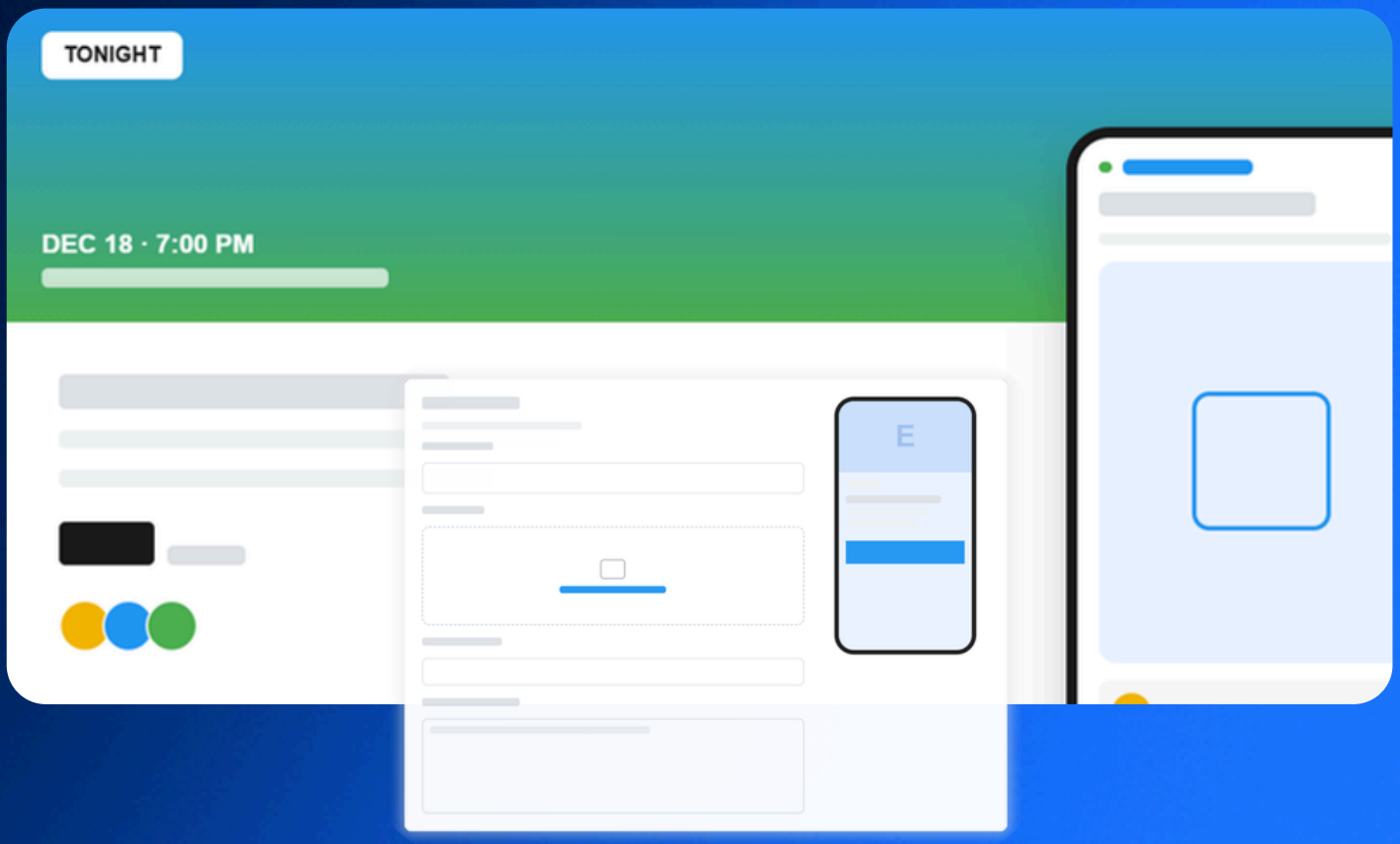
REFERENCE GUIDE

Events

Events from sign-up to check-in



Events Overview and Types

What It Is

An event is a sign-up page for something with a date and time. You choose Ticketed to sell tickets or RSVP for free registration, and that choice cannot be changed later.

How It Works For Your Business

- Search for Events to find it. It may show a Beta tag.
- The event list shows every event with a status. Draft is private and Published is live.
- Click Create your event to start, and pick Ticketed or RSVP first.
- Inside an event, tabs cover Tickets, Pages & Design, Registrations, and Settings.
- Every person who registers is saved as a contact in your account.

