Event Management
in Dynamics 365

@stefanotempesta

Event Management

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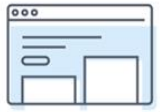
Registration & ticketing

Create registration forms and generate personalised QR codes for each participant. Accept cash, credit card or invoice



Event website

Easy to use website builder so you can build a personalised event website or landing page in your own CI/CD

Guest management & communication

Design beautiful HTML emails with our drag and drop editor - email participants to keep them in the loop

Check-in app & badge print solution

A digital check-in to reduce queues, with integrated QR reader, name search, and real time synchronisation. Print badges in real-time or before the event

Networking & event web app

Build out networking by allowing guests to access all event information before, during or after the event, letting participants get in contact with each other

Event analytics

Analyse participant behaviour, event registrations, mailing statistics and important data in real time and across multiple events

Event photo management software

Photos shared in real time to your website and your guests, and add name tags with the tagging app

Event marketing

Generate media interest with real time publication with one of our media partners

Live voting and feedback

Increase attendee participation with live voting during the event, and gather feedback afterwards

Technology

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Event Management

Key event-management features include:

- Seamless contact, registration, and attendance management features in one system.
- Business processes that guide users through the essential steps of event planning.
- Session, session track, and speaker management.
- Managing attendee passes to grant access to specific sessions or tracks.
- Venue management for tracking buildings, rooms, and room layouts.
- Guest logistics for registering hotels, room allocation, and reservations.
- Tracking sponsors and their sponsorships for each event.
- Creating webinars and simulcasts with attendance metrics.
- Reviewing the attendance history of each contact, including events and sessions attended.
- Feedback survey integration.

Event Management

A fully functioning event website you can publish that includes:

- Self-service attendee registration.
- Important details about all published events, including event name, venue, passes, session schedule, and speakers.
- All information drawn directly from your Dynamics 365 event-planning records, with updates automatically reflected on the event website.

And more:

- Photo tagging, VIP passes, “unconference” live voting, social media marketing, etc.

Setup an event

Event record (name, type, format, URL, schedule, timeline, location)

Agenda (sessions, tracks, speakers, sponsors)

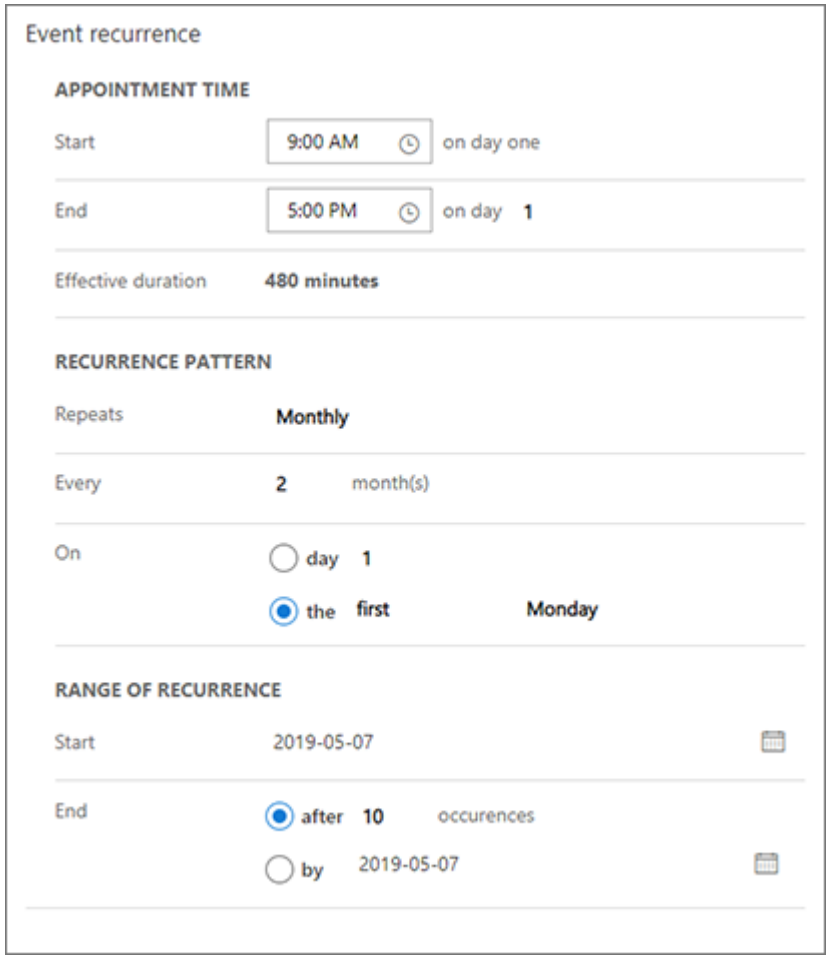
Registration and attendance (passes, custom fields, check-in, waitlist)

