Author: Kristenson, Joel **Last Updated:** 2016-12-20

Overview

This article provides a 'quick overview' on how to create a new event, add tickets/products, and how to publish the event online.

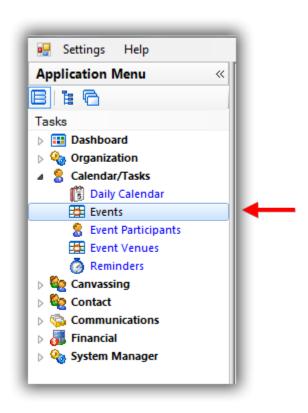
To get an in-depth knowledge of the event system, read through all the **related articles** and watch the videos at the bottom of this tutorial – the event system has many, many configurable options.

Tip: Watch this video playlist on creating events.

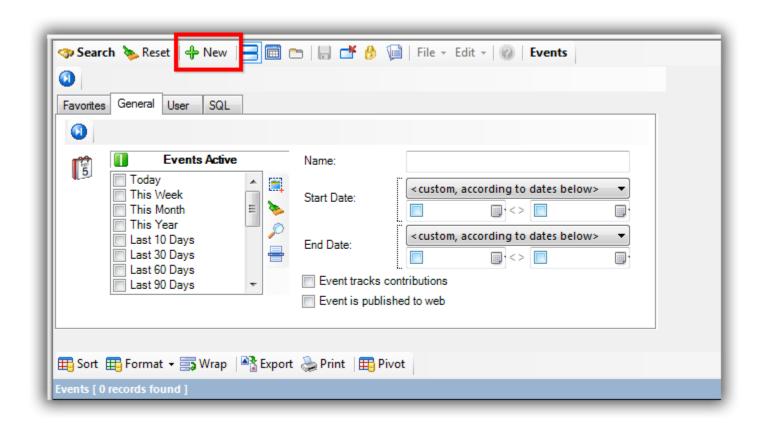


Steps

Open the **Events** list.

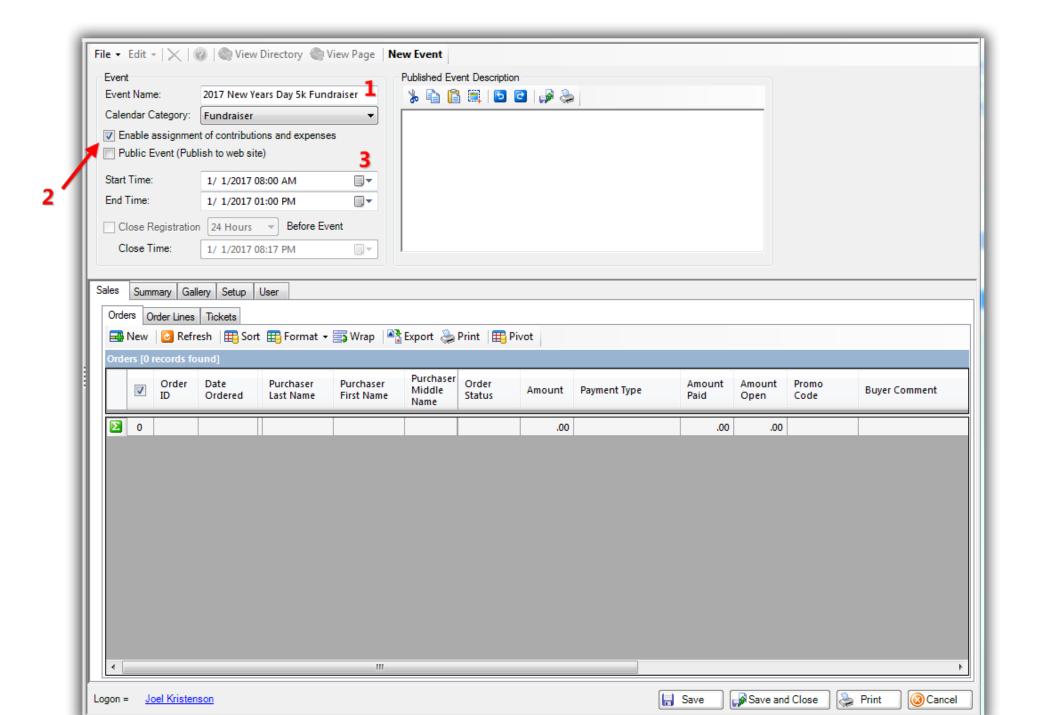


Click [+ New] on the Search tool strip.



Create a name, check the box for 'Enable assignment of contributions and expenses', and enter a date-rage.

