

Adding an Event with Functions/Sub-Events

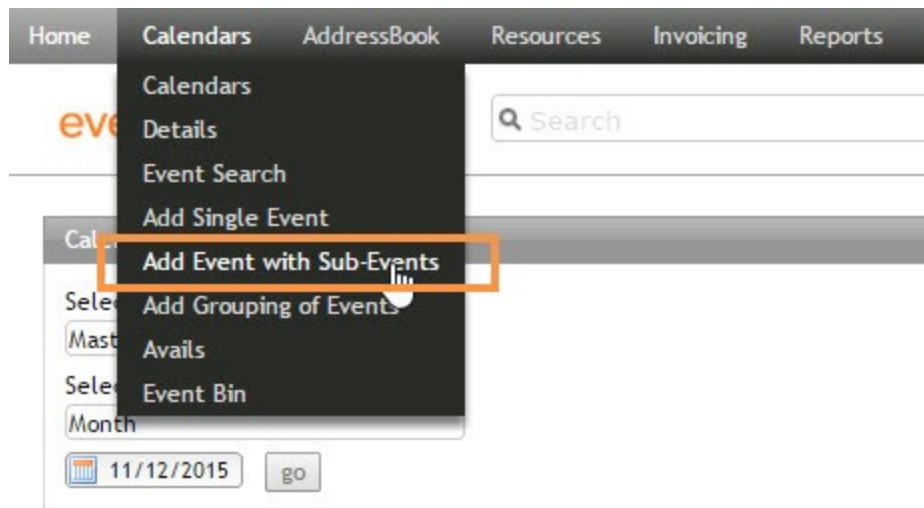
Updated: November 17, 2015

This article will walk you through booking an event with functions.

- By using functions, you will be able to add detailed information for each space for each day of your event.
- If you are booking an event that will need functions but you don't have that information yet, you can [book the event as a single event](#) and then [add your functions to that event](#) later.

1. Hover over *Calendars* and click on *Add Event with Functions*. This option may be labelled as *Add Event with Sub-Events* in your account.

Function and Sub-Event are both terms used in the events industry. We have some accounts that use Function and some that use Sub-Event. Both terms refer to the same feature set.



2. Enter the name of your event.

Your form may be customized with additional fields.

Add Event with Functions

Event Name	<input type="text" value="My Conference"/>
Where / When	+Add Sub-Event
Status	<input type="radio"/> Next Available Tentative
Type	<input type="text" value="-Type-"/>
Account/Companies	+Add Account/Companies
Contacts	+Add Contacts
Notes	<div></div>
Avails Display	<input type="text" value="Use default setting"/> Avails Display Legend

Done

3. Click *+Add Sub-Event* to add your first Function/Sub-Event.

Add Event with Functions

Event Name	<input type="text" value="My Conference"/>
Where / When	+Add Sub-Event
Status	<input type="text" value="Next Available Tentative"/>
Type	<input type="text" value="-Type-"/>
Account/Companies	+Add Account/Companies
Contacts	+Add Contacts
Notes	<div></div>
Avails Display	<input type="text" value="Use default setting"/> Avails Display Legend

Done

4. Name the Function/Sub-Event.

Add Sub-Event

Breakfast

AllNoneExpandCollapse

Arena

EB Arena

Convention Center

Theatre

Stadium

Athletic Facilities

Park

Club EB

Area Events

November 2015

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5
6	7	8	9	10	11	12

Today: 11/12/2015

8:00 AM

-

9:00 AM

+Add Timeline

Done

Cancel

5. Check the space where your function/sub-event will be held.

Add Sub-Event

Breakfast

[All](#) [None](#) [Expand](#) [Collapse](#) 1

☐ Arena

☐ EB Arena

☒ Convention Center

☒ Ballroom

- ☐ Ballroom A
- ☐ Ballroom A+B
- ☐ Ballroom A+B+C
- ☐ Ballroom A+B+C+D
- ☐ Ballroom B
- ☐ Ballroom B+C

November 2015

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5
6	7	8	9	10	11	12

Today: 11/12/2015

8:00 AM - 9:00 AM

[+Add Timeline](#)

Done Cancel

6. Update the time of your function/sub-event.

Add Sub-Event

Breakfast

[All](#) [None](#) [Expand](#) [Collapse](#) 1

- ☐ Arena
 - ☐ EB Arena
 - ☒ Convention Center
 - ☒ Ballroom
 - ☐ Ballroom A
 - ☐ Ballroom A+B
 - ☐ Ballroom A+B+C
 - ☐ Ballroom A+B+C+D
 - ☐ Ballroom B
 - ☐ Ballroom B+C

November 2015

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5
6	7	8	9	10	11	12

Today: 11/12/2015

8:00 AM - 9:00 AM

[+Add Timeline](#)

Done Cancel

7. Select the date of your function/sub-event. If you have the same function on multiple dates, you may select all those dates. A separate line item will appear for each event your are booking, and a separate function will be created for each line item.

