Setting Up Event Espresso

Once you've got Event Espresso installed you've got to spend a bit of time setting it up It's super-easy to do and once you're done your WordPress website will be a powerful event management system. In this setup guide we'll cover the following:

1. Getting Started

A red warning box will tell you that to get started with event Espresso you need to set up your organization settings. **Click** on the organization settings link:

> Event Espresso must be configured. Go to the Organization Settings page to configure the plugin "Page Settings."

This is the main settings page for your organization. From here you can do the following:

- **Organization Settings** – including contact details, time & date, and logo
- **Page Settings** – decide where your registration, auto-return, payment notification and cancel return pages are
- **Email Settings** – Create default emails to be sent to registrants
- **Optional/ Advanced Settings** – reCaptcha, payment settings, administration options and extras such as the dashboard widget and promotions

2. Organization Settings

Start by adding your organization settings. These settings tell Event Espresso who you are and will be used again and again throughout the event creation process. It's important that you get them right!

- **Contact information** – all of your basic contact information. Your organization's name will appear on all of your correspondence. Make sure you add your organization's country as this is needed for the currency settings.
- **Time & Date** – choose the correct time zone to ensure that your event registrations open and close at the correct time.
- **Email** – this is the email that all notifications will go to.
- **Images** – add your logo to brand your invoicing, ticketing, certificates and payment templates.

📋💲 General Settings

Organization Settings ▼

Contact Information [?]

Organization Name: *Your company*

Organization Street 1:

Organization Street 2:

Organization City:

Organization State:

Organization Zip/Postal Code:

Organization Country: No country selected ▼ ()

important for currency settings

Primary contact email: *Your email*

Time and Date Settings

Current Time: November 25, 2011 11:08 am

Get this right to make sure events open and close on time

Change timezone and date format settings?

Note: *You must set the time zone for your city, or the city closest to you. UTC time will not work. View an example?*

Events expire on registration end date?   Yes ▼

Add your logo

Images

Add a Default Logo [?]   Upload Image

Save Options

3. Page Settings

There are a number of pages that you need to have for Event Espresso to function correctly. Most of these should be excluded from your website navigation. If you are using a WordPress 3.0+ theme with navigation support then you can do this by omitting the pages from the menu you create at Appearance > Menu. If your theme does not have nav menu support you can use the Exclude Pages from Navigation plugin.

Include or not include in nav menu (user choice)

- Main registration page

Exclude from nav menus

- **Auto-return URL** – where your registrant is sent to when they have completed the signup process. It is used as both a "thank you" page and as a landing page for payments.
- **Payment notification URL** – where your payment transactions are carried out.
- **Cancel return URL** – where your registrant is sent should they cancel their registration.

When you install Event Espresso you'll see that these pages are automatically created:
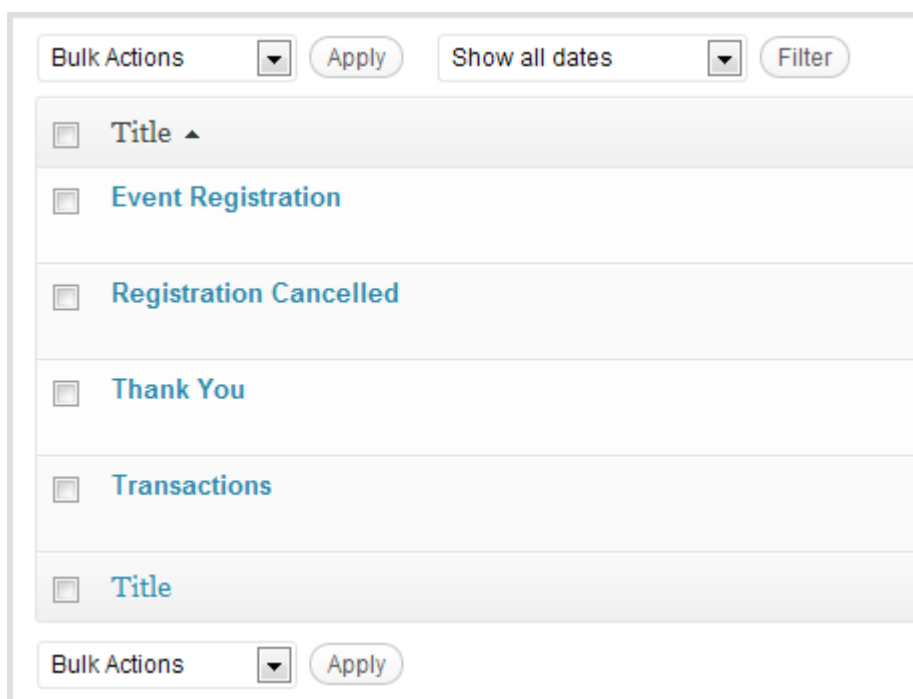
The page settings let you adjust these pages. If you change one of the default pages then y**ou must insert the corresponding shortcode into the page.**

So, for example, if you change the Main Registration page, you must insert the [ESPRESSO_EVENTS] shortcode.