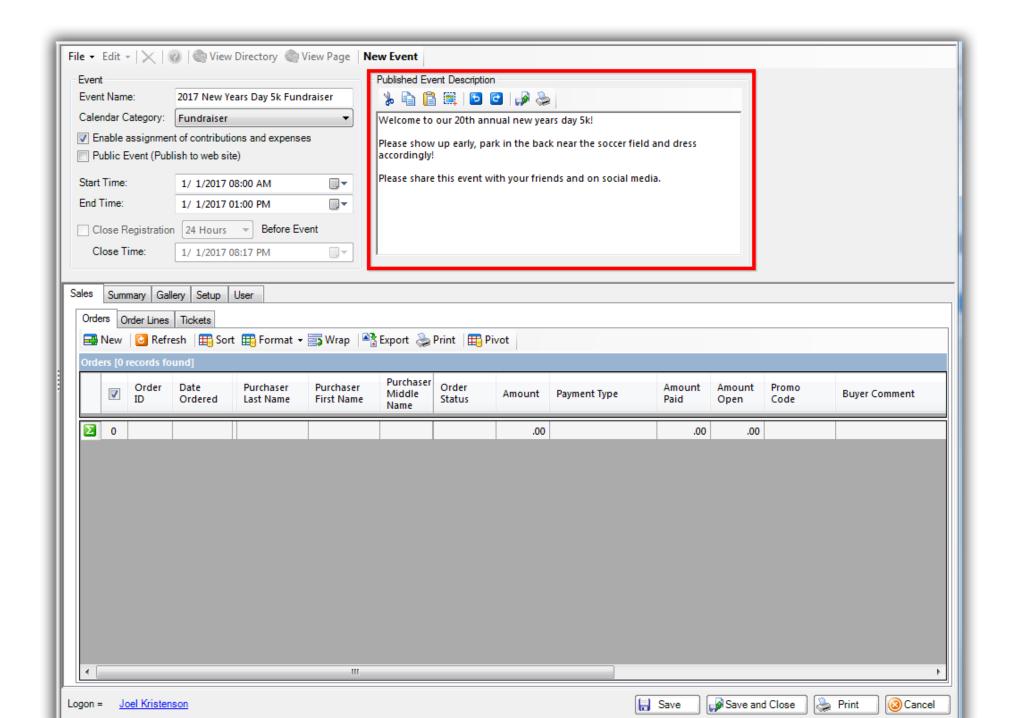






Enter a **description** in the top-right of the event record.

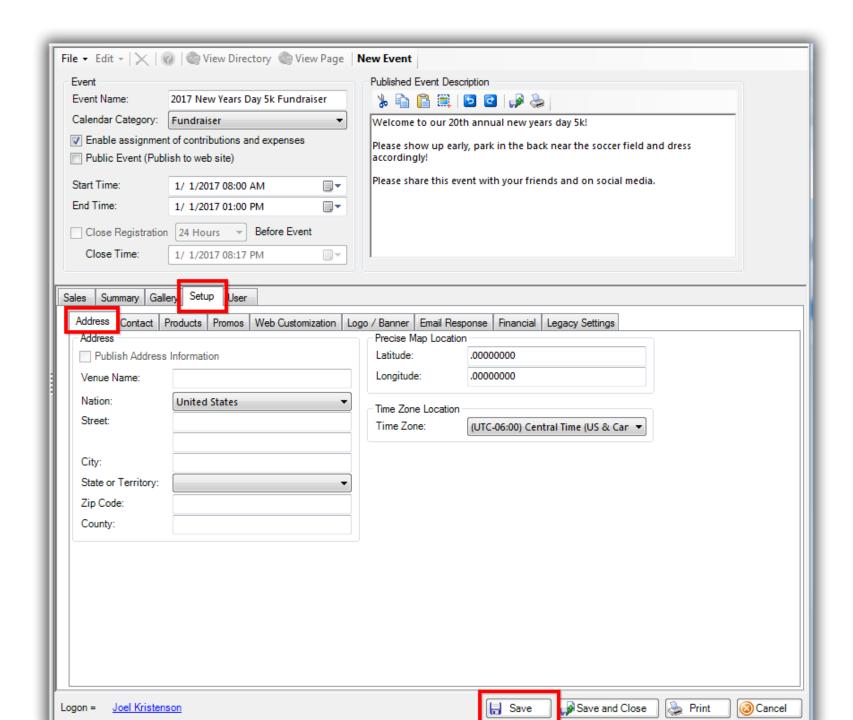






Click [Save] in the bottom-right and then navigate to Setup > Address.

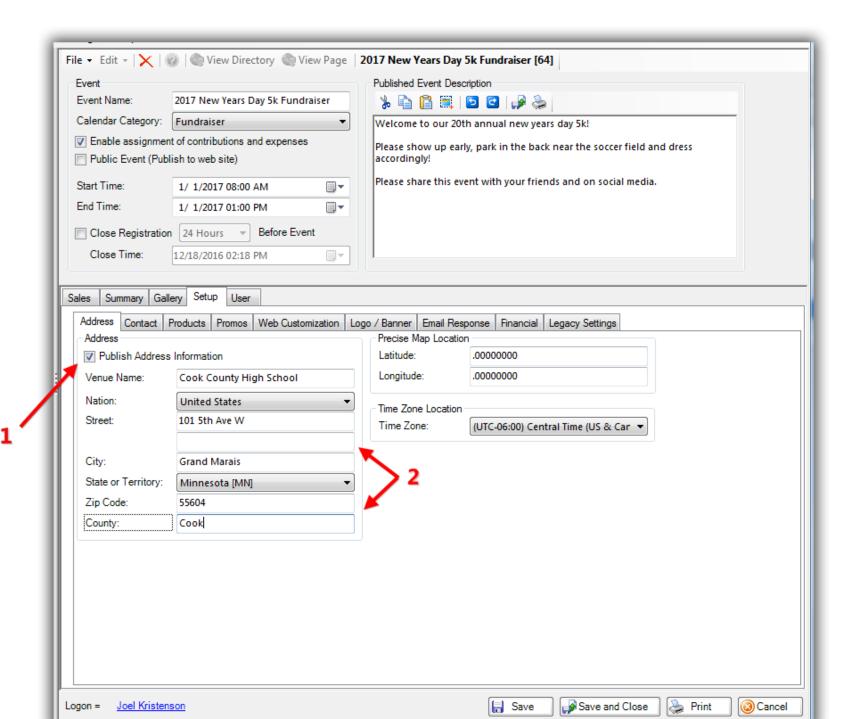






Check the box for 'Publish Address Information', enter the venue name and the location. If the check boxes aren't activated, close and reopen the event.

