Infinite

Event Management Do-It-Yourself User Guide

Last Revised 9/6/11

Version 1

Powered by etouches

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MODULES

eReg Module

The eReg module has everything necessary to create your event registration and it supports housing and travel management, payment collection, look and feel, and comprehensive reporting. This module also includes a viral ticketing function that automates payments and refunds to attendees who pass and receive a viral code through social networks such as Twitter, Facebook and LinkedIn.

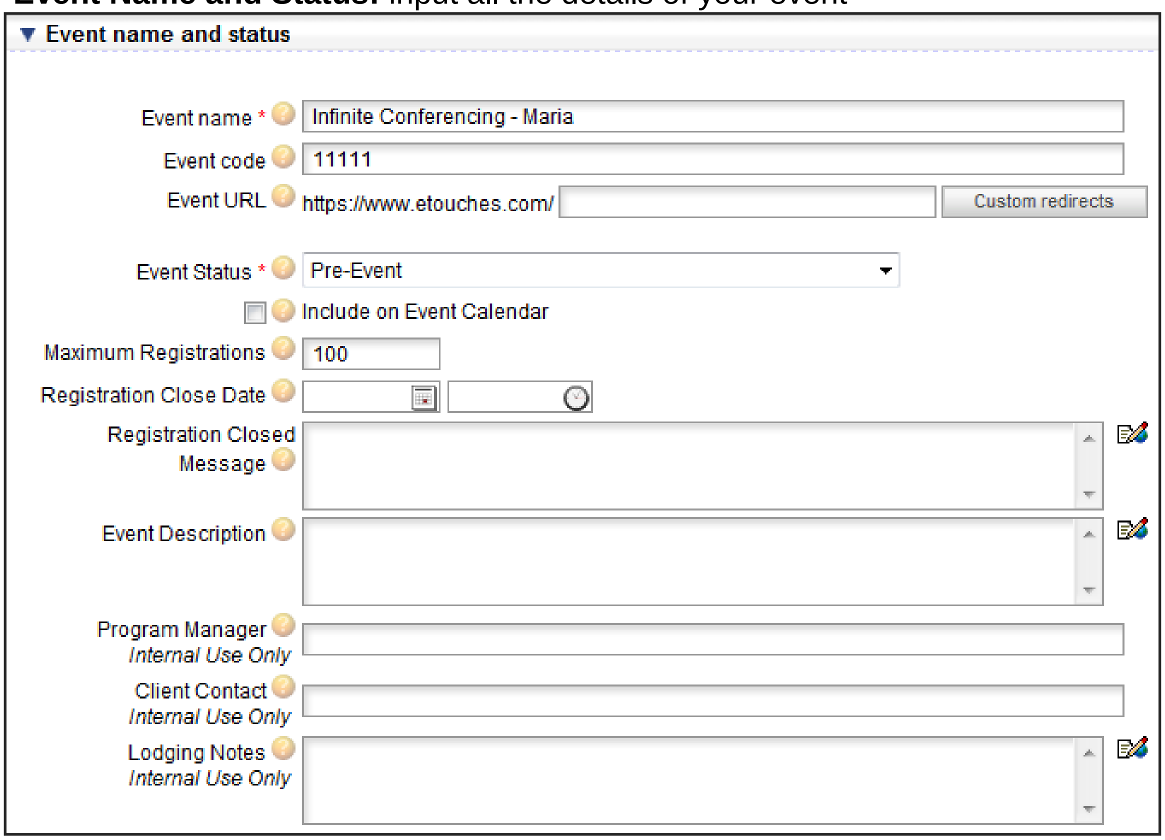
Event Info Tab

Event Info Tab: the Event Info tab consists of three sub-sections - Basic Details, Event Emails, and Registrant Rules. You can change between the three by clicking the links in the sub header section.

1. **Basic Details Tab:** this section has the basic details for your event, be sure this information is entered correctly because these details are often used throughout the registration process and other modules.

NOTE: * The asterisk next to a field label means that this field is required so you need to insert something in order for the system to allow you to save it and continue.

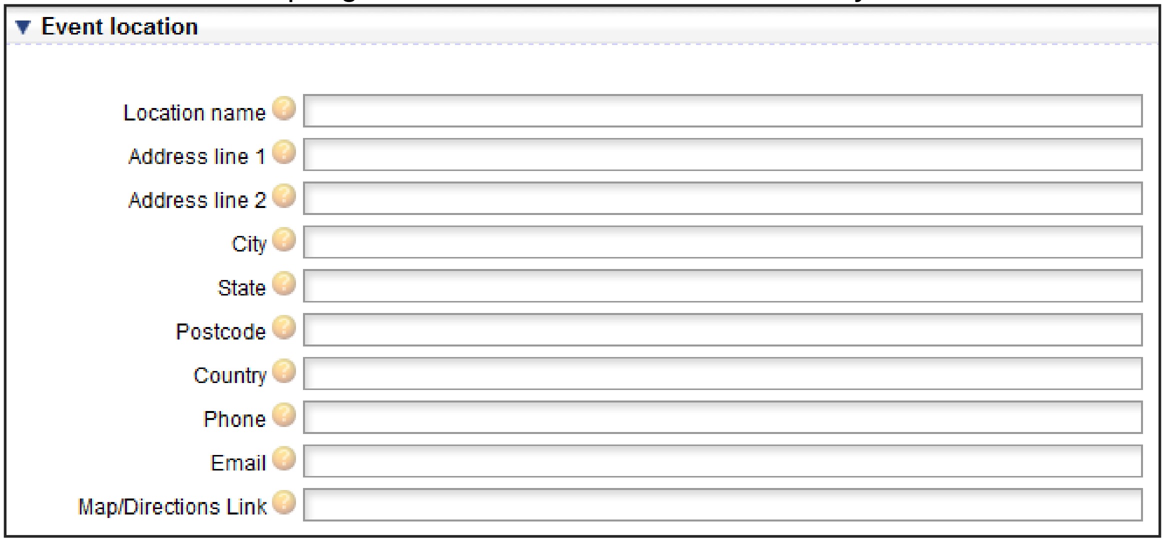
-Event Name and Status: input all the details of your event



- ***Event Name:*** enter the name of your event; this is the name that will be used throughout the database to identify your event.
- ***Event Code:*** a reference code can be assigned to your event which is used for internal purposes only.

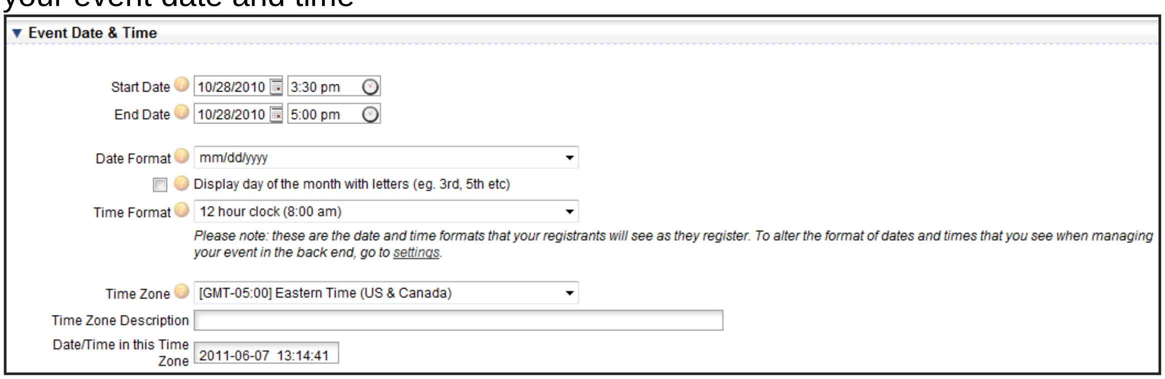
- ***Event URL:*** by default your event will have a URL that consists of the event number at the end. But you can assign a more relevant URL to your event by typing an ending into the text box. This will be your new URL.
- ***Account:*** the account name shown in the dropdown box is the account in which the event is placed, and determines who has access to the event.
- ***Event Status:*** your event status is displayed in the dropdown box. Until you are ready to make your event live you should always keep your event in “Pre-Event” status. When in pre-event, any registrants are marked as a test and payments are sent to a test payment gateway. The “Live” setting will make your event take live registrations. “On-site” will close the event to public registrants and give you additional on-site functionality on the back-end. Sold-out, Cancelled, and Archived will all close the site to additional public registrations.
- ***Include on Event Calendar:*** check this box if you want this event appear on your event calendar.
- ***Maximum Registrations:*** if you input a number in this field, once that many people register, the event will automatically close to new registrants.
- ***Registration Closed Date:*** if a date is entered here then the event will automatically close to new registrants once the specified date passes.
- ***Registration Closed Message:*** if you entered a registration closed date, you can create a message that will appear on the welcome page informing new registrants why the event is no longer available.
- ***Event Description:*** if you enter a description about your event it will appear when an attendee saves the date to their outlook calendar.
- ***Program Manager:*** enter the name of the person who manages the event. This is for internal use only.
- ***Client Contact:*** if you are managing this event for an external client, enter the name of the contact person with the client here. This field is for internal use only.
- ***Lodging Notes:*** any information entered here can be used to keep the lodging management informed. These notes will be placed at the top of the hotel report.

-Event Location: input general details about the location of your event



- ***Address line 1 & 2:*** address at which your event takes place.
- ***City:*** enter the city at which your event takes place.
- ***State:*** state in which your event is being held.
- ***Postcode:*** zip code for the location of your event.
- ***Country:*** country where your event is being held.
- ***Phone:*** this is a phone number linked to the location of the event.
- ***Email:*** this is an email address linked to the location of the event.
- ***Map/Directions Link:*** this field allows you to enter a link to a map showing where the event will be taking place.

-Event Date & Time: in this section you can adjust the settings associated with your event date and time

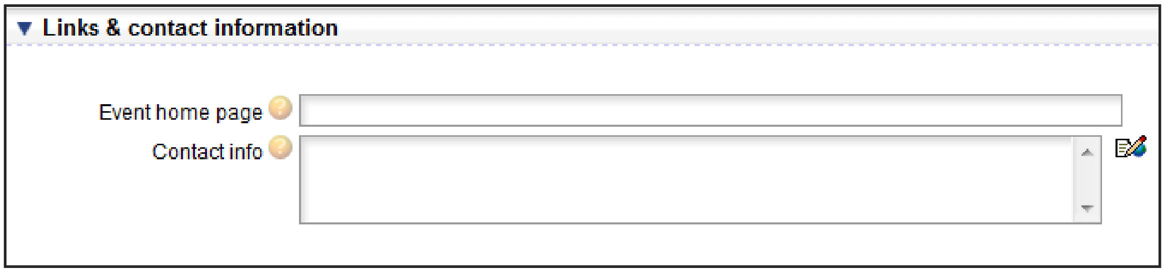


- ***Start Date &Time:*** date that your event starts.
- ***End Date & Time:*** date that your event ends.
- ***Date Format:*** select your preferred date format using the radio buttons.
- ***Time Format:*** select your preferred time format using the radio buttons.
- ***Time Zone:*** select a time zone for your event from the dropdown box.
- ***Time Zone Description:*** once you have selected a time zone, you can input a brief description about the time zone in the given section.

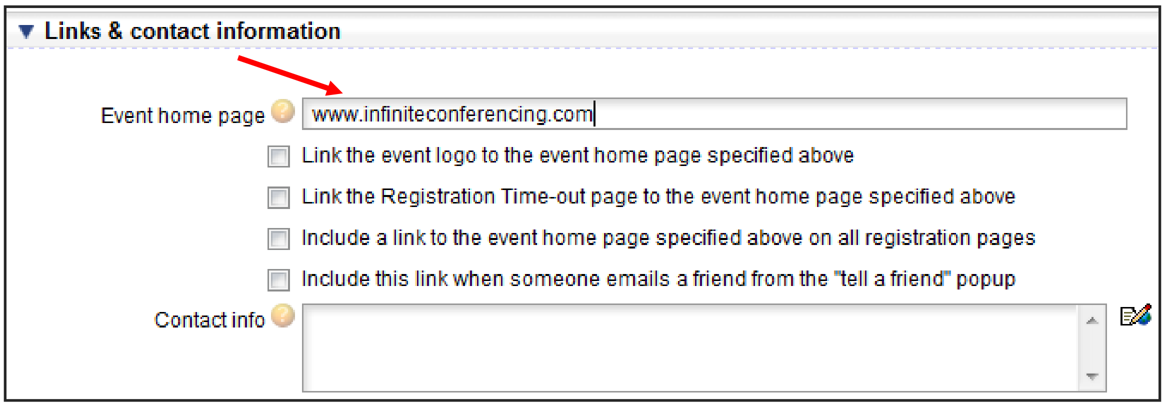
- ***Date/Time in this Time Zone:*** the time and date for the time zone selected is displayed in this box. When you change the time zone, the time will change.

-Links & Contact Information:

a. Without URL link



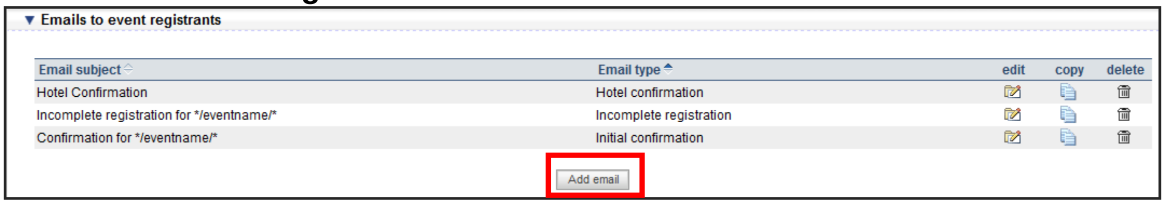
b. With URL link



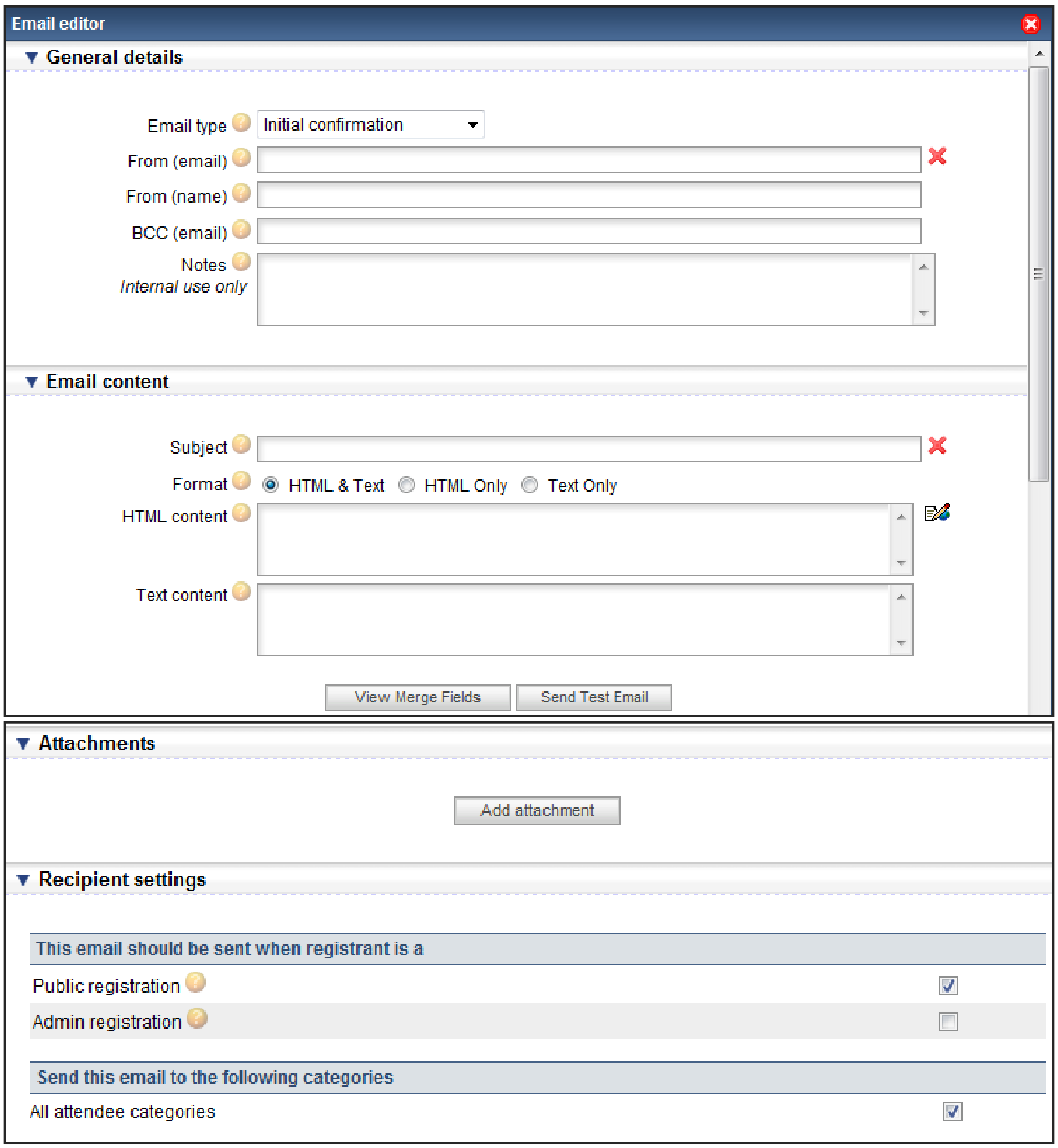
- ***Event Home Page***: if you have a home page for your event and would like to include it on the site, input the URL here. Once you input something, four checkboxes will appear with additional options. Check the ones that you want to apply to your event.
- ***Contact Information***: enter any contact information for people who can help attendees with questions regarding registration.

2. Event Emails Tab: Emails are usually sent out for incomplete registrations, initial confirmations for registrations, and hotel confirmations, but you can create as many custom emails as you need. In your emails you will want to provide the name of the email sender and the email address that the email is coming from.

-Emails to Event Registrants:



- ***Adding an Email:*** to add an email click the “Add email” button, this will populate a new window that looks like the screenshot below. There you can enter all the email information.



-**General Details:**

- ***Email Type:*** there are 6 types of emails to choose from, the following are:
  - ***a.*** ***Incomplete Registration:*** this email type is automatically sent to a registrant when they do not complete their registration. Its purpose is normally to ensure the person realizes that their registration was not finalized, and gives them a link to the event site so they can try again.
  - ***b.*** ***Initial Confirmation:*** this email type is automatically sent when a registrant first registers for your event. It will normally thank them for their registration and provide them with a link back to their registration record where they can see the details of their registration.
  - ***c.*** ***Hotel Confirmation:*** this email type is not sent out automatically by the system – an administrator will need to trigger it from a registrant's record when applicable. It's normally used when you are managing the room block internally.
  - ***d.*** ***Registration Cancellation:*** this email type is another that is not sent automatically. When a registration is cancelled the person managing the event can quickly trigger this email from a registrant's record.
  - ***e.*** ***Hotel Cancellation:*** this email type is similar to the registration cancellation, but it is intended for when a registrant just cancels their hotel rather than their registration for the event itself. It is not sent automatically by the system.
  - ***f.*** ***Custom Email:*** this email type can be used for whatever purpose you desire. Once you've selected this type you'll be given an opportunity to enter a name to identify the email, and you can then send it to your registrants from their attendee records.
- ***From (Email):*** enter the email address of the person you want the email to come from, note that people may reply directly to this email.
- ***From (Name):*** enter the name of the person that you want to email to come from.
- ***BCC (Email):*** enter the email address of anyone you want included on the bcc line. Multiple email addresses can be entered here but should be separated by semi-colons.
- ***Notes:*** these notes are for internal purposes, to help you and your colleagues identify the email.

-Email Content:

- ***Subject:*** information entered here will be used as the subject line for your email, be sure to make the subject obvious so the recipient does not delete it.
- ***Format:*** use the radio buttons to select the format of your email. The different formats are listed below:
  - a. ***HTML:*** this format allows you to bold your text, insert images, and make your email livelier. HTML emails are also more likely to be blocked by spam filters and not everyone can view it.
  - b. ***Text:*** the text format is more functional but cannot have any formatting, only new lines.

c. ***HTML & Text:*** with this format you can send both a text and HTML email out.

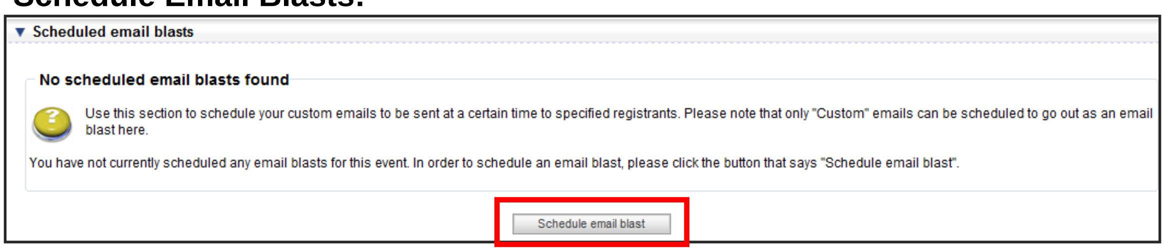
- ***HTML Content:*** use this HTML editor to add information to your email. To open the HTML editor click the icon to the right.
- ***Text Content:*** if you selected "Text Only", or "HTML & Text" as a format, you will see a text content field where you should enter the information that will be displayed for the users who cannot view HTML emails
- ***View Merge Fields:*** click the "View Merge Fields" button to view a list of the merge fields that you may want to use for your text content box. Merge fields can be added to the HTML content using the HTML editor.
- ***Send Test Email:*** it is strongly encouraged that you send yourself a test email to be sure everything is displaying the way you want. To do this click the button labeled "Send Test Email." A screen will then populate that allows you to choose which email address to send your test email to and also choose a registrants information to be sure merge fields are working correctly.

-Attachments:

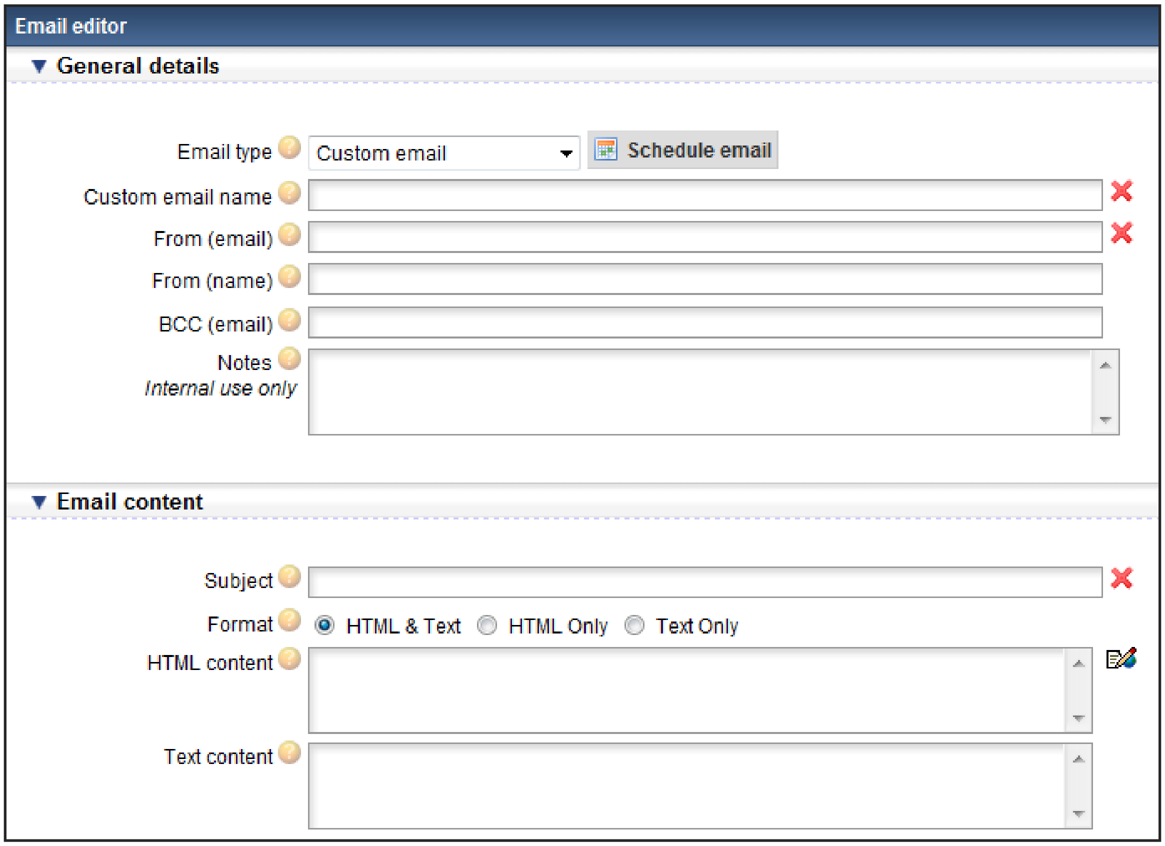
- **Attachments:** you have the ability to add attachment to your email using the tool in this section. The attachments that are available are ones that have been uploaded in your accounts attachment database. To add an attachment highlight it by clicking it, and select the add arrow. Every attachment on the right side of the table will be attached to your email. For more information on uploading attachments see the "New Interface Guide".

-Recipient Settings: in the recipient settings section you can specify specific categories that the email will be sent out to by checking the boxes as well as whether the email should be sent for public and/or admin registrations.

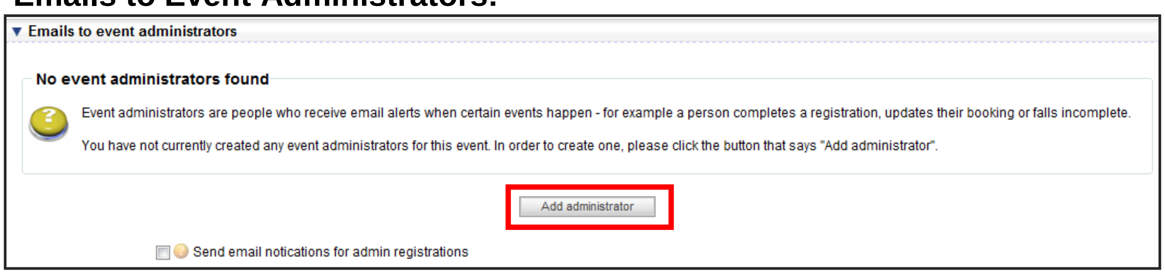
-Schedule Email Blasts:



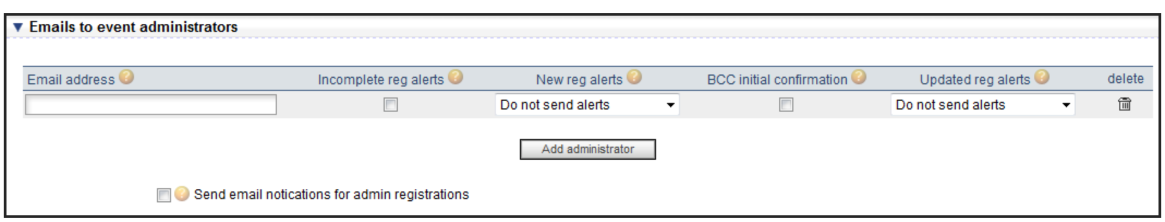
- ***Schedule an Email Blast:*** use this section to schedule your custom emails to be sent at a certain time to specified registrants. Please note that only Custom emails can be scheduled to go out as an email blast here. In order to schedule an email blast, please click the button that says "Schedule email blast".



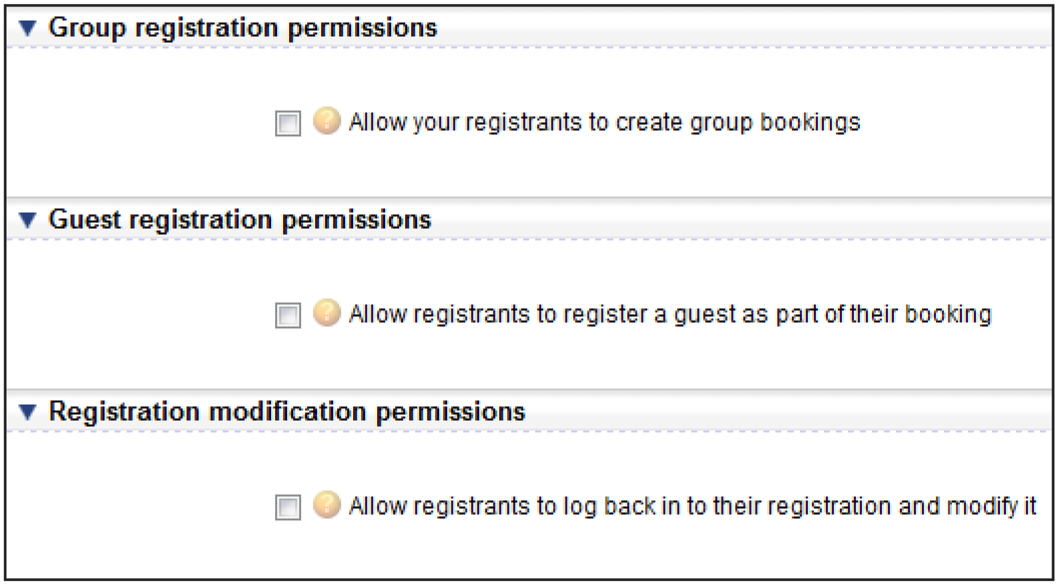
-Emails to Event Administrators:



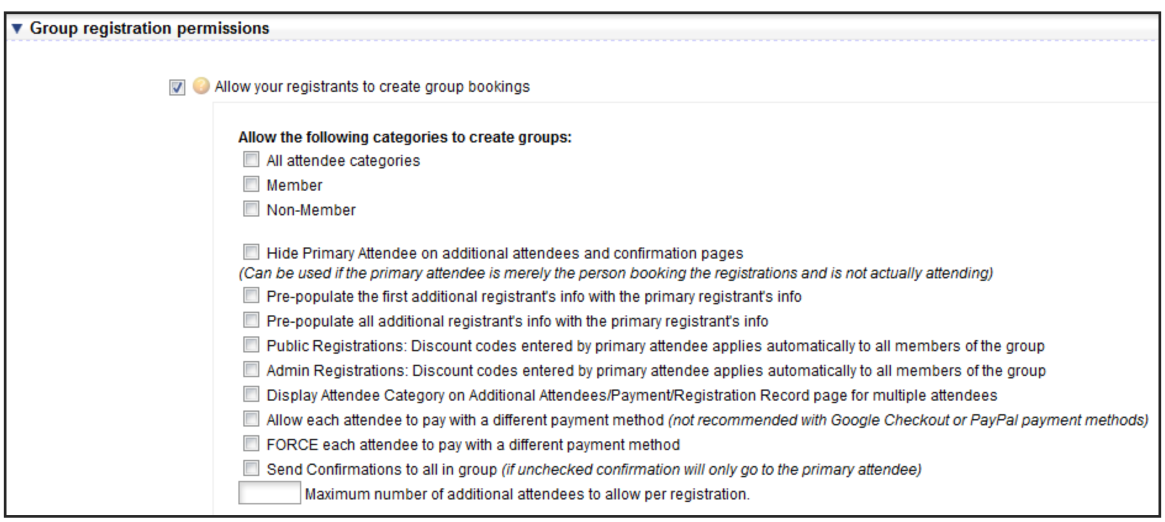
- ***Add Administrator:*** event administrators are people who receive email alerts when certain events happen - for example a person completes a registration, updates their booking or falls incomplete. In order to create one, please click the button that says "Add administrator" and fields like the ones below will appear.



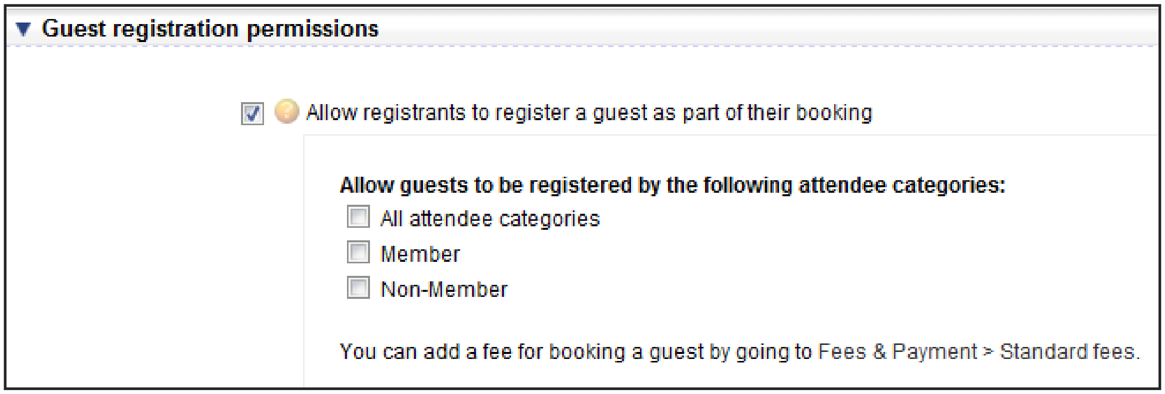
3. **Registrant Rules Tab:** this is the section that you would use to set up different type of registrant rules such as permitting group registration, guest registrations, and modifying existing registrations.



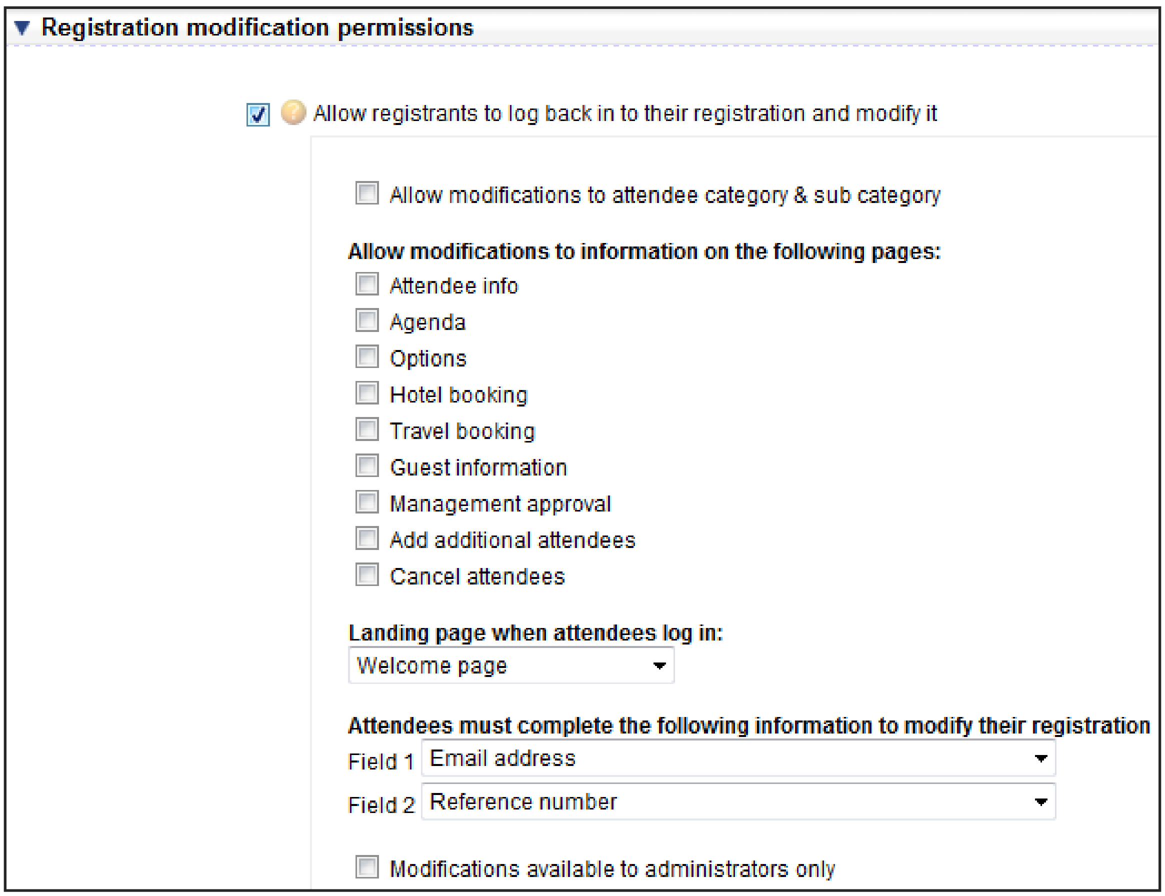
-Group Registration Permissions: allow registrants to register multiple registrants within the same group. This allows certain information to be copied between registrants avoiding unnecessary data entry, and can allow your registrants to pay as a group.



-Guest Registration Permissions: allow registrants to bring a spouse or partner to the event, and optionally charge an additional fee for them to do so.

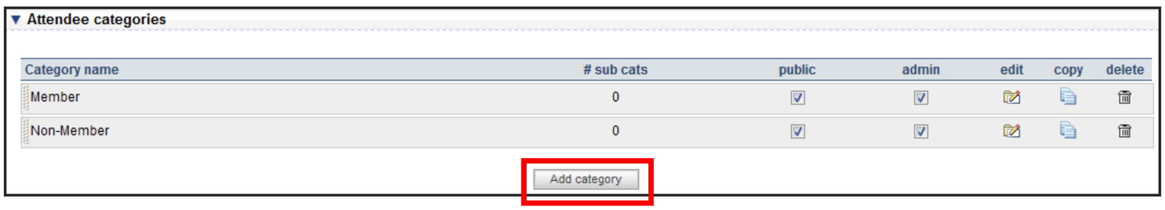


-Registration Modification Permissions: allow registrants to return to your site at a later date and change their registration details.



