

# Creating an event – basic checklist

Last Modified on 02/16/2025 5:30 pm EST



Want to jump to a particular section? Use the contents tab to the right of this article

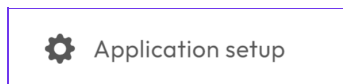
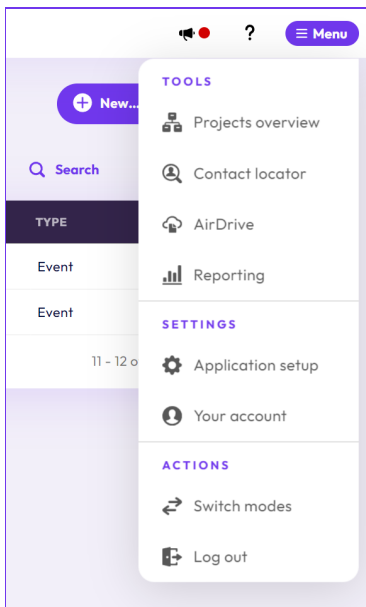
Here are the essential steps to setting up an event in EventsAir.

This is a **brief and very general overview** of the processes and steps you will need to follow, and you may add or remove steps if they don't apply to your situation.

To find more information about each step, you can:

- Search in this site for key terms (such as "Application Setup")
- Refer to your Fast Track course
- Check our FAQs; and/or
- Contact your EventsAir account manager for further training.

## Step 1 – Define your overall EventsAir application settings



Before creating an event, open Application Setup to configure global settings that will apply to all of your events. The **most frequently** used settings in this section are:

- **Event Groups** — create categories of events such as sales meetings, user conferences, training events and much more.
- **Text Message Gateway** — to send texts from EventsAir, you'll need to enable this and subscribe to one of the supported services.
- **E-Commerce Gateway** — you'll need to use one of the many options supported by EventsAir. If you use a gateway not currently supported, you may need to order a custom-created gateway. Alternatively, you can change your service to one of the supported gateways that work with your merchant account.
- **Users** — create accounts and define roles and rights for people within your organization who'll use EventsAir.
- **Currency Library** — define various global currencies, and is used in the multi-currency feature of EventsAir.
- **Other Libraries** — you may want to include other libraries here such as hotels, ports, carriers, country lists, and dietary requirements, to be able to use these across your events.

## Step 2 — Create a new event



This is the first step you need to take in creating a new event.

You'll add your **Event Details** — essential information such as name, type (event or contact store), time zone and more.

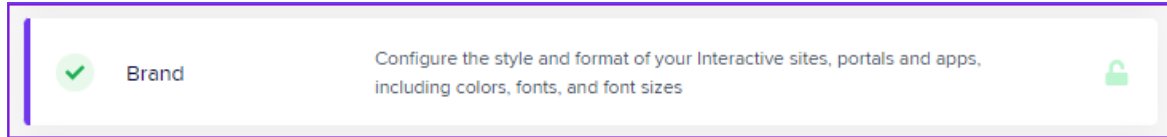
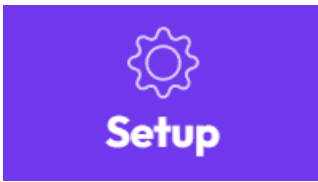
Set the event **Access Rights** — select if everyone on your team can access your event or only selected users.

Other popular features in this section are:

- **Invoice Header** — enter Tax Number and other details here that are specific to this event
- **Contact Store** — you can associate one contact store to this event
- **Clone From** — you can clone an entire event (minus contact records and date-specific items)
- **E-Commerce Account** — you can associate a previously defined e-commerce account to this event
- **Modules** — this is where you can turn off any modules you do not plan on using.

**NOTE:** If you want to keep your interface simple, you can disable modules now (but they can't be turned off after the event is created). You can, however, add modules later. Also, you don't need to use a module just because it's enabled.