Events Overview and Types - Tips & Guidelines

Tips

- If you might ever charge, pick Ticketed. It can still hold free tickets.
- Click through every tab of one event before you build your own.
- Use the three-dot menu on an event in the list for quick actions.
- Registrations and Settings are the tabs you will use most after going live.

DO

- Pick Ticketed if money may be involved
- Check the status in the list
- Explore each tab once
- Use RSVP for plain free sign-ups

DON'T

- Guess the type and hope
- Expect to switch type later
- Ignore the Draft label
- Skip the tab tour

Event Details and Location

What It Is

The details are the name, image, words, dates, timezone, location, and organizer. You fill them in as you create an event, and you can edit them while it is still a draft.

How It Works For Your Business

- Type an event name of up to 100 characters and add a short summary of up to 160.
- Upload a cover image. The recommended size is 1920 by 1080 pixels, up to 5 megabytes.
- Write the description in the rich text box with short paragraphs and lists.
- Set start and end dates and the timezone. Sale periods and reminders follow that timezone.
- Choose In-person with an address, or Online with a session title and meeting link.

Event Details and Location – Tips & Guidelines

Tips

- Check the timezone twice. A wrong one shifts every time.
- Test an online meeting link in a new tab before you publish.
- Look for an option to hide the join link until the event starts.
- Add an organizer name and email. Replies go to that email.

DO

- Keep the name clear and short
- Add joining instructions online
- Use a real organizer email
- Set the end date to the last day

DON'T

- Skip the timezone
- Publish an untested link
- Write long text walls
- Leave the organizer blank

Ticket Types and Coupons

What It Is

A ticket type is one price level with its own name, quantity, and sale period. Coupons give a percentage off and can be limited by dates, total uses, and ticket types.

How It Works For Your Business

- On the Tickets tab, add a ticket type and name it, such as General Admission.
- Choose Fixed price and type an amount, or choose Free for guests and speakers.
- Enter the quantity of seats. When they are gone, that ticket sells out.
- Set a sale start and end. Statuses show as On Sale, Paused, Hidden, Not Yet on Sale, or Sale Ended.
- Add a coupon with a name, code, percentage, active dates, and usage limits.

Ticket Types and Coupons - Tips & Guidelines

Tips

- Use two ticket types with back-to-back sale dates for an early bird.
- Pause a ticket instead of deleting it when you need a break.
- Keep coupon codes short, like SAVE20.
- Test your coupon on the public page after you publish.

DO

- Plan total seats across tickets
- Add a free ticket for guests
- Check the status labels
- Limit coupons by dates and uses

DON'T

- Delete a ticket to pause it
- Use tricky coupon characters
- Forget the timezone on dates
- Skip testing the coupon

Public Page and Checkout

What It Is

Pages & Design controls what visitors see. You choose sections, style, and checkout fields, watch a live preview, then publish to get a public link.

How It Works For Your Business

- Open the Pages & Design tab and use the live preview, which starts on mobile.
- Turn sections on or off, like About this event, Tickets, Schedule, and Location.
- Look for the style settings to choose colors, a font, and a layout template.
- Edit the checkout title and add custom fields. Name and email are always required.
- Click Publish event, open the live link, and review the Live mode setting before real payments.

Public Page and Checkout – Tips & Guidelines

Tips

- Hide any section that does not answer a visitor question.
- Check the page on mobile and desktop.
- Keep checkout short. Fewer boxes means more sign-ups.
- Turn on terms and conditions only if you need agreement.

DO

- Preview on mobile first
- Pick one brand color and font
- Add only useful questions
- Check Live mode before launch

DON'T

- Show empty sections
- Add questions you will not use
- Publish without a preview
- Forget test mode is on

Registrations and Add Attendee

What It Is

The Registrations tab lists everyone signed up, with totals, search, and filters. Add Attendee lets you register someone by hand and record a card or offline payment.

How It Works For Your Business

- Open the Registrations tab inside an event to see totals, search, and filters.
- Search by name or email, and filter by status or date range.
- Click Add Attendee, choose ticket types and quantities, then Continue.
- Pick an existing contact or create a new one for each ticket.
- Choose Charge a card or Record offline payment, then click Add & Record Payment.

Registrations and Add Attendee - Tips & Guidelines

Tips

- Check the list the day before the event and confirm any VIP guests.
- Payment status matters, since only certain statuses can check in.
- Copy details across tickets to save time when you add several.
- The confirmation email goes out as soon as you click, so check first.

DO

- Search to confirm VIP guests
- Pick the right contact
- Record offline payments
- Verify the ticket type

DON'T

- Send guests to the page by habit
- Pick the wrong contact
- Skip the payment method
- Add without an email

Emails and Multi-Attendee Sign-Ups

What It Is

Your software sends attendees confirmation and reminder emails, and can alert you as organizer. Multi-attendee registration lets one buyer register several people with individual details.

