

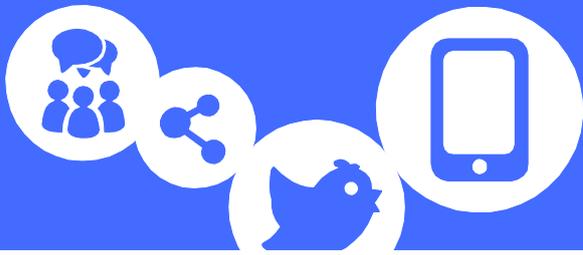


How to:

Manage your EventReference Subscription

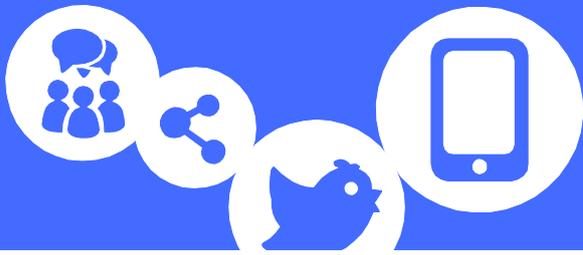
EventReference User Guide #27



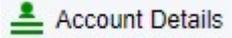


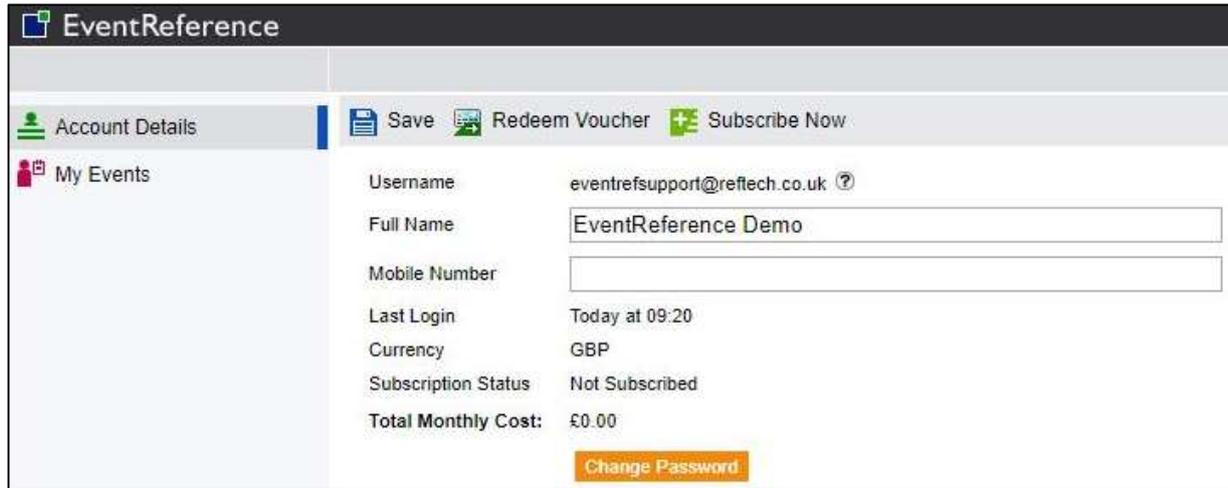
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Subscribing to EventReference

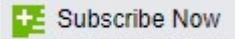
To start your subscription, log in to EventReference and then click on 



The screenshot shows the EventReference user interface. At the top, there are navigation buttons: 'Account Details', 'Save', 'Redeem Voucher', and 'Subscribe Now'. Below this is a sidebar with 'My Events'. The main content area displays account information:

Username	eventrefsupport@reftech.co.uk ?
Full Name	EventReference Demo
Mobile Number	
Last Login	Today at 09:20
Currency	GBP
Subscription Status	Not Subscribed
Total Monthly Cost:	£0.00

At the bottom of the account details section, there is a 'Change Password' button.

Click  and you will be shown a screen which will tell you how much you will pay. You will be charged upfront and then automatically billed each month on the same date, until you cancel.