Categories Tab

Categories Tab: use categories to customize registration experience for different types of registrants. Categories are used to divide the registrants in your event. For example, common categories are; sponsor, speaker, member, and non member.

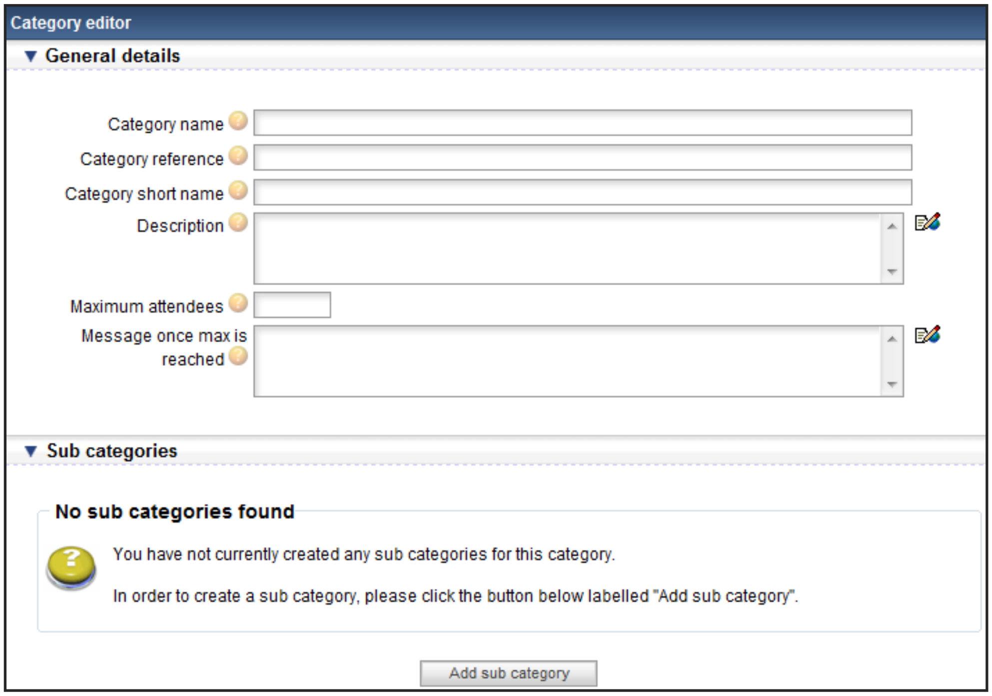


-Add Category: to add a category select the "Add Category" button, doing so will populate a new window. This new page will ask you questions in four different categories.

-General Details: in the general details you will need to enter the name, description, maximum attendees, and message one the max is reached of the category.

- ***Category Name:*** enter the name of your category here, this is the same name that will be displayed on the live site. Category names are often something like; "Sponsor, Speaker, Attendee, etc."
- ***Category Reference:*** enter a reference number for this category here.
- ***Category Short Name:*** if your official category name is long, you can enter a short name for it here which will be used in reporting. A good short name could be an abbreviation or simple word that you will understand for reporting purposes.
- ***Description:*** enter a brief description about your category here. By default this description will appear in a "More Info" link next to the category name, but can be changed in advanced settings explained below.
- ***Maximum Attendees:*** if you have a maximum amount of attendees that can register for this specific category then you can enter that number here and when the number is reached the attendee will see the message of your choice.
- ***Message once max is reached:*** if you set a maximum amount of attendees then when that number is reached, the message inputted here is the message the attendees will see.

-Sub Categories: a sub-category is another secondary option that a registrant has to pick after selecting a certain category. When you click "Add Sub-Category" a window will populate.



-Visibility Settings: in this section you can choose whether or not a category will be visible to public or admin users.

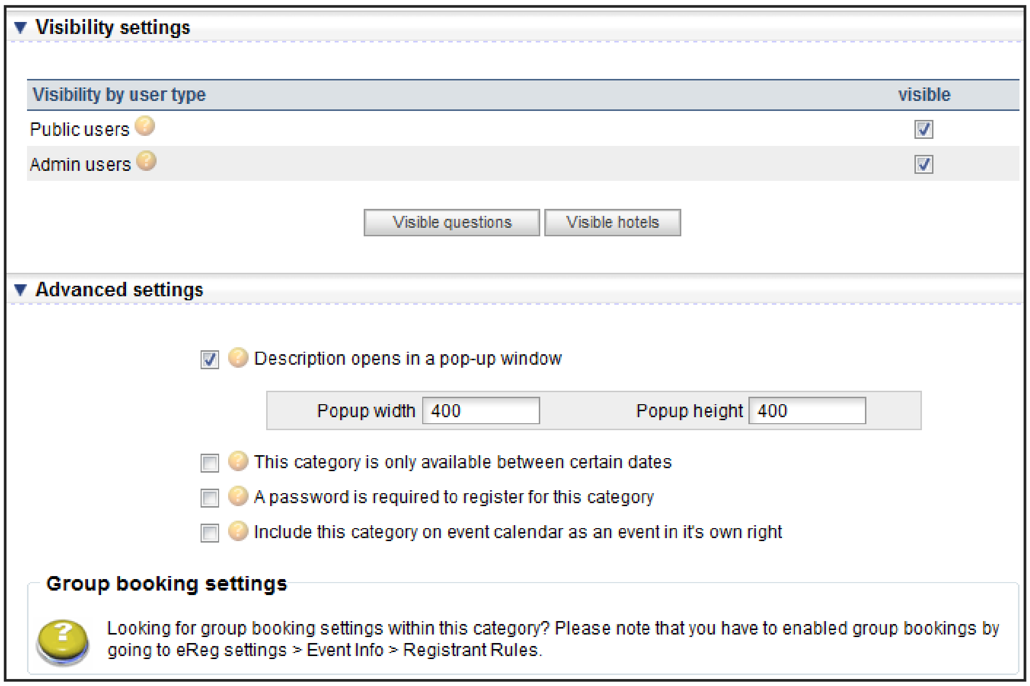
- ***Public Users:*** check this box if your public registrants can select this category.
- ***Admin Users:*** check this box if people registering people using the "Admin Registration" can select this category.

-Advanced Settings: in this section you can change advanced settings and preferences for your category

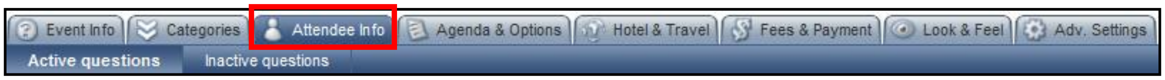
1. ***Description opens in a pop up window:*** if you want the category's description to open up in a pop up window instead of under the category name
    a. ***Popup Width:*** if you checked the box to have your description open in a popup window then you will be able to edit your pop up width here
    b. ***Popup Height:*** change the number of pixels in this field to change the pop up height
2. **This category is only available between certain dates*:*** select this checkbox if this category should only be available for people registering between certain dates and times.

3. **A password is required to register for this category*:*** if this category requires a password then check this box. When checked you will see a button added to the right that says "View/Edit Passwords".
   a. ***View/Edit Passwords:*** you can add passwords in two different ways: by cutting and pasting data or importing from a CSV excel file. Once passwords have been entered, click "Save & Stay" to save the passwords.

- **Include this category on event calendar as an event in its own right:** Show this category as an event on the event calendar in its own right. People will be able to click on the event and be brought to your eReg site with the category already selected.

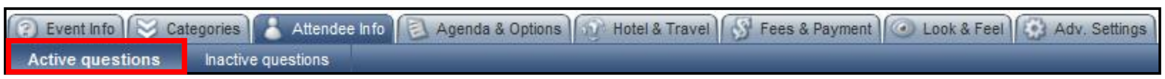


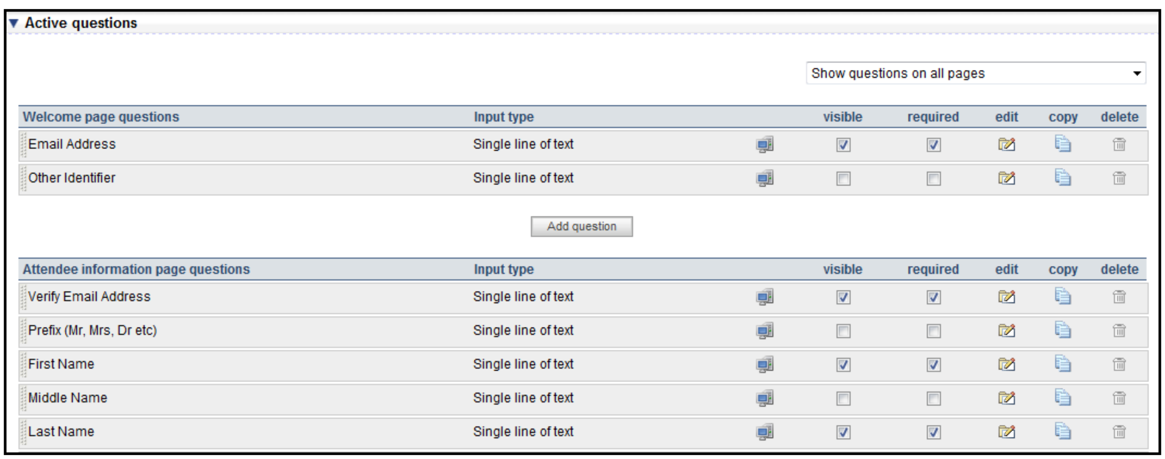
Attendee Info Tab



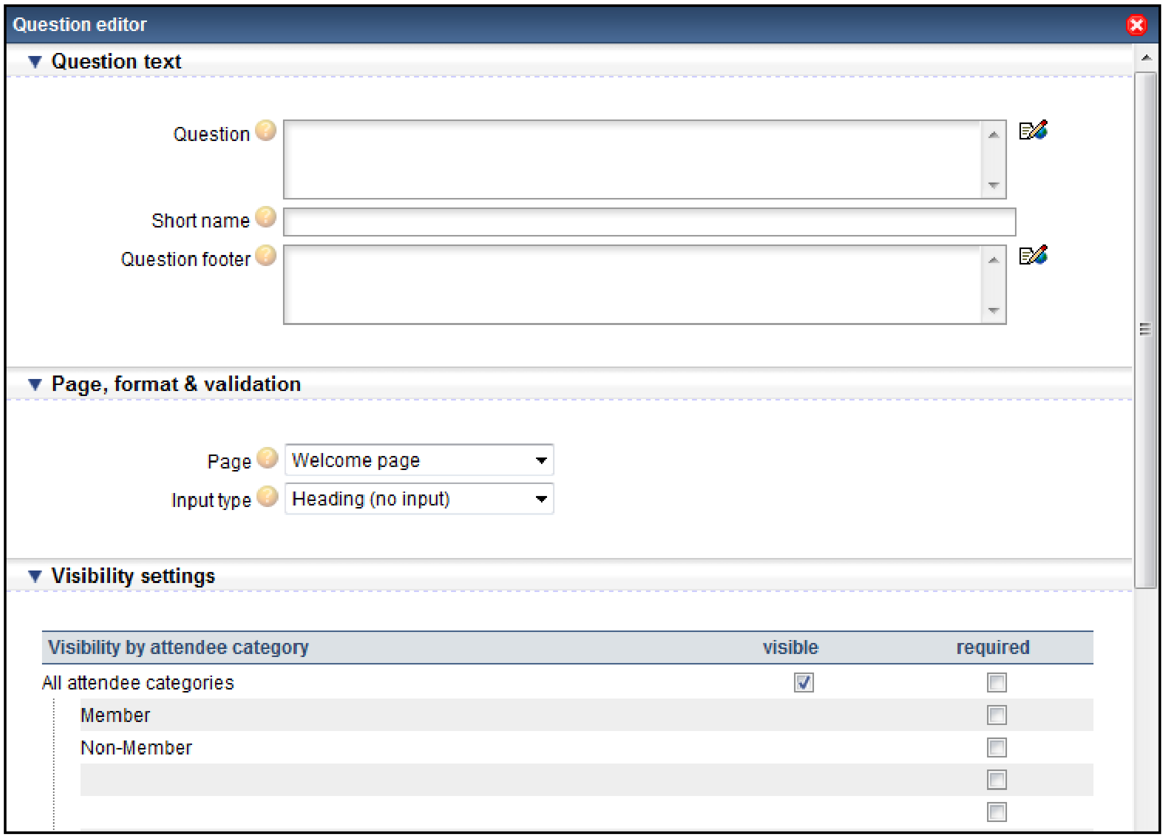
Attendee Info Tab: This section will ask the primary questions that you need to have answered by all or the majority of the registrants. The most common questions that are needed are already setup in the active questions. The questions on this page are divided up into sections based on the page the question is designated to appear on. These pages include Welcome, Attendee information, Select agenda, Options, Spouse/Partner Page, etc. The next tab are the inactive questions which is where the systems default questions go when you try to delete them because they cannot be deleted.

Active Questions Tab: active questions are questions that are ready to be added to your attendee information page.





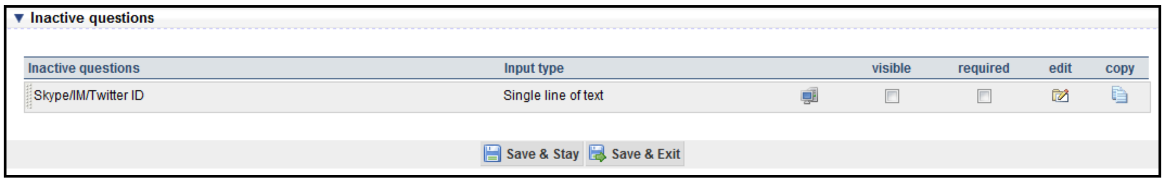
- **Welcome Page Questions:** any questions listed under this section will be displayed on the welcome page, the same page that the category selection is. By default, the email address question, and other identifier question are placed in this section. You can also add a question by clicking "Add question".
- **Attendee Information Page Questions:** to add a question click the "Add question" button under any of the page sections.
- **Add Question Button:** At this time you will have to enter in all the information for your question which is split into sections



a. ***Question:*** The first thing you have to do is input the question itself by either typing it into the box or adding style to it using the HTML editor logo to the right.
b. ***Short name:*** if you choose to enter in a short name for this question it will appear on the attendee record and on reports where space is limited
c. ***Question Footer:*** Question footers are used when you want to add information underneath the question such as instructions.
d. ***Page:*** in this dropdown box you will select which page you want your question to be visible on, depending on what you choose, this is where the question will be located on for editing on the active questions page.
e. ***Input Type:*** this is one of the most important parts of your question, choosing the attendees required input. Depending on the input type that you choose, more fields will populate under the dropdown box and for questions that require multiple options, a button to the right of the dropdown box will say "Specify Options." Some of the fields that will appear include: position text, attendee input, and to hide option names.
f. ***Visibility Settings:*** This section allows you to choose if you want your section to be visible either or both by attendee category or user type, so you can check off is you want it to be visible to specific categories that you have created, public users or to admin users.
g. **Advanced Settings:**
Display a record of the question & the response on the payment & confirmation pages: This setting allows you to specify whether or not an

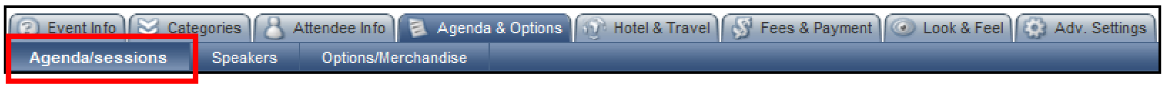
attendee's response to the question is displayed on the payment and confirmation pages. In general, you will probably want to display most fields to the attendee on these pages, but if you have a lot of questions and find that the page is getting too long, you may want to make some of these responses invisible.

Inactive Questions Tab: If you have an inactive question that you would like to make active again, you simply go to the question in the inactive section and then click the edit icon.

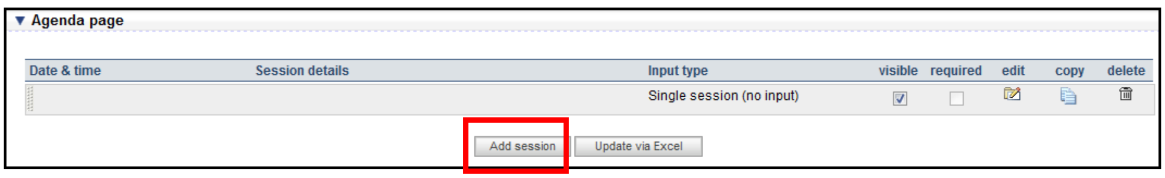


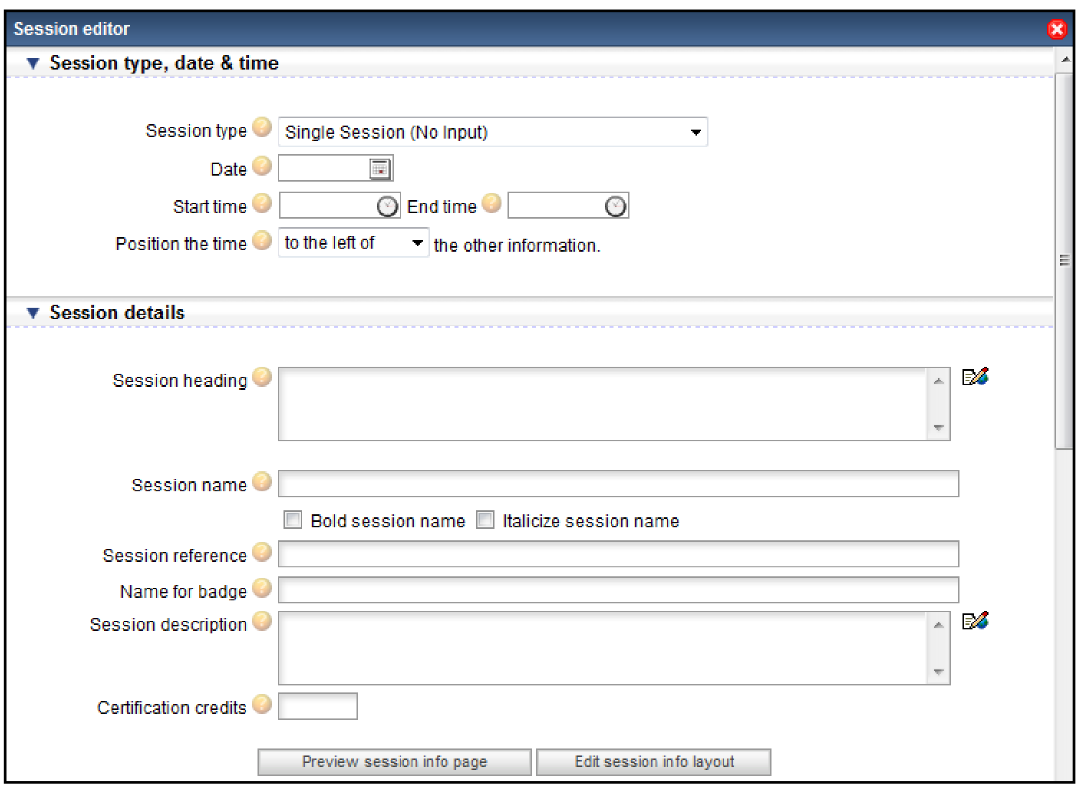
Agenda & Options Tab

Agenda & Options Tab: This is where you can set up your agenda, ask attendees to select which sessions they will attend, and ask attendees to specify anything else they want to purchase.



Agenda/sessions Tab: This section allows you to add sessions to your event that registrants can choose to attend. You can assign fees to these sessions on the Fees & Payment Screen. To add a session, click on "Add a session". Or you can upload your sessions by using a .CSV file.





Agenda Page: The agenda page section of the site allows you to add or edit the sessions you are offering your attendees during the course of the event

Session type, date & time:

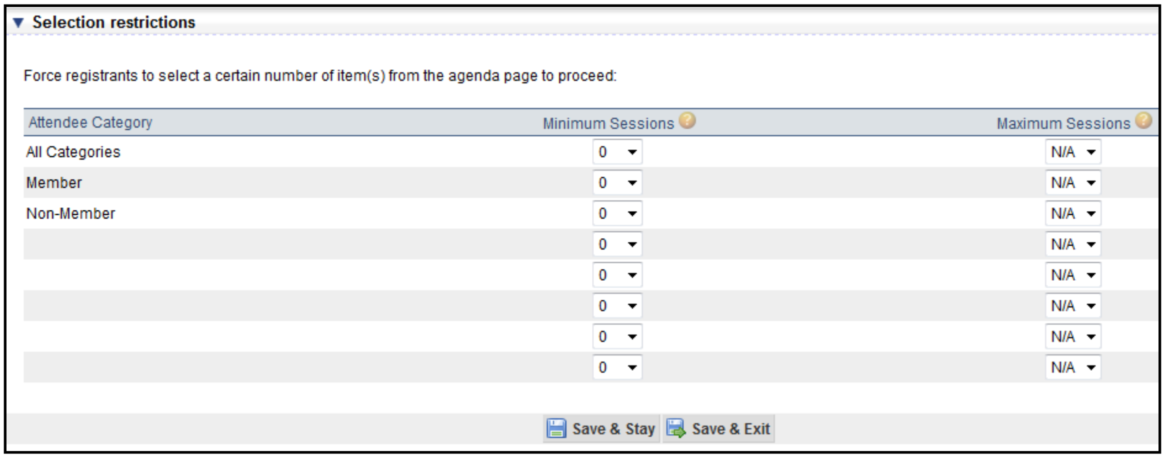
- ***Session Types:*** there are three types of sessions to choose from; Single Session (No Input), Single Session (Checkbox), or Multiple Sessions (Radio Buttons).
    a. ***Single Session (No Input)****:* a session header only displays the session heading. No options are available to select from. This is used mainly for notifications that do not allow registrants the option to choose to attend or not.
    b. ***Single Session (Checkbox)****:* use this option when you have a single session that you want your registrants to be able to choose whether or not to attend. The option will consist of a checkbox.
    c. ***Multiple Sessions (Radio Buttons)****:* this option is used when you want to give your registrants multiple options to choose from. These options will appear as radio buttons.
- ***Date:*** enter in the date that the session will take place in, be aware that sessions that are on the same day will all be grouped together on the registration site showing the attendee that a day has been changed.
- ***Start time & End time:*** using the dropdown boxes, select the start and end time of the session.
- ***Position the time:*** you have the option of where to position the time around the heading and other information.

Session Details:

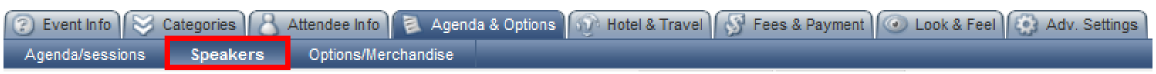
- ***Session Heading:*** optionally enter some text to appear above your session.
- ***Session Name:*** input the session name here.
- ***Session Reference:*** you can use this if you have a specific code you want to reference this session.
- ***Name for badge:*** this is the name that will appear on your badges, you would use this feature if the session name was too long to fit on a badge and you have a short name for it.
- ***Session Description:*** the session description will appear to your registrants either below the session or in a popup box depending upon your selection.
- ***Certification Credits:*** if you want your registrants to get some sort of credits for attending this session then you can enter the number of credits here.

Visibility Settings:

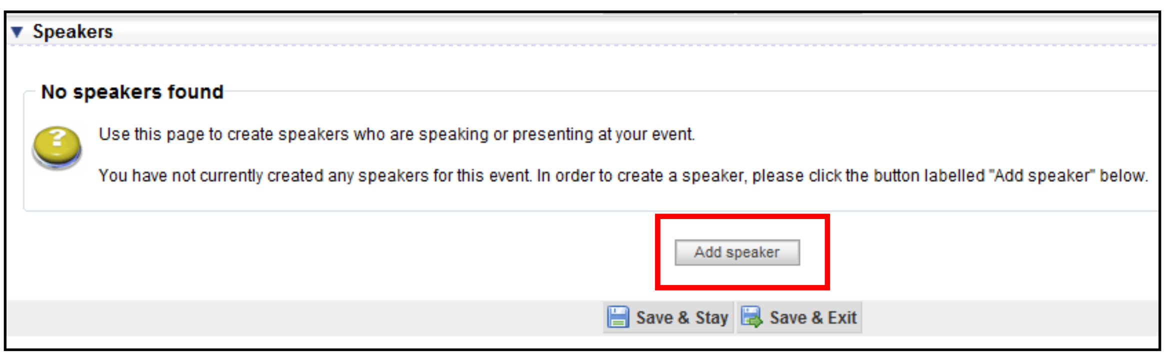
- ***Visible by Attendee Category:*** if you want your session to have different visibility settings for different categories then uncheck the top box and check certain boxes next to each category. If you want the option to be required then check the box in the required column.
- ***Visible by User Type:*** in this subsection you can make your session visible or invisible to public and/or admin users. Check the boxes to your liking.

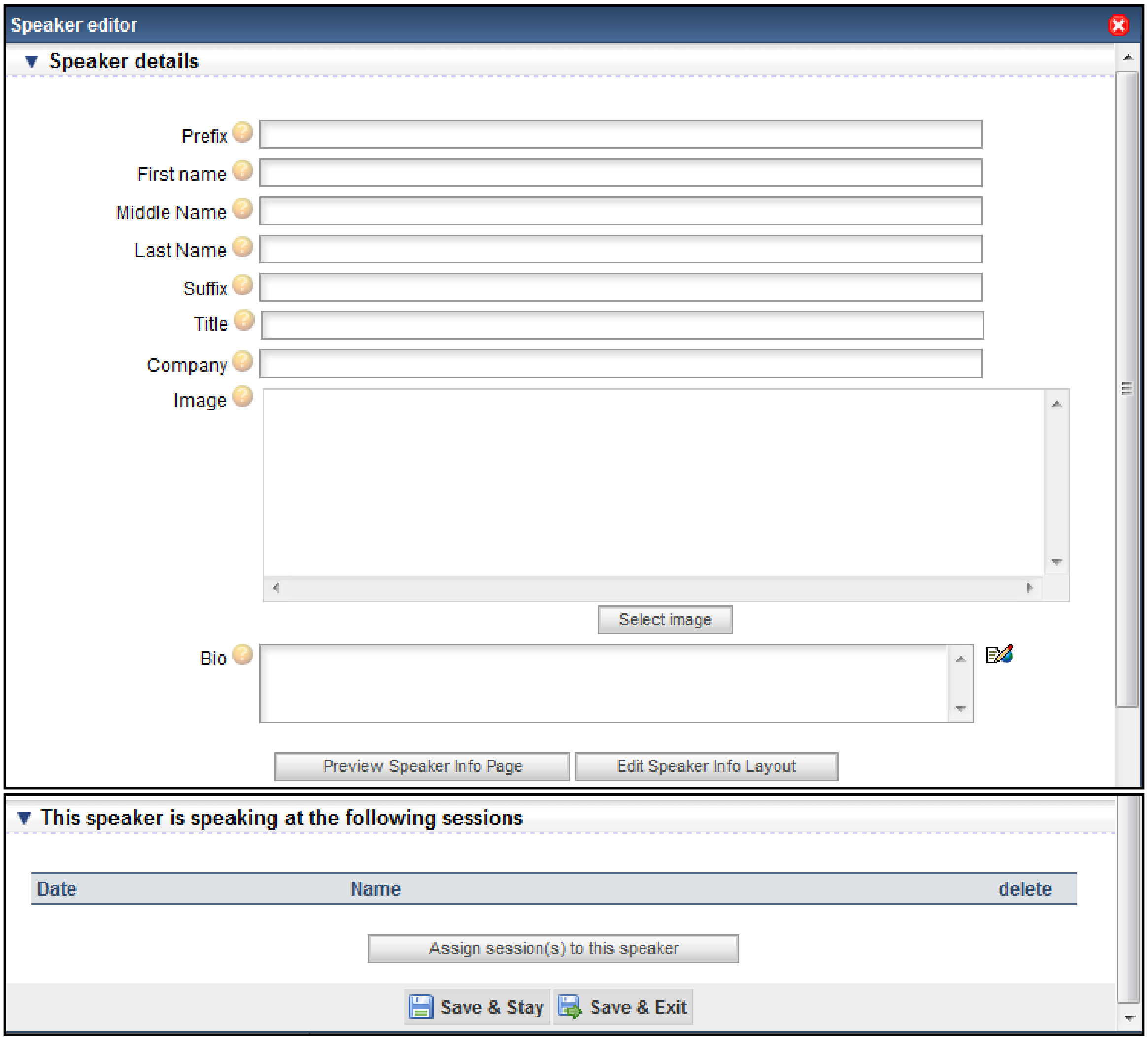


Selection Restrictions: If you scroll down to the bottom of the agenda page, you will see an option to make the registrant select a certain amount of options from the agenda page in order to continue. For example, this is helpful when you have a total of five different sessions that the registrant is allowed to choose to attend or not and you want the registrant to choose at least three of them. If none are required to be attended then you can select the number three from the dropdown box in this option.



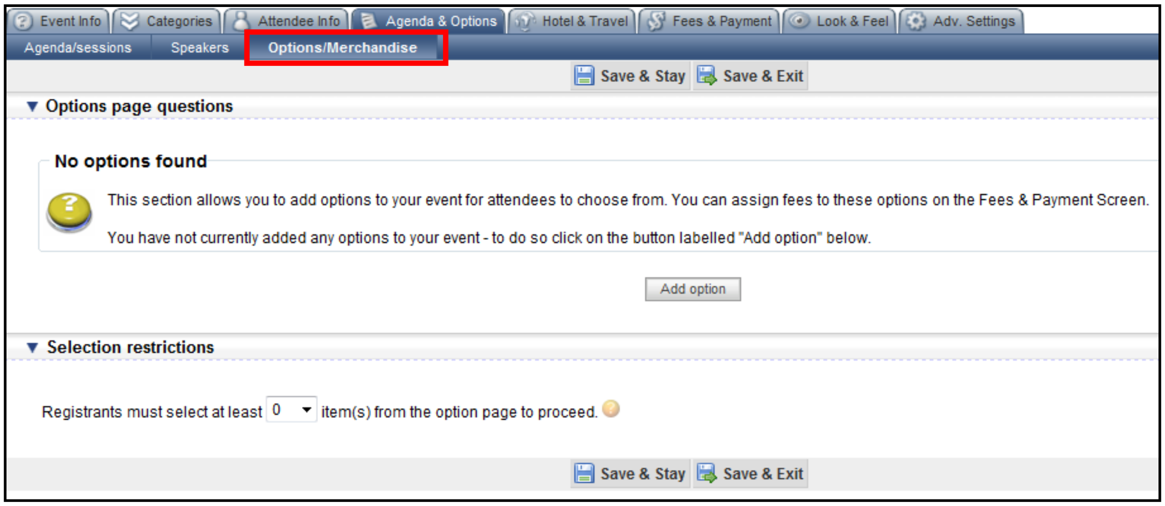
Speakers Tab: Use this tab to create speakers who are speaking or presenting at your event. Click on "Add Speaker" in order to create a speaker.





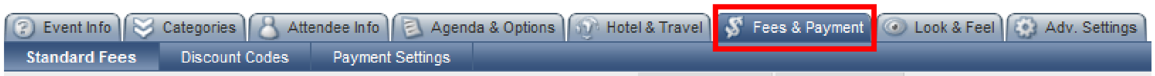
Speaker Details:

- ***Prefix:*** add the prefix of the speaker if applicable
- ***First Name:*** input the speaker's first name
- ***Last Name:*** input the speaker's last name
- ***Suffix:*** add the suffix of the speaker if applicable
- ***Title:*** enter the title of the speaker here
- ***Company:*** enter the company of the speaker here
- ***Image:*** upload an image of the speaker from the database
- ***Bio:*** use this field to input a bio of the speaker
- ***Assign Session(s) to this speaker:*** click this to assign a specific session to a speaker

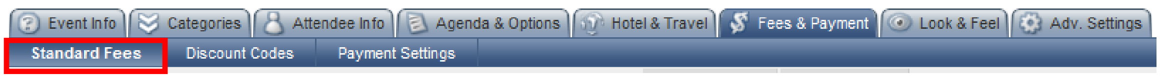


Options/Merchandise Tab:
Options Page Questions: this section allows you to add extra services to your event for attendees to choose from. Click on “Add Option” to insert an additional service.
Selection restriction: If you add a minimum number of options then registrants will receive an error if they try to proceed from the options page without having selected at least that number of items.

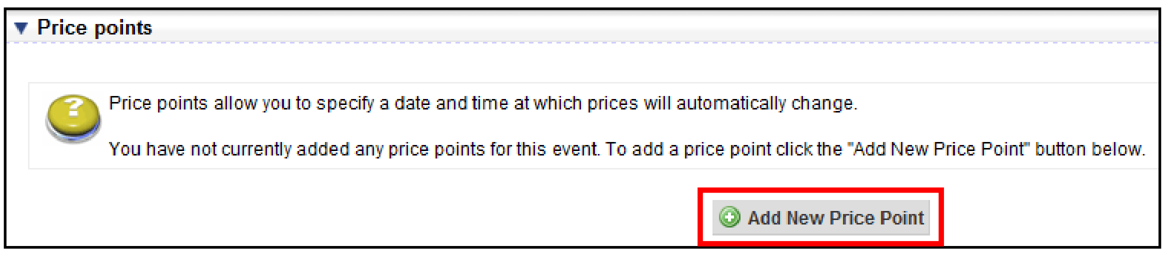
Fees and Payment Tab



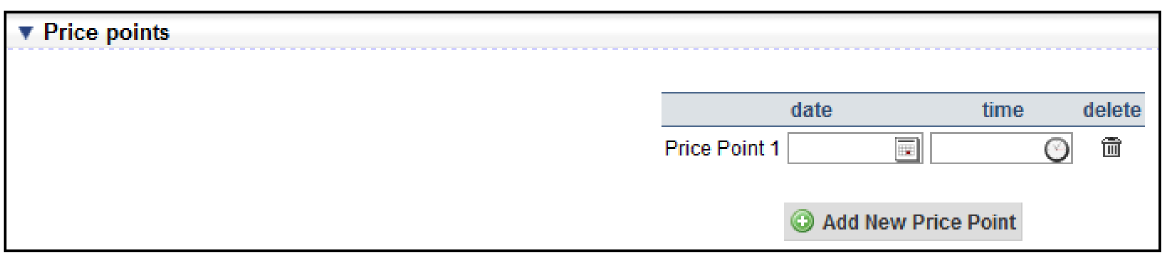
Fees and Payment Tab – The fees & payment tab consists of three different pages; Standard fees, Discount Codes, and Payment Settings. Below is a detailed explanation of Standard Fees.



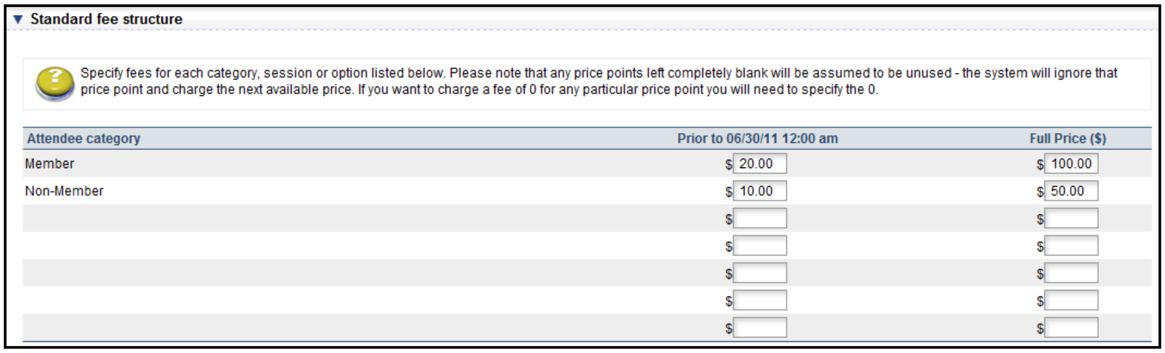
Standard Fees Tab - The standard fee page has two sections, price points and standard fee structure. The standard fee section is divided by category, session details, option details, and anything that can have a fee associated with it. Prices are separated into columns by price points.



Price Points: Price points allow you to charge a different amount depending on the date and time when a person registers. The reason you may want to enter a price point is if you have a cheaper registration fee for people who register by a certain date, instead of going into the system and changing the price manually, you can set up a price point to automatically change the price at any given time and date.