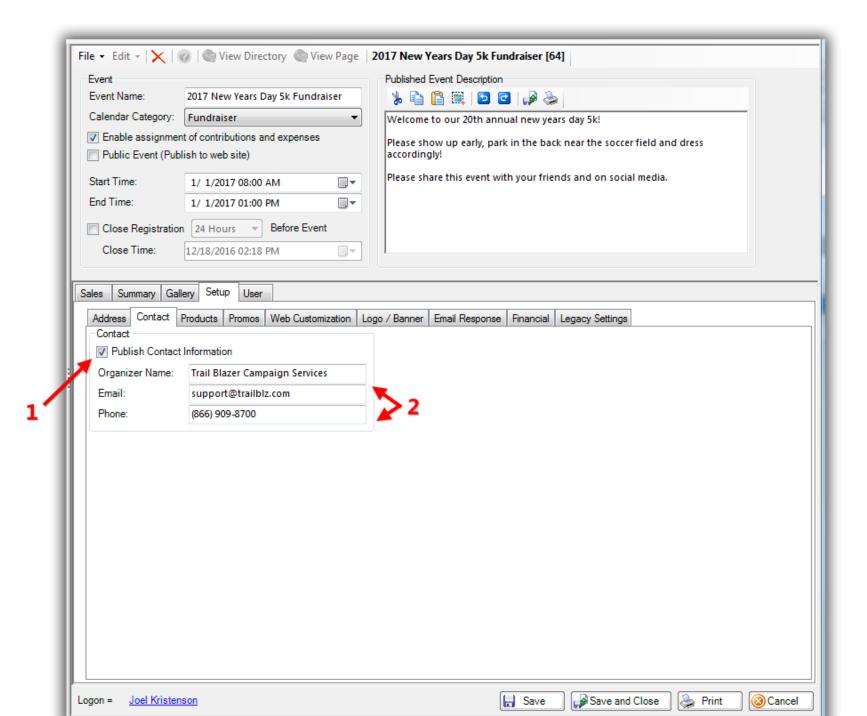






Navigate to the **Contact** tab, check the box for **'Publish Contact Information'**, and enter your contact info.



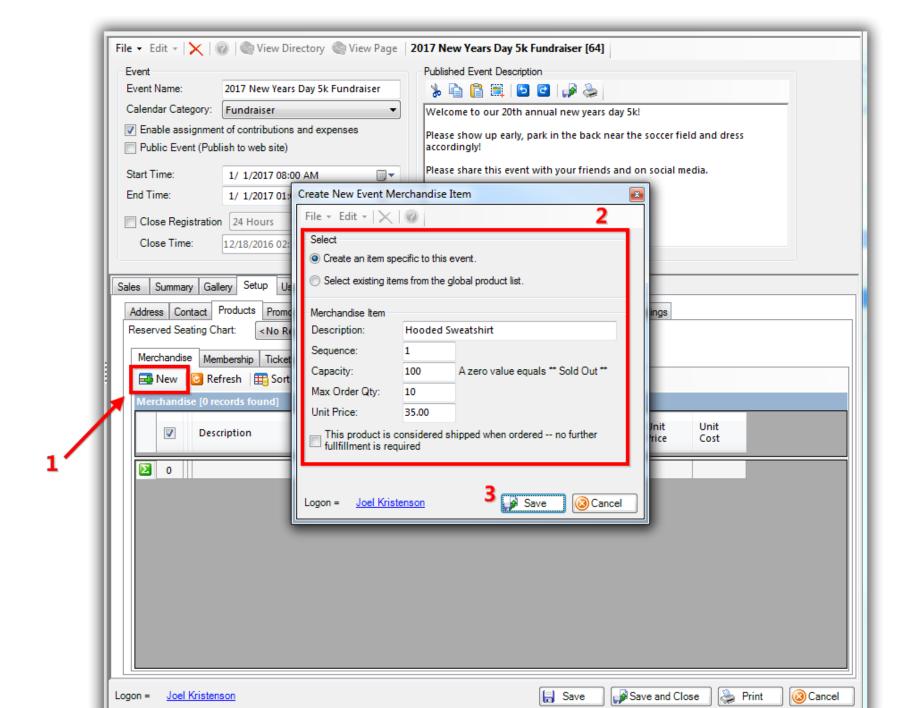




Navigate to the **Products** tab and create your **Tickets** and/or **Products** under each of those tabs (shown in the **two screenshots** below).