## Step 3 — Create your event brand

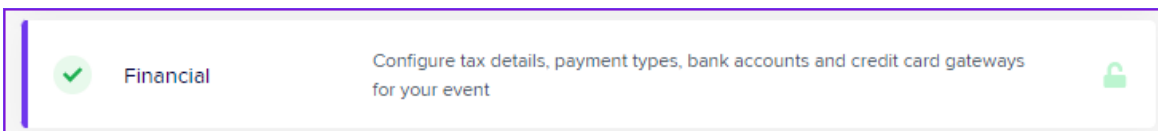
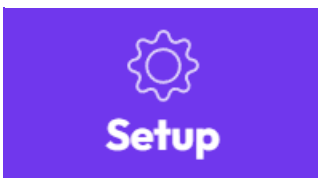


Navigate to the Setup Panel and choose **System Setup, Brand**:

This is where you can define the look and feel of your websites, emails, surveys and more. You can also create multiple brands, allowing you to change brands in a matter of a few seconds. Items you can define include:

- **Details** — preset color combinations and various images for headers, footers and website favicons.
- **Customize Style** — this is where you can define fonts, font sizes, and various color settings for fonts, page backgrounds and more.

## Step 4 — Define taxes and payment types for this event



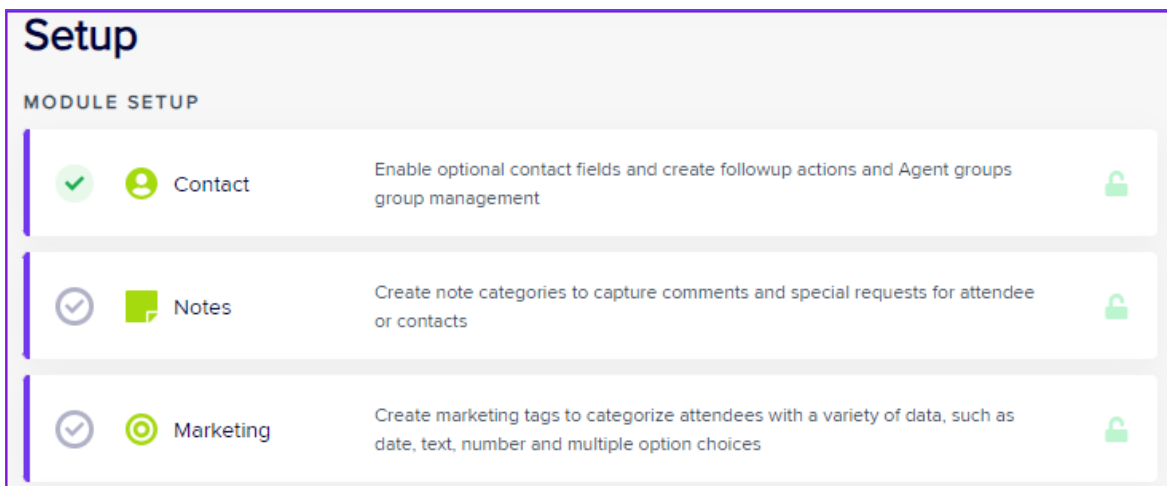
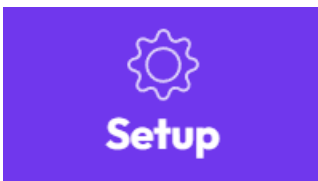
**You should define Taxes and Payment Types before setting up the rest of your event. Adding these details later may require a lot of manual adjustment.**

Navigate to the Setup Panel and choose **System Setup, Financial**:

- **Taxes** — if you are going to collect taxes such as GST or hotel taxes, you can define multiple tax types here.
- **Payment Types** — if you're going to collect payments for this event, you must define those payment types at the

beginning of your setup.

## Step 5 — Set up Contacts, Notes and Marketing Tags



In the Setup Panel, you can access Contacts, Notes and Marketing and configure these settings as needed. Items you can define include:

### Contact:

- **Custom Fields** — in Preferences, you can select and customize some contact custom fields. [Custom Fields for other modules are set up separately.]
- **Dietary Requirements** – if needed, select one or more of the dietary requirement lists you've created in your Application Setup Libraries.
- **Contact Action** — for your internal use, to create a dropdown list of follow-up actions in contact records. You can use this feature so your team can track workflows and next steps inside the contact record. You can also run a report on these actions.

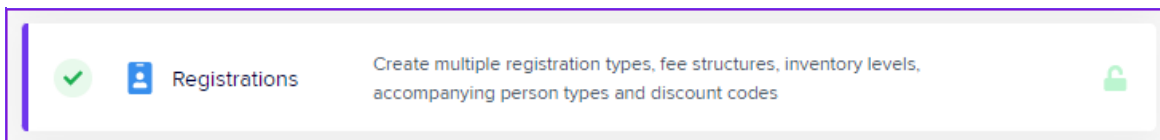
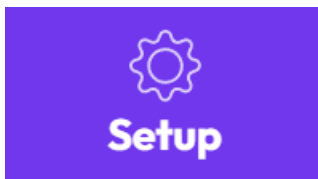
### Notes:

“Notes” can be supplied by the attendee during registration, or added by you in the Attendees Panel (in the person's Contact record). You give each note type a name, such as special requests, phone log, email log, etc. Each note type offers a handy way to record particular attendee information and retrieve it later.

