

Simplify Repeat Events with Offsite Venues

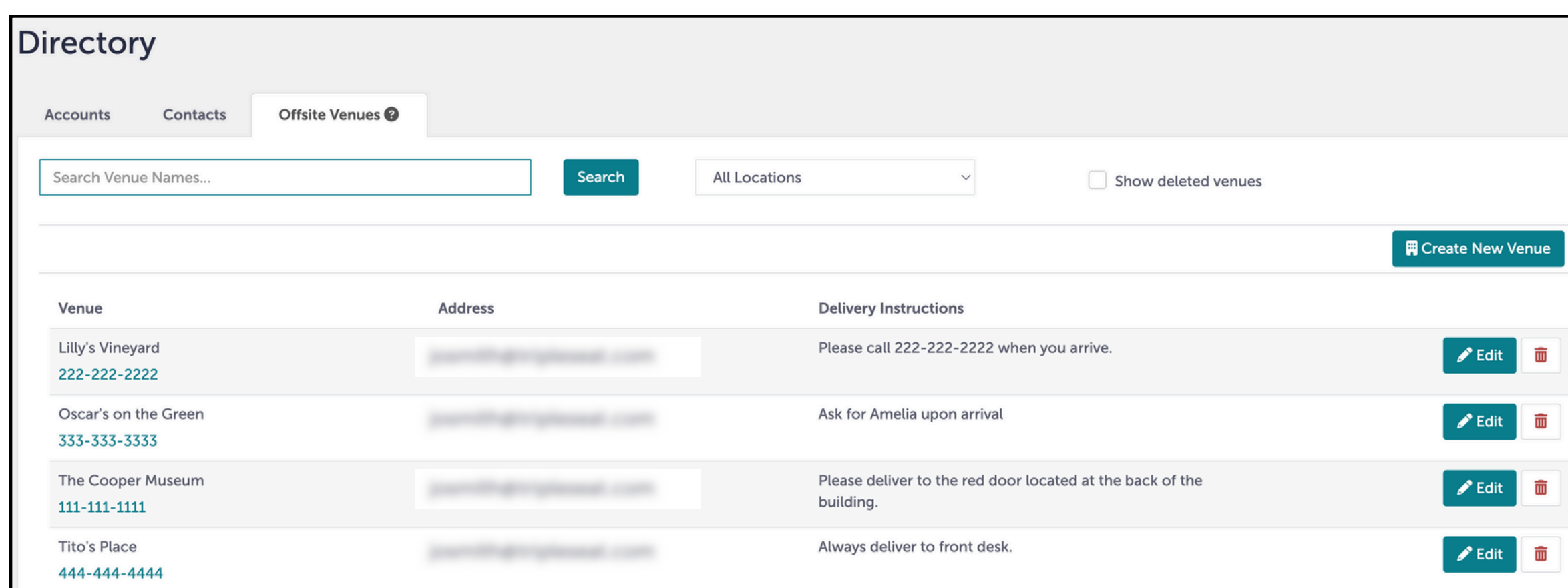


With offsite venues, you can save frequently used venues in settings and select them from a dropdown when creating events using drop-off or full-service catering. This feature allows you to store and access repeat venue addresses and delivery instructions, eliminating redundant data entry and streamlining the event creation process.


Notes: Event styles need to be enabled in order to set up and use offsite venues, as this option only populates for drop-off or full-service catering. If you do not have event styles enabled, check out this crash course.

Appropriate settings access is needed to set up and manage offsite venues. This access is managed in User Roles > Directory (Offsite Venues) under the Settings section.

- This will determine whether the Directory link is visible or hidden on the Settings page, giving you full control over the visibility of this feature.



1. Create an Offsite Venue.

- Navigate to Settings > Directory > Offsite Venues.
- Click 
- Fill out fields and select which locations will use this venue.
 - Venue Name and Location Selections are the only required fields.
- Click Create.
- Repeat as needed to create multiple offsite venues.

Note: You will only see the locations you have access to. However, venues can be shared among locations that you do not have access to.

