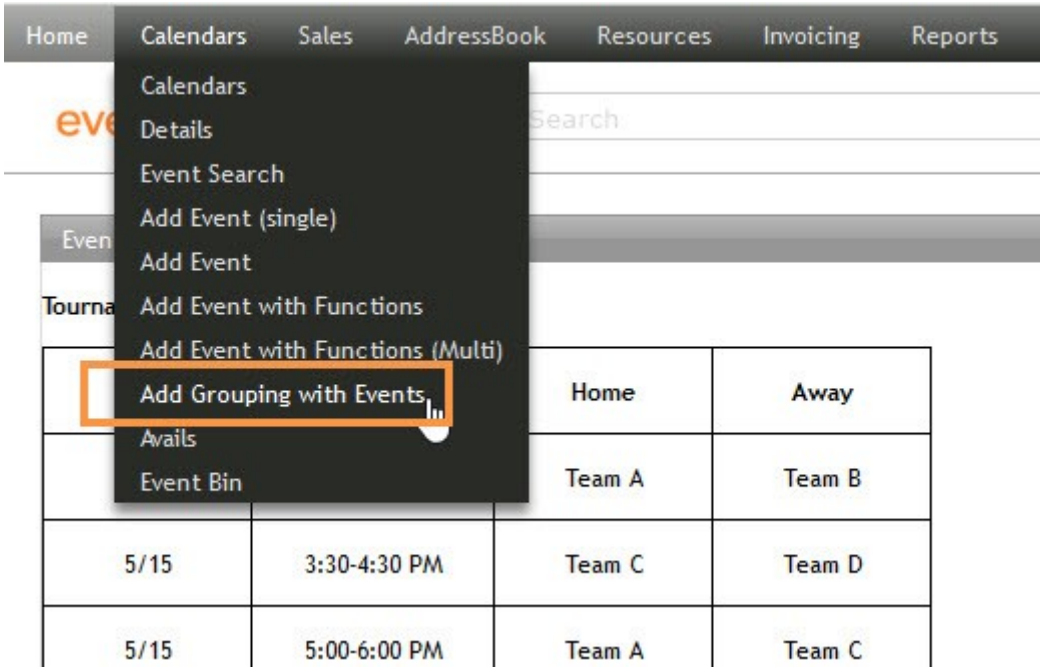
Adding a Grouping with Events

Updated: November 17, 2015

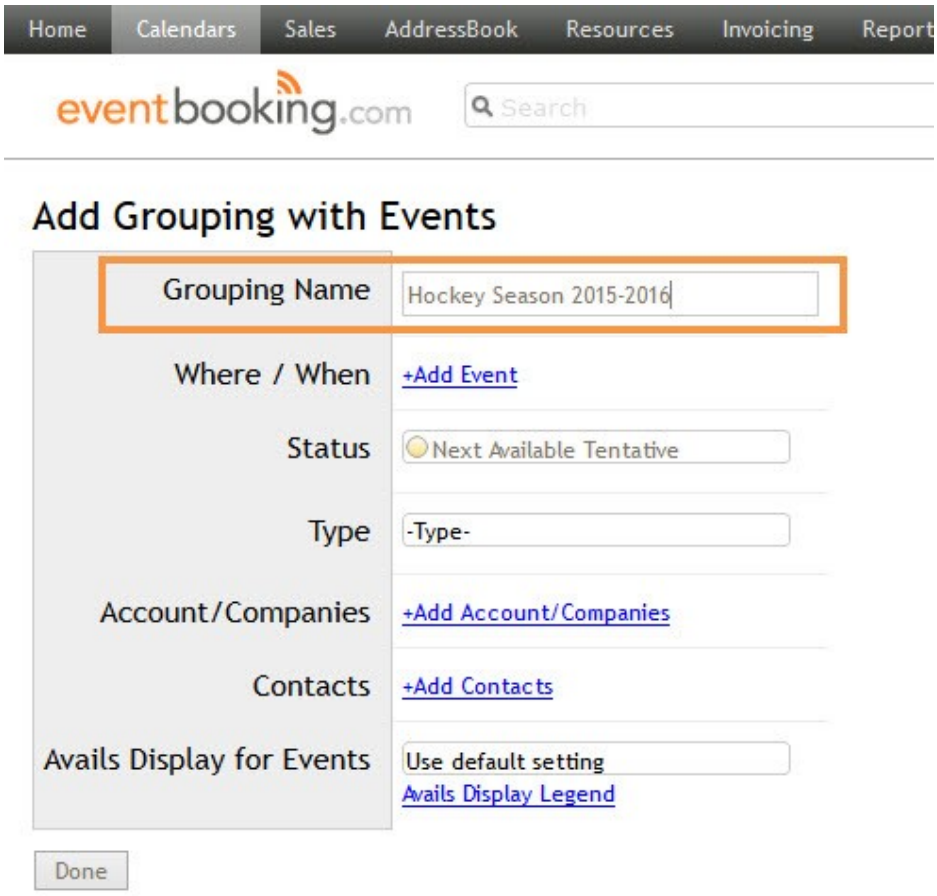
This article will walk you through adding a group of related or recurring events or holds to your calendar.

1. Hover over *Calendars* and click *Add Grouping with Events*.

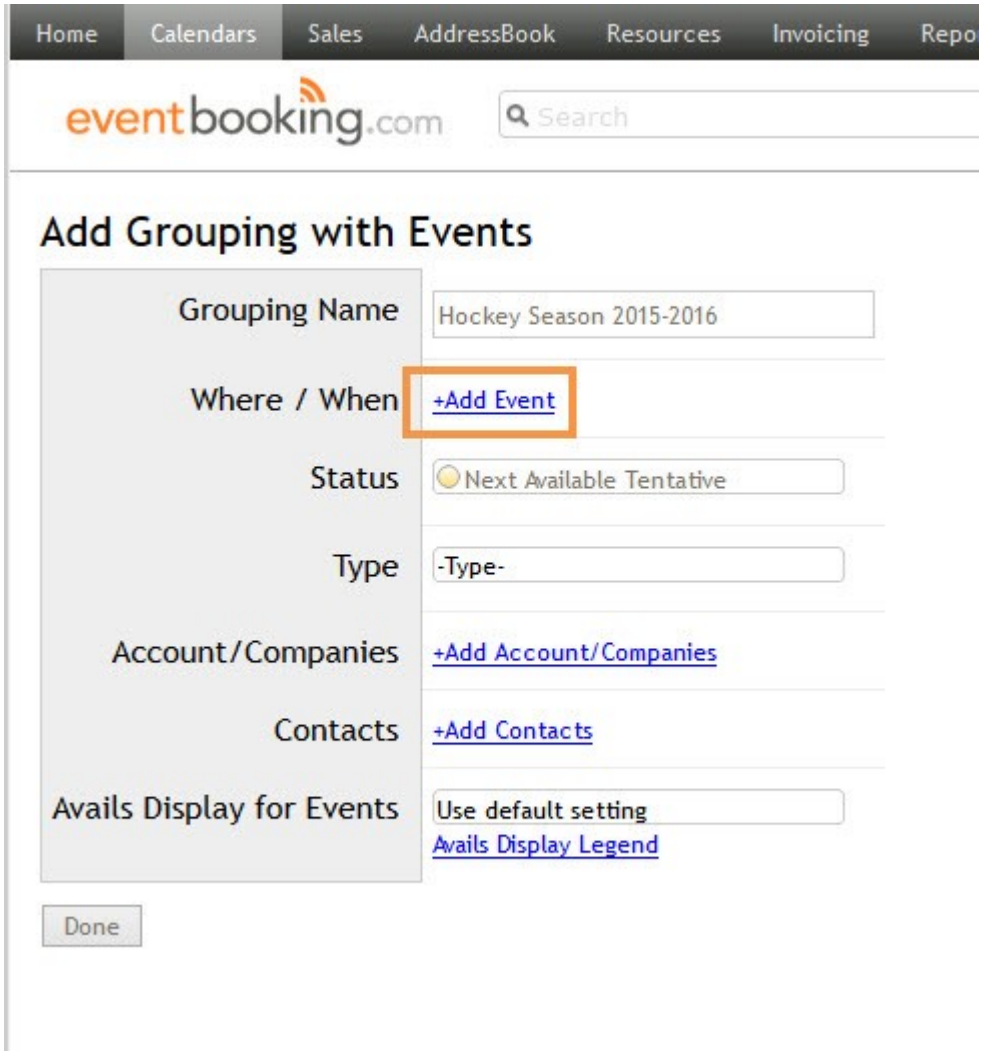


2. Enter the name of your Grouping. This can and often should be distinct from your event names, e.g. the grouping would be titled Hockey Season 2015-2016 and your events would be titled Hockey Game.

