Best Practices for Canceled & Postponed Events

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Introduction

Sometimes, unavoidable circumstances arise and your event can't proceed as planned. When faced with the challenge of cancelling or postponing an event, think carefully about how you'll deal with both the current situation and any future replacement event.

This white paper will review the different options and provide checklists and processes you may consider when developing your own cancelation or postponement policy.

> NOTE: These checklists and suggestions offer ideas, however you and your management team will be the ultimate decision-makers on how to proceed with your cancelations or postponements. You should always design an enact the exact set of processes and communications that fit your specific events or meetings.

To Postpone or Cancel?

The decision to postpone or cancel is sometimes something you can directly control; at other times, circumstances may dictate how you proceed.

If you are faced with such as challenge, some questions you may ask are:

- Can I postpone to a future date and keep my event in the same format and schedule as before?
- How will a cancelation or postponement affect my cancelation refund policies?
- Will my hotel partner be able to work with me on this change in schedule?
- How will I manage credit card and other refunds or credit?

Event Cancelation

Cancelling an event involves a series of steps that include the following:

- Communicating with your attendees
- Review and document updates to your Payment and Cancelation policies BEFORE you issue refunds
- Updating your Payment and Cancelation policies in EventsAir
- Bulk cancelling all elements of your event in EventsAir
- Issuing refunds as appropriate to your attendees
- Release accommodation inventory back to your partner hotels
- Review and cancel all other supplier contracts as appropriate

Your goal here is to end up with a fully cancelled event with all funds accounted for.

Communication

EventsAir lets you create pre-written merge docs that can include financial and payment details, and you will want to prepare and test all communications as soon as you know that you are cancelling an event.

Documenting your cancelation policies

Ideally, you will have already defined a Payment and Cancelation policy for all your events. Depending on the reasons for cancelation, you may choose to change or remove your cancelation penalties. You should review and document any changes to policies before enacting them, as this is a fairly significant step.

Updating your payment and cancelation policies

Payment and Cancelation Policies can be defined in EventsAir for:

- Registrations
- Functions
- Accommodation
- Travel

For these four categories, you can define payment schedules and cancelation policies that are applied BEFORE anyone actually registers for your event.

Since a cancelation can have an impact on any cancelation penalties, you will want to make sure you edit these policies BEFORE registrations.

Exhibitions and Sponsorships have payment schedules that can be defined, but cancelation and refunds are handled on a case-by-case basis (depending on what your Terms & Conditions say). You will still want to review your published cancelation and refund policies for these categories as well.

Bulk Cancelation

In Express Actions, you have powerful tools including Bulk Cancelation. This tool lets you choose to cancel, in bulk, all or part of the registration details in your attendee records.

If you choose ALL, then every cancellable item in EventsAir will be bulk changed to Cancel. This action will effectively cancel your entire event, once every attendee (for all registration types) has been bulk canceled.

You may wish to bulk cancel in waves, filtering for different attendee types one group at a time. This is a useful way to be able to check your cancelation processes in smaller groups of attendees.

> **NOTE:** Remember, if you have cancelation policies in place, any penalties that are present in those policies are automatically applied to Registrations, Functions, Accommodation and Travel. Any penalties that apply to Exhibitors and Sponsors are managed manually by your team.

Issuing refunds

You need to decide if you'll be issuing refunds or credits to attend a future event.

If you're providing credits, you'll want to create a new payment type, typically based on the Cash account type, and give it a unique name, such as Event Credit. In this way, you can issue refunds for all outstanding fees, but you'll retain the funds under a different account that your team can easily track and report on.

If you are processing actual refunds, you'll want to coordinate with your Accounting Team so you can record check refund details.

For credit cards, you may choose to process all refunds external to EventsAir and then record those refunds directly on each attendee's record. If credit card payments were made online in an Interactive Site, you are also able to process refunds directly in EventsAir, if existing receipts are present and have the correct balance of money available.

Accommodations and other vendor inventories

Once you've successfully canceled all your attendee registrations and processed refunds to your event, you've finished the cancelation process in EventsAir. However, you still need to communicate with and manage contracts you have with your accommodation and other suppliers, but there really isn't a need to remove inventory from any of your functions or accommodation settings.