

# Creating an Event

25 Steps [View most recent version](#) 

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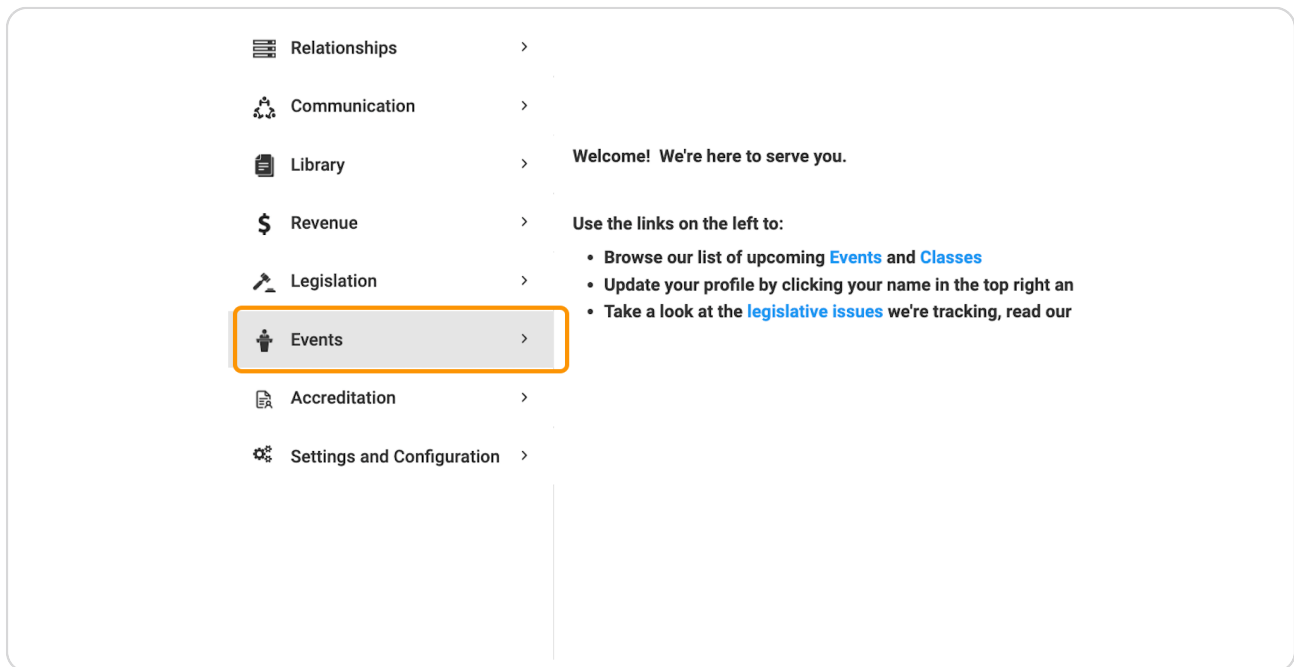
Created by  
Engagifii Inc.

Creation Date  
November 10, 2023

Last Updated  
November 13, 2023

## STEP 1

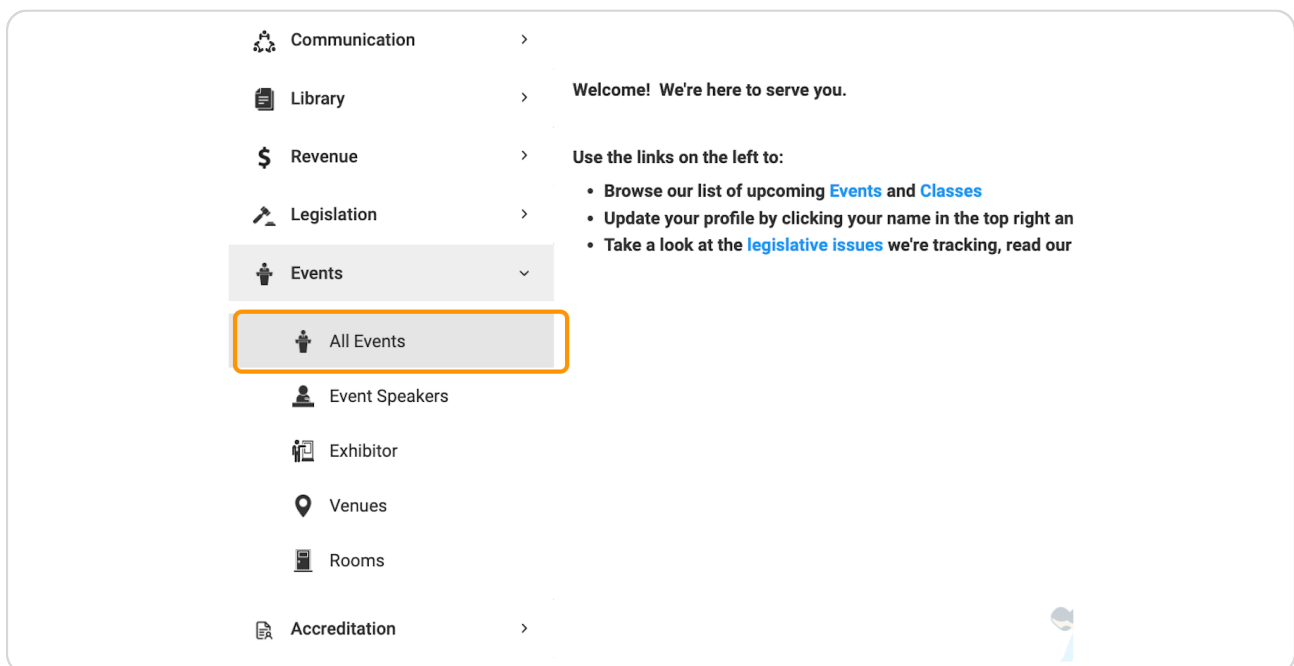
### Click on Events



A screenshot of a dashboard sidebar. The sidebar contains the following items: Relationships, Communication, Library, Revenue, Legislation, Events, Accreditation, and Settings and Configuration. The 'Events' item is highlighted with an orange border. To the right of the sidebar, the main content area displays a welcome message: 'Welcome! We're here to serve you.' Below this, it says 'Use the links on the left to:' followed by a bulleted list: 'Browse our list of upcoming Events and Classes', 'Update your profile by clicking your name in the top right an', and 'Take a look at the legislative issues we're tracking, read our'.

