

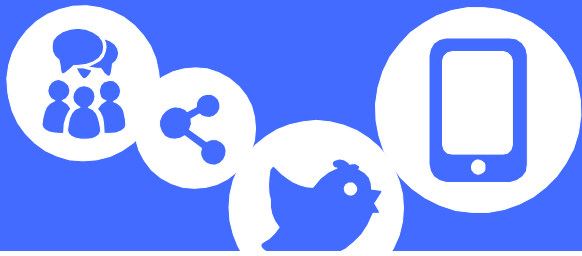


How to:

Set-up Register a Colleague

EventReference User Guide #25





The register a colleague feature allows you to clone fields into the next registration form to save the registrant from having to enter the details again. This is available with the Advanced add-on bundle.

To set up register a colleague, first you need to set the fields that you want to clone into the next registration (this is usually company details).

Go into Data Fields and double click on the field you want to clone.

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Save Save & New Cancel You have unsaved changes

Data Field Name: Company Name Hide Text?

Admin Title:

Answer type: Text

Details Description Choices

This field is: Mandatory

Admin only?

Clone this field?

Tick Clone this field.

Do this for each field you want to be cloned.

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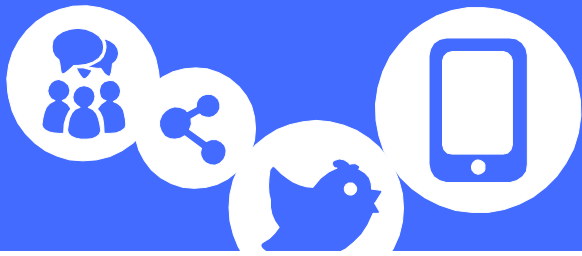
Administrator Event My Projects My Eve

Add Data Field Delete Data Field Design Registration Forms Re-order Data Fields

Data Field	Answer type	Field Type	Mandatory	Published?	
Title	Text	Registration		Yes	
First Name	Text	Registration	Mandatory	Yes	
Last Name	Text	Registration	Mandatory	Yes	
Job Title	Text	Registration		Yes	
Company Name	Text	Registration	Mandatory	Yes	Cloned
Tel	Text	Registration		Yes	
Mobile	Text	Registration		Yes	
Email	Text	Registration	Mandatory	Yes	
Website	Text	Registration		Yes	Cloned
Address 1	Text	Registration		Yes	Cloned
Address 2	Text	Registration		Yes	Cloned
Address 3	Text	Registration		Yes	Cloned

Make sure you publish your form so that the changes take effect. To do this, go to Registration Sites and click Publish.

Next you need to add the link for registrants to click on. This can be added to both the confirmation message and email if you want.



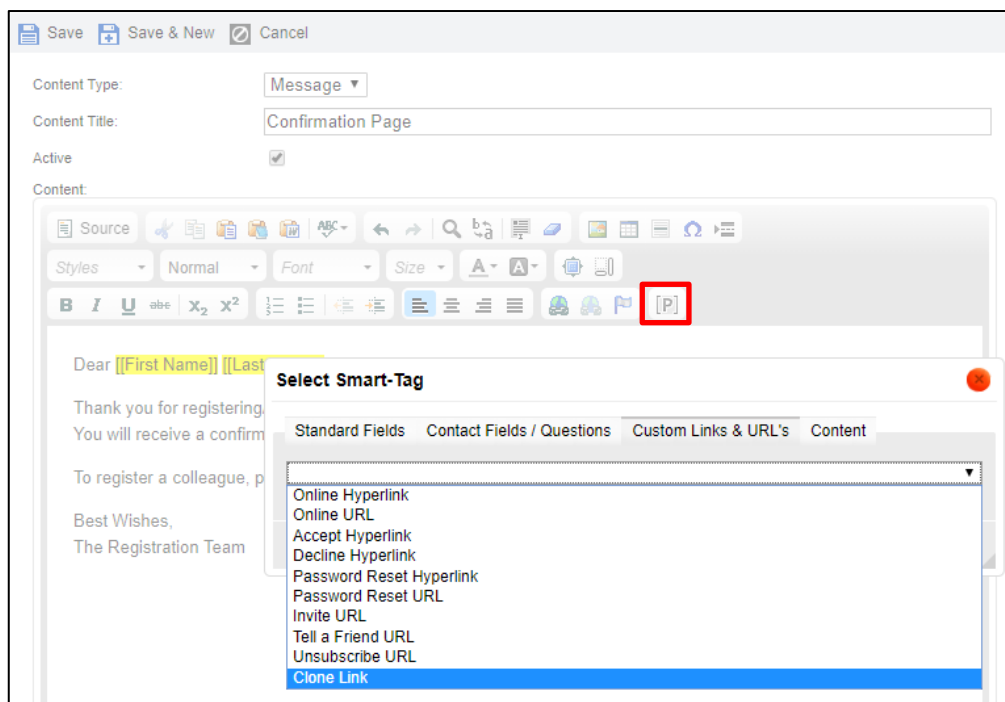
Go to Content Management.

