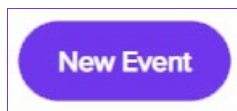


Create an event (settings)

Last Modified on 05/15/2024 7:54 pm EDT



From the opening screen, selecting the **New Event** button (top right corner) will open the New Event setup panel.

This where you create and define the settings for one specific event. Many other aspects of your event (such as Language, Currency, E-Commerce Gateways, Google Analytics, etc.) are configured for ALL your events (in [Application Setup](#)) and must be set up before working on a specific event.

You'll start by defining various aspects, including:

- Details (name, dates, location etc.)
- Modules (which modules you want included)
- External Connections (various external connections you'll need to run your event)
- Access Rights (if you have multiple users)
- Invoice header (you can add and edit details)
- Custom Fields

Editing an existing event's settings

You can come back to update or review your event settings later within your event, via the [Setup Panel](#) (under SYSTEM SETUP – Event, then under Preferences).

Details

The following options are available when you create a new event:

- **Name** – name of your new event
- **Event Type** – choose one of the following:
 - Event
 - [Contact Store](#)
 - [CE Contact Store](#)
 - Member Contact Store

Tip: Once defined for this event, these settings cannot be changed.

- **Start and End Date** – enter the start and end dates of your event
- **Event Location Time Zone** – for automatic date/time offset calculations
- **Event Currency** – sets the default currency for this event

Tip: Once defined for this event, these settings cannot be changed.

- **Enable Multi-Currency** – this option turns on multi-currency, so you can assign multiple currencies to payable items and create interactive sites and merge docs in different currencies
- **Office** – if you have enabled the optional **Office** feature (managing multiple office locations), you must assign this event to a specific office
- **Clone From** – this option lets you copy an entire event setup from an existing event. (No contact records or financial information will be copied over.)
- **Event Group** – if you created an Event Group item in System Settings, you can enter it here
- **Venue** – where your event is being held (venue)
- **City, State, Country** – where your event is being held (geographic location)
- **Alias** – you can assign a simple URL alias (e.g. webmarketing2026 instead of Web-Marketing-Conference-2026), you can enter it here

Tip: Remember that this alias will be visible to end users as part of the URL for all websites.

- **Contact Store** – if you have created an EventsAir **Contact Store**, you can link that Contact Store to the new event you're creating

Tip: Once you set the Contact Store in Event Setup, it can't be changed, so be sure to select the correct one.

- **Event Logo Image** – you can upload your event logo here. It will be resized to 400 pixels wide, so an image that is roughly square looks best.
- **Optional services** – add other services you need for this event (and accept any additional costs)

Modules tab

You can select which modules you want active in this event. (Once you build your event, you can't change these module selections.)

External Connections tab

Settings for this event's external connections are here, including:

- **Analytics Account & details** – you can enter your Google Analytic account information for this specific event
- **Facebook** – link to the Facebook account you use to promote your event.
- **Twitter & Twitter (search)** – link to your event's Twitter (X) account
- **Text Message Gateway** – select a gateway from those you've set up – you'll need this if you want to send SMS text messages

- **E-Commerce Account** – select the desired E-Commerce account for this specific event
- **E-Commerce Reference** – enter a brief phrase here – any charges coming from this event will show this phrase in your gateway/merchant account
- **PayPal Account** – select the desired PayPal account, for this specific event
- **E-Commerce Test Mode** – check this box if you want to process test registrations instead of live ones
- **Send Email From** – this option lets you select the default email account that all emails will be sent from
- **Email Account** – If you have set up one or more Email External Accounts in Application Setup, these accounts will be visible here. This option lets you assign a different SMTP Email Server to use with your email communications in EventsAir.

Access Rights tab

In the Access Rights tab, you have two options:

- Allow all users to access this event
- Allow selected users to access this event

This is very useful when you're working with clerical staff or temporary employees for your event and want to make sure their access is appropriate.

