Event User Guide

Event Actions

Add Event

To start this action, click the   Add Event   button above the Event listing.

Creates a new Event.

When this action starts a form is displayed to enter the details of the Event.

Each field customises or controls some aspect of the Event display or behaviour.

Some fields are required and must be entered before the Event can be added, the required fields are Reference Code, Display Time?, Short Event, Add to Search Engine Site Map file, Bookable, Set Capacity, Attendee Field Set, Book Time Value, Show 'Minimum Attendees' Heading, Show 'Additional Attendees' Heading.

Although some fields are not required, it is best practice to populate these, including Title, Description, Add to Search Engine Site Map file.

Most fields are optional, and are often prefilled with a good default so these may not need to be changed. These optional fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

View

To start this action, select the Event you need to work on, and click the   🔍 View   button in the ⋮ More Menu on that row.

Display the selected Event.

This action displays the Event similarly as for an Edit Action, except none of the fields are editable.

Useful for reviewing records without making any changes.

Edit

To start this action, select the Event you need to work on, and click the   ✏   button on that row.

Edits an existing Event.

When this action starts a form is displayed with the existing Event and any previous information entered.

Each field customises or controls some aspect of the Event display or behaviour.

When editing it is advisable to only change what is needed and most fields may not need to be changed. These other fields allow further customisation.

Alongside most fields is a small ? icon with further help for each field. This information is included at the end of this document.

Copy

To start this action, select the Event you need to work on, and click the   ⧉ Copy   button in the ⋮ More Menu on that row.

Copies an existing Event.

The selected Event is copied and the word (Copy) will be added to the name of the new Copy

Delete

To start this action, either select the Event to work on and click the   🗑   button on that row. Or CTRL+click to select multiple Events and click the   🗑   button above the Event listing.

Deletes an existing Event.

When this action starts a screen is displayed to check for Confirmation before the Action continues.

On this screen a list of warnings may be provided to show the impact of deleting this Event.

Search

To start this action, click the   🔍   button above the Event listing.

Allows a Search of Events.

This allows a simple text search across all Events.

To search a specific field select the field from the drop down list

Adv. Search

To start this action, click the 🔍 Adv. Search button above the Event listing in the ⋮ More Menu.

Allows an Advanced Search of Events.

The Advanced Search opens a new section at the bottom of the Events and allows several distinct features:

- Multiple Search Lines : allows Event matches to be identified where more than one search criteria is required

- Nested Searches : allows a combination of AND and OR logic to find results

- Saved Filters : allows a search to be saved as a Filter

- Export : allows the results of the search to be exported and worked on separately

Refresh

To start this action, click the ↻ Refresh button above the Event listing in the ⋮ More Menu.

Refresh the list of Events.

Allows the list of records to be refreshed.

Although the records in the system will automatically update if a another Admin is using the system at the same time, the Refresh button allows the list to be manually updated.

Export to List

To start this action, click the ☁ Export to List button above the Event listing in the ⋮ More Menu.

Export the Event results shown to a List.

An Export List can be downloaded as a CSV file, or through any number of customised Export Templates.

Export to List will begin the process of Exporting the Events shown.

Once the data is exported it is available to download as a CSV file with all columns.

A list of Export Templates for Events will be shown, select the Export Template to Print, Export to Document, Export to CSV or Email.

Before using a template an opportunity to amend the template is provided.

See Export Templates for more information on Managing Export Templates.

Export All

To start this action, click the ⤓ Export All button above the Event listing in the ⋮ More Menu.

Export all the Events to a List.

Exactly as for "Export to List" except rather than just Exporting the Event results shown, all Events will be expored.

Export Item

To start this action, select the Event you need to work on, and click the ☁ Export Item button in the ⋮ More Menu on that row.

Export only the selected Event to a List.

Exactly as for "Export to List" except rather than just Exporting the Event results shown, only the selected Event is exported.

Choose Columns

To start this action, click the ⚙ Choose Columns button above the Event listing in the ⋮ More Menu.

Changes the Columns shown in the Event Listing.

The Choose Columns screen shows the Selected Columns on the left, and the Event Columns available on the right.

Drag and Drop column names between the two columns.

Alternatively double click on a column name to move it from one list to the other.

On the left the Selected Columns can be dragged up and down to change the ordering in the Event Listing.

Manage Filters

To start this action, click the ☰ Manage Filters button above the Event listing in the ⋮ More Menu.

Creates custom Filters for Events.

A Filter is a saved Advanced Search. Multiple Filters can be created for Events.

These Filters appear at the top of the Event listing.

When the Filter is selected the results are restricted to only include those which match the Filter.

The Manage Filters action shows a list of existing Filters for Events where these can be managed.

Event Field Reference

Reference Code

This field is mandatory.

A unique code for each event

Display Time?

This field is mandatory.

Select the format to display the time.

Event Summary

Summary of event for display in the summary (list) view

Event Detail

Description of event to display in detailed view.

Short Event

This field is mandatory.

If set, the event only has a short description. The 'Summary' field is not used. The Event List Item will display the contents of 'Event Detail' field and the event does not have a click-through 'detail view'.

Tags

Select the tags that allow this item to be found as a related item when another item is displayed

Find Others Mandatory Tags

When this item is displayed, another item will be found as a related item if it has ALL of these tags set

Find Others Option Tags

When this item is displayed, another item will be found as a related item if it has ANY OF these tags set. These tags operate in addition to any 'Find Others Mandatory Tags' set

Link names

Name(s) for direct hyperlinks to this item. Separate multiple link names with ';'. e.g. if 'fred;fred.html' is entered, entering a URL of $BASEURL$/fred or $BASEURL$/fred.html into a browser will show this item directly.