## STEP 2

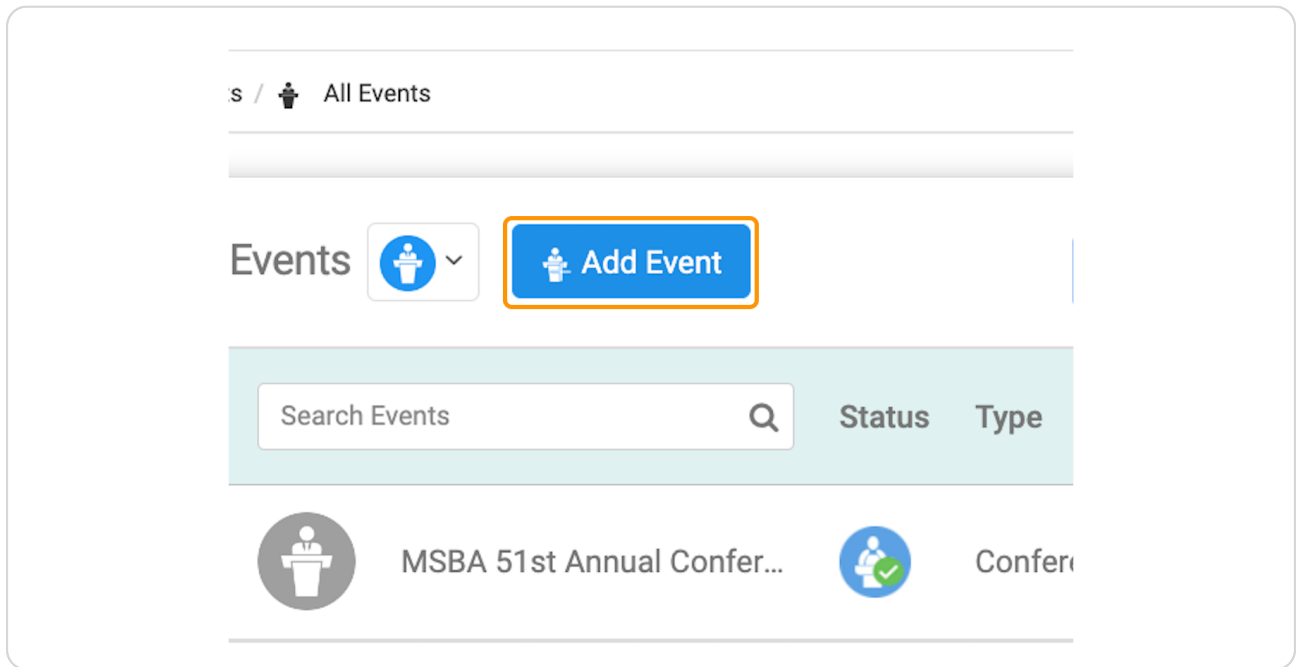
### Click on All Events



A screenshot of a dashboard sidebar. The sidebar contains the following items: Communication, Library, Revenue, Legislation, Events, All Events, Event Speakers, Exhibitor, Venues, Rooms, and Accreditation. The 'Events' item is expanded, and 'All Events' is highlighted with an orange border. To the right of the sidebar, the main content area displays a welcome message: 'Welcome! We're here to serve you.' Below this, it says 'Use the links on the left to:' followed by a bulleted list: 'Browse our list of upcoming Events and Classes', 'Update your profile by clicking your name in the top right an', and 'Take a look at the legislative issues we're tracking, read our'. A user profile icon is visible in the bottom right corner of the main content area.