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

Add Sub-Event

Breakfast

All None Expand Collapse 1

- ☐ Arena
- ☐ EB Arena
- ☒ Convention Center
 - ☒ Ballroom
 - ☐ Ballroom A
 - ☐ Ballroom A+B
 - ☐ Ballroom A+B+C
 - ☐ Ballroom A+B+C+D
 - ☐ Ballroom B
 - ☐ Ballroom C

December 2015

Su	Mo	Tu	We	Th	Fr	Sa
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Today: 11/12/2015

8:00 AM - 9:00 AM

[+Add Timeline](#)

☐ Move In/Move Out

12/14/2015 8:00 AM 12/14/2015 9:00 AM

☐ Move In/Move Out

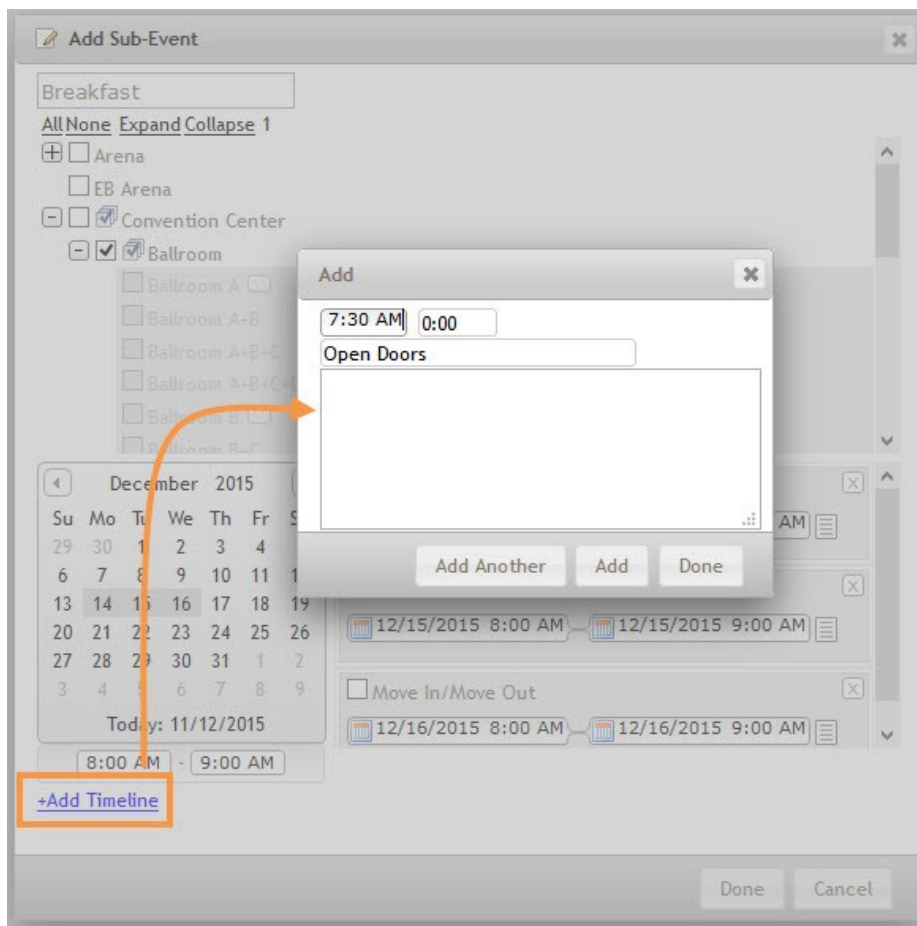
12/15/2015 8:00 AM 12/15/2015 9:00 AM

☐ Move In/Move Out

12/16/2015 8:00 AM 12/16/2015 9:00 AM

Done Cancel

8. You can also click *+Add Timeline* to apply a timeline item to your function.



9. Once the space, date(s), and time(s) are entered as you wish, click *Done*.

Add Sub-Event

Breakfast

[All None](#) [Expand](#) [Collapse](#) 1

- ☐ Arena
- ☐ EB Arena
- ☒ Convention Center
 - ☒ Ballroom
 - ☐ Ballroom A
 - ☐ Ballroom A+B
 - ☐ Ballroom A+B+C
 - ☐ Ballroom A+B+C+D
 - ☐ Ballroom B
 - ☐ Ballroom B+C

