

Creating a Flex Event

Flex Instructions

You may be apprehensive about creating your first Flex event, but relax. The Event Wizard walks you through building the framework in three short steps. You can change anything you create with the wizard later so don't worry if you're not sure about a date, or a color, or a contact type. This is just the start.

NOTE: These instructions are for Flex events. If you're creating a Classic event, [reference this article instead](#).

1 Launch the Event Wizard. Click **Create Event**.



2 Specify key event details. Hover over Flex Registration and click **Select**. Complete the required fields. The title tops almost every page on the website and throughout the registration process. Select a category. The description, location and locale, and date display by default on your event's summary page.

Set the time zone to match the venue's. Select the dates and times in the When section. The Registration Deadline is the last day invitees will be able to register.

NOTE: Your event will close automatically when it reaches capacity or the Registration Deadline passes.

In the Event Planner section, enter the planner's first and last name. This will appear by default in the From Name field of event emails by way of data tags.

The screenshot shows the 'Event Planner' interface with a 'Basic Information' modal open. The modal is for an 'Invitation Reminder' and contains the following fields:

- Type:** Invitation Reminder
- * Name:** Invitation Reminder
- Subject:** Reminder - Invitation to the {{E-TITLE}}
- * From Name:** {{P-FIRST NAME}} {{P-LAST NAME}}
- From Email Address:** jgoode@cvent.com
- Active:** Yes (radio button), No (radio button)

An arrow points from the 'First Name' field in the background 'Event Planner' form to the 'From Name' field in the modal.

Click **Next**.

3 Enable features in your event. To turn on features related to event details, check the boxes to the left. Don't overlook the sub-settings in the ones that require more information.

The screenshot shows the 'Pricing' section with the following feature toggles:

- Fees:** ☒ Fees (Selected, highlighted with a green bar)
- Discounts:** ☐ Discounts
- Taxes:** ☐ Taxes
- Service Fees:** ☐ Service Fees
- Invoicing:** ☐ Invoicing

The 'Fees' section is expanded, showing the following sub-settings:

- Select a merchant account:** merchant 1
- Select a currency:** U.S. Dollar
- Allowed Payment Methods:**
 - ☒ Visa
 - ☒ Mastercard
 - ☒ American Express
 - ☒ Discover

Not sure what the feature is? Hover over the **i** to the right of its name.

NOTE: If you hover over the feature, and the feature is locked, it is not currently available for Flex. Use a [Classic event](#) instead.

Go through each section. Once you're done, click **Next**.

Do the same for Website and Registration, then Promotion & Communication.

Click **Previous** to make any changes. If everything looks right, click **Finish**.

4 Edit your event later. Your newly created event will automatically open on your screen.

To edit the basic event details, hover over Event Details and, under General, select **Event Information**. Click **Edit** to make changes, then **Save**.

Add registration types to your event.

Tailor your registration process to provide all of the information you need, while also making it as painless as possible for your invitees. Sessions can be added and fees associated to anything that has a cost. However, if you enable fees after the initial creation, *you will need to add the Payment widget before you can create any fees*. Modify the [contact information you want to collect](#), and create registration questions. Lastly, you can [determine the different types of payment](#) for your invitees.

Brand your website to your event's or company's specs with a [customized website and registration](#). Then personalize your emails.