OneStream

Creating Events in WordPress
Learn how to how to create event landing pages from start to finish

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Creating a New Event in WordPress

Cloning Event Templates

1. Log in to WordPress.

2. Once logged in, using the navigation menu on the left-hand side, click **Events**.

3. Once the menu expands, search for one of the following template names:
   a. ***General Event Template (steps highlighted in this document)
   b. ***Speaker/Host Event Template
   c. Additional templates available based on need. Submit a request for assistance on layouts for unique content.

4. Once found, hover over the name until a list of options appears below the template's name.

5. Click **Clone**.

6. The cloned copy will appear at the top of the events list. Click into the cloned template.

Event Logistics and Styling

When you get to the template, you'll notice many fields have three asterisks (***) with some placeholder content after them. The *** asterisks represent fields you will need to populate, and you can easily search for these fields by using ctrl + F or command + F and searching for ***.

1. At the top of template, replace the template's title with the name of the event. The name should be generated using the Naming Convention and UTM Builder.

| ***General Event Template	→	NA Central FM - Xtreme Xperience Omaha - 15July2022

2. From top to bottom, fill out your event details:

    a. **Pre-heading:** This automatically defaults to the event type selected (example: Webinar). If you need to overwrite it, place text in this field.

    b. **Heading:** Input the title of the event (how you want it to appear on the landing page).

    c. **Sub-heading:** Enter additional context about your event.

    d. **Blurb:**
        i. **DATE:** Input the date of the event using the following format: **Friday, June 4th.**
        ii. **TIME:** Input the time of the event in the following format: 11:00 AM EST.

Example Event Page:

    e. **Background Image:** If you'd like to include a background image, select it by clicking **Add Image**. Select a file from your computer or from the Media Library.
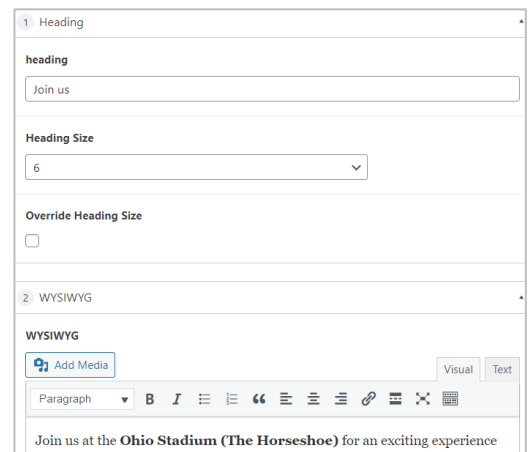
With Background
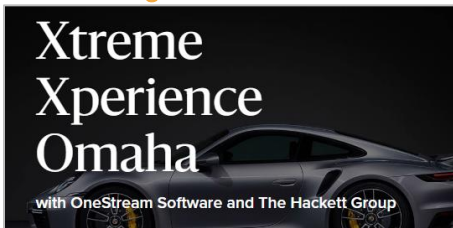
Without Background

    f. **Event Parts**
        i. **Heading:** Enter a heading to appear your main content. Do not change the heading size
        ii. **Heading size:** Leave at size 6.
        iii. **Override Heading Size:** Leave unchecked.
        iv. **WYSIWYG**: Replace the ***Main Content text with your event details.

    g. **Variation:** Leave this set to number 1.

Building a Form in HubSpot

Once you reach the "Form Heading" field in WordPress:

1. Enter a heading for your form (example; Reserve Your Spot).

2. Save your event as a draft by clicking **Save Draft**.

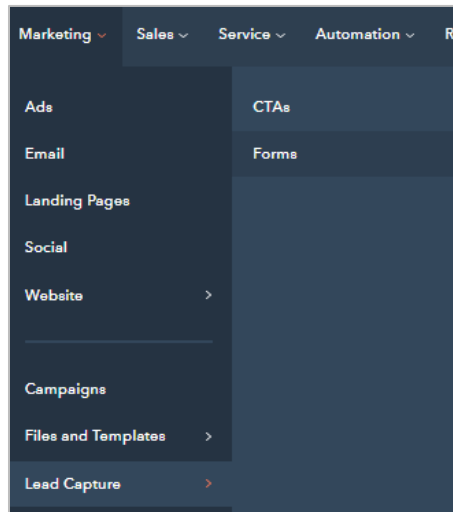3. Transition to HubSpot to build out the form using the steps below.