December 2015

Su	Mo	Tu	We	Th	Fr	Sa
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Today: 11/12/2015

8:00 AM - 9:00 AM

[+Add Timeline](#)

- ☒ 8:00 AM Open Doors

Move In/Move Out

12/14/2015 8:00 AM - 12/14/2015 9:00 AM

Move In/Move Out

12/15/2015 8:00 AM - 12/15/2015 9:00 AM

Move In/Move Out

12/16/2015 8:00 AM - 12/16/2015 9:00 AM

Done Cancel

10. You will see a list of your functions. You may edit the function/sub-event name if you wish.

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).

Add Event with Functions

Event Name	<input type="text" value="My Conference"/>																
Where / When	<table><tr><td>Breakfast</td><td>X</td><td>Ballroom 12/14/2015 8:00 AM - 9:00 AM (Mon) Open Doors: 8:00 AM</td><td>X</td></tr><tr><td>Breakfast</td><td>X</td><td>Ballroom 12/15/2015 8:00 AM - 9:00 AM (Tue) Open Doors: 8:00 AM</td><td>X</td></tr><tr><td>Breakfast</td><td>X</td><td>Ballroom 12/16/2015 8:00 AM - 9:00 AM (Wed) Open Doors: 8:00 AM</td><td>X</td></tr><tr><td colspan="4">+Add Sub-Event</td></tr></table>	Breakfast	X	Ballroom 12/14/2015 8:00 AM - 9:00 AM (Mon) Open Doors: 8:00 AM	X	Breakfast	X	Ballroom 12/15/2015 8:00 AM - 9:00 AM (Tue) Open Doors: 8:00 AM	X	Breakfast	X	Ballroom 12/16/2015 8:00 AM - 9:00 AM (Wed) Open Doors: 8:00 AM	X	+Add Sub-Event			
Breakfast	X	Ballroom 12/14/2015 8:00 AM - 9:00 AM (Mon) Open Doors: 8:00 AM	X														
Breakfast	X	Ballroom 12/15/2015 8:00 AM - 9:00 AM (Tue) Open Doors: 8:00 AM	X														
Breakfast	X	Ballroom 12/16/2015 8:00 AM - 9:00 AM (Wed) Open Doors: 8:00 AM	X														
+Add Sub-Event																	
Status	<input type="text" value="Next Available Tentative"/>																
Type	<input type="text" value="-Type-"/>																
Account/Companies	+Add Account/Companies																
Contacts	+Add Contacts																
Notes	<div></div>																
Avails Display	<input type="text" value="Use default setting"/> Avails Display Legend																

Done

Be sure to select rooms separately to create a distinct function for each space! Note that in the screenshot in step 5 the top level Ballroom calendar was selected, so one function was created; this is correct because in this case the function is using the entire ballroom. In the example below, I've selected each Function Room because each one will be a separate breakout session and I need a separate sub-event for each so that I am able to list room setup, AV equipment, etc. for each space.

Add Sub-Event

Breakout Sessions

All None Expand Collapse 4

- ☐ Ballroom
- ☐ Boardrooms
- ☒ **Function Rooms**
 - ☒ Function Room 1 >>
 - ☒ Function Room 2 >>
 - ☒ Function Room 3 >>
 - ☒ Function Room 4 >>
- ☐ Exhibit Halls
- ☐ Gym

December 2015

Su	Mo	Tu	We	Th	Fr	Sa
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2
3	4	5	6	7	8	9