## Marketing:

You can create marketing groups and, under each group, marketing tags. These are extremely valuable, and can be used to gather all kinds of background or marketing information about your attendees, such as company size, region, previous conference attendance, membership, annual revenue, specialization, accreditation, or just about anything you could imagine. These questions are useful for analyzing your event demographics and for searching/filtering when you are communicating or marketing to attendees.

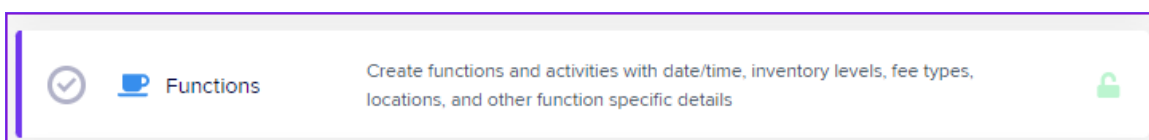
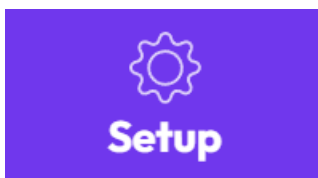
## Step 6 — Set up the Registration module



There are three general areas you can set up in Registration:

- **Registration Groups** — these create broad categories to help you organize a large number of Registration Types. For example one-day registration categories and multi-day registration categories.
- **Registration types** — these define more specifically who'll be attending your conference. You can assign a fee to a registration type, or make it a no-charge fee type. You can also define an inventory (how many of each type), and set system alerts based on inventory levels.
- **Discount Codes** — these are the percentage-off or dollar amount-off details for providing discounts to your attendees.

## Step 7 — Set up the Functions module



Functions are any activity, meal, social activity or event that you want attendees to sign up for, and optionally, pay a fee to attend. Areas you can define include:

**Preferences** – Set your Table Allocation preferences such as measurement (metric or US) and colors for various seat allocation statuses (available, allocated, blocked, or highlighted).

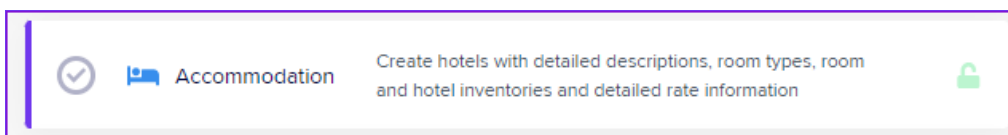
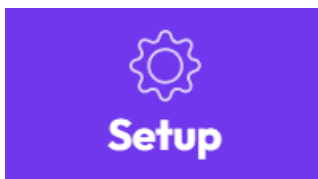
**Payment and Cancellation Policy** – this where you can add in payment schedules, terms & conditions; and/or add a cancellation policy.

**Function Group** – organize and categorize your functions, such as social activities, meals, optional tours, inclusive activities, etc.

**Function** – Within each function, you'll set up all the details such as date and time, inventory (how many places/seats/tickets), AV requirements, sponsors, and more.

Popular tools here include Table Allocation; settings to record guest names and/or create linked records, discount codes and more.

## Step 8 – Set up Accommodation (if required)



You can set up one or more hotels here. Each hotel can have many items created and defined including:

**Preferences** – This where you can enable features such as management of deposits, variable sub block rates, must-stay nights, manual override, and collecting transfer information (inbound and/or outbound).

**Payment and Cancellation Policy** – this where you can add in payment schedules, terms & conditions; and/or add a cancellation policy.

- **Hotel Details** – basic contact information for each hotel
- **Hotel Information** – items such as photos, Map Link URLs, ratings, distances and Hotel Terms and Conditions are entered here
- **Inventory** – this should mirror your actual hotel contract. This is where you can define inventory levels by hotel, alerts, and room block numbers by dates. You can turn on sub blocks here as well.