Note

If your form is already built, locate your HubSpot Form ID and Salesforce Campaign ID and continuing populating the form details section on your event page.

Cloning the template

1. Log in to [HubSpot](#).

2. Using the top navigation, select **Marketing**, navigate to **Lead Capture**, and click **Forms**.

3. Search for one of the following forms:
   a. NA FM – Event Form Template – APR2021
   b. Global – Event Form Template – APR2021

4. Once found, hover over the form name until the Clone button appears. Click **Clone**.
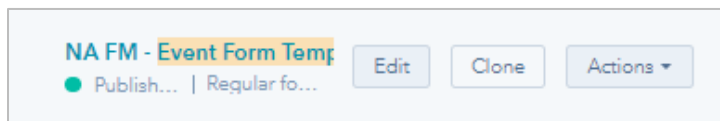
5. Rename the cloned form utilizing the Naming Conventions and UTM Builder. Click **Clone**.

Note
Every event must have its own form. A single form can no longer be use for multiple events.

Clone form ✕

You're about to clone this existing form. Please enter a name for the new copy.

New form name

NA Central Form - FM - Principal Charity Classic

Clone

Editing the Form tab

The **only field on this form that should be edited** is the "shipping_form" field. This form should either be updated OR removed if not necessary.

☐ I have filled out the **event-type form** * *shipping_form* Contact Property

Updating the Shipping Field

1. To update the field, click within the field so a box appears on the right side of the page.

2. Edit the name of the form within the label box (for example: Whiskey Tasting Form) and update the hyperlinked text to the corresponding form.

Label ⓘ

B *I* U T_x 🔗

I have filled out the **event-type form**

✏️ ⊕ URL: http://www.onestrea... ⬀

Deleting the Shipping Field

To delete the field, hover over the field and click the trashcan icon.
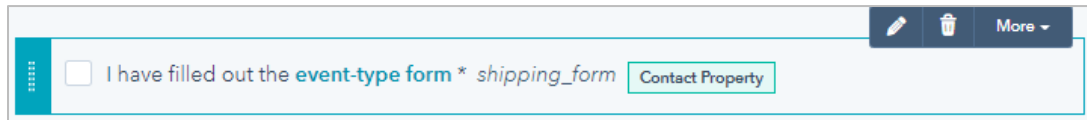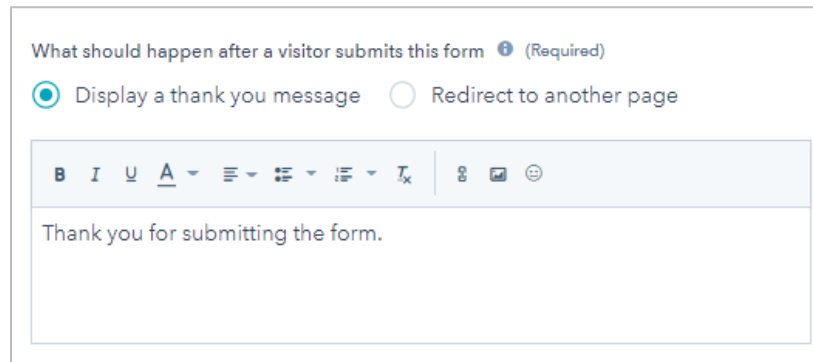

Editing the Thank You Message tab

1. While in the form, navigate to the Options tab and make sure the "Display a thank you message" is checked.
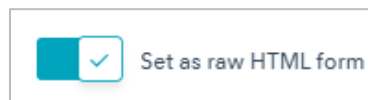
> **!** **Important**
>
> Make sure "Redirected to another page" is NOT selected. If it is, the WordPress Thank You page will not work properly.

2. Paste the following message in the text box: "Thank you for submitting the form."

Editing Style & preview tab

1. Navigate to the Style & preview tab.

2. Make sure "Set as raw HTML form" is toggled on.

Publishing the form

1. Click the orange **Update** button on the top right of the page.

2. On the bottom menu that appears, click **Publish**.

Linking the form to a Salesforce campaign

1. Another popup should appear that states: Your updated form has been published.

2. On this popup you'll need to select the corresponding Salesforce campaign.

   Note
   The campaign must already be set up in Salesforce and set to Active.