Today: 11/12/2015

1:30 PM - 4:30 PM

+Add Timeline

Move In/Move Out

12/14/2015 1:30 PM - 12/14/2015 4:30 PM

Move In/Move Out

12/15/2015 1:30 PM - 12/15/2015 4:30 PM

Move In/Move Out

12/16/2015 1:30 PM - 12/16/2015 4:30 PM

Done Cancel

11. Click **+Add Sub-Event** and follow the steps above to add the rest of your functions/sub-events.

Add Event with Functions

Event Name	<input type="text" value="My Conference"/>			
Where / When	Breakfast	X	Ballroom	12/14/2015 8:00 AM - 9:00 AM (Mon) Open Doors: 8:00 AM X
	Opening Session	X	Ballroom	12/14/2015 9:30 AM - 11:30 AM (Mon) X
	Lunch	X	Ballroom	12/14/2015 12:00 PM - 1:00 PM (Mon) X
	Breakout Sessions	X	Function Room 3	12/14/2015 1:30 PM - 4:30 PM (Mon) X
	Breakout Sessions	X	Function Room 1	12/14/2015 1:30 PM - 4:30 PM (Mon) X
	Breakout Sessions	X	Function Room 2	12/14/2015 1:30 PM - 4:30 PM (Mon) X
	Breakout Sessions	X	Function Room 4	12/14/2015 1:30 PM - 4:30 PM (Mon) X
	Breakfast	X	Ballroom	12/15/2015 8:00 AM - 9:00 AM (Tue) Open Doors: 8:00 AM X
	Lunch	X	Ballroom	12/15/2015 12:00 PM - 1:00 PM (Tue) X
	Breakout Sessions	X	Function Room 4	12/15/2015 1:30 PM - 4:30 PM (Tue) X
	Breakout Sessions	X	Function Room 2	12/15/2015 1:30 PM - 4:30 PM (Tue) X
	Breakout Sessions	X	Function Room 1	12/15/2015 1:30 PM - 4:30 PM (Tue) X
	Breakout Sessions	X	Function Room 3	12/15/2015 1:30 PM - 4:30 PM (Tue) X
	Breakfast	X	Ballroom	12/16/2015 8:00 AM - 9:00 AM (Wed) Open Doors: 8:00 AM X
	Lunch	X	Ballroom	12/16/2015 12:00 PM - 1:00 PM (Wed) X
	Breakout Sessions	X	Function Room 3	12/16/2015 1:30 PM - 4:30 PM (Wed) X
	Breakout Sessions	X	Function Room 1	12/16/2015 1:30 PM - 4:30 PM (Wed) X
	Breakout Sessions	X	Function Room 2	12/16/2015 1:30 PM - 4:30 PM (Wed) X
	Breakout Sessions	X	Function Room 4	12/16/2015 1:30 PM - 4:30 PM (Wed) X
	Closing Session	X	Theatre	12/16/2015 5:00 PM - 6:30 PM (Wed) X
+Add Sub-Event				

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

If you are adding a hold, we recommend using Next Available Tentative. It will choose the next open hold for your date.