Once you define your hotels, you will need to define Room Types. Every hotel must have at least one room type defined for it. Settings for each room type should include:

- **Room Details** — such as room name, description and photo
- **Inventory and Rates** — there are lots of settings to consider, such as fixed or dynamic room rates, room inventory (as opposed to hotel inventory), alerts and minimum night stays
- **Itinerary** — this is a text field use to collect additional itinerary information against this room type

**Sub-blocks** – if enabled, you can use this feature to create sub blocks such as for staff rooms or special blocks for groups attending your event.

**Accommodation Discount Codes** – you can create hotel discount codes and set parameters for their use.

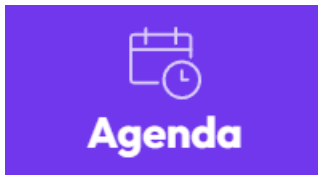
Other modules: If available in your subscription, may also wish to set up Travel, CE Courses, Presentations, Exhibitions or Sponsorships.

The Setup Panel is also where you can add event-specific Custom Fields, create Packages, and set up Accounting Features.

It's also where you create Survey questions.

Please search in this site for information on these items.

## Step 9 — Build an Agenda

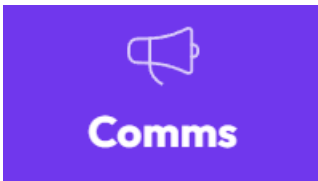


Using the Agenda Panel (and/or Presentations in the Setup Panel), you can create a detailed Agenda with general sessions, break-out sessions, functions, activities and general information.

Once you finish creating the Agenda, you can publish it in numerous places, including your event website, Merge Docs and the Attendee Mobile App (see more on all these below).

When you make changes to the Agenda, it will update instantly in the published locations.

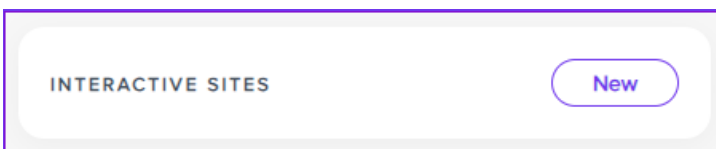
## Step 10 — Create a Merge Doc



Once you've set up your modules, you need to create a Merge Doc for any confirmation emails you want to be sent to people who register on your online site (more on that shortly).

- Navigate to the **Communications [Comms] Panel**, and in the **Merge Docs** section, select **New**.
- Define your Merge Doc name and brand, then create your Merge Doc by dragging and dropping in relevant sections.
- You can expand any of the builder elements to write text, change headers/footers, and include merged data.
- You can also define a link to a registration site using the Add Auto Login Token function.
- You can also include attachments, invoices, receipts and custom HTML or text by dragging the appropriate builder element from the left side.

## Step 11 — Create an interactive registration site



Now you're ready to build an interactive registration site.

Selecting **New** in the Interactive Sites section of the **Online Panel** gets you started!

You'll first create a site title and alias, add your chosen brand (set up earlier in Step 4), and possibly clone from a pre-existing site if you have one.

Next, create the content using drag-and-drop builder elements:

- Drag the builder elements in and move them around as required
- Navigate to the individual elements under Contact, and define any additional dropdown menus and required



fields. Also remove any contact fields you don't want to display on your form/site.

**NOTE:** This is where you'd add the dietary requirements element if you're using it – enable this under the "Details" tab, then add it into the Contact section.

- Review all sections you've selected and remove any items you don't want to display
- Add page breaks, images, text or custom HTML as required
- Add Summary and Payment elements if required
- Edit your 'Thank You' page text

Once you've built the essential structure of your interactive (registration) site, click on the Details Tab to define additional items, including:

- Custom Button Text (if needed)
- Site Availability
- Under the Confirmation tab, add the Confirmation email or Merge Doc you created in the previous step.

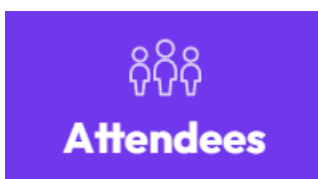
You can also define site open or closed messages in the Messages Tab and define language translation in the Localization Tab.

When you're ready to preview and test your site, select Save & Preview. You can also click on the URL displayed in the Details Tab.

Always test your sites extensively before you go live, and remember to delete or make inactive any test registrations you've created.

*As part of your event marketing, you may want to create a non-interactive event website, to promote your event, give details of the program and guest speakers, and other relevant information (you can link from here to your interactive registration site). You can create your event website from the Online panel.*

## Step 12 – Open registration and manage attendees



Once you've created your interactive registration site, you're ready to go live and open registration for your attendees.