Copy the HubSpot Form ID and Salesforce Campaign ID

After selecting the corresponding Salesforce campaign from the dropdown, you'll need to copy the code shown below the dropdown. These IDs will be placed in your WordPress Event page.

1. Click **Copy**.

2. Paste the copied text into a word document or Notepad application.

HubSpot Form ID

1. To grab the HubSpot Form ID, highlight the text between the quotations after **formId** and copy it.

```
<script charset="utf-8" type="text/javascript"
src="//js.hsforms.net/forms/v2.js"></script>
<script>
 hbspt.forms.create({
   region: "na1",
   portalId: "2020381",
   formId: "0d9dbbe7-9d75-4d0c-b513-4cfdf571516b",
   sfdcCampaignId: "7011U000000hv8BQAQ"
 });
</script>
```

2. Navigate back to your WordPress event page.

3. Locate the Form ID field and paste the copied text.

Form ID

***[FORM ID]

Salesforce Campaign ID

1. To grab the Salesforce Campaign ID, highlight the text between the quotations after **sfdcCampaignId** and copy it.

```
<script charset="utf-8" type="text/javascript"
src="//js.hsforms.net/forms/v2.js"></script>
<script>
 hbspt.forms.create({
    region: "na1",
    portalId: "2020381",
    formId: "0d9dbbe7-9d75-4d0c-b513-4cfdf571516b",
    sfdcCampaignId: "7011U000000hv8BQAQ"
  });
</script>
```

2. Navigate back to your WordPress event page.

3. Locate the Salesforce ID field and paste the copied text.

Salesforce ID

***[SALESFORCE ID]

Setting Up the Thank You Message in WordPress

After inputting your Salesforce Campaign ID, continue populating the rest of your form details on the WordPress event page.

1. **Alternate Languages**: Leave this box unchecked.

2. **Custom Submit Logic**: Leave checked if you would like a customized thank you message. Uncheck it if you'd like to display the thank you message from your form in HubSpot.

3. **Custom Submit Content**: Populate this field with a customized thank you message. See the table to the right for example messages.

Sample Thank You Text	
Example 1	Example 2
Thank you for registering. We are looking forward to seeing you! You will receive a confirmation email shortly. Be sure to submit your shipping information using this form.	Thank you for registering. We are looking forward to seeing you! You will receive a confirmation email shortly. In the meantime, check out more upcoming events and webinars by clicking here.

4. **Custom Download Link:** Leave blank.

5. **Custom Video Embed**: Leave blank.

6. **Custom Redirect Link**: Insert a link to a page you'd like the contact to be redirected to upon submission.

7. **Block Options (Anchor ID)**: Leave blank.

Editing Post Options

At the bottom of your event page, on the Post Options section, populate the following fields:

1. **Override Link:** If your event links to an external page, enter the URL to that page.

2. **Override Title**: This is the title of the event visitors will see when viewing the list of all available events.

Yoast SEO

1. In the Yoast SEO section, select **Desktop result**.

2. Update the **SEO title** field with the name of your event followed by OneStream Software (Example: Whiskey Tasting Central Event – OneStream Software).

Note
You can remove the default variables by backspacing.

3. Update the **Meta description** field with a brief description of your event.

4. Lastly, scroll down to the **Advanced** tab and confirm both statements are set to "No."

   a. Allow search engines to show this Event in search results?

   b. Should search engines follow links on this Event?

Updating Event Tab Details

Once all the event and form information is populated in the template and you've updated the Yoast SEO section, you'll need to scroll through the settings on the right side of the screen to update information like: URL slug, Regions, Event Types, Languages, etc.