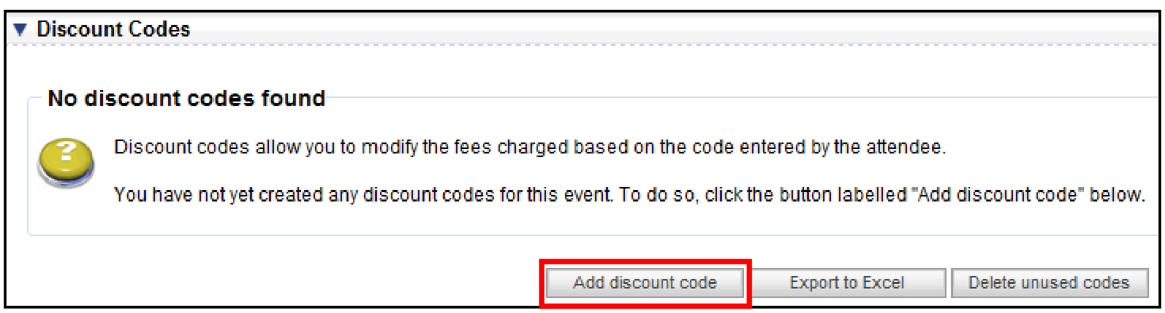


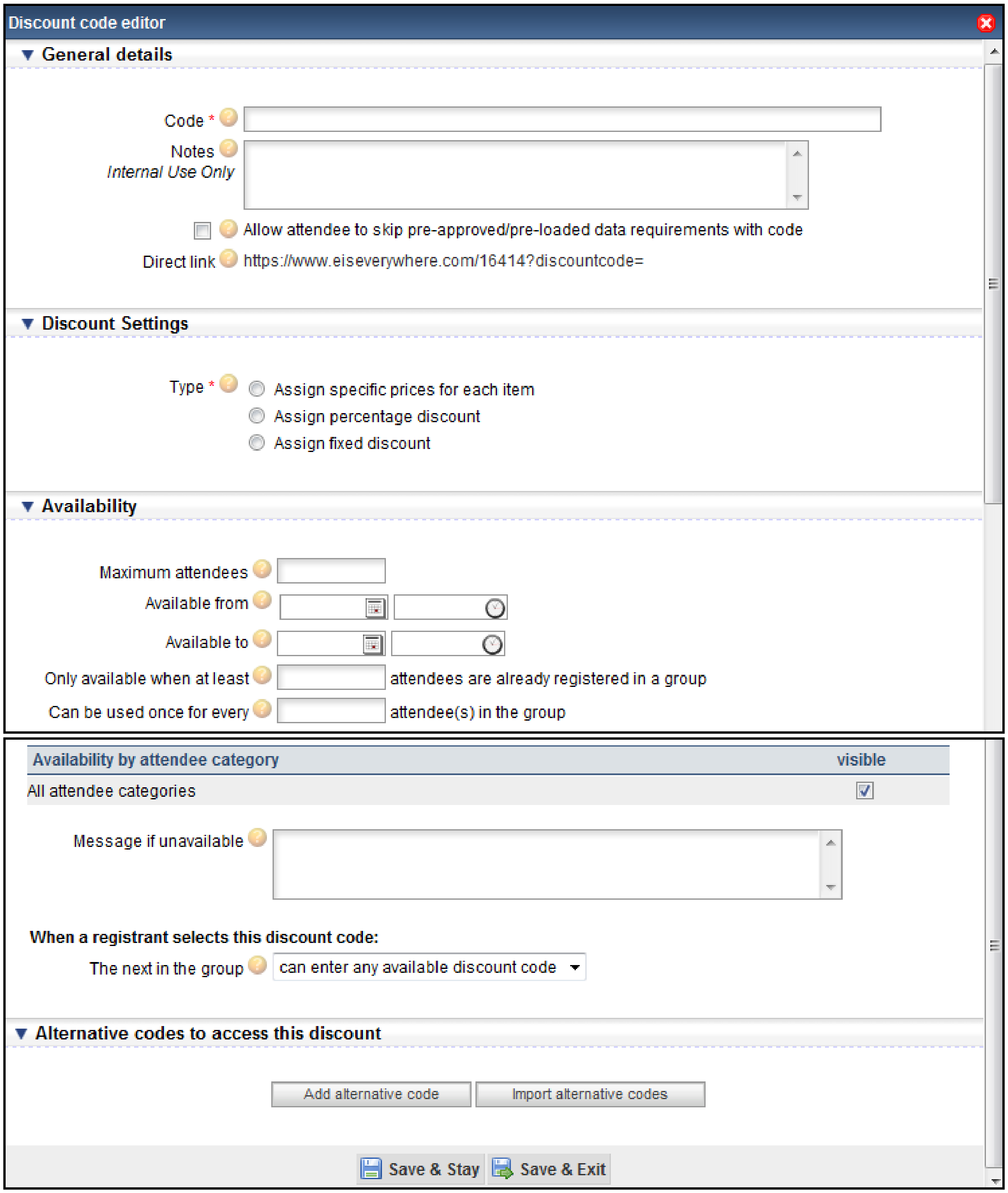
Adding a Price Point: to add a price point simply click the button labeled “Add New Price Point” under the current price points (if any). This will add a blank price point in the price point box. Once you have added the price point you can enter in the date and time you want it to end on. To delete a price point, click the delete icon directly to the right of the date and time.



Standard Fee Structure: Once you add and save a price point, the price point date is added as another column for prices in the "Standard Fee Structure." Please note that any price points left completely blank will be assumed to be unused, the system will ignore that price point and charge the next available price. If you want to charge a fee of $0 for any particular price point, you have to specify the $0.

Discount Codes Tab: The discount code page is where the discount codes associated with your event will be listed. A discount code is a code the registrant will enter during the beginning of their registration that will provide them with a certain discount. The layout of the discount code page is simple. The codes are listed and there are 5 (plus your standard edit/cop/delete icons) columns that display certain information. Click on "Add Discount Code" to get started.





General Details: In this section you have to input the name of your discount code as well as any notes that apply to it. You also have the option to allow an attendee to skip pre-loaded data requirements when the codes are used.

- ***Code:*** Enter the code that the registrant will have to use to get the discount. Please note that the registrant will have to enter in the code the same exact way it is typed in this box.

- ***Notes:*** These are notes associated with your code in case you have a code with similar names and want another way to identify them, you can enter in any notes here.
- ***Allow attendee to skip pre-approved/pre-loaded data requirements with code:*** This checkbox gives this discount code the ability to skip specific requirements that you've put in place, such as preventing people from registering with certain email addresses entered in the pre-approved data.

Discount Settings: In this section you have to choose the type of discount code you want to create. You can choose this type by selecting one of the three radio buttons.

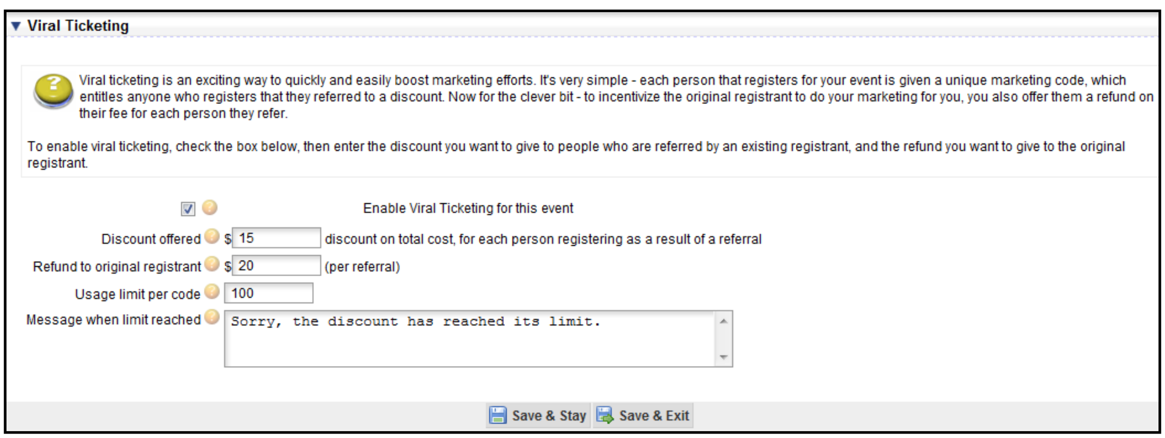
- ***Type**:* For the discount code type you have three options - assign a specific price for each item, assign percentage discount, and assign fixed discount.
    a. **Assign specific prices for each item:** specific prices allow you to specify exactly what you want to charge for any chargeable item in your event. You can reduce the cost of any one item and leave the prices of other items untouched. This process may take a long time if you have a lot of items with prices that the discount code can be used for but it is very specific. Once you choose this option, a list of everything in your event that has a price will be listed.
    b. **Assign percentage discount:** percentage discounts allow you to automatically discount prices by a set percentage. Percentage discounts are much quicker to add, but they do not allow you too much flexibility as specific prices. For example, if you add a 20% discount, then every item in your event will be discounted by 20% when a registrant uses it. If you are using a percentage discount you will see a place to assign the percentage you want to use under the "Discount Settings" tab. You also have the ability to give some guidance on which specific pricing areas you want to discount. You can apply the percentage discount to categories and sub categories, to session (agenda selections), and to options.
    c. **Assign fixed discount:** fixed discounts allow you to automatically discount prices by a set amount. Fixed discounts work in a similar way to the percentage discounts, but rather than taking a percentage from every fee in your event they will subtract a fixed currency amount. If you are using a fixed discount you will see a place to assign the currency amount you want to use under the "Discount Settings" tab. You also have the ability to give some guidance on which specific pricing areas you want to discount. You can apply the fixed discount to categories and sub categories, to sessions (agenda selections), and to options.

Availability: If you do not want usage of your discount code to continue indefinitely, this section provides you with several ways to limit who can use the code, when they can use it, and in what circumstances.

- ***Maximum Attendees:*** Use the maximum attendees box to specify the maximum number of attendees that can use your discount code. Once that number of people have used it then it will no longer be available to new registrants.
- ***Available From/To:*** This field allows you to choose the specific dates that you want the discount to be available from and how long. Select the full date that the discount code is available from and to.
- ***Only Available when at least:*** In this field you can choose the option to have the discount code only to work when a certain amount of attendees are already registered in the group. For example, if you wanted the discount code to be available after 5 attendees are already registered then you can put 5 into the field.
- ***Can be used once for every:*** In this field you can choose the option to have the discount code only be available for a selected person based on the order in which the attendees register. For example, to have the discount code be available to every fourth person, you can input 4 into the field.

Availability by attendee category: This checkbox represents who will be able to use the discount code. If you want every category to be able to use this code then check the top box, if not, uncheck the box and select the specific categories manually.

Alternative codes to access this discount: You can add or import alternative codes that registrants will be allowed to use.

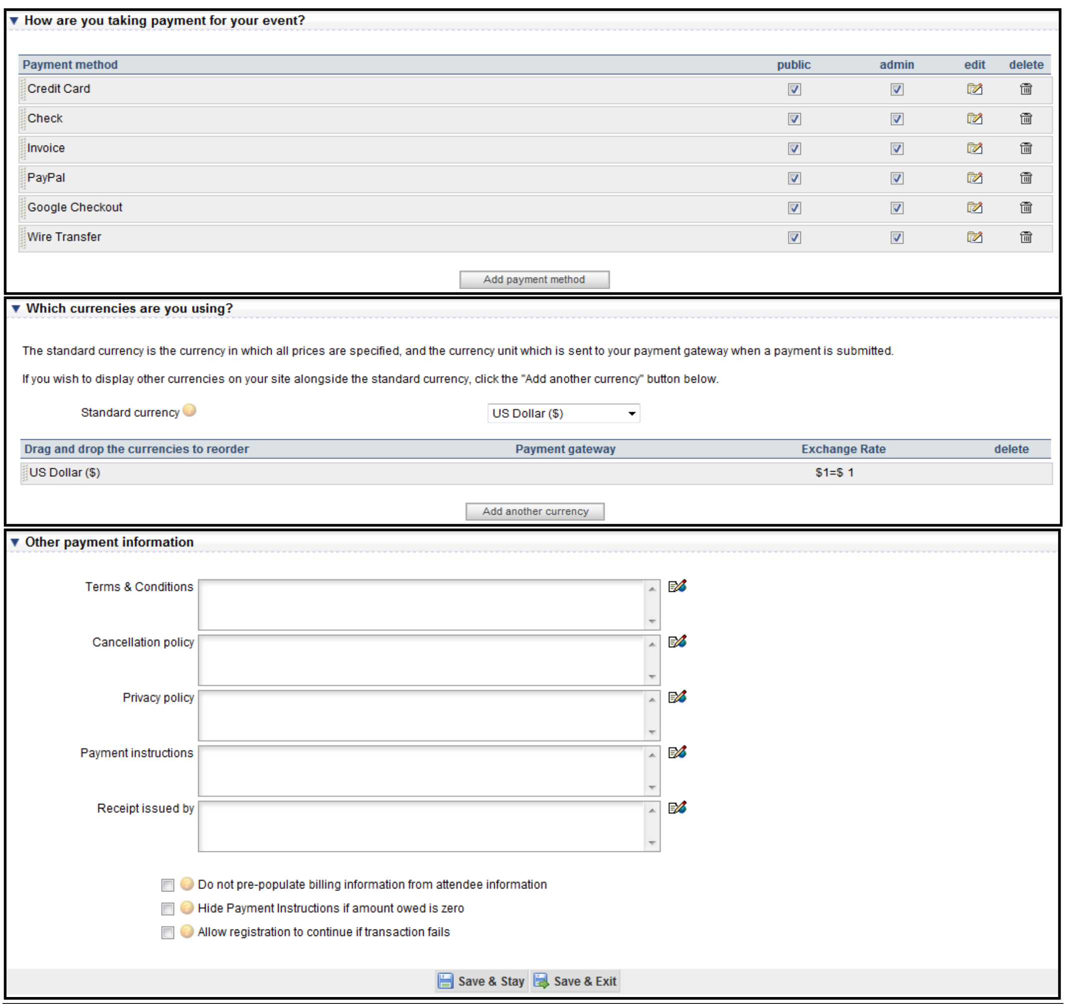


Viral Ticketing: it is an exciting way to quickly and easily boost marketing efforts. Each person that registers for your event is given a unique marketing code, which if they share then their friend can receive a discount. To incentivize the original registrant to do your marketing, then you also offer them a refund on their fee for each person they refer.

- ***Enable viral ticketing for this event:*** check the box as shown in the screen shot above to enable Viral Ticketing.
- ***Discount offered:*** enter the discount you would like to give to people who are referred by an existing registrant.

- ***Refund to Original Registrant:*** enter the refund you want to give to the original registrant here.
- ***Usage limit per code:*** specify the maximum number of times that each viral discount code can be used.
- ***Message when limit reached:*** specify the error message that will popup when the limit is reached.

Payment Settings Tab: The payment settings page allows you to edit the currencies used by your event and the ways in which your registrants can pay for your event. You can also specify other payment related text such as your terms and conditions or your cancellation policy. The payment settings page consists of three sections: Payment Methods, Currencies and Other Payment Information. These three sections are described in detail below.

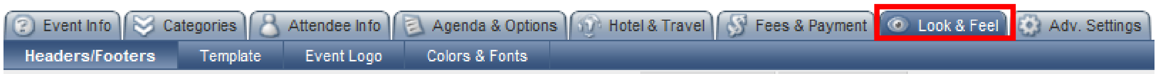


- **How are you taking payment for your event?:** There are different payment methods you can choose from such as pay on door, credit card, check, invoice, PayPal, Google checkout, wire transfer, and/or Paypal Express checkout. Depending on the payment method you choose, you can select your settings.
- **Which currencies are you using?:** You can use the currency section to dictate the currencies displayed by your event when the registrant has to pay. The standard currency is the currency in which all prices are specified, and the currency unit which is sent to your payment gateway when a payment is submitted. There are 28 pre-loaded currencies to choose from.

Other payment information: section of the payment settings page is where you enter in the regulations or important information about the payment.

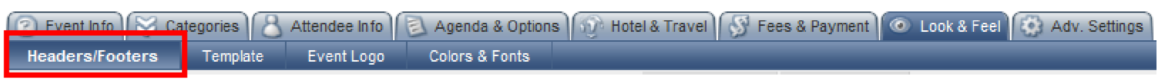
- ***Terms & Conditions:*** any terms and/or conditions that apply to your payment settings should be entered here. You can use the HTML editor to format the text.
- ***Cancellation Policy***: input any information about a cancellation policy here, you can use the HTML editor to format the text.
- ***Privacy Policy:*** input any information regarding the privacy policy here, you can use the HTML editor to format the text.
- ***Payment Instructions:*** input payment instructions in this field, you can use the HTML editor to format the text.
- ***Receipt Issued By:*** input the receipt issued by text here, you can use the HTML editor to format the text.
- ***Do not pre-populate billing information from attendee information:*** *use this checkbox* if you would prefer to force your registrants to type in their billing information again on the payment page instead of pre-populating.
- ***"Hide Payment Instructions if amount owed is zero*****":** checking this box will hide the payment instructions if the attendee's total amount due is zero.
- ***"Allow registration to continue if transaction fails":*** checking this box will allow the attendee's registration to go through even if their transaction fails.

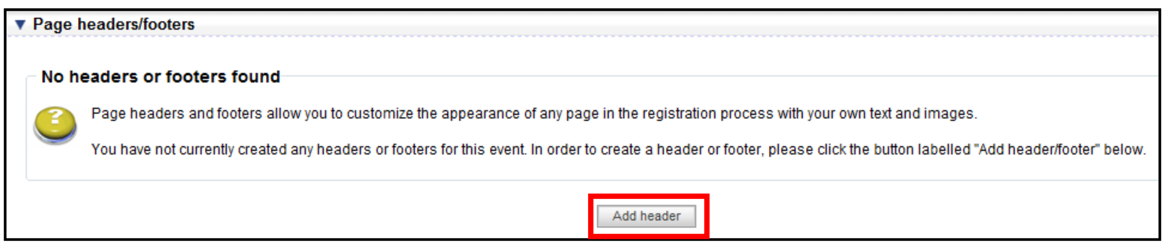
Look & Feel Tab



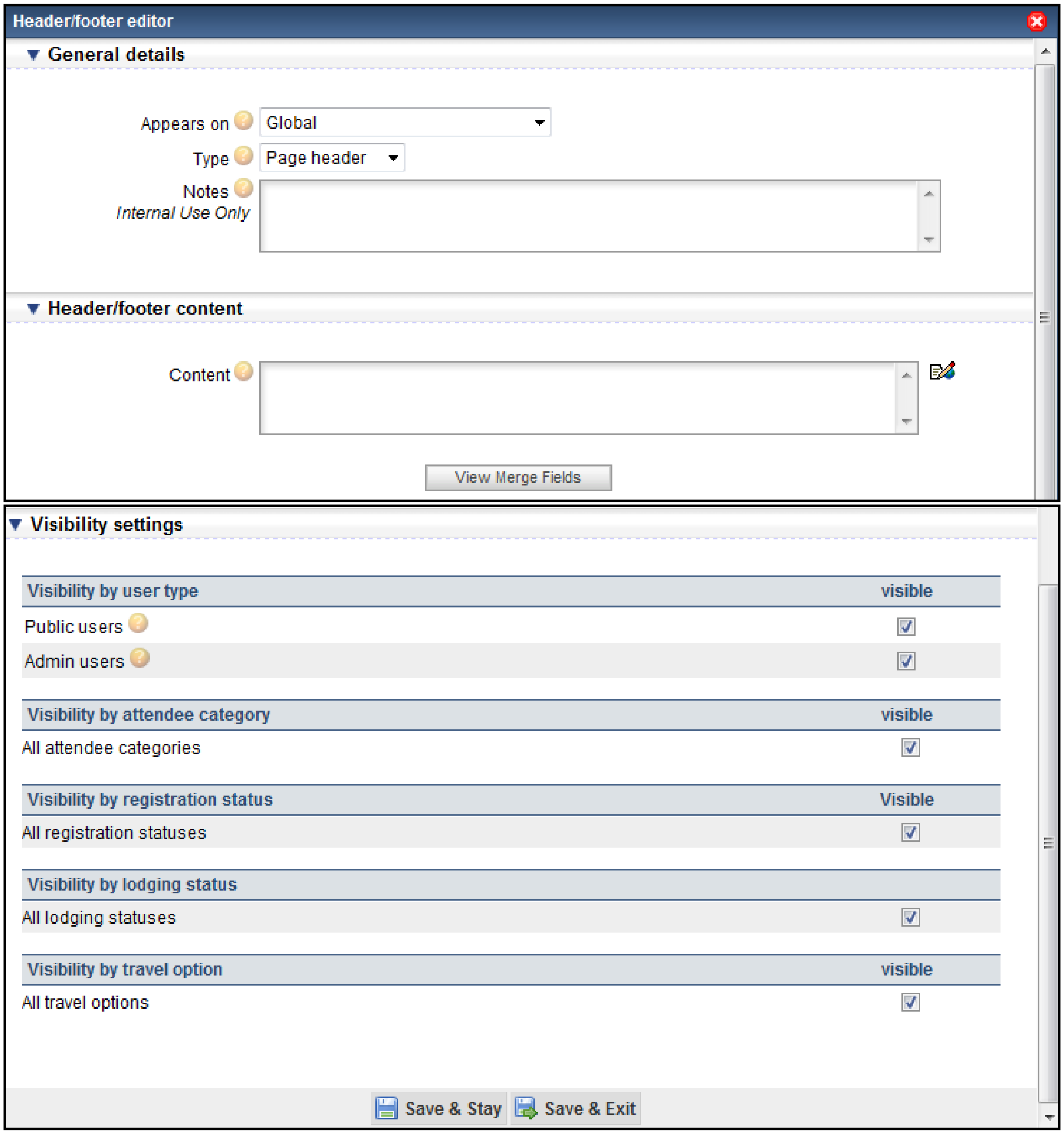
Look & Feel Tab: the look and feel tab consists of four separate pages: the Headers & Footers tab, Template tab, Event Logo tab, and Colors & Fonts tab. To navigate through these pages click the correct tab under the main "Look & Feel Tab."

1. **Headers & Footers Tab:** The headers/footers page has two sections to it, the top sections consists of the header/footers, and the bottom section which is the "Custom Pop-up Windows." The layout of the headers/footers section is similar to the categories where the type of header or footer is on the left, the next column displays any notes assigned to the header or footer, and then you have the standard edit, copy, and delete buttons all the way to the right of the header or footer.





Adding a Header: To add a header or footer, click the button labeled, "Add header" as shown in the screenshot above. Clicking this will open a header/footer editor similar to the question editor.



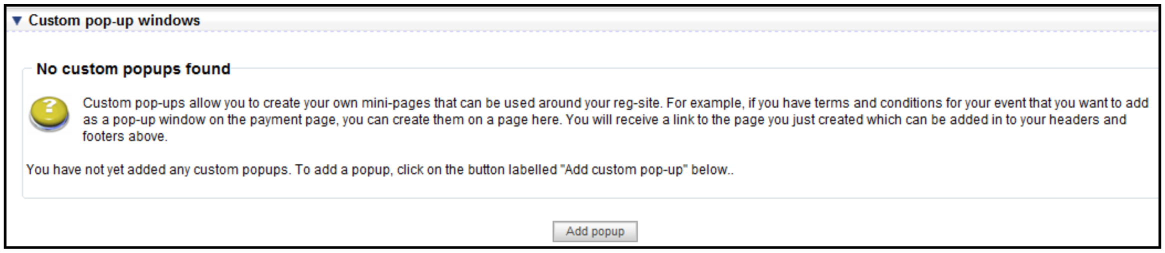
General Details: in this section you will have to input the basic information about your header or footer such as where it should be displayed, type, and the information in it.

- ***Appears on***: use this dropdown box to select where you want the header or footer to appear in your event.
- ***Type:*** use this dropdown box to select one of the four types: header, footer, right side bar or left side bar.
- ***Notes:*** these notes are for your internal use only.

Header/footer content: this is where you input the actual information that will be displayed on the header/footer.

- **Content:** The edit the content click the HTML editor and then input the information you want, then click save.

Visibility settings: in this section you can edit the visibility settings for your header or footer. You can adjust visibility settings by user type, category, status, lodging, and travel option.



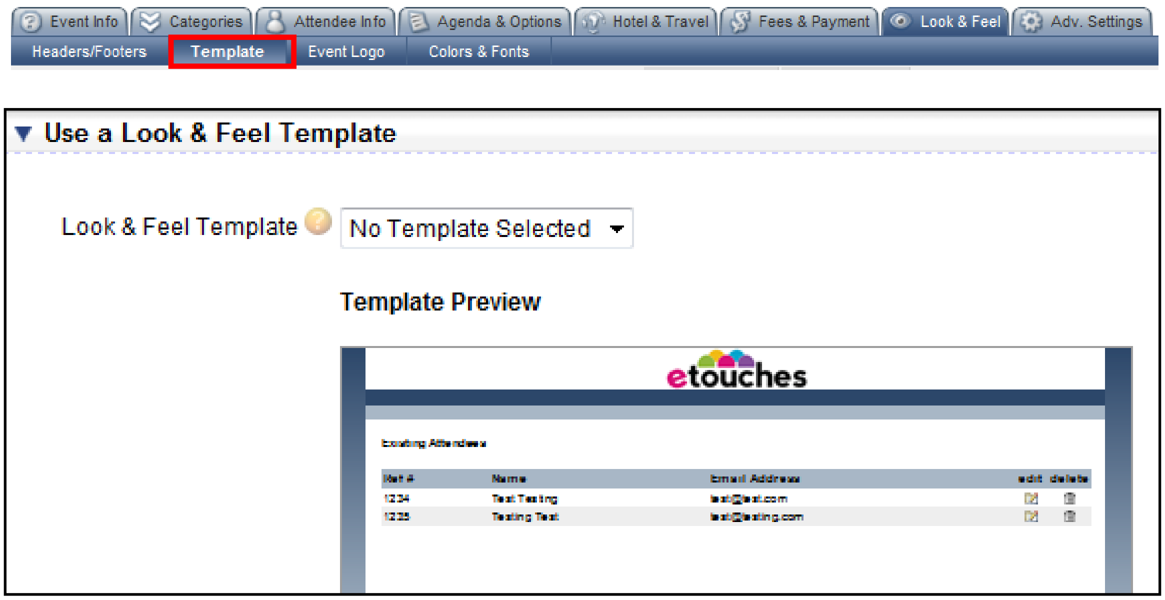
Custom Pop-up Windows: Custom pop-ups allow you to create your own mini-pages that can be used around you registration site. For example if you have terms and conditions for your event that you want to add as a pop-up window on the payment page, you can create them on a page here. You will receive a link to the page you just created which can be added in to your headers and footers above. Below is the layout of the Custom pop-up page, the first column displays the name of the pop-up. The next column is the URL that is associated with each pop-up window. Then all the way to the right is the standard edit, copy, and delete buttons.
Add Popup: to add a custom pop-up click the button labeled “Add custom pop-up” towards the bottom of the page. After doing this a small pop-up editor will appear.

General Details: in this section you will have to input the basic details of your custom pop-up, such as the name, content and notes.

- ***Name:*** input the name of the pop-up here, this will help you identify your pop-up for easy access to make edits.
- ***Content:*** this is the content that will be displayed in the custom pop-up, you can use the HTML editor icon to format that text to your liking.
- ***Notes:*** input any notes associated with the custom pop-up here. Notes are for internal use only to help you and your colleagues identify the pop-up.

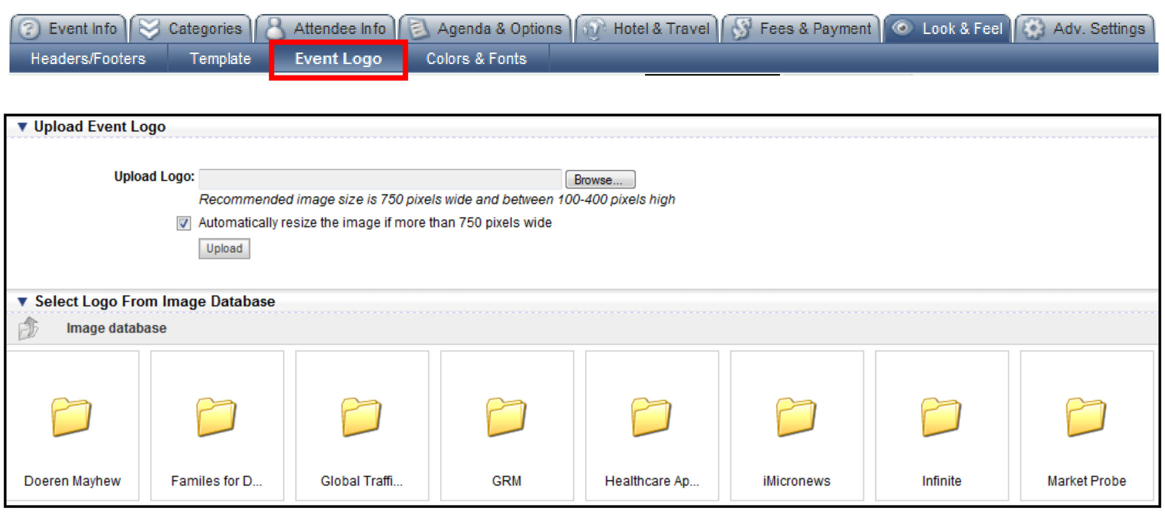
- ***View Merge Fields:*** click this button to open a window that will display merge fields that can be inserted into your custom pop-up. Merge fields can also be inserted when using the HTML editor.

2. **Template Tab:** in this subsection you can choose to use a created template as your look & feel for your event.



Look & Feel Template: select a look & feel template from the dropdown list of templates that are available to your account.

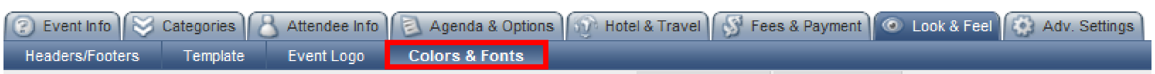
3. **Event Logo Tab:** on this page you will upload the logo you would like to be displayed on the top of every page of the registration site. When you get to the event logo tab you will see a section with an upload bar.

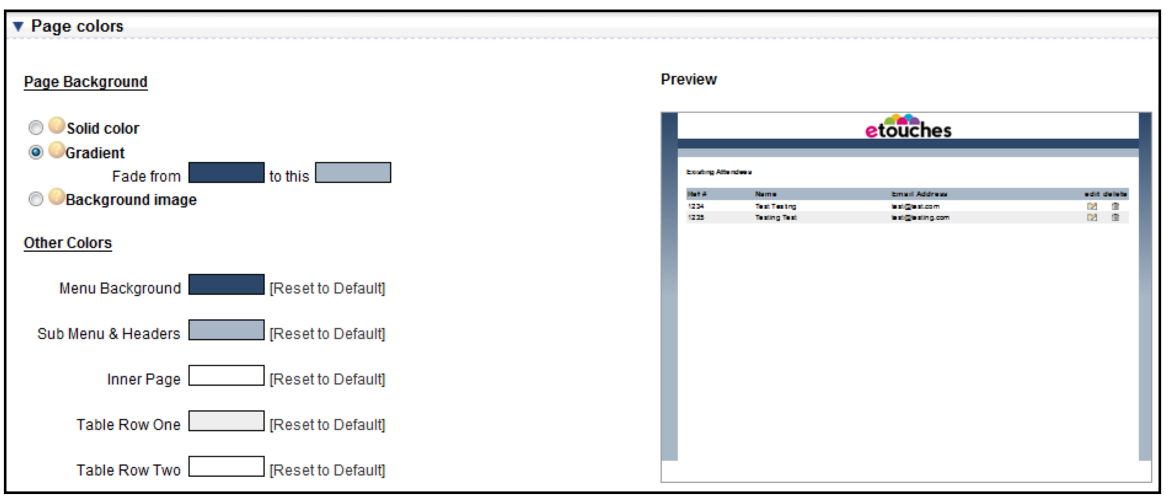


Upload Event Logo: you can browse for the file you want to upload as your event logo. Generally the system cooperates best with jpeg type files. Under the upload bar is a checkbox that gives you the option to have the system automatically resize your image if it is more than 750 pixels wide. The reason this is helpful when checked is because then the logo will not distort your page in any way. After you have selected your image, the page will change to display your image.

Select Logo From Image Database: in this section you have to select an image from your image database to use as your event logo. The image database can only be accessed by an account administrator.

4. **Colors & Fonts Tab:** The colors and fonts tab is where you manage your site's background, color and styles of fonts and other colors. This page is divided into three sections: template, the page colors section, and the fonts section. To the right of the page colors section is a small screenshot of what your event will look like depending on which colors you select.

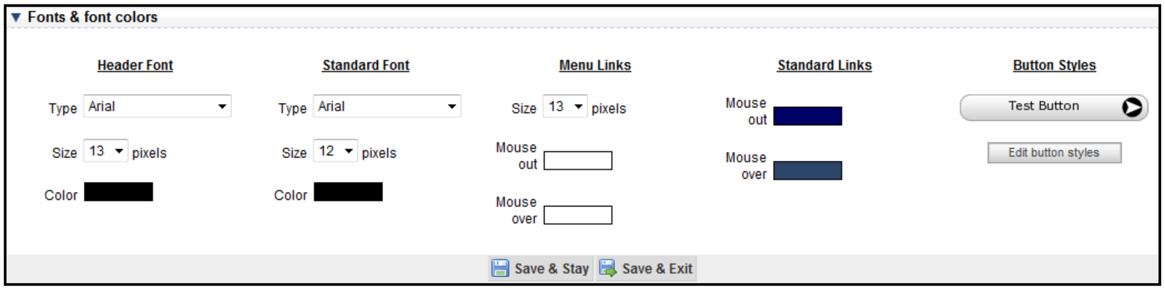




Page Colors: The page colors section is where you choose the background color for your registration site and the other colors.

- **Page Background:** the page background section is where you select which style your background will be.
- ***Solid color:*** this option makes your background one solid color, but you then have the option to add a drop shadow to the main table.
- ***Gradient:*** this option makes your background a gradient which is one color fading into another color. You can choose the two colors to use in your gradient.
- ***Background image:*** if you want to use an image as a background instead of the other options then select this option. You will then have to choose

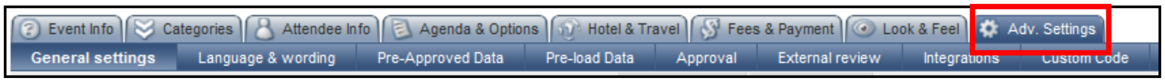
the image from the image database. Depending on the size of the image, it will overlap throughout the page.



Fonts: In the fonts sections you can alter the type, size, and color of fonts for different parts of the event.

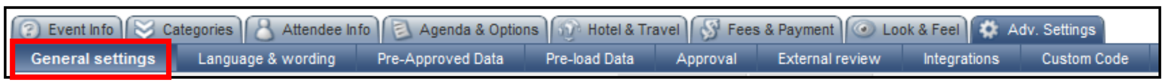
- ***Header Font:*** change the header font by using the dropdown boxes for the type and size, and click the color box to change the color of the font.
- ***Standard Font:*** change the standard font by using the dropdown boxes for the type and size, and click the color box to change the color of the font.
- ***Menu Links:*** use the dropdown box to change the size of the menu links. You can also click on the color boxes to change the color of the font when your mouse is over the link and when it isn't.
- ***Standard Links:*** you can click on the color boxes to change the color of the standard links when the mouse is over the link and when it isn't.
- ***Button Styles:*** Select from a list of button styles, or use the button generator to create your own.

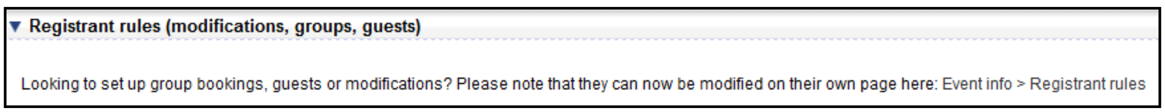
Advanced Settings Tab



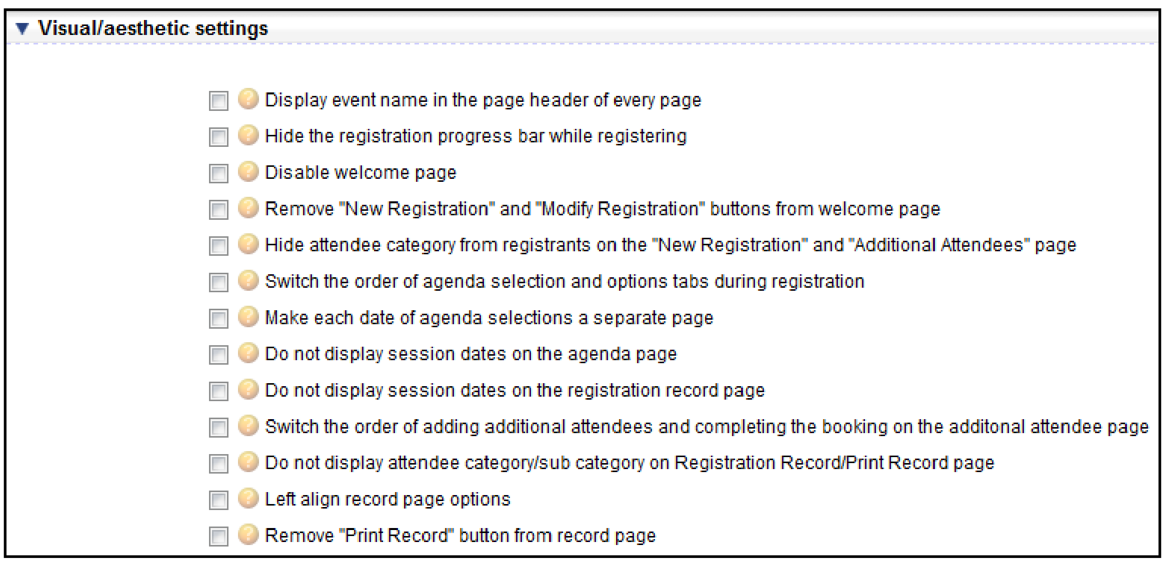
Advanced Settings Tab: The advanced setting tab has seven sections. These sections are: General Settings, Language & Wording, Pre-Approved Data, Pre-Load Data, Approval, External Review, Integrations, and Custom Code.

1. **General Settings Tab:** On the general settings tab there will be four sections: Registrant Rules, Visual/Aesthetic Settings, Payment/Invoicing Settings, and Other/Miscellaneous.