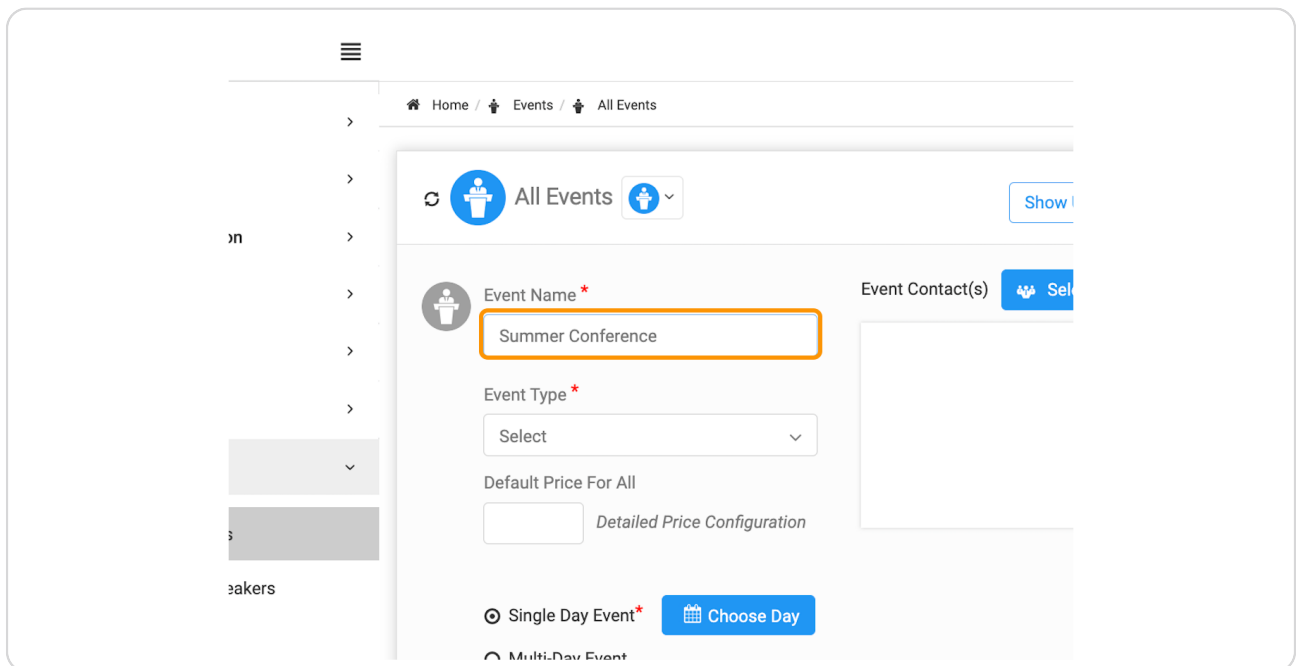
### STEP 3

#### Click on Add Event



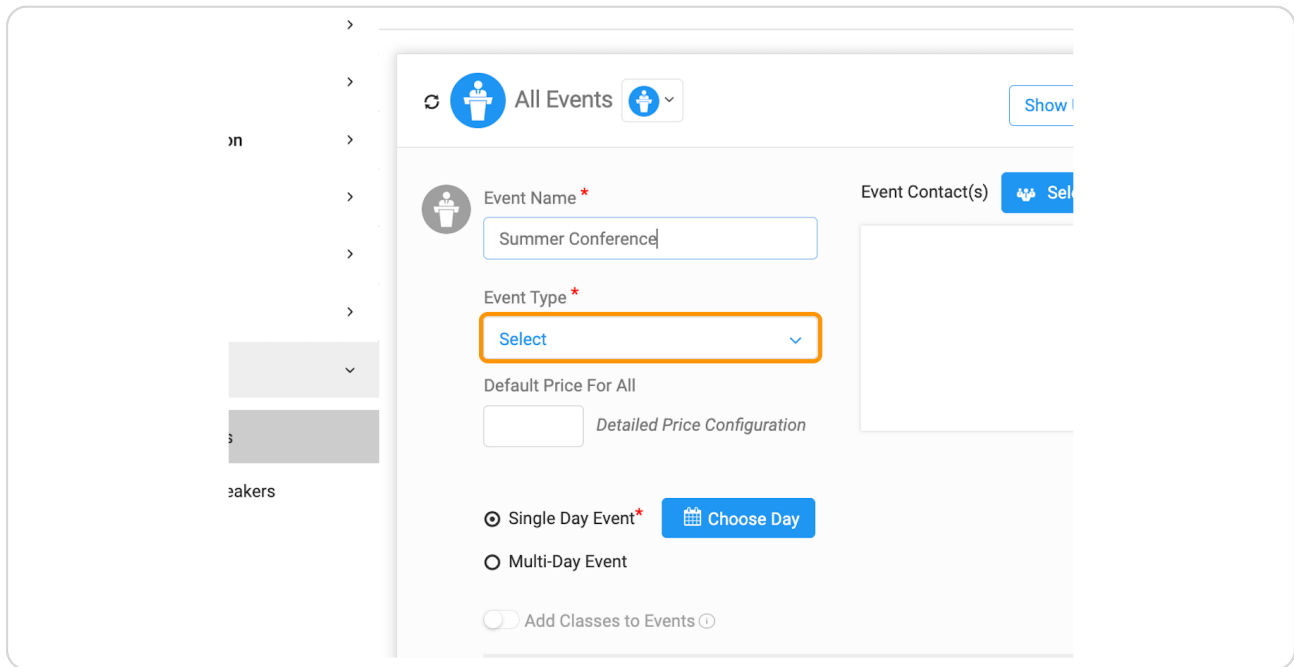
### STEP 4

#### Type the name of your event



## STEP 5

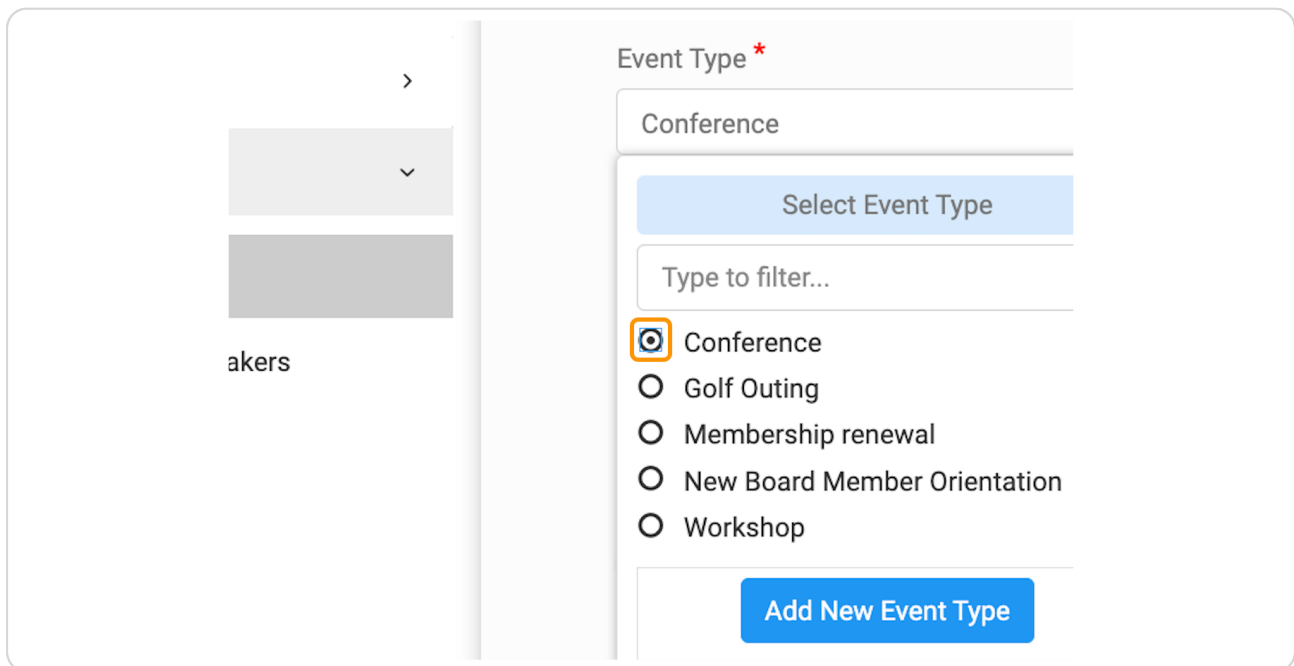
Click on dropdown arrow to select your event type



The screenshot shows a web interface for creating an event. The main form is titled "All Events" and includes a "Show" button. The "Event Name" field contains "Summer Conference". The "Event Type" dropdown menu is open, showing a "Select" option. Below this, there is a "Default Price For All" field and a "Detailed Price Configuration" link. The "Event Contact(s)" field is also visible. At the bottom, there are radio buttons for "Single Day Event" (selected) and "Multi-Day Event", along with a "Choose Day" button and an "Add Classes to Events" toggle.

## STEP 6

Select your event type from the list or add a new type



The screenshot shows the "Event Type" dropdown menu. The menu is open, displaying a list of event types: "Conference", "Golf Outing", "Membership renewal", "New Board Member Orientation", and "Workshop". The "Conference" option is selected, indicated by a radio button. A "Select Event Type" button is visible above the list, and an "Add New Event Type" button is at the bottom. A search bar with the placeholder text "Type to filter..." is also present.

## STEP 7

### Click on Single Day or Multi-Day Event

The screenshot shows the 'Summer Conference' configuration page. The 'Event Type' is set to 'Conference'. The 'Default Price For All' field is empty, with a link to 'Detailed Price Configuration'. The 'Multi-Day Event\*' option is selected and highlighted with an orange box, with a 'Choose Day(s)' button next to it. The 'Single Day Event' option is also visible. Below these options is a toggle for 'Add Classes to Events' which is currently off. A lightbulb icon and text prompt the user to 'To set up more details related to this event, please select the 'Save and Continue' button on the bottom right.' The bottom of the page features a navigation bar with 'Favorites', 'Search Events', and 'Status Type' filters.