1. Navigate to the Event tab in the event page editor.
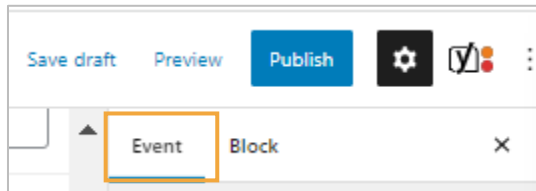
URL Slug

1. Scroll down until you find the Permalink section.
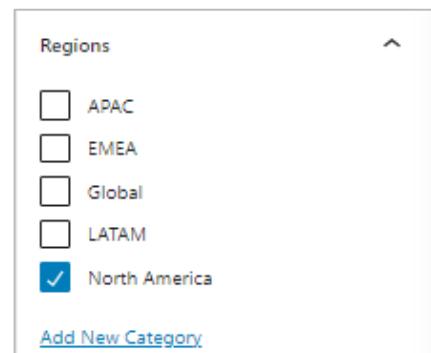
2. Update the URL Slug by copying the text from the header and pasting it into the field.
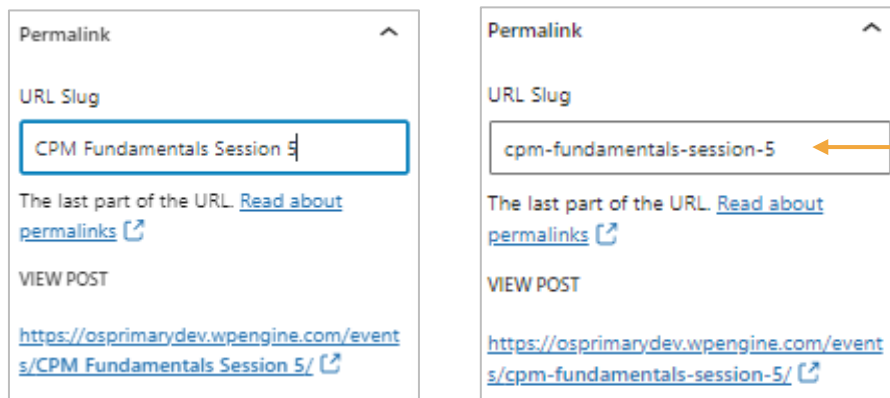
Note
Dashes will automatically be added, and sentence casing will be adjusted.

Region

1. Scroll down to the Regions section.

2. Select the applicable region from the list of options. **Do not** add a new region category.

Event Type

1. Scroll to the Event Types section.

2. Select the applicable event type from the list of options. **Do not** add additional categories.
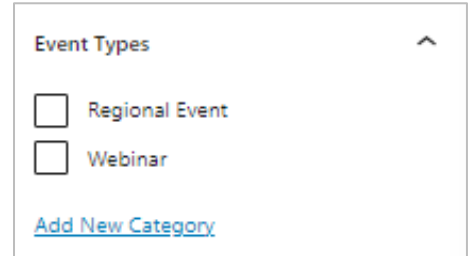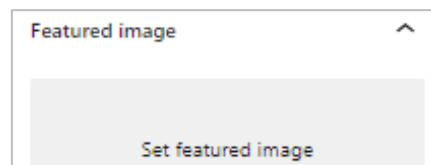

Languages

1. Scroll to the Languages section.

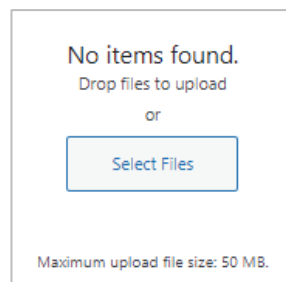2. Select the language from the list. **Do not** add in additional language categories.
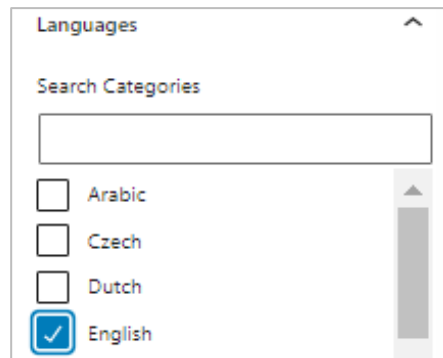
Featured image

1. Scroll to the featured image section.

2. Select **Set Featured Image**. This is the image on the curated list of upcoming events.

3. To add a new image, click **Select Files** and choose an image from your computer.
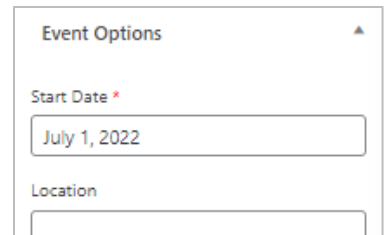
For best results, uploaded images should follow the below requirements:

| Image Attribute	Specification
Image size	Between 1500 and 2500 pixels wide
File type	Only .jpg, .gif, or .png
File size	500 KB of less for best results
File name	Only use letters, numbers, underscores, and hyphens
Resolutions	60 MP (megapixel) limit
Color mode	RGB (Red, Green, Blue)
Color profile	sRGB