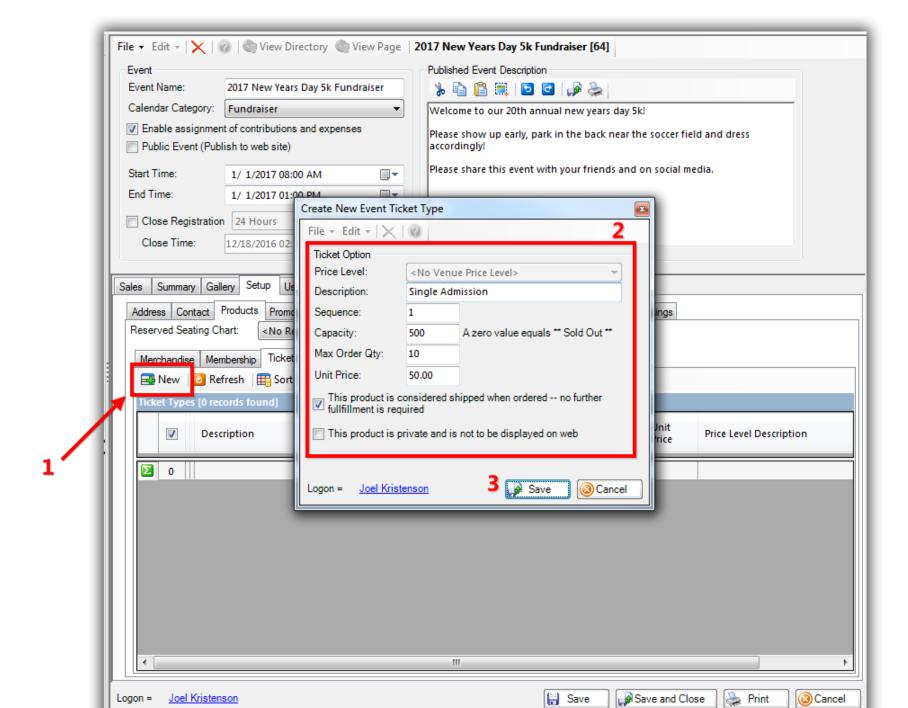
Img 1 of 2 – Creating Merchandise





Img 2 of 2 – Creating **Tickets**



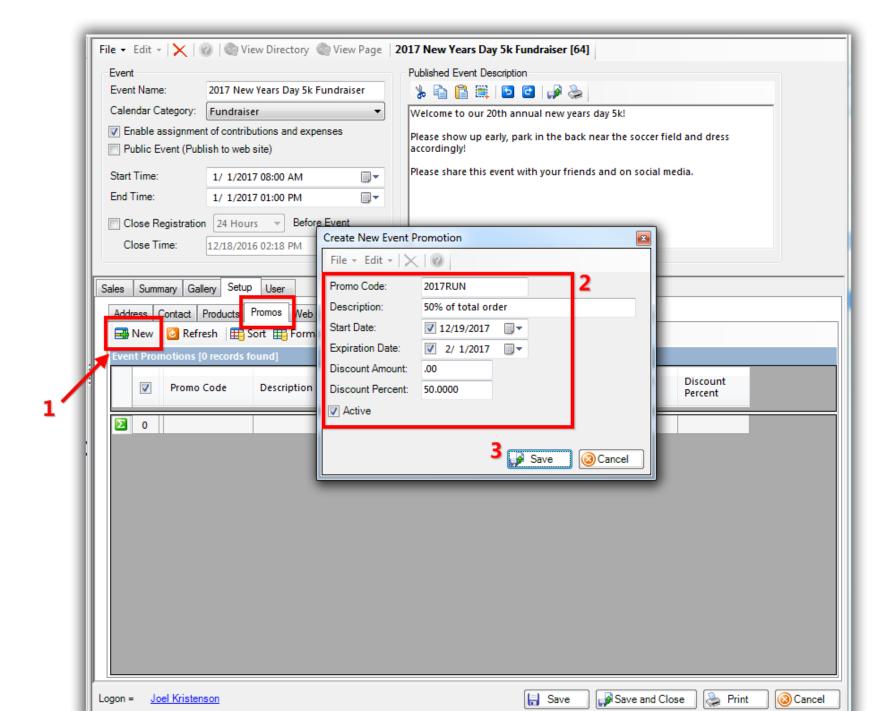




Make sure to provide a capacity and max order quantity for tickets/products or they'll display as sold out.

If you want to offer **promo** codes, create them under the **Promos** tab.



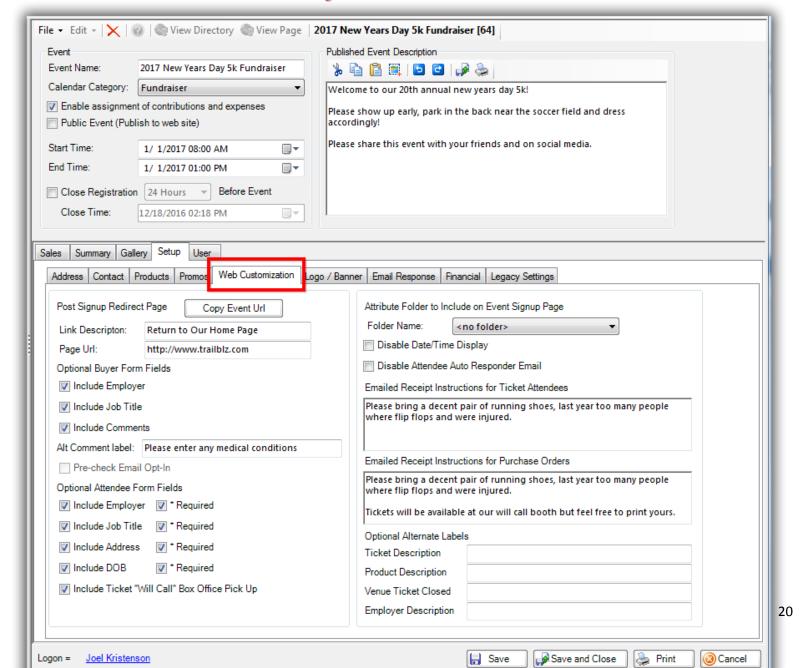




Navigate to the **Web Customization** tab and record all the relevant information (basically everything in this tab is optional).



