

Creating an Alert

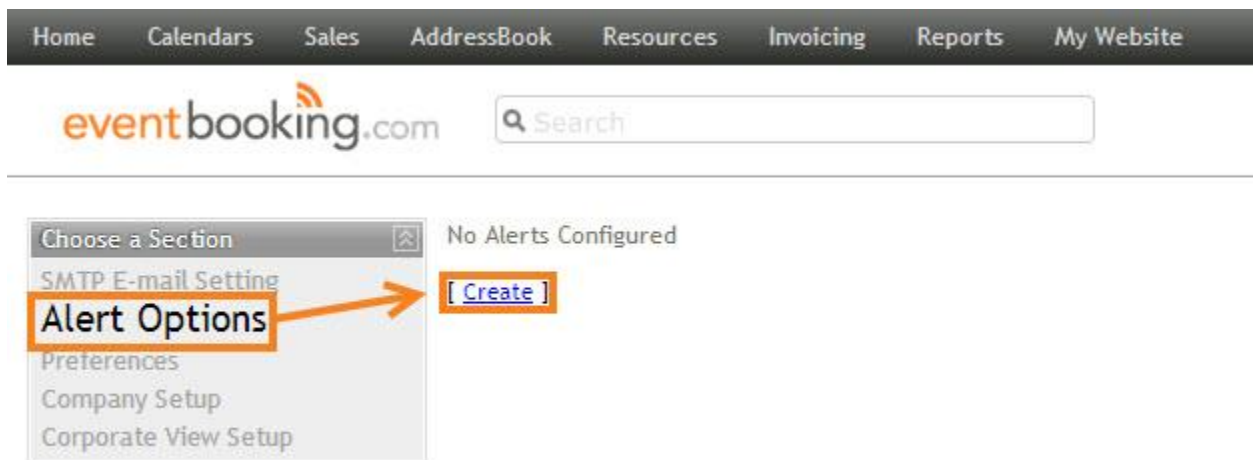
Updated: August 21, 2014

Individual users can set up email alerts in order to stay current with the information being added, edited and deleted within EventBooking. This document will walk you through how to set up an alert.

1. Hover over your name in the upper-right corner of the browser window.
2. Click **My Settings**.



3. Click **Alert Options** on the left side of the browser window.
4. Click **Create**.



5. Enter the name of your alert.
6. History presets filter the information for which you will receive alerts. You can either:
 - Select an existing history preset from the drop-down. If you use an existing history preset, please [skip to step 18](#).
 - Create a new history preset by clicking **Manage**. If you use this option, please continue with the following steps.

Add / Edit Alert [X]

Name of alert:

History Preset: None [Manage]

Where to send:

Main (support@eventbooking.com)*
* = primary email address

How often to send:

Immediately
 Specified time

Save Cancel

7. Click **Add Preset**.

History Preset Manager

Summary [Expand] [Add Preset]

[Select] Added Events [Copy]

Events	Operations	Event is Added
		Event is Added

8. Click the plus sign next to *Viewable by* to expand the list of permissions profiles.
9. Click the checkboxes for each profile that should be able to view your history preset.

History Preset Manager

Add / Edit Preset

Preset Name:

Viewable by

- All
- Sales
- View GCB
- View GCB Avails
- Eva N. Tchoordinator (profile)
- System Admins ALL
- NG Near (profile)
- Jane Doe (profile)
- Kate Ring (profile)
- Sharon Green (profile)
- John Doe (profile)

Events

Activities

10. Click the plus sign next to *Events, Activities* and/or *Journals*.
11. Click the plus sign next to *Operations*.
12. You will see checkboxes for an item being added, deleted and changed. Checking the box for changed allows you to select if the alert should trigger for any changes or specific changes that you select. Check all of the operations boxes that apply.

We recommend against alerting on too many operations at once on high traffic accounts as this can cause speed issues.