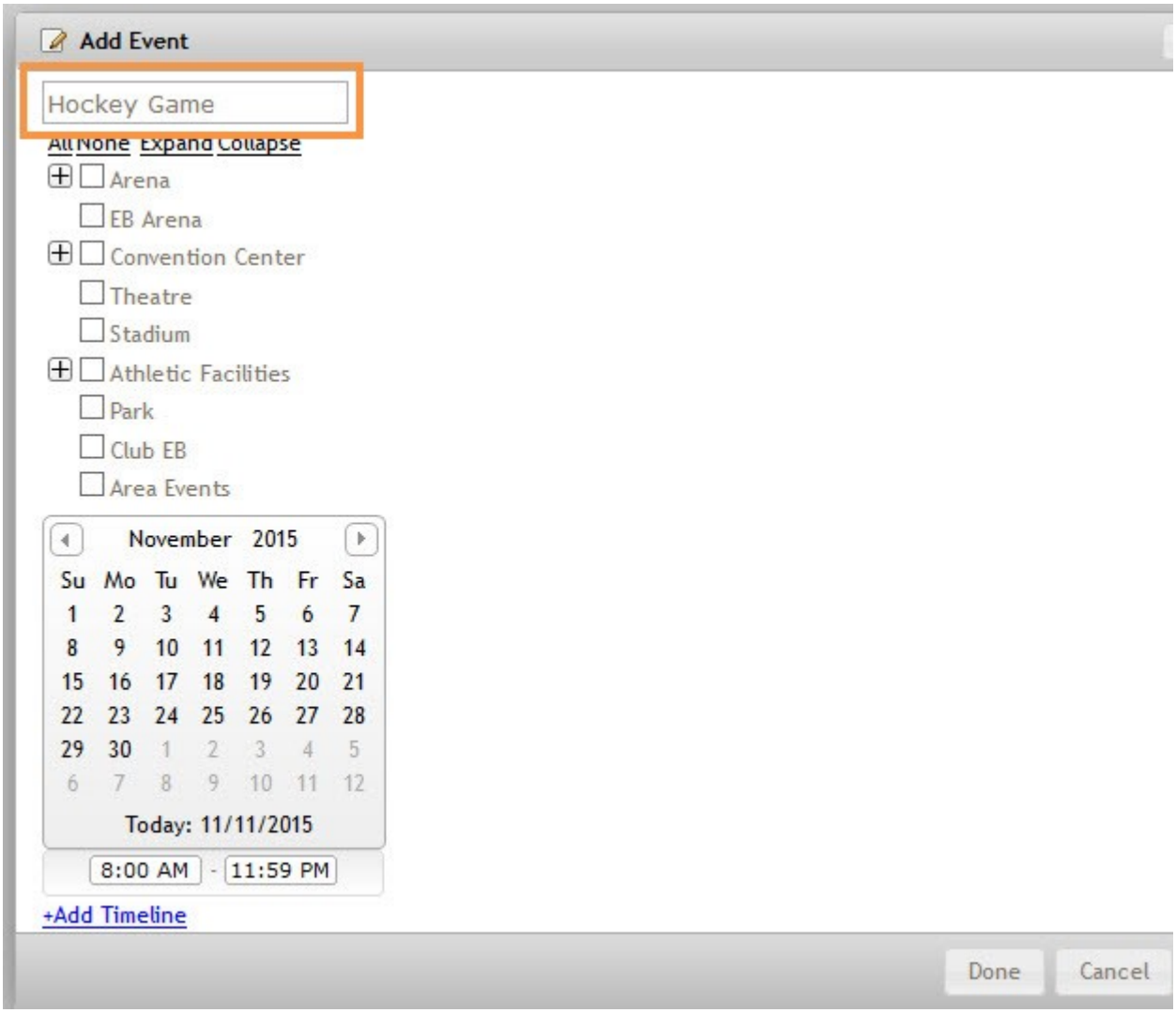
Your Add Event form may be customized with additional fields.



3. Click *+Add Event*.

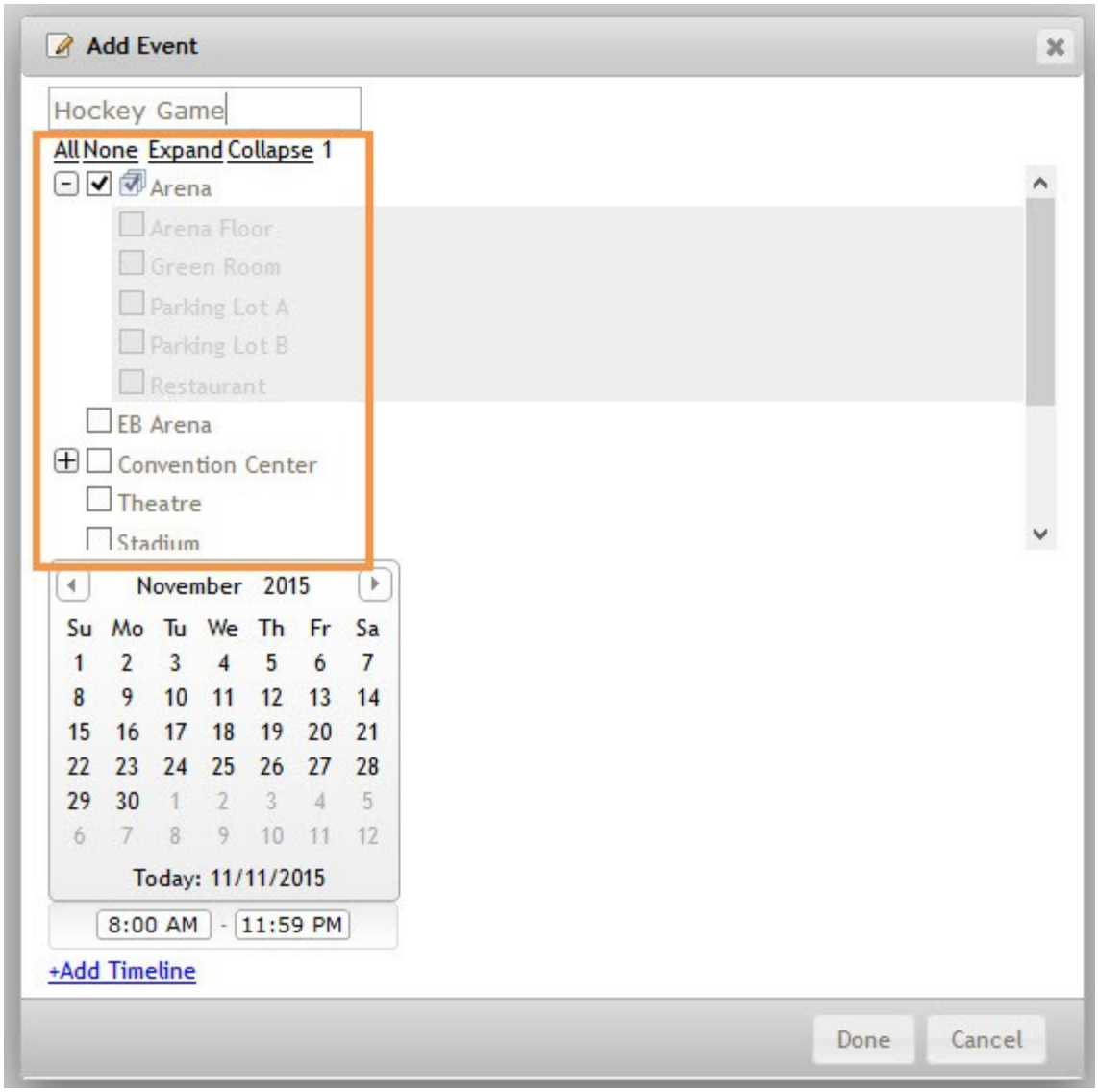


4. Name your events. If you leave this box blank, your events will inherit the name of the Grouping.

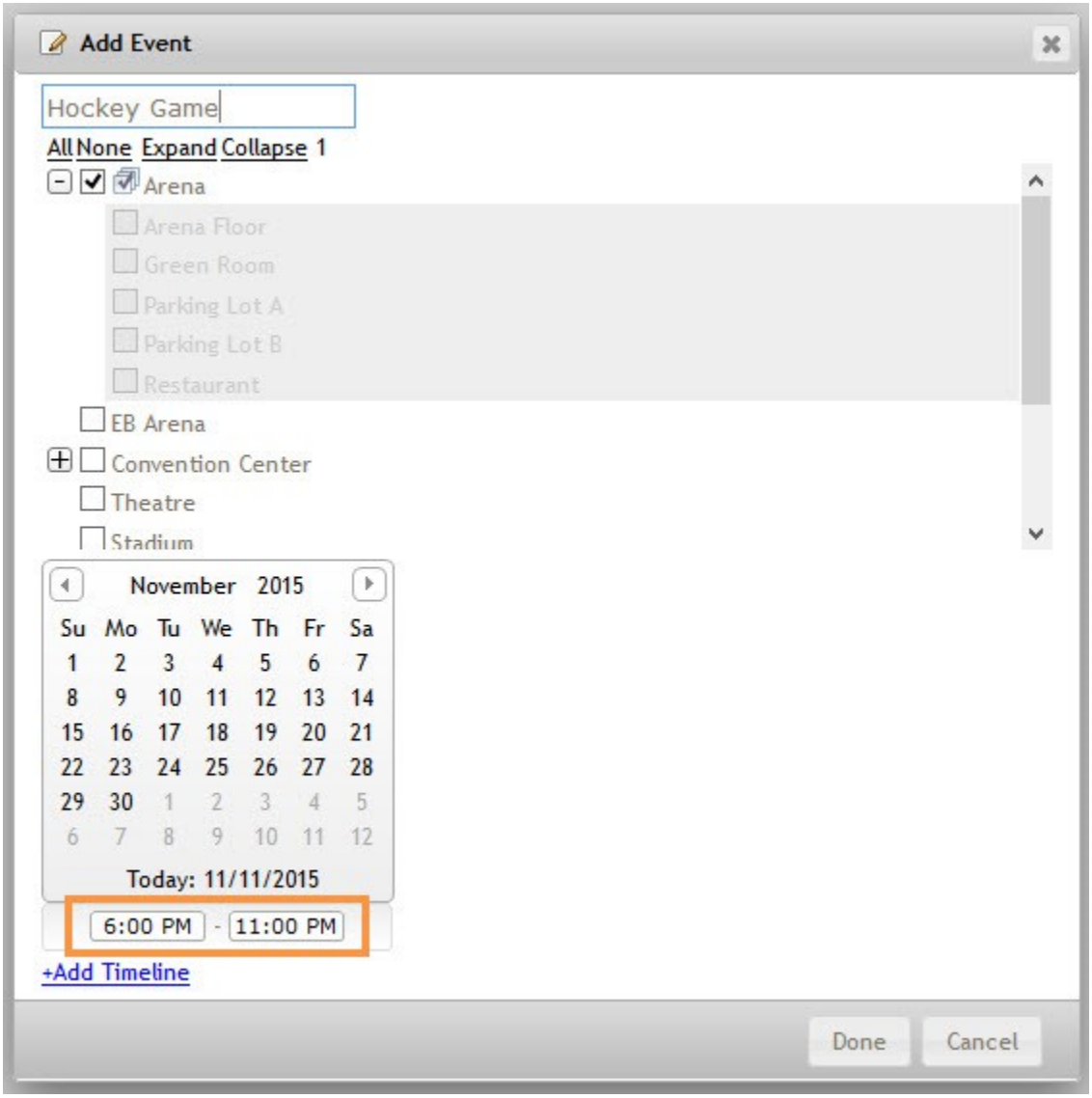


5. Check the spaces where you would like to book your events.

Note: All your events will be booked in the same space. If one or more of your events are in a different space, you can add them once you've finished adding these events.