Additional information (team members, financials)

Room reservations (calendar)

Post event (surveys)

Recurring events



- Generate several identical events all at once.
- Schedule events that occur yearly, monthly, daily, etc.
- Manage the entire series from a single source.
- Customize individual event occurrences.
- Maintain a common schedule for each recurrence.

Event templates

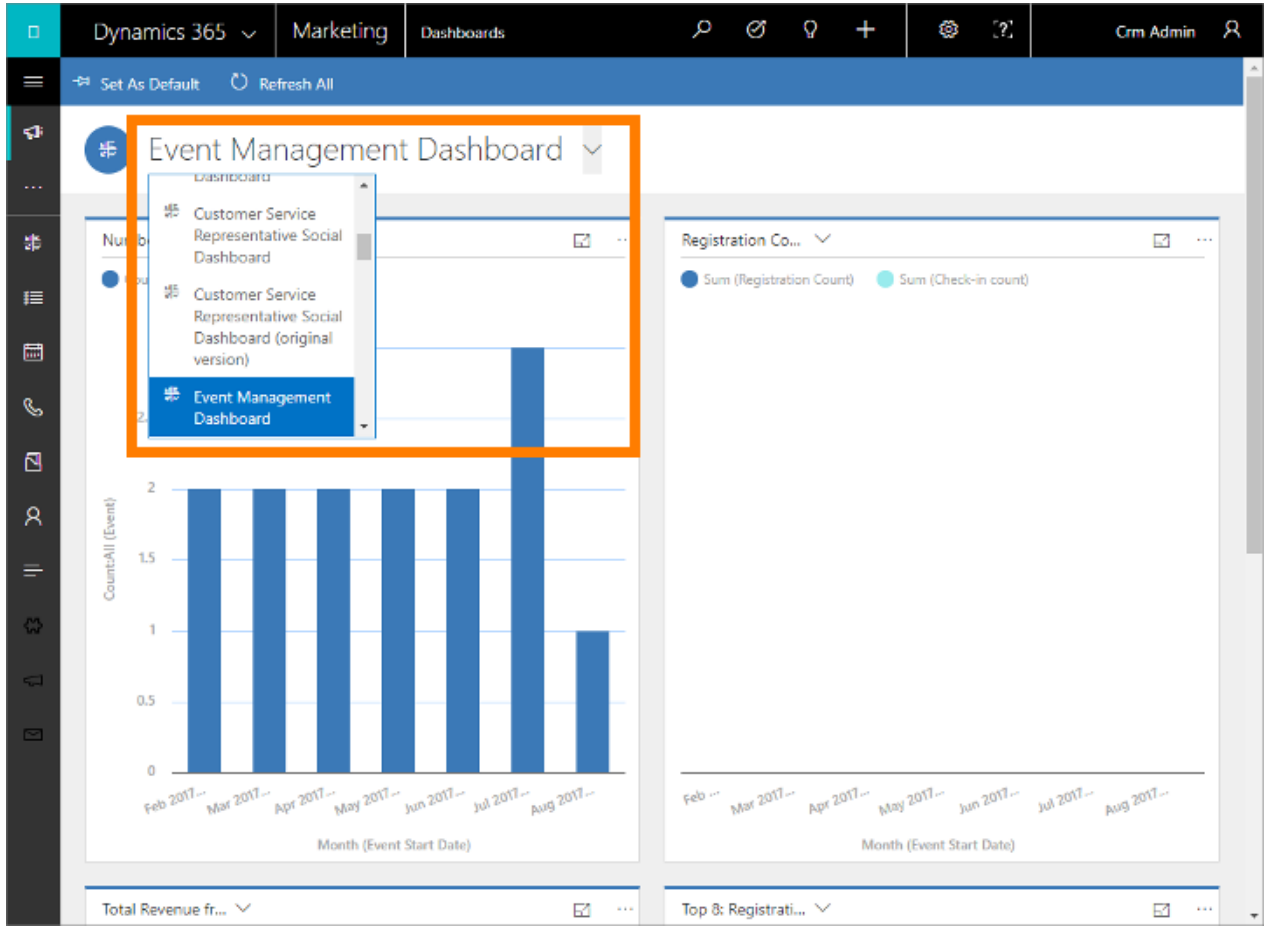
Basic event setup (name, description, type, etc.)