History Preset Manager

Add / Edit Preset

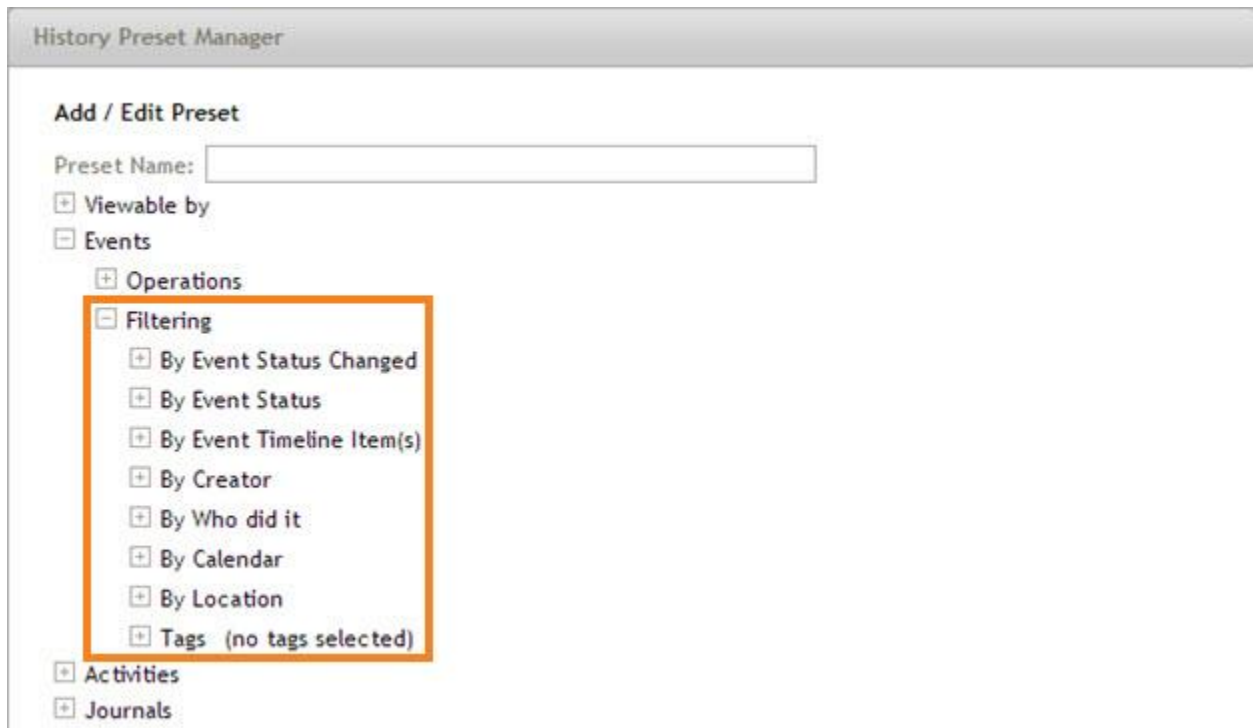
Preset Name:

Viewable by

- Events
 - Operations
 - Events added
 - Events deleted
 - Events changed
 - Any change
 - Specific changes
 - Event name
 - Calendar
 - Date/Time
 - Status
 - Note
 - Document
 - Event Timeline

Filtering

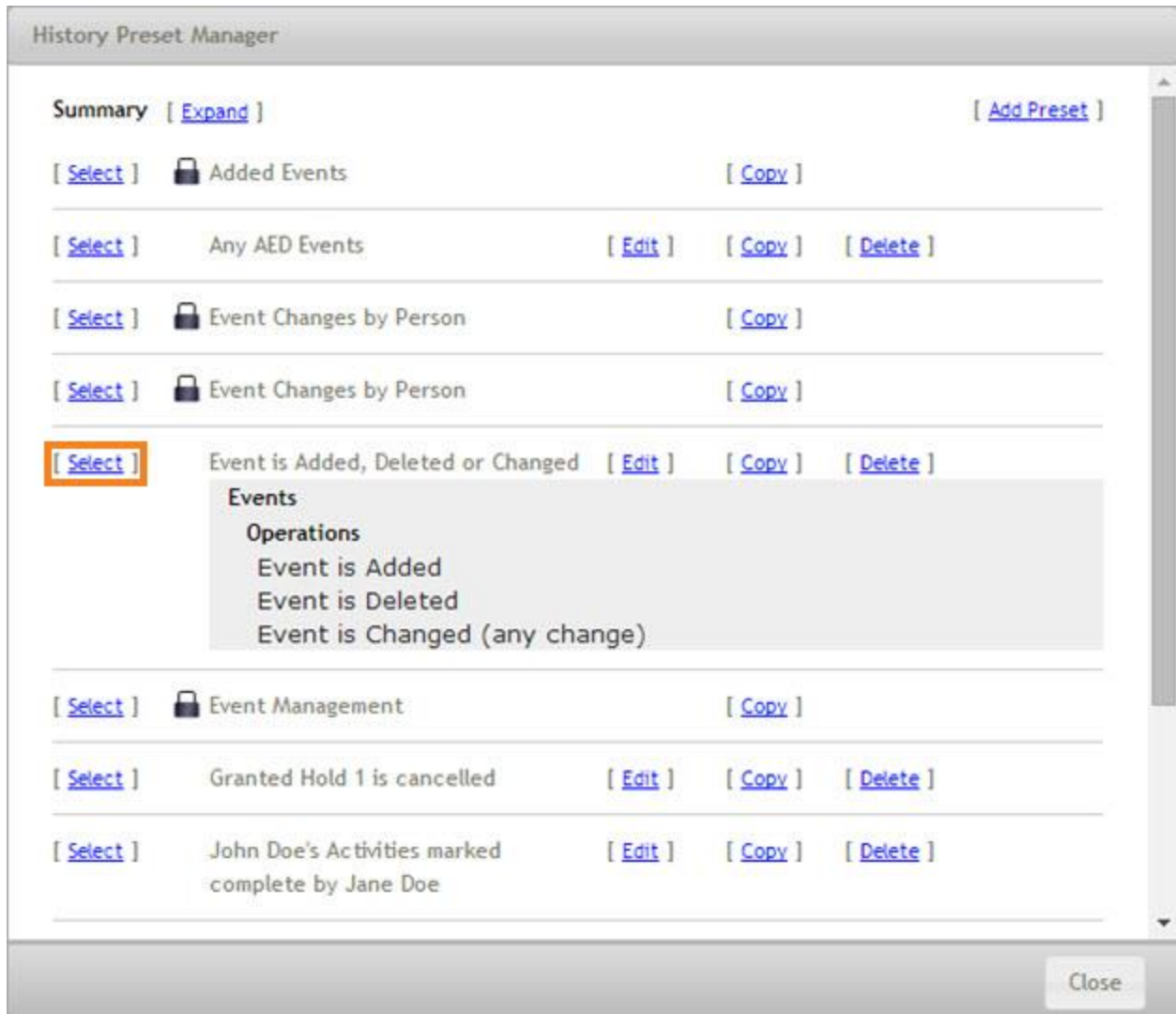
13. Click the plus sign next to *Filtering*.
14. You will be presented with more options to expand. There are some differences between events, activities and journals, but the most commonly used options are:
 - *By Creator*: trigger an alert based on who created the affected event, activity or journal
 - *By Who did it*: trigger an alert based on who affected the event, activity or journal



