

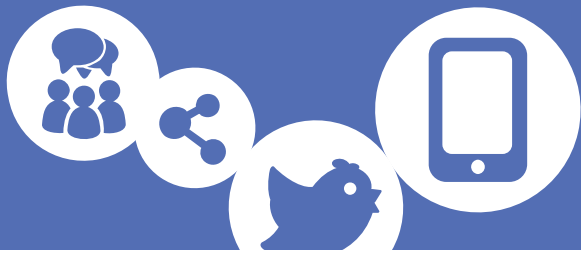


How to:

Design your Registration Forms
using the Form Builder

EventReference User Guide #16





You can design and customise your registration forms with the simple to use Form Builder in EventReference.

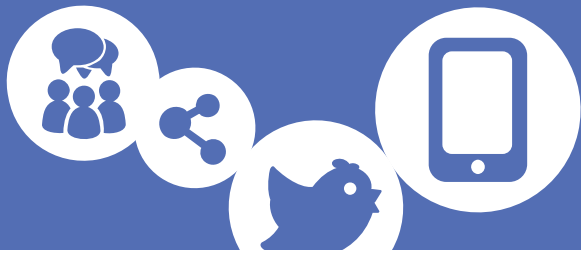
How to access Form Builder

Select Registration Sites from the menu on the left.



Then click **Design Form** next to the attendee type you want to work on. IMPORTANT – separate registration forms for each attendee type is only available with the Advanced add-on bundle.

Attendee Type	Site Status				
Delegate		Design Form	Live	Data Entry	Design Badge
Exhibitor		Design Form	Live	Data Entry	Design Badge



Elements of form builder

The screenshot shows the form builder interface. On the left is a sidebar with the following elements:

- Form Questions tabs
- Switch to a Different Form (orange button)
- Reload Form (refresh icon)
- Change Header Graphic (image icon)
- Change Theme (checkmark icon)
- Create Element (green button with plus icon)
- Attendee Types Using This Form:
 - Delegate (dropdown menu)
 - Exhibitor (dropdown menu)
- Form Status: **Un-Published Changes** (red text)
- Publish Form (button)

The main preview area shows a form titled "Event Name Here" with "Page 1 of 1" below it. The form content includes:

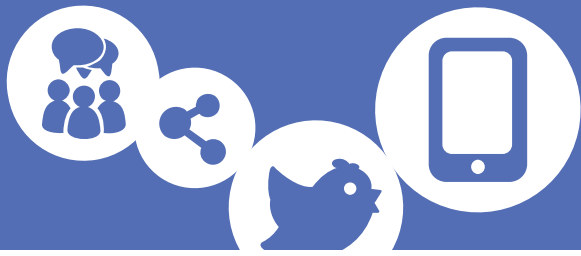
- Text: "Please enter your details." and "Items marked with a * are required."
- Fields: First Name:*, Last Name:*, Job Title:, Company Name:*, and Tel: (partially visible)

Form tab

This image is a close-up of the sidebar controls from the previous screenshot, showing the following elements:

- Form Questions tabs
- Switch to a Different Form (orange button)
- Reload Form (refresh icon)
- Change Header Graphic (image icon)
- Change Theme (checkmark icon)
- Create Element (green button with plus icon)
- Attendee Types Using This Form:
 - Delegate (dropdown menu)
 - Exhibitor (dropdown menu)
- Form Status: **Un-Published Changes** (red text)
- Publish Form (button)

- Switch to a Different Form – Allows you to quickly apply the form from a different attendee type to the current form you are working on (Advanced add-on required)
- Reload Form – Refreshes the form preview
- Change Header Graphic – Allows you to change the header graphic on the form. For standard events, this will change the header graphic for the whole event; for events with the Advanced add-on, this will change the header graphic for just the form/forms you are currently editing