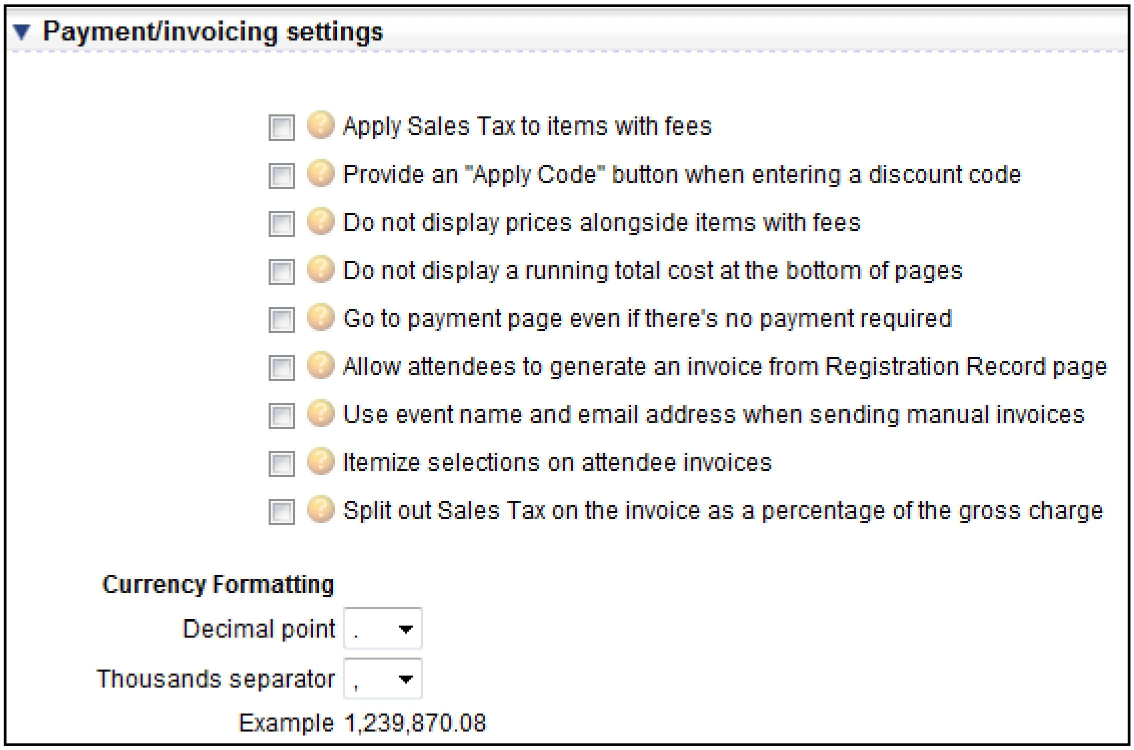




Registrant Rules: The registrant rules can be modified on the Event Info page.

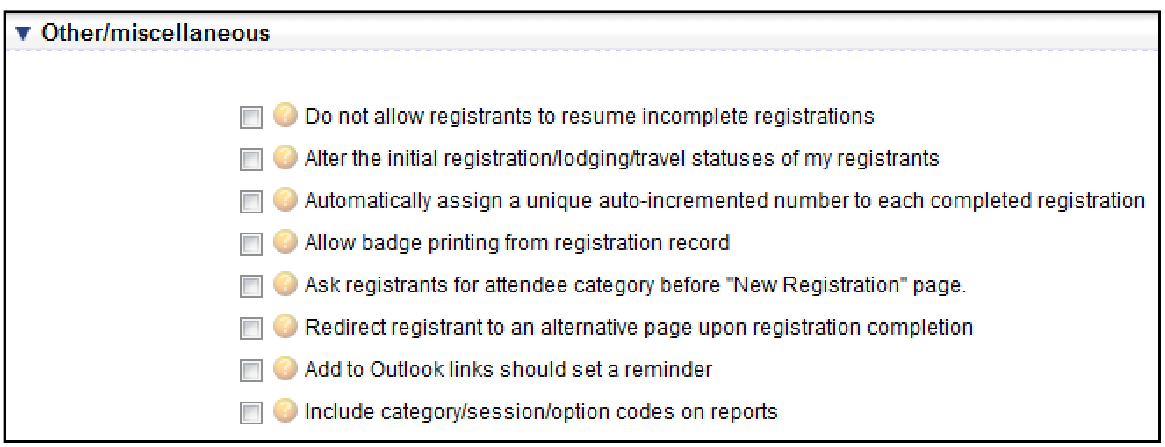


Visual/Aesthetic Settings: in this section you will specify the visual settings for your event.



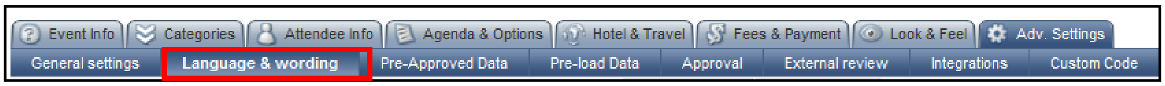
Payment/Invoicing Settings: in the payment/invoicing settings tab you can select all your payment settings. Just like the visual settings above, you can check the options you would like to apply and continue with any other information that populates based on an answer.
Currency Formatting: in this subsection you can change the format of the currency your event is using.

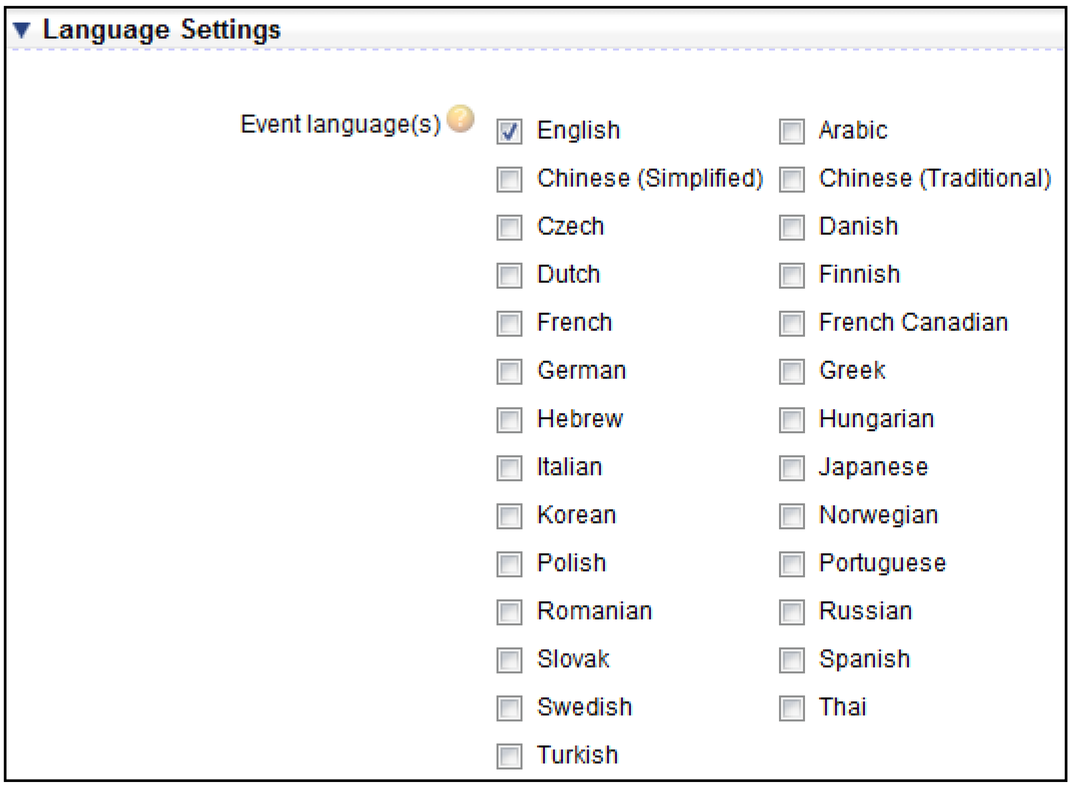
- ***Decimal Point:*** input the character that you want the system to identify as the decimal point.
- ***Thousands Separator:*** input the character that you want the system to identify as the thousands separator.



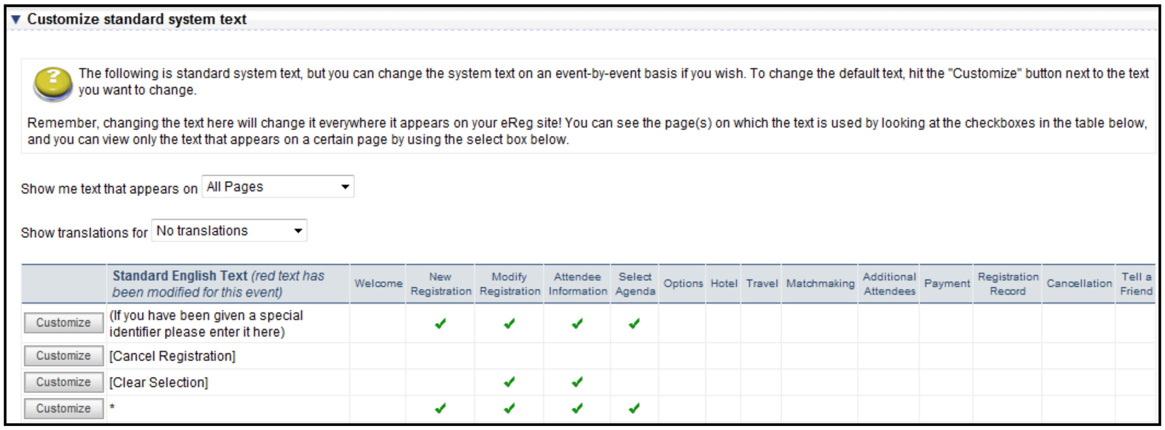
Other/Miscellaneous: in the section labeled "Other/Miscellaneous" you can choose to select miscellaneous settings for your event. A few of these checkboxes, when checked will populate more information that will be needed to fill in.

2. **Language & Wording Tab:** the language and wording tab is where you set the languages of your event and customize the standard system text. You have 27 languages to choose from. Customizing standard text in your event is useful if you want to rename a page, change the order of words, or enter something completely different.



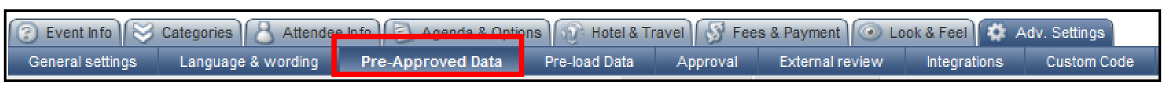


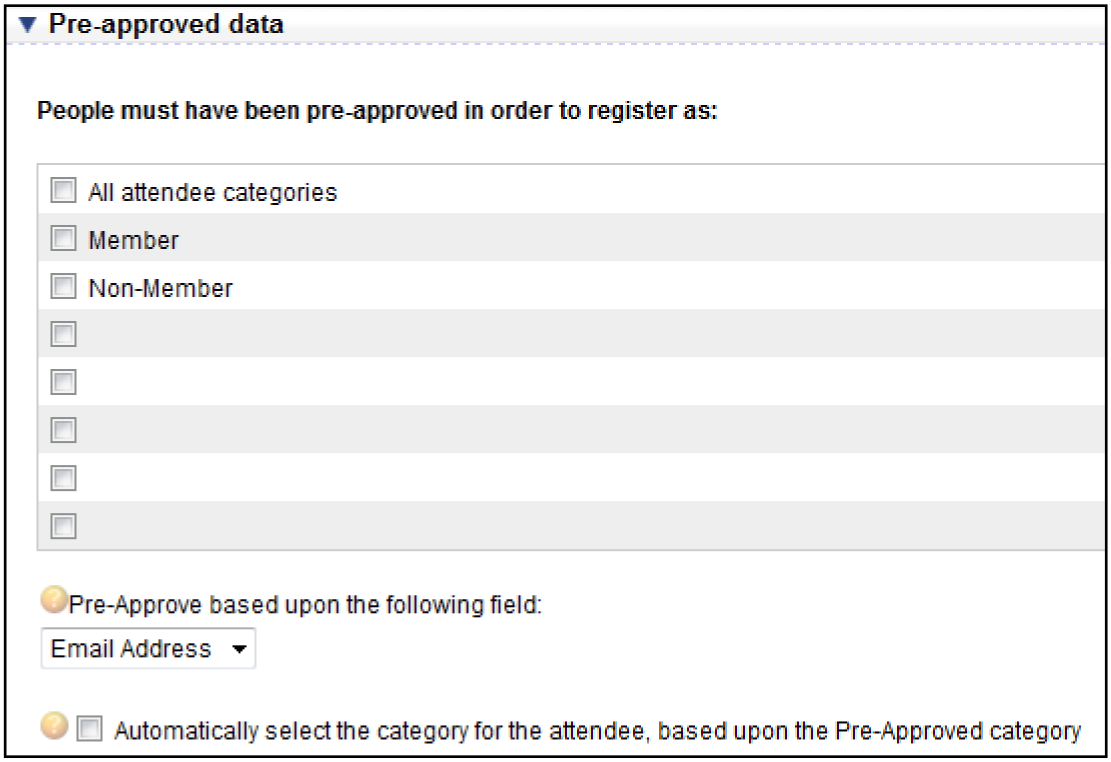
Language Settings: in this section you will have to select which languages by checking the appropriate checkboxes. Once you have selected the languages you want, you will have to select a default language for your event, and if the registrant wants a different language, they will be able to switch the language on the actual registration site.



Customize Standard System Text: in this section you will see a long list of the standard text that you are able to edit for your event. You have the option to choose to see the text that only appears on certain pages by changing the dropdown list. Before you edit any text, be sure to check which pages your changes will appear on. To do this, simply look to the right of the text and if there is a green check under the page, then that text appears on that specific page. To customize the text, click the customize button to the left of the text. Then a window will open in which you will need to enter the new text. Any text that is edited will have red font displaying that it has been changed.

3. **Pre-Approved Data Tab:** in this section you will be able to change the settings of your pre-approved registrants as well as select which categories they can register for.



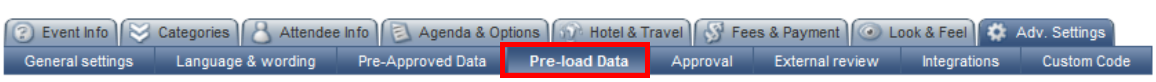


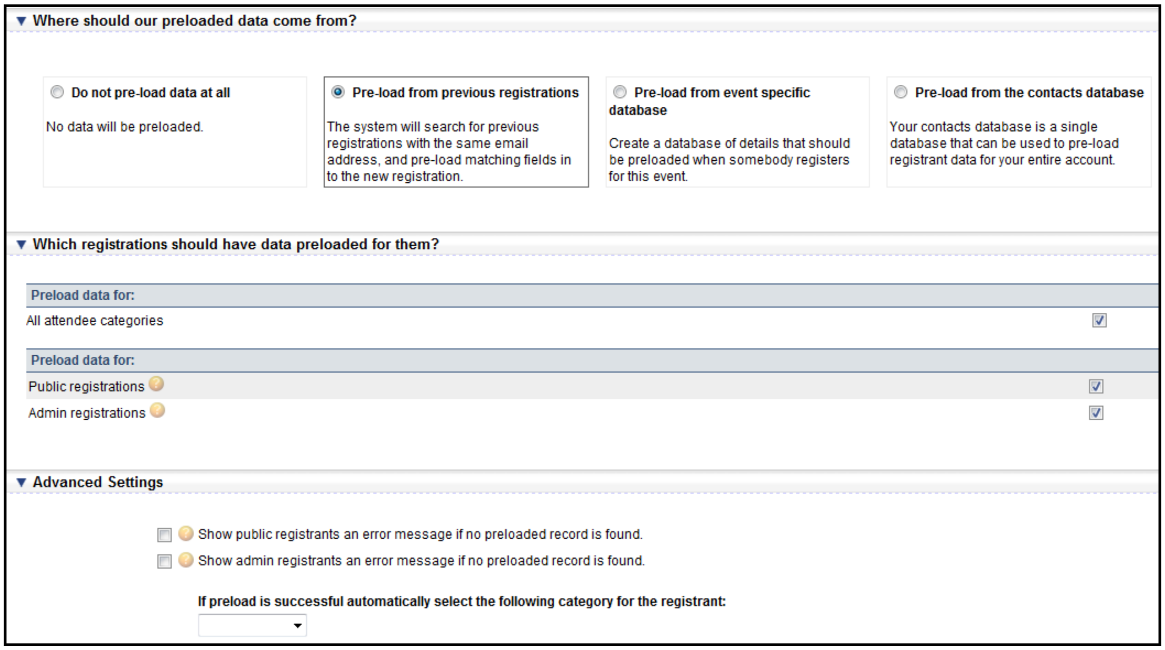
Pre-Approve based upon which field: select which of the fields on the welcome page you want to use to pre-approve your registrants.

- ***Email Address:*** if email address is selected the registrants will be pre-approved based on the email address they use.
- ***Other Identifier:*** if other identifier is selected the registrants will be pre-approved based on the other identifier entered.

Email Suffixes: to pre-approve registrants based on the suffix of their email address, enter the suffixes in this field separated by a semicolon.

4. **Pre-load Data Tab:** if you want to pre-load attendee's data based upon their response to a certain question, you can do so by using this page. There are four different types of pre-loading: do not pre-load data at all, pre-load from previous registrations, pre-load from event specific database, and pre-load from the contacts database for this account.

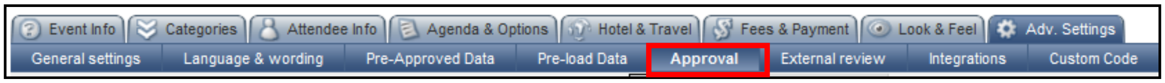


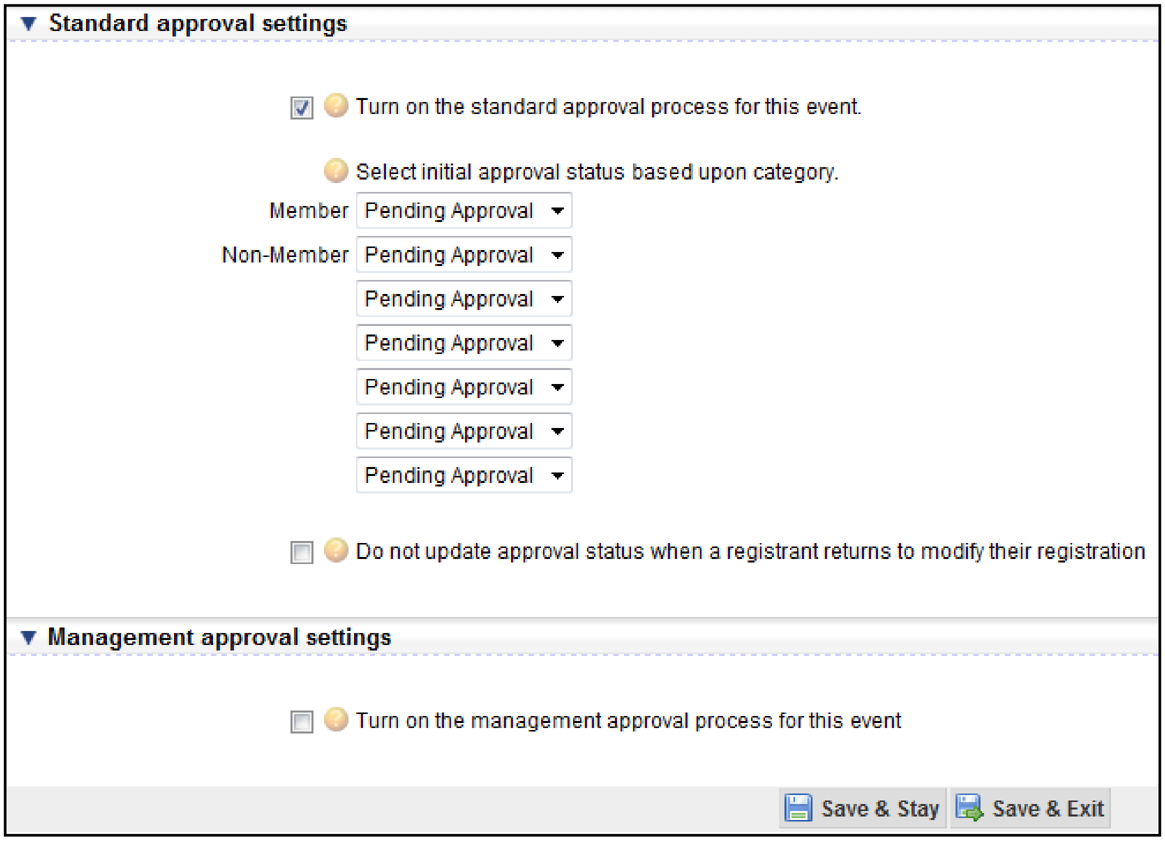


Do not pre-load at all: no data will be pre-loaded. Use this option if you do not have to pre-load.
Pre-load from previous registrations: this is the default setting. The system will search for previous registrations within the same account, and pre-load matching fields in to the new registration. Use this option if you have many registrants who may have attended a previous event and are attending a similar event.
Pre-load from event specific database: upload data that will be pre-loaded for this event only. Use this option if you only have a few registrants that you want to upload yourself. In order to upload a file, it needs to be a .csv file. Once it is uploaded it will link to the registrants email to pre-populate their information. The fields of the .csv file should match up to the attendee information field in eReg. When the .csv file does not contain one of the fields then put a blank field in its place as shown below.
Pre-load from the contacts database: create a single database to pre-load data for attendees for the entire account. Use this setting if you have a master database for your account, and all events in this account will pre-load data from this database. You can set this up by going to cross-event reports and the number database.
Which registration should have data preloaded for them? Here you can limit the pre-loaded information for public and admin registrations, as well as by categories. This can be done by checking the appropriate checkboxes.
Advanced Settings: in the pre-load advanced settings you can make sure no one can register for the event unless they are already pre-registered. This can be done by checking the appropriate checkboxes.

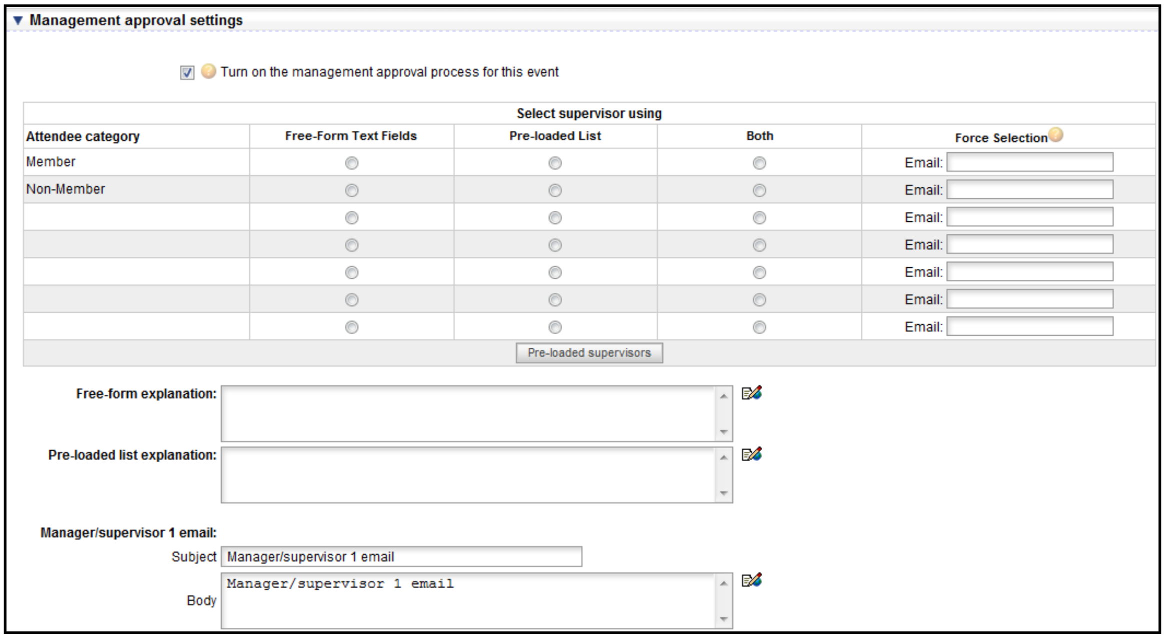
5. **Approval Tab:** On this page you can choose whether or not you want to approve each registrant as they register for the event. This option is

located in the standard approval settings. Under the management approval settings you can check the box that requires registrants to obtain approval from managers in order to register for the event. This allows the system to automatically email certain managers to ask for their approval.





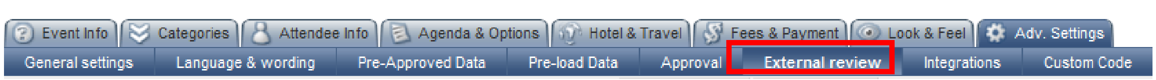
Standard Approval Settings: in this section you can adjust the standard approval settings for your event.

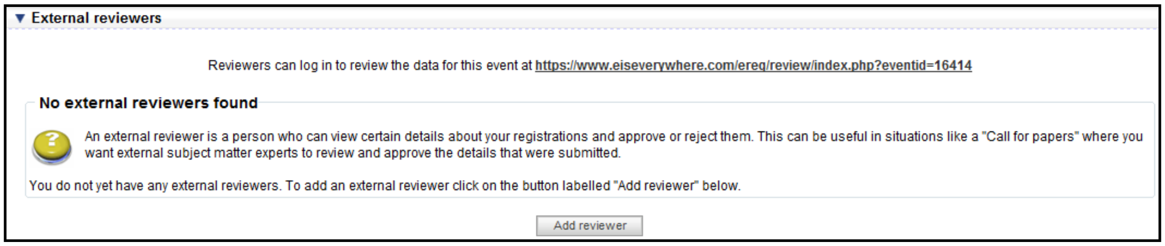


Management Approval Settings: in this section you can turn on the management approval settings for this event and adjust the settings.

- **Attendee Category:** this is the list of attendee categories that you have available.
- **Free-Form Text Fields:** select this radio button if you want to use free form text fields.
- **Pre-loaded List:** select this button if you want to use a pre-loaded list.
- **Both:** select this option if you want to use both - pre-loaded list and free form text fields.
- **Force Selection:** inputting an email address here would force this as a selection.
- **Preloaded Supervisors:** clicking this box would open up the window displayed below. Input the first name, last name, initial email, and second email of each of the preloaded supervisors.
- **Free Form and Pre-Loaded Explanations:** if the above option for free-form, pre-loaded list, or both was selected, use this field to input an explanation for each. You can use the HTML editor to format the text.
- **Emails:** in this section you can input the information for each email. Input the subject and body of the email in these sections.
- **View Merge Fields:** click this button to view a list of the merge fields that can be added to your emails. You can also add merge fields using the HTML editor.

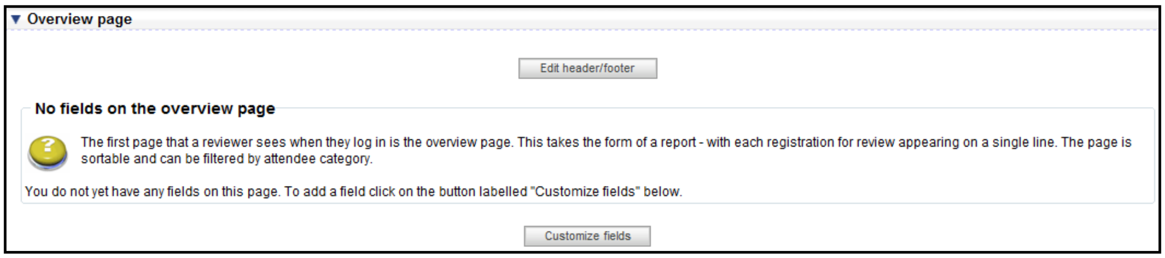
6. **External Review Tab:** you can add an external reviewer that can view certain details about your registrations and approve or reject them**.**



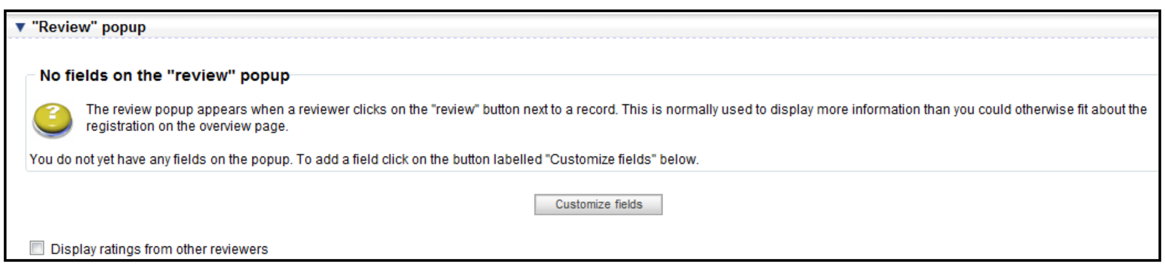


External Reviewers: you can add the review in this section.

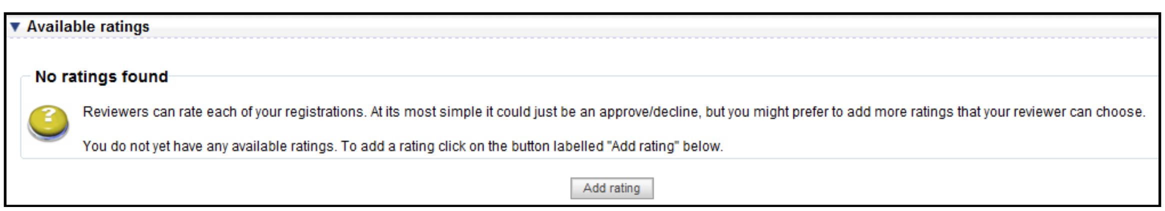
- **Add Reviewer:** an external reviewer is a person who can view certain details about your registrations and approve or reject them, but cannot see the reviews from other reviewers. A power reviewer is a type of external reviewer who can see all reviewed people and their reviewers. However, a power reviewer cannot see non-reviewed people and is unable to review anyone.



Overview Page: the first page that a reviewer sees when they log in is the overview page. This takes the form of a report – with each registration for review appearing on a single line. The page can be sorted and can be filtered by attendee category.

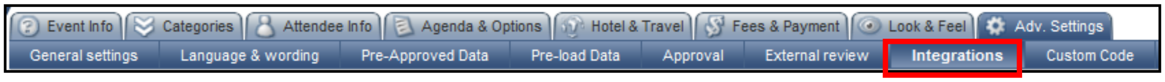


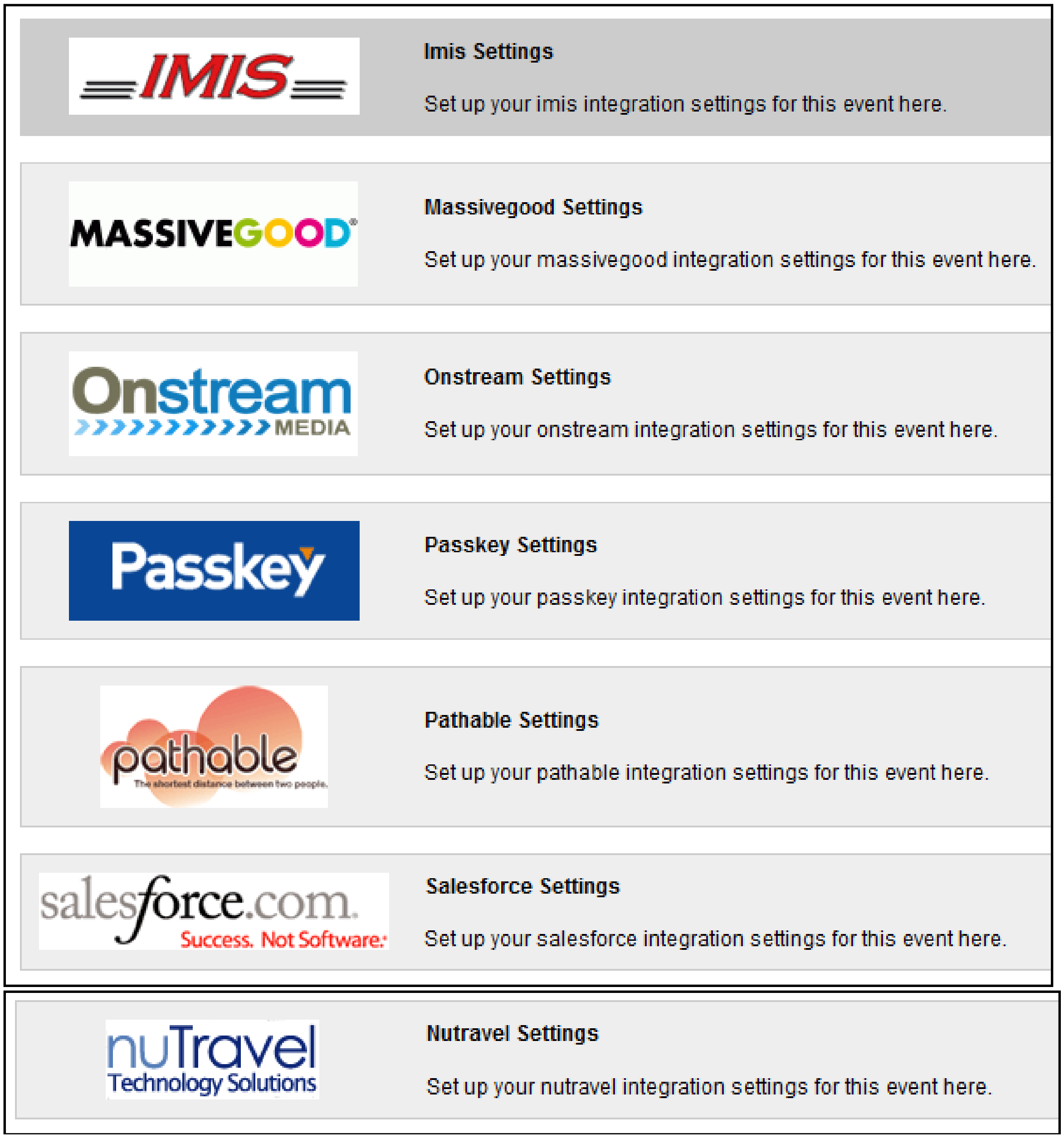
Review Popup: the review popup appears when a reviewer clicks on the “review” button next to a record. This is normally used to display more information than you could otherwise fit about the registration on the overview page.



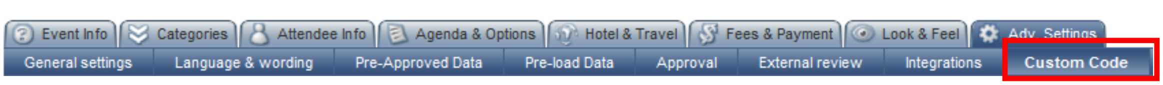
Available Ratings: reviewers can rate each of your registrations. At its most simple it could just be an approve or decline option, but you might prefer to add more ratings that your reviewer can choose.

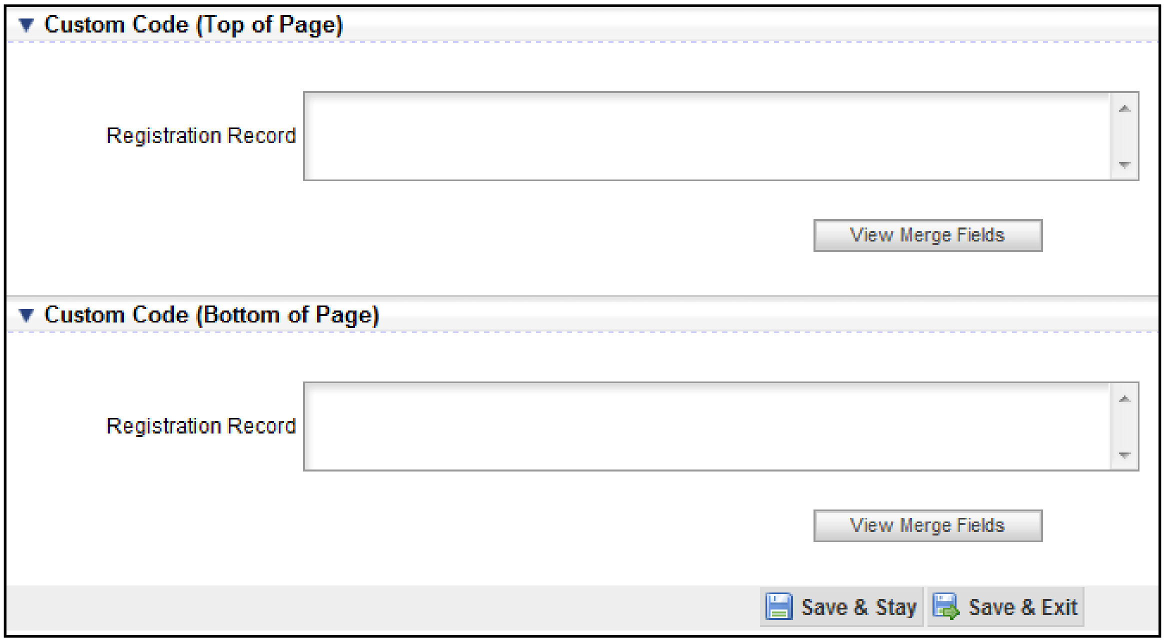
7. Integrations Tab: this is the section where you can set up all your integrations. Each integration will take you through specific steps to get it set up.



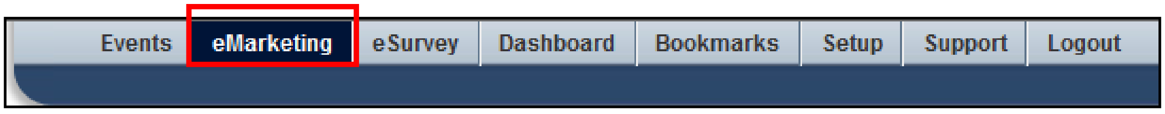


8. **Custom Code Tab:** in this section you will be able to input any custom text or code that you would like to be placed either on the top, bottom, or both parts of your registration record. If you want to input text on the top of the page, input the information in the section labeled "Custom Code (Top of Page)" and for the bottom, enter the information in the section labeled "Custom Code (Bottom of Page)." You can also enter in merge fields into this custom code by clicking the "View merge fields" button under the text box.