Event options

1. Scroll to the Event Options section.

2. Fill in the event Start Date and optionally add the Location.

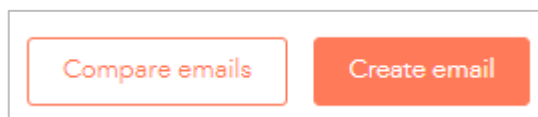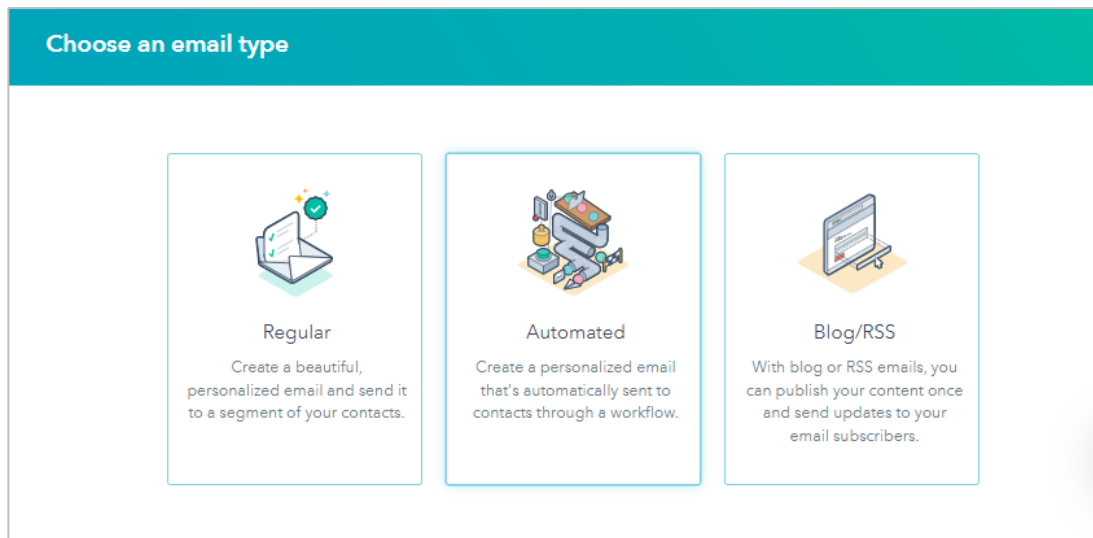
Creating a Follow Up Email

1. Log in to HubSpot.

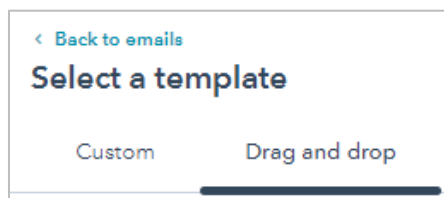2. Using the top menu navigation, click **Marketing**.
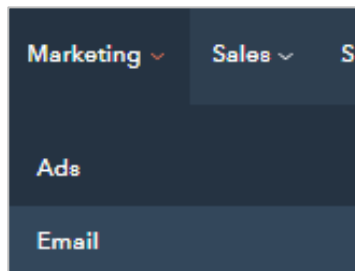
3. Select **Email**.

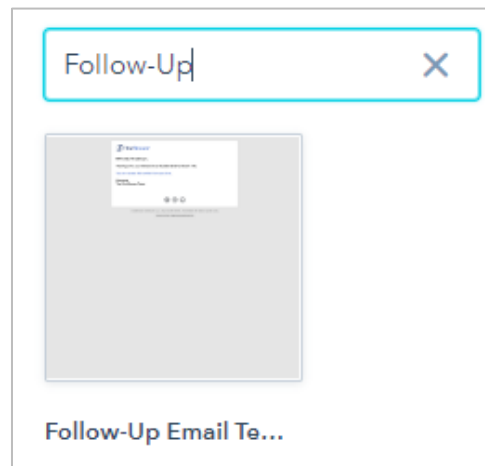4. Select the **Create email** button on the top right.