15. Enter a name for your history preset.
16. Click **Save**.



17. Click **Select** next to the history preset you have just created.



The screenshot shows the 'History Preset Manager' window. At the top, there is a 'Summary' section with an '[Expand]' link and an '[Add Preset]' link. Below this is a list of history presets, each with a '[Select]' link, a lock icon, a description, and action links for '[Edit]', '[Copy]', and '[Delete]'. The preset 'Event is Added, Deleted or Changed' is selected, and a dropdown menu is open showing its details:

- Events**
- Operations**
 - Event is Added
 - Event is Deleted
 - Event is Changed (any change)

At the bottom right of the window is a 'Close' button.

18. Select the email address(es) to which you would like to have the alerts delivered. You can only select email addresses listed for your personal user account.

19. Select whether you would like the alerts to be sent:

- Immediately. This option will send an individual email alert every time the history preset is triggered.

We recommend not using this option, as large venues with many events can experience significant speed issues if alerts are triggering too often.

- At a specific time. This option will send an email alert digest at the specified times.

Add / Edit Alert [X]

Name of alert:

History Preset:
 [[Manage](#)]

Where to send:
 Main (support@eventbooking.com)*
* = primary email address

How often to send:
 Immediately
 Specified time

Save Cancel

20. Clicking the date next to *Start* will bring up a date picker that will allow you to select the date on which your alerts should start.
21. Enter the time of day that the alerts should be sent.
22. Select whether the alerts should repeat hourly, daily, weekly or monthly from the drop-down.
23. Select how often the alerts should repeat from the drop-down. Leaving this at 1 will cause the alerts to repeat every hour, day, week or month; setting it to 2 will cause the alerts to repeat every other hour, day, week or month; etc.
24. You can also set an end date for your alerts by checking the box next to *Ends*. By default, alerts will be set to never end.
25. Once the settings for your recurring alert digest are selected, click **OK**.

Add / Edit Alert [X]

Where to send:

Main (support@eventbooking.com)*
* = primary email address

How often to send:

Immediately

Specified time

Start: 5/22/2014 12:00 A

Repeats: Daily

5/22/2014 12:00 AM, Repeats every Day

Repeat every: 1 Days

Ends: Never

OK Cancel

Save Cancel

26. Click **Save**.

Add / Edit Alert ✕

Name of alert:

History Preset:
 [\[Manage \]](#)

Where to send:
 Main (support@eventbooking.com)*
* = primary email address

How often to send:
 Immediately
 Specified time

Your alert has been created.

Choose a Section ⊞

- SMTP E-mail Setting
- Alert Options**
- Preferences
- Company Setup
- Corporate View Setup

AED Event [\[Edit \]](#) [\[Delete \]](#)

When: (immediate)

History Preset: Event is Added, Deleted or Changed

Events

Operations

- Event is Added
- Event is Deleted
- Event is Changed (any change)

[\[Create \]](#)