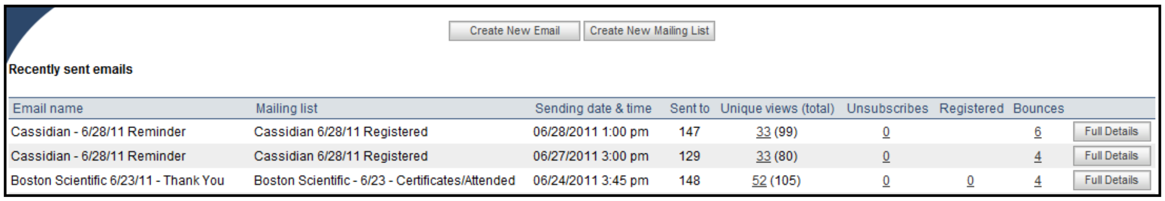



Custom Code (Top of Page)
Registration Record
View Merge Fields
Custom Code (Bottom of Page)
Registration Record
View Merge Fields
Save & Stay
Save & Exit

eMarketing Module



This module allows the user to create emails and the mailing lists. You can also keep track of the subscribers, unique views, and obtain detailed reports that can help you measure the success of your emails.



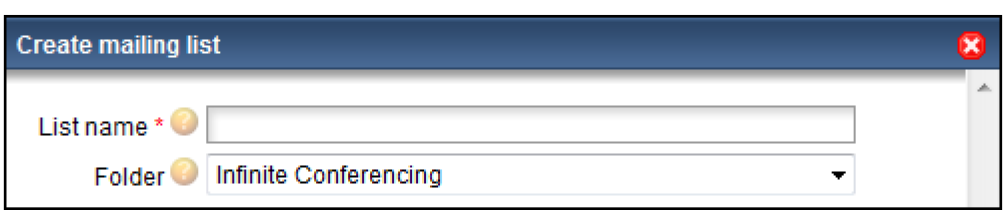
Create New Email | Create New Mailing List

Recently sent emails

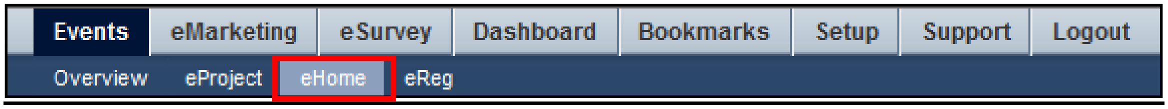
Email name	Mailing list	Sending date & time	Sent to	Unique views (total)	Unsubscribes	Registered	Bounces	
Cassidian - 6/28/11 Reminder	Cassidian 6/28/11 Registered	06/28/2011 1:00 pm	147	33 (99)	0		6	Full Details
Cassidian - 6/28/11 Reminder	Cassidian 6/28/11 Registered	06/27/2011 3:00 pm	129	33 (80)	0		4	Full Details
Boston Scientific 6/23/11 - Thank You	Boston Scientific - 6/23 - Certificates/Attended	06/24/2011 3:45 pm	148	52 (105)	0	0	4	Full Details

Create New Email Button: You can create a new email by clicking the button labeled “Create New Email” located at the top of the main page. Once you click this button, a small window will open. In this window, you will need to create a name for your email. This is the name that will be used on the site. Choose a folder to place your email in so that you can keep your emails organized and it can be used to determine who has access to the email.

Create a Mailing List Button: Once you reach the point where you have completed your email, before you send it, you have to have a designated mailing list to send it to. You can create a new mailing list by going to “Create New Mailing List” on the top of the screen. Once you choose to create a new mailing list, before you get into the details, you have to create the name and place it in your account first.



eHome Module



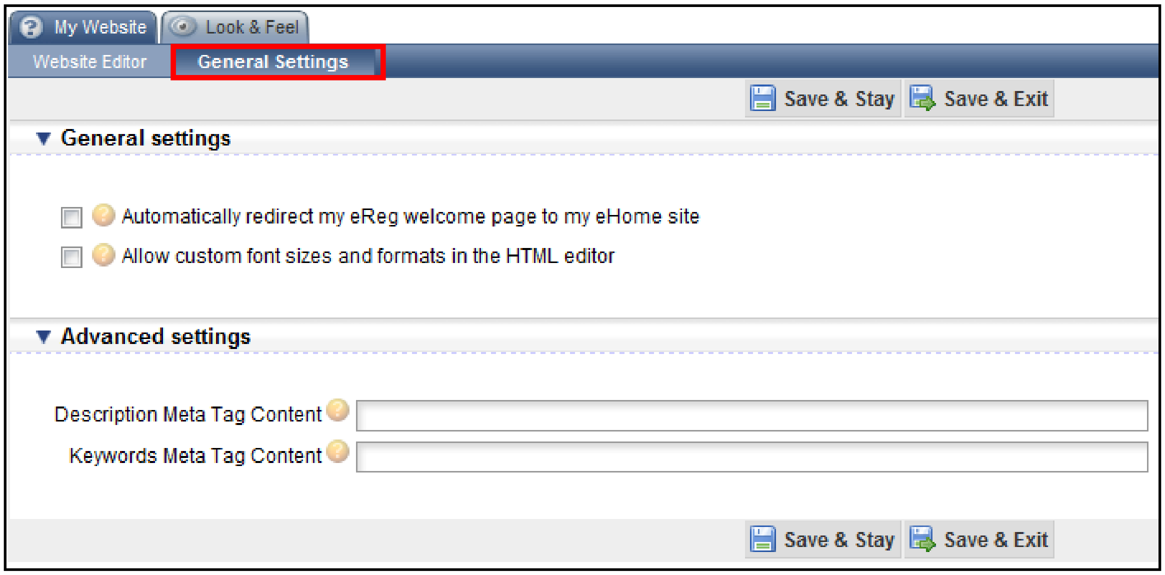
The eHome event website builder, which is integrated with the eReg application, is a tabbed, centralized micro-site that serves as the “face” of the event, providing an overview of event details, sessions, venues and more, allowing full flow-through for event delegates to online registration.

My Website Tab

My Website Tab: this tab contains two sections - the Website Editor page and the General Settings page.

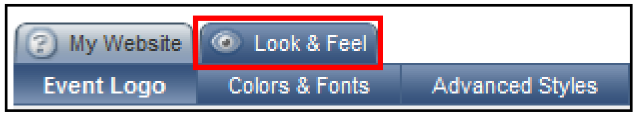
1. **Website Editor Tab:** this page displays your current eHome web page, and it will be where you make any changes or add information to your web page.

- **Add New Page:** by clicking the button labeled “Add new page” a window will populate requiring more information about the new page.
- **Edit Page:** this button will display the same popup menu as the “add new page” button. This is where you can make any changes to page.
- **Delete Page:** by clicking the “delete page” button, a notification message will appear on your screen. If you are sure you want to delete the specified page, select “OK”, if not select “Cancel”.
- **Reorder Pages:** The order that your tabs/pages are displayed under your event logo is the same way your registrants will see it when they visit the site. You can change the order of these tabs by clicking this tab.
- **Add Content:** You have the ability to add content to a section of your page in 8 different types. To add new content to your page, find the section of the page you want to add the content to, and click on this button.

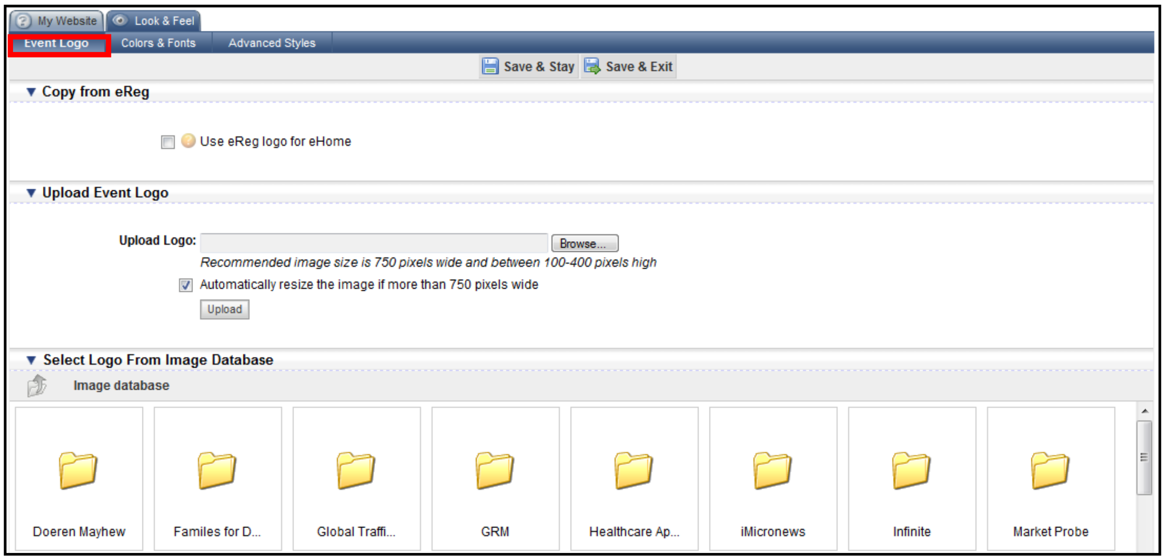


2. **General Settings Tab:** in the general settings section, there are two options available. You have the option to automatically redirect your eReg welcome page to your eHome site which means that anytime a registrant clicks the link associated with your registration page, they will be redirected to your eHome site. The next option allows your font to be custom sizes and formats in the HTML editor; this is used for the custom content type.

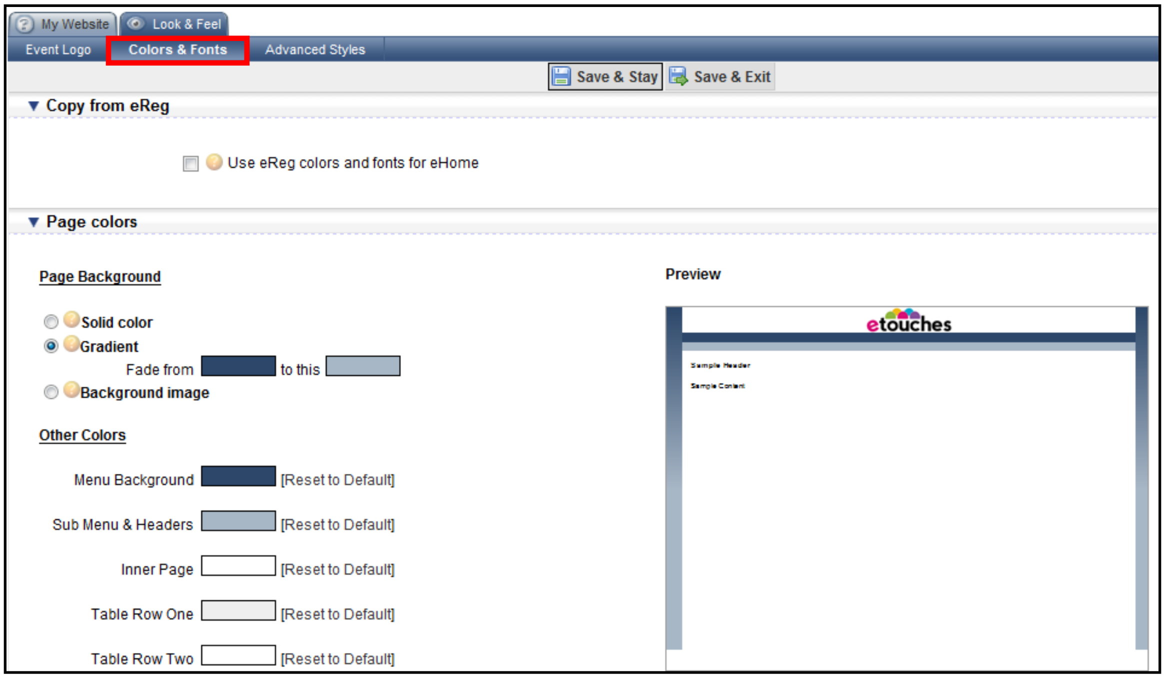
Look & Feel Tab



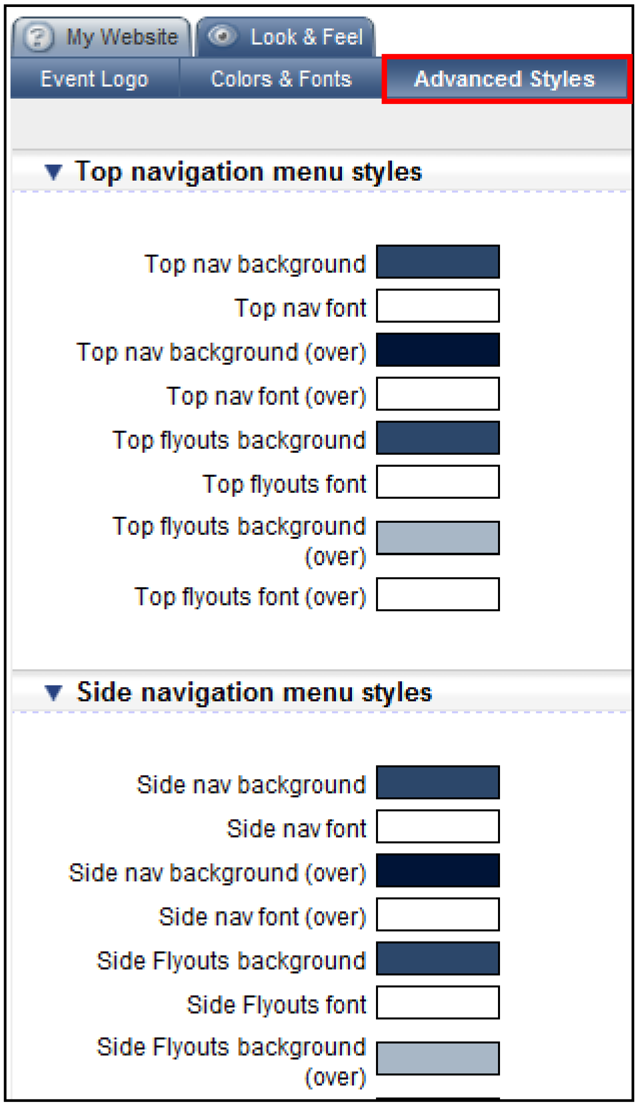
Look & Feel Tab: this tab contains three sections – Event Logo, Colors & Fonts, and Advanced Styles.



1. **Event Logo Tab:** if the event logo for your eHome site is the same as the event logo from eReg then check this box. If you would like to use a different logo, then uncheck the box and two more sections will populate. You can either upload an image or select one from the Image Database.

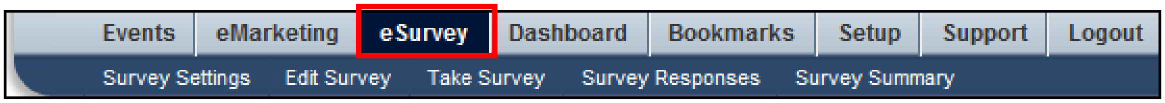


2. **Colors & Fonts Tab:** if you want to use the same colors & fonts as in eReg, then check the box in the first section. If you choose to select different colors and fonts, then uncheck the box and you will see two new sections populate. Then select the page colors and fonts you want for your eHome site.



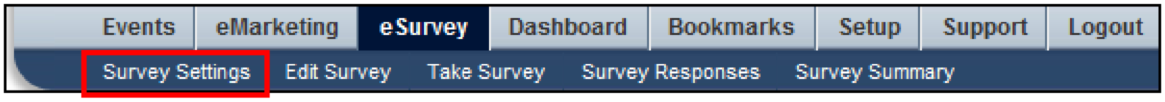
3. **Advanced Styles Tab:** the advanced styles menu allows you to change the colors of the navigation menus and adjust the width, padding, and margins. To change the colors, simply click the color you want to change and select a new color. To change widths, padding, and margins, use the text fields and dropdown boxes.

eSurvey Module

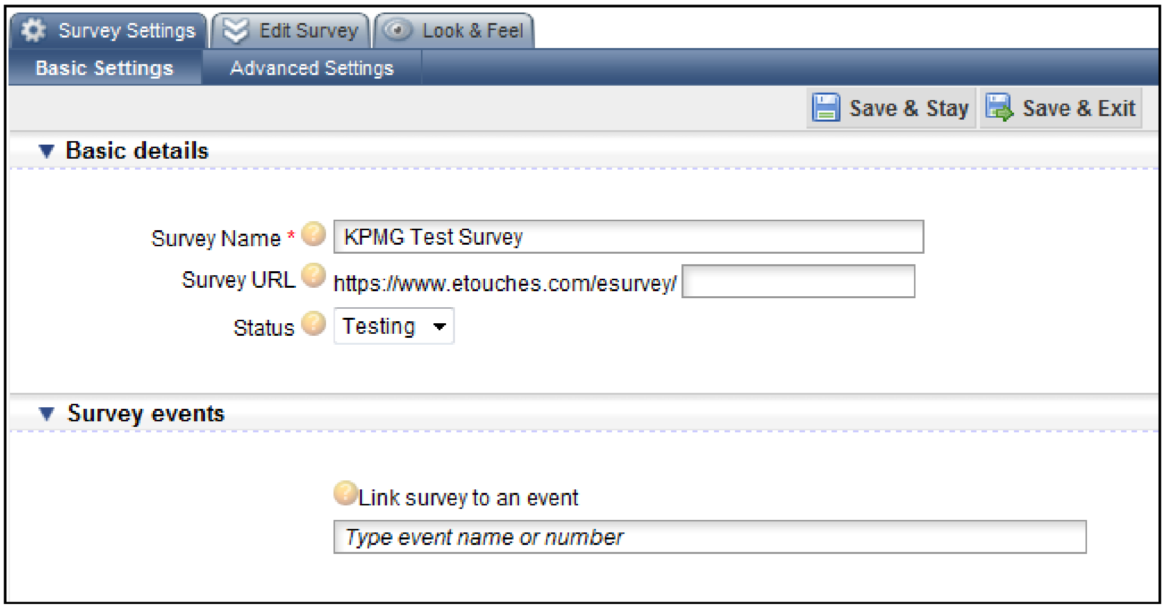


eSurvey polling allows you to get an idea of your attendee base with surveys prior to the event (to help shape last-minute program changes), during the event (to develop industry trend data) and post-event (to process feedback to be considered in future events).

Survey Settings Tab

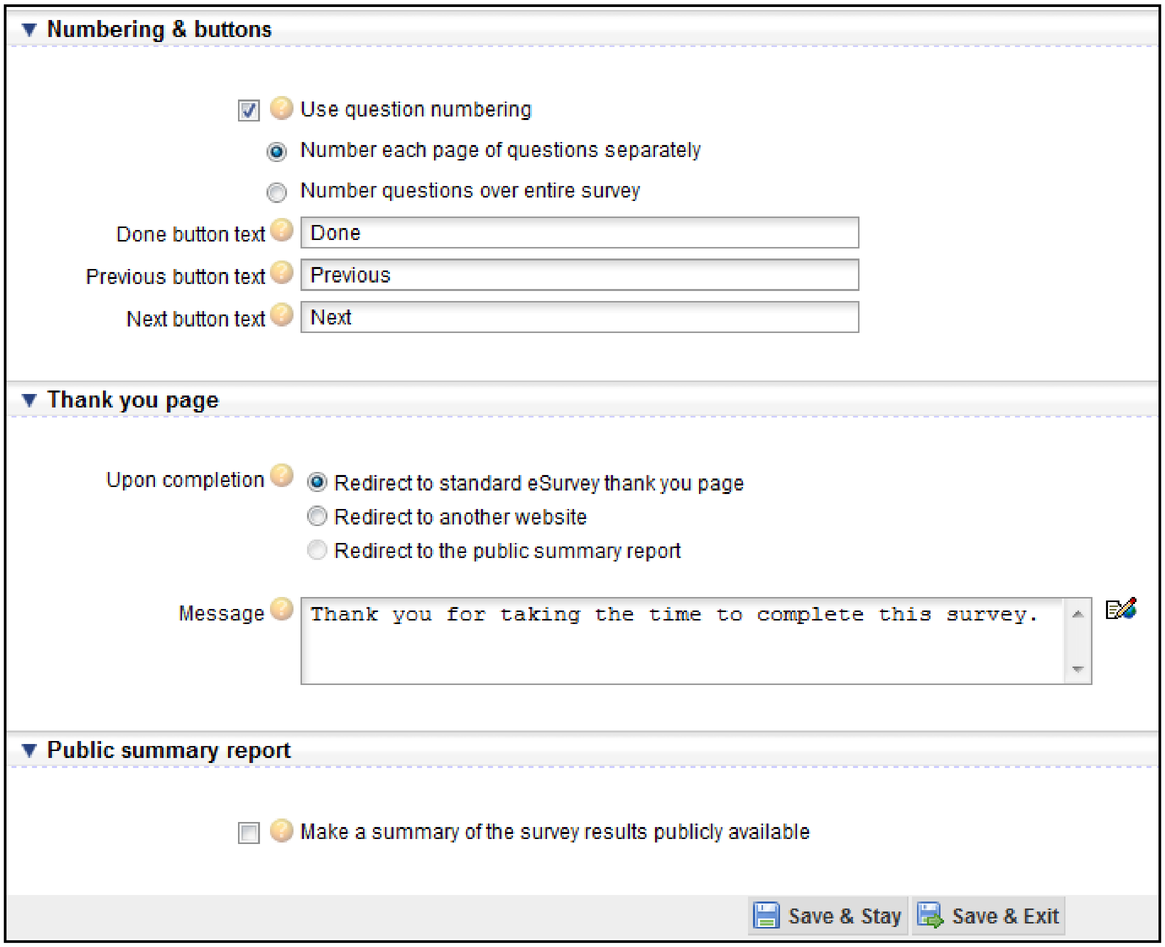


Survey Settings Tab: the survey settings tab has two sections – basic settings and advanced settings.



1. **Basic Settings Tab:**
   - ***Survey Name***: enter the name of your survey here.
   - ***Survey URL***: type an alternative YRL by which people can reach your survey.
   - ***Status:*** select the status of your survey: testing, live, or inactive.

Survey Events: add another event that this survey is connected to. Type in the appropriate event name or event ID to search for the available events.



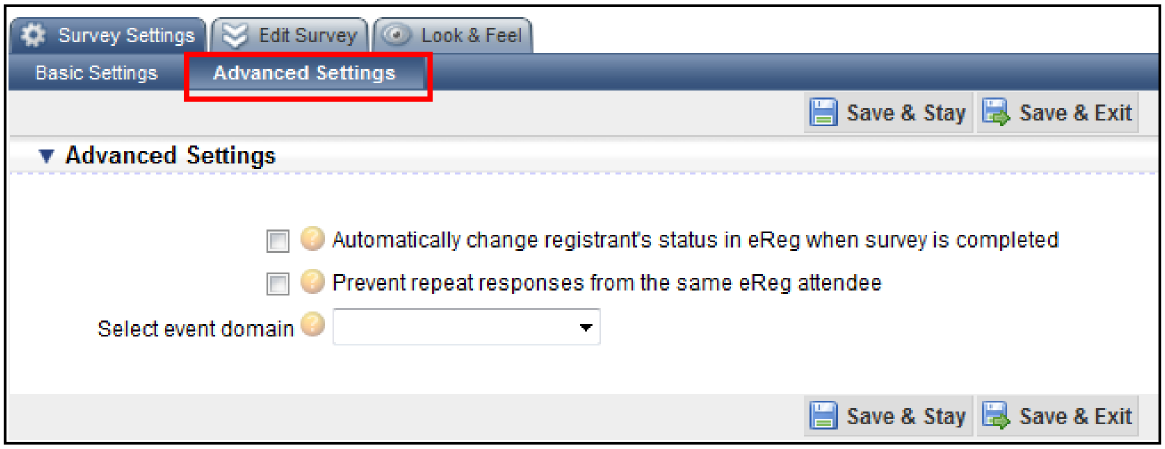
Numbering & Buttons:

- ***Use question numbering:*** if you use question numbering then your survey questions will automatically be numbered when you view the survey.
- ***Done button text:*** enter the text you want to appear on the "Done" button here.
- ***Previous button text:*** enter the text you want to appear on the "Previous" button here.
- ***Next button text:*** enter the text you want to appear on the "Next" button here.

Thank You Page:

- **Upon completion:** configure what people should see when they complete the survey.
- **Message:** this is the message that will display to respondents when they complete your survey.

Public summary report: Making your survey results publicly available allows you to easily display a summary of the inputs to any interested parties without requiring that they have a login.

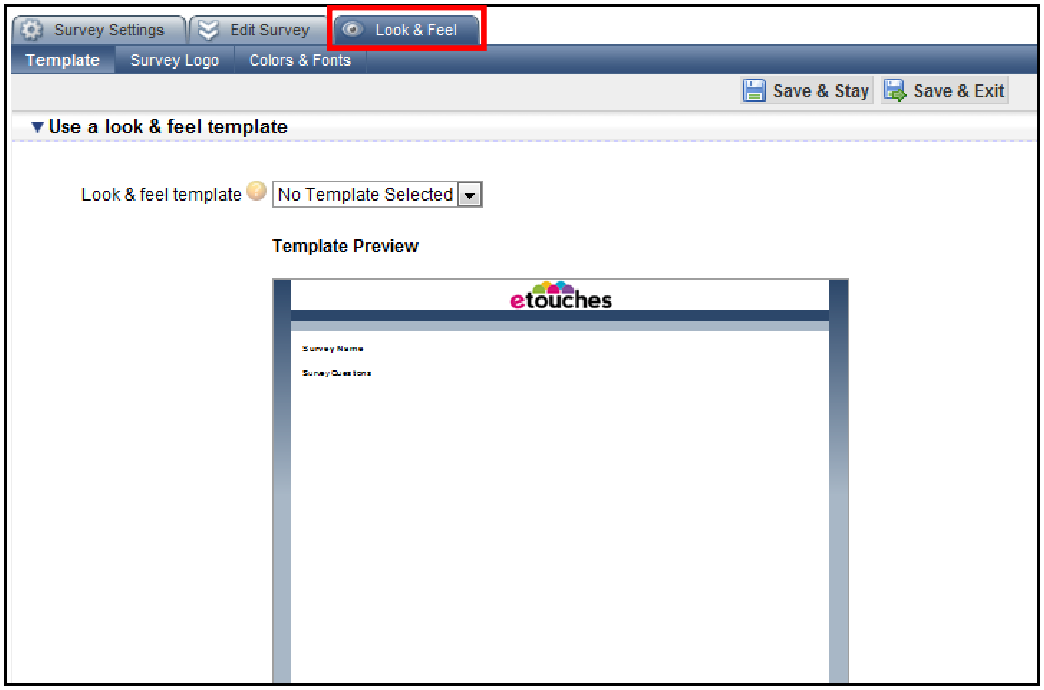


2. **Advanced Settings Tab:** checking this box allows you to automatically change registrant's status in eReg when the survey is completed.

Edit Survey Tab

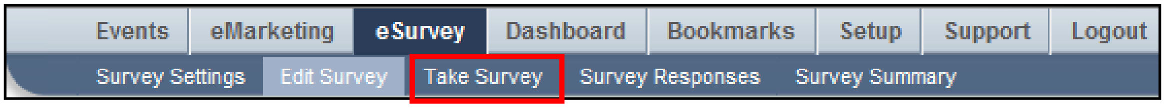
Edit Survey Tab: you can make changes to your existing survey through this section.

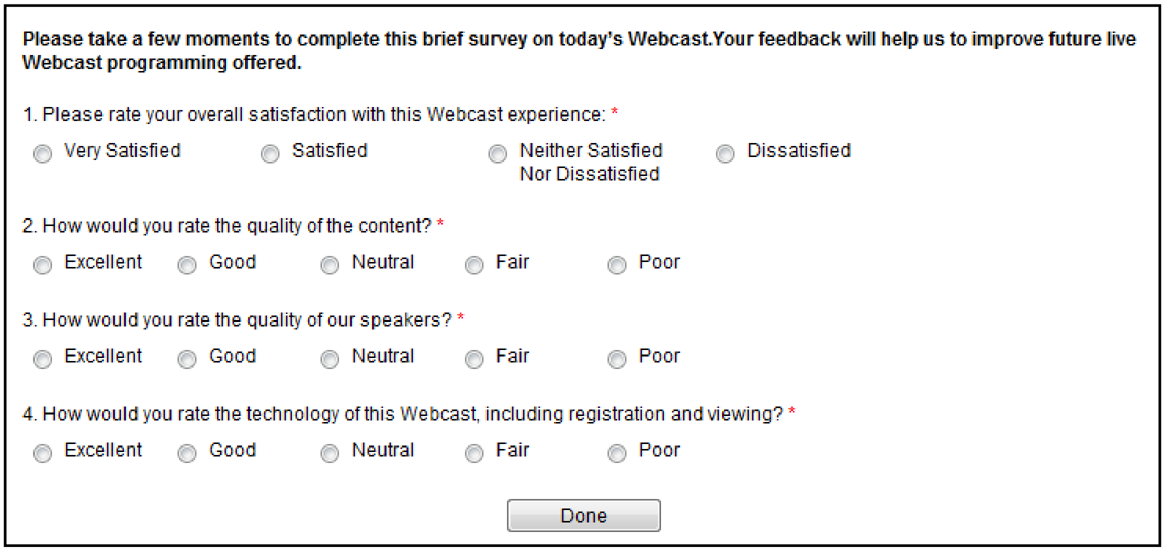
Look & Feel Tab



Look & Feel Tab: you can set up your survey template with this section including the logo, colors and fonts.

Take Survey Tab





Please take a few moments to complete this brief survey on today's Webcast.Your feedback will help us to improve future live Webcast programming offered.

1. Please rate your overall satisfaction with this Webcast experience: *

Very Satisfied   Satisfied   Neither Satisfied Nor Dissatisfied   Dissatisfied

2. How would you rate the quality of the content? *

Excellent   Good   Neutral   Fair   Poor

3. How would you rate the quality of our speakers? *

Excellent   Good   Neutral   Fair   Poor

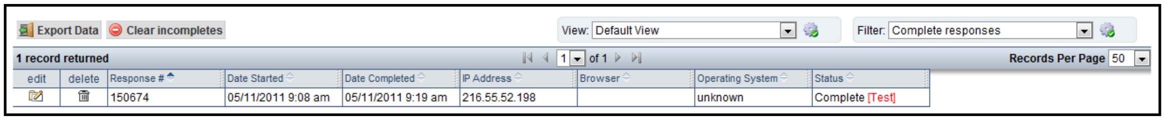
4. How would you rate the technology of this Webcast, including registration and viewing? *

Excellent   Good   Neutral   Fair   Poor

Done

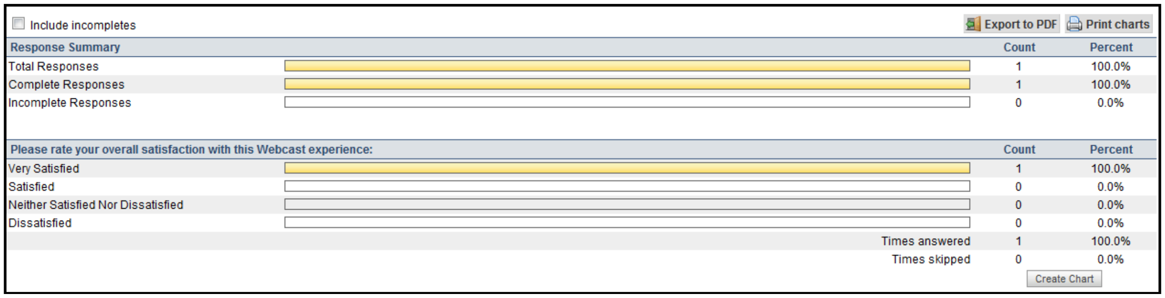
Take Survey Tab: this tab will allow you to test the survey before you send it out to your registrants.

Survey Responses Tab



<u>Survey Responses Tab:</u> in this tab you can see the list of responses to your survey.

Survey Summary Tab



Include incompletes — Export to PDF — Print charts

Response Summary	Count	Percent
Total Responses	1	100.0%
Complete Responses	1	100.0%
Incomplete Responses	0	0.0%

Please rate your overall satisfaction with this Webcast experience:	Count	Percent
Very Satisfied	1	100.0%
Satisfied	0	0.0%
Neither Satisfied Nor Dissatisfied	0	0.0%
Dissatisfied	0	0.0%
Times answered	1	100.0%
Times skipped	0	0.0%

Create Chart

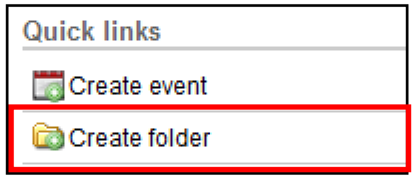
Survey Summary Tab: this tab will give you a summary of the survey results.

QUICK START

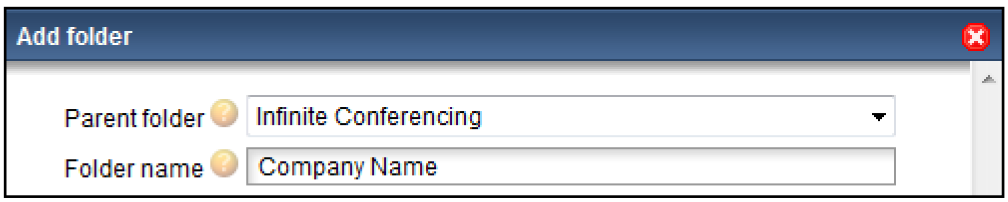
Creating an Event

In order to organize your events you may want to first add a folder.

1. Click on **CREATE FOLDER** (located on the top left hand corner).

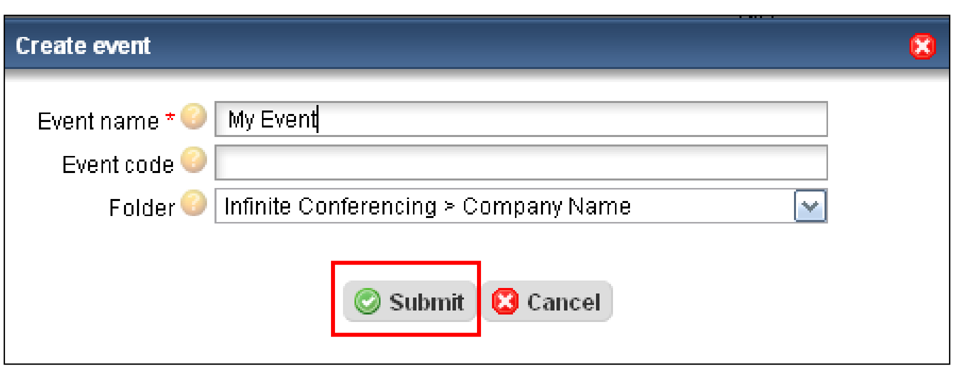


Make sure Parent Folder is your company's name, for example "Infinite Conferencing".

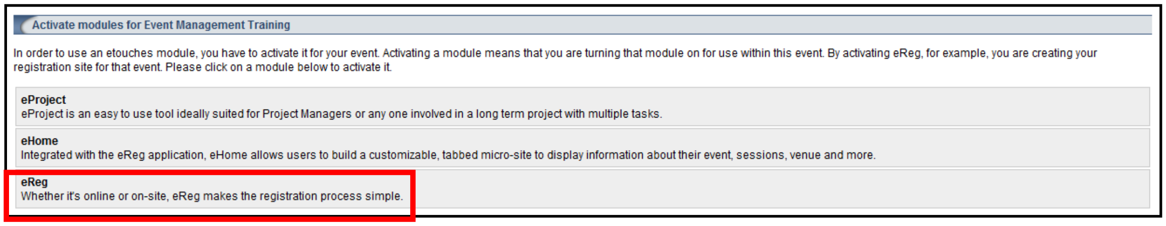


2. Click on **CREATE EVENT** (located on the top left hand corner).

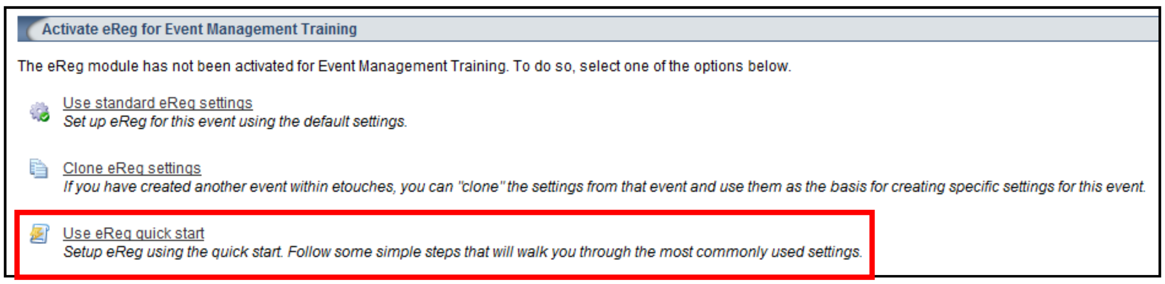
3. A window will appear where you will enter the event name, event code (for your internal purposes) and the folder that you want to place it in. Once you are done, click on **SUBMIT** to create the event.



4. A window where you can activate the registration module will appear. In order to use an etouches module, you have to activate it for your event. Activating a module means that you are turning that module on for use within this event. By activating eReg, for example, you are creating your registration site for that event. Select **eREG**.