5. Click **Automated** email.

6. On the Select a template screen, navigate to the **Drag and drop** tab.

7. Using the search bar, look for and select the **Follow-Up Email Template**.

8. Rename the email following the [Naming Convention & UTM Builder](#).
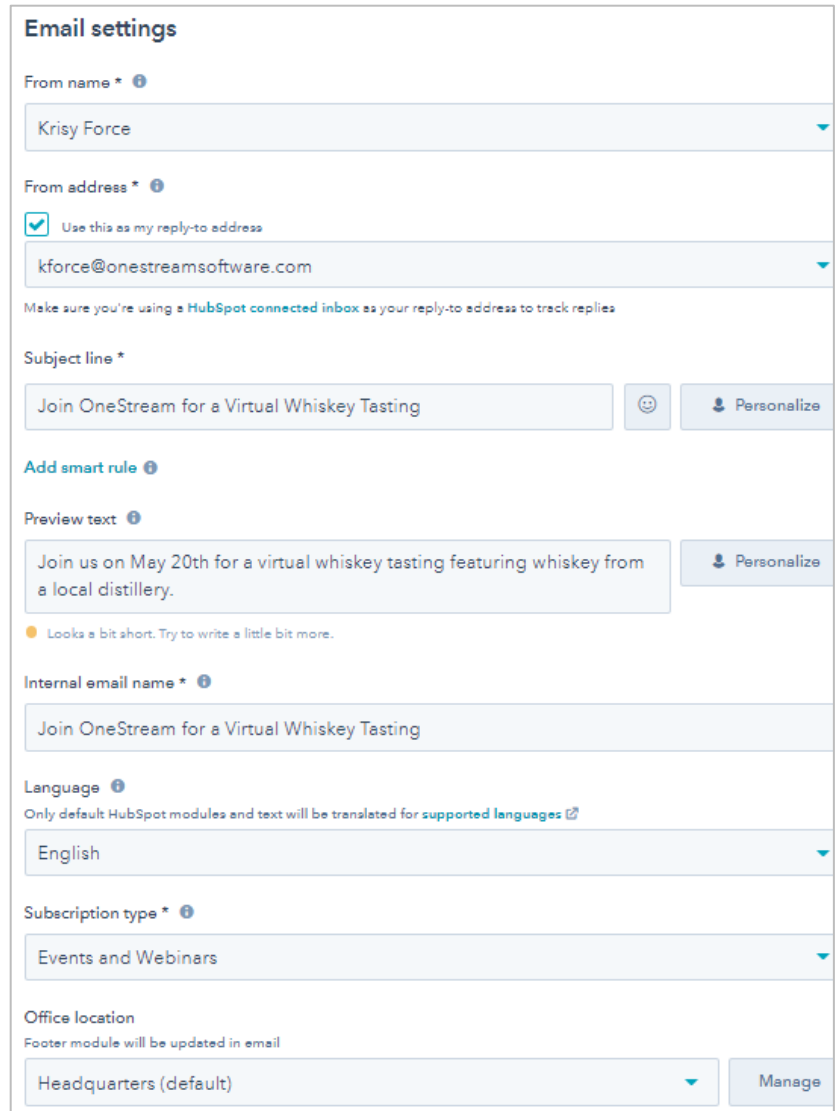
Updating the email template

Update the email template to include text, images, and buttons. Make sure everything is linked correctly.

Updating settings

1. Select the **Settings** tab from the top menu and fill in the settings options:

   a. **From name**: The name recipients will see.

   b. **From address**: The address recipients will see.

   c. **Subject line**: This should communicate exactly what the email is about.

   d. **Preview text**: This will be used as the preview text that displays in some email clients.

   e. **Internal email name**: Internal email name.

   f. **Language**: Any default content in your email that has translations enabled will appear in this language.

   g. **Subscription type**: Select a subscription type for your email send.