Open the content you want to edit.

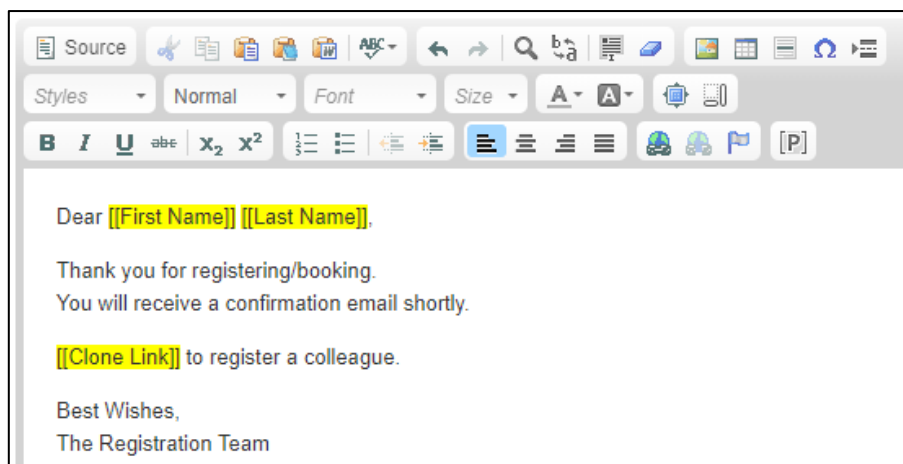
Click where you want the link to go.

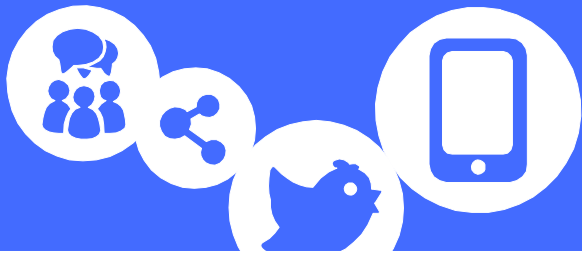
Click the [p] icon in the editor.

Select the tab for Custom Links and URLs and then you need to select 'Clone Link'.



This will add a placeholder that looks like this:





When the link is displayed in an email or on a page, it will actually show as the text *click here* so you should consider that when incorporating it into your text.


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Dear Event Reference,

Thank you for registering/booking.
You will receive a confirmation email shortly.

[Click here](#) to register a colleague.

Best Wishes,
The Registration Team

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Clicking the link will bring up a new registration form, of the same attendee type, with the cloned fields filled in using details from the previous registration.

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Please enter your details. Items marked with * 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" value="EventReference"/>
Tel:	<input type="text"/>
Mobile:	<input type="text"/>
Email:*	<input type="text"/>
Confirm Email:*	<input type="text"/>
Website:	<input type="text"/>
Address 1:	<input type="text" value="EventReference"/>
Address 2:	<input type="text" value="1-3 The Pavilions"/>

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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