How to:

Create Data Fields in EventReference

EventReference
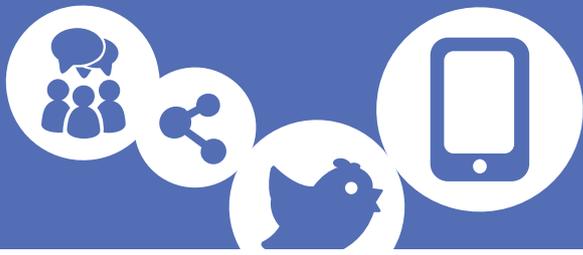
Data fields are your tool for collecting the information you need from your registrants.

To add and edit data fields, select the Data Fields option from the menu on the left.

This will show you a list of all the fields that are already in the system.

Data Field	Answer type	Field Type	Mandatory
Title	Text	Registration	
First Name	Text	Registration	Mandatory
Last Name	Text	Registration	Mandatory
Job Title	Text	Registration	
Company Name	Text	Registration	Mandatory
Tel	Text	Registration	
Mobile	Text	Registration	
Email	Text	Registration	Mandatory
Website	Text	Registration	
Address 1	Text	Registration	
Address 2	Text	Registration	
Address 3	Text	Registration	
Address 4	Text	Registration	
Address 5	Text	Registration	
Postcode	Text	Registration	
Country	Drop Down List (234 choices)	Registration	
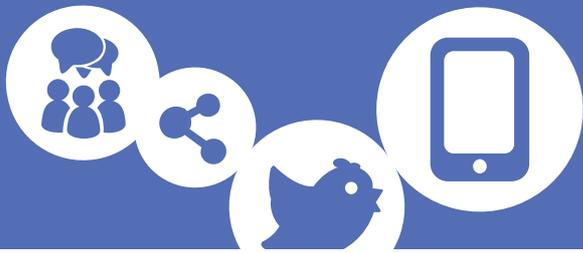
Adding a New Data Field

To add a new data field, click   Add Data Field
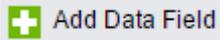
Start by naming your data field. Try to keep it fairly concise – if you want to have more text appear next to the data field you can use the Description feature.

Select the type of answer you want. You have several options to choose from.
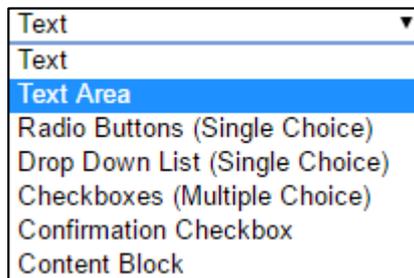
Text Box	A standard text box
Text Area	A larger box to collect a larger amount of text in
Radio Buttons (Single Choice)	Radio buttons to register a single choice
Drop Down List (Single Choice)	A drop down list to register a single choice
Checkboxes (Multiple Choice)	Checkboxes to register multiple choices
Confirmation Checkbox	A single checkbox for 'Tick here to confirm' type questions
Content Block	Place a content block you have created on to your reg form
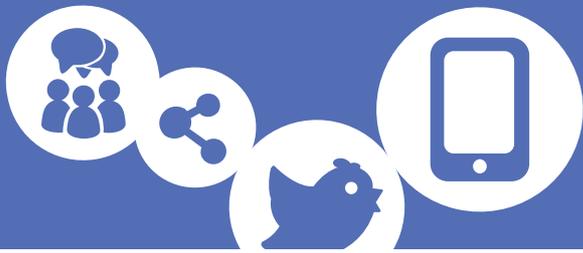
Advanced Field Types (Advanced bundle)

If you have applied our Advanced bundle to your event, you will also have access to some other fields types to further customise your registration form,
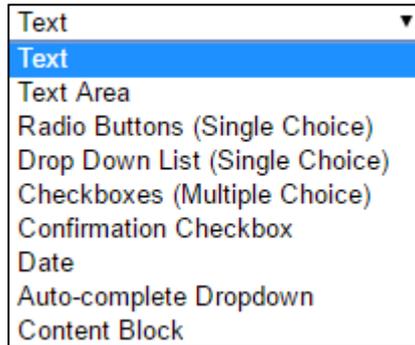
| Date | A calendar for selecting dates from with a customisable range |
| Auto-complete Dropdown | You can specify choices and when someone starts typing in the box, the relevant matching choices appear |

You then have several tabs of options to further configure your data field.

Details

The options visible in the details tab can vary depending on which type of field you are creating.