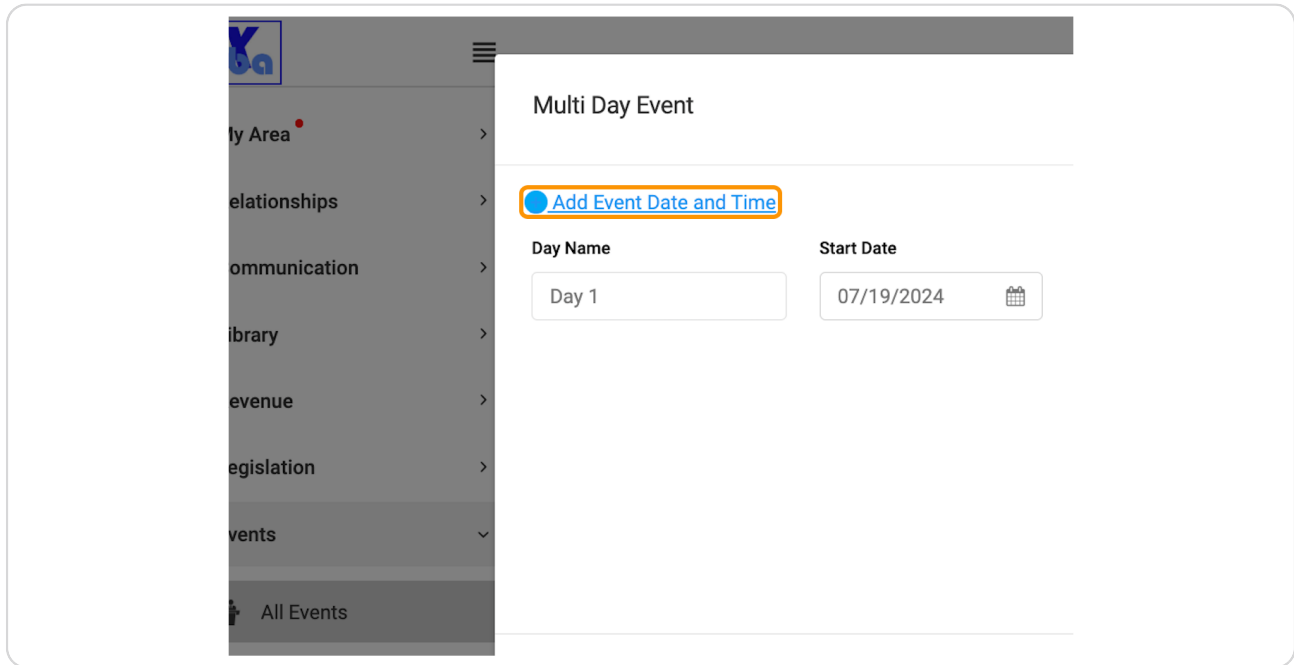
## STEP 8

### For Multi-Day, add your dates and times

The screenshot shows a 'Multi Day Event' dialog box. The 'Add Event Date and Time' section is active. A table with four columns is shown: 'Day Name', 'Start Date', 'Start Time', and 'End Time'. The first row is filled with 'Day 1', '11/10/2023', and time selection fields (AM/PM and hour/minute). The 'End Time' column is empty. 'Cancel' and 'Save' buttons are at the bottom right of the dialog. The background shows the same event configuration page as in Step 7, with the 'Multi-Day Event\*' option selected.

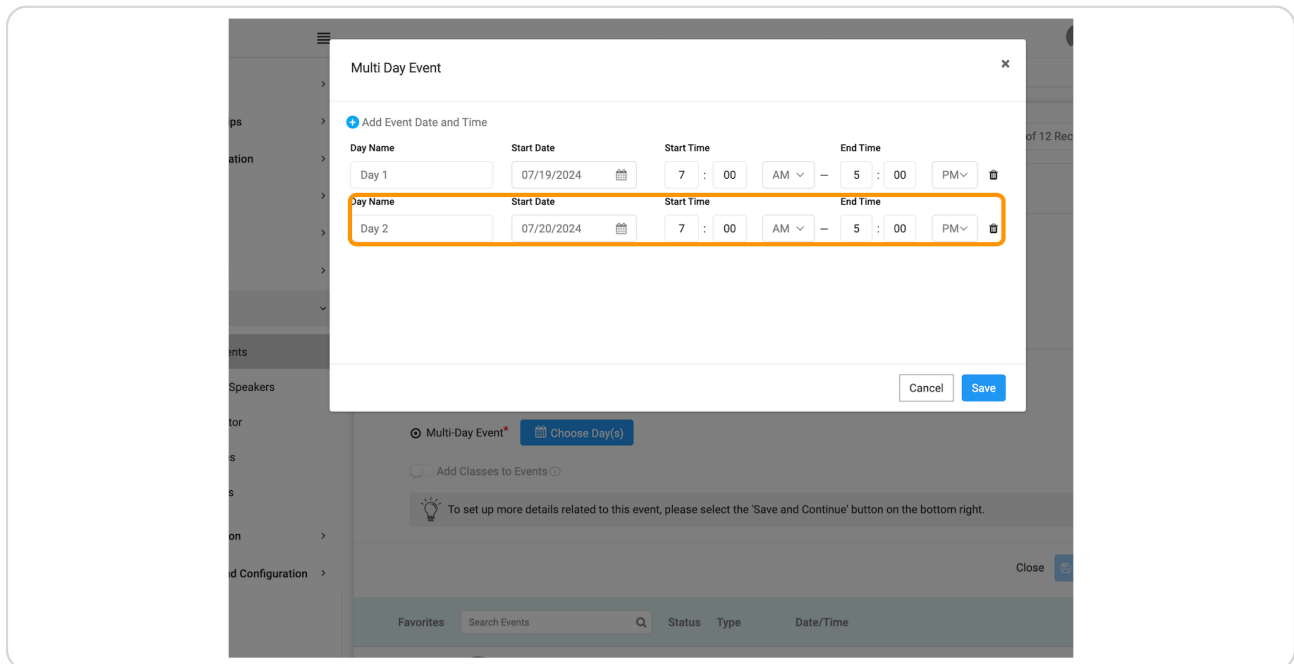
## STEP 9

Click on **Add Event Date and Time** to add additional dates/times



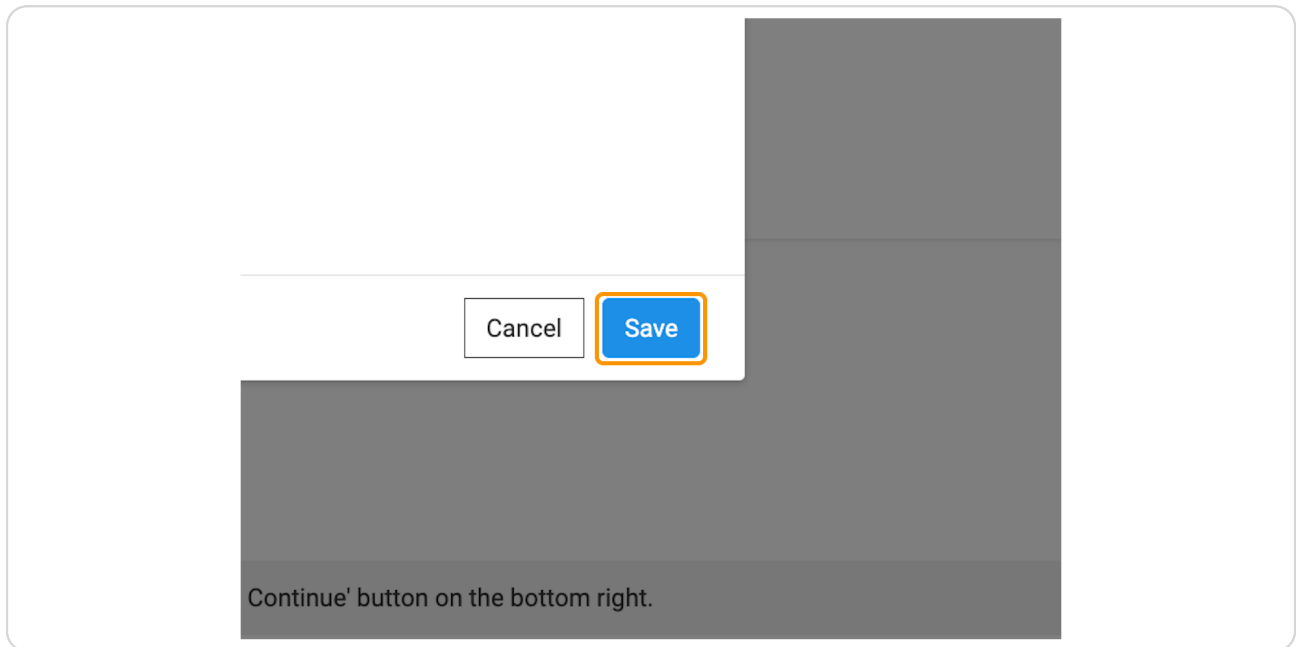
## STEP 10

Type "Day 2"