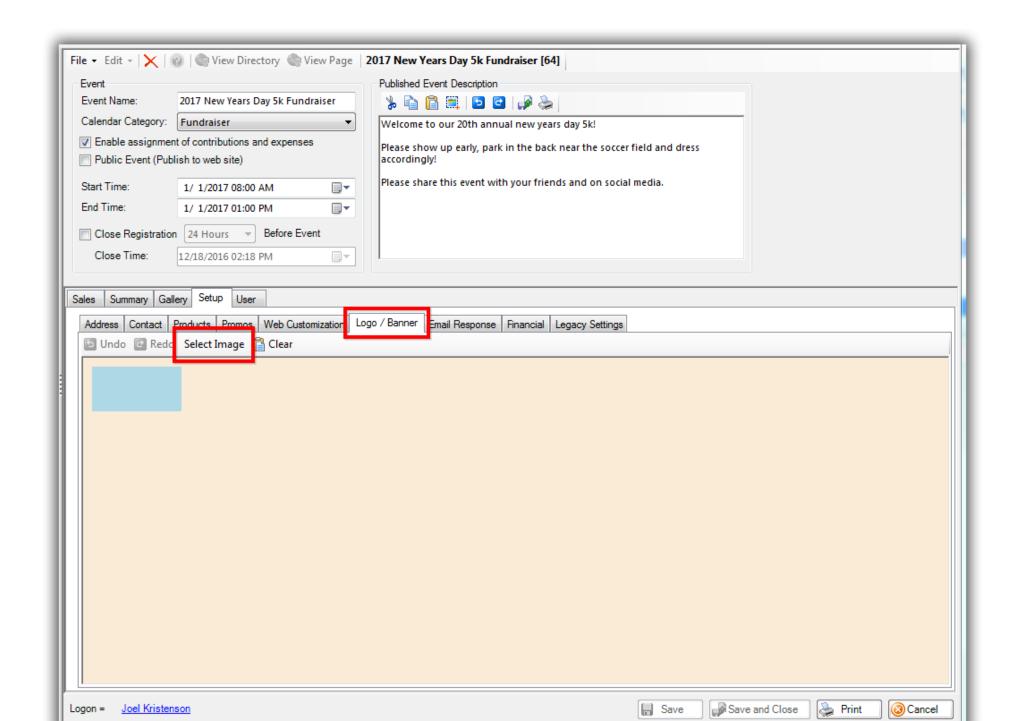
Enter all the information that you want under the 'Web Customization' tab.





Add your logo under the **Logo / Banner** tab. Start by clicking the **[Select Image]** button.

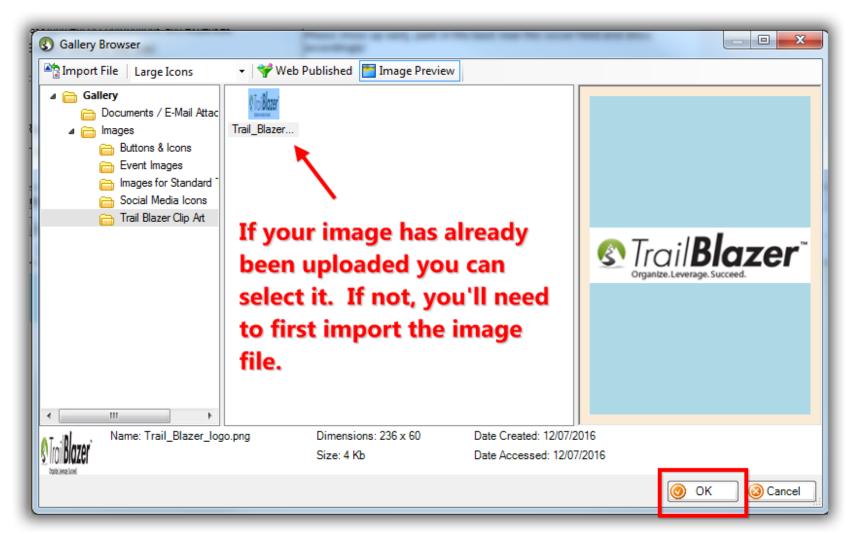






Either select an image you've previously uploaded to the System Gallery or upload a new one. Once that's selected, click [OK].





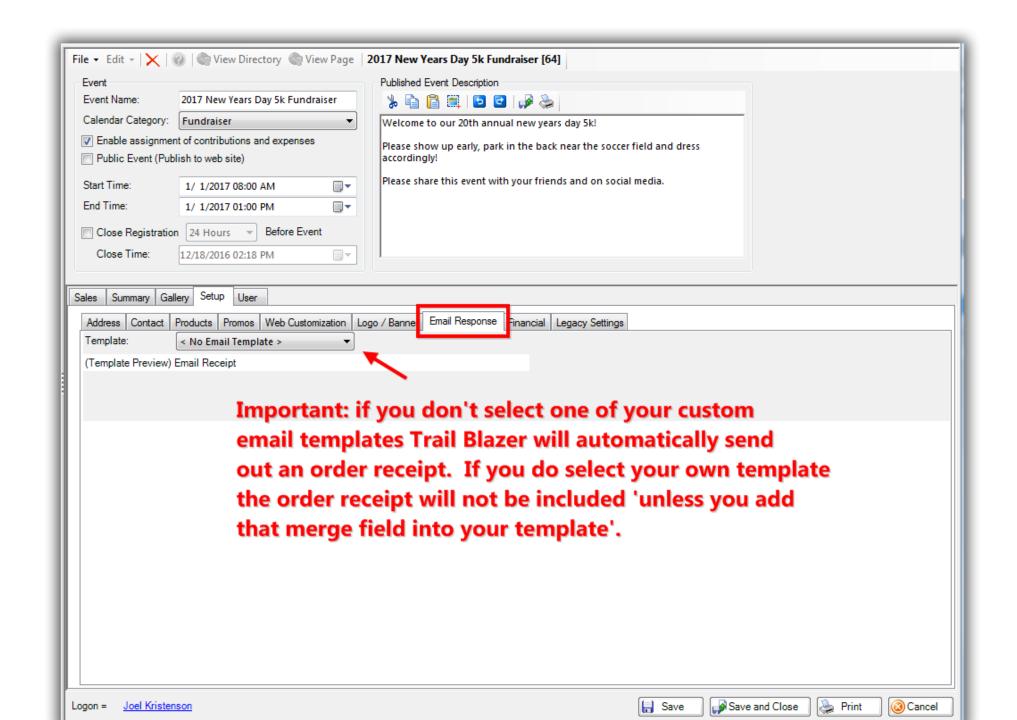
Once your image has been uploaded and selected, click [OK].