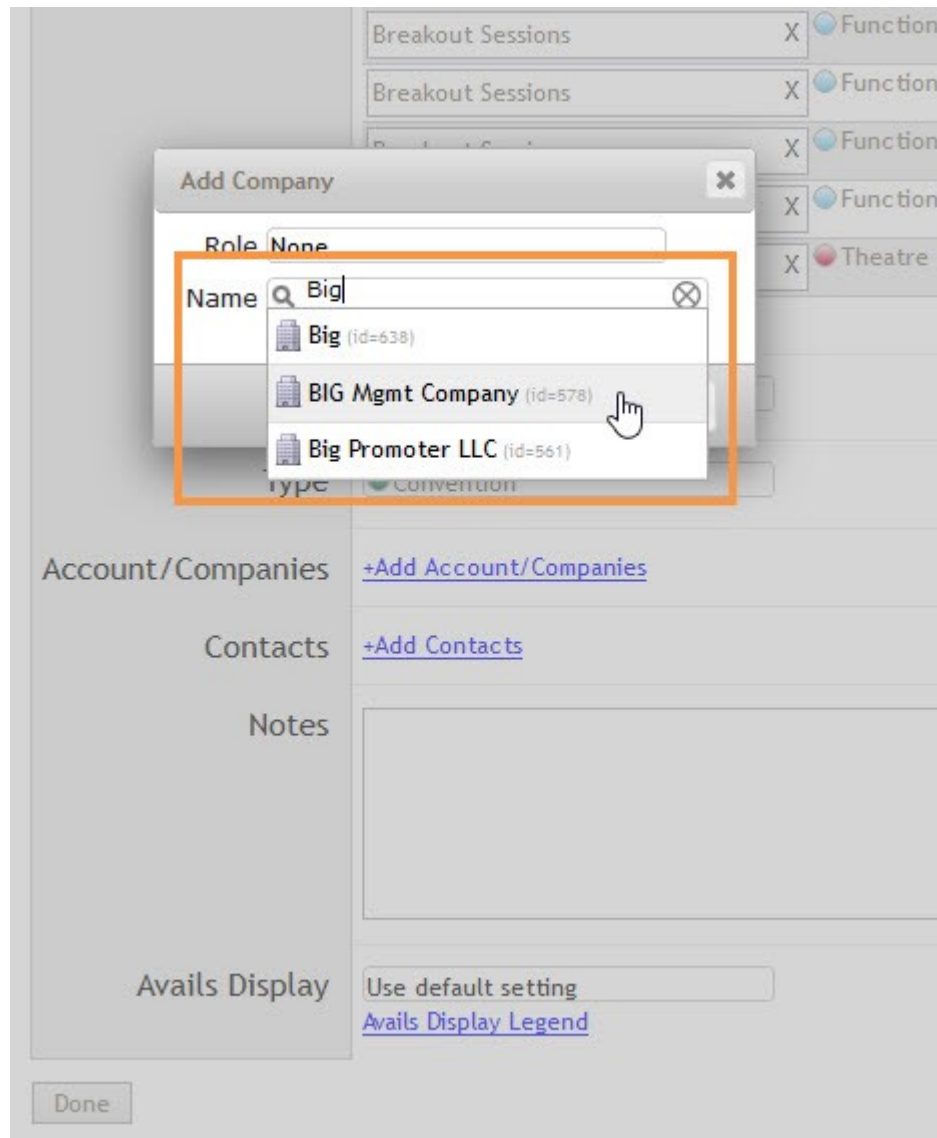
Breakout Sessions	X	Function Room 2	12/15/2015 1:30 I
	X	Function Room 1	12/15/2015 1:30 I
	X	Function Room 3	12/15/2015 1:30 I
	X	Ballroom	12/16/2015 8:00 ,
	X	Ballroom	12/16/2015 12:00
	X	Function Room 3	12/16/2015 1:30 I
	X	Function Room 1	12/16/2015 1:30 I
	X	Function Room 2	12/16/2015 1:30 I
	X	Function Room 4	12/16/2015 1:30 I
	X	Theatre	12/16/2015 5:00 I
	+Add Sub-Event		
Status	<div><div>Next Available Tentative</div><div>Confirmed</div></div>		
Type	<div><div>Next Available Tentative</div><div>Granted Hold 1</div><div>Granted Hold 2</div><div>Granted Hold 3</div><div>Pending Contract</div><div>Request for Hold</div></div>		
Account/Companies			
Contacts			
Notes			
Avails Display	<div>Use default setting</div> <div>Avails Display Legend</div>		

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).

Account/Companies	Breakout Sessions	X	Function Room 3 12/16/2015 1:30
	Breakout Sessions	X	Function Room 1 12/16/2015 1:30
	Breakout Sessions	X	Function Room 2 12/16/2015 1:30
	Breakout Sessions	X	Function Room 4 12/16/2015 1:30
	Closing Session	X	Theatre 12/16/2015 5:00
	+Add Sub-Event		
	Status	<input type="text" value="Next Available Tentative"/>	
Type	<input type="text" value="-Type-"/>		
Contacts	<div><div>Wedding</div><div>Convention</div><div>In-house</div><div>Family Show</div><div>...</div></div>		
Notes	<div></div>		
Avails Display	<input type="text" value="Use default setting"/> Avails Display Legend		

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.