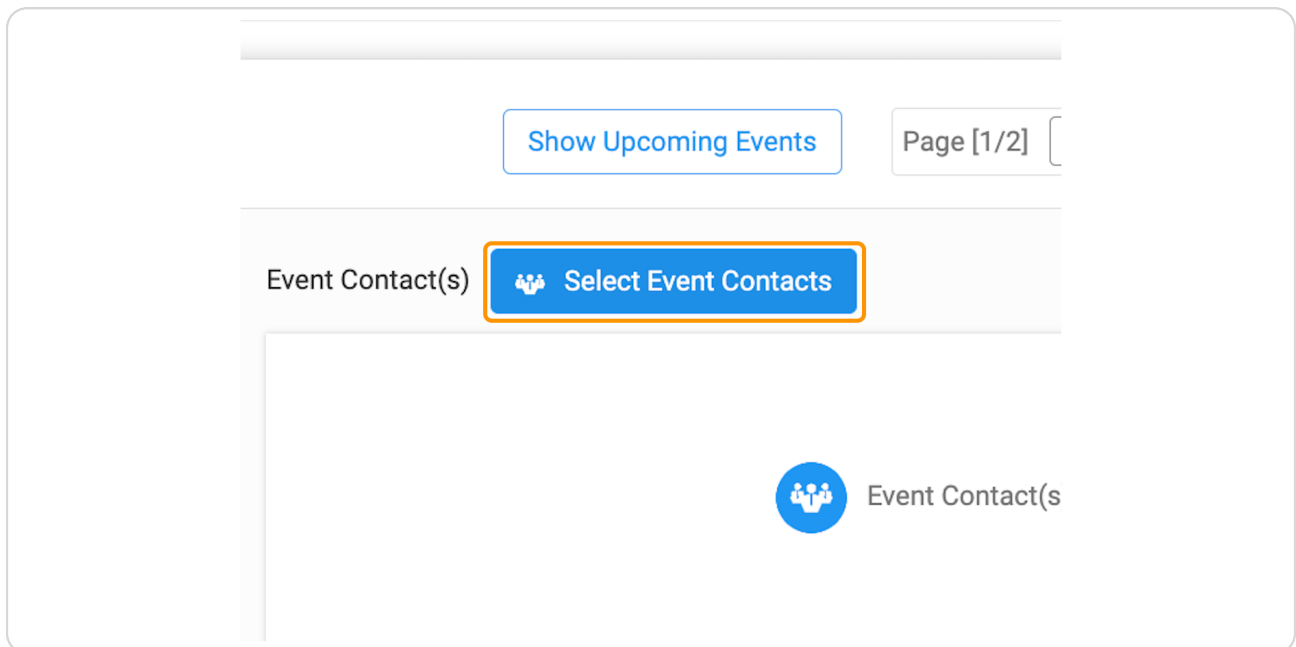
**STEP 11**

**Click on Save when finished adding your dates**



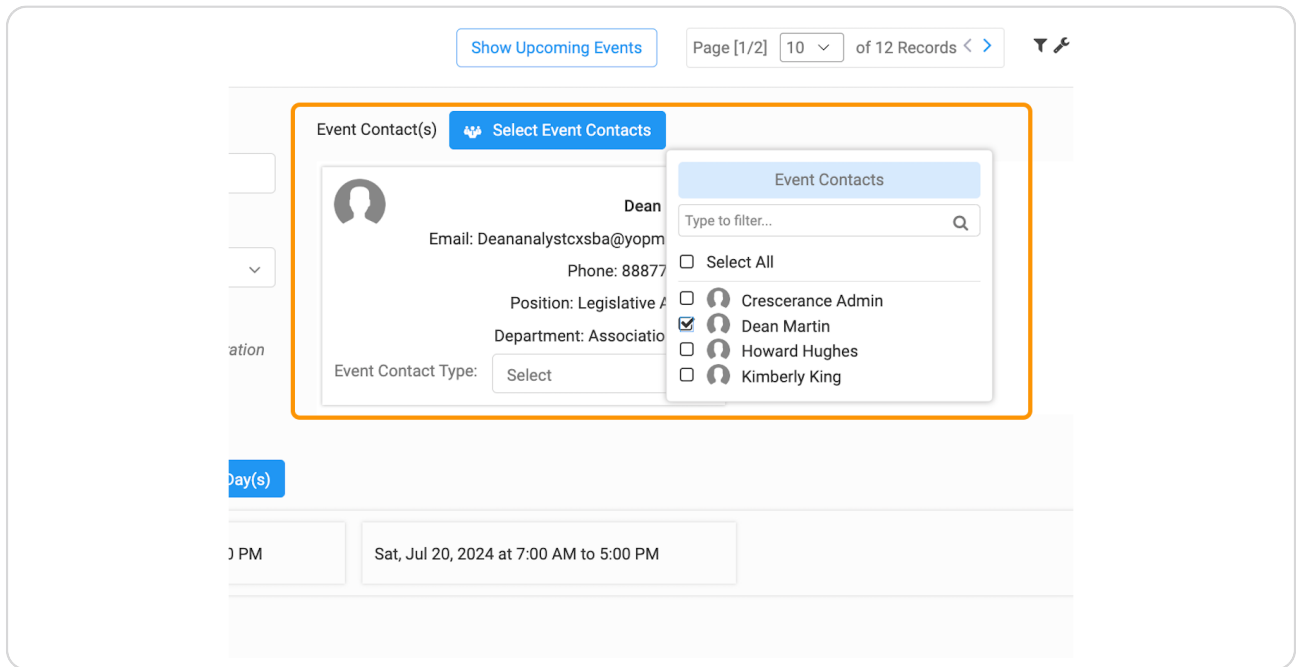
**STEP 12**

**Click on Select Event Contacts to add a contact for your registrants to reach out to with questions.**



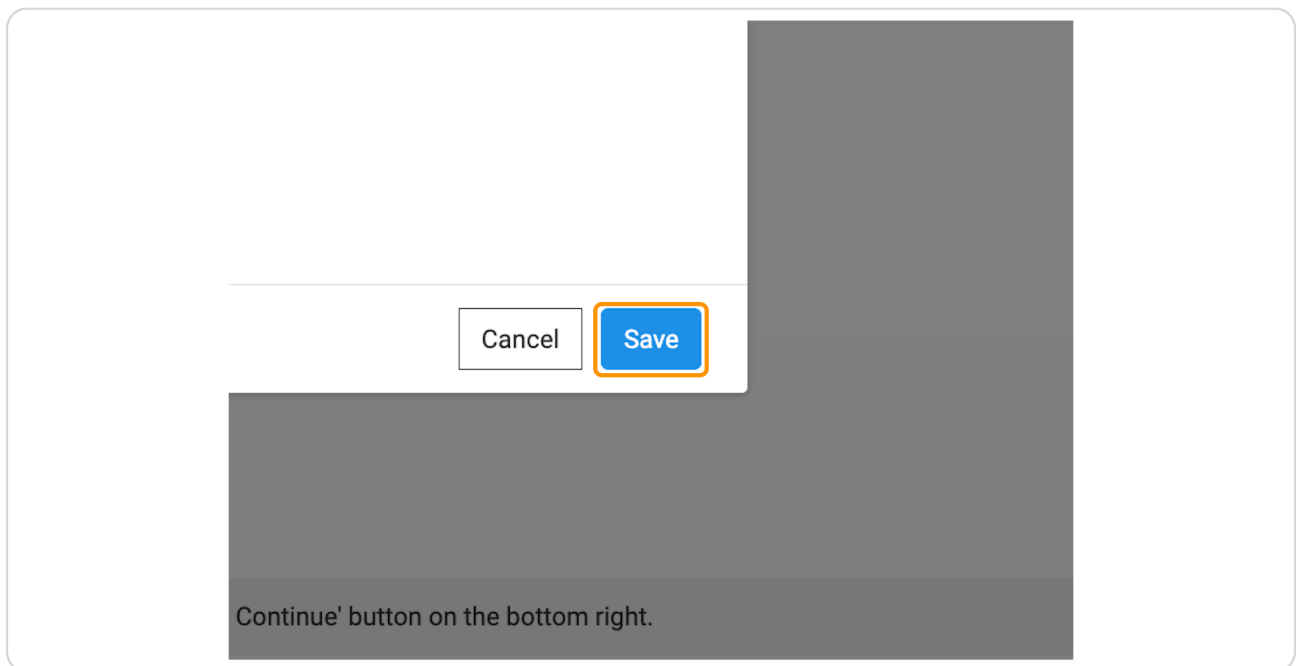
### STEP 13

#### Select your event contact from the dropdown



### STEP 14

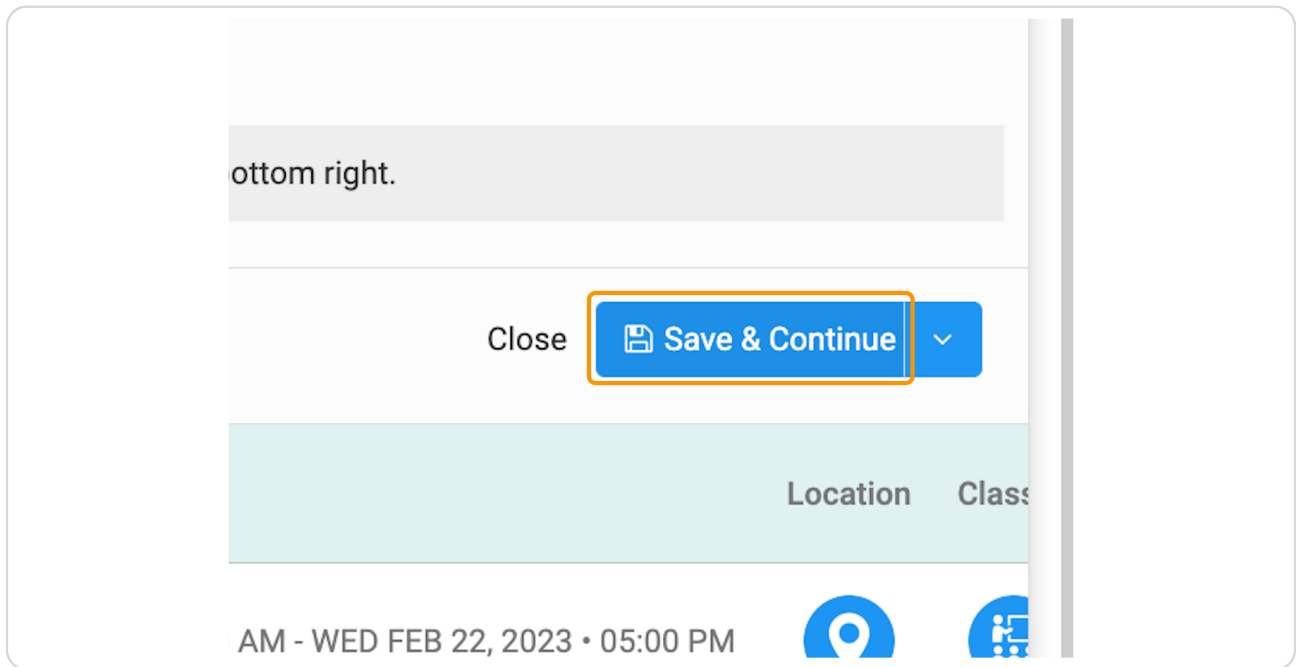
#### Click on Save





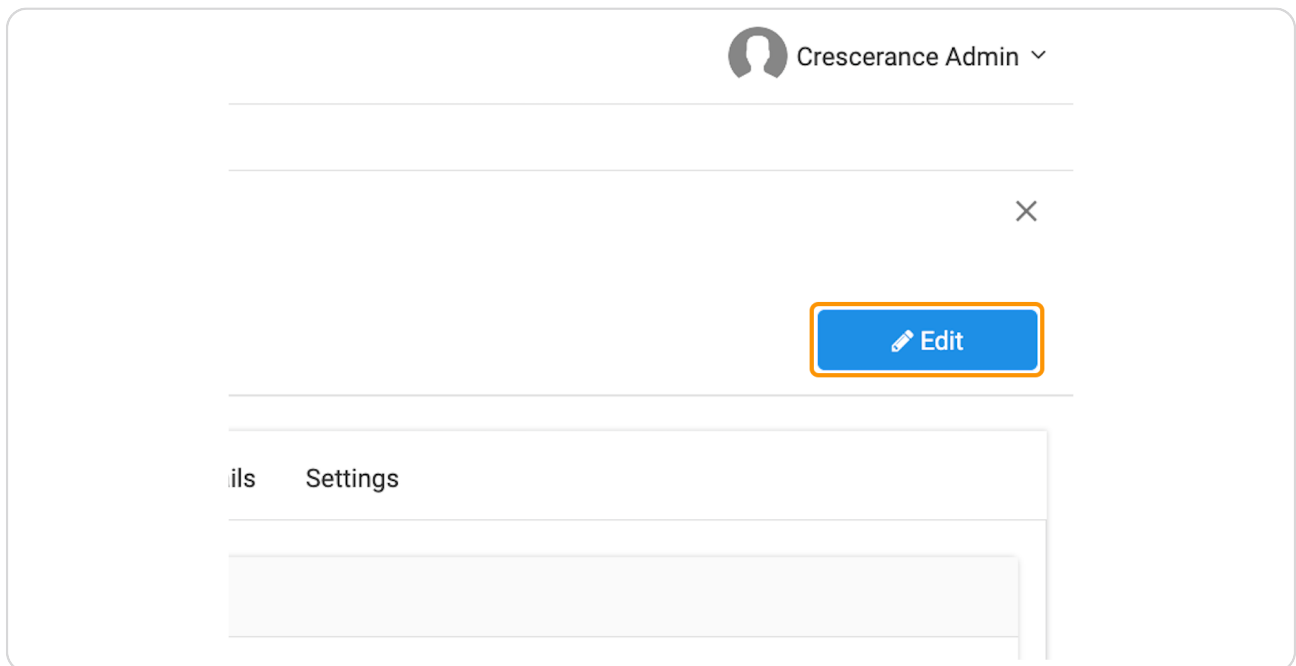