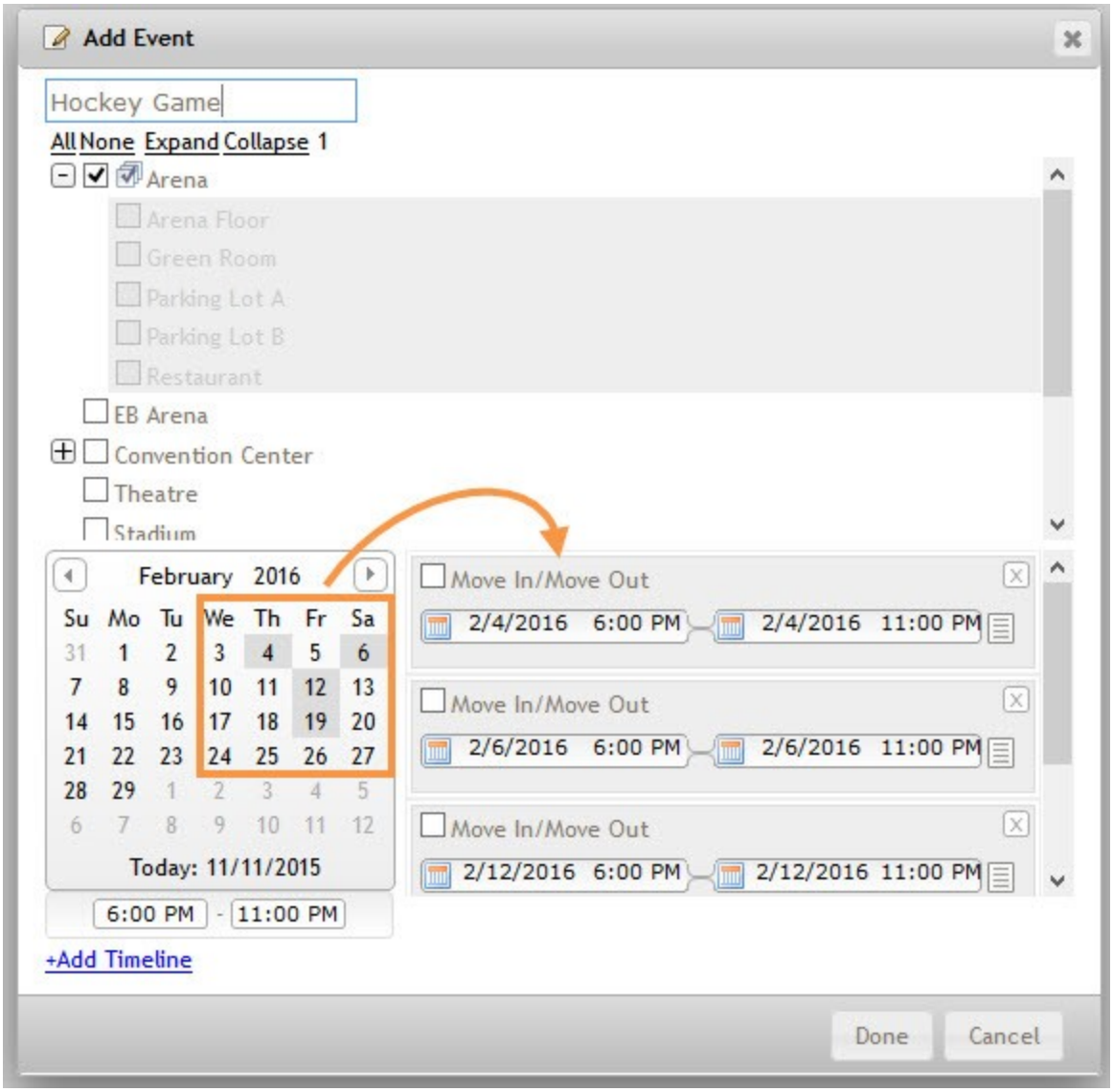


6. If your events have the same times, update the time. The time in the box below the calendar will be applied to all your events (it can be edited before saving).



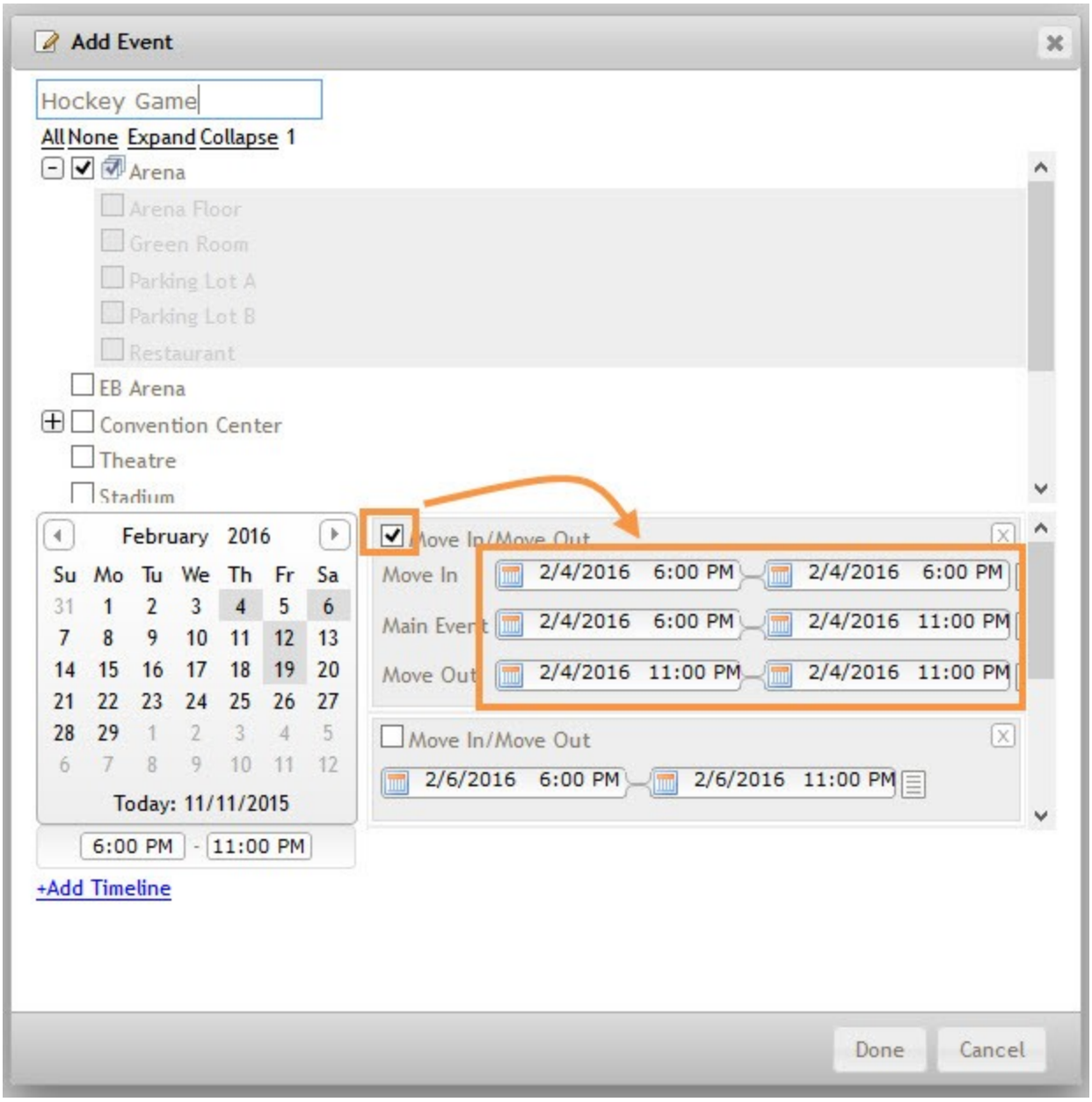
7. Select each event date; a separate line item will appear for each event you are booking. You can book dates over multiple months by using the arrow keys to move forward or backward by month. Any date(s) you have selected will be preserved.

Be careful not to click and drag if you need adjacent dates - you'll select a date range rather than individual dates!

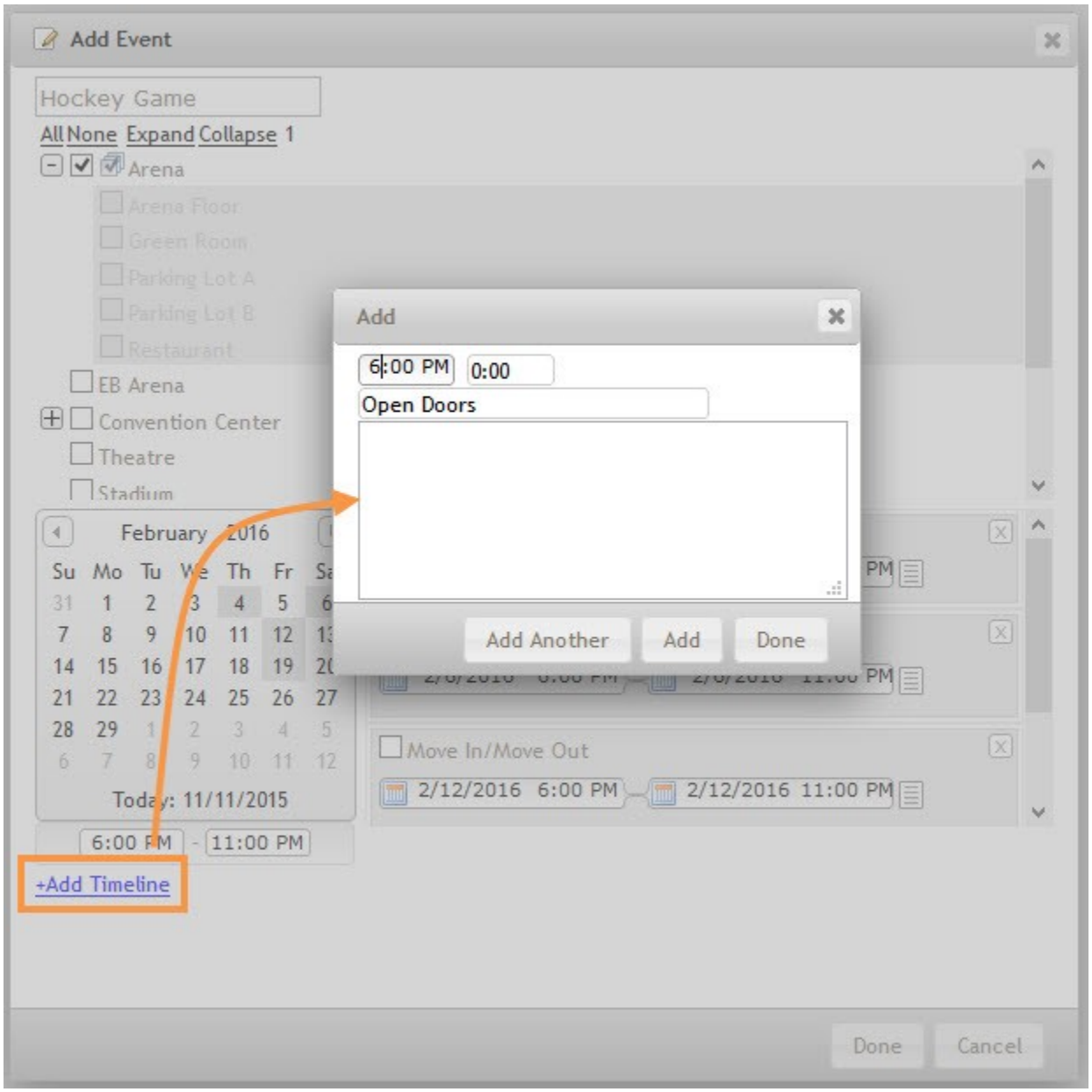


8. If you would like to separate the Move In/Move Out dates/times from the Main Event dates/times, click the box by *Move In/Move Out*. Update the dates and times as needed.

