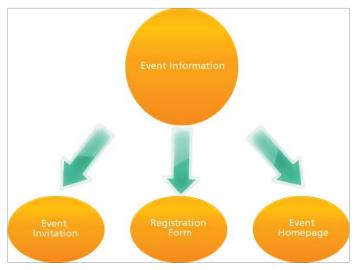
- Event Information
- The Event Invitation
- The Event Registration Form
- The Event Homepage

Once you enter Event information, you can create the invitation, edit a registration form and create an event homepage. While none of these steps are required, each of them provides useful tools to help you meet your goals of creating, publicizing, and holding a successful event.

	_		Τ .
Create	Event Information	0 Oct 9 2009 9 0 Su Mo Tu We Th Fr Sa 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 36 19 20 21 22 23 25 26 27 28 29 30 31	The first step in creating an event. Here you enter information such as the event name, place and time, as well as one or more fee types if necessary. This information will be automatically included in the email invitation, registrations and event homepage.
Promote	The Event Invitation		Here you can create an invitation and customize the look with your branding, colors and images in a process very similar to Constant Contact Email Marketing You can then send the event invitation out to specific contact lists you use within constant contact.
	The Event Homepage	Miles and a second	With the Event Homepage, you can create and manage a Constant Contact web page to promote your event. The homepage can be used to highlight what makes your event special as well as provide links and one-click access to the registration form. The homepage can be customized with a theme of your choice. This selected theme will match the look of your registration form and present a seamless and unified look for your event registrants.
Capture	The Event Registration Form	First: East: East:	The event registration form allows invitees to accept and submit their registration online and directly to your Constant Contact account. The registration form can contain contact information as well as specific requests and other information to help you give your attendees a great event experience. The registration page can also be customized with a look or "theme" that matches the Event Homepage.
Track	Event Reports	Fast: Esset:	You can use the event details page to view a dashboard of incoming registrations as well as reports. You can also monitor who has registered, who has submitted payment, how close you are to capacity and more.

Creating Your Event Information

The first step in Constant Contact Event Marketing is to create the event information. This involves entering the event time, location, and other event details. This information will become a central part of your event invitation, registration form and event homepage. The invitation should contain all of the relevant details about the event such as the name, time, and place. Event Marketing provides a step by step process to help you fill out all of the essential information.



Event Information that you enter into Event Marketing is used for the invitation, registration form and event homepage.

To Create Event Information:

- 1. Log into your account and click the **Events** tab.
- 2. Click Create Event from the sub-menu.
- 3. Enter event information. See the tables below for specific information on what you need to enter.
- 4. Click the Create Event! button.

Event Entry Information

Event information what will your event be called?

Entry Field	Example	Notes
Event Filename*	Invite for CTCT Food	This is for your records. Your invitees will not see this
	Fest	title
Description (optional)	CTCT Spa and	Invitees will see this at the top of the invitation, many
	Fitness Fine Food	other components of Event Marketing such as the
	Event	event homepage and registration page.

Event Timing: When is your event?

Entry Field	Example	Notes
Start date and time*	10/24/2009 7:00	Make sure you've selected the correct designation for am/pm.
End date and time*	10/24/2009 11:00	Make sure you've selected the correct designation for am/pm.
Show this information on the registration form	(selected)	

Event Location: Where is your event?

Entry Field	Example	Notes
Location / Venue*	CTCT Spa and	Enter a location or click use my organization ad-
	Fitness	dress.
		Be sure to include a different location from your
		organization if the event will be held "off-site".
Address 1	123 South Street	
Address 2,3		
City	Anytown	
State/Prov	MD	
Country	USA	
Postal Code	01234	Zip or other necessary mail code.
Show this information on	(selected)	
the registration form	(Screeted)	

Note: Use of a valid address will allow for the registrants to view a map of the address.

Contact Information : Who is the event contact?

Entry Field	Example	Notes
Name*	Joe Jacobson	This person is the point of contact for your event so
		make sure this person is prepared to correspond
		with potential registrants.
Email Address	joe@ctctfit.com	Select if you want email address displayed. This
		address must be a verified email address within your
		account.
Phone	111.222.3333	
Organization	CTCT Spa and	
	Fitness	
Show this information of	~	
the registration form	(selected)	

Can Registrants bring Guests?: Is there a fee to attend your event?

Entry Field	Example	Notes
No - Only the registrant can attend		
Yes - A registrant can bring others		If selected, choose number of guests from drop- down menu.