Event venues

Event sessions and speakers

Event passes

Event Management Dashboard



Event sponsorships

Sponsor companies are Account records.

The event website lists sponsors' name and logo.

Sponsorable articles are visibly present at the event and feature a sponsor's logo or message.

Each sponsorable article record must relate to a parent sponsorship record and include price and quantity information.

Event registration and waitlist

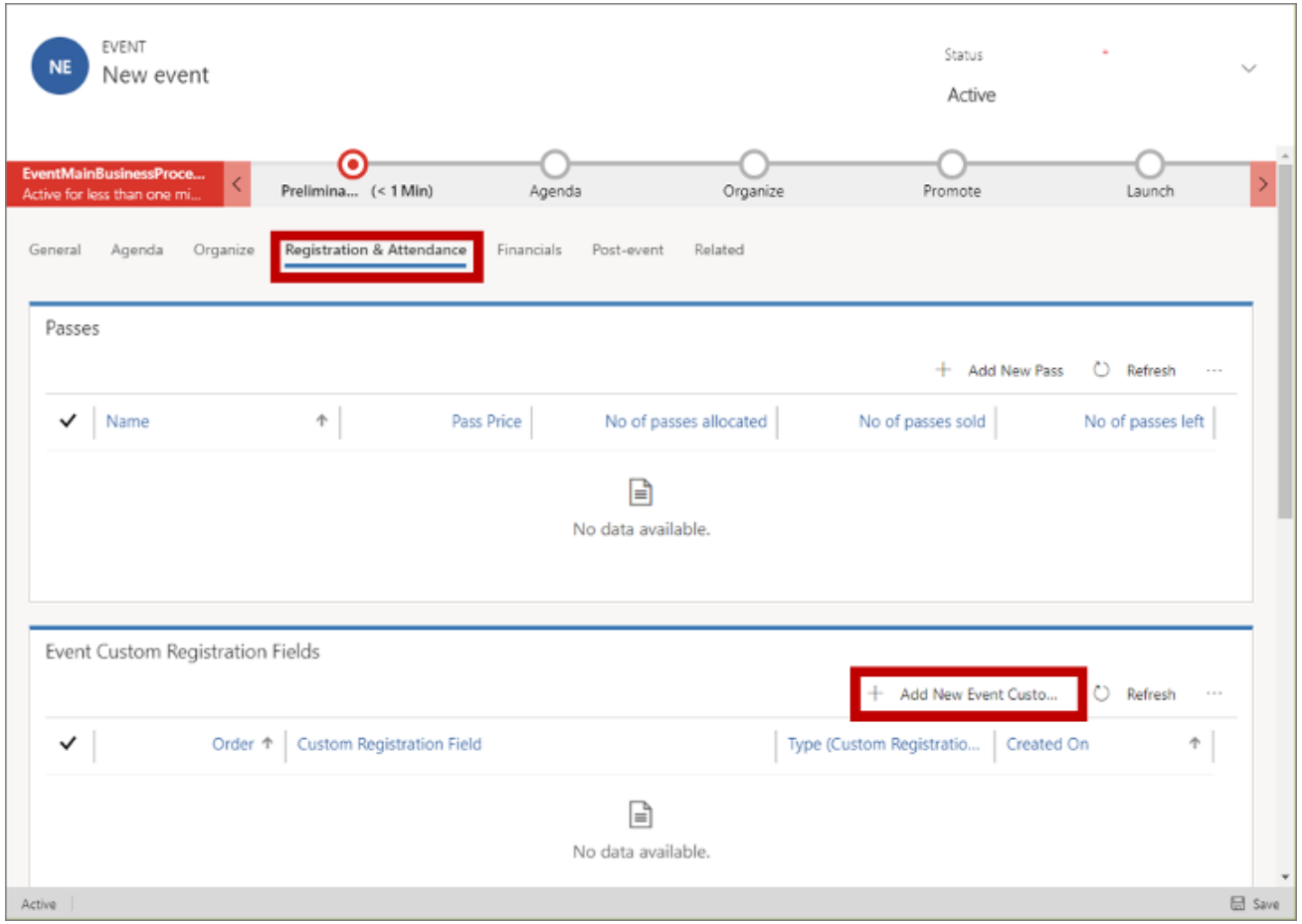
Event-level and Session-level registration.