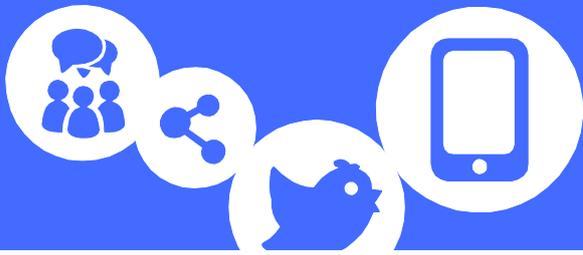
The screenshot shows a 'Subscribe Now' dialog box with a close button (X) in the top right corner. It contains the following information:

Cost Today: £19.95
Monthly Cost : £19.95

You will be automatically billed for £19.95 on the 12th of March, 2020

At the top left of the dialog, there are buttons for 'Subscribe' and 'Cancel'.

Click  and you will be taken to our payment gateway to enter your card details.



Subscribe Now [Close]

You are about to make a payment of
£19.95
for
RefTech Services Limited

Reference: **11271**

12 Feb 2020

Qty	Description	Unit Cost
	Subscription	£19.95
	Total	£19.95

Merchant details
RefTech Services Limited

  **VISA VISA** Debit

Name [?] [?]

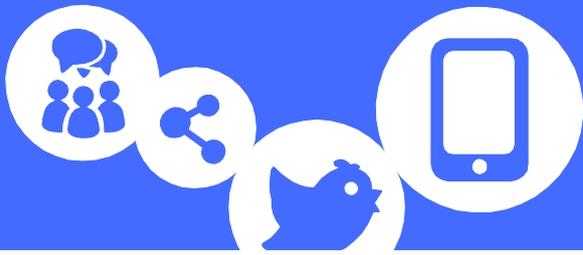
Email Address

Address Line 1 [?] [?]

Fill in the required information and then click **PAY NOW** at the bottom.

You will receive a couple of emails – one a receipt from the payment gateway and also a full VAT receipt from us.

Congratulations! You are now an EventReference subscriber.



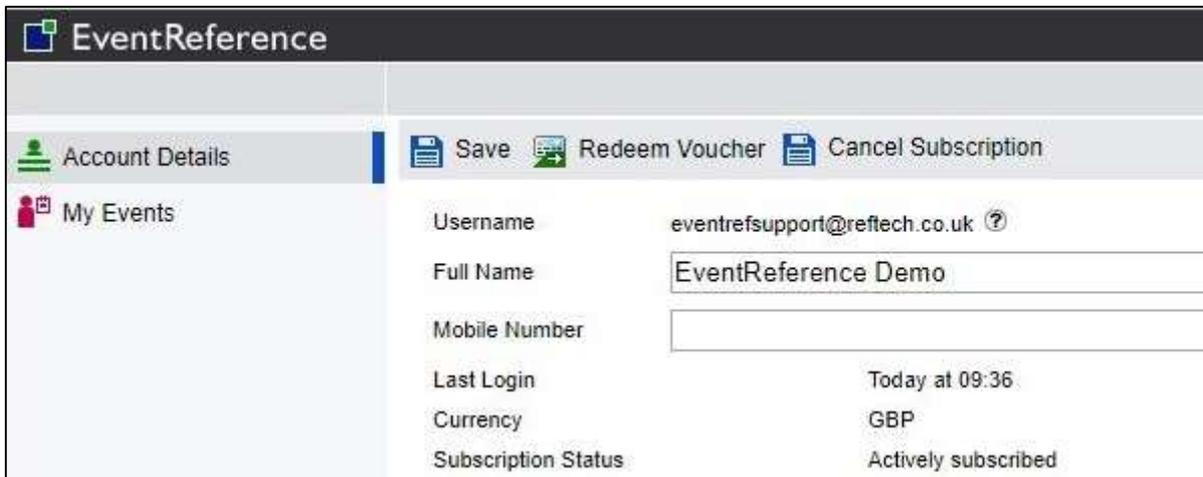
Canceling your EventReference Subscription

You can cancel your subscription at any time.

Important Information

Canceling your subscription will result in your events being removed. These can not be recovered if you re-subscribe so if you need to retain access, you should keep your subscription active.