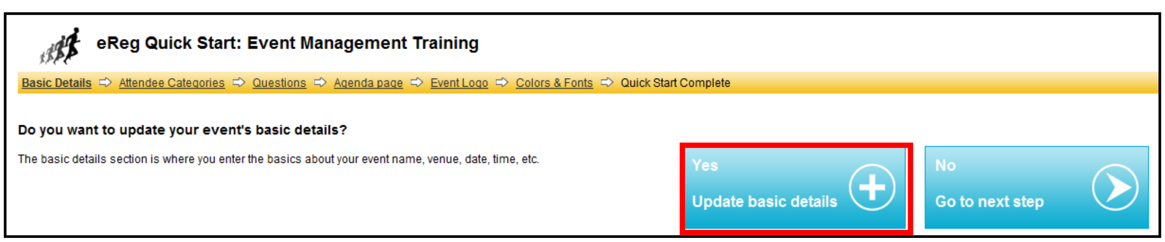
5. After you have selected the eReg module, you will then have three options to activate it. We recommend you use **USE eREG QUICK START** because the system takes you through a few steps to create your registration settings.



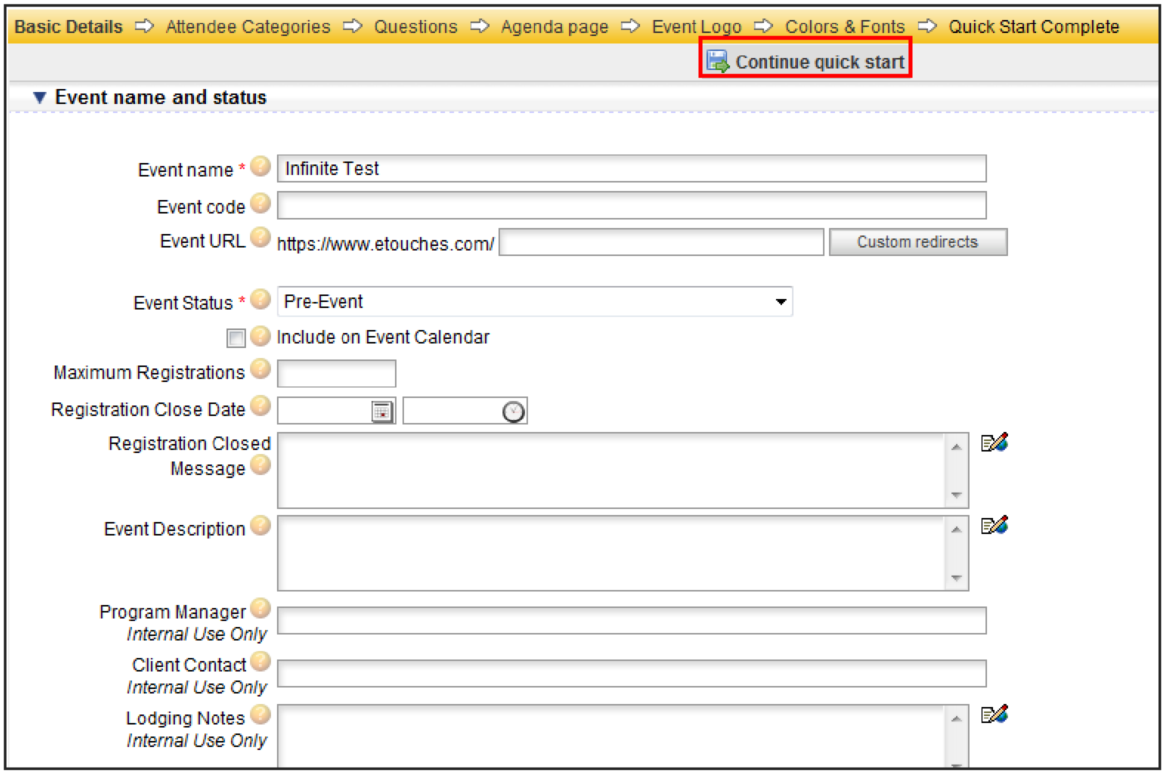
Step 1: Basic Details

The quick start guide will open up and you can follow the steps as they appear.

1. First you may want to add the basic details of the event, if so then click on the **YES UPDATE BASIC DETAILS** button. If you want to skip to the next step then, click on the **NO GO TO NEXT STOP** button.

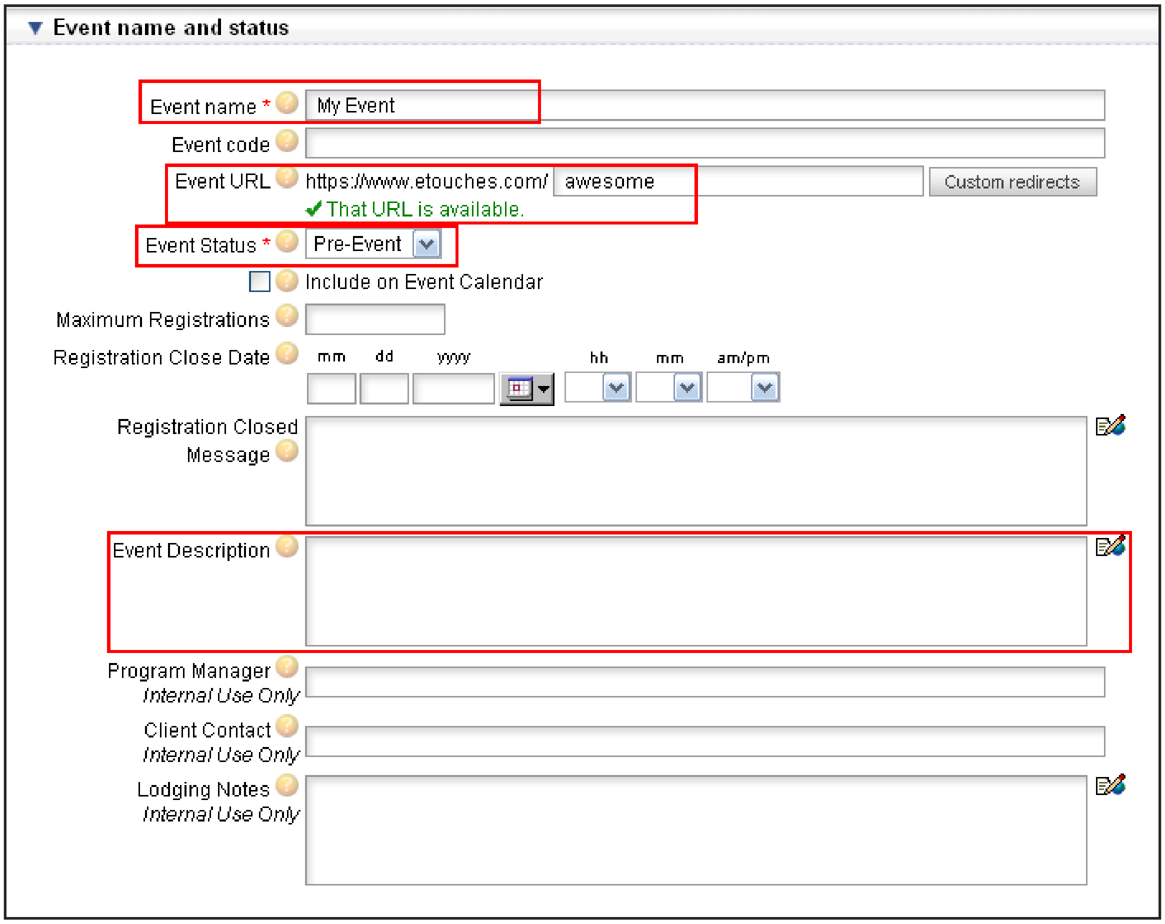


2. When you click on **YES**, then you will open up a screen where you can insert all the information you choose. Once you are done with this portion, you can click on **CONTINUE QUICK START**.



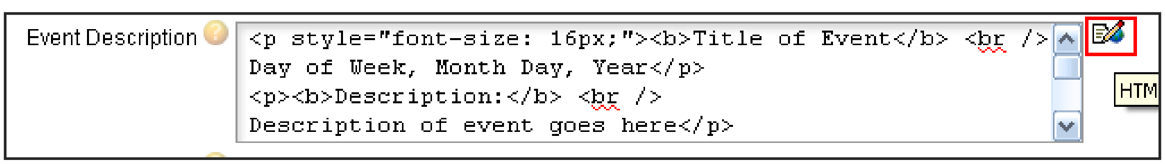
NOTE: The highlighted fields are the ones you will be filling in most of the time.

- **Event name**
- **Event URL** (custom URL that describes the name of event or company)
- **Event Status** (always in Pre-Event until you go Live)

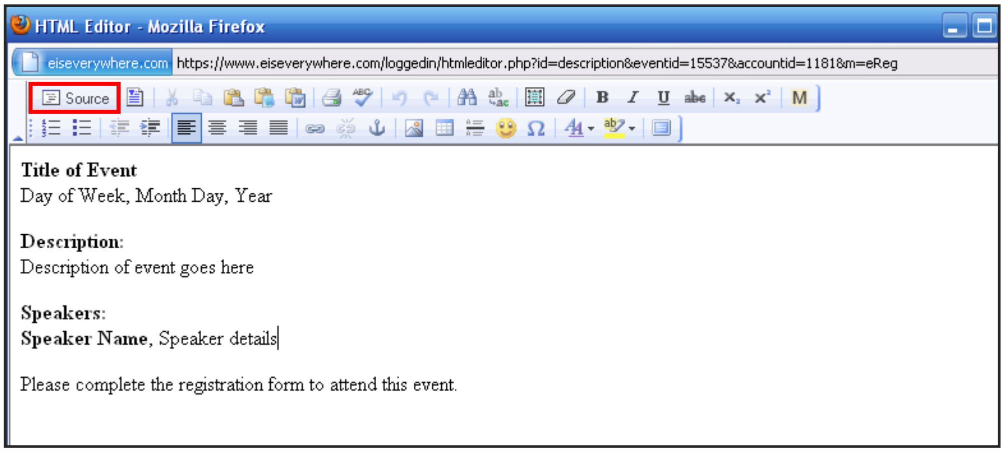


- **Event Description** (option do create it through HTML)

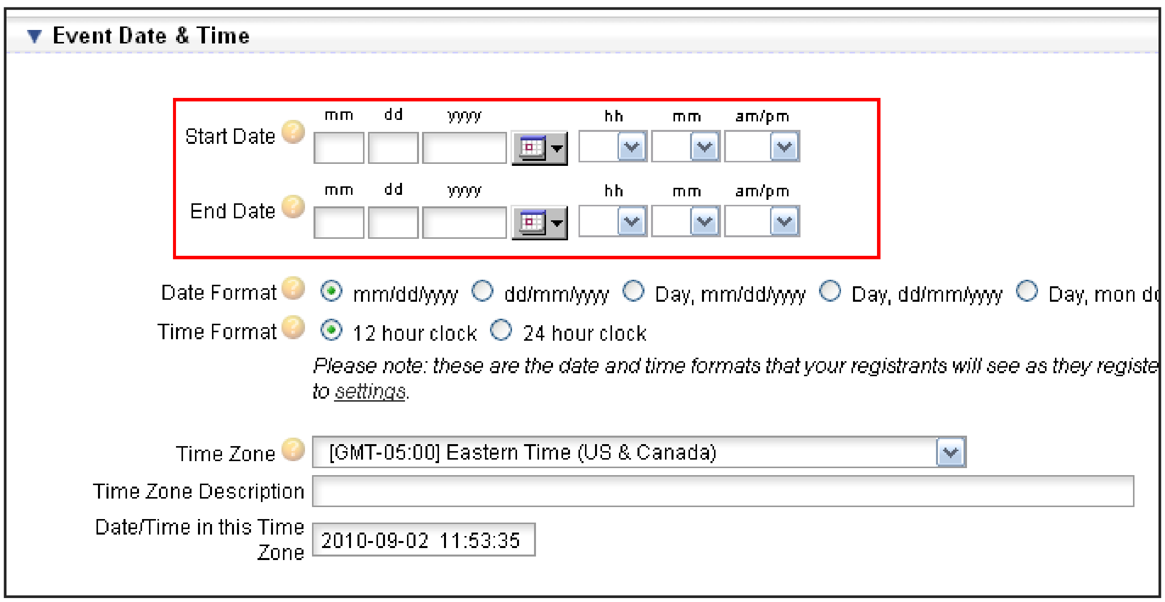
- Click HTML editor in right corner to open up the HTML Editor window.



- Edit in this window. If you need to edit the html source code, click the ‘Source’ button.

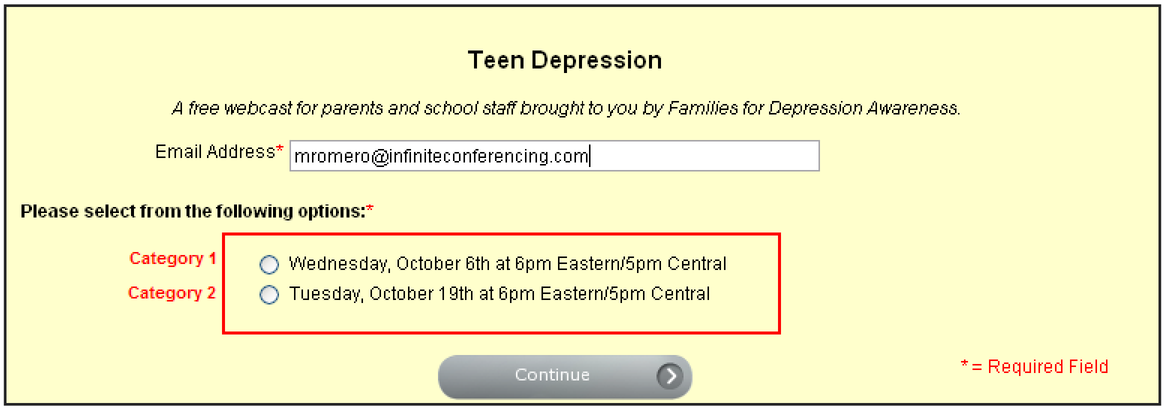


- **Event Date &Time** (unless there will be multiple events they will be registering for)

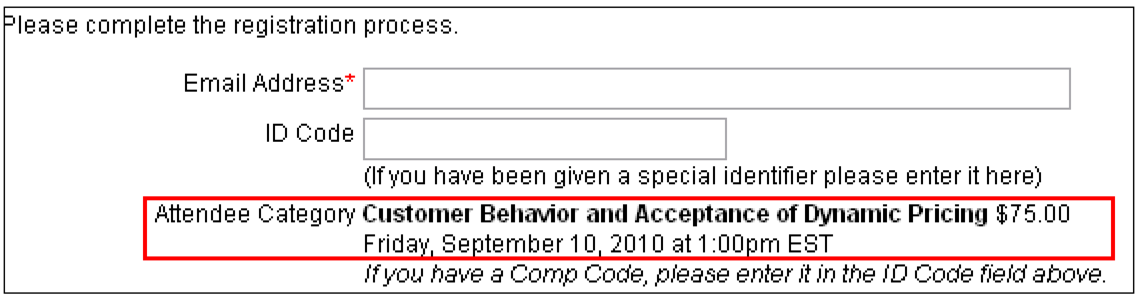


Step 2: Attendee Categories

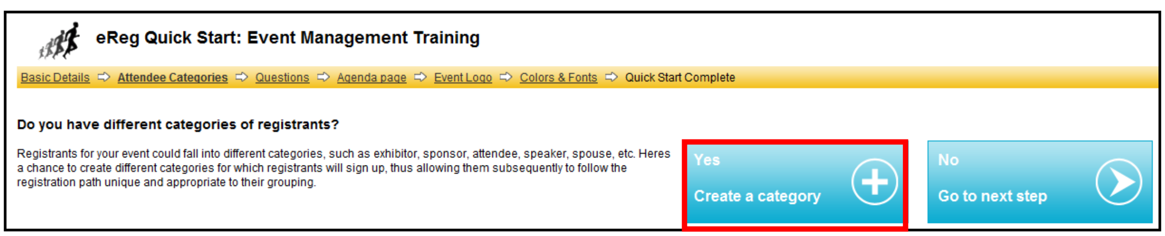
Registrants for your event could fall into different categories, such as exhibitor, sponsor, attendee, speaker, spouse, etc. Here is the chance to create different categories for which registrants will sign up, thus allowing them subsequently to follow the registration path unique and appropriate to their grouping. You may need to add categories if this registration is for multiple events (i.e. the same event on the same day but at two different times; or like the example below the same event on October 6th and on October 19th.)



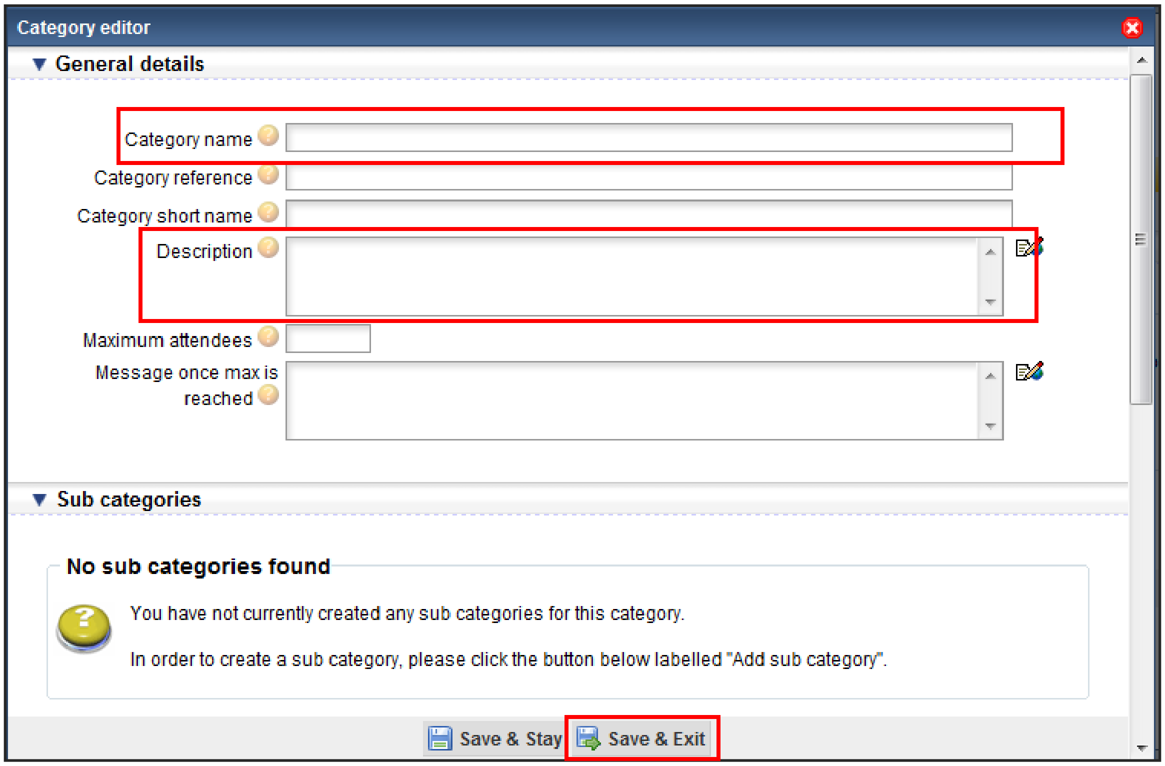
You also may need to add a category if people need to pay to register.



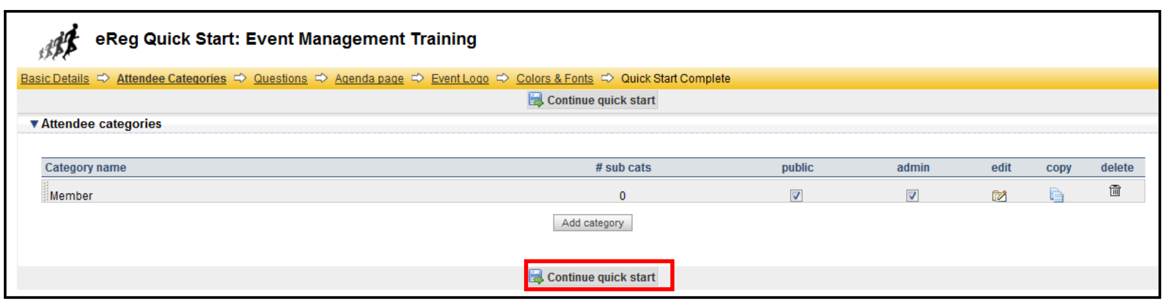
1. Click on **YES CREATE CATEGORY** if you would like to create category(s) for your event. Click on **NO GO TO NEXT STEP** if you do not have to create a category.



2. The category editor screen will appear where you can add the category name and description (usually you do not have to fill in other fields). If applicable, add a sub-category using the same method. When you are done creating your categories click **SAVE & EXIT**.



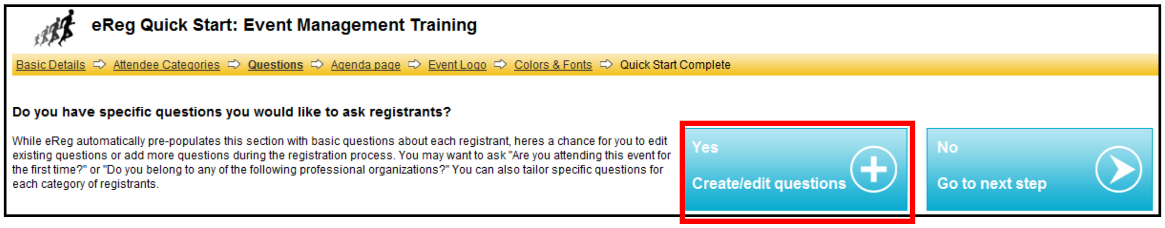
3. You will see the list of your created categories and you can continue with the quick start by clicking **CONTINUE QUICK START**.



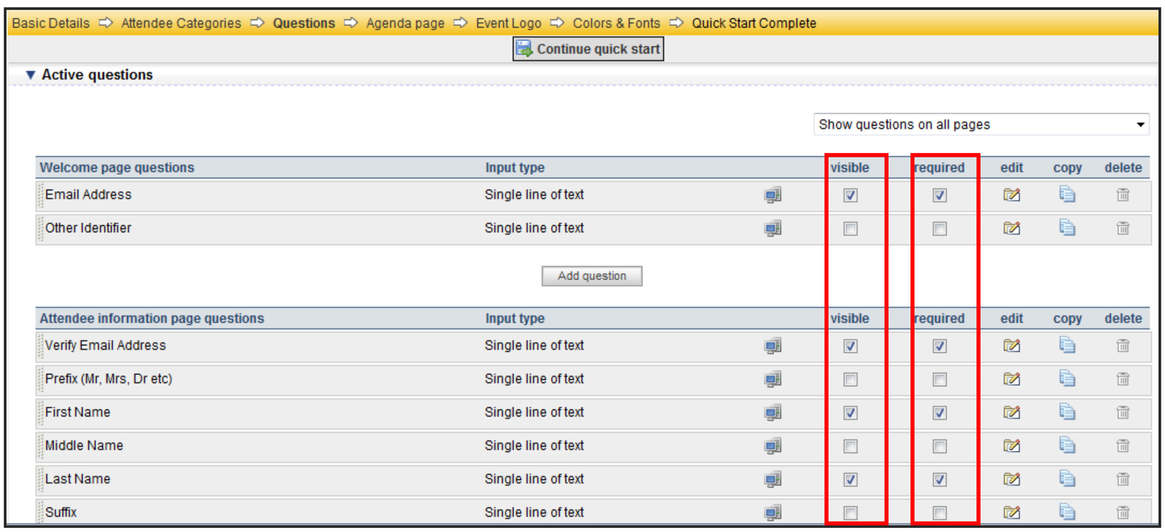
Step 3: Questions

While eReg automatically pre-populates this section with basic questions about each registrant, here is a chance for you to edit existing questions or add more questions during the registration process. You may want to ask "Are you attending this event for the first time?" or "Do you belong to any of the following professional organizations?" You can also tailor specific questions for each category of registrants.

1. Click on **YES CREATE/EDIT QUESTIONS** if you would like to create category(s) for your event. Click on **NO GO TO NEXT STEP** if you do not have to create a category.



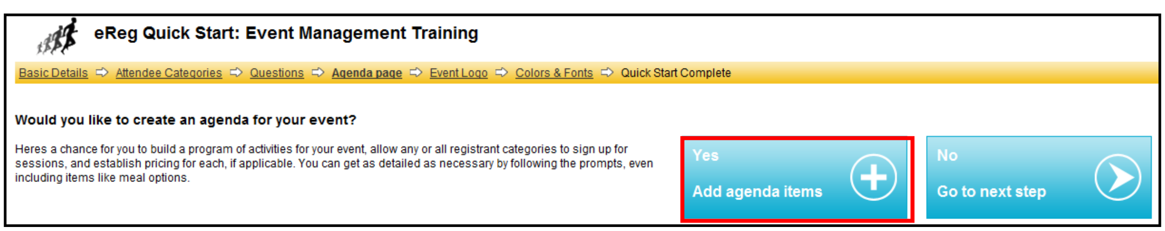
2. The active questions screen will appear where you can select the questions that will appear on the Welcome Page and on the Attendee Information Page. Under the “Visible” column, check the boxes of the information you want to collect. Check the “Required” box if it is required. You can also easily copy, edit and create new questions. Once you are done, click on **CONTINUE QUICK START** for the next step.



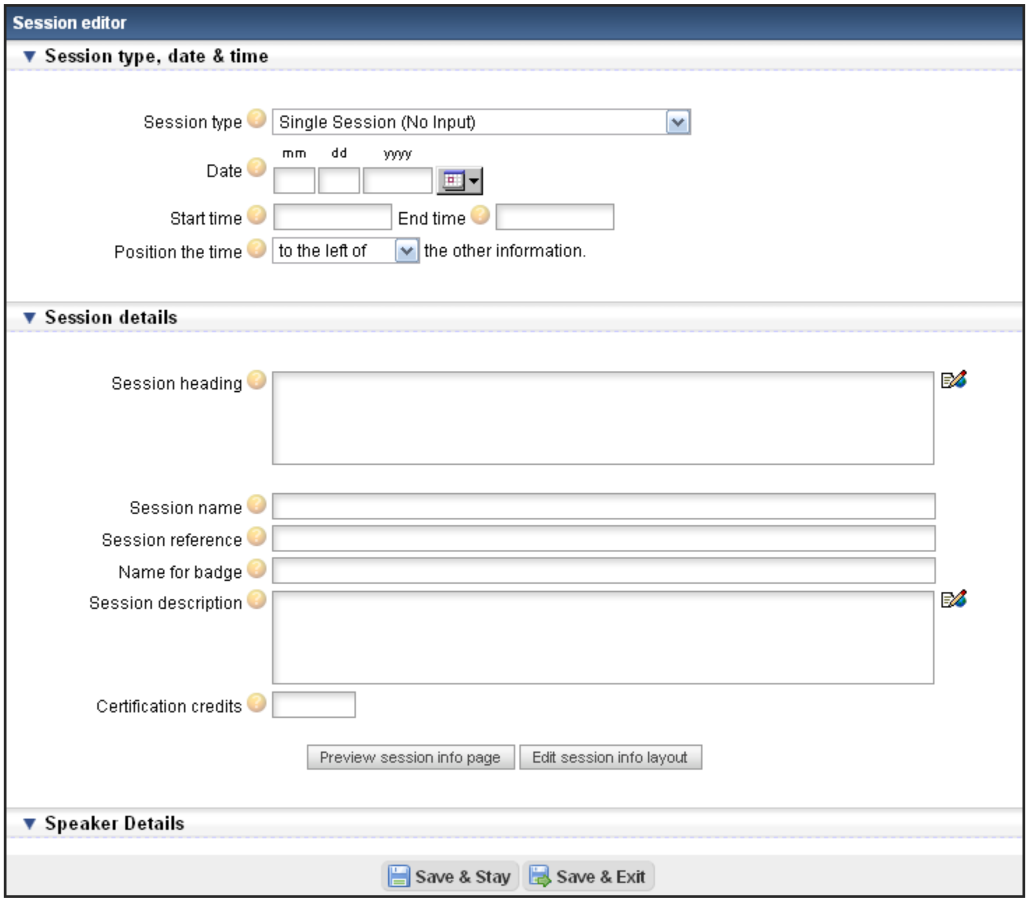
Step 4: Agenda Page

Here you can build a program of activities for your event, allow any or all registrant categories to sign up for sessions, and establish pricing for each, if applicable.

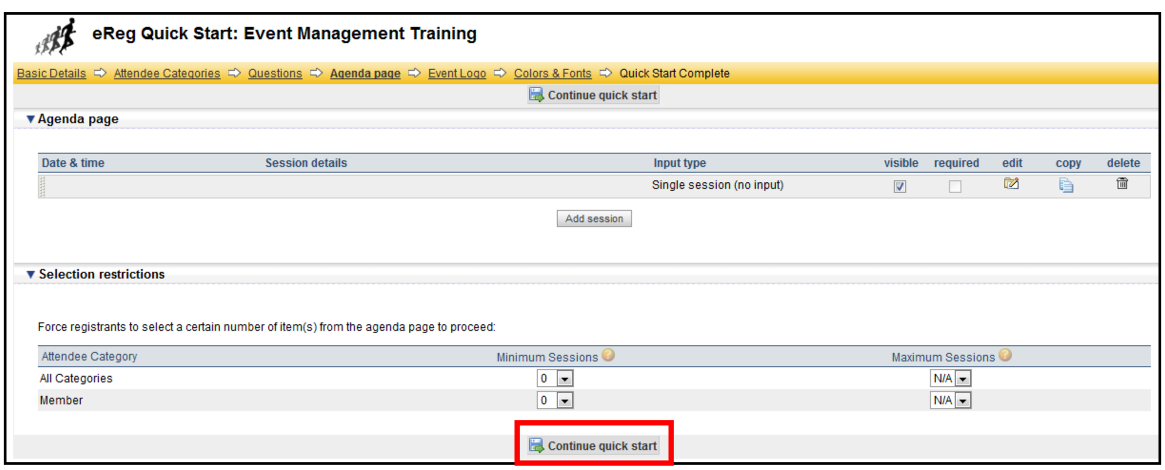
1. Click **YES ADD AGENDA ITEMS** to create sessions or **NO GO TO NEXT STEP** to skip this step.



2. Add all details regarding the session (description, speakers, credits, etc) and click on **SAVE & EXIT**.



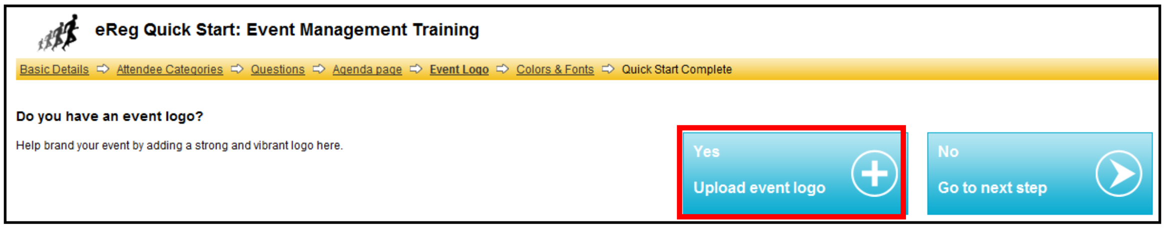
3. You will see the list of your created sessions and you can continue with the quick start by clicking **CONTINUE QUICK START**.



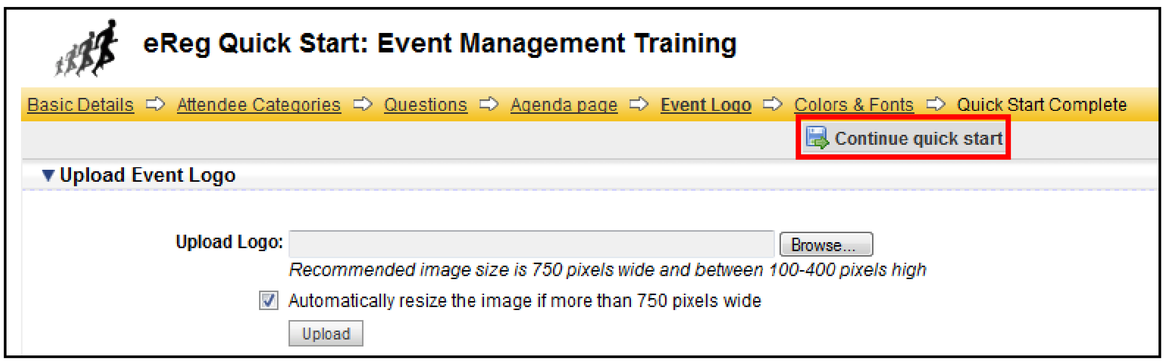
Step 5: Event Logo

Brand your event by adding your company logo here. You may have to edit and resize the logo to fit in an image that is 750 pixels wide.

1. Click the **YES UPLOAD EVENT LOGO** button to upload your event logo or **NO GO TO NEXT STEP** to skip this step.



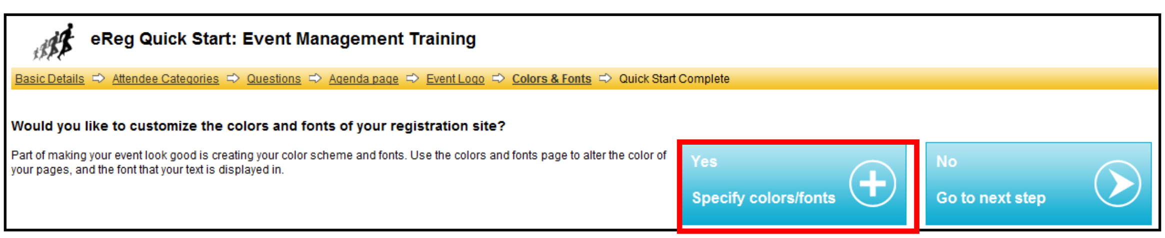
2. Browse for your logo and click **UPLOAD** when you are ready. Click on **CONTINUE QUICK START** when you are done.



Step 6: Colors & Fonts

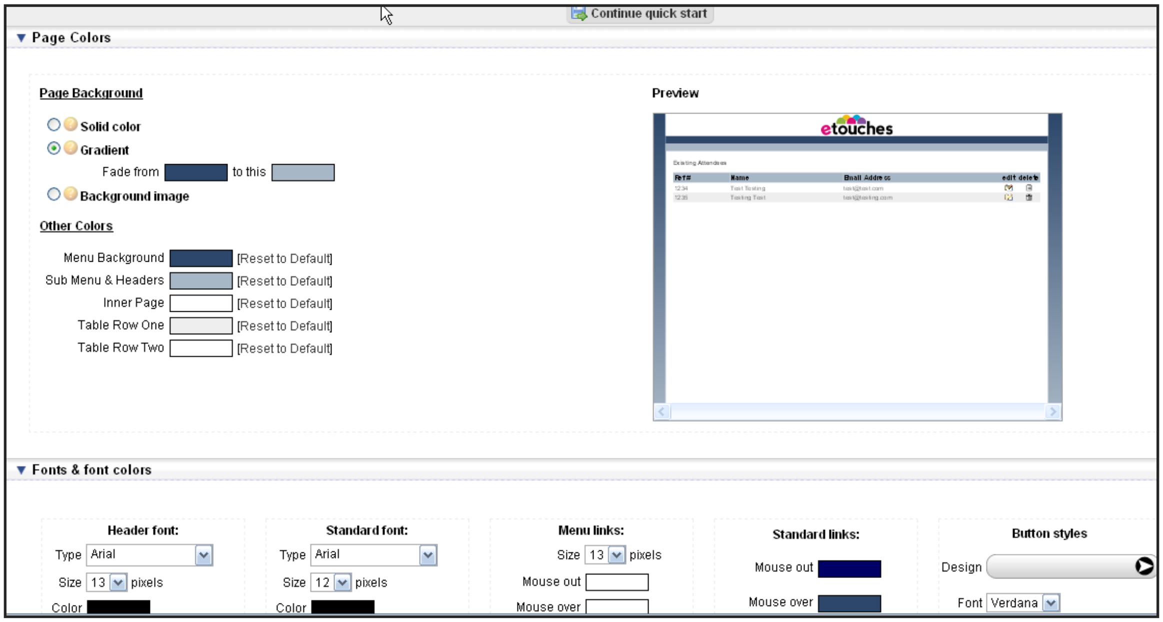
Part of making your event look good is creating your color scheme and fonts to match the company's look. Use the colors and fonts page to alter the color of your pages, and the font that your text is displayed in.