Additional Header Content

Advanced Use Only.

This content will be copied directly into the <head> section of the page's HTML.

A 'USE' macro can be used to copy the Additional Header Content from another item.

The format of the USE macro is $USE;Page:English/Who We Are/About Us$.

Where:

 Page - the type of item (e.g. Page, Product, Article)

 English/Who We Are/ - the names of the parent Pages (for Pages), or the category path (for Products, Articles etc.)

 About Us - the name of the item, e.g. the Page's 'Name' field or Article's 'Heading' field.

Where the Additional Header Content from the other item is wrapped in <nouse>....</nouse> tags then the section inside the <nouse> tags will be ignored.

Title

It is recommended to provide this field for Best Practice to improve each Event

Title displayed in title bar of browser. Defaults to Name if blank

As a guide a title of 55 characters with reasonably few capital letters is 95% likely to be viewable in Google results without being cut short

Description

It is recommended to provide this field for Best Practice to improve each Event

Search Engine Meta tag Description

Recommended maximum length 240 characters

Note: In 2017 and before the recommended limit was 150.

Add to Search Engine Site Map file

This field is mandatory.

It is recommended to provide this field for Best Practice to improve each Event

Set to add an entry to the file used by search engines to locate pages on the Web Site when published

Include in Search Database

This setting determines if the page appears in the search database and therefore can be found via a Site Search Item. If left as 'Default', the page will be included if 'Show on Site Menus' is set

Additional Search Text

Enter additional words, such as plurals or common misspellings, that are not part of the content to enable this item to be found using the site search facility

Post Types

Select the post types that can be used for this content item.

Detail Page

Select a page containing detailed information, downloads, etc. for the event if any

Locations

Select the Location(s) where this Event takes place

Types

Select the Type(s) that apply to this Event

Venue

The venue at which this event will be held.

Bookable

This field is mandatory.

Whether or not booking is currently enabled for this event.

Set Capacity

This field is mandatory.

If set, then the event will use the capacity specified below in the 'Capacity' field.

If not set, then the event will use the capacity specified in its venue if one has been selected.

Capacity

The total number of seats that may be booked. Leave blank for unlimited bookings

Booking Field Set

The set of fields that must be filled in when booking a place at this event.

Attendee Field Set

This field is mandatory.

The set of fields that must be filled in for each attendee when booking a place at this event.

Field sets with no fields are not shown in this list.

Settle Balance After Event

When set the full price is due after the Event has taken place.

An optional deposit payment may be taken, some or all of which may be refundable if it exceeds the price of the event

Deposit Amount

An optional deposit payment per attendee when 'Settle Balance After Event' is set.

Price Adjustment

Select a price adjustment to use or select '(Default)' to use the default adjustment

Stock Type

Select a Stock Type to determine the stock level messages that are output for this item

Vouchers

Select vouchers that apply to this item. In addition vouchers selected for the category are also included.

Booking Quantity Minimum

The minimum number of attendees that may be added to each booking. Leave blank for default

Booking Quantity Multiple

The minimum extra quantity of attendees that must be added to each booking once the minimum quantity has been reached. Leave blank for default

Booking Quantity Maximum

The maximum number of attendees that may be added to each booking. Leave blank for default

Buy Action

Where the user will be taken after they have booked the event

Requires Delivery

Set if the physical tickets will be sent and so the booking process should allow a delivery address (separate to the billing address) to be specified

Requires Billing Address

Determines whether or not to show the 'Billing Address' section in the checkout.

If any one of the items in a user's basket require the billing address, then that section will be shown.

If this item has a price or requires delivery, or the checkout is set to silent login, then this value is ignored and assumed to be 'Yes'.

Yes - This item requires the 'Billing Address' section in the checkout

No - This item does not require the 'Billing Address' section in the checkout

Tax Rate

Select the tax rate applicable for this event

Tax Country

Where an item must be bought with the VAT of a country that is not the default country.

The basket can only exist in one Tax Country at a time, such that the entire basket is charging UK VAT, or the entire basket is charging Italian VAT (IVA).

Where an item such as italian event tickets need to be sold with Italian VAT, this field allows 'Italy' to be selected.

Where a visitor places a subsequent item into a basket, if the Tax Country doesn't match it will be rejected.

Where an item has a Tax Country, the VAT and basket VAT will be calculated and displayed in that Tax Countries VAT.

Currency

The currency this item must be bought in.

When set and when this item is added to the basket, the basket currency is changed to this currency.

When this item is in the basket, it will not be possible to change the basket to any other currency

Nominal Code

The nominal code if different to the default defined in the category settings

Department

The department if different to the default defined in the category settings

Cost Centre

The cost centre code if different to the default defined in the category settings

Booking End Time

The time that booking will be automatically disabled.

Book Time Value

This field is mandatory.
The time (in the units specified by the 'Book time unit' field) before the end date that booking will be disabled.

Show 'Minimum Attendees' Heading

This field is mandatory.
Whether to show the 'Minimum Attendees' heading above the minimum attendees on the booking form.

Show 'Additional Attendees' Heading

This field is mandatory.
Whether to show the 'Additional Attendees' heading above the additional attendees on the booking form.

Booking Created Message

When an event's buy action is set to 'Stay on Page', this is the message to be displayed to a user when they click the 'Book' button on the booking form.

Booking Modified Message

When an event's buy action is set to 'Stay on Page', this is the message to be displayed to a user after they edit a booking using the 'Edit Booking' button.

Attribute Set

The attributes in the selected attribute set will be made available to this item