If you want to send a <u>custom thank-you email</u> (other than the receipt **Trail Blazer** automatically sends) you can select that under the **Email Response** tab.

Important: If you select your own template the event registrant will 'not' receive the order receipt that typically goes out unless you add that merge field into your template.



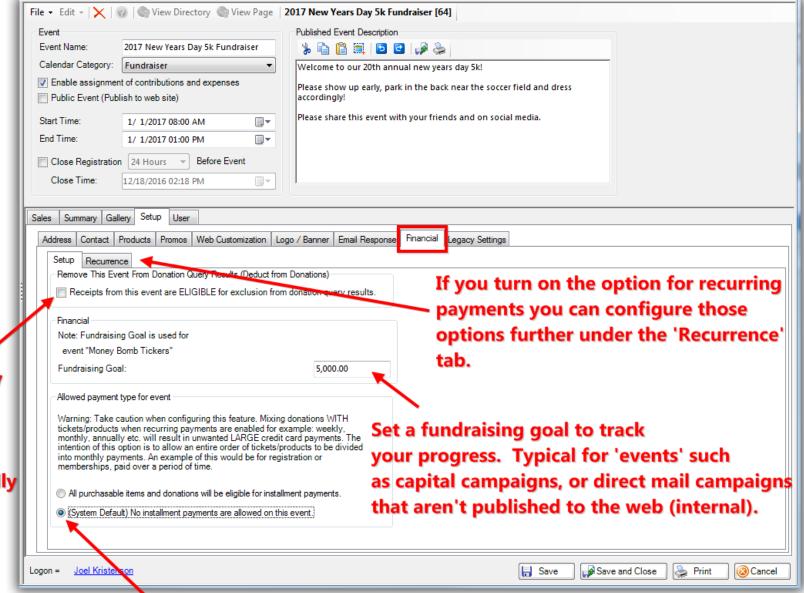




Under the **Financial** tab you have a few options:

- Set a **fundraising goal** (this column will display by default in the **Events** list so you can track your progress)
- Make all money for the event **eligible for exclusion from query results** (useful if you're not counting the money as tax-deductible)
- Enable the event for **recurring** payments, which you can further configure under the **Recurrence** sub-tab





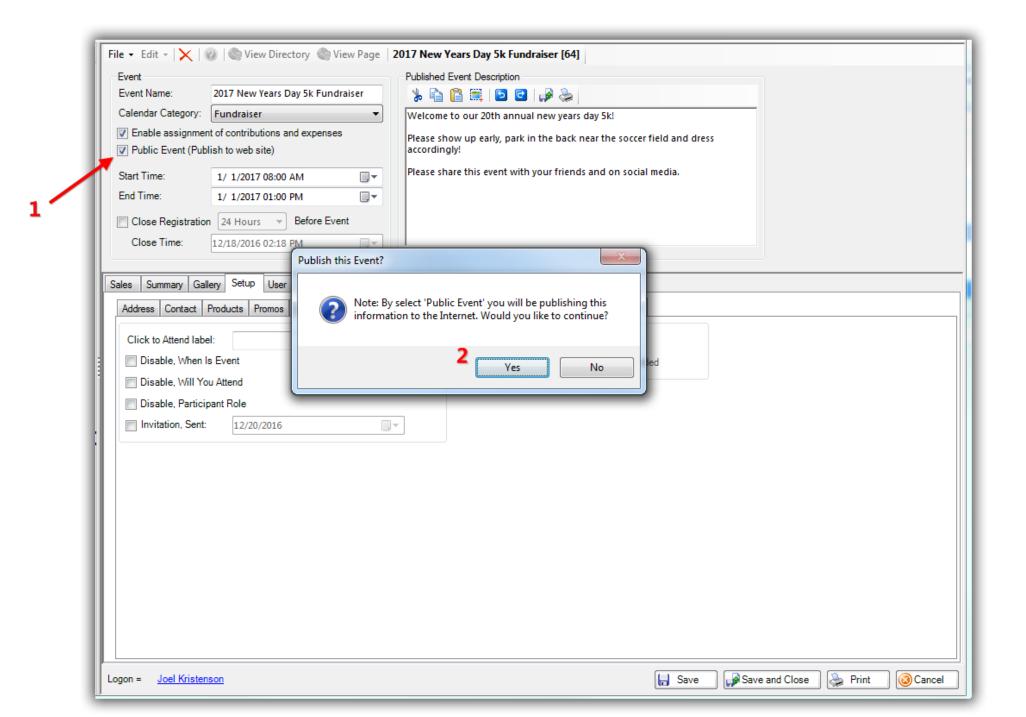
Check this
ONLY if you
want the money
for this event
to be excluded
from donation
reports. Typically
if the payments
aren't taxdeductible.



The last tab is called **Legacy Settings**. You can ignore this as its being phased out in the future and only affects customers using the old version of the events system (prior to 2013).

Once you're finished customizing the event, check the box in the upper-left to make it **public** and then click **[Yes]**.