You can specify whether the field is mandatory or not and, if it is a text field, what sort of characters it can contain.
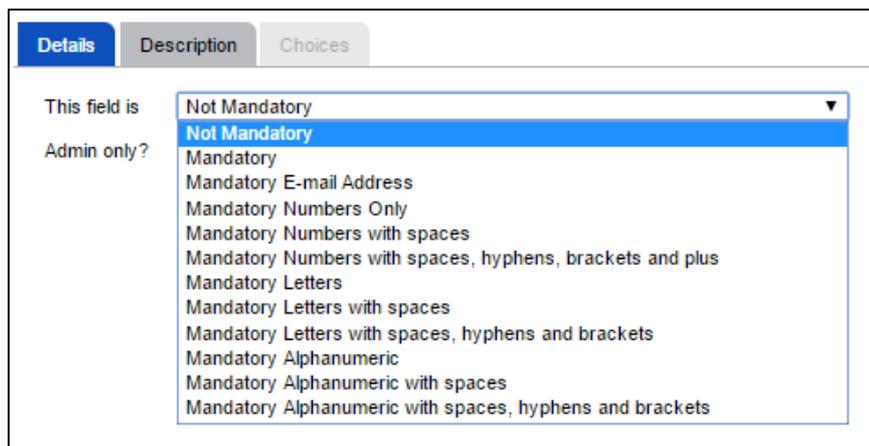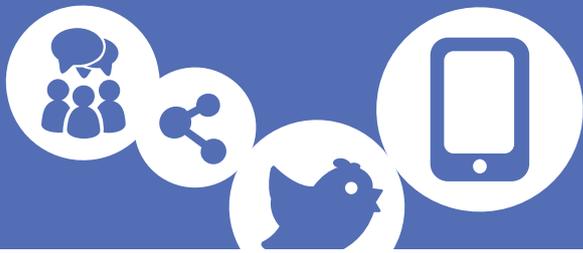
You can also specify whether a field should be 'Admin Only?' If you set this, the field will appear in the event but will not be visible on the registration forms.

If you are adding a content block, the option to select this will appear on this tab. Select the block you need from the dropdown.

Advanced bundle features

If you are adding a text field, you can specify the maximum number of characters it can contain. Set this by entering the number in the box (between 1 and 255).

When you are adding a Date field, you can specify the range of dates available to choose from.
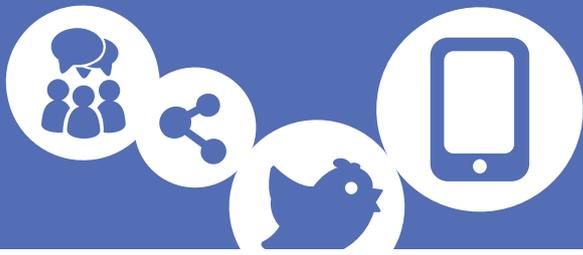
Description

In this tab you can set a description for your data field. You can use this option if you want to provide further information to your registrants, linked to your data field, or if your questions is particularly long (rather than putting it all in the title box). You can also position the description text in relation to the data field. If you don't want a description, simply select Not Visible. Select your positioning and enter your text in the box.
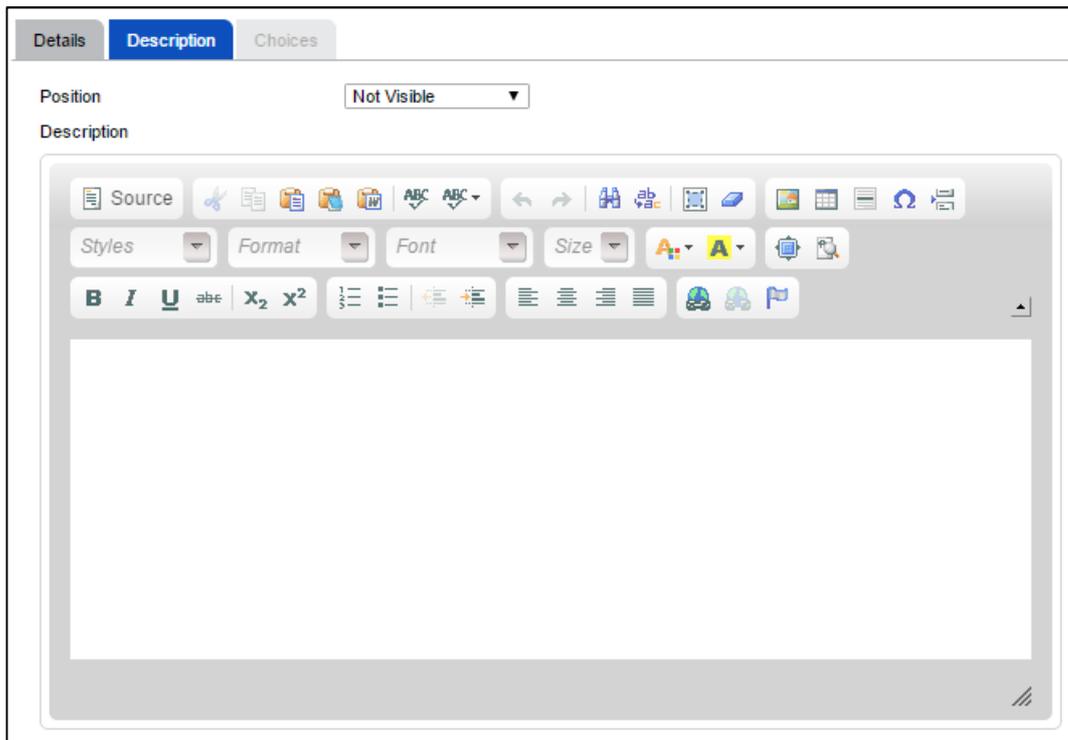
Use the editing tools to format your description so that it will display how you want.