**STEP 15**

**Click on Save & Continue when you are finished with your initial event set up**



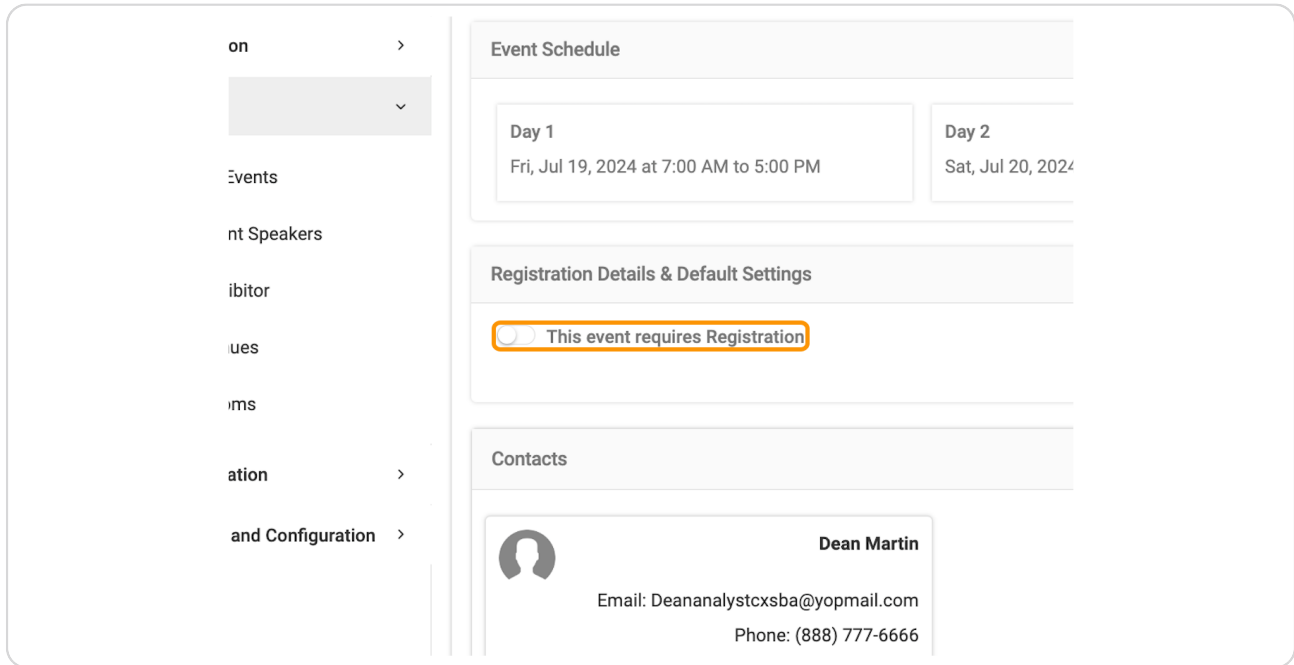
**STEP 16**

**Click on Edit to continue setting up your event**



## STEP 17

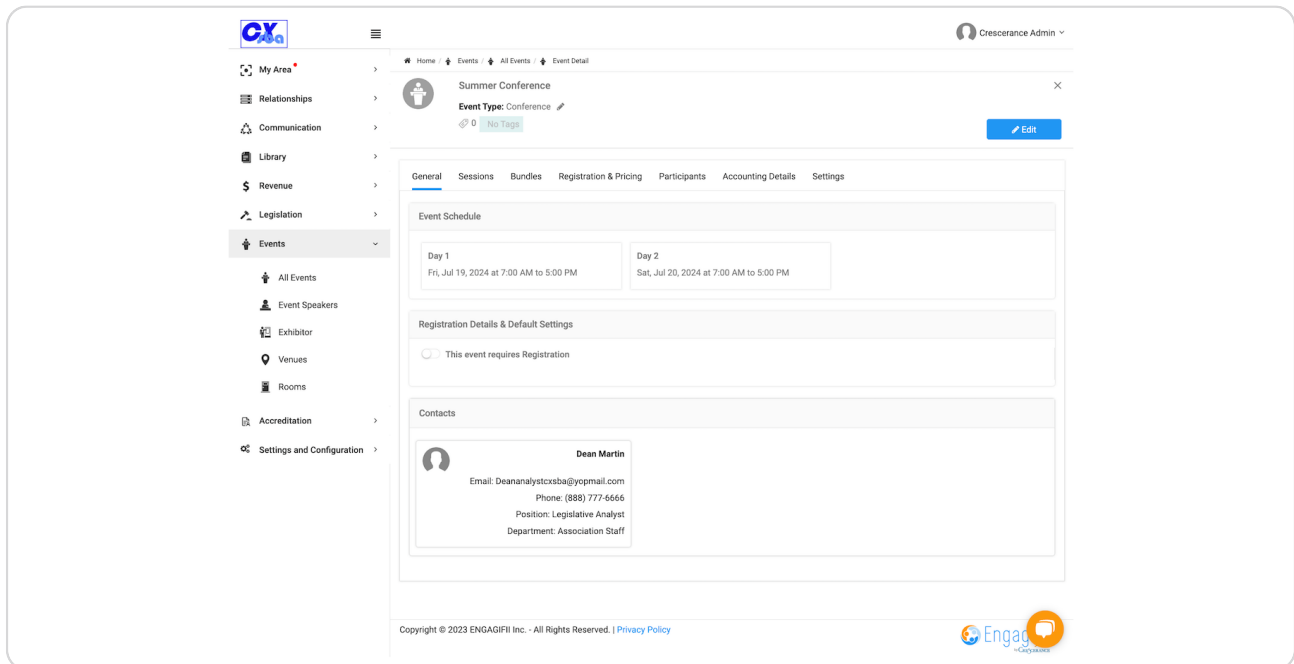
Click on This event requires Registration to set up the registration process



The screenshot shows a sidebar on the left with menu items: on, Events, Event Speakers, Exhibitor, Venues, Rooms, Registration, and Settings and Configuration. The main content area is titled 'Event Schedule' and contains two boxes: 'Day 1' (Fri, Jul 19, 2024 at 7:00 AM to 5:00 PM) and 'Day 2' (Sat, Jul 20, 2024). Below this is the 'Registration Details & Default Settings' section, where the toggle 'This event requires Registration' is highlighted with an orange box. The 'Contacts' section below shows a contact card for 'Dean Martin' with email 'Deananalystcxbsba@yopmail.com' and phone '(888) 777-6666'.