   Email settings

   From name * ⓘ

   Krisy Force

   From address * ⓘ

   ☑ Use this as my reply-to address

   kforce@onestreamsoftware.com

   Make sure you're using a **HubSpot connected inbox** as your reply-to address to track replies

   Subject line *

   Join OneStream for a Virtual Whiskey Tasting   ☺   👤 Personalize

   Add smart rule ⓘ

   Preview text ⓘ

   Join us on May 20th for a virtual whiskey tasting featuring whiskey from a local distillery.   👤 Personalize

   🟠 Looks a bit short. Try to write a little bit more.

   Internal email name * ⓘ

   Join OneStream for a Virtual Whiskey Tasting

   Language ⓘ
   Only default HubSpot modules and text will be translated for **supported languages** �

   English

   Subscription type * ⓘ

   Events and Webinars

   Office location
   Footer module will be updated in email

   Headquarters (default)   Manage

   h. **Office location**: Select the headquarters location you want displayed in the email footer.

Adding Follow-Up Email to a Workflow

1. To add your email to a workflow, navigate using the top menu to **Automation**.

2. Select **Workflows**.
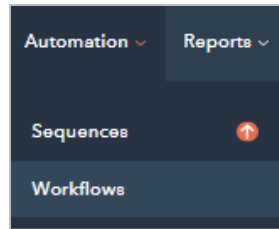
3. Select the corresponding folder.

> **Note**
> Folder names are based on the region of the event. You may copy a template or start from scratch.
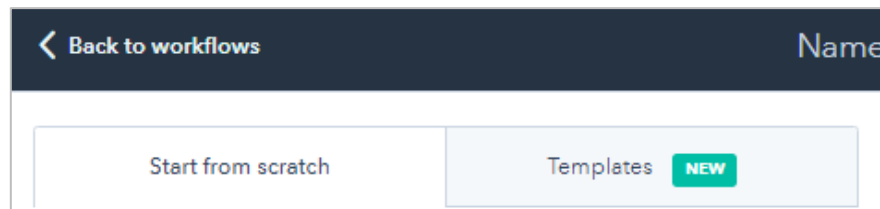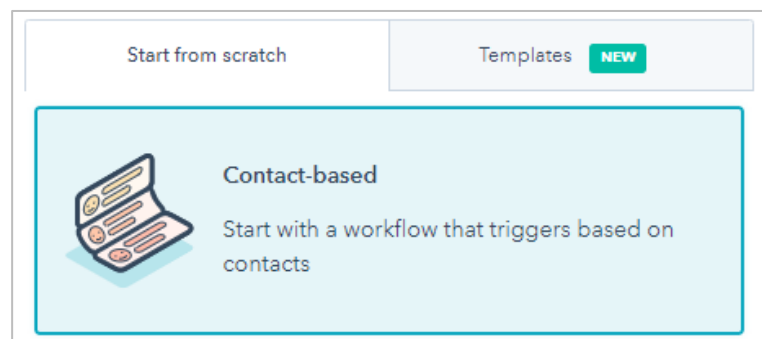
> **Important**
> For Zoom Webinars, create the workflows as you do today, and allow Zoom to send the follow up email.

4. Within the correct folder, click the orange **Create workflow** button in the upper right.

5. Toggle to **Start from scratch**.

6. Click **Contact-based**.

7. Select the orange **Next** button on the top right of the screen.
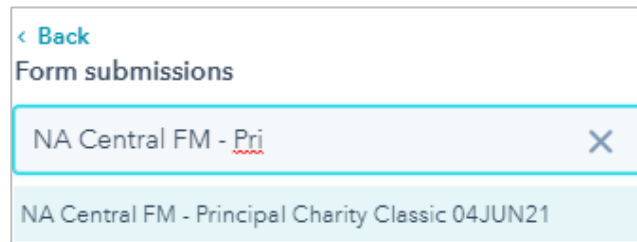
8. Rename the workflow following the [Naming Conventions and UTM Builder](#).