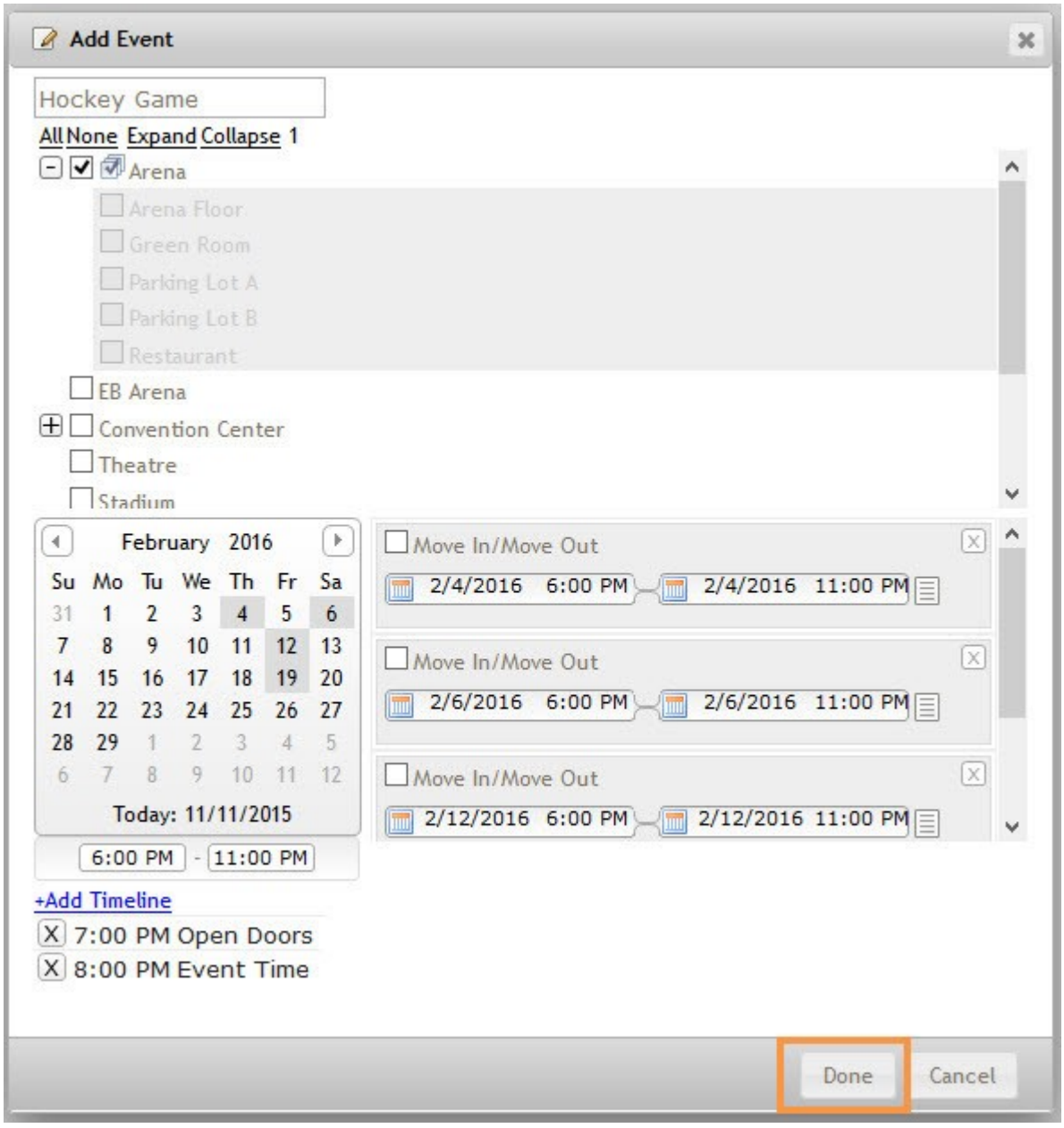
Note: *As you update the dates and times, they may overlap and the calendar will alert you to the conflict. Once you update all your dates and times so that they no longer overlap, the warning will go away.*