Payment Information: Is there a fee to attend your event?

Entry Field	Example	Notes
No - there is no charge		
Yes - there is a fee		
(If yes there is a fee)		
Label	Member / Non Member	You can have more than one fee type for a given event. Just click • Add another fee . Make sure that you label each fee type. (For example, member/nonmember).
Add Another Fee	Senior Discount	Click this button to add another fee type. You can have an unlimited number of fee types.
Early Price (Until)	Event price until date (Jan 10, 2010)	Use this option if you want to promote your event with early registration or "early bird" rate.
Late Price (After)	Event price after	You can also use this option to encourage early registrations.
Dollar Amount	\$20.00	
Payment Options		
Credit Card Payment via Paypal Standard Checkout Check	Credit Card via PayPal Standard Check Out	You will need a PayPal Premier or Business account in order to facilitate online payment via credit card. Click Need a PayPal account? for more information.
At the Door		

Event Limits: Do you want your registration to close automatically?

Entry Field	Example	Notes
At a maximum number of	50	Registrations will close after the limit has been met.
registrants		
At a certain date	10/10/2009	Registrations will close on the date specified.

Event Type: What type of event is this?

Entry Field	Example	Notes
Event Type*	Food / Wine	This information helps Constant Contact know what kind of events you hold. This will help us develop our product to best serve your needs.

Additional options: Allow registrants to print tickets

Entry Field	Example	Notes
Allow registrants to print		When checked, registrants will get a link in their reg-
tickets		istration will get a link in their registration confirma-
		tion page. Each registrant or guest's name is printed
		on the ticket.



Example of required as well as optional event information as viewed on the Event Details page of your Event Marketing account.

Guidelines for Creating an Event:

General Information: Your event information needs to be accurate and informative. For example the Event Title is what your invitees will see so avoid abbreviations and check your spelling.

Event Timing: The event date and time also needs to be accurate. If you live in an area with multiple time zones, make sure to make the correct time zone designation. It's recommended to select the Show Information box so that invitees can view this information when considering whether or not to accept your invitation.

Event Location: The inclusion of an interactive map is a great feature to use with your event so be sure to include a valid address.

Guest Registration: An invitee can register guests on his or her behalf. This feature allows a registrant to indicate how many people are coming to the event as well as how to handle payments.

Note:

If you are collecting payments for your event, you have the ability to set your pricing to accommodate your guests. For example you can set your pricing so that the primary registrant gets a member discount while a guest does not.

Contact Person: Determine what this contact person will do so he or she is prepared to handle correspondence. Will this person collect payment? Answer questions, handle RSVPs?

Event Payment:

You can take advantage of Event Marketing's flexibility to offer multiple fee types depending on certain criteria such as a price for a member or non member. You can even specify fees that are time based. For example you an schedule an event which is \$20.00 for members, \$30.00 for non members with a five dollar discount for early registrants. Be sure to check out the tutorial on multiple fee types for more information.

If payments are to be received by credit card, you must obtain a Premier or Business PayPal account. It's easy to set up an account. Refer to our tutorial on how to use PayPal with your events for more information.

Copying your Event:

As a time saver, you can copy your events for reuse.

To Copy Your Event:

- 1. Click the events tab to view a list of your existing events.
- 2. Click the copy icon next to the event you want to copy.
- 3. Enter a new file name for the newly copied event. This is the name that will be displayed within your Constant Contact account. You will still need to change the name of the event as it appears to your invitees.
- 4. Click Copy this Event once you are satisfied with the new file name.

You will then see the name of the newly copied event in your list of existing events. Review the event details to see what was copied.

Make sure you update both the registration form and event homepage where necessary.

Note: The event prices as well as early and late registrations were not copied. Additionally, the date of the event will have to be updated if the original event occurred in the past.

Creating an Event Invitation

Now that the details of the event are established, (Who, when where, etc) It's time to create an invitation for your event. The good news is that you've already done a lot of this work when you created and planned the event. The event invitation is what will appear in your invitee's email inbox. As you compose your invitation, be sure that the information is accurate and that it is presented in a way that will be received and read by your audience.

To Compose Your Invitation:

- 1. From your event details page click Create Invitation(s)
 - The Email Message Settings Page appears
- 2. Complete all of the required fields as well as the optional ones that you feel will enrich your invitation.
- 3. Once you are satisfied with the email settings, click Next.
 - You will receive a message if any information is missing or incorrect.

