How to update the event settings

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The Event Settings are used to manage various aspects of the events such as the event currency, registration email templates, and more.

You can update the Event Settings with the steps below:

1. Click **Events** or the **Calendar** icon on the left menu.
2. Click **Manage** on the event you would like to edit the settings for.
3. At the top right of the event, click **Setup** or **Gear** icon.
4. Near the top of the events page, click **Settings**.
5. The Event Settings page is broken down into the following sections:

    - Currency: Refers to the currency that registrants will submit their payment in.
    - Payment Options: Payment options for the registrants. Eg. Pay by credit card, pay by check, pay later.
    - Public Registration Settings: Registration options to allow general public to edit their registrations, and have members view other attendees.
    - Administrator Registration Options: Registration options for when an Administrator registers a member.
    - Email Notification Templates: Email notifications used for successful registrations, payment received, cancellations and more.
    - Event Reminders: Emails to remind registrants and attendees about the event.
    - Success Message: Messaging that appears when a registrant successfully registers.

To edit the sections in the Event Settings, please use the article sections below.

Currency

1. In the Currency section, click **Edit.**
2. In the Update Currency pop up, click the **Event currency dropdown**, then select the new currency for the event.

3. Click **Save.**

Note

Learn more about the account's Finance Settings and adding more supported currencies.

Payment Options

1. In the Payment Options section, click **Edit.**
2. In the Update Payment options pop up, you will have these options:
    - **Allow credit card payments** - Check this box to enable credit card payments. If enabled, you can select the default payment account, or select another payment account for the event's credit card payments.
    - **Allow check payments** - If enabled, registrants can select a Pay by Check option, to complete their registration and see the Pay by check instructions to submit payment.
        - **Add Service to all registrations -** A service fee allows you to help offset the cost of the transaction from the payment processor. These fees are applied to the total order value when paying online during checkout.
    - **Pay by check instructions -** Instructions for registrants paying by check.
    - **Allow bill me later** - If enabled, registrants can select Bill me later option, to submit payment for the registration at a later date.
    - **Bill me later instructions -** Instructions for registrants paying later.
    - **GL Account -** A drop down which allows you to select which GL Account.
3. Click **Save**.

Public Registration Settings

1. In the Public Registration Settings section, click **Edit**.
2. In the Update Public Registration Settings pop up, you can enable or disable these options:
    - **Allow attendees to edit registration** - This will allow attendees edit their registration by logging in, if they have a profile in the account.
    - **Allow members to view attendees list** - This will allow members to view other attendees when logging into the account.
3. Click **Save**.

Administrator Registration Options

1. In the Administrator Registration Options, click **Edit.**

2. In the Update Administrator Registration Options pop up, you can enable or disable these options:

    - **Send all email notifications when the administrator registers someone on their behalf** - This will enable email notifications to the attendee, buyer and event organizer as specified in the email notification templates section.

    - **Send invoice to the buyer when the administrator registers them on their behalf** - If enabled, the buyer entered on the order will receive the invoice email for the order once the administrator has registered them on their behalf.

3. Click **Save.**

Event Notification Templates

1. In the Email Notification Templates section, click **Edit**.

2. In the Update Email Notification Templates pop up, you will have these options:

    - **Attendee About Successful Registration** - Send email to Attendee regarding their successful registration.

    - **Ticket Buyer About Successful Registration** - Send email to Ticket Buyer regarding their successful registration.

    - **Event Organizer About Successful Registration** - Send email to Event Organization regarding any successful registration.

    - **Attendee About Ticket Cancellation** - Send email to Attendee regarding their ticket cancellation.

    - **Ticket Buyer About Ticket Cancellation** - Send email to Ticket Buyer regarding their ticket cancellation.

    - **Event Organizer About Ticket Cancellation** - Send email to Organizer regarding any ticket cancellation.

    - **Attendee About Order Cancellation** - Send email to Attendee regarding their order cancellation.

    - **Ticket Buyer About Order Cancellation** - Send email to Ticker Buyer regarding their order cancellation.

    - **Event Organizer About Order Cancellation** - Send email to Event Organizer regarding an order cancellation.

    - **Attendee About Issued Refund** - Send email to Attendee regarding their refund for the order.

    - **Ticket Buyer About Issued Refund** - Send email to Ticket Buyer regarding their refund for

the order.

- **Event Organizer About Issued Refund** - Send email to Event Organizer regarding a refund for any order.
- **Attendee About Payment Received** - Send email to Attendee regarding their payment received for their order.
- **Ticket Buyer About Payment Received** - Send email to Ticket Buyer regarding their payment received for their order.
- **Event Organizer About Payment Received** - Send email to Event Organizer regarding payment received for any order.

3. For any of the Email Notifications, you can use the first dropdown to select these options:
   - **System** - Select System to use the system default notification email.
   - **Custom** - Select Custom to use a custom email template. Learn more about creating and managing your custom email templates.
   - **-- Select Template Type --** - Select this option to turn off the notification email.
4. If you have selected **System** or **Custom,** click the second dropdown to the right, then select the email template to send for the notification.
5. Click **Save**.

Add Event Reminders

1. In the Event Reminders section, click **Add.**
2. In the Add Event Reminder pop up, you will have these options:
   - **Name** - The name of the Event Reminder.
   - **When?** - When, in days and hours before the event's Start Date, should the reminder email be sent to the Buyers and Attendees.
   - **Email Template**
     - **Select Template Type**
       - **System** - Select a system default email template for the reminder.
       - **Custom** - Select a custom email template for the reminder.
     - **Select Template** - Click this dropdown to select a system default email template, or a custom email template. Learn more about creating and managing your custom email templates.

- **Recipient Group**
    - **Orders** - Check this box to send the reminder to the Buyer.
    - **Attendees** - Check this box to send the reminder to the Attendee.
- **Active** - Check this box to activate the Event Reminder, and send the email reminders emails. If unchecked, the Event Reminder will not send the event reminder email.

3. Click **Save.**

Edit Event Reminders

1. In the Event Reminders section, click the **dropdown arrow** for the Event Reminder to edit.
2. In the menu, you will have these options;
    - **Edit** - Edit the Event Reminder's name, when it should be sent, email template, recipient group and if the reminder should be active.
    - **Make Active/Make Inactive** - This option will either activate or deactivate the Event Reminder.
    - **Delete** - Permanently delete the Event Reminder.

Success Message

If you want to customize the Success Message, use the steps below. Otherwise, the default Success Message will be used for the event.

1. In the Success Message section, click **Edit.**
2. In the Update Success Message pop up, enter the content for the success message into the editor textbox.
3. Click **Save.**

Note

You can add links and images into the Success Message.

Related Content

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