Invoice Header tab

Enter the event-specific Tax Number and other details for your company here. These details will be automatically applied to the layout of your invoices and receipts.

Tip: Set this up before you start creating invoices. Once an invoice is issued, it cannot be legally changed – a new invoice would have to be issued.

Custom Fields tab

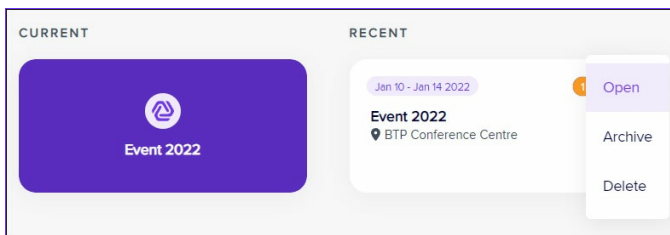
In this tab, you can select any pre-defined custom fields you already created in the Application Setup.

Now that you've created your event...

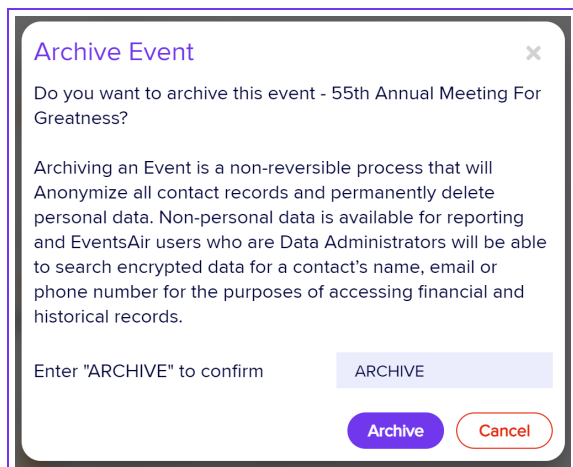
...You're ready to set up all your event's modules and preferences. [Find out more in this section.](#)

After your event – archiving or deleting

From the opening screen of EventsAir, select the hamburger icon [three horizontal lines] for the event you'd like to delete and you have the option to open, archive, or delete the event.

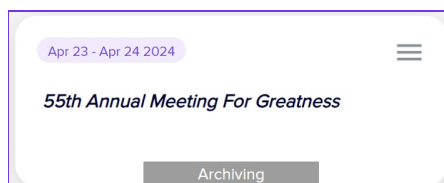
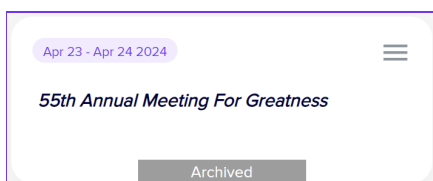


When an event is archived, all **attendees** are anonymized and all personal data in the event will be permanently deleted. The attendee's name, email and phone number is permanently encrypted, allowing for a record search only by an authorized Data Administrator. **This often forms a key part of your data protection processes.**



To archive an event

1. From the Event Selection Screen, select the Menu in the top right corner of the Event Box and "Archive".
2. If you're sure, enter ARCHIVE in uppercase letters and then press the Archive Button.
3. Your Event Box will display an Archiving Notification. Once Archiving is complete, the notification will change to Archived.



Important, Please Note: Once an event is archived, the process cannot be reversed — this is a **permanent** process. Also, event archiving may take many hours. Until archived, the event display will show a gray “Archiving” label. When completed, the event display will show a gray “Archived” label.

Searching for an archived event

An event that is archived will be removed from the display and search functions in the Event Selection screen.

However, you can opt to include an archived event when using the event filter option in the search window.

Deleting – use extreme caution

Once deleted, the entire event and all information and settings **will be removed and cannot be retrieved**. Exercise caution!

Tip: It is recommended to perform a comprehensive data export of all your event data. You can choose to export any or all data you need for backup from [Comprehensive Export](#), found in Express Actions.