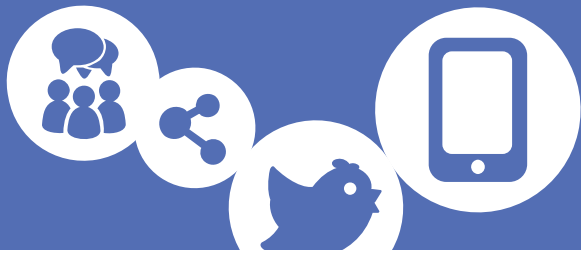


- Change theme for the whole event; for events with the Advanced add-on this will change the header graphic for just the form/forms you are currently editing
- Create Element – Allows you to add data fields to your form without leaving the form builder
- Attendee Types Using This Form – This shows all the attendee types that are linked to the form. Under this you have the option to branch the attendee type off on to its own form (Advanced add-on required)
- Edit Attendee Type – Opens the Attendee Type in EventReference so you can edit the properties (for more information, see the *How to: Administer attendee types in EventReference* guide)
- Branch this attendee type into its own form (Advanced add-on required) – separates this attendee type to its own form, so you are only editing the one form. Will allow you to create different forms for different attendee types
- Form Status – Shows whether the form is published or unpublished
- Publish Form – Publishes the form so the changes are applied to the live form

Questions tab

The screenshot displays the 'Questions' tab in the EventReference interface. At the top, there are two tabs: 'Form' and 'Questions', with 'Questions' being the active tab. Below the tabs, there is a section titled 'Unused Questions' which includes a text input field for 'Title' and two buttons: 'Collapse All' and 'Expand All'. Underneath this is a dropdown menu labeled 'Page #1'. The main area of the tab contains a list of form fields, each with a text input box: 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.

- Unused Questions – Lists any questions which do not appear on the current form
- Pages – Lists the questions that are on each page (for events without the Advanced add-on, this will only show Page #1 with no option to add more).
- Collapse All – Minimises all the page lists at once (useful if you have a long, multiple page reg form)
- Expand All – Opens all the page lists at once



Form preview

This shows the form as it currently looks. You can also edit the form from here too.

Event Name Here

Page 1 of 1

Please enter your details. Items marked with a * are required.

First Name:*

Last Name:*

Job Title:

Hovering over a field gives you several options:

- Edit – allows you to edit the field properties. The options available vary depending on field type and whether you have any add-on bundles applied to your event (more detail below)
- Delete – removes the field from the form (but doesn't delete it from the event). It will be visible in the Unused Questions list in the question tab.
- Move – you can drag the field to a new position within the form.

How to use form builder

Using form builder is really simple and you can customise your registration form in just a few steps.

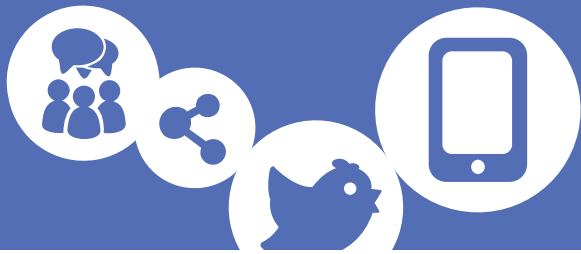
Creating a single page registration form

As standard, EventReference will generate a single page registration form, containing all the default fields and any additional fields you may have created during the wizard process. If you have added any fields in the Data Fields tab within EventReference, these will not be included on the form at this point.

Adding fields – from Unused Questions

To add an unused field on to your registration form, click on the field in the Unused Questions list and drag it down to where you want it in the list below. The page will then refresh and you will see the field on the form preview.