Follow Up - NA Central FM - Principal Charity Classic VIP Golf - 04JUN2021 ✎

9. Click **Set up triggers** within the Contact Enrollment Trigger box.

10. Choose **Form Submissions**.

11. Search for the corresponding form and select it.

‹ Back
Form submissions

NA Central FM - Pri   ✕

NA Central FM - Principal Charity Classic 04JUN21

12. Make sure the radio button next to **Contact has filled out form on** is selected.

13. Set the drop-down underneath to **Any page**.

‹ Back
NA Central FM - Principal Charity Classic 04JUN21
See details ☑

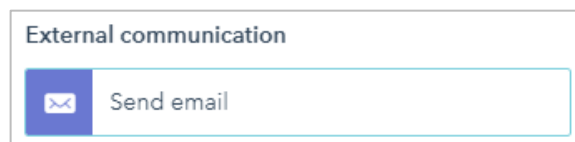◉ Contact has filled out form on

Any page   ▼

◯ Contact hasn't filled out form on

14. Click **Apply filter**.

15. Click **Save**.

16. Next, select the + sign after the contact enrollment trigger. This will create a new action in the workflow.

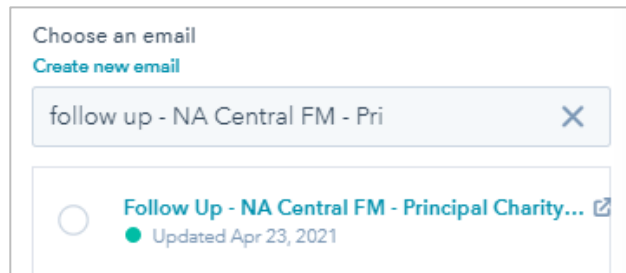17. Scroll down to the External Communication section and click **Send Email**.

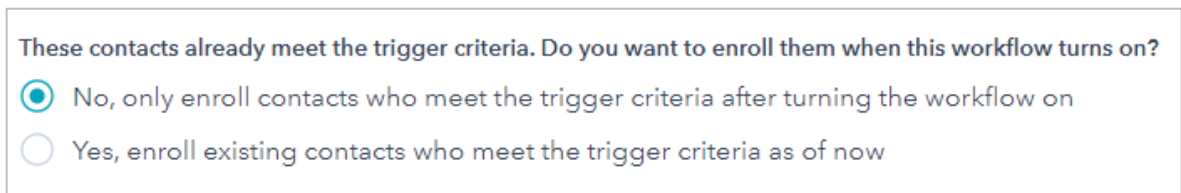**External communication**

✉ Send email

18. Search and select the corresponding follow up email.

19. Click **Save**.

20. In the upper right, click the orange **Review and publish** button.

21. On the following screen, select "No, only enroll contacts who meet the trigger criteria after turning the workflow on."


22. Select the orange **Turn on** button in the upper right of the page to turn on the workflow.

Updating an Event that is at Capacity

1. Using the search bar, navigate to the event that is at capacity in WordPress.

2. Remove the text from the Form ID section. This will remove the form from the landing page so future contacts can no longer register.

3. Edit your existing landing page content to state your event is closed. For example, "Registration for this event is now closed. Please contact your OneStream Account Executive to be added to the waitlist."
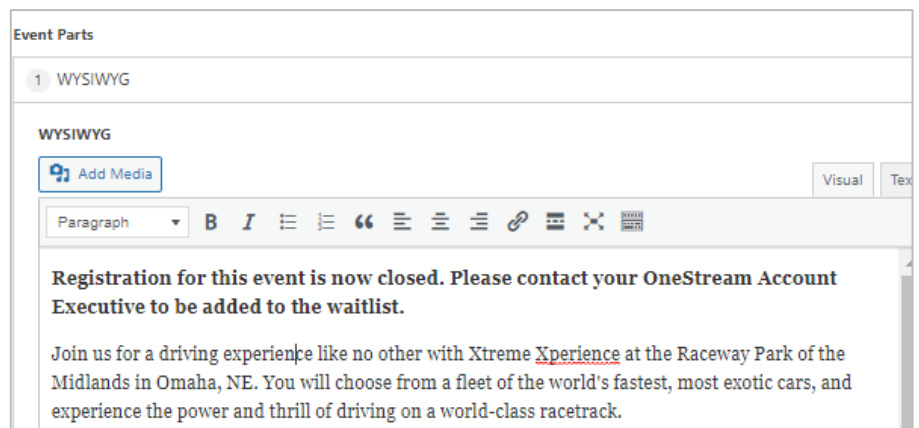
4. Select **Update** in the top right of the screen to apply your changes.