If you are using the description as the question text, tick the Hide Text box next to the data field name.
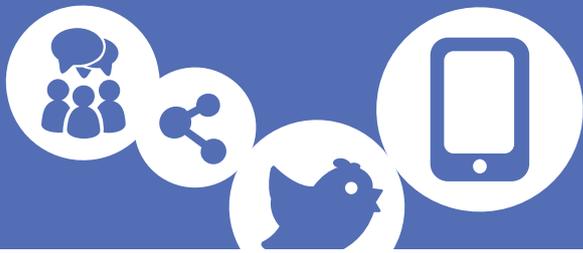
Choices

When you add a question that requires choices, the tab will become active.

Click

Enter the text for your choice and click

To hide the choice from the registration form, tick Admin only. If you want to include a free text box to go along with the choice, for example if your choice is 'Other, please specify', tick the Free text box. This box will only appear when you are creating a choice for a question type that supports it.

You can also add a list of choices at once. Click
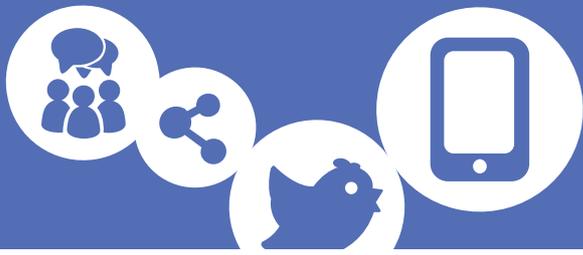
Paste your list of choices into the box, one on each line. To replace the choices currently set up for this question, tick 'Replace existing choices'.
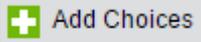
Click and your choices will appear in the list.

Click to set up your data field.

Editing a Data Field

To edit a data field, either one you have created or one that was in the system already, simply double click on it. You will then be able to make changes.

Once you have made changes, the system will show you a message to warn you that you still need to save for these changes to take effect.

You will not be able to make any changes to the field type if you have already published your registration forms. The option will be greyed out and you will not be able to select it.
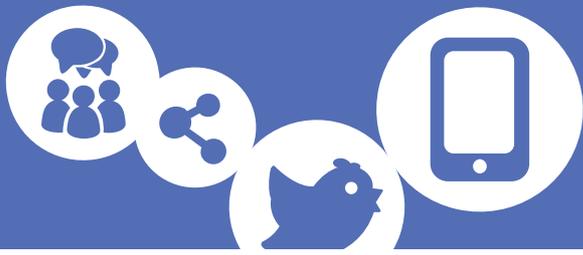
Re-ordering Data Fields

You have the option to re-order the list of data fields on this page. Re-ordering the fields here will only change the order they appear on this page and when you are viewing a record, it will not have any impact on the order of the fields on your registration forms. To change the order of the fields on the registration forms, you should use the form builder. *For more information on using the form builder, please see the Form Builder guide.*

To re-order the fields, click   **⊏≡ Re-order Data Fields**

Highlight the field you want to move and drag it to the position you want it in.

When you are finished moving the data fields, click   **🖥 Edit Data Fields**   to go back.

Deleting a Data Field

To delete a data field, highlight the field you want to delete and click   **🗑 Delete Data Field**

You will be asked to confirm that you want to delete the field so it is difficult to delete a field by accident.

Please note: there are a number of fields that you cannot delete because they are required by the system. You will be alerted if you try to delete any of these. If you do not want these on your form, you can either remove them using the form builder or set them as 'Administration' fields. *For more information on using the form builder, please see the Form Builder guide.*

EventReference

- ✓ Event Registration
- 📅 Event Management
- 📊 Event Reporting
- £ Paid Registration
- 🌐 WebBadging
- ▮ 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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