You should now see the Edit Email Layout Screen. For users of Constant Contact Email Marketing, this will look familiar. The Email is broken into different editable areas or "blocks". Within each block, you have the ability to:

Note:

Even though many of the fields such as the subject line and invitation email name already have content, it's a good idea to enter text that is accurate and appropriate for your invitation. For example, enter in a subject line such as "Announcing our Fall Event. We hope you can join us!"



Edit a block



Copy a block



Delete a block

The Invitation Details:

Although there is content already within the email you will need to edit the invitation to match the details.

Here's an example of some content added for an event.

Dear (Contact First Name),

We've partnered up with some of the best local organic chefs and restaurateurs. Come join us for a very special night including:

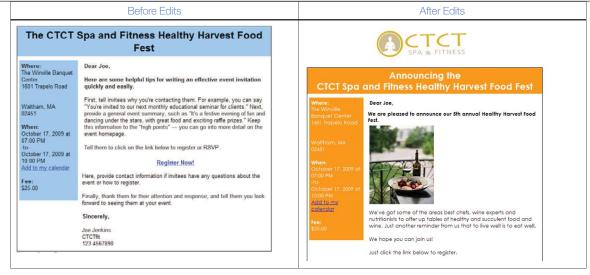
- Your choice from a cornucopia of hearty, healthy, and delicious food.
- Wine Tasting courtesy of Drinkington's Fine Wine and Liquors
- Nutrition and Exercise Personality Linda Liveright will speak on eating, and living well.

Tickets are \$20.00 for Members and \$30.00 for Non-Members.

Register before December 20th and get \$5.00 off of each ticket!

We hope to see you there!

You should also take the opportunity to add your organization's logo to the top of the invitation. Additionally you can also change the colors, add images and more. Consider the before and after graphic below. Note the difference. For more information on how to edit the email go to the Constant Contact Learning Center and view our FAQs or additional tutorials.



Once you are satisfied with your invitation, click Save or Save and Continue.

Sending the Event Invitation:

Note:

You will not be able to schedule your event for sending until your event is published. Once you've finalized the invitation and published the event, you are ready to send out the invitation. The process for sending an event invitation is very similar to sending an email through Constant Contact Email Marketing or a survey invitation with Constant Contact Survey.

To Send the Invitation

- 1. Click **Select Lists** on the Email details page.
- 2. Select the list or lists to which you want to send your event invitation.
- 3. Click Save.
 - -If your event has not been published...
 - Your invitation email will be saved as a draft,
 - -If your event has been published...
 - You will be asked to assign a list and schedule your email to be sent.
- 4. Click Schedule Email
- 5. Click one of the following to designate when your email will be sent.
 - Draft (This will keep your email invitation status as unsent.
 - **Send Now** (It may take up to 60 minutes for the email to be sent)
 - Schedule for: Date/ Time
- 6. Click Finish

Helpful Hint: Constant Contact has many resources on list management and managing contacts. For more information be sure to check out our tutorials and FAQs located in our learning center. Just click **Get Help** in the top right hand corner of the page.

Copying your Event Invitation:

In the event that you want to send out another invitation for the same event, you can conveniently copy your invitation.

To Copy Your Event Invitation:

- 1. Access your event and view your invitations.
- 2. Select the invitation you want to copy.
- 3. Click the Copy icon.



- 4. View your copied invitation.
- 5. Make the necessary changes to your invitation.

Note:

You will have to select a new mailing list for your copied invitation as the selected recipients from the original were not copied over.

Editing the Registration Form

An online registration form is automatically created for you when you create an event. By default, the first name, last name and email address are included with the registration form.

You can edit the registration form to add additional questions to find out more about your registrants. These questions might include contact information such as a mailing address and phone number or any special needs they might have while at the event (dietary preferences or medical conditions), or what names do they want on their badge. You can also create a distinct look for your registration form by selecting a custom theme to match your event. This theme will also be carried over to your Event Homepage should you decide to create one.



These are the fields that your invitees see if you do not edit or add fields to the registration form.