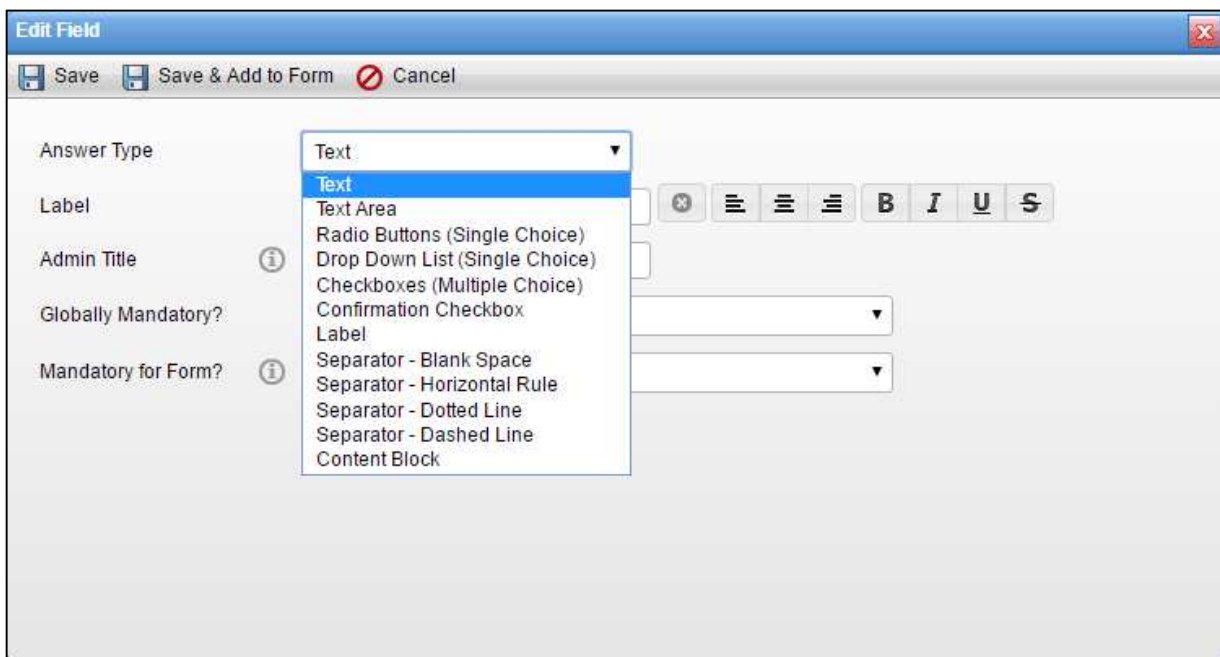
You cannot drag a field from the Unused Questions list directly on to the form preview.



Adding fields – brand new

If you want to add more fields to your form, you do not have to leave the form builder.

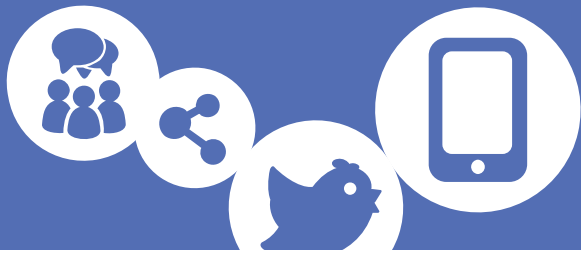
Click on the Form tab and then Create Element.



Select what you want to create. You have the option of creating data fields (additional options available for events with the Advanced add-on) or design items (separators etc) for your form.

Fill in the options. These may vary depending on the element selected or whether you have any add-on bundles applied to your event.

- Answer Type – select the type of element you want to add
- Label – What you want to display next to the field on the form
- Admin Title – If entered, this will be the title shown for this data field when viewing registration data in the admin website
- Globally Mandatory – If a field is marked as globally mandatory, then it will be mandatory for all Attendee Types, regardless of any other settings.
- Mandatory for Form – If a field is not marked as globally mandatory, then it will only be mandatory on forms where the “mandatory for this form” option has been selected (multiple different forms only available with the Advanced add-on)
- Character Limit (text fields only – If a field has a character limit set, the user will only be able to enter that number of characters into the field. All characters including spaces and punctuation are counted. Advanced add-on required.



- Read-Only – If a field is marked 'Read Only' then the data for the field will be shown to the user without the ability to edit it. This only applies to people accessing the registration form via a smart-link and is available with the Advanced add-on.

If you have added a field that requires choices, you will have to go back in and edit the field to set these up.