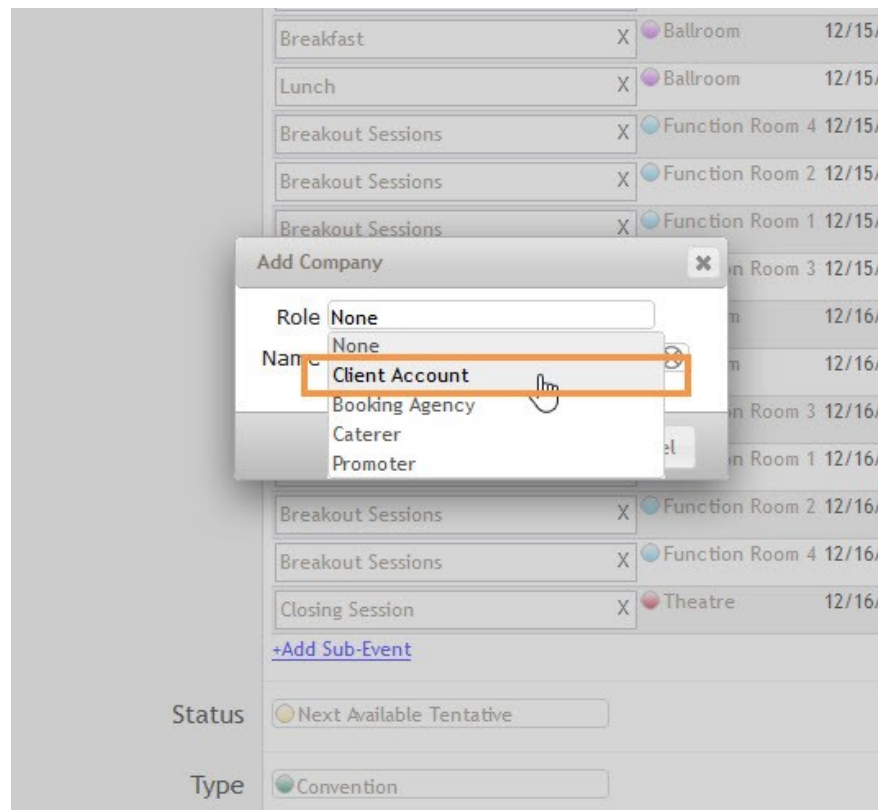
15. If the company doesn't appear in your search, you can click *+create new* to add a new contact to your address book. Fill out your new contact's information and click *Add*.

The screenshot shows a software interface with a modal dialog box titled "Add Company". The dialog box contains the following fields and options:

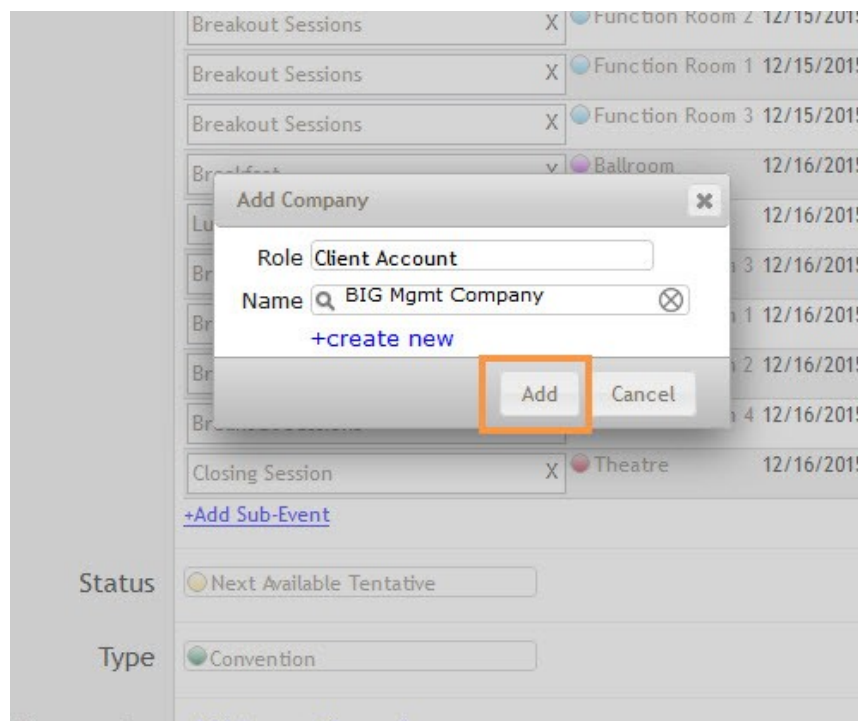
- Role:
- Name:
- Parent:
- Title:
- Phone:
- Phone2:
- Email:
- Email2:
- Address:
- Address2:
- Address3:
- Address4:
- City: St: Postal Code:
- Country:
- Website:
- Note: ☐ Private?
- Group: ☐ Associations ☐ City Contacts ☐ Not for Profit ☐ Christmas Card

At the bottom of the dialog box, there are two buttons: "Add" and "Cancel". An orange arrow points from the "Add" button to the form area. The background of the application shows a "Where / When" tab with "Breakfast" selected, and a "Ballroom" tab.