Be sure you've cleared out any test registrations, your merchant account is in live mode and your team is ready to start fielding inquiries.

When registrations are processed, you'll see them in the **Attendees Panel**. This is where you can search for all registrations or by specific filters.

Areas of the Attendees Panel you should be familiar with include:

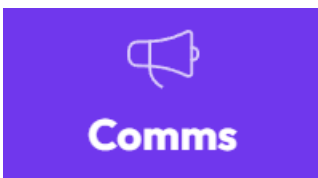
- Recent and Pinned
- Data Processing Log & Access Log
- Add Contact

You'll also want to be familiar with **searching** and **filtering**.

Remember also the Actions, located under the "Actions" button to the top right of the Attendees Panel:

- **Search** — your Attendees Panel will open in Search mode by default.
- **Financials** — this is where you process payments, refunds and generate invoices.
- **Communications** — this is where you can communicate with individual attendees via ad-hoc emails, merge docs, text messages and more
- **Linking** — this is where you link records to groups or create a "Group Contact". *Search this site for more information on Group management.*
- **Print Personalized Documents** — this provides you with a select of useful print outputs, such as address labels, certificate of attendance, and other print output useful when working with individual attendees.
- **Change Log** — provides a detailed log of changes to an attendee record.
- **Tools** — useful tools such as auto login tokens, replace attendee, and more.
- **Attendee Delete** — this is where you can delete an Attendee record as long as there are no payments or financial transactions on that record.

## Step 13 — Manage communications



Once registrations are coming in, you will want to communicate with all, or subsets of, your attendees.

Use the **Communications panel** to create Merge Docs and use the Send Communications or Planned Communications features to select attendees to communicate with and send out communications.

(You can also send messages via the Attendee App.)

The Communications panel is also where you set up attendee and organizer alerts and news updates.

You can build and send Surveys, based on questions you defined previously in the Setup Panel.

It's also where you manage EventStream, the in-event social media platform with points/badges/rewards features.

## Step 14 — Define project tasks



Map out broad tasks and deliverables with the EventsAir Project Manager. Completely integrated throughout the platform, the tool lists tasks, dates, and deadlines to keep track of how the event is progressing.

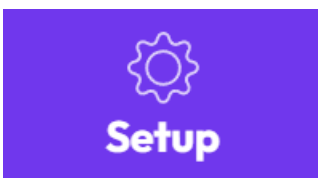
When you add a new Project, you'll see:

- **Details** – Add a description, nominate Project Managers, add a notes, enable milestone increments, and email task reminders.
- **Quick Edit Icon** – on the left of each task line you will see the Quick Edit icon. Clicking on this will let you perform the following tasks:
- **Project items** – insert your Projects and Tasks here

Projects are the primary tasks for your event, and are comprised of multiple tasks underneath it. Tasks are individual assignments underneath a Project, and for each Project or Task, you can see:

- **Team Members** – all assigned Teams Members will be shown here
- **Status** — lets you set the starting status for each task

## Step 15 — Create name badge templates



As you approach your conference or event, you'll want to start planning for and testing your name badges. The Name Badge Editor in EventsAir is part of the Reporting System and can create a fully customized name badges and other collateral materials.

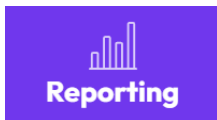
There are two steps to creating a name badge: **creating** and **printing**.

Create your name badge layout in the **Name Badge Editor**, found in **Setup Panel**.

You can print individual badges from each Attendee's record, or you can print them all in advance from **Express**

**Actions**, or you can print badges on-demand when you're onsite, using self-check-in or onsite portals. Be sure to always test well in advance.

## Step 16 — Use Reports, the Event Dashboard, and Alerts



The Reporting Panel is a comprehensive reporting system that lets you access and customize many dozens of pre-built reports as well as create custom reports for your specific requirements.

There are ways to leverage the power of EventsAir reporting:

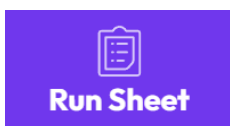
- **Previewing and Exporting Reports** — Selecting Preview lets you view the report on your screen, and choose from numerous export and print options.
- **Generating Quick Reports** – Quick Reports are a great way to create a pre-filtered and accessible report that you can share with vendors, clients and other authorized parties via a website link. These pre-filtered reports are also extremely useful when creating filtered versions of existing reports.
- You can also use the **Data Validation** filters (in the Attendees Panel) and **Duplicate Finder** (in Express Actions) to double-check for any missing or conflicting items.