There are lots of additional shortcodes that you can insert to display Event Espresso data. For example,

- [EVENT_LIST] displays a list of all **events**
- [LISTATTENDEES] displays a list of all **attendees**
- [ESPRESSO_STAFF] displays a list of all **staff members**

You can find all of the available Event Espresso shortcodes under **Event Espresso > Help/Support**.

There are more settings that you tweak on this page to get Event Espresso working exactly how you want to. But the above are the most essential ones for getting you up and running. Once you're happy save the options and move on to **Settings > Payments**.

4. Payment Settings

If you are running an event and want to make money out of it then your next step ought to be your payment settings. This is where you decide how people will pay you. Event Espresso has a lot of different payment gateways. To get started with one click on the yellow activation box to activate it.

Once you have clicked the activation box you will be given some fields that you will need to complete in order to process transactions by this method.

Check/Money Order Payment Settings

Deactivate Check/Money Order Payments?

Title:

Check/Money Order Payments

Payment Instructions:

Please send Check/Money Order to the address below. Payment must be received within 48 hours of event date.

Payable To:

Your organization

Address to Send Payment:

99 A Street
Lovely Town

United States

Update Check/Money Order Payr

Let's take a quick look at each of the payment methods:

a) Check/Money Order

Use this to let registrants pay you by cheque or money order. You will need to tell your registrants what name they should put the cheque, and where to send it to.

b) Electronic Funds Transfer

Registrants can transfer money straight into your bank account. You'll need to provide them with your account number and bank details.

c) Invoice Payment Settings

Some people will prefer to pay you via invoice. These will be created as a PDF which the registrant can then print out for their own records. The default information will be taken from your organization settings. There is also an option for adjusting the template and adding a different logo.

d) Authorize.net SIM Settings

Authorize.net is a popular online payment system. The Server Integration Method (SIM) lets you integrate Authorize.net with your website, which then directs registrants to a payment form on Authorize.net. Authorize.net will provide you with a login ID and transaction key. You need to add these to the Event Espresso settings where you can also change the payment button and add your own logo .

e) Authorize.net AIM Settings

The Advanced Integration Method (AIM) from Authorize.net lets you seamlessly integrate the payment system without sending your registrants away from your site. The advantage of this is that

your registrants are not being sent off-site, however it is more difficult to set up. To begin to set up AIM you'll need your Login ID and Transaction Key from Authorize.net.

f) First Data

First Data is a merchant service that lets you process credit and debit card payments through your website. To set it up you will need your First Data store number. You will also have a .pem file that needs to be in the /wp-content/uploads/espresso/gateways/firstdata folder. The file should have the same name as your store number.

g) First Data Connect 2

First Data Connect 2.0 is the third generation API from First Data.

h) iDeal by Mollie

iDeal is a Dutch payment system that offers low-cost payment solutions for people in the Netherlands. You will need a partner ID which is provided by Mollie to set this payment gateway up.

i) PayPal Standard Payments

PayPal standard is the basic method for paying via PayPal. You add your PayPal ID and registrants can are directed to a site on PayPal from which they can make payments.

j) PayPal Pro

PayPal Pro lets you process payments straight from your website. This means that the integration between PayPal and your homepage is seamless. You can get paid for your events from your website. PayPal Pro is more complicated to set up than PayPal and requires that you get an API key from PayPal. You can read information on how to do this here.

k) eWay

eWay is a global payment processing system. To integrate eWay with Event Espresso you will need to input your eway ID, username and country information. You can also customize it by changing the payment button and adding your logo to the payment page.

l) Merchant Warrior

Merchant Warrior is an Australia-based online payment system, though it offers payment solutions to people worldwide. To set up Merchant Warrior you will need your UUID, and will need to set up your payment API.

m) 2Checkout

2Checkout is a popular alternative to PayPal that comes with a number of add-ons to work with third parties. To get started with 2Checkout you will need your ID and Username. You can also customize it further by changing the button image and adding your own logo.

n) Paytrace

To set up Paytrace with Event Espresso you will need your Paytrace user ID and password.

o) Quickpay

To get started with Quickpay you need to add your ID and md5. Quickpay also comes with language customization so you can choose a different language for the payment window.

p) WorldPay

WorldPay is a UK-based online payment system. To get WorldPay set up with Event Espresso you need your WorldPay installation ID.

q) Custom Gateways

Developers can add custom gateways to Event Espresso, or you can get someone here at Event Espresso to take care of it for you. Details of our custom gateway service can be found here.

Now that you are set up to take payments for events there are a few more steps you can take to get yourself started.