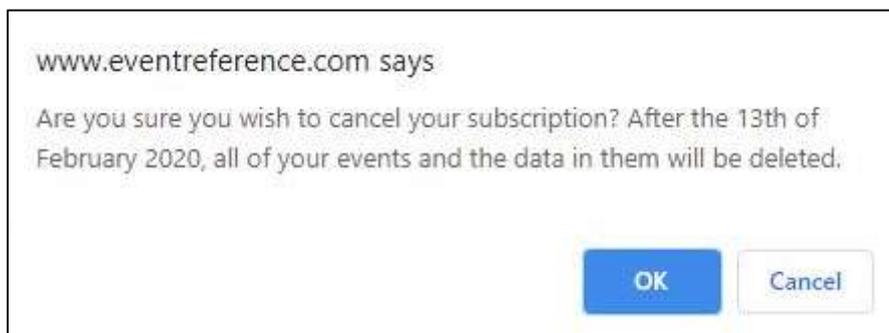
Click on  Account Details



The screenshot shows the EventReference user interface. On the left is a navigation menu with 'Account Details' and 'My Events'. The main area displays account information:

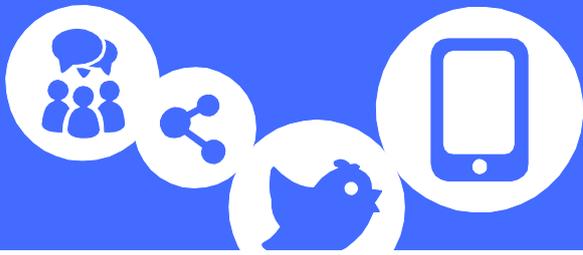
Account Details	Save	Redeem Voucher	Cancel Subscription
Username	eventrefsupport@reftech.co.uk ?		
Full Name	EventReference Demo		
Mobile Number			
Last Login	Today at 09:36		
Currency	GBP		
Subscription Status	Actively subscribed		

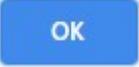
Click  Cancel Subscription and you will be shown a message asking you to confirm you want to cancel.

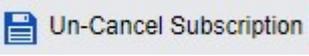


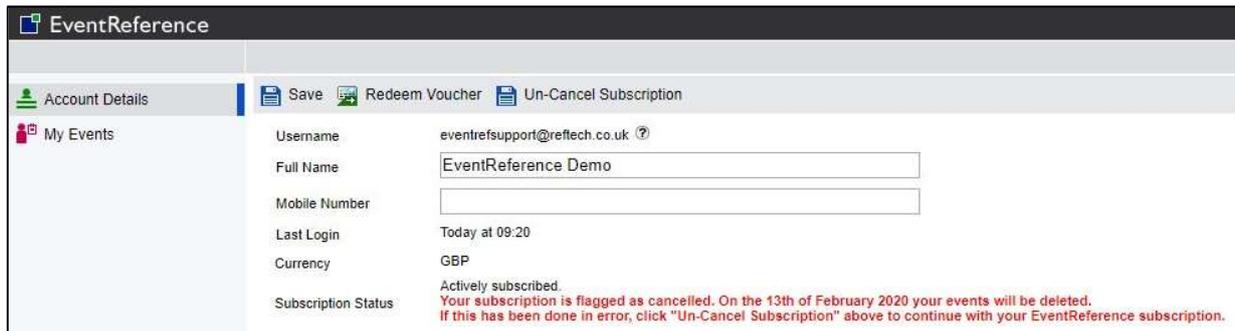
www.eventreference.com says

Are you sure you wish to cancel your subscription? After the 13th of February 2020, all of your events and the data in them will be deleted.



Click  if you are happy with this.

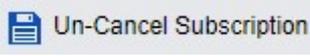
You will then see an  button at the top of the page and some red text explaining what will happen next.

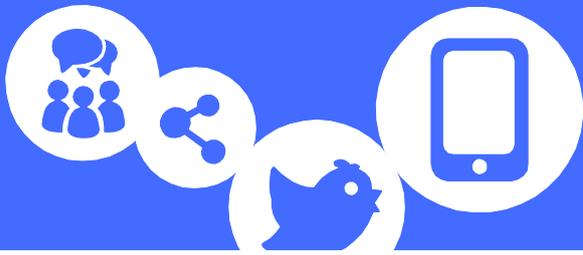


EventReference	
Account Details	Save Redeem Voucher Un-Cancel Subscription
My Events	Username: eventrefsupport@reflech.co.uk ?
	Full Name: <input type="text" value="EventReference Demo"/>
	Mobile Number: <input type="text"/>
	Last Login: Today at 09:20
	Currency: GBP
	Subscription Status: Actively subscribed.
	Your subscription is flagged as cancelled. On the 13th of February 2020 your events will be deleted. If this has been done in error, click "Un-Cancel Subscription" above to continue with your EventReference subscription.