- Session-based registrations not supported for events that have passes defined.

Event-level and Session-level waitlist.

- Auto-registration or invitation to register on available seat.
- Create a customer journey to send messages or invitations to waitlisted contacts.

Registration form custom fields



- Label
- Required
- Type (simple text, boolean, single choice, multiple choice)
- Choices

Invite event attendees

Invite contacts to events.

Register attendees for events, sessions and passes.

Book hotel rooms for staff, speakers, and guests.

Attendee logistics and accommodation

Logistics features are informational, that is not exposed directly to attendees through the standard event website.

Event Vendors (External company account record)

Hotels (can be associated to a hotel group = event vendor)

Hotel Room Allocations

Hotel Room Reservations

Event website

All Events

Speakers

Session Schedule

Sign-in or Register

Session Tracks

Manage Profile

Event website

Hosting options:

1. ~~Dynamics 365 native portal~~
2. Angular site hosted by Dynamics 365 portals → Event URL
3. Angular site hosted externally → Custom URL

The event and all its settings remain editable after publish.

Privacy notice

Dynamics 365 Marketing does not include an out-of-the-box cookie-consent feature.

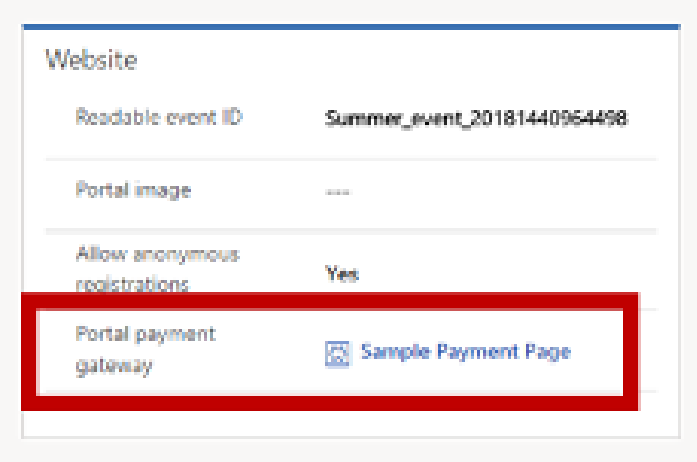
- Marketing pages use cookies to pre-fill known contacts.
- Event websites uses cookies to log visits to web pages.