1. Click the **YES UPLOAD EVENT LOGO** button to upload your event logo or **NO GO TO NEXT STEP** to skip this step.

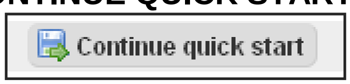


2. Most of the time the fonts can be left as is. The colors you will usually be changing are:

- **Page background:** select if solid color, gradient or background image (for background image, you may have to pull from company's website)
- **Menu Background**
- **Sub Menu & Headers**

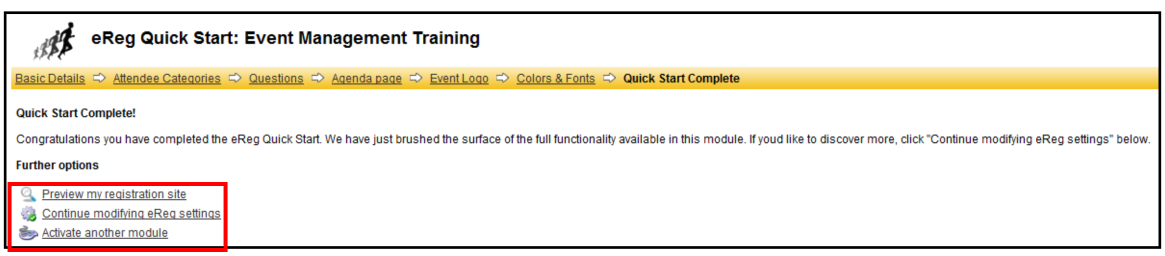


3. When you are done click **CONTINUE QUICK START**.



Final Step: Quick Start Complete

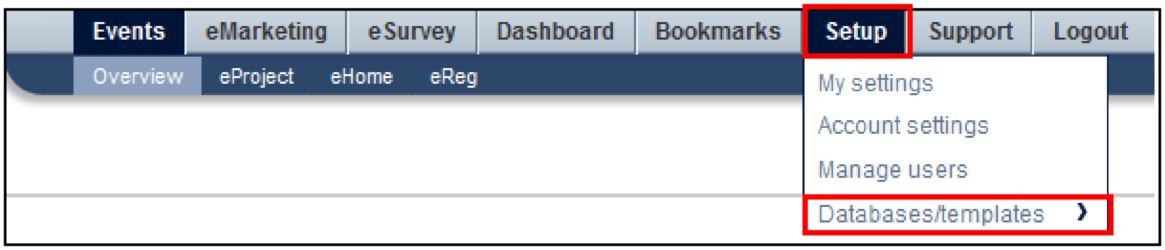
This completes the Quick Start setup. You will have a few options: preview the registration site, continue modifying eReg settings, or activate another module.



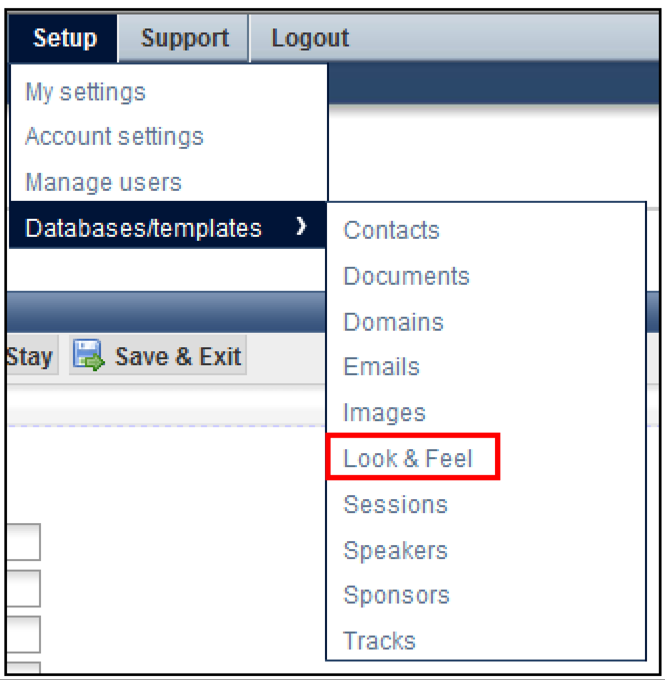
Creating a New Look & Feel Template

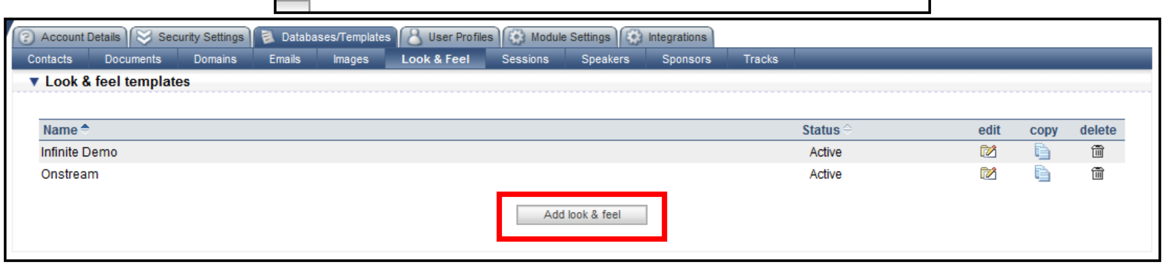
In order to add templates on the "Look & Feel" tab, you will need to create them.

1. Click on **SETUP → DATABASES/TEMPLATES**.

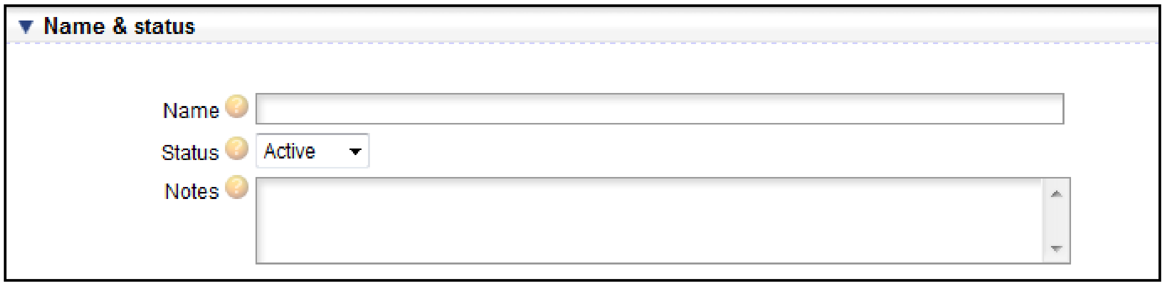


2. Click on the **LOOK & FEEL** option from the drop down menu and click on the **ADD LOOK & FEEL** button.



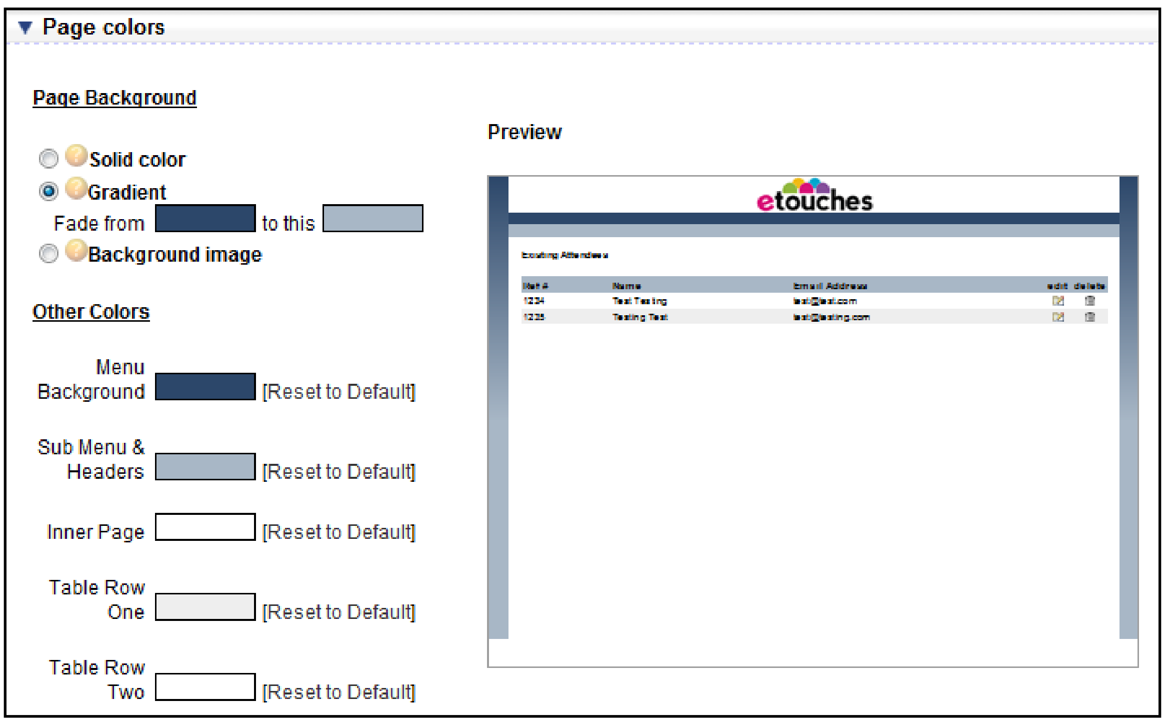


3. Fill out the **Name & Status** section.



- **Name:** input the name of the template here, this will help you identify your template so be sure to use a unique name.
- **Status:** use the dropdown box to select the status of your template. The options include - active and inactive. If you plan to use the template be sure you use the active status.
- **Notes:** input any notes regarding your template here, any notes entered here are for internal purposes only.

4. Fill out the **Page Colors** section.

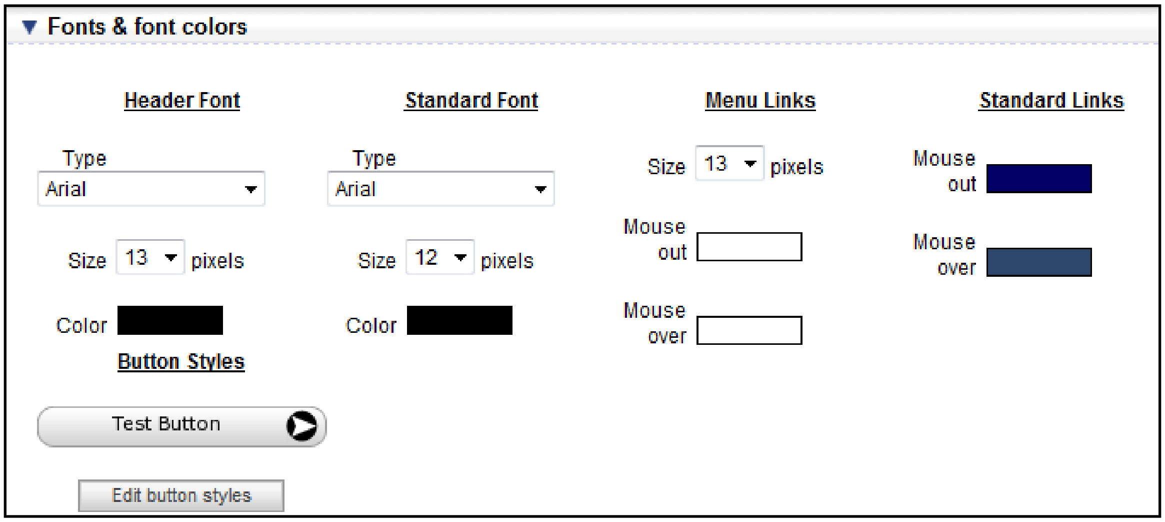


- **Solid Color:** this option makes your background one solid color, but you then have the option to add a drop shadow to the main table.
- **Gradient:** this option makes your background a gradient which is one color fading into another color. You can choose the two colors to use in your gradient.
- **Background Image:** if you want to use an image as a background instead of the other options then select this option. You will then have to choose

the image from the image database. Depending on the size of the image, it will overlap throughout the page.

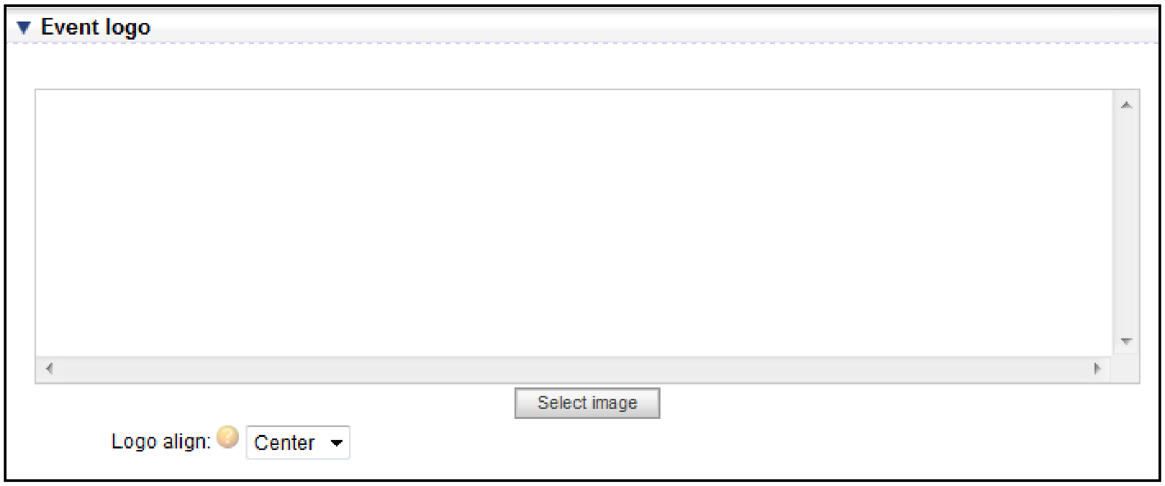
- **Other Colors:** the other colors section has five more options for colors that deal with the inner page. You can change the colors by clicking on the color itself to change it or by clicking the “Reset to Default” link to the right of the color.

5. Fill out the **Fonts & Font Colors** section.



- **Header Font:** change the header font by using the dropdown boxes for the type and size, and click the color box to change the color of the font.
- **Standard Font:** change the standard font by using the dropdown boxes for the type and size, and click the color box to change the color of the font.
- **Button Font:** you can change the button font by using the dropdown box and selecting a new font type.
- **Menu Links:** use the dropdown box to change the size of the menu links and you can also click on the color boxes to change the color of the font when you mouse is over the link.
- **Standard Links:** you can click on the color boxes to change the color of the standard links when the mouse is over the link.

6. Fill out the **Event Logo** section.

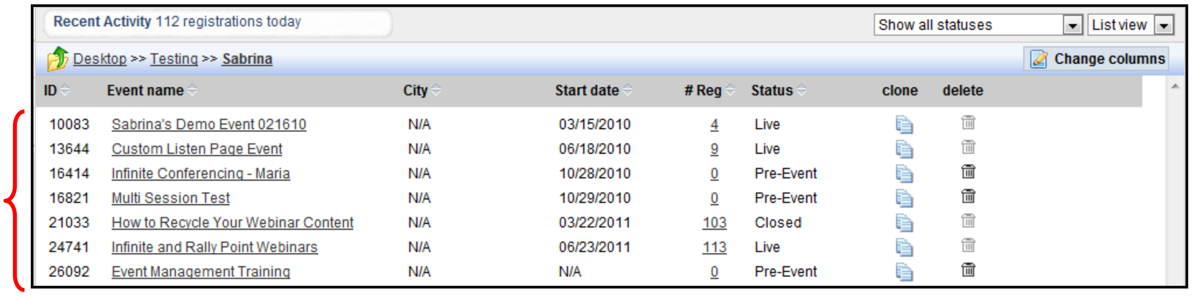


- **Select Image:** Click the button labeled “Select Image” to select an image from your image database. Then search for the image in the database and select it. This will then display the image in the empty field with the option to remove the image.
- **Logo Align:** Once you selected an image to use as your event logo you can change the alignment of your logo by using the dropdown box and selecting either - center, left, or right.

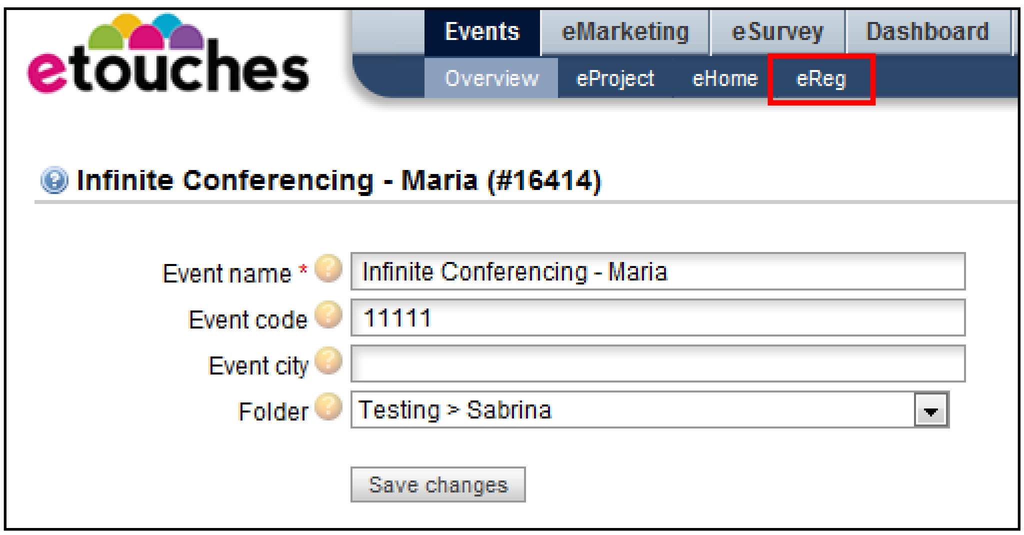
Creating Emails through eReg

(Emails are specific to the event)

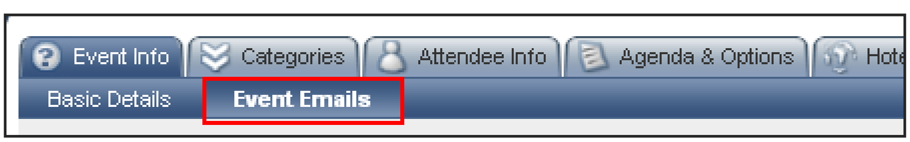
1. Click on your event.



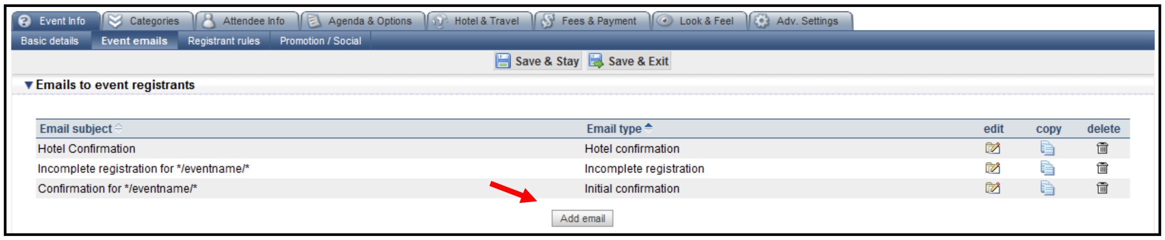
2. Click on **eREG**.



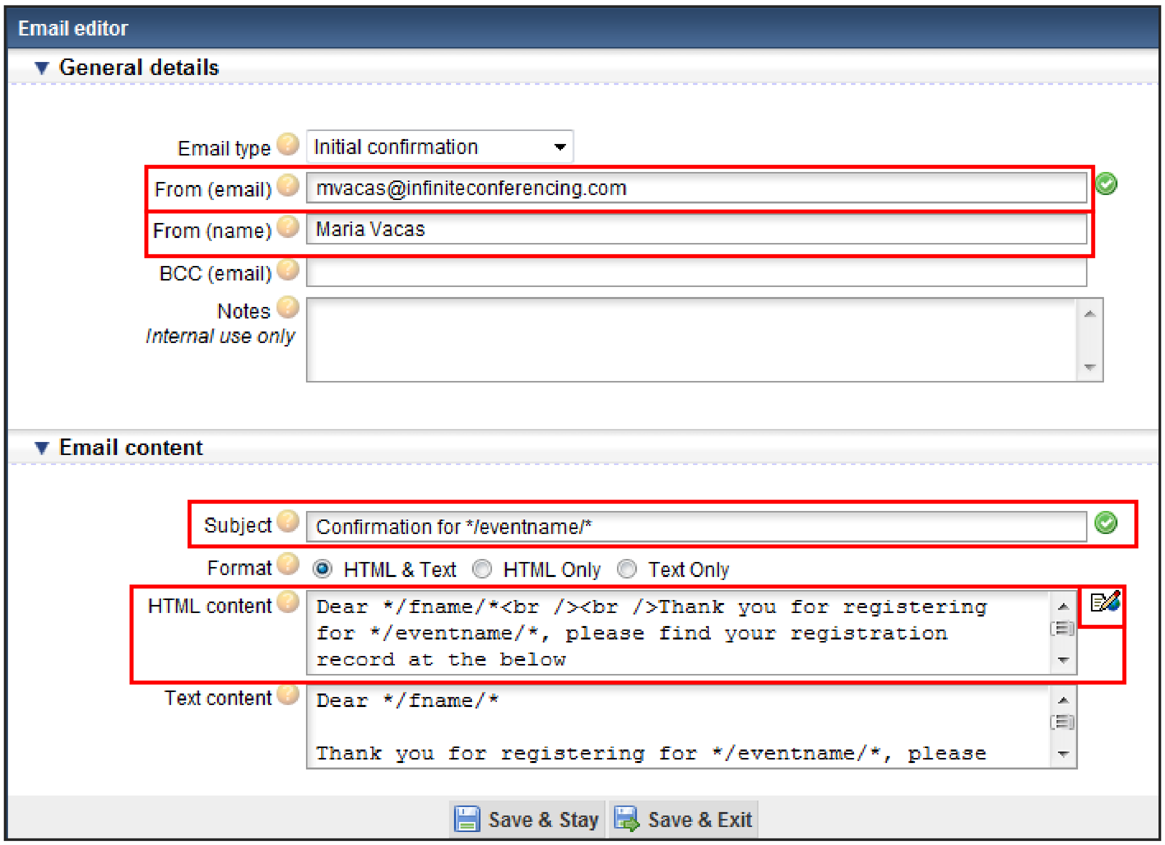
3. Go to **EVENT EMAILS TAB** under the Event Info tab.



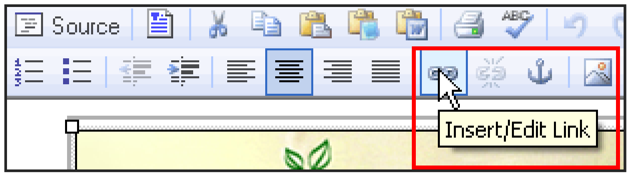
4. Click on the following **ADD EMAIL** to add an email such as your confirmation email, thank you email, etc.

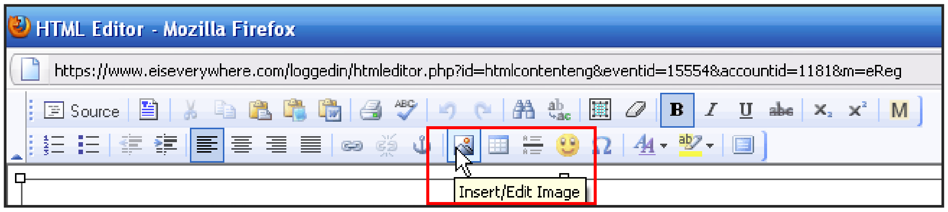


5. The email editor window will appear where you can insert your information.

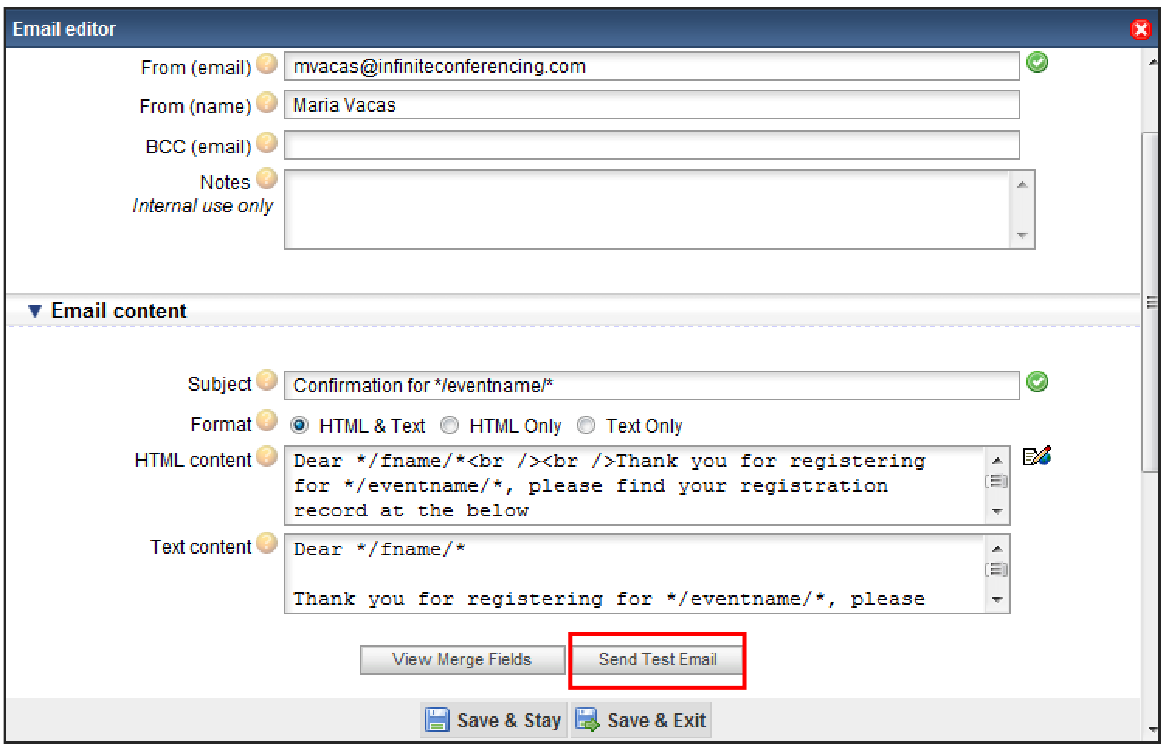


- **From (email):** You can change this or keep the same if you would like.
- **From (name):** You can change this to your company name or keep the same if you would like.
- **Subject:** You can change this or keep the same if you would like.
- **HTML content:** This is where you should insert the HTML version of your email. Click the button on the right corner to open the HTML Editor. You may want to include the date of the event, add the event URL link by using the **INSERT/EDIT LINK** button, insert a top banner image by using the **INSERT/EDIT IMAGE** button, dial-in numbers (if necessary), and entry codes (if necessary).

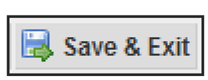




6. Once you are done creating your email, you can test it out by clicking on the **SEND TEST EMAIL** button. You can find it when you start scrolling down the Email Editor screen.



7. When you are completely satisfied with your email, you can click on the **SAVE & EXIT** button.



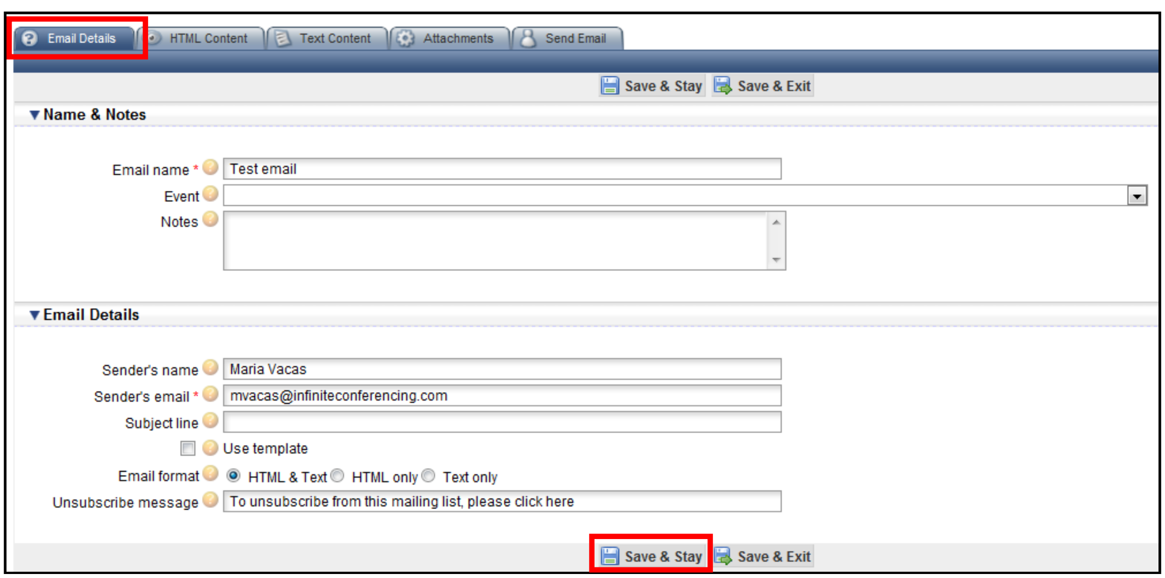
Creating Emails through eMarketing

1. Click on **eMARKETING** to start creating your email.

2. Select the **CREATE NEW EMAIL** button.

3. Enter the “Email Name”, and select the folder where you want to save that email from the drop down menu. Once you are done, click on **SUBMIT**.

4. Enter the email details by using the **EMAIL DETAILS TAB**. This is where general information about your email is displayed. You can also add notes, change the sender’s information, subject line, and the email type. Once you are done, click on **SAVE & STAY**.



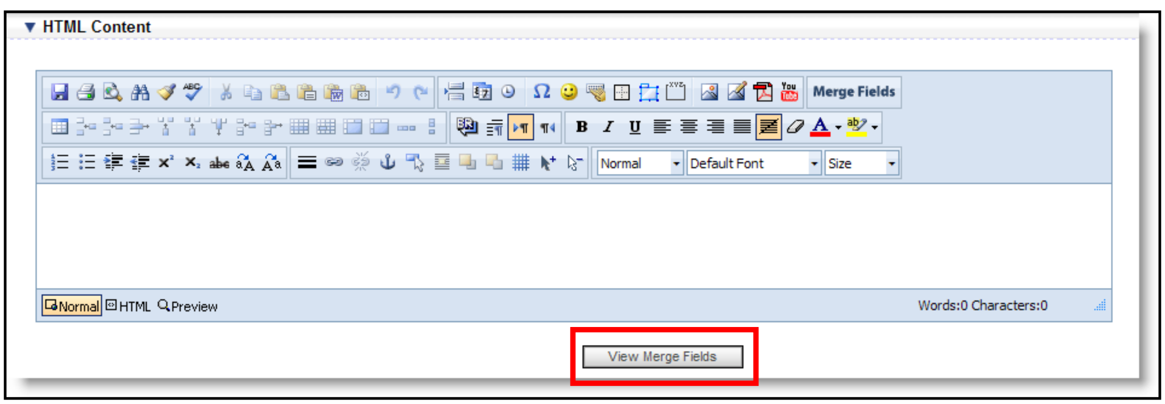
Name & Notes: in this section you can change the name of your email, assign it to an event, and add internal notes.

- ***Email name:*** this is where the name of your email will appear.
- ***Event:*** if you want to assign this email to an event, select that event from the dropdown box.
- ***Notes:*** add any notes associated with the email here. Notes are for internal purposes only.

Email Details: you can edit the email details in this section, you also have the ability to choose a template for your email, and select your email type.

- ***Sender's Name:*** input the name of the person that the email is coming from.
- ***Sender's Email:*** input the email address that the email will be coming from.
- ***Subject Line:*** place the subject line that you would like your attendees to view for this email here.
- ***Use Template:*** if you have preloaded a template, then you can check this box which will eliminate the option to choose from email types. If you choose to use a template, the tabs at the top of the page will change, replacing the HTML and text tabs with the template tab.
- ***Email Types*****:** if you choose not to use a template, you can select from one of the email types available; HTML & Text, HTML Only, or Text Only
- ***Unsubscribe Message:*** this text will appear at the bottom of your email allowing your recipients to unsubscribe from the mailing list. You can edit the verbiage by deleting the current text and adding your own.

5. Enter the HTML content by using the **HTML CONTENT TAB**.



HTML Content: in this section you can insert the HTML content that you want in your email. The HTML editor functions the same way as the HTML editor in eReg. You can also insert merge fields into your HTML content. A merge field is a code that pulls information from a specific field that may be subjective to different registrants, such as company or name. See below for details. Once you are done, click on the **SAVE & STAY** button.

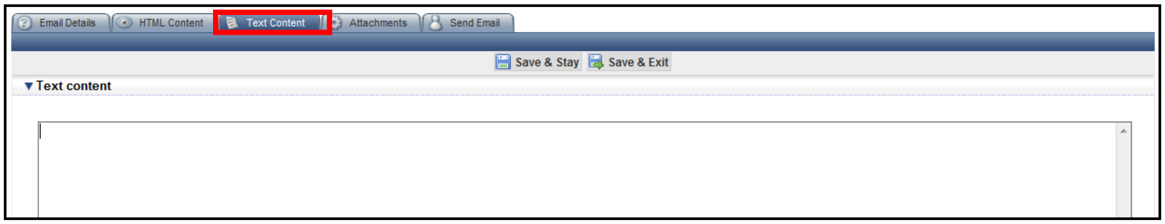
View Merge Fields: if you choose to add a merge field to your email, click the button labeled **VIEW MERGE FIELDS** located at the bottom right of the page. Once you click this button a small window will open that looks like the screen shot below. Locate the merge field that you want to insert into your HTML content. Then highlight it and copy the text. Once you have done this go back to your HTML content and paste the text where you want it to appear within your email.

Available Merge Fields

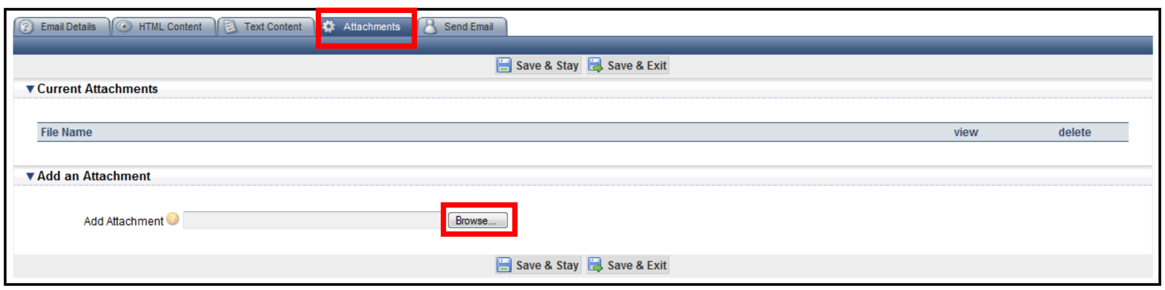
▼ Subscriber Merge Fields

/address1/	Address Line 1
/address2/	Address Line 2
/address3/	Address Line 3
/ccemail/	cc email
/city/	City
/company/	Company
/country/	Country
/email/	Email Address
/ext/	Extension
/fax/	Fax
/fname/	First Name
/lname/	Last Name
/mname/	Middle Name
/mphone/	Mobile Phone
/nonusstate/	State/County/Province (Non-US)
/other_id/	Other Identifier
/prefix/	Prefix (Mr, Mrs, Dr etc)
/skype_twitter_im/	Skype/IM/Twitter ID
/state/	US State
/suffix/	Suffix
/title/	Job Title
/wphone/	Work Phone
/zip/	Zip (Postal Code)

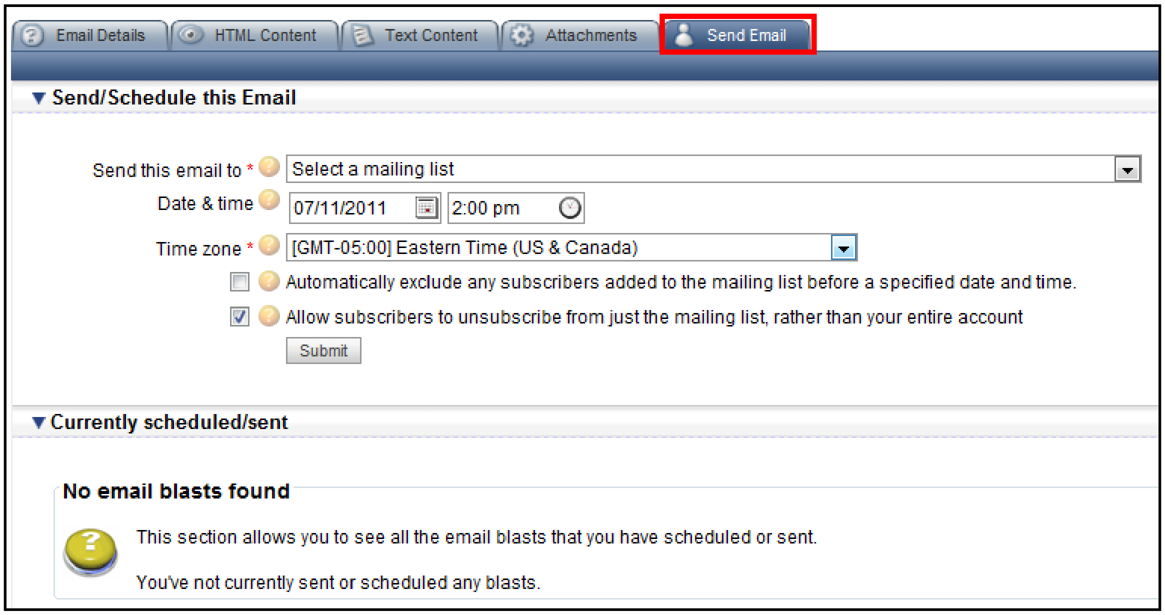
6. Enter the text content by using the **TEXT CONTENT TAB**. In this section you should input the text that your recipient will see if their email browser does not automatically display HTML content within an email. Text content will always be shown, but items in HTML content such as images, or links may not be visible.



7. Add attachments to your email by using the **ATTACHMENTS TAB**. If you choose to add an attachment you will have to browse your computer for the file you want by clicking the **BROWSE** button in the “Add an Attachment” section. Once you have located the proper field, and opened it to upload your document you then can click on the **SAVE & STAY** button towards the bottom of the page. This will complete the upload and you will now see the file in the “Current Attachments” sections. To view an uploaded document, click the view icon to the right of the document name. You can delete an uploaded document by clicking the trash icon located to the right of the document name.



8. Once you have created a mailing list and have completed the setup of your email you will visit the **SEND EMAIL TAB**. On this tab you will have the ability to choose the mailing list you would like to send the email to as well as a particular date, time, and specify the time zone.

