

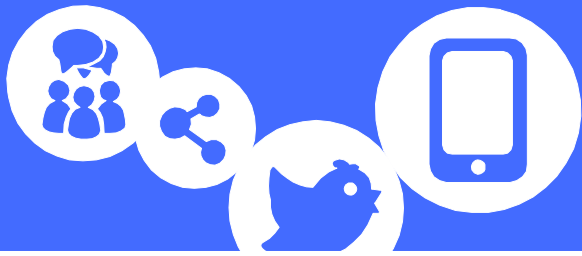


How to:

Administer Attendee Types

EventReference User Guide #5





You should create an attendee type for each different category of attendee such as delegate, speaker, visitor, etc. This enables you to:

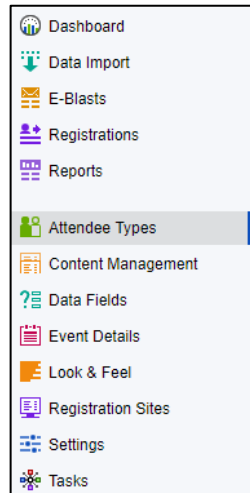
- Produce reports
- Filter your records based on these types
- Customise your registration site for each different attendee type

It will also help if you want to print badges if you need these to be different for each type.

The attendee types can be named as you want but it makes sense that all the names are different and descriptive, for example Delegate, Media, VIP rather than Type 1, Type 2, Type 3, etc. Your event can have as many different attendee types as you like – this is only limited by your intended audience.

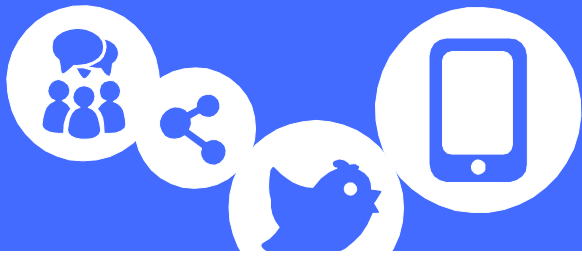
Think carefully about the attendee types you need. You may want to label them by day (delegate day 1, delegate day 2, etc) or level of access for example. You can simplify your reporting by categorising the attendee types.

In the first instance, you should add as many attendee types as you can during the event set up process. If you want to add any more later, click Attendee Types from the menu on the left.



Click  Add Attendee Type

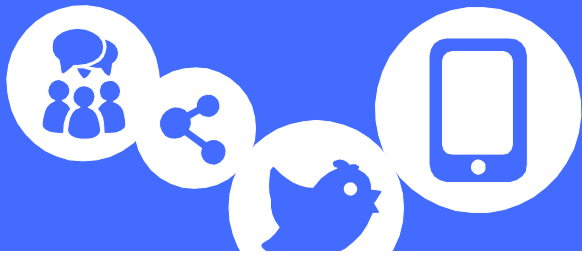
If you have applied any of our add-on bundles to your event, your available options may vary.




Standard Options

You will need to enter some information to set up your attendee type:

- Attendee Type Name – Each attendee type requires a name. For reporting purposes it makes sense that these names are different.
- Registration URL – You can set a custom URL for your attendee type to make managing your links easier and neater e.g. /delegate.
- Registration Open – If you want to open or close registrations for a particular attendee type quickly you can use this function to do so.
- Badge Layout – This is the layout you set for the attendee type if you are using WebBadging.
- Hide on Default Event Page – EventReference creates a basic landing page using the attendee types you can set up. You can hide attendee types from this page by ticking this box.
- Registration Confirmation E-mail – If you want to send automated confirmation emails to registrants, you can set this option here. The email content is entered under Content Management. You can select the required message from the drop down menu. *For further information on adding emails and messages, see the Adding Content guide.*



- Confirmation Onscreen Message – This gives you the option to display a message to the registrant at the end of the process to tell them their registration has been submitted or provide them with some further information. This is also entered under Content Management.
- Invitation Declined Message – You can also set the system to show a message when a delegate declines an invitation to register for your event. Again, this is set up in Content Management as a message and can be selected here.
- Registration Closed Message – If you want to set a custom message that is displayed when your registration is closed, set it up in Content Management and select it here.
- Registration Full Message – This will be displayed when your registration reaches capacity for that attendee type.
- Attendee Status – You can select the status that a registrant is given when they submit their registration. The default is 'Registration Complete' but you can select an alternative from this list.

Click  Save to set up the attendee type.

