

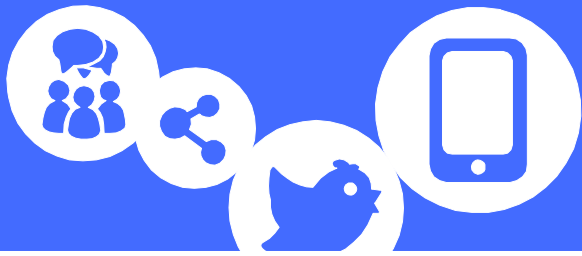


# How to:

## Add and Edit Records in EventReference

EventReference User Guide #7





EventReference allows you to add records without having to go through the registration site and also to edit existing records.

### Adding Records

To add a new record, click **Add New Record** next to the attendee type you want to add.

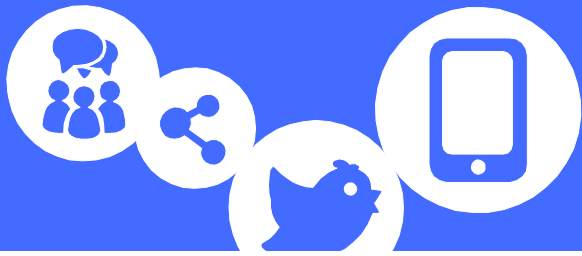
You will see a screen which contains all the questions from your registration form but without the formatting. This allows you to enter the data quickly and easily, for example when taking a registration over the telephone or entering information from a paper registration form.

A screenshot of a web application interface titled "Data Entry". At the top, it says "Attendee Type: Delegate". Below this is a toolbar with three buttons: "Save", "Save & New", and "Cancel". A sidebar on the left is labeled "Attendee Details". The main area contains a list of fields for data entry: "Attendee Status:" (a dropdown menu with "Registration Complete" selected), "Title:", "First Name:★", "Last Name:★", "Job Title:", "Company Name:★", "Tel:", "Mobile:", "Email:★", "Website:", "Address 1:", "Address 2:", "Address 3:", "Address 4:", "Address 5:", "Postcode:", and "Country:" (a dropdown menu with "Please Select" selected). The fields with an asterisk (★) are mandatory.

Any fields you set up to be administration fields when configuring your registration sites will also appear here.

Enter the information, select the status you want the record to have and click  **Save**

Although mandatory fields will be highlighted with an asterisk, these are not validated in data entry mode so the system will allow you to save a record without all these fields being filled in.



## Editing Records

To edit a record, you must first locate the required record. You can do this either by searching or browsing through the registrations. *For more information on how to do this, see the guide on 'Viewing your Registration Data'.*

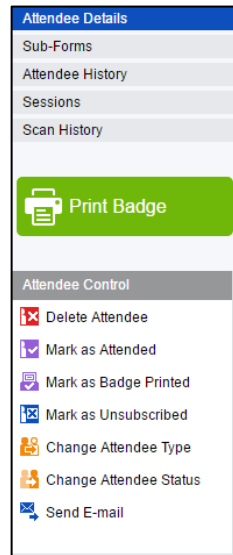
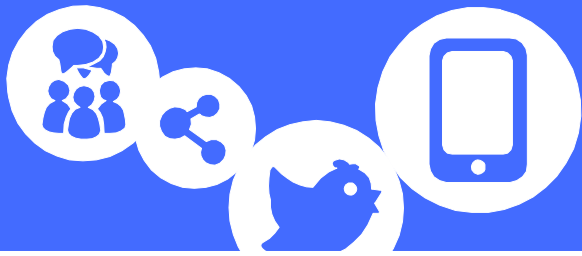
Once you have located the record you want to edit, double click on it and you will see the data entry screen with all the information that has already been entered.

The screenshot shows a web interface for editing an attendee record. At the top, the name 'Joe Bloggs' is displayed. Below this, the company name is 'EventReference' and the attendee type is 'Delegate'. There are three buttons: 'Save', 'Save & Close', and 'Cancel'. On the left, there is a sidebar menu with options: 'Attendee Details' (selected), 'Sub-Forms', 'Attendee History', 'Scan History', 'Print Badge' (with a printer icon), and 'Attendee Control' (with options: 'Delete Attendee', 'Mark as Attended', 'Mark as Badge Printed', 'Mark as Unsubscribed', 'Change Attendee Type', 'Change Attendee Status', and 'Send E-mail'). The main area contains a form with the following fields and values: Title: Mr; First Name: Joe; Last Name: Bloggs; Job Title: Tester; Company Name: EventReference; Tel: 01827818181; Mobile: (empty); Email: support@eventreference.com; Website: www.eventreference.com; Address 1: 1-3 The Pavilions; Address 2: Amber Close; Address 3: Tamworth; Address 4: Staffordshire; Address 5: (empty); Postcode: B77 4RP; Country: United Kingdom; Date Registered: 09:26:12 Wed 10th Aug 2016; How Created: onlinedataentry; Registration Source: (empty); Attendee Status: Registration Complete; UniqueID: 45d0a7a400731457b0fa81912afe2d739fe93159.

To make amendments to the data, simply type in the boxes and click  Save

You will be shown a message telling you that the changes have been saved.

You also have several options that are shown in a menu on the left.



- Attendee Details – the information that has been entered into the reg form
- Sub-Forms – if you have any sub-forms set up, the information from them will appear here.
- Attendee History – Here you can see everything that has happened within the record. This is especially useful for checking emails that have been sent.
- Scan History – If you have had scanning on your event (either WebScanning or a full onsite service from RefTech) then any scans made with the relevant times will appear here.
- Print Badge – This will print the registrant’s badge using WebBadging. *For further information on WebBadging, please see the WebBadging guide.*
- Delete Attendee – To remove the record.
- Mark as Attended – Use this option to show that the registrant attended the event. This can then be used to filter the data to show those who have attended the event and those who haven’t.
- Mark as Badge Printed – mark the registrant as having been printed
- Mark as Unsubscribed – mark the record as unsubscribed – you can filter by this when sending emails so ensure those who have unsubscribed do not receive them.
- Change Attendee Type – Click on this option and select the attendee type you want the registrant to be.
- Change Attendee Status – This option is useful if you need to approve registrants before they can attend your event. You can approve, complete and reject registrations by selecting the relevant status. The data can also be filtered based on the attendee status so you can see a list of all those awaiting approval, for example.
- Send E-mail – This allows you to manually send one of the emails in the system to a registrant. This can be useful if you need to resend a confirmation email, for example. Select the email you want to send from the list.

# 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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