To Select a theme for the **Registration Page**:

- On the Event Details page, locate the registration form icon on the right-hand side of the page and click Edit

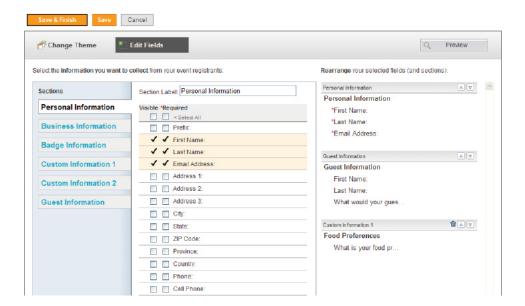
 Form
- 2. Click **Change Theme** at the top of the form editor.
- 3. Available themes will display as thumbnails across the top of the page.
- 4. Scroll across the themes and select the one you want to use.
- 5. The look of the registration page will automatically update to the selected theme.
- 6. Click Save and then Edit Fields.

Note:

Your selected theme will not display when you are editing the fields of your registration form.

To Edit the Registration Page:

- On the Event Details page, locate the registration form icon on the right-hand side of the page and click Edit Form.
 - The Edit Registration Screen will appear.
- 2. Select the fields you want to include by clicking the corresponding check-box under the Visible column.
- To make a field required, click Required.
 - The selected fields; with or without the required designation will appear in the Selected Fields column in the right-hand portion of the page.



On the edit page is a list of possible registration questions or "fields" listed vertically at the center of the page. These fields are listed by category as specified on the left-hand portion of the page. By default the screen shows Personal Information displaying. Notice that the first and last name as well as the email address are already selected. At any time you can click the Preview button to see what your registration page looks like.

- 4. Click **Business Information** to add additional fields if you feel they are required.
- 5. Click **Badge Information** if you need information for name tags or something similar at the event.

You may edit the registration form after the event is published or "goes live." If you do choose this option, you must close the registration. After you make your changes, you can reopen the registration.

Helpful Hint: While getting the information you need is an important part of the registration form, be careful not to make the form too long or complicated. A time consuming registration process could be a disincentive for someone who otherwise may want to register.

Custom Information:

The Custom Information fields are important if you need information for a specific event. For example if your event will serve food, you may want to include questions about food preferences or allergies. You can have up to two sections of custom information with up to ten fields for each section.

To Add a Custom Field:

- 1. Click Custom Information 1 among the list of sections on the left-hand potion of the screen.
- 2. In the middle of the screen enter a section label that reflects the type of information for which you are asking; for example "Food Preferences"
- 3. Click Modify on the Custom 1 line.
 - A question editor appears.
- 4. Select a field type for your question. You have your choice of the following field types.

- Short Answer
- Long Answer (This will allow the respondent to answer with up to 500 characters).
- Date (This will allow the respondent to enter a date using a calender).
- Information text (This displays static text for your respondents to read).

Click **Custom Information 2** if you need to add an additional category of information.

Available Personal and Business Entry Fields for Event Information

Personal Information	Business Information
Prefix	Company
First Name	Job Title
Last Name	Department
Address 1	Address 1
Address 2	Address 2
Address 3	Address 3
City	City
State	State
Zip Code	Zip Code
Province	Province
Country	Country
Phone	Phone
Cell Phone	Fax
	Website
	Blog

Adding Guest Registrations

If you set up the event to allow guest registrations, you have the ability to ask customized questions similar to the way questions are asked to the primary registrant. For example, if your event will be catered, you an ask about food preferences for each of the guests.

Once you are done selecting the fields for the registration click **Save** and **Close** to make your changes complete. You can then view a preview of the registration form by clicking **Preview** in the **Registration Form** section of the **Event Details Page**. Your next step is to edit the Confirmation Messaging

Editing the Confirmation Message

The **Confirmation Message** is what your registrants will see after they submit the event registration. While information has already been entered it is important to edit this content so that it matches up with your event. There are two different Confirmation messages: The **Confirmation Page** and the **Confirmation Email**. In addition to the text specified here, both the confirmation page as well as confirmation email will include the title, location and date/time of the event.

- The Confirmation Page is what the invitee sees upon submitting their registration.
- The Confirmation Email is an email that registrants will receive as a confirmation of their registration.

Creating the Event Homepage

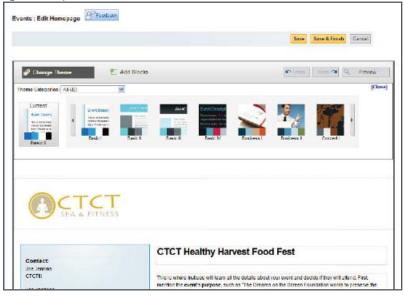
Event Marketing provides you with the opportunity to publicize your event with the Event Homepage. The homepage is easy to create and edit. Once it's complete your can link it to your event invitation, registration page or even your own website.