Dynamics 365 Marketing sets four different types of cookies:

- Long-term behavioural-analysis cookie
- Short-term, single-visit cookie
- Marketing page registration cookie
- Event website

Online payment

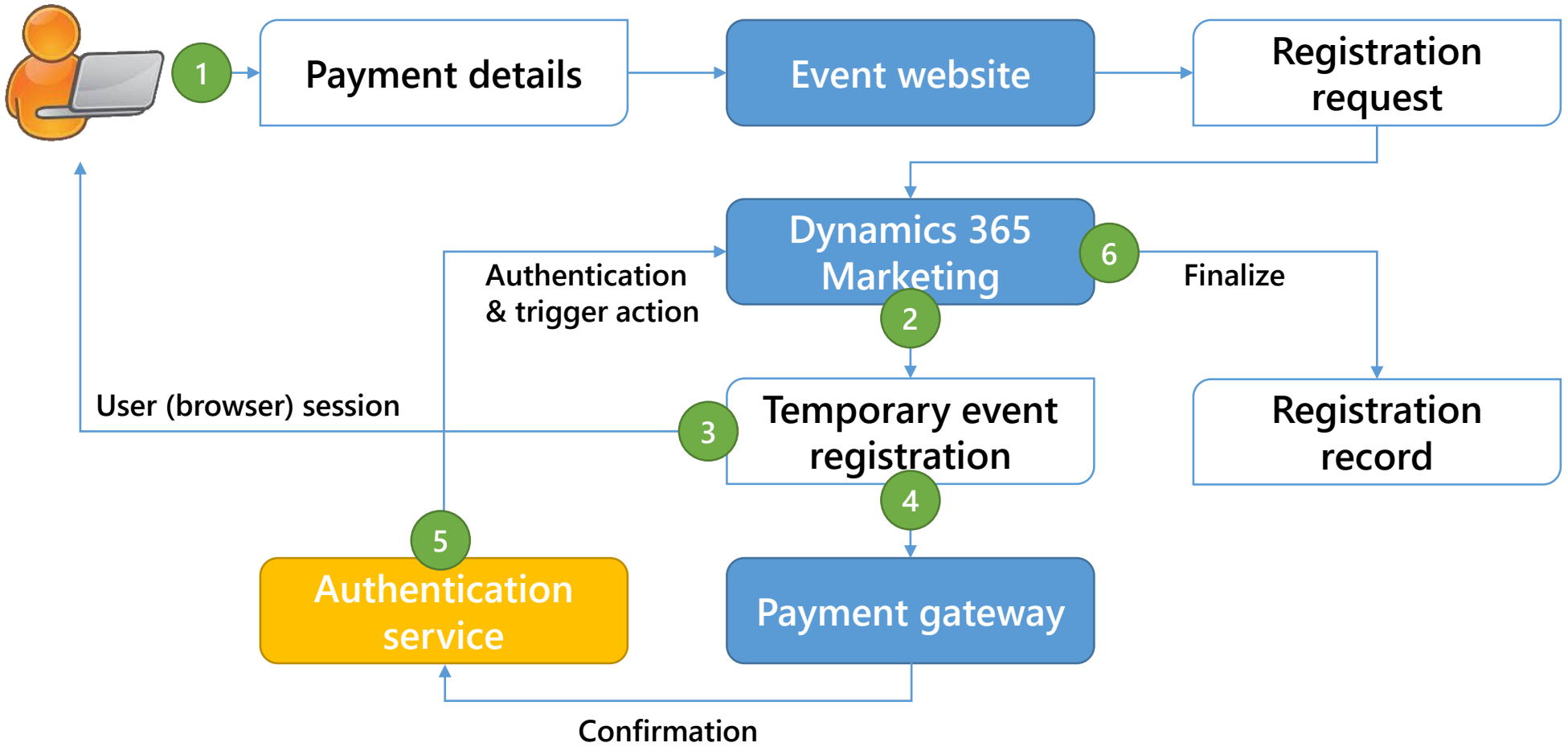
To enable online payment, you have to make an agreement with a third-party payment provider.



Dynamics 365 portal hosted sites → Set the payment gateway for an event.

Externally hosted sites → Customize!

Payment confirmation



Post-event follow up

Collect attendee feedback with a survey.

- Voice of the Customer
- Customer journey → Marketing email message
- Non-anonymous surveys are not currently supported

Hand off to sales.

