Setup Panel (set up your event)

Last Modified on 06/03/2024 6:03 am EDT

The Setup panel is the 'last' panel in the event panel menu, but the one you'll go to first when setting up your event.

In the Setup panel, you create and define the settings that will customize your event. Here's where you create the 'look and feel' of your event, define overall preferences, and set up each module. You'll be able to add Registration Types, Marketing Tags, Travel sectors, Sponsorship packages and more, all ready to be applied throughout your event.

What are all these Lock/Unlock Symbols? If you are seeing these, then your user login has Administrator rights, or has explicitly been given permission to lock areas of the Setup Panel. Once locked, other users cannot change anything in these areas (unless they have been given the same permissions). This can help stop inexperienced users making unwanted changes in your carefully-configured setup.

There are three sections in the Setup panel:

System Setup

- Event
- Brand Editor
- Financial

Advanced Setup

- Accounting
- Packages
- Project Manager
- Run Sheet
- Name Badge Editor
- Custom Fields

Module Setup

This is where you'll set up each module required for your event, including:

- Contacts
- Notes
- Marketing
- Survey
- Registration
- Functions
- Accommodation
- CE Courses

- Travel
- Presentations
- Exhibitions
- Sponsorship