To add a choice, type your choice text in the box next to the + sign. Then click out of the box and your choice will be created.

Choices	Admin-Only?	Free Text?	Default?
Choice 1	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>
+ Choice 2			

You can delete a choice by hovering over the choice you want to delete and clicking the X on the right.

+ Choice 2	<input type="checkbox"/>	<input type="radio"/>	<input type="radio"/>	X
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To re-order your choices, hover over the one you want to move, click on the icon on the left and then drag it to the position you want.

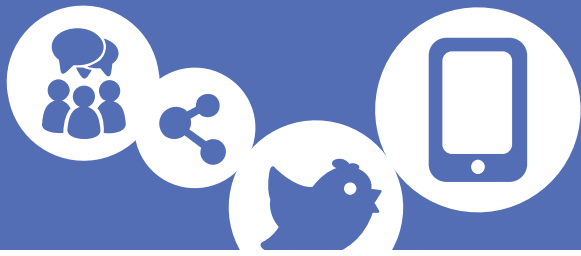
You can also set choices to be Admin-Only (these will only appear when you are viewing a record and not on the registration form), have a Free Text box associated with them (if, for example, you have an 'Other, please specify' option) or be the default selection (this will be selected from the start and the registrant will change this if they require a different option).

Removing fields

There are two ways you can remove a field from a form.

The first is to hover over the field in the preview and then select the Delete icon from the options available.





You will be asked to confirm that you want to remove the field from the form.

This process will only remove the field from the form, it will not delete it from the event so you can easily re-add it if necessary.

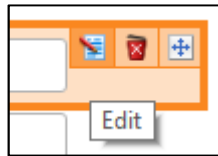
The second way to remove a field from a form is to use the Questions tab.

If you have an Unused Questions option, you can drag the field from the main list to the Unused Questions list and it will be removed from the form.

Re-ordering fields

There are also two ways you can re-order your fields.

On the form preview, hover over the field you want to move and then select the Move icon from the options available.

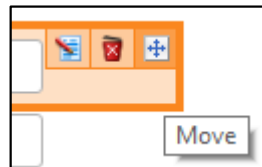


This then allows you to drag the field to the position you want within the form.

You can also re-order the questions in the Questions tab by clicking and dragging them to the required position. You cannot drag a field from the Unused Questions list directly on to the form preview.

Editing fields

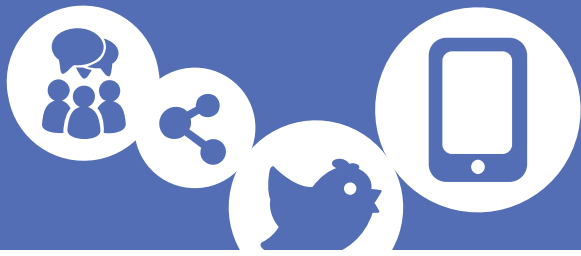
To edit a field, hover over it on the form preview and then select the Edit icon from the options available.



This will display the edit options available for this field type (these may vary depending on the type of the field selected and whether you have any add-on bundles applied).

If you are editing a field which includes choices, you will be able to add to or edit these.

To edit a choice, double click on it and you will be able to edit the text. You can also select/deselect any of the other options.



Click Save when you are finished editing your field.

Creating a multiple page registration form

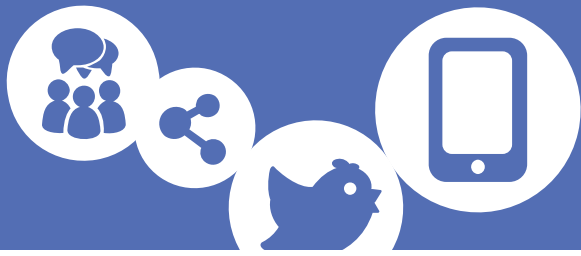
With the Advanced add-on, you can create registration forms with multiple pages.

