

# Set Up and Manage Event Packages

An event package is a series of interconnected events. A main event can have several smaller events, and each smaller event can have its own charges and requirements. A wedding is an example of an event package. The actual wedding ceremony is one event, but it's usually preceded and followed by many other events, such as an interview, counseling sessions, rehearsal, and reception.

## Before You Add an Event Package

You must set up elements for the package before adding it. Do the following:

- Review the Requirement Types [keywords category](#) to ensure it includes all the requirement types necessary for the event package. You can add requirement types directly to the keyword list, when you schedule the events, or in the Package Events window.
- Review the [Charge/Payment Descriptions list](#) to ensure it includes all charge and payment descriptions necessary for the event package. You can add descriptions directly to the list, when you schedule the events, or in the Package Events window.
- Set up the [templates for packages](#). A template is an easy way to set up an event package. A good template contains every event, charge, and requirement necessary for the event package.
- Set up the [organization](#) and [contact names](#). You can set up a generic organization, such as "Wedding", to use for similar event packages.

## Adding an Event Package

1. On the Information tab, click **Event Packages**.
2. At the top, click **Add Pkg**.
3. Enter the package name. For example, "Bailey/Johnson Wedding".
4. Select the organization scheduling the event package.
5. In the Package Remarks memo box, enter remarks about the event package, if necessary.
6. Click **Next**.
7. In the list on the left, select items to include in the package. You can select individual items or entire templates. Click the right and left arrows to move items from one list to the other, or double-click the item to move it.
8. After you move all items you want in the event package to the list on the right, click **Next**.
9. For each event, enter or select the date, facility, and starting and ending times. If conflicts occur, the details display.
10. To schedule each item, select **Mark to Schedule**. The [Simple Event Scheduling wizard](#) displays.
11. As you schedule each event, it displays in the Scheduled Events grid. To modify event information, select the event in the grid, and click **Load Event**.



You can also double-click an item in the grid to modify the event.

12. You can click **Finish** at any time.

#### Useful Information



If you click **Finish** before you schedule all events, the **Schedule Now** button displays next to the event in the Package Events window. When you're ready to continue scheduling, in the navigation pane, click **Complete Schedule**.

## Adding Items to an Event Package

In the Event Packages window, you can add items from a template, event names, requirements, and charges/payments to an existing event package.

1. On the Information tab, click **Event Packages**.
2. Locate the package record you want to add items to.
3. In the list, select the line above where you want to add an item, and click **Add Item**.
4. Select **Use Template**, and click **Add/OK**.
5. In the list on the left, select items to include in the package. You can select individual items or entire templates. Click the right and left arrows to move items from one list to the other, or double-click the item to move it.
6. After you move all items you want to include in the event package to the list on the right, click **Apply/OK**.
7. To save the template you created, click **Save as Template**.

1. On the Information tab, click **Event Packages**.
2. Locate the package record you want to add items to.
3. In the list, select the line above where you want to add the item, and click **Add Item**.
4. Select the item to add, and click **Add/OK**.
5. Enter or select any information about the item.

#### Useful Information



- If you add an event name, be sure to include the package name. For example, "Scheduling Meeting - Bailey /Johnson Wedding".
  - If you add a requirement, the drop-down list uses items from the Requirement Types keyword list.
  - If you add a charge/payment, the drop-down list uses items from the Charges/Payments Descriptions list.
6. Click **Save**.

### Related Topics

- [View an Event Package's Total Charges, Payments, and Balance](#)
- [Delete Event Packages](#)

[Add Contacts for an Organization, Event Package, or Facility](#)