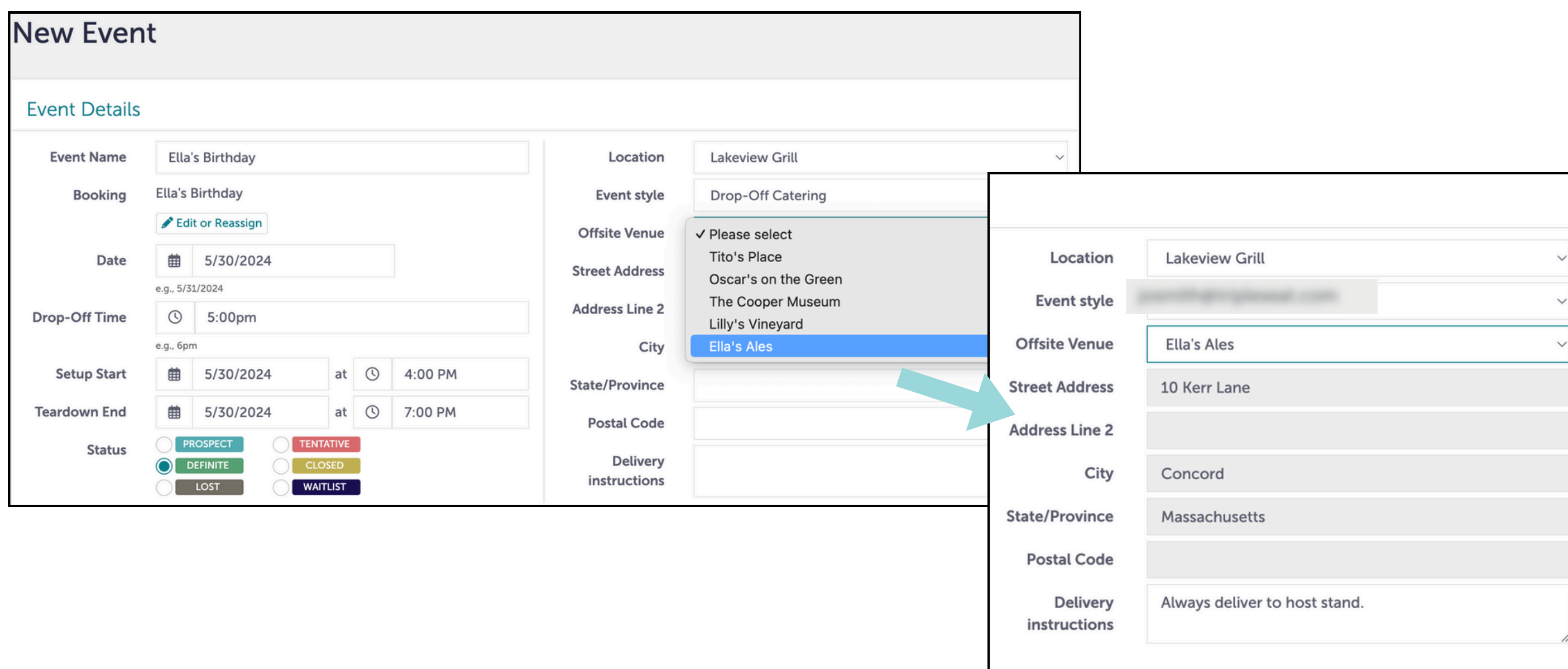
Best Practice: Fill out the address and any applicable delivery instructions to save time in the future.

2. Use Offsite Venues with Events.

When creating an event and selecting full-service or drop-off catering, the Offsite Venues dropdown will appear. You always have the option to select a venue from the dropdown or manually enter a venue address and delivery instructions.

Adding to New Events

- Click the dropdown to select the Offsite Venue.
 - The dropdown will display venues from the Directory for the selected location. Once selected, the venue's address and delivery information will automatically populate.
 - The address is locked and cannot be edited.
 - The delivery instructions are editable.
- Click save. The offsite venue name and address details will be visible on the event details page.



New Event

Event Details

Event Name: Ella's Birthday

Booking: Ella's Birthday

Date: 5/30/2024

Drop-Off Time: 5:00pm

Setup Start: 5/30/2024 at 4:00 PM

Teardown End: 5/30/2024 at 7:00 PM

Status: PROSPECT TENTATIVE DEFINITE CLOSED LOST WAITLIST

Location: Lakeview Grill

Event style: Drop-Off Catering

Offsite Venue: **Ella's Ales**

Street Address: 10 Kerr Lane

Address Line 2:

City: Concord

State/Province: Massachusetts

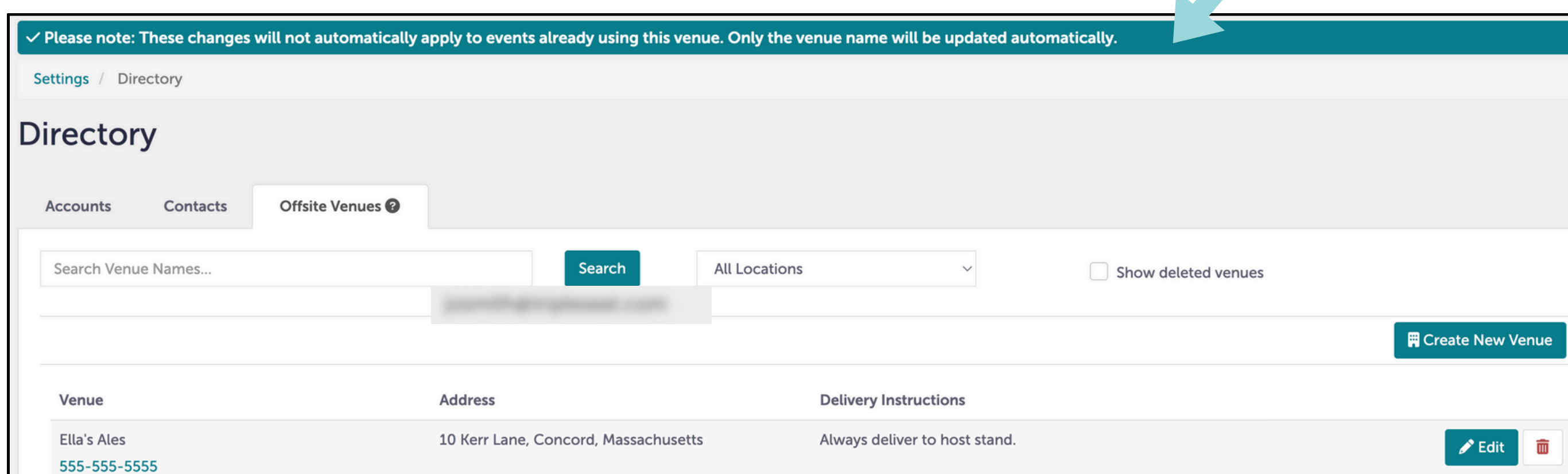
Postal Code:

Delivery instructions: Always deliver to host stand.

Making Changes

If an offsite venue is changed in Settings > Directory > Edit, a banner will appear, alerting that the changes will not apply to events already using that offsite venue and that only the venue name will be automatically updated.

It is important to note that any changes made will impact all locations that use that venue, including locations you do not have access to and cannot see.



✓ Please note: These changes will not automatically apply to events already using this venue. Only the venue name will be updated automatically.

Settings / Directory

Directory

Accounts Contacts **Offsite Venues**

Search Venue Names... Search All Locations Show deleted venues

Create New Venue

Venue	Address	Delivery Instructions
Ella's Ales 555-555-5555	10 Kerr Lane, Concord, Massachusetts	Always deliver to host stand.

Edit

Making Retroactive Changes

To retroactively update events with the latest offsite venue information:

- Go to the event and click edit.
- Under dropdowns, select a different offsite venue.
- Re-select the original offsite venue.
 - This will ensure that the changes are reflected.

Leads

The Offsite Venues dropdown is only accessible for events, not at the lead level.

- If a lead with offsite address details is converted to an event, the details from the lead will remain.
- If the details match a venue in the directory, you can select that venue from the dropdown.

When selected, the venue's address and delivery instructions from Settings > Directory will populate and replace any existing text.

Best Practice: Select the offsite venue from the dropdown for accurate reporting.

! This lead can be converted to booking, event or contact.

[↶ Convert this Lead](#)

Personal Details

[✎ Edit](#)
[⚙️ Actions ▾](#)

Name Amelia Deering

Event Details

Location 📍 Lakeview Grill

When Sat, Jun 8, 2024
🕒 4:00 pm

Event Style Drop-Off Catering

Offsite Address ████████████████████
Concord, Massachusetts

Event Details

Event Name

Booking Amelia Deering drop off
[✎ Edit or Reassign](#)

Date
e.g., 5/31/2024

Drop-Off Time
e.g., 6pm

Status

PROSPECT

TENTATIVE

DEFINITE

CLOSED

LOST

WAITLIST

Location Lakeview Grill

Event style Drop-Off Catering

Offsite Venue

Street Address 10 Kerr Lane

Address Line 2

City Concord

State/Province Massachusetts

Postal Code

Delivery instructions Always deliver to host stand.