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.

	Breakout Sessions	X	Function Room 2	12/16
	Breakout Sessions	X	Function Room 4	12/16
	Closing Session	X	Theatre	12/16
	+Add Sub-Event			
Status	<div>Next Available Tentative</div>			
Type	<div>Convention</div>			
Account/Companies	<div>BIG Mgmt Company (Client Account) X</div> +Add Account/Companies			
Contacts	+Add Contacts			
Notes	<div></div>			
Avails Display	<div>Use default setting</div> Avails Display Legend			

Done

19. Add notes as you wish. These notes will appear on the event details page and can be pulled into reports as needed.

	Breakout Sessions	X	Function Room 2 12/16/201
	Breakout Sessions	X	Function Room 4 12/16/201
	Closing Session	X	Theatre 12/16/201
	+Add Sub-Event		
Status	<div>Next Available Tentative</div>		
Type	<div>Convention</div>		
Account/Companies	<div>BIG Mgmt Company (Client Account) X</div> +Add Account/Companies		
Contacts	+Add Contacts		
Notes	<div>You can add your notes here.</div>		
Avails Display	<div>Use default setting</div> Avails Display Legend		

Done

20. 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.

Status	Breakout Sessions	X	Function Room 4 12/16/2015 1:
	Closing Session	X	Theatre 12/16/2015 5:
	+Add Sub-Event		
Type	Next Available Tentative		
Account/Companies	BIG Mgmt Company (Client Account) X +Add Account/Companies		
Contacts	+Add Contacts		
Notes	You can add your notes here.		
Avails Display	Use default setting Use default setting Show the event type (along with color) Show the event name (along with color) Show only the color (no text) Show nothing (no color, no text)		
Done			

21. When all your event information is as you wish, click *Done* to add your event.

	Lunch	X	Ballroom	12/16/2015
	Breakout Sessions	X	Function Room 3	12/16/2015
	Breakout Sessions	X	Function Room 1	12/16/2015
	Breakout Sessions	X	Function Room 2	12/16/2015
	Breakout Sessions	X	Function Room 4	12/16/2015
	Closing Session	X	Theatre	12/16/2015
	+Add Sub-Event			
Status	Next Available Tentative			
Type	Convention			
Account/Companies	BIG Mgmt Company (Client Account) X +Add Account/Companies			
Contacts	+Add Contacts			
Notes	<div>You can add your notes here.</div>			
Avails Display	Use default setting Avails Display Legend			

Done

22. Your event and functions have been booked.

My Conference : Event (id=8490)

Actions

Event Search

Event Name

My Conference

Spaces Used

Ballroom

,

Function Room 3

,

Function Room 1 (3 more)

When

Move

View Calendar

12/14/2015 8:00 AM (Mon) - 12/16/2015 6:30 PM (Wed)

Status

Granted Hold 1

Type

Convention

Avails Display

Show only the color (no text)

Grouping

Could not locate parent

Event Time

Not Set

Company

+Add

BIG Mgmt Company (client Account)

Contacts

+Add

None

Performance Manager

Not Set

Production Coordinator

Not Set

Notes

You can add your notes here.