On your Questions tab, you will have a Page #2 option under your list for page one. Simply drag the fields you want on the second page of your form down to under the Page #2 heading.

You'll then see an option appear for a Page #3. You can keep adding fields to subsequent pages to create as many as you need.

The screenshot shows the 'Questions' tab of a registration form editor. At the top, there are two tabs: 'Form' and 'Questions', with 'Questions' being the active tab. Below the tabs are two buttons: 'Collapse All' and 'Expand All'. The main content area is divided into three sections, each with a dropdown menu for page selection. The first section is 'Page #1' and contains the following fields: Title, First Name, Last Name, Job Title, Company Name, Tel, Mobile, Email, and Website. The second section is 'Page #2' and contains the following fields: Address 1, Address 2, Address 3, Address 4, Address 5, Postcode, and Country. The third section is 'Page #3' and contains a button that says 'Drag here to add a new page'.

To preview these, use the 'Next' button on the form preview screen to move through the pages and you'll be able to see and edit your pages in the preview screen as before.



Professional Event

Page 1 of 2

Please enter your details. Items marked with a * are required.

Title:	<input type="text"/>
First Name:*	<input type="text"/>
Last Name:*	<input type="text"/>
Job Title:	<input type="text"/>
Company Name:*	<input type="text"/>
Tel:	<input type="text"/>
Mobile:	<input type="text"/>
Email:*	<input type="text"/>
Confirm Email:*	<input type="text"/>
Website:	<input type="text"/>

[Next](#)

Create different forms for different attendee types (Advanced add-on required)

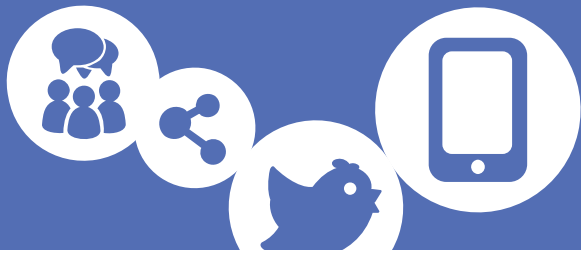
If you have the Advanced add-on, you can customise your registration forms for different attendee types.

To do this, you'll need to 'branch' the form off so that you are editing it on its own.

On the Form tab, click the icon on the right next to the attendee type you want to branch onto its own form. You will be asked to confirm that you want to do this.



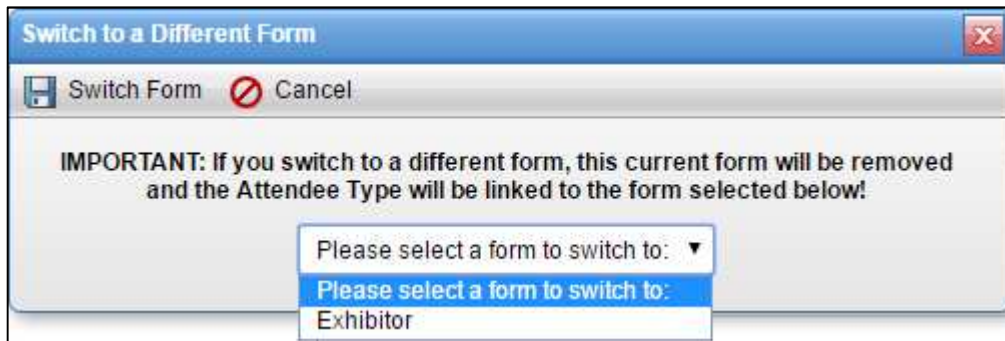
Once you click ok, you will see that only the form you have branched off is showing under the 'Attendee Types Using This Form' header and you can carry on editing the current form without affecting any of the others.



You can also re-group forms together, to allow them to share the same form. This saves you from having to edit each form on its own when they are to be the same.

To do this, firstly make sure that you are only working on one form by branching off if necessary.

Then click Switch to a Different Form.



Select the form you want to join the current form to and click Switch Form. The forms will be linked together and will both take on the design of the form you select from the drop down 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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