9. You can also click *+Add Timeline* to apply a timeline such as show times or load-in times to each event.

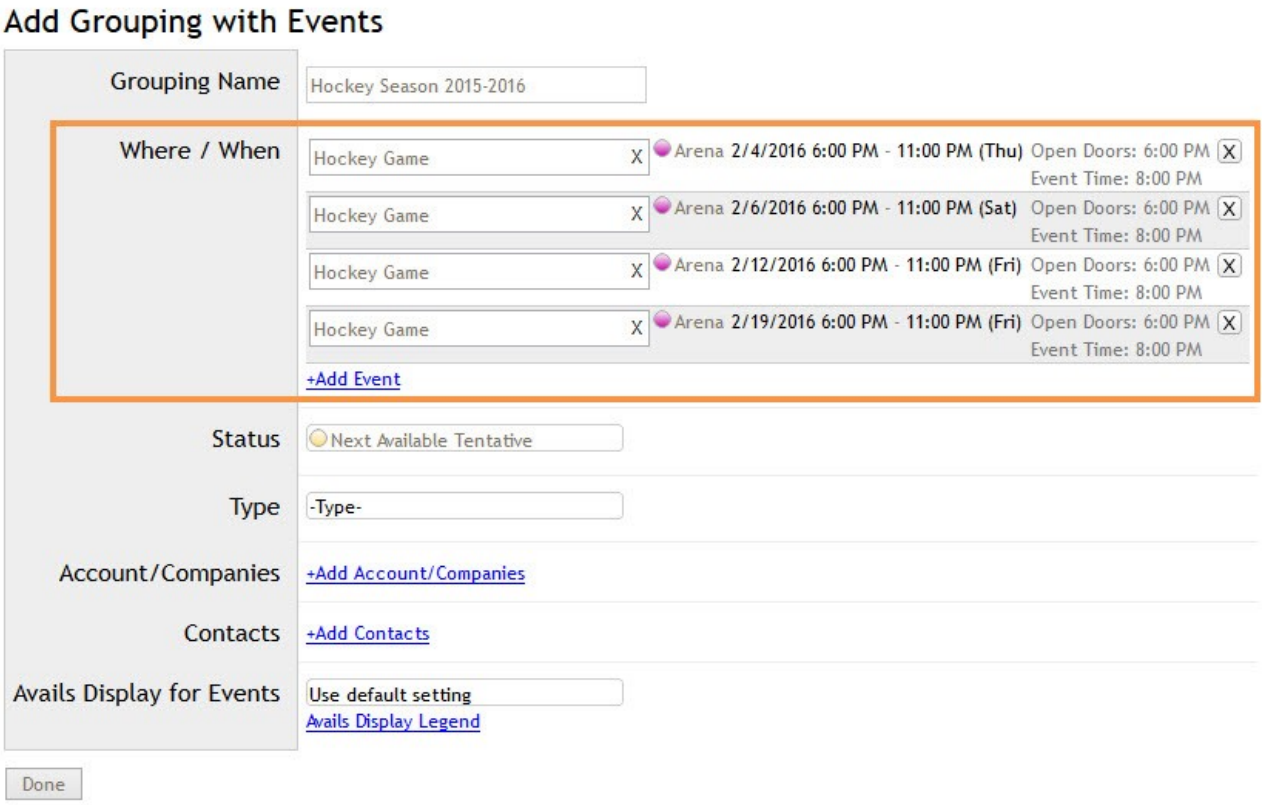


10. Once your spaces, dates, and times are all entered as you wish, click *Done*.



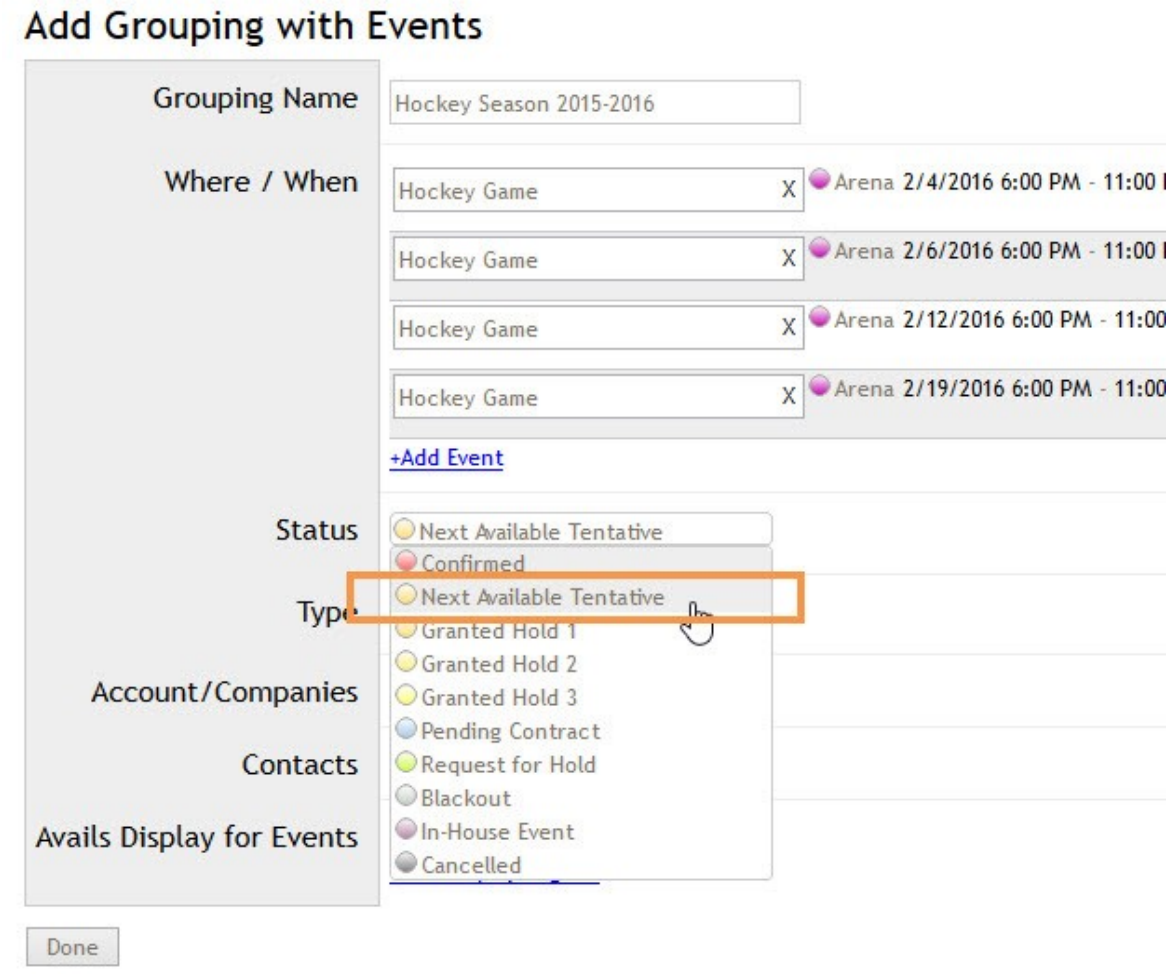
11. You will see a list of your events and event information. You may edit the event name if you wish.

If you need to add additional events to your grouping (including events in different spaces), simply click +Add Event again and follow the steps above. If you've made an error and need to remove an event, click the X *to the far right of the event (not the* X *by the event's name).*



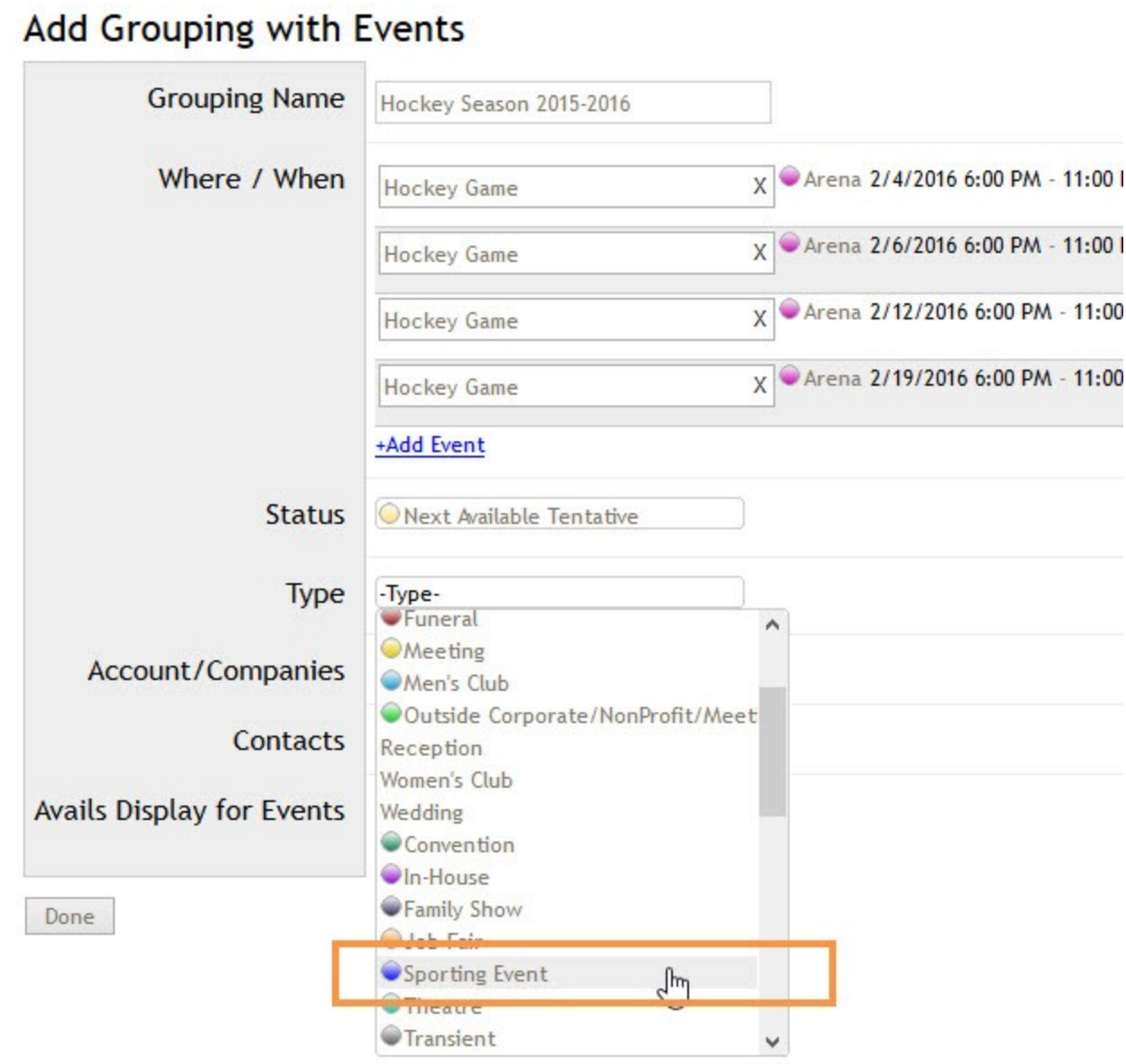
12. Choose the status of your events from the drop down list.

If you are adding a group of holds, we recommend using Next Available Tentative. *It will choose the next open hold for each date. For example, if there is already a Granted Hold 1 on one of the dates you are booking that event will be booked as a Granted Hold 2, but if there are no holds on a date, that event will be booked as a Granted Hold 1.*