About the Homepage:

Even though the homepage has information about your event, there is a host of editing features at your disposal for customization. You can:

- Select a custom look or theme for your homepage. With just one click, this selected theme will also appear on your registration form.
- Add additional information about your event.
- Include pictures of the facility or other helpful images
- Include links to other web sites, places to stay, supplemental information etc.

This feature is available for events that are either in draft or are active. You will not be able to create an event homepage for complete or canceled events.



A theme can be selected by clicking on any of the images in the horizontal scroll bar at the top of the page

To Edit the Event Homepage:

- 1. Access the homepage, on the Event Details page, under Event Homepage, click Edit Homepage.
- 2. Use the editing environment of the web page editor to
 - Edit and move text blocks
 - Change the look or "theme" of the event homepage
 - Add images
 - Insert links to external web sites.

- 3. At any time you can click **Save** to retain your changes.
- 4. Click **Preview** to view your changes then make additional edits if necessary.
- 5. When you are satisfied with your changes, click **Save & Finish**.

Visibility of the Event Homepage

By default the event homepage will be a part of the registration process If you want, you have the option of excluding this from the registration.

To Exclude the Event Homepage in the Registration Process

On the **Event Details** page under **Event Homepage**. You will see a note telling you that the home page is "included in the registration path"

- 1. Click **Change** if the Homepage is currently not included in the registration path.
- 2. Select "No Your visitors go directly to the Registration Form."



The Event URL:

Because the homepage is a live webpage it uses the "Event URL." This URL becomes available once the Event is published. You can copy this URL and paste it into another website, a blog, or a social networking site such as Facebook or Twitter.



Publishing your Event:

After you have entered your event information, you can publish your event. "Publishing" means that your event information can be viewed by others depending on how you want to publicize it. When you publish your account you will see an event URL appear on the event details page. You can copy this URL to another website, blog or social networking site.

Once an event is published, the event information cannot be changed with the exception of the registration close date and seat limit. Therefore it is important that you first test what your registrants will see. To preview what your event information looks like, click the **Test what registrants will see** link.

Helpful Hint: You should note that while you can publish at anytime. It's recommended that you first create an invitation, edit your registration form and create an event home page, all before you publish. That way all of the pieces you need to promote and manage your event are in place when you publish the event. Once you publish you will still be able to edit your event information, invitation and event homepage. You can also create additional invitations.

To Publish Your Event:

All you need to do is click the **Publish This Event** button on the **Event Details Page.**

Publish This Event

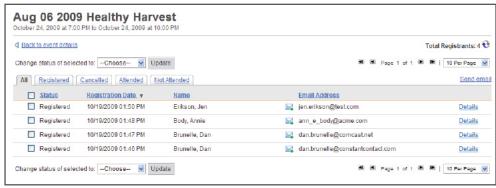
Managing Your Event- Handling Registrations

Once event invitations are sent, responses will be sent in by your attendees when they submit their registration. Constant Contact Event Marketing will automatically display these changes. You can view the progress of your event registrations in the **Event Tracking** and **Event Reporting** section of the **Event Details** page. From these sections of the Event Details page you can view the number of current registrants as well as the amount of payments that have been received. There are also graphic representations of how the event is to the registration close dates as well the seat level.



To View Registration Information

- 1. Click either the number next to **Registered** or the **See more** link.
- The Manage Registrations page will appear.
- On the Manage Registrations Page you can who registered on what day as well as his or her contact information.



- 3. You can view more specific information according to registration status if you click the tabs above the list.
- 4. Click **Details** next to each name to find out more about each registrant.

Status Type	What the Status Means
Registered	Invitees who have registered and plan to attend the event.
Cancelled	Individuals who have cancelled their registration and will not be attending.
Attended	Registrants who attended the event.
Not Attended	Registrants who accepted the invitation but did not attend the event.

Additionally, you can export a report of the Registration Details. This report shows you who has registered, if they have

paid and other details. The report is not viewable online but can be downloaded as a .CSV file and then viewed in a spreadsheet or any other application that supports the .CSV format.

To Download a Registration Details Report:

- 1. On the **Event Details** page click the **Event Reporting** bar to expand the view.
- 2. From the drop-down menu, select Registration Details then click the Run Report button.
 - It may take a few minutes for the report to run. Click the refresh button to update the view. You will know when the report is ready when the status of **Pending** is replaced by **Download**.
- 3. Click Complete in the status column.
- 4. Save the file (.CSV format) to your computer.