Event and session attendance review.

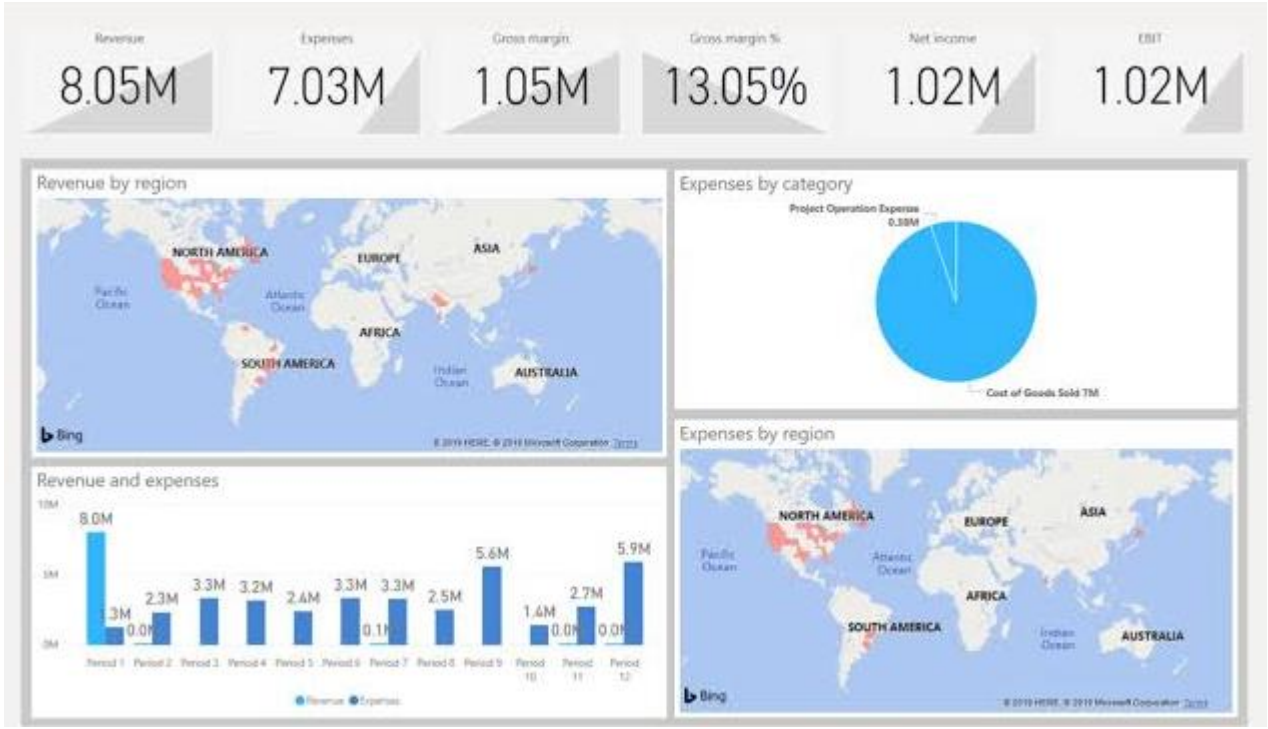
Event financials

Venue costs

Speaker costs

Sponsorship income
(including articles)

Pass sales



Next steps…

Finance	Costs and revenue tracking, billing.
Sales	Lead generation.
Service	Helpdesk on registrations and bookings.
HR	Internal events for goal-driven professional development.
Power BI	Advanced reporting and sales/registration predictions.
Power Automate	Integration with third-party portals (Sitecore, Adobe XP)
Power Virtual Agents	Chatbots for assisted registration and custom service.
Power Apps	Mobile apps for personal schedule, contact speakers and sponsors, promotions, follow-ups.

Get started!

Event planning and management
https://docs.microsoft.com/dynamics365/marketing/event-management

Dynamics 365 for Marketing - Event Management
https://youtu.be/mN6SBF28JqQ

Capturing Event Registration, Insight and Attendance
https://youtu.be/XS_mmOUS7HU

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