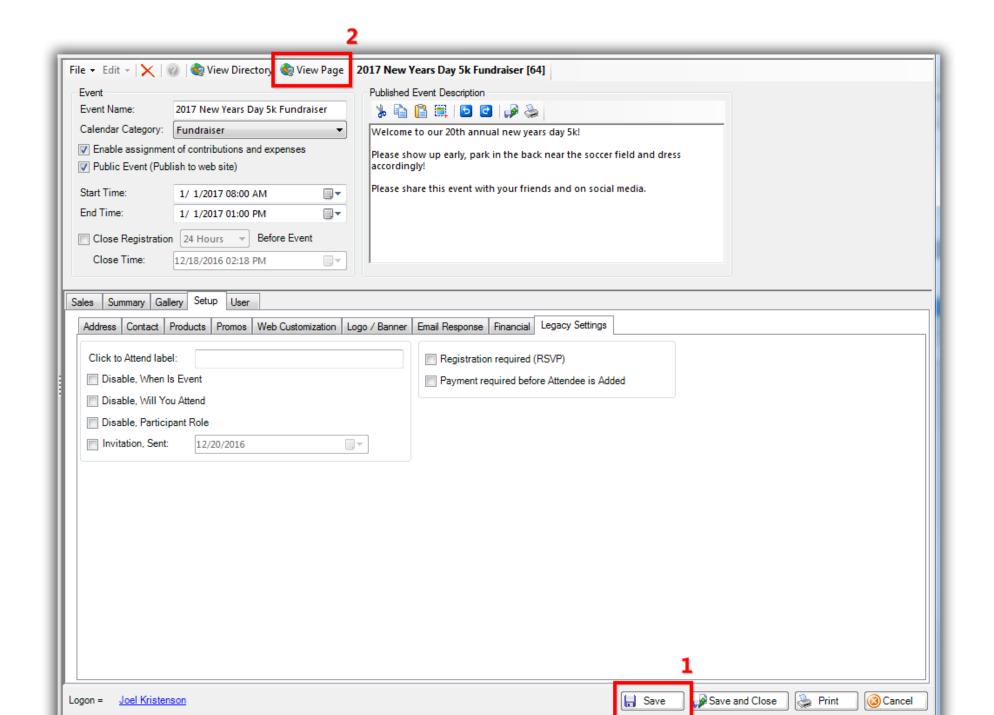






Click [Save] in the bottom-right and then click the [View] page button at the top which will open the event in your web browser.



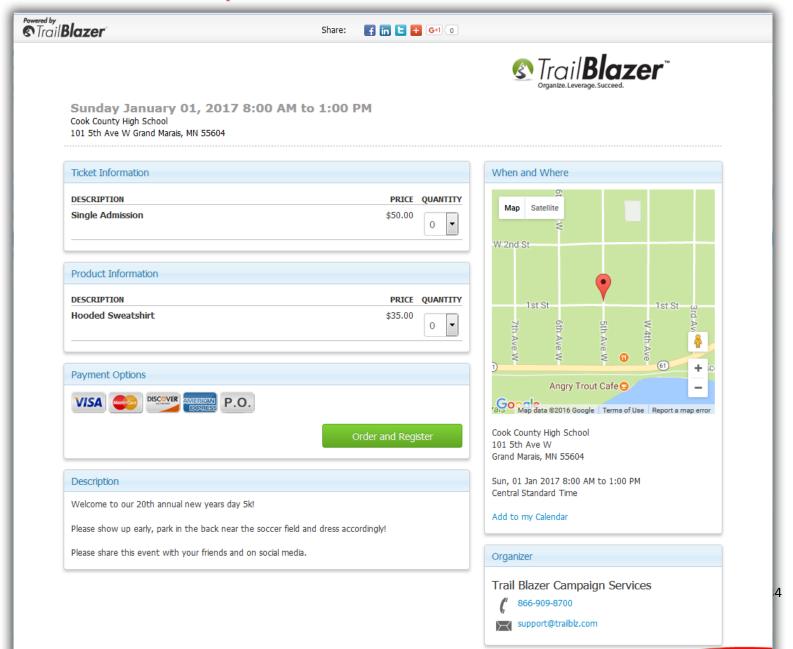




My *example* is below. It's a good idea to run some **test purchases** to make sure everything operates as you intend (you can create a free ticket and/or product for this purpose and <u>delete the purchase order</u> after the fact).



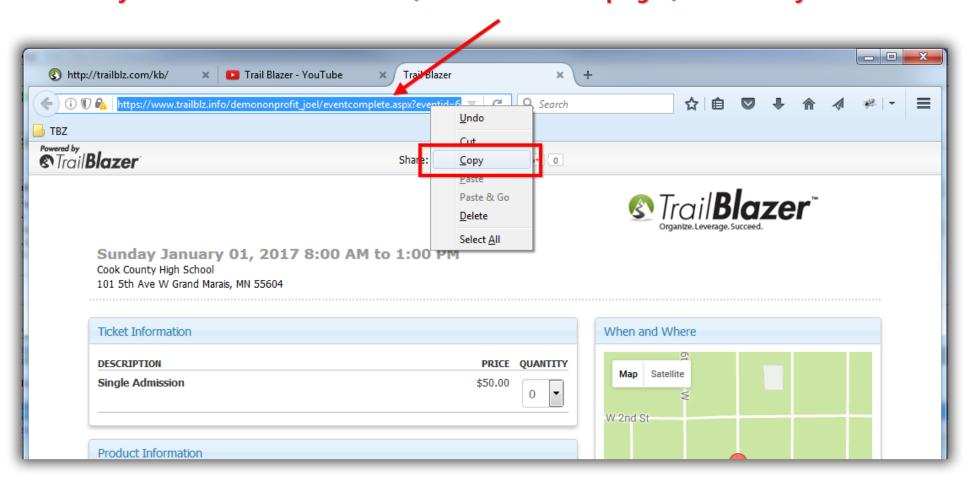
Example published event. The event system is mobile-friendly and will render to smaller screen sizes such as a tablet or phone.