How It Works For Your Business

- Attendees get a confirmation email after they register and reminder emails before the event.
- Organizers can get alerts and daily summaries about registrations.
- Look for the email templates in the event settings and edit the wording.
- A buyer can choose several tickets and enter details for each attendee.
- A copy-details option fills in the same information across tickets to save time.

Emails and Multi-Attendee Sign-Ups - Tips & Guidelines

Tips

- Read your confirmation email as a new attendee would.
- Keep reminder wording short with the date, time, and place.
- Send yourself a test registration to see the emails.
- Ask only for details you need when many tickets are bought.

DO

- Edit templates in plain words
- Test the emails yourself
- Use copy details for groups
- Include joining info online

DON'T

- Leave default wording unread
- Hide the date and time
- Ask for needless details
- Skip a test sign-up

Duplicating and Embedding Events

What It Is

Duplicating copies an event to make a new draft, and you can reuse design from another event. An embed code snippet puts your event on your own website page.

How It Works For Your Business

- Click the three-dot menu on an event and choose Duplicate.
- Set the new dates and choose what to copy into the new event.
- Review the side-by-side preview. The copy is created as a draft.
- In Pages & Design, look for the option to copy from another event.
- Copy the embed code snippet and paste it into a page on your website.

Duplicating and Embedding Events - Tips & Guidelines

Tips

- Duplicate your best event each time you run it again.
- Change dates and check the timezone on the copy.
- Review the draft before you publish it.
- Preview the embedded page on mobile after you paste the code.

DO

- Duplicate repeat events
- Update the dates first
- Preview the copy
- Test the embed on your page

DON'T

- Rebuild from scratch each time
- Publish an unchecked copy
- Forget what you chose to copy
- Paste code without testing

Check-In, Refunds, and Cancellations

What It Is

Check-in is for in-person events and uses the Events App to scan tickets. You can also refund or cancel registrations and choose which payment statuses may enter.

How It Works For Your Business

- Check-in works for in-person events only. In the Events App, select the event and scan to check in.
- In the Attendees tab, use the manual Check in button when a scan will not work.
- Scanning shows messages for a duplicate scan or an invalid ticket.
- In Registrations, open Actions to initiate a refund or cancel a registration.
- Refunds and cancellations can be full or partial. In Settings, choose which payment statuses allow QR entry.

Check-In, Refunds, and Cancellations - Tips & Guidelines

Tips

- Test one scan before doors open.
- Keep manual check in as your backup.
- Decide check-in eligibility before the event, not at the door.
- A duplicate scan message means that ticket already came in.

DO

- Plan a backup for scanning
- Set payment status rules early
- Handle refunds from Registrations
- Test a scan first

DON'T

- Use scan for online events
- Wait until the door to decide
- Refund without checking the record
- Ignore invalid ticket messages

Event Workflows and Tracking

What It Is

Events can start automations when someone registers or checks in. You can also track event activity with Meta Pixel.

How It Works For Your Business

- Workflows can start with an Event Registration trigger or an Event Checked In trigger.
- Use filters so the workflow only runs for the event you want.
- Add a Wait step set to before or after the event to time follow-ups.
- Look for the Meta Pixel setup for events to track activity.
- Check your account's help for the current steps, since tracking options can change.

Event Workflows and Tracking - Tips & Guidelines

Tips

- Start with one simple workflow on one event.
- Use Wait until timing for reminders and thank-you messages.
- Test with your own registration before real sign-ups.
- Keep names clear so you know which event a workflow belongs to.

DO

- Filter by the right event
- Time steps around the event
- Test with a real sign-up
- Name workflows clearly

DON'T

- Run one workflow for every event
- Guess at trigger names
- Skip testing
- Forget the timezone

Key Terms Glossary

Ticketed event

An event with ticket types, price levels, and free tickets.

RSVP event

An event with free registration and no payment.

Ticket type

One price level with its own name, seats, and sale dates.

Sale period

The start and end when a ticket can be bought.

Coupon code

A code that gives a percentage off tickets.

Registration

One sign-up for an event, saved in the list.

Draft

A saved event that is not live yet.

Live mode

The setting that lets real payments go through.

Organizer

The host whose name and email show on the event.

Checkout

The form people fill in to register.

Check-in

Marking an attendee as arrived, by scan or by button.

Embed code

A snippet that shows your event on your website.

Getting Help

Your software changes over time, so a button, tab, or menu path may look a little different from what you see here. If something does not match, check the in-app help for Events, or look for the option with the closest name.