As you pay up front, your account will remain active until your next billing date. When you cancel your subscription, rather than take a payment on this date, we will remove your events.

You have until this date to un-cancel if you change your mind and decide you want to carry on subscribing.

To un-cancel, click on  and your subscription will carry on as before.



Activating an Event

To be able to start taking live registrations, you must first activate your event.

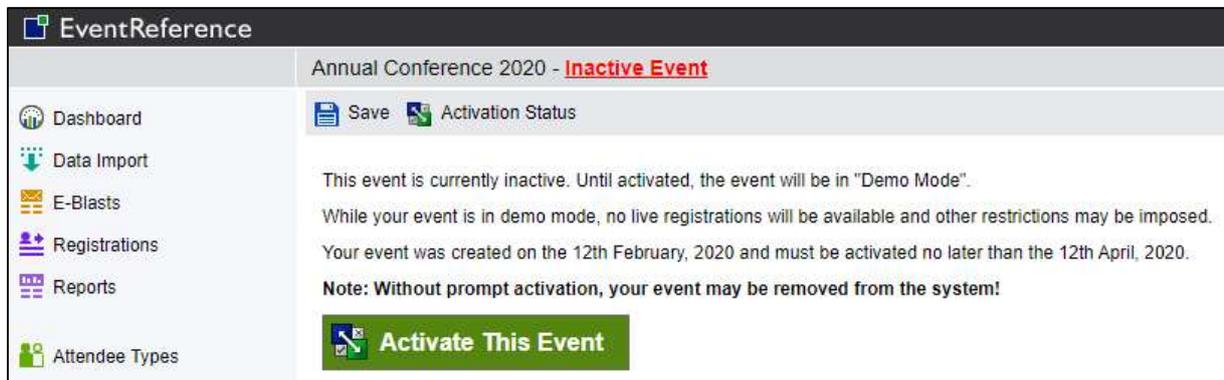
You will be able to see when an event is not active as there will be some red text saying **Inactive Event** at the top.

Your registration form will also have a banner across the top as below.

Unpaid Event - Admin Use Only

To activate your event, either click on **Inactive Event** or  Event Details

You will be shown some text which will show you when you need to activate your event by. If you do not activate your event by this date, the event will be removed and cannot be recovered.

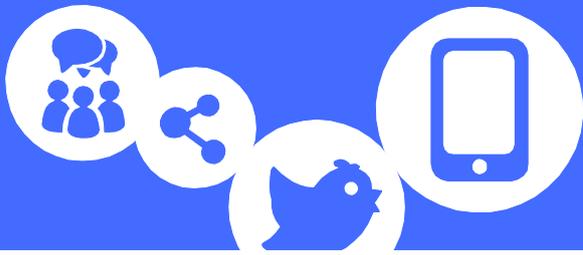


The screenshot shows the EventReference interface for an event titled "Annual Conference 2020 - **Inactive Event**". The left sidebar contains navigation options: Dashboard, Data Import, E-Blasts, Registrations, Reports, and Attendee Types. The main content area includes a "Save" button, an "Activation Status" button, and a message: "This event is currently inactive. Until activated, the event will be in 'Demo Mode'. While your event is in demo mode, no live registrations will be available and other restrictions may be imposed. Your event was created on the 12th February, 2020 and must be activated no later than the 12th April, 2020. Note: Without prompt activation, your event may be removed from the system!". A prominent green button labeled "Activate This Event" is visible at the bottom of the main content area.

Click



You will be shown a summary about the event and what the cost will be to activate. This will depend on how many active events you already have running on your subscription.