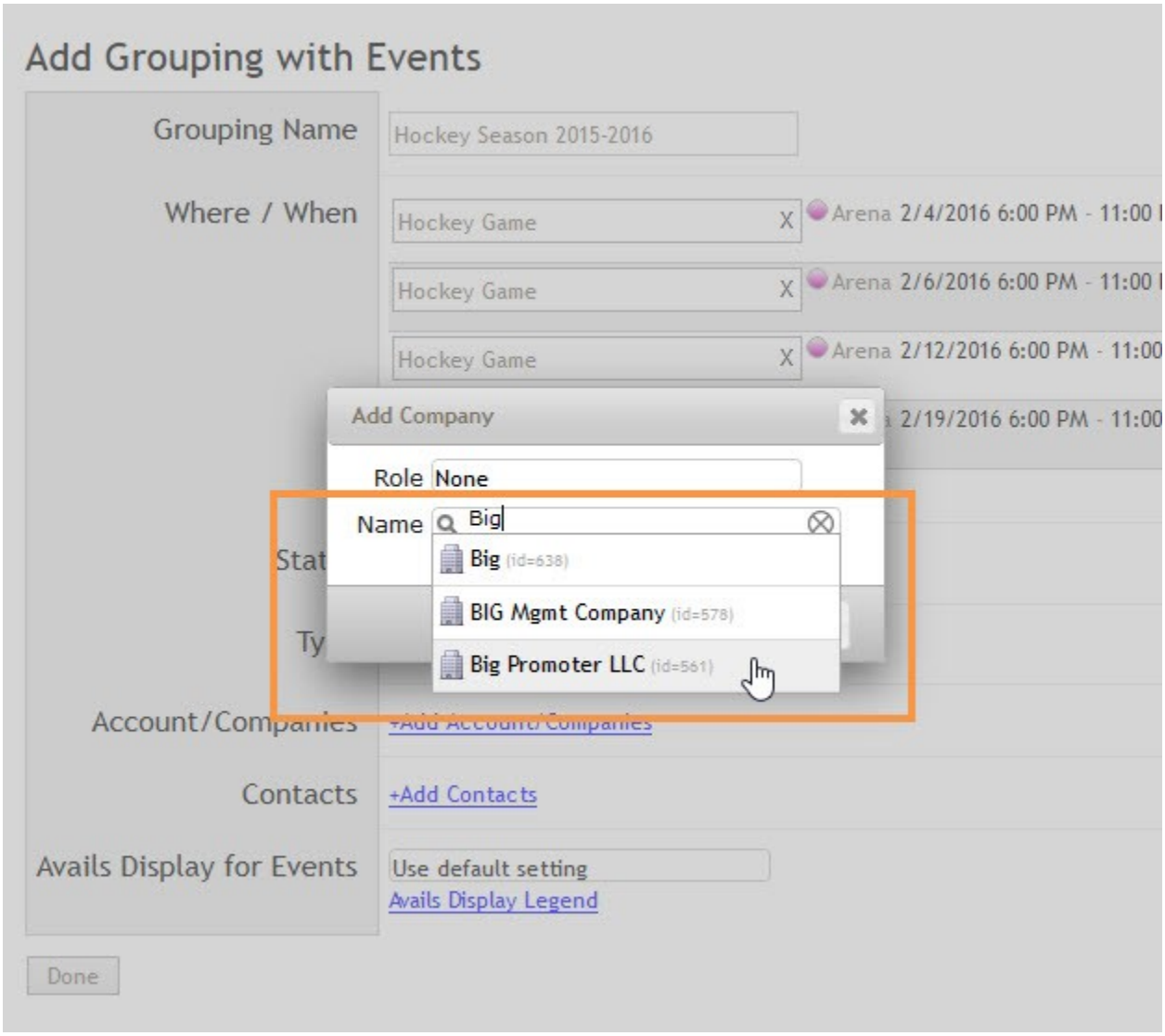


13. Select your event type.

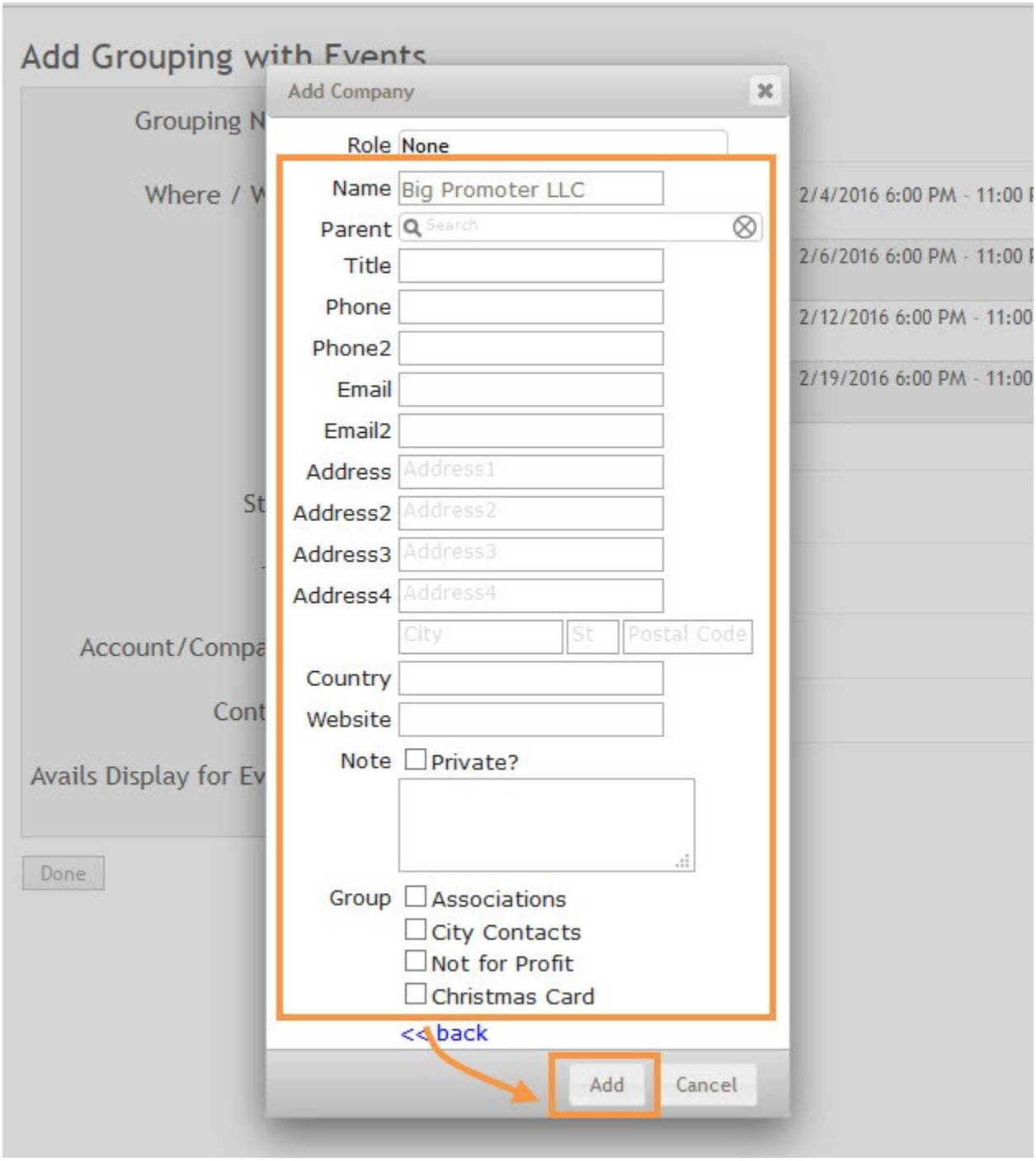
Depending on your avails settings, some events will show the Event Type on your avails reports. This list may be customized for your venue (certain accounts that are a part of a venue network may have restrictions).



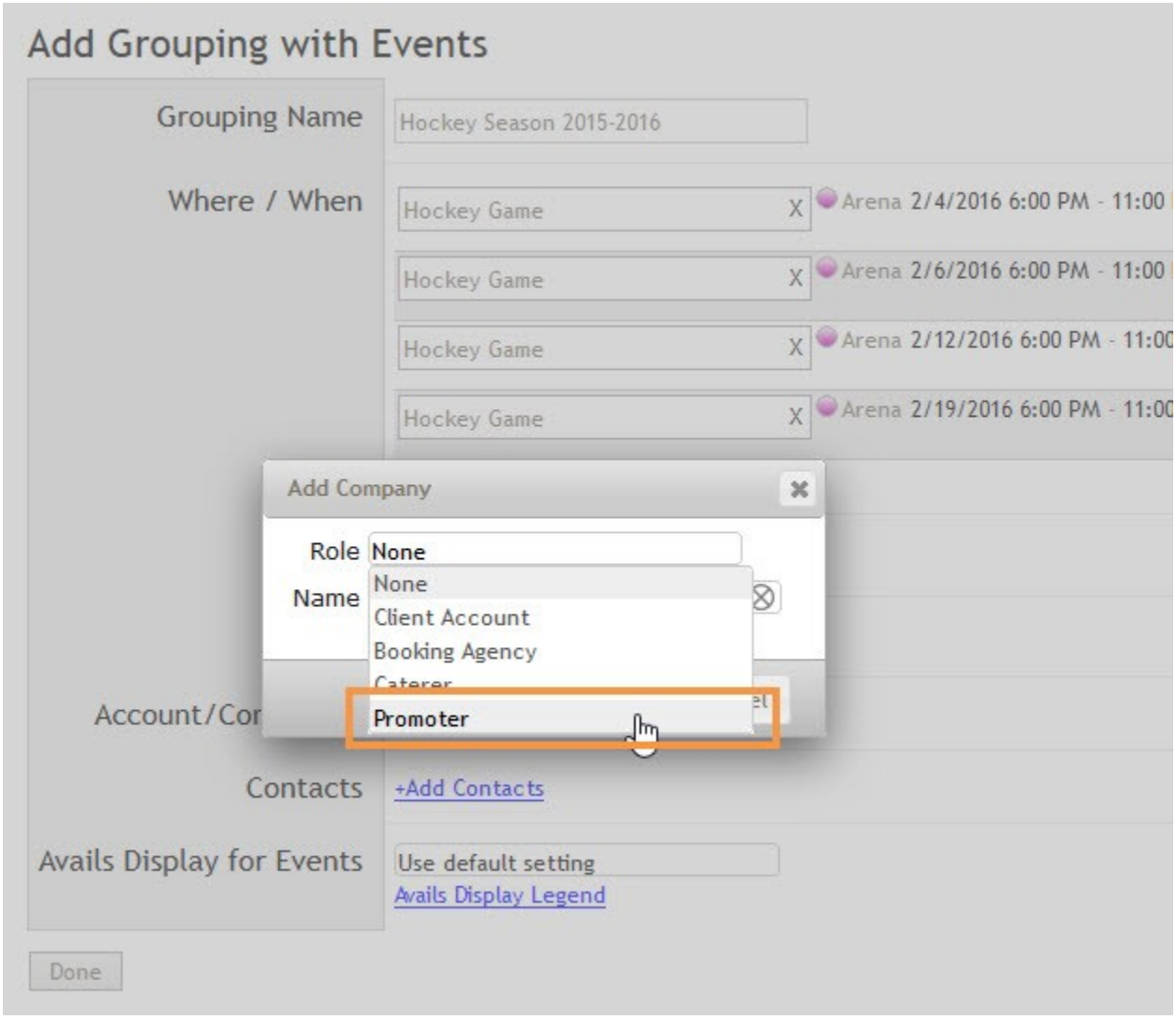
14. Attach a contact from your address book. Click *+Add Account/Company*. Type the name of the company you are working with to search for *Company* address book objects in your account. Click on the company you wish to attach to your event.



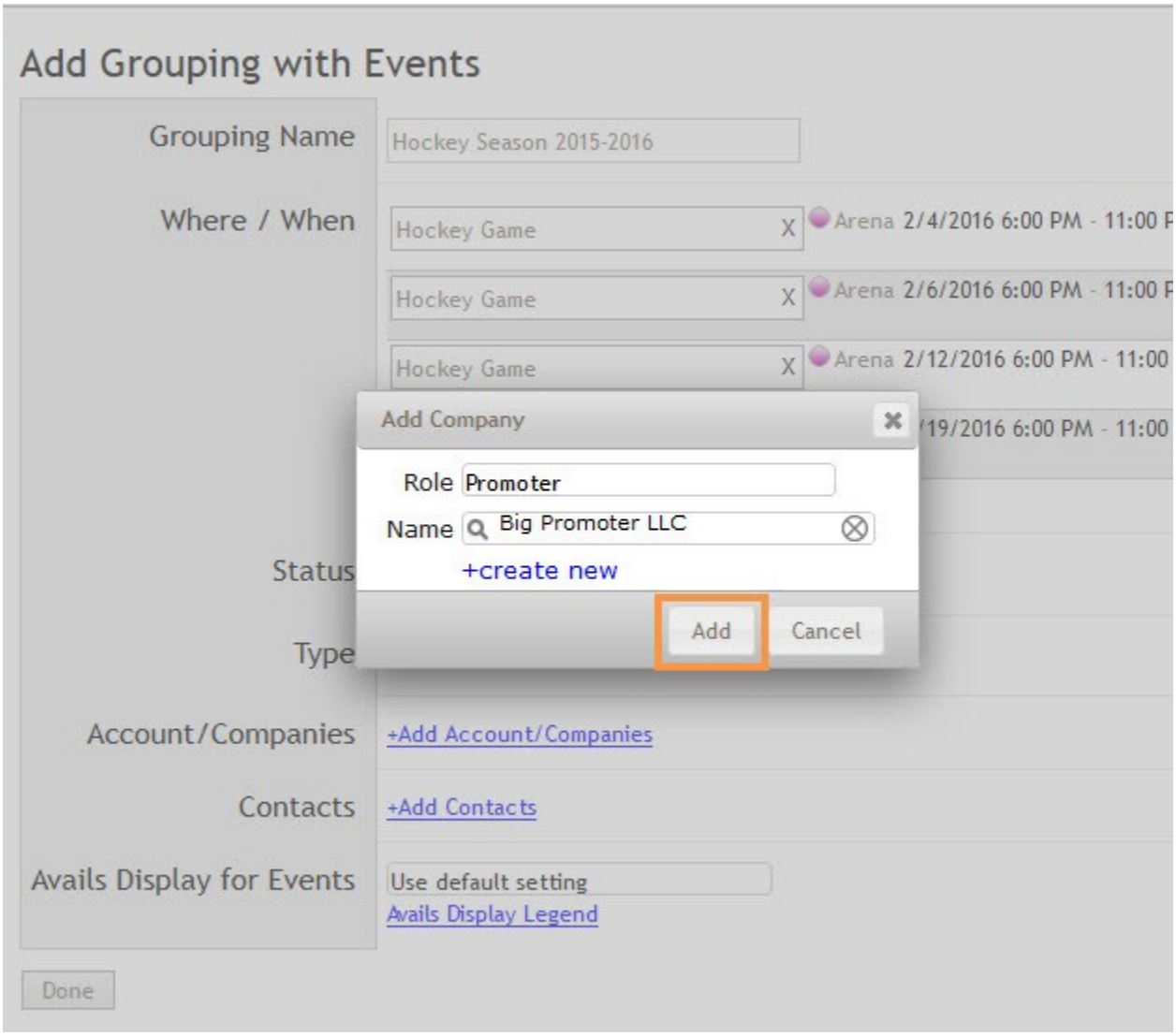
15. If the company doesn't appear in your search, you can click *+create new* to add a new contact to your address book. Fill out your new contact's information and click *Add*.



