# Mastering Events in Simplero

Create and manage your events in Simplero, from registration and reminders to hosting and follow-up. Use this checklist to get everything set up and ready to share. Make a copy and check off each step as you go!

## Before You Start

A few things worth deciding and gathering before you create your event:

- ☐ Decide whether you need a single event or a recurring series
- ☐ Choose where your event will happen: Zoom, Simplero Livestream, Meet/Teams, in person, or another link
- ☐ Connect your Zoom account under Integrations or your Google/Microsoft calendar through your profile, depending on which location you'll use
- ☐ Think through how people will register and access your event. Will registration be required? Will it be open to everyone, restricted to a product or membership, or require payment?
- ☐ Have your event details ready: title, description, date/time, cover image, and host information.
- ☐ Review and personalize your default reminder automation
  Account > Events
  *Your default reminder automation automatically attaches to new events. Customizing it ahead of time saves you from recreating reminders for each event.*

## Create Your Event

Content > Events > Create

- ☐ Enter your event title and internal name.
- ☐ List it on any site you want it to be visible on
- ☐ Choose your event type: Single event or recurring series.
  *A single event can't be converted into a recurring series later*
- ☐ Select your location: Zoom, Simplero Livestream, Meet/Teams, fixed URL, or in person.
  Some location types can't be changed after creation such as Zoom, LiveStream, Google Meet, and Teams
- ☐ Add your description, image, and host details
- ☐ Choose your registration settings: No registration, Automatic approval, Manual approval.

- [ ] Set registration cutoffs, participant limits, and calendar invitations if needed.
- [ ] If you're charging for your event, choose how payment and registration will work:
  - [ ] Register → Pay: Enable Collect Payment so participants pay when registering.
  - [ ] Pay → Register: Set the product to trigger registering for the event instead

  For the full setup, see the Selling and Running Live Events in Simplero workshop.
- [ ] Review your recording settings if you're using Zoom or Simplero Livestream
- [ ] Save your event.

**Once your event is saved:**

- [ ] Add custom registration fields if you need additional information from participants.
- [ ] Review your attached reminder automation and customize or replace it if needed.
- [ ] Add any additional automations or triggers, such as post-event follow-ups, if applicable.

**Helpful to know:** Most event settings can be adjusted later, so you don't need to have everything finalized before saving.

## Share Your Event

Once your event is set up, decide where people will find it and how they'll register

- [ ] Choose how you'll share your event:
  - [ ] Site's Events calendar: Display upcoming events on your site's calendar.
  - [ ] Events element: Feature upcoming events on an existing page
  - [ ] Registration form: Allow people to register directly from a landing page.
  - [ ] Direct link: Share your event through emails, messages, or anywhere else.

  Events elements and registration forms can also be displayed conditionally on landing pages based on tags, products, or other supported conditions.
- [ ] Connect your event to a course or group, if applicable.

- [ ] From the settings of a course or group on the site where your event is listed, you can connect the event series so members can find it alongside related content.
- [ ] Review any visibility or access restrictions to make sure the intended audience can find and register for your event

## Final Check (Before You Share)

Take a few minutes to experience your event from a participant's perspective and make sure everything works as expected.

- [ ] Confirm your event details.
  - [ ] Double-check the date, time, location, and joining instructions.
- [ ] Test registration and access using an incognito window and a non-admin test contact.
  - [ ] Check that the event appears where intended and any visibility or product restrictions work correctly.
  - [ ] For paid events, test registration and checkout.
- [ ] Check your reminders and automations.
  - [ ] Confirm the correct automation is attached and event details display properly.
  - [ ] Include the event location key in at least one reminder email so participants can easily find their joining information.
- [ ] Confirm your recording setup, if you're using Zoom or Simplero Livestream.

Once registrations start coming in, you can use the participant table to track sign-ups and attendance, Send Broadcast to communicate updates, and follow-up automations to share recordings or next steps after your event.

You can refine many details as you go. Start with the settings you need for this event, then build on them next time

Any questions along the way? Just reach out to support@simplero.com
*Note this is up to date to current UI and account options as of October 2026