5. Add a Venue

You can add as many venues as you want to Event Espresso. This means that you can re-use them again and again for different events. Adding a venue is easy. Navigate to **Event Espresso > Venues.**

Click "Add New Venue".
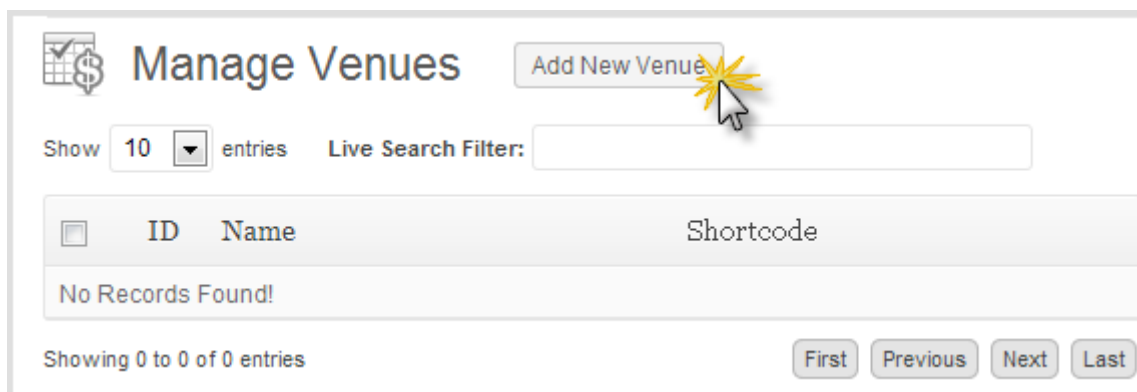
Add your venue's name and information. There is also room to add contact information for a contact based at the venue.

You can also add Google Maps to help your registrants find your venue:

Once you're happy with your information click "Save". Your venue will now be available for you to use when you create an event.

6. Create Custom Emails

You can create custom emails which you can use for different communications relating to your event. For example, you could create:

- Thank you for signing up email
- Reminder emails
- Payment emails
- Thanks for attending emails

The great thing about creating emails from the WordPress dashboard is that you can insert tags to tell Event Espresso to insert registrant and event information, such as names or event names, into the emails.

To create an email navigate to **Event Espresso > Emails** and click "Add New Email".

Add the email name and subject line:

To find tags that you can insert into your email simply scroll down to underneath the text editing field:
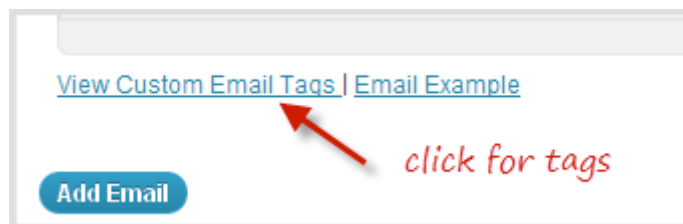
Write your email, adding the relevant fields:

When you're done click "Add Email". Your email will now be ready for you to use when creating your events.

7. Creating Forms

When you create your events there may be specific information that you need to capture. Event Espresso lets you capture information with **Questions and Question Groups.**

- **Questions** – a question, such as "How much do you weigh?"

- **Question Groups** – groups of questions that are related, for example "Diet Class Questions"

You create Questions at **Event Espresso > Questions** and Question Groups at **Event Espresso > Question Groups**.

By default Event Espresso has a number of Questions already set up, and two default Question Groups.

The preset Questions are basic ones such as name, email, address and phone.

The preset Question Groups are "Personal Information" and "Address Information".

The "Personal Information" Question Group contacts the "First Name", "Last Name" and "Email" questions. It is attached to every event you create. **You cannot remove it** as the information is required for the plugin to function correctly.

Let's take a look at how to do this:

a) Add a Question

To add a question navigate to **Event Espresso > Questions**. Click "**Add New Question**".

Add the question and choose the type of field you need. If you wish you can make the field required – this means that the registrant will be unable to submit the form without completing the field. This is helpful if there is information that you have to capture.

When you have created your question click "Add Question."

b) Create a Question Group

When you have created a set of questions you can **group them together**. Navigate to **Event Espresso > Question Groups**. Here you can see the preset question groups. To create a Question Group click "Add New Group." Give your group and name and then select which questions you would like to add:

When you're happy with your settings click "Add Group."

Your Question Group is now available to attach to your events.

8. Create Your Event

You're now ready to create your event. You can do this by going to **Event Espresso > Events** and clicking "Add New Event".

There are lots of different settings you can adjust here to get the registration for your event just right.

Name & Description

Give your event a title and description. These will be visible on your website.

Event Options

There are a number of settings you can adjust here:

- Attendee Limit
- Allow or disallow group registrations
- Require information for additional attendees
- Set the event to active or inactive
- Edit the status of the event to Public, Waitlist, Ongoing, Draft, Deleted

- Display the event description or event registration form
- Set the default payment status
- Set an alternate registration page or email address

Event Date/Times

Here's where you set the all-important times and dates for your event. If you have added the correct time and date settings under your organization settings then your event registration should open and close at the correct time. You can set the following:

- Registration dates and times
- Event dates and times

Event Pricing

Choose your event pricing. You can add as many different prices as you want.

Event Category

Assign events to different categories.

Event Promotions

You can add special promotions such as easy registration discounts.

Event Questions for Primary Attendees

By default the personal information question group will be attached to your event. You'll also see the group we created in the previous step.

You can also create Question Groups for additional attendees.

Venue Information

If you have created a venue this will appear in the dropdown menu:

Email Confirmation

You can attach your custom emails to your event, or use a default email.

Create a Post

If you use a blog on your website you can create a blog post right on the event creation screen. Just create your post and it will be sent to your blog.

You're now all set up and ready to go with Event Espresso!