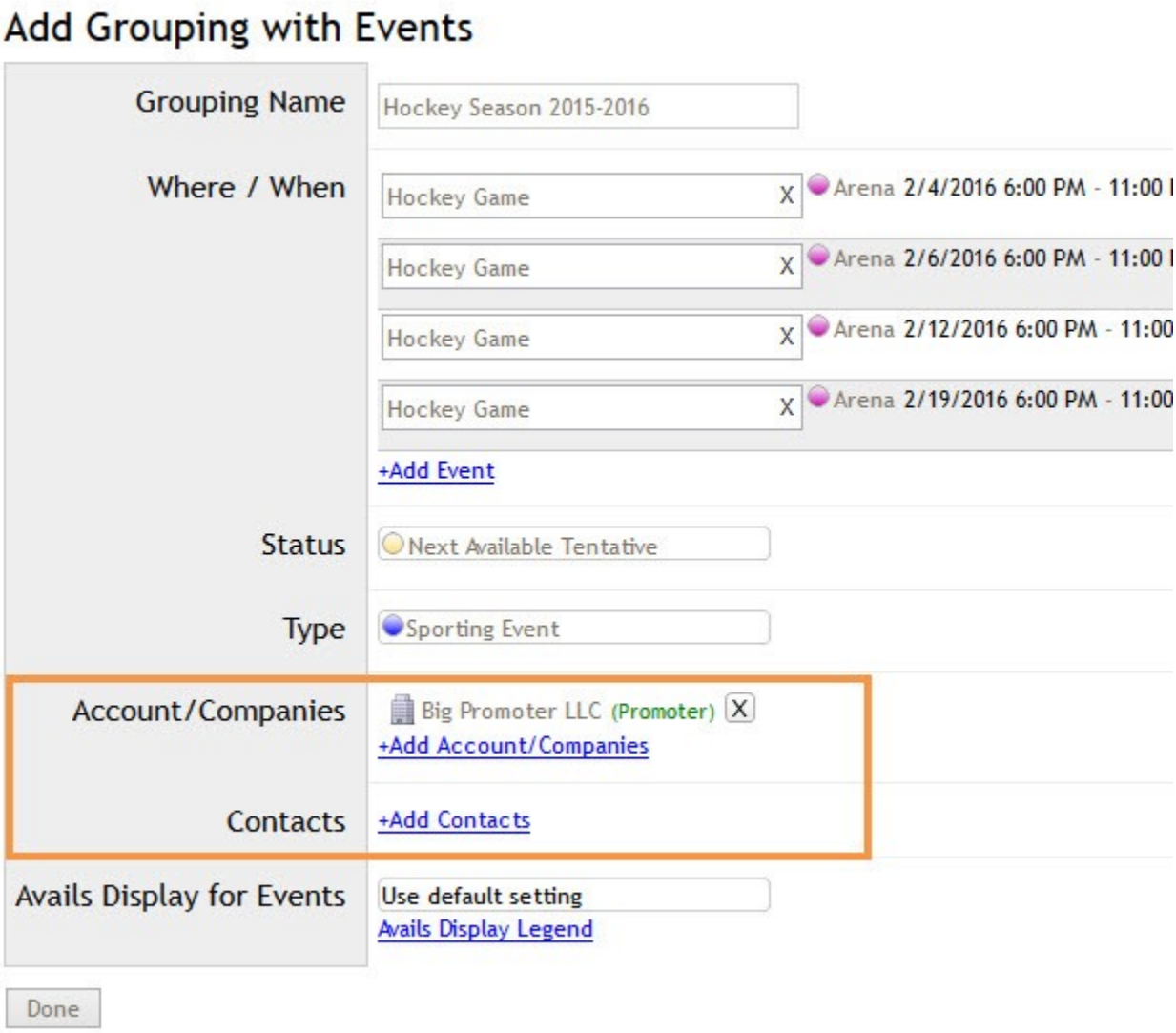
16. You may also assign a *Role* to the company from the drop down list. This role is often used in reports and custom forms, and can be customized for your account.



