Before your first event – plan and manage overall settings

You'll find over-arching information and settings in:

Application Setup (click the **Application Setup** button in the top right of the Event Selection screen) – This is where you create settings for ALL your events, user permissions etc. Read more about Application Setup.

or

The **Setup Panel** within your event (this is where you create overall settings for a specific event). Read more about the Setup Panel.

Below is a basic introduction to each of these areas:

Application Setup – settings for all your events

Under **Application Setup**, you'll find:

- **System Setup** – global settings for managing users, passwords, Event Groups and External Connections, such as gateways and Google Analytics.
- **Advanced Setup** – advanced settings for special App Store functions, Custom Fields and Password Preferences.
- **Libraries** – manage various libraries for Amenities, Hotels, Suppliers, Room Types, Currency, Language, Ports and Carriers.

EventsAir user permissions

You can sign each user in EventsAir Administrator rights, or limit what they can see and edit.

For the security of your attendees, and correct access for your employees, it's important to review and set Access Rights correctly.

Administrators have the ability to unlock specific modules or settings to gain access to all modules, and change permissions for other users.

When set to No Access, users can't set up any Modules or change other settings.

A red lock (locked) or a green lock (unlocked) to the right of each Module or Setting indicates if access is available to non-administrators or users with assigned access. Anyone with assigned access will be able to click on the lock to switch it from green to red or red to green.

Inside your event – Event Setup Panel

While you can make changes later, it's much easier if you set up everything up correctly from the start. It will help you to ensure you and your team are in agreement beforehand, and you've planned out elements such as:

- Event name, dates, location and time zone
- Event branding (logo, organizer contact details, colors/themes)
- Hotel details (address, phone, fax, room types, rates, room block details, etc.)
- Attendee contact details (what do you want to collect on the registration form)
- Event budget (expense and income categories, supplier information, anticipated fees and expenses, if known)
- Registration fees, categories, early/regular/late dates
- Workshop details (dates, titles, rooms, etc.)
- Which meals and functions are included and which are optional
- Tours or spouse/guest programs

System Setup – Where you create basic settings for your Event including overall event preferences, Brand, and Financial settings.

Advanced Setup – Where you configure Accounting, Packages, Project Manager and Run Sheet user access, edit Name Badges, and create Custom Fields.

Modules Setup – Where you configure each module (see more information below).

SYSTEM SETUP

✓	Event	Configure event settings such as modules enabled, access rights, contact store, event logo and analytics
✓	Brand	Configure the style and format of your Interactive sites, portals and apps, including colors, fonts, and font sizes
✓	Financial	Configure tax details, payment types, bank accounts and credit card gateways for your event

ADVANCED SETUP

✓	Accounting	Configure accounts and enable optional features
✓	Packages	Create module items to be included in a Package
✓	Project Manager	Add team members used in the Project Manager
✓	Run Sheet	Add team members and locations for use in the EventsAir run sheet function
✓	Name Badge Editor	Create custom name badge layouts for any kind of badge Merge data from any field in EventsAir, add graphics and QR codes
✓	Custom Fields	Create custom field tabs and fields for inclusion in any module in EventsAir Fields can be required or optional

Under **Module Setup**, (Setup Panel within your event), you'll find settings and preferences for the modules listed below (depending on what's been enabled in your event).

You'll want to configure these as fully as possible as you set up your event. For example, you don't want to be adding agenda items or registration types AFTER live registration opens, as this causes inaccurate information and a lot of extra work! However, some items can be delayed if necessary, such as budgets, exhibitor registration and surveys.

- Contact
- Notes
- Marketing
- Survey
- Registrations
- Functions
- Accommodation
- Travel
- Presentations

- Exhibitions
- Sponsorship
- Membership