Expected Revenue

Functions

Spaces Used

Functions/Spaces

Timeline

Activities/Journals

Notes

Documents

Resources

History

Social Tables

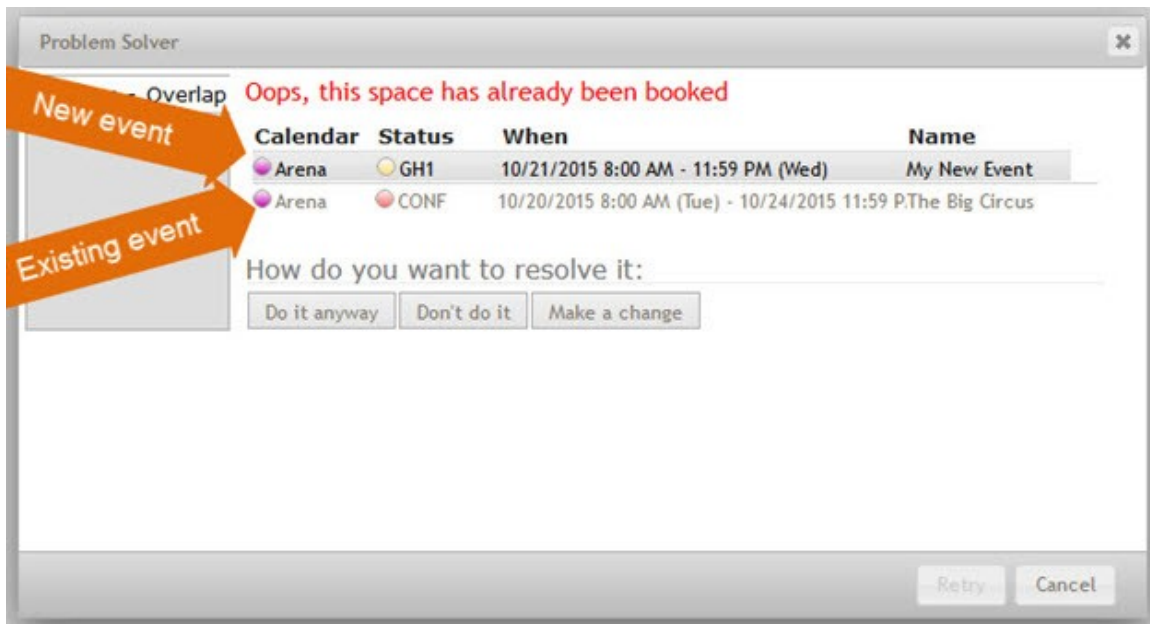
Pl 3 More>>

Mass Edit

Mass Edit When

Name	Where	When	Status	Type	Room Setup Type
Breakfast	Ballroom	12/14/2015 8:00 AM - 9:00 AM (Mon)	Granted Hold 1	Convention	
Opening Session	Ballroom	12/14/2015 9:30 AM - 11:30 AM (Mon)	Granted Hold 1	Convention	
Lunch	Ballroom	12/14/2015 12:00 PM - 1:00 PM (Mon)	Granted Hold 1	Convention	
Breakout Sessions	Function Room 2	12/14/2015 1:30 PM - 4:30 PM (Mon)	Granted Hold 1	Convention	
Breakout Sessions	Function Room 4	12/14/2015 1:30 PM - 4:30 PM (Mon)	Granted Hold 1	Convention	
Breakout Sessions	Function Room 3	12/14/2015 1:30 PM - 4:30 PM (Mon)	Granted Hold 1	Convention	
Breakout Sessions	Function Room 1	12/14/2015 1:30 PM - 4:30 PM (Mon)	Granted Hold 1	Convention	
Breakfast	Ballroom	12/15/2015 8:00 AM - 9:00 AM (Tue)	Granted Hold 1	Convention	
Lunch	Ballroom	12/15/2015 12:00 PM - 1:00 PM (Tue)	Granted Hold 1	Convention	
Breakout Sessions	Function Room 1	12/15/2015 1:30 PM - 4:30 PM (Tue)	Granted Hold 1	Convention	
Breakout Sessions	Function Room 3	12/15/2015 1:30 PM - 4:30 PM (Tue)	Granted Hold 1	Convention	
Breakout Sessions	Function Room 4	12/15/2015 1:30 PM - 4:30 PM (Tue)	Granted Hold 1	Convention	
Breakout Sessions	Function Room 2	12/15/2015 1:30 PM - 4:30 PM (Tue)	Granted Hold 1	Convention	
Breakfast	Ballroom	12/16/2015 8:00 AM - 9:00 AM (Wed)	Granted Hold 1	Convention	
Lunch	Ballroom	12/16/2015 12:00 PM - 1:00 PM (Wed)	Granted Hold 1	Convention	
Breakout Sessions	Function Room 2	12/16/2015 1:30 PM - 4:30 PM (Wed)	Granted Hold 1	Convention	
Breakout Sessions	Function Room 4	12/16/2015 1:30 PM - 4:30 PM (Wed)	Granted Hold 1	Convention	
Breakout Sessions	Function Room 3	12/16/2015 1:30 PM - 4:30 PM (Wed)	Granted Hold 1	Convention	
Breakout Sessions	Function Room 1	12/16/2015 1:30 PM - 4:30 PM (Wed)	Granted Hold 1	Convention	
Closing Session	Theatre	12/16/2015 5:00 PM - 6:30 PM (Wed)	Granted Hold 1	Convention	

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.