A screenshot of the EventReference web interface. The title bar reads "EventReference" and the page title is "Annual Conference 2020 - **Inactive Event**". On the left is a navigation menu with icons for Dashboard, Data Import, E-Blasts, Registrations, and Reports. On the right, there are two buttons: "Activate Event" and "Event Details". Below these buttons, the following details are listed:

Bundles Added	: None
Event Activated?	: No
Demo Mode?	: Yes
Activation Cost	: £3.95
Monthly Cost	: £3.95

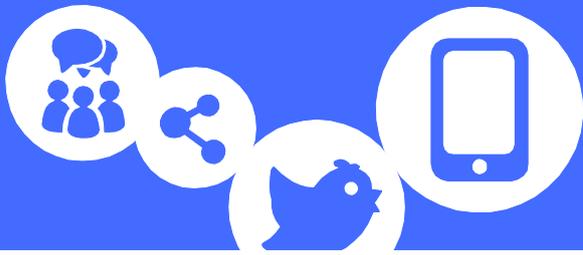
Click  **Activate Event**

If a payment is required, you will be transferred to our payment gateway to make this. The cost will be added to the card you used to subscribe but you will need to confirm this. We will also take an upfront payment which is pro-rated to your billing date.

Once you have done this, your event is active.

To remove the Unpaid Event banner from your forms, click on  **Registration Sites** and then click  **Publish**

This will refresh your forms ready to use and remove the banner.



Deactivating an Event

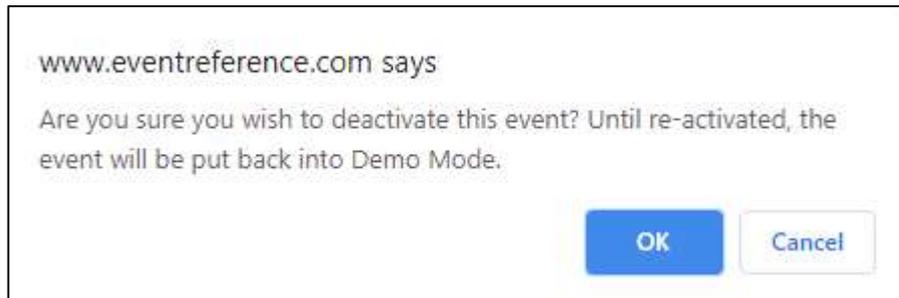
You can have up to 5 concurrent active events on your subscription at any time, without incurring any additional costs. It is therefore good practice to deactivate events when you are finished with them to ensure you are not paying more than you need to.

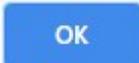
Inactive events will remain on your account. You can still access these for reporting purposes and all data will be retained, however you will not be able to take live registrations unless you re-activate them.

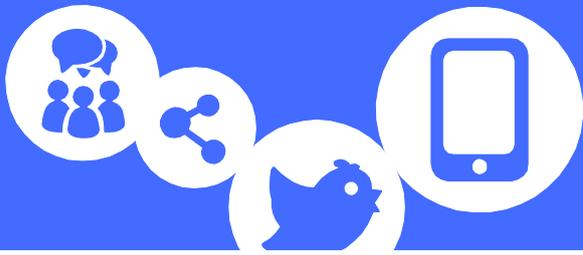
To deactivate your event, click on  **Event Details** and then click  **Activation Status**

Click  **Deactivate Event**

You will be asked to confirm that you want to deactivate your event.



Click  to confirm.



Enabling an Add-on Bundle

EventReference offers a number of add-on bundles which allow you to customise the features you have on your event and only pay for what you need.

These are billed per-month, per-event and can be added and removed at any time.

To enable an add-on bundle, email support@eventreference.com with the name of the event and what add-on bundles you'd like.

We will email you with personalised links to activate these.

NOTE: there will be one link for each add-on that you need and the links will only work for the event you have requested them for.

Click on the link.

The page you requested previously is currently not available for your event.

The features needed to activate the requested page are:

- Payments

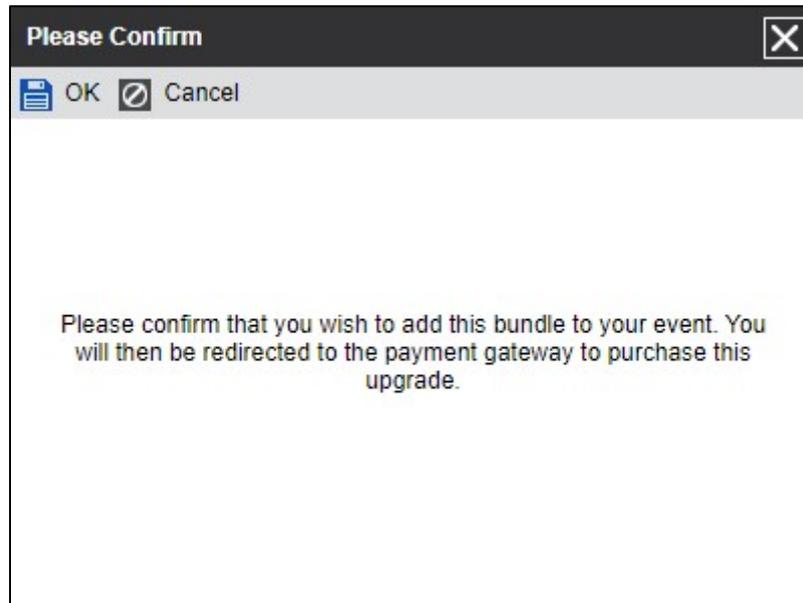
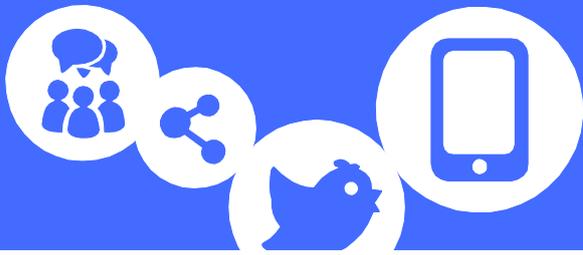
The event bundles required to upgrade your event and unlock the requested page are:

- Payment Processing: £19.95 extra per month, per event

 **Add Bundles to**

Click  **Add Bundles to**

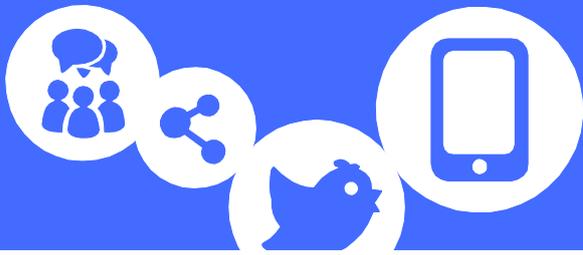
You will then be asked to confirm that you want to add this bundle to your event.



Click  OK

You will be transferred to our payment gateway to make the required payment. The cost will be added to the card you used to subscribe but you will need to confirm this. We will also take an upfront payment which is pro-rated to your billing date.

Once you have done this, the features will be added to your event ready for you to use.



Removing an Add-on Bundle

Add-on bundles can be removed at any time. Removing a bundle will remove all the features included in that bundle from your event.

Click on  **Event Details** and then click  **Activation Status**

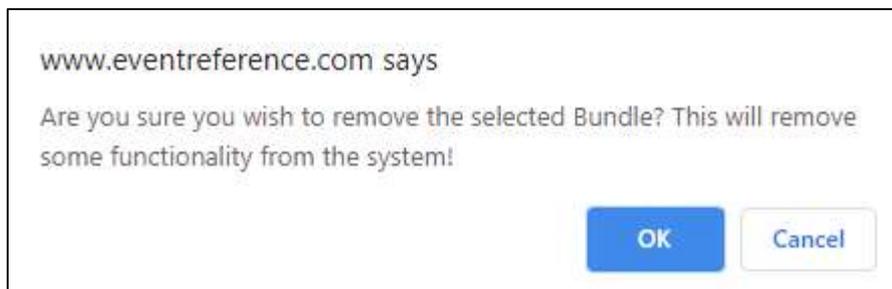
You will see a list of everything that is active on your event.



EventReference	
Annual Conference 2020	
 Deactivate Event	 Event Details
Bundles Added	: Advanced Functions @ £14.95p/m 
	: Payment Processing @ £19.95p/m 
	: Security and Capacity @ £29.95p/m 
Event Activated?	: Yes
Demo Mode?	: No
Monthly Cost	: £53.85

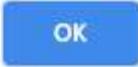
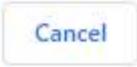
To remove an add-on bundle, click  next to the bundle you want to remove.

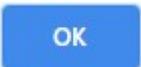
You will be asked to confirm that you want to remove the bundle.



www.eventreference.com says

Are you sure you wish to remove the selected Bundle? This will remove some functionality from the system!

Click  to confirm.

The features will be removed from your event and the cost taken off your subscription payment so you won't pay this at your next billing date.

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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 www.eventreference.com

@ support@eventreference.com