17. Click *Add* to finish adding your contact to your event.

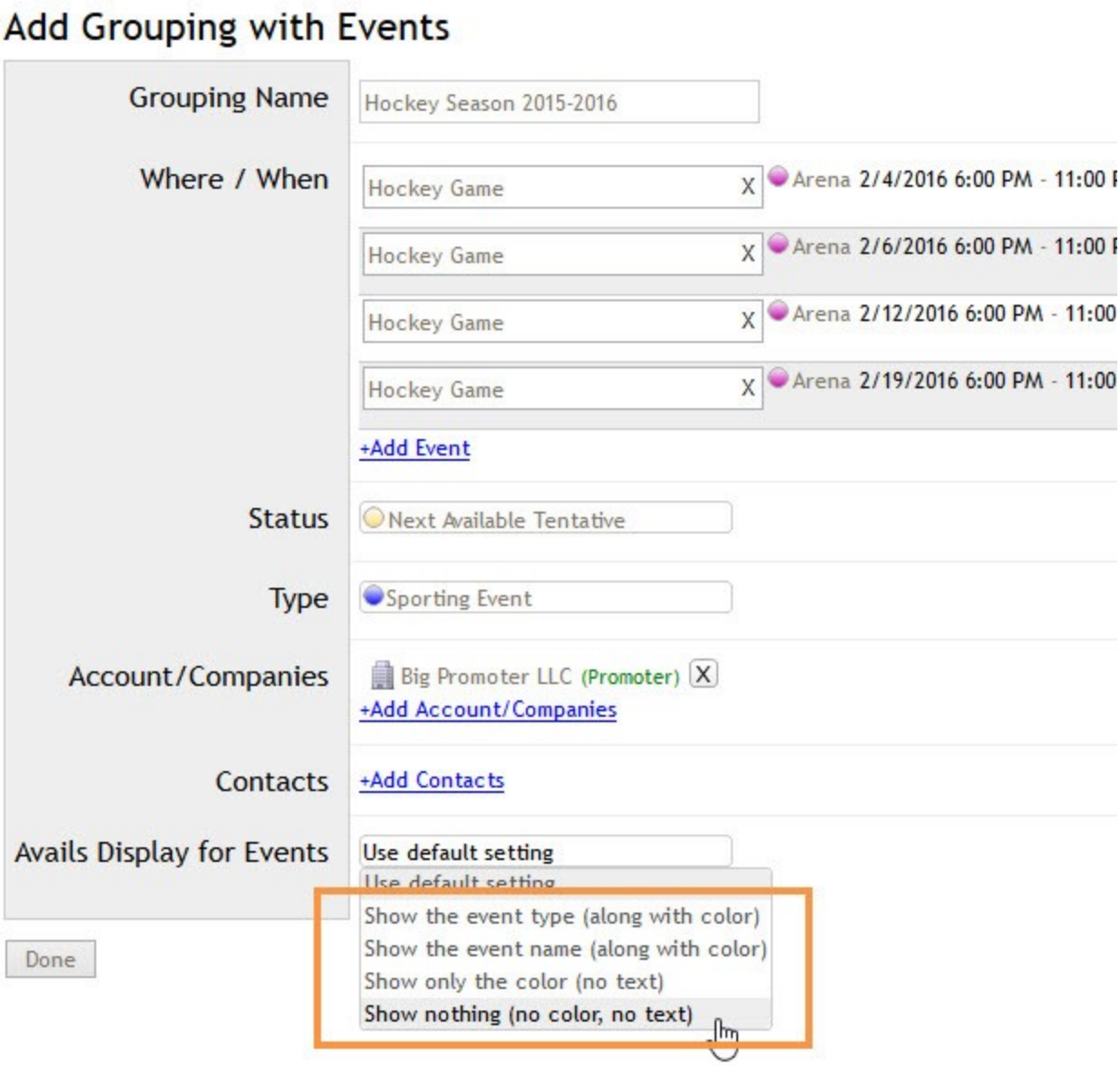


18. Click *+Add Contacts* and repeat the above steps to add a person to your event.

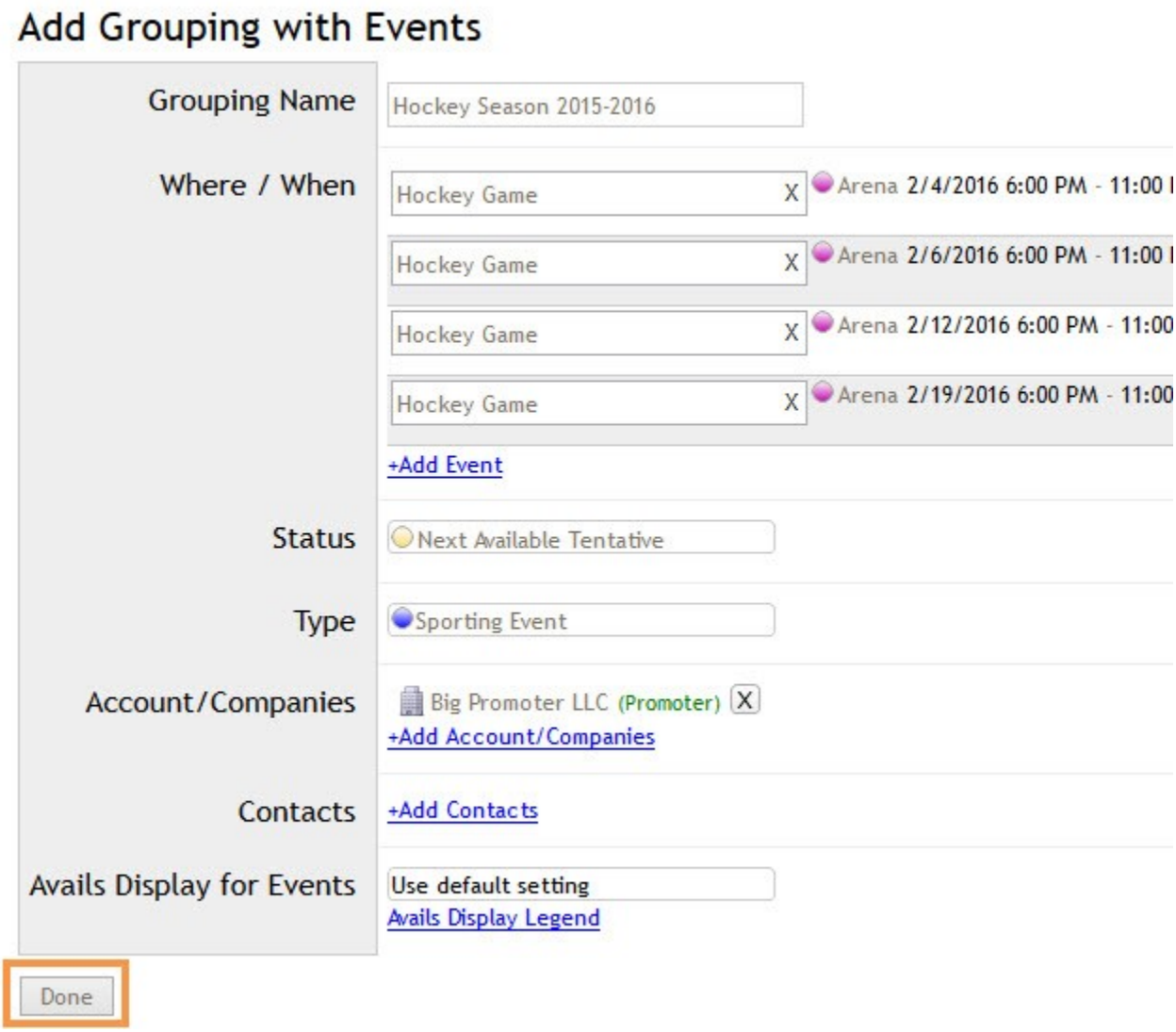


19. If you wish this event to appear differently in your avails than it would by default, you may edit that in the drop down.

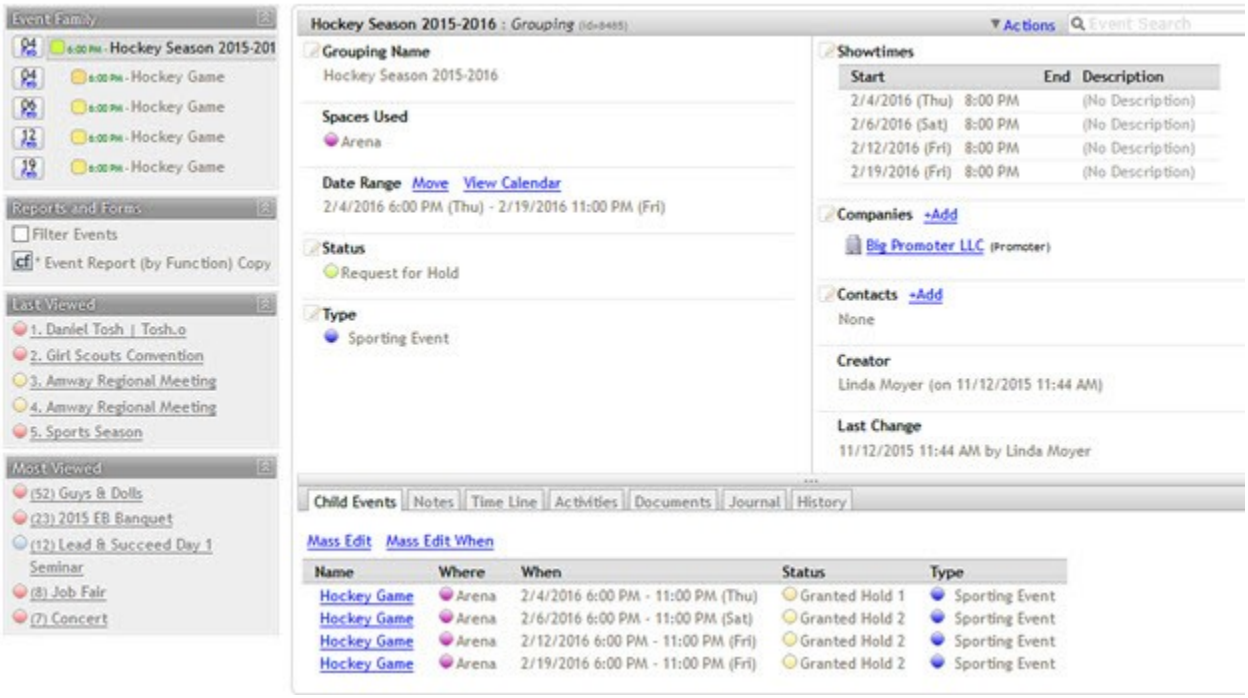
If you are not sure what your avails display default is, click Avails Display Legend *for the key. If you would like to modify your default avails settings, please contact us.*



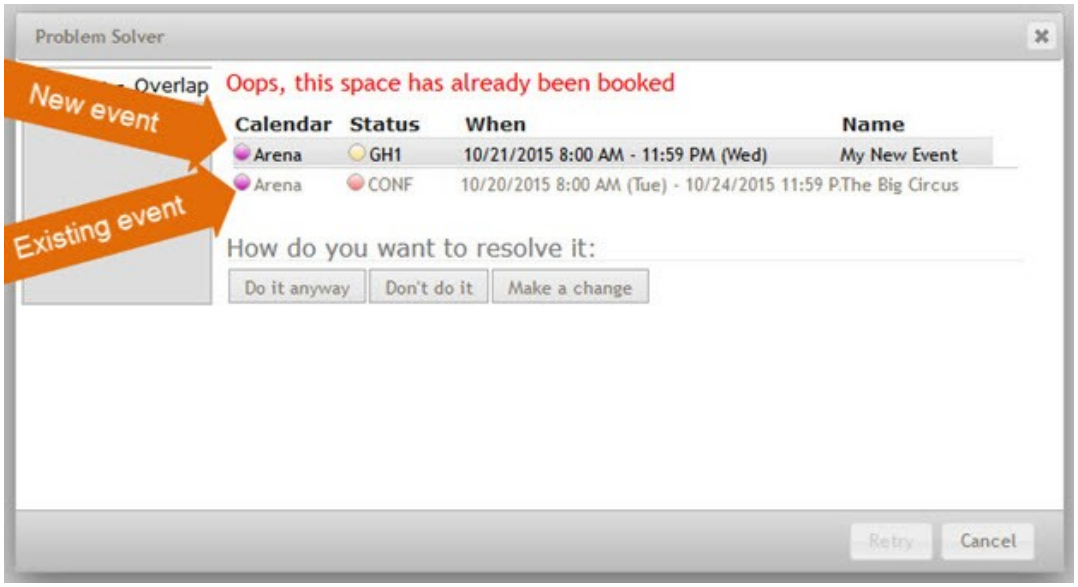
20. When all your event information is as you wish, click *Done* to create your grouping and book your events.

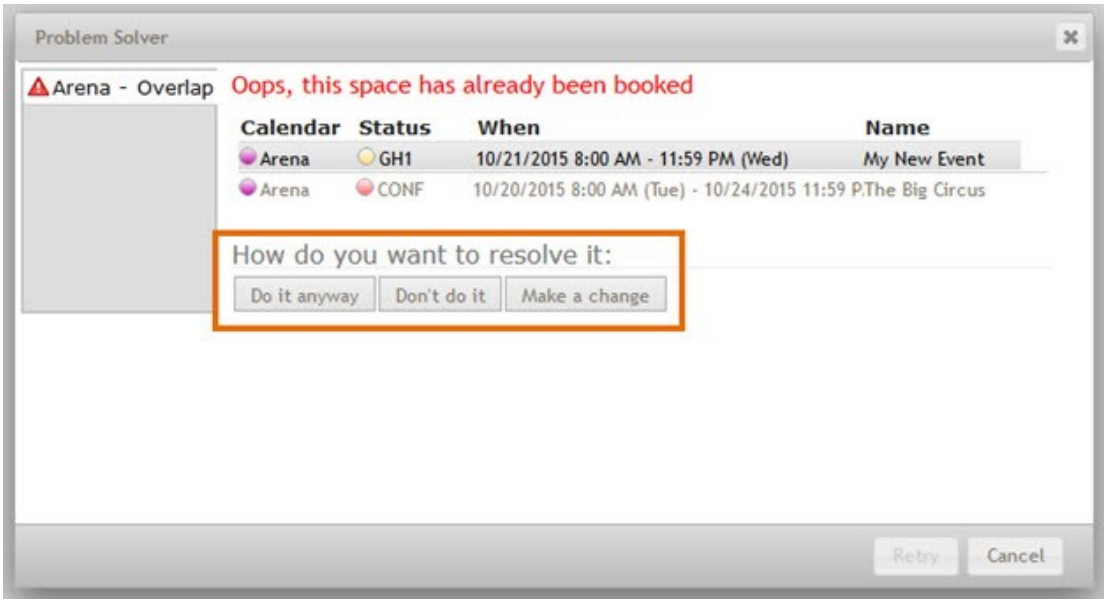


21. Your grouping has been created and your events are booked.



If the space you are attempting to book is already booked at that time, you will receive an alert from the conflict checker. The first event listed is the event you are attempting to add. The second event is the existing event that it is conflicting with.



You have three options at this point:

- Click *Don't do it* and then *Retry*. This will cancel adding the event and return you to the *Add Event* form.
- Click *Make a Change*. This will allow you to choose a different status and/or a different date and time. Once you updated the event information, click *Retry* to book your event.
- Click *Do it Anyway*. This option will double-book your space. Not all accounts have this option.