Additional Options

Save Save & New Cancel

Attendee Type Name

Registration URL

Registration Open

Registration Start : :

Registration End : :

Capacity (0 = Unlimited)

Badge Layout ▼

Hide on Default Event Page

Actions Look & Feel Payments Form

Registration Confirmation E-mail ▼

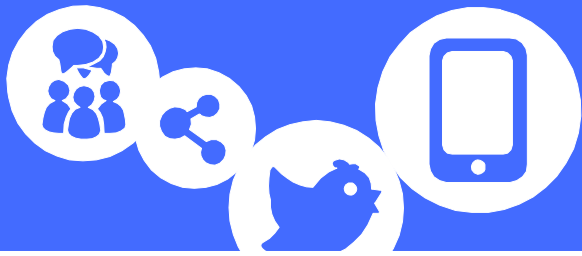
Confirmation Onscreen Message ▼

Invitation Declined Message ▼

Registration Closed Message ▼

Registration Full Message ▼

Attendee Status ▼



If you have applied any of our add-on bundles, you may have a number of additional options.

- Registration Start/Registration End – You can specify the date and time you want your registration site for that attendee type to be open from and to. The system will automatically open and close registration based on the dates and times you have set here.
- Capacity – If you want to only have a specified number of registrations for any one attendee type, you can set a capacity here. Once you reach this number of completed registrations for this attendee type, your registration will automatically be closed and the 'Registration Full Message' will be displayed.

Look & Feel tab (Advanced bundle)

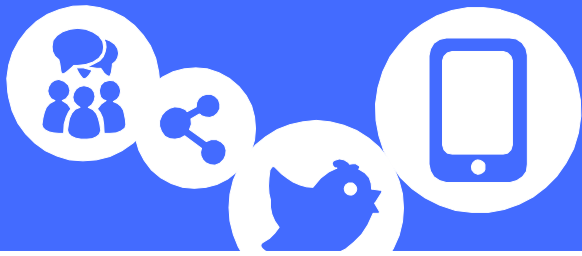
The screenshot shows a settings interface with four tabs: Actions, Look & Feel (selected), Payments, and Form. Under the Look & Feel tab, there are two settings: 'Registration Style' with a dropdown menu set to 'Event Default', and 'Header Graphic' with a 'Choose file' button and the text 'No file chosen'.

- Registration Style – You can specify a different theme for each attendee type if you want by selecting it from the drop down list. The theme selected here will only apply to the attendee type and not the event as a whole.
- Header Graphic – It is also possible to have specific header graphics for attendee types. You can upload them here.

Payments tab (Payment Processing bundle)

The screenshot shows a settings interface with four tabs: Actions, Look & Feel, Payments (selected), and Form. Under the Payments tab, there are two settings: 'Linked Product' with a dropdown menu set to 'No Linked Product', and 'Show Products?' with a dropdown menu set to 'No'.

If you are setting up products and payments for your event, you can link them up here. *More instructions on products and payments can be found in the [Setting up Products and Linking Payment Gateways guides](#).*




Form tab (advanced bundle)

The screenshot shows the 'Form' tab interface with the following elements:

- Navigation tabs: Actions, Look & Feel, Payments, **Form**
- Share Form With: A dropdown menu currently set to 'None / Create a New Form'.
- Default Questions to Show: A list of fields with checkboxes, all of which are checked:
 - Title
 - First Name
 - Last Name
 - Job Title
 - Company Name
 - Tel
 - Mobile
 - Email
 - Website
 - Address 1
 - Address 2
 - Address 3
 - Address 4
 - Address 5
 - Postcode
 - Country

When you first create an attendee type, you are given the option to link it to an existing form or customise the fields that you want the form to contain.

- Share Form With – You can select an existing form that this attendee type will share. *For further information on forms, please see the Using the Form Builder guide.*
- Default Questions to Show – If you are not using an existing form, select the fields you want this attendee type to have on its form by ticking and unticking the boxes next to the field names.

Click  Save to set up the attendee type.

EventReference



Event Registration



Paid Registration



Event Management



WebBadging



Event Reporting



WebScanning

YOUR EVENT. YOUR WAY.

Self-service registration & badging

"I've signed up for EventReference"

"I can't believe how easy it is to get all the reports I need"

"I found it to be fast, powerful and easy to use for my event"

"I was able to extract the information easily, which is perfect"

"Being able to target abandoned registrations helped drive my registration numbers up"

What our customers say...

"We have been using EventReference through RefTech for over two years now and in this time we have seen it develop and progress constantly. As a small, independent conference organiser, Opening Doors & Venues needed a straightforward, pay-per-event platform for gathering registrations, that would be easy to manage in-house - it is exactly what EventReference offered us. We use the platform for both free-to-attend and paid-for registrations with multiple attendee types and varied fee structures and find the interface very user friendly, whether it is for building a landing page or formatting the registration form. We must also applaud the RefTech staff for their patience and promptness in providing the support we constantly require - even though at times we ask the oddest of questions!"

Madalina Marincas, OPENING DOORS & VENUES

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