## STEP 18

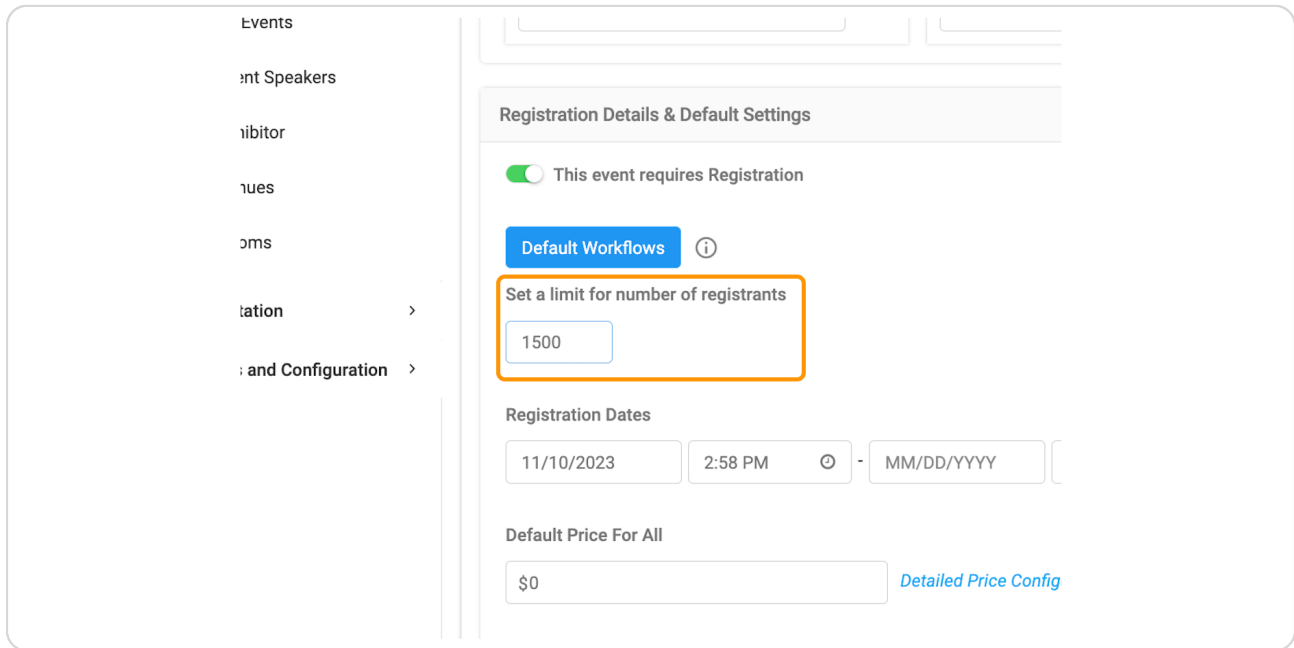
Drag highlighted element



The screenshot shows the full event configuration interface. The sidebar on the left includes 'My Area', 'Relationships', 'Communication', 'Library', 'Revenue', 'Legislation', 'Events', 'Event Speakers', 'Exhibitor', 'Venues', 'Rooms', 'Accreditation', and 'Settings and Configuration'. The main content area is titled 'Summer Conference' and includes tabs for 'General', 'Sessions', 'Bundles', 'Registration & Pricing', 'Participants', 'Accounting Details', and 'Settings'. The 'Registration & Pricing' tab is active, showing the 'Event Schedule' and 'Registration Details & Default Settings' sections. The 'This event requires Registration' toggle is highlighted with an orange box. The 'Contacts' section shows a contact card for 'Dean Martin' with email 'Deananalystcxbsba@yopmail.com', phone '(888) 777-6666', position 'Legislative Analyst', and department 'Association Staff'. The footer includes 'Copyright © 2023 ENGAGIFII Inc. - All Rights Reserved. | Privacy Policy' and the Engagifii logo.

## STEP 19

If you have a registration limit enter it here. This may be dependent on your venue or room settings



Events

Content Speakers

Contributor

Rules

Rooms

Registration >

Settings and Configuration >

### Registration Details & Default Settings

This event requires Registration

[Default Workflows](#) ⓘ

Set a limit for number of registrants

1500

Registration Dates

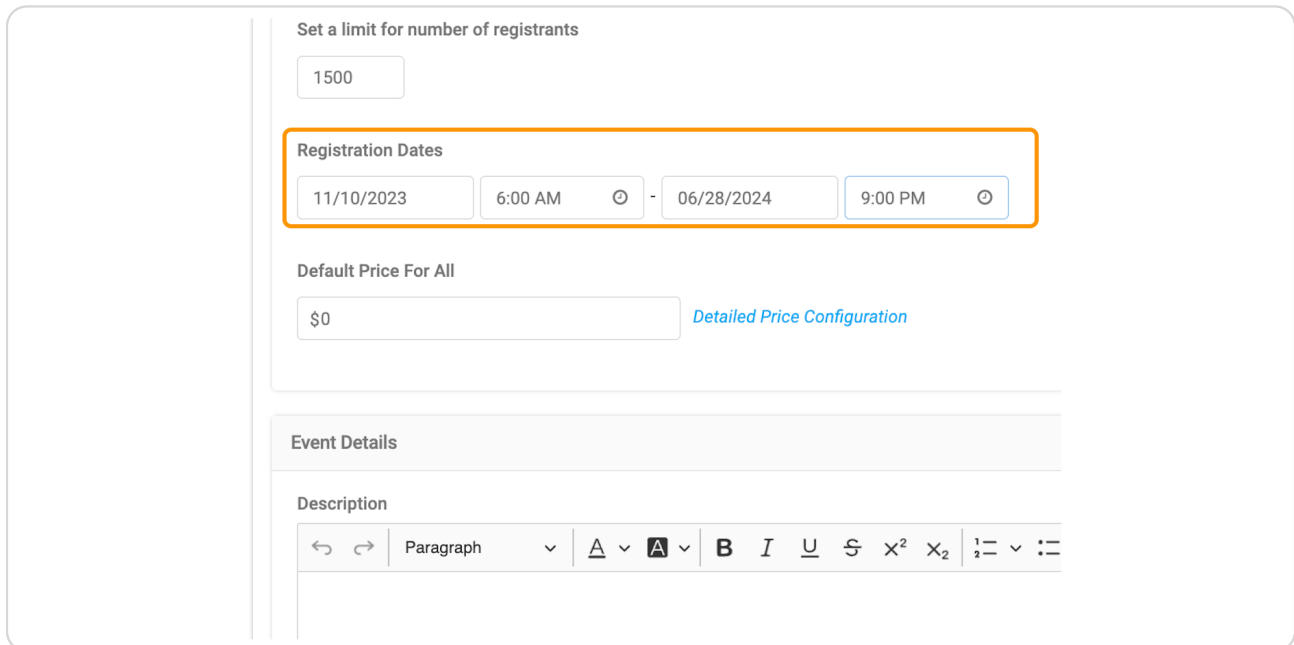
11/10/2023 2:58 PM ⓘ - MM/DD/YYYY ⓘ

Default Price For All

\$0 [Detailed Price Config](#)

## STEP 20

Enter registration dates and times



Set a limit for number of registrants

1500

Registration Dates

11/10/2023 6:00 AM ⓘ - 06/28/2024 9:00 PM ⓘ

Default Price For All

\$0 [Detailed Price Configuration](#)

### Event Details

Description

← → Paragraph ▾ A ▾ **B** *I* U ~~S~~ x<sup>2</sup> x<sub>2</sub> |≡ ▾ |≡

## STEP 21

### Enter a default price or leave blank to set pricing rules

The screenshot shows a configuration form for an event. At the top, there is a section titled "Set a limit for number of registrants" with a text input field containing the number "1500". Below this is the "Registration Dates" section, which includes two date pickers: the first is set to "11/10/2023" and the second to "06/28/2024", with time pickers set to "6:00 AM" and "9:00 PM" respectively. The "Default Price For All" section is highlighted with an orange border and contains a text input field with "\$0" and a blue link labeled "Detailed Price Configuration". Below these sections is a "Description" section with a rich text editor toolbar showing options for Paragraph, text color, background color, bold, italic, underline, strikethrough, superscript, subscript, bulleted list, numbered list, and indent.

## STEP 22

### Type your event description in the text box

The screenshot shows a configuration form for an event titled "Summer Conference". The "Event Type" is set to "Conference" and there is a "Tag(s)" field with a plus sign. A "Save" button is visible in the top right. Below this is a section for "Other Details" with a rich text editor toolbar. The text area of the editor is highlighted with an orange border. At the bottom, there is a "Contacts" section with a "Select Contacts" button. A contact card for "Dean Martin" is displayed, showing his email address "Deananalystcxsba@yopmail.com", phone number "(888) 777-6666", and position "Legislative Analyst".



**STEP 25**

**Once you have the event set to your liking, click on Save**