Your event **Dashboard**, and the **Alerts** panel, also help you keep an eye on vital metrics and anything urgent that needs your attention.

[Read more about the Event Dashboard.](#)

[Read more about the Alerts panel.](#)

## Step 17 — Prepare to manage onsite tasks with Run Sheet



Your Run Sheet is your on-the-ground roadmap for what needs to get done before, during, and after your meeting or event. This is a smart alternative to an old-fashioned multi-page spreadsheet which is unwieldy and hard to keep updated.

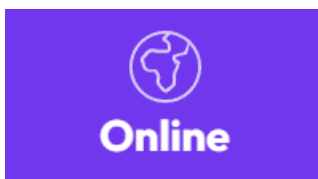
Manage all of micro-tasks needed to successfully deliver your event, with a list of tasks allocated to which team members, showing exactly what needs to be done, where and when. As tasks get completed, they're checked off and the Run Sheet updates instantly.

The Run Sheet appears in Mobile Organizer App (which you can access on any computer or mobile device), so you can monitor exactly what has or has not been done in real time.

When setting up Run Sheets, you can add tasks and manage the following items:

- Task name and location
- Link to an agenda item or CE Course
- Add team members
- Set Status
- Define start and end dates and times
- Set a priority for this task

## Step 18 — Create an Attendee App



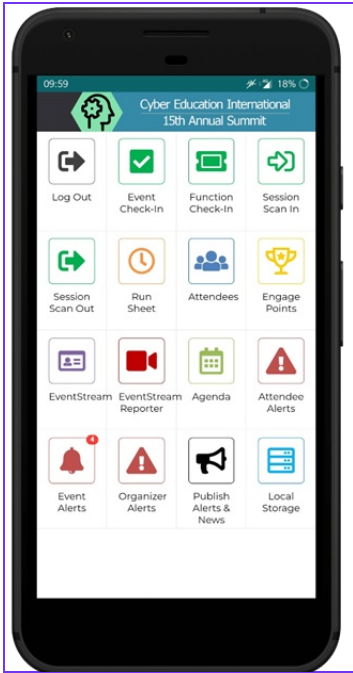
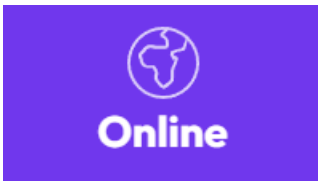
The Attendee App allows you to communicate directly with all attendees or selected attendees. You can build your app in a short amount of time and create a custom app experience for your attendees. The mobile attendee app also lets your onsite attendees connect and communicate with your virtual attendees when your event includes both types of attendees (hybrid event).

You can control the navigation format and edit icons and settings across the entire app.

Your Attendee App can give your attendees instant access to:

- Attendee, Exhibitor, Speaker and Sponsor searches
- Meeting Matching Diaries
- Agendas and customized My Agendas
- Alerts and messages
- Meeting hub for attendee-to-attendee connections and communications
- Twitter feeds
- Static content for custom communications
- Advertising

## Step 19 — Create an Organizer App



Your Organizer App makes it easy to manage your event while onsite, including being able to keep track of your Run Sheet, see last-minute agenda changes, check-in attendees and much more, including alerts, news, and gamification tools.

You build your Organizer App from within the Online Panel, using drag-and-drop elements.

Popular features include:

**Event Check-in, Function Check-in, Session Scan In and Session Scan Out** (so that you can do all these things on the fly at the event, using your phone or tablet).

**Attendee management tools** such as being able to add a photo, search by name, send alerts and add rewards points.

**Project management tools** such as Run Sheet, Quick Reports, Team News and Organizer Alerts.

If you choose to, you can grant additional access to the Organizer App to people you've set up as Team Members in Setup Panel, under Project Manager.

## Step 20 — Use Express Actions to complete common tasks quickly



Tackle a wide variety of common tasks quickly, using the Express Actions panel. You'll find many options such as bulk data changes and exports, processes such as Auto Event Check-in set up, allocating tables or exhibition stands, issuing invoices, releasing rooms from hotels, and much more.

Again, for detailed information on all of these and more, please search for the relevant keywords on this help site.

You can also learn more via your Fast Track training, by coming along to our webinars, searching our FAQs, and talking to our Customer Success team about more training on specific areas.

---