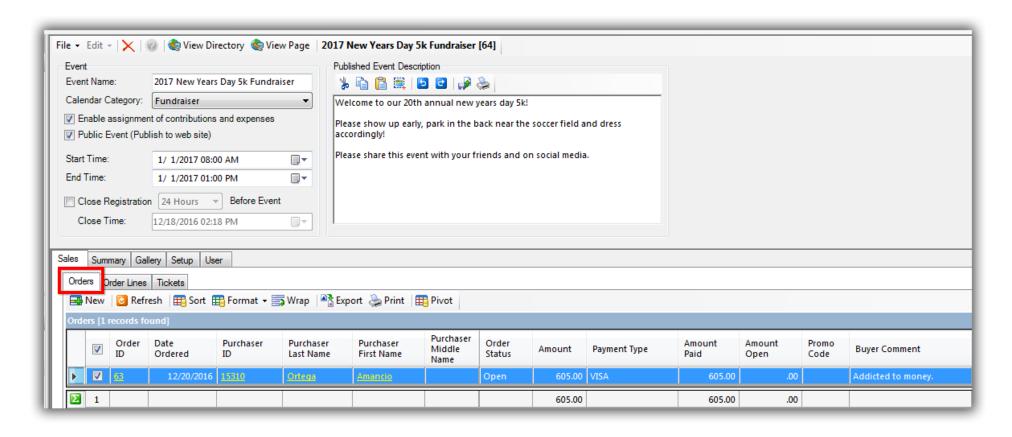


When you're finished creating the event you'll need to **copy** the **web address (URL)** which is what you'll use to publicize the event by <u>mass email</u>, snail mail, social media, and when **linking it to your website** so people can register.

When you're finished creating the event you'll right-click and copy this web address which is what you can share on social media, in mass email campaigns, and link to your website.



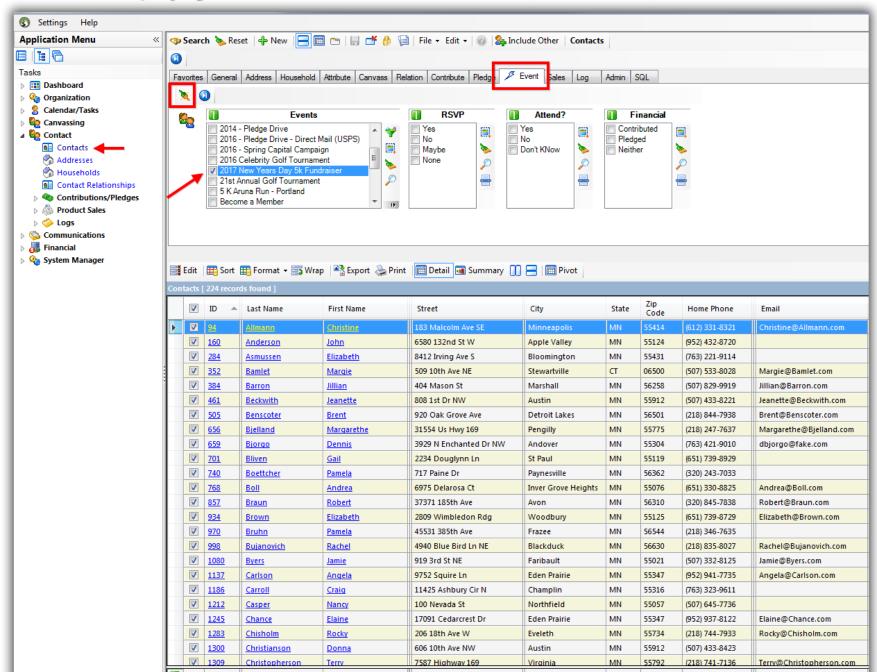
As orders come in they'll display under the **Sales > Orders** tab.



You can also query for the attendees from the Contacts (Voters/Donors) list.



Querying for event attendees from the Contacts (Voters/Donors) list.





The **related resources** below link to a wide variety of articles and videos that will teach you how to fully utilize the event tools in your database.

Tip: Plan your events early and test thoroughly. It's never a good idea to wait until the last minute to learn how the event tools work if it's your first time using them. Call our live support if you need a hand with any of this.



- YouTube Channel
- Knowledge Base Articles
- 3rd Party Resources



Related Resources

Article: How to Duplicate an Event – Save Time by Not Re-Creating Everything from Scratch

Article: How to Setup Different Payment Schedules for Events or Memberships – Ex (Monthly, Quarterly, or Bi-Weekly)

Article: How to Create Custom Email Responders for Specific Events – New 2016 Feature Upgrade

Article: How to Print or Re-Print Event Tickets and Event Order Receipts from your Database

Article: Purchase Orders – Manually Enter an Order for Tickets, Products, or Memberships from within an Event, and Record the Related

Contribution Record

Article: Events 2014 - Part I
Article: Events 2014 - Part II

Article: Web site signup < iFrame >

Article: Setting the Time Zone in your Trail Blazer Database

Article: Configure Website

Article: Email Notification of Web Occurrences

Article: How to Delete an Event Purchase Order and the Linked Donation Record (Typically for Refunds or if a Mistake Occurred or if Data needs to

be Moved)

Article: How to Add a Logo to an Event Page – 2015 Feature Upgrade

Article: How to Setup and use Promo Codes with Events (All Available Options)

Article: Add a Background Image to an Event

Video: Events 2013

Video: Events – Remove Person from Event
Video: Events – pay for an event online

Video Playlist: Events 2013



Trail Blazer Live Support

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* As a policy we require that you have taken our intro training class before calling or emailing our live support team.

<u>Click here</u> to view our calendar for upcoming classes and events. Feel free to sign up other members on your team for the same training.

- * After registering you'll receive a confirmation email with the instructions for how to log into the <u>GoToMeeting</u> session where we host our live interactive trainings.
- * This service <u>is</u> included in your contract.