Note: For information on downloading reports, be sure to check out Constant Contacts FAQs located in the learning center.

Registration Follow-up:

There are a lot of things you can do to stay on top of your event during the interval between sending the receiving your first responses and when the event is held. Here are a couple of ideas.

- Email registrants about important updates or changes to the event such as location, date, or time.
- Send reminders to your registrants. This will help generate enthusiasm of the event and may even prompt them to forward meeting invitations to a wider audience.

To Send email Follow-ups:

- 1. On the Event Details page click, Email Registered Attendees.
- 2. Enter or edit information in the required fields. Make sure you create a subject line makes clear the reason why you are sending an email follow-up.
- 3. Customize your email template. For the purpose of simplicity, you may want to match the look of your event invitation.
- 4. Schedule the email for sending.

There is no list selection because your email will only be sent to the registrants for your event.

Note:

While it's important to maintain communication with your registrants, you should strike a balance between emailing useful information and over communicating. Put yourself in the registrants' position and ask yourself how often you'd like to receive information about an event you are already attending.

The Calendar:

The calendar is a feature you can use to publicize your events to your viewers. When you create an event, it automatically displays on the calendar. Each calendar has a web address, (URL) that you can paste into your own Website, emails, and social media sites like Facebook or Twitter. A viewer of your calendar can click through the months to view events displayed on a specific day. If the user clicks the link embedded in the calendar date, he or she will be taken automatically to the event page. The Calendar URL can be viewed by clicking the Calendar Options link located under the Events Tab. Once you copy this link you can then paste into any of your web pages or emails.



The Invitee Experience:

Now that you've read about the use of Constant Contact Event Marketing to create, publicize, and manage your events, let's have a look of what your event invitees will see with an example of a meeting invitation, registration form, and the event homepage.

You should note that while this example follows a sequence, the experience won't be the same for every meeting invitee.

One way an invitee may first find out about an event is that he or she might receive an email from the organizer of the event, in this case, CTCT Spa and Fitness.



The Email Invitation

Much like an email from Constant Contact Email Marketing, the invitee can open the email to a full window and view the message.

The invitee can view the invitation with the following features made by the event organizer.

- The company logo is included at the top.
- Colors have been customized to match the branding of CTCT Spa and Fitness.
- Content about the event is included as well as an image
- Event Information is automatically included.
- A link to accept the invitation is at the bottom.



The Event Home Page:

In the event that the Event organizer has created one, the invitee can also view the Event Homepage when he or she clicks to accept the invitation. The Event homepage can contain additional information about the event as well as useful links relating to the event or the event creator's business. As an added benefit, the invitee can copy the Event URL and send it to his or her friends who may be interested in attending the event.



The Registration Page

Prior to seeing the full registration form, the invitee will see a form that asks them to enter and verify their email address. This allows Constant Contact to check if they have already registered to prevent duplicate registrations. Once on the registration page, the invitee will see areas to enter required as well as optional information before submitting the registration.

The invitee can also:

- Select one of potentially many payment options.
 - If a credit card is the selected payment option, the registrant will be directed to a PayPal page. This will allow the registrant to easily pay for the event with a credit card. As a site owner, you must have either a PayPal Premier or Business account.
- View an interactive map which shows where the event will be held.
- Add the event to his or her calendar in an application like Google Calendar.



Additional Communication.

In addition to the materials described, the registrant will view a confirmation page once they submit their registration as well as an email which will be sent to them for their records. The registrant may also receive subsequent emails from the event organizer communicating any changes to the event or reminders as the event day draws close.

From: CTCTfit <dbrunelle@constantcontact.com>
Date: Wed, Aug 12, 2009 at 1:45 PM
Subject: Thank you for registering for Annual Healthy Harvest Food Fest
To: dbrunelle66@gmail.com

Thank you again for registering for our event. This email is confirmation of your successful registration. If any of the information displayed below is incorrect, please contact us as soon as possible.

First Name: Daniel
Last Name: Brune
Payment Type: Check

Annual Healthy Harvest Food Fest

Where:
The Winville Banquet Center
1601 Trapele Road
Waltham, MA 012345

When:
October 23, 2009 - 07:00 PM
Add to my calendar
Fee: \$25.00