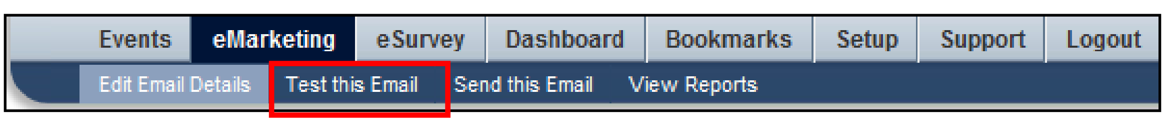


Send/Schedule this Email:

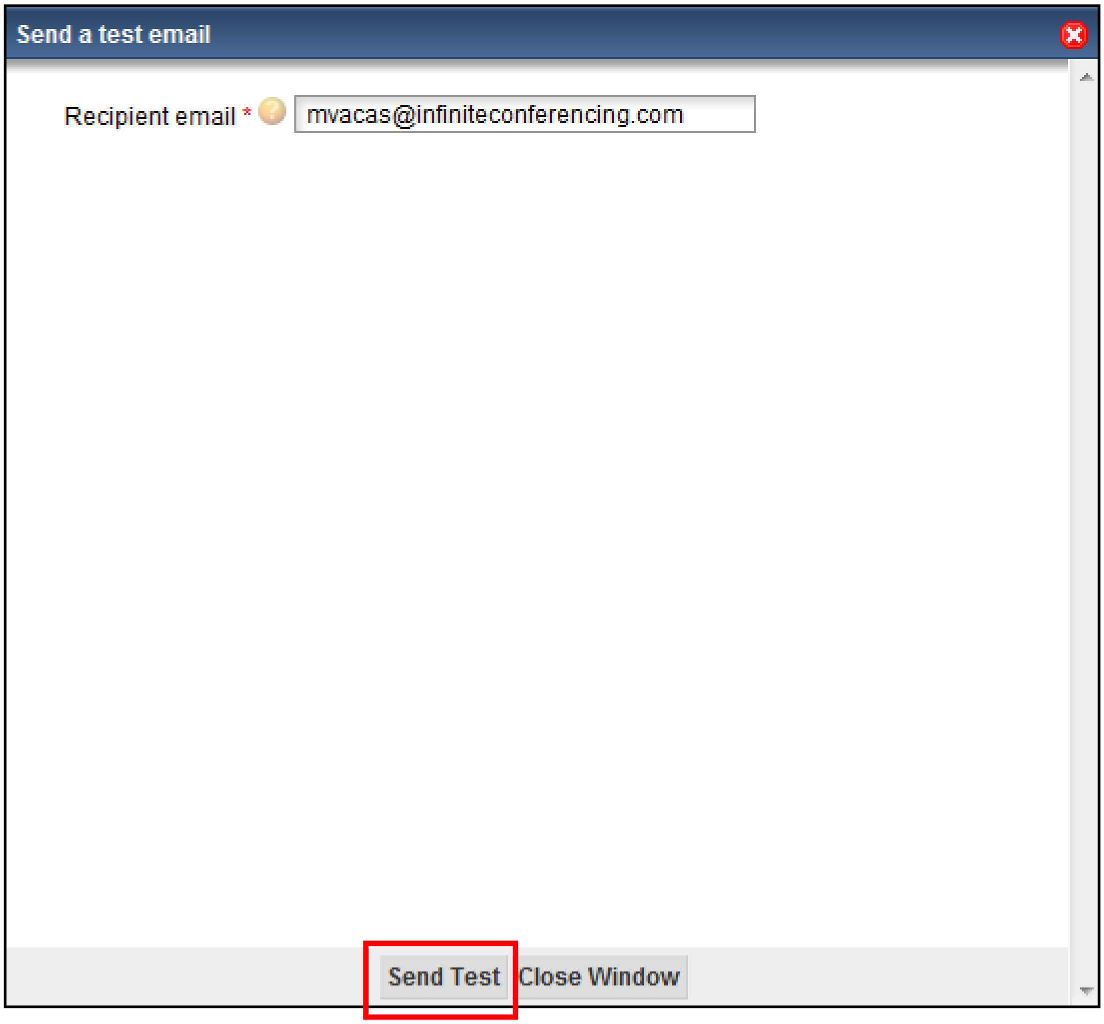
- ***Sent this email to:*** here you can select the mailing list that you want to send this email to. If you want to send this email to multiple mailing lists you can revisit this page and choose a different mailing list and resend the email.
- ***Date & Time:*** here you will select the Date & Time that you want the email to be sent.
- ***Time Zone:*** here you will select the time zone you are using to specify the date & time of sending.
- ***Checkbox 1:*** check this box if you want to exclude sending the email to anyone on the mailing list who is already registered for the event associated with the email.
- ***Checkbox 2:*** check this box if you want to give your registrants the option to unsubscribe from the mailing list only instead of the entire account.

Currently Scheduled/ Sent Emails: in this section you can preview scheduled or sent emails as well as the mailing list, date, time, status, and sending progress associated with them. You can also choose to edit or delete a scheduled email.

9. Click on **TEST THIS EMAIL** button to test to send a test email to yourself.



10. Enter the email that you want to send this email to as a test and click on **SEND TEST** once you are done.


Send a test email
Recipient email *
mvacas@infiniteconferencing.com
Send Test
Close Window

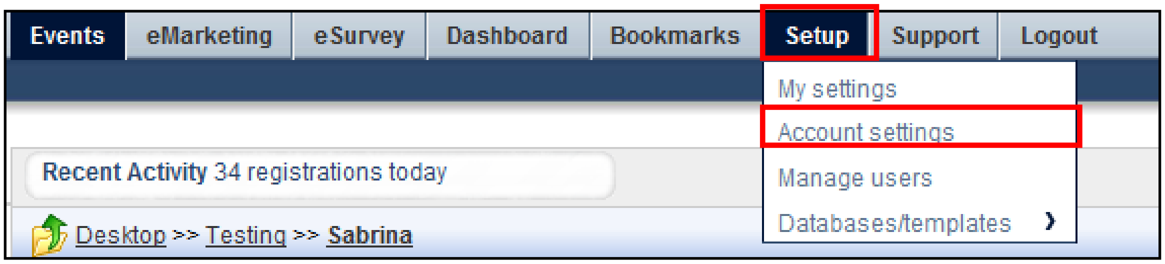
Setting up Payment Gateway and Fees

Step 1: Create a Payment Gateway

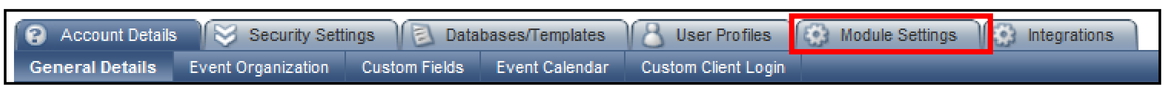
First, you need to create a payment gateway in the system so that you can accept payments from your registrants.

NOTE: You can have more than one payment gateway if you would like.

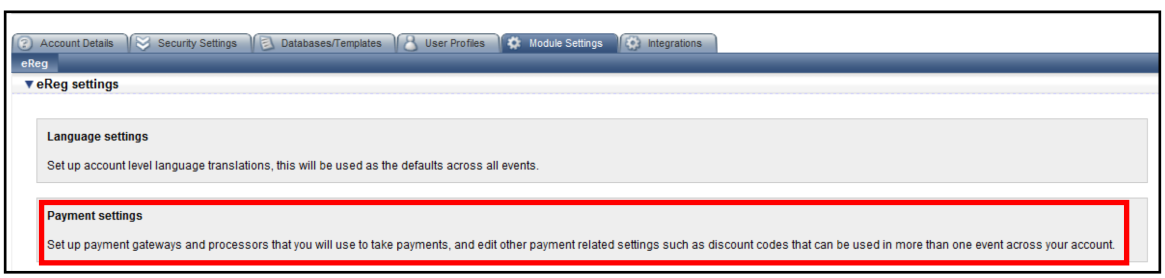
1. Click on the **SET UP TAB**.



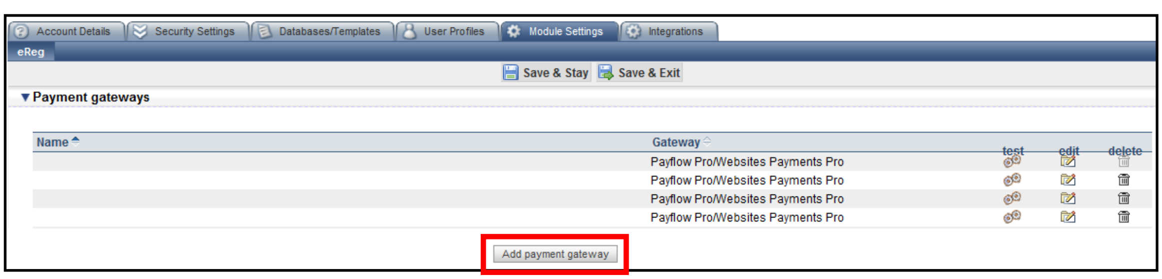
2. Click on the **MODULE SETTINGS TAB**.



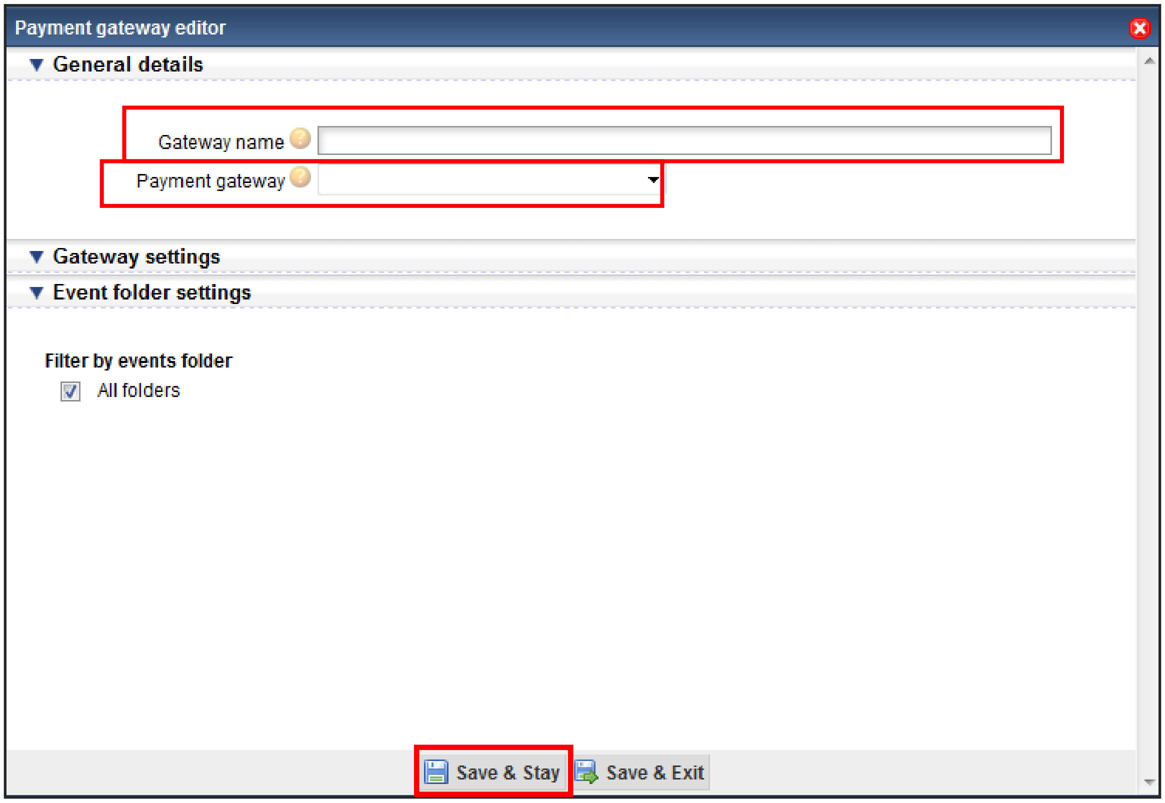
3. Click on the **PAYMENT SETTINGS** option.



4. You can add your payment gateway by clicking on the **ADD PAYMENT GATEWAY** button.

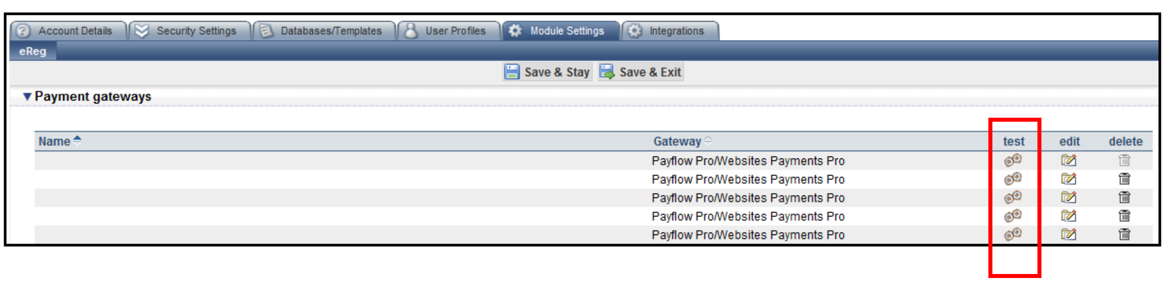


5. The payment gateway editor window will appear where you will be able to add the “Gateway Name” and select a “Payment Gateway” from the drop down menu.

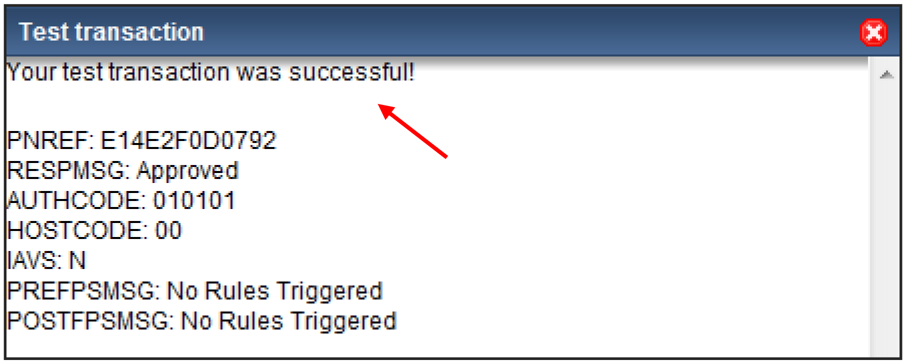


6. Once you select your payment gateway, the appropriate “Gateway Settings” will appear down below. Depending on the gateway you choose, the processor will determine the details that you will need to input. Contact your payment gateway provider to obtain this information. Once you are done, you can select **SAVE & EXIT**.

7. You can check to see if the payment gateway has been set up correctly by clicking the test icon next to the appropriate gateway.



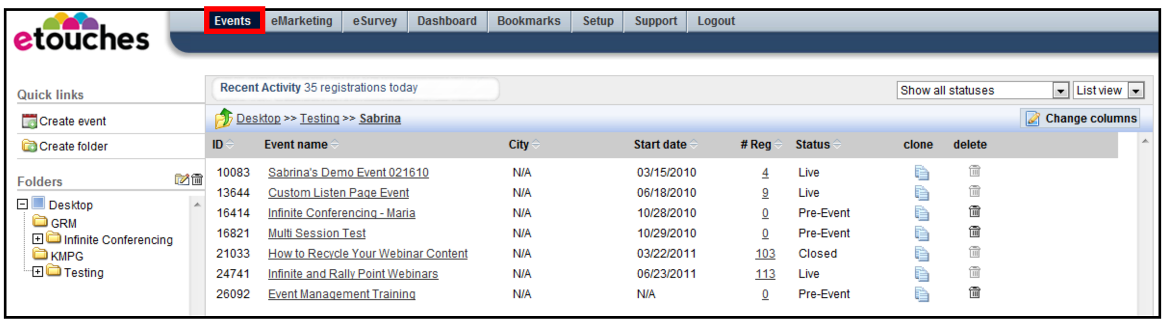
8. If the payment gateway has been set up correctly, then it will give you a message that says “Your test transaction was successful”.



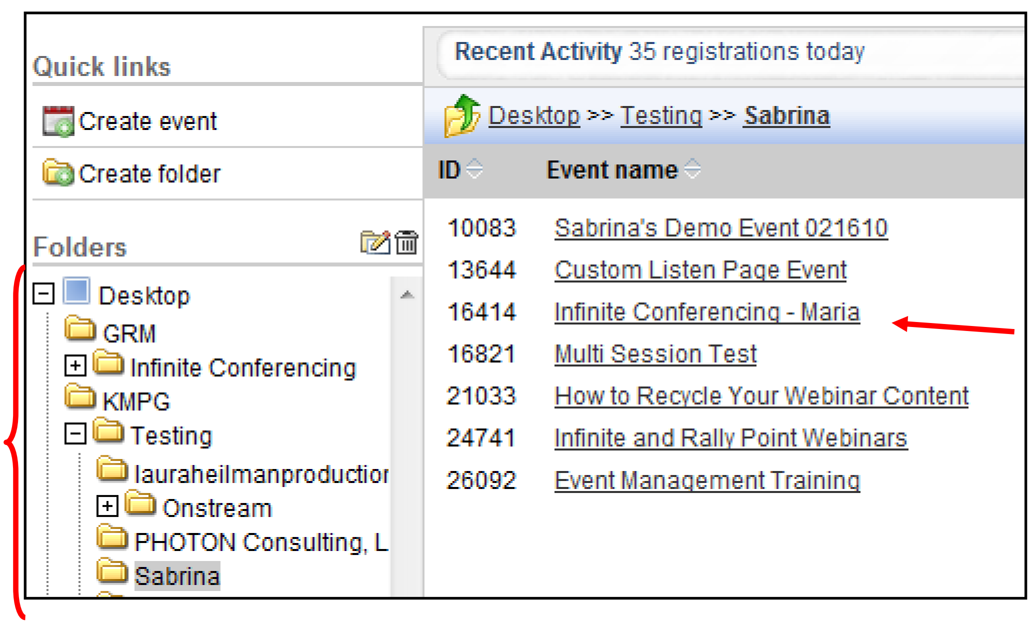
Step 2: Link Payment Gateway to your Event

After setting up your payment gateway, you will now need to link it to your event.

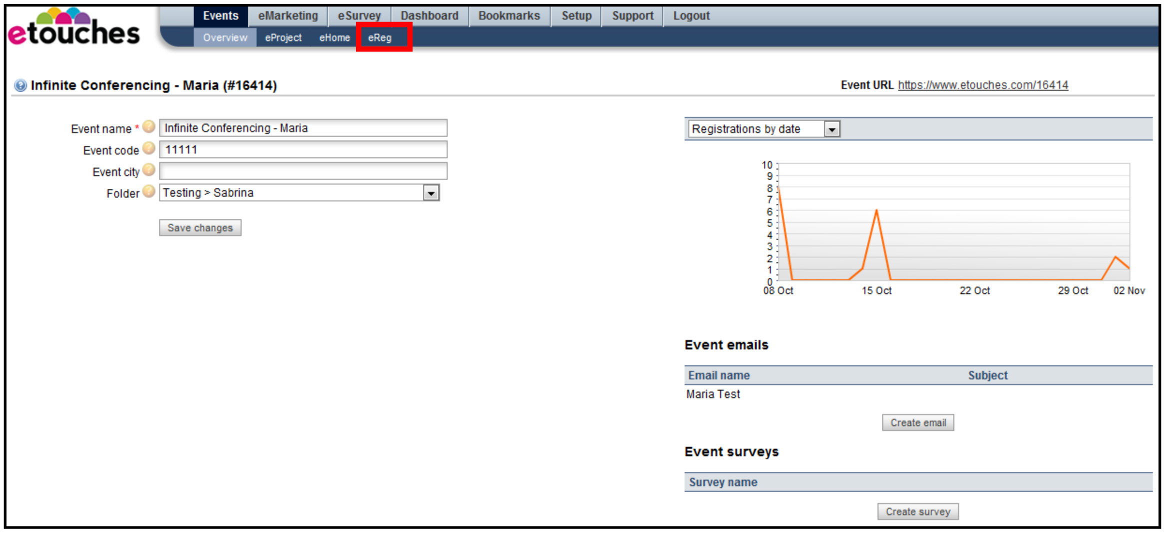
Go back to the home page by clicking on the **EVENTS** tab on the top of the page.



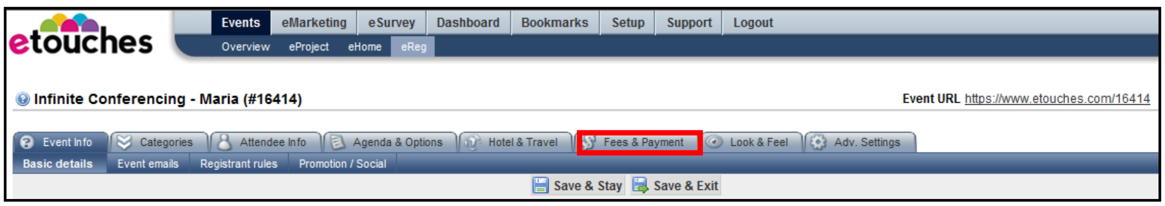
1. Search for your event through the folders on the left and click on your event.



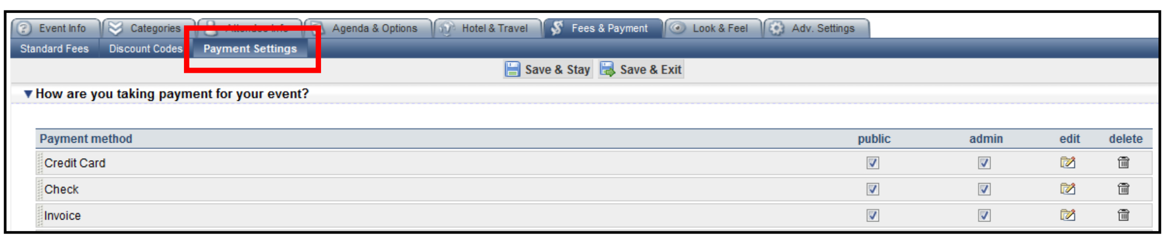
2. Click on the **eREG TAB**.



3. Click on the **FEES & PAYMENT TAB**.

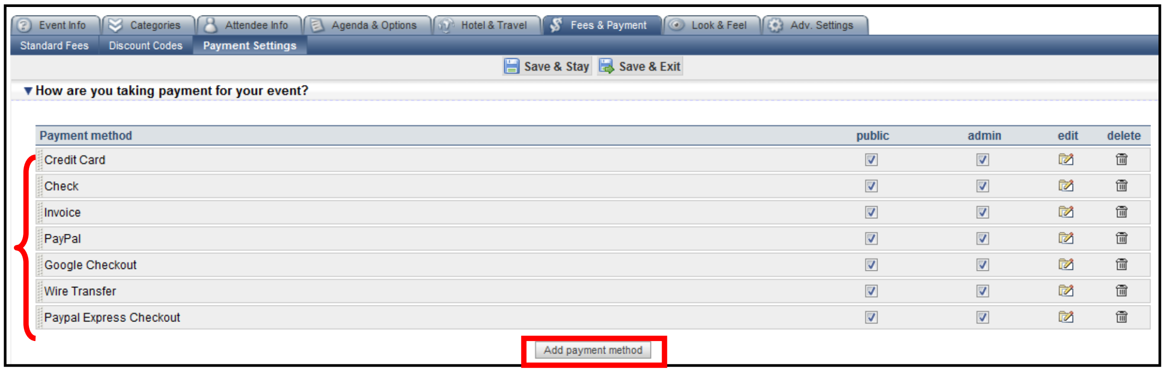


4. Click on the **PAYMENT SETTING TAB**.

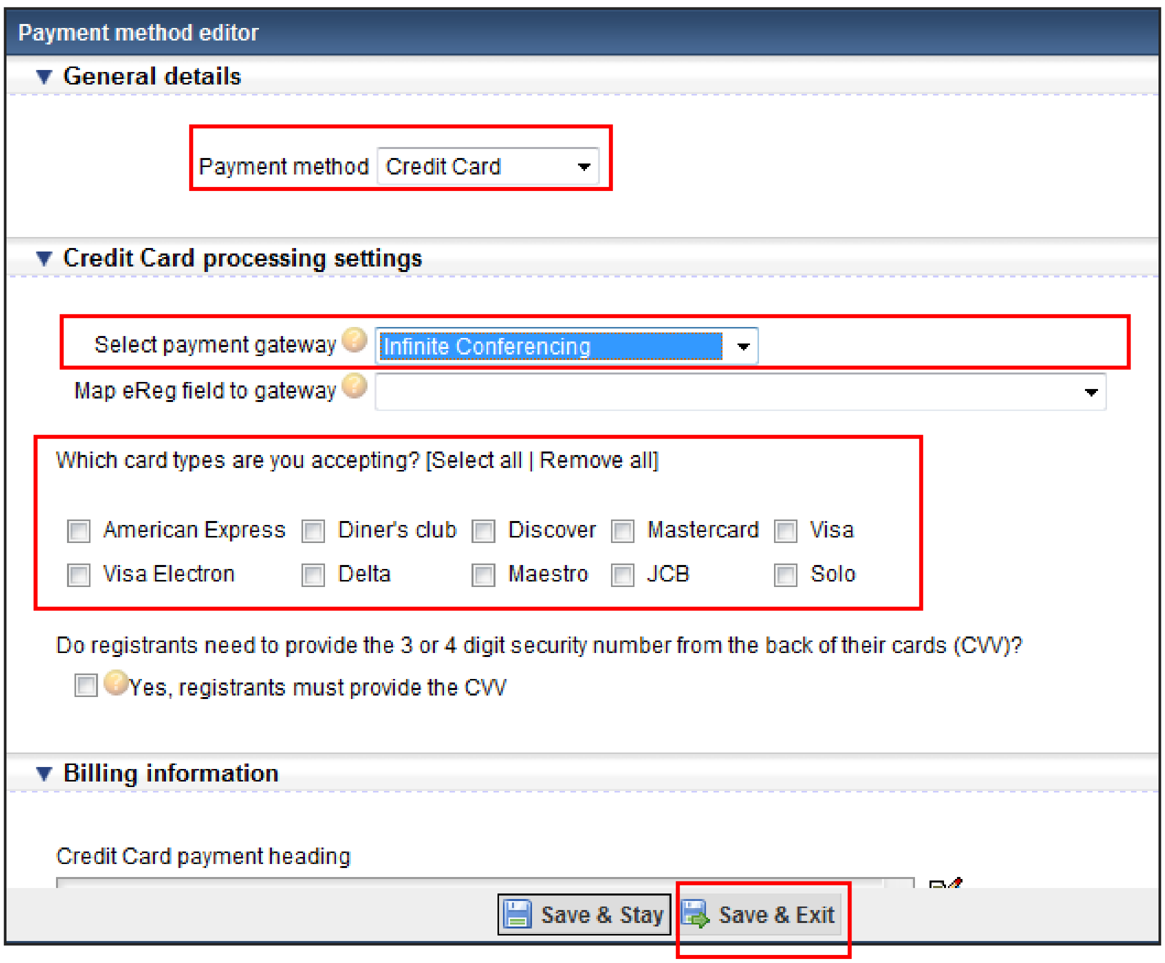


5. This section is for you to create and edit the available payment methods that your attendees can use to pay when they register. To add a payment method, click on **ADD PAYMENT METHOD.**

   NOTE: You can add multiple payment methods.



6. The Payment Method Editor window will appear where you can select the method and depending on what you select, then you will need to fill in the appropriate information. For example, if you are selecting credit card then you will need to select the payment gateway that you will want to use, which cards you will be accepting and the billing information that you will be collecting. Once you are done, you can select **SAVE & EXIT**.

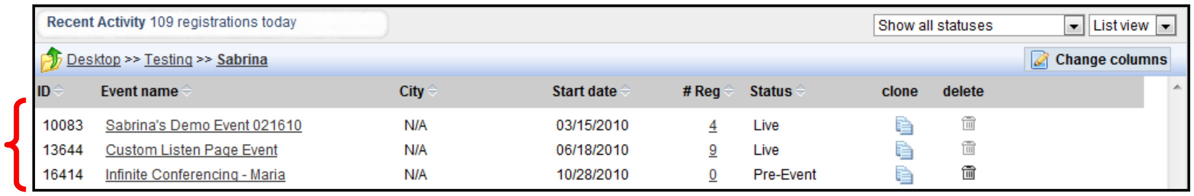


Step 3: Creating Fees

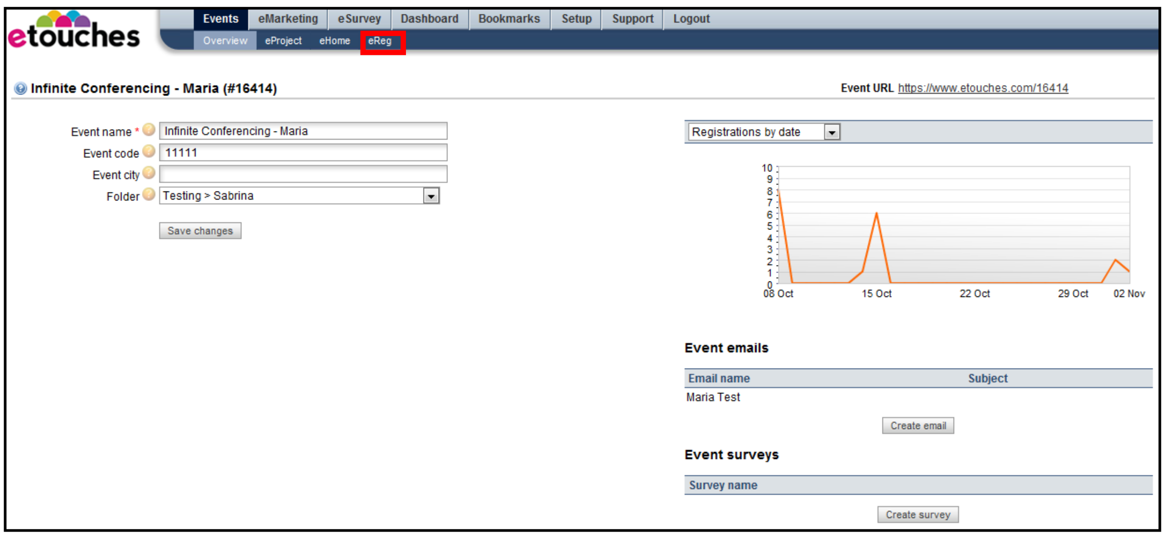
If you have not set up categories by now, then you will have to set it up before you start setting up fees for your event.

Setting up Categories

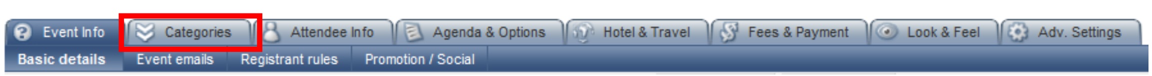
1. Click on your event.



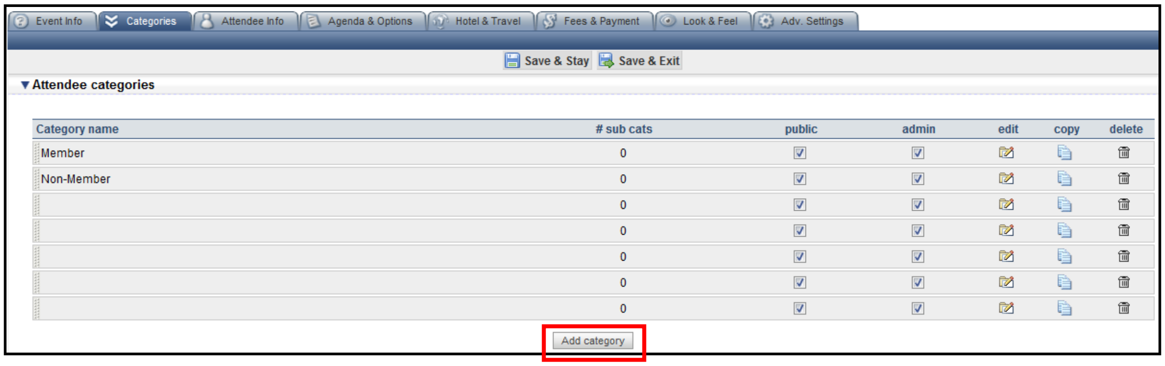
2. Click on **eREG SETTINGS**.



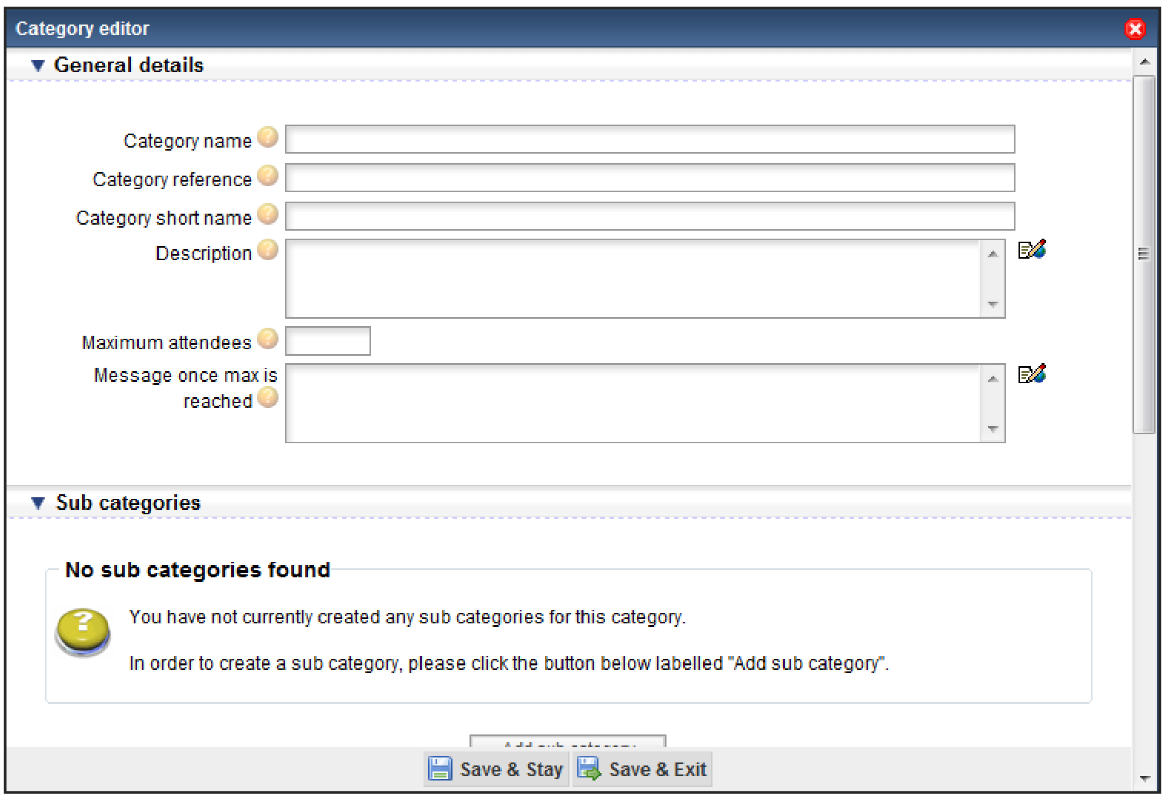
3. Click on the **CATEGORIES** tab.



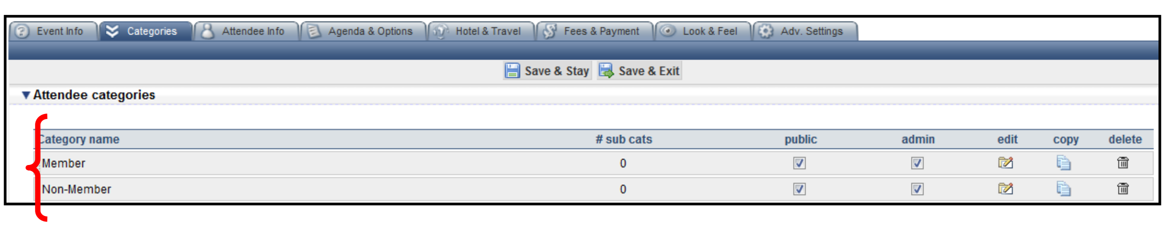
4. Click on the **ADD CATEGORY** button to add your categories.



5. Fill in the information that you would like to have, you basically just need the "Category Name" filled in order for it to work. Click on **SAVE & STAY** to add multiple categories and when you are fully done creating them then you can click on **SAVE & EXIT**.

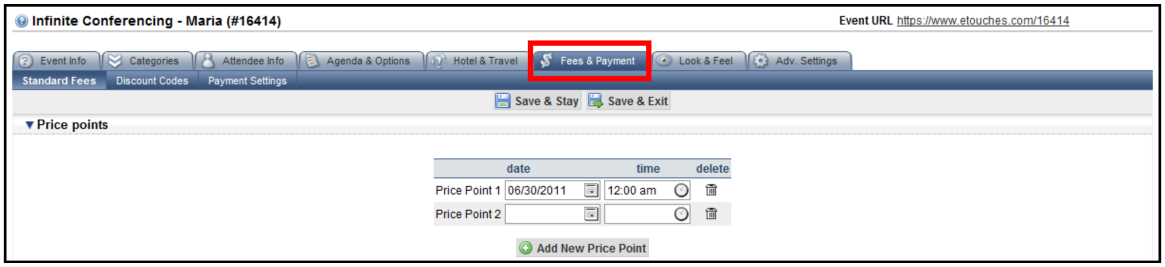


6. You will then see a list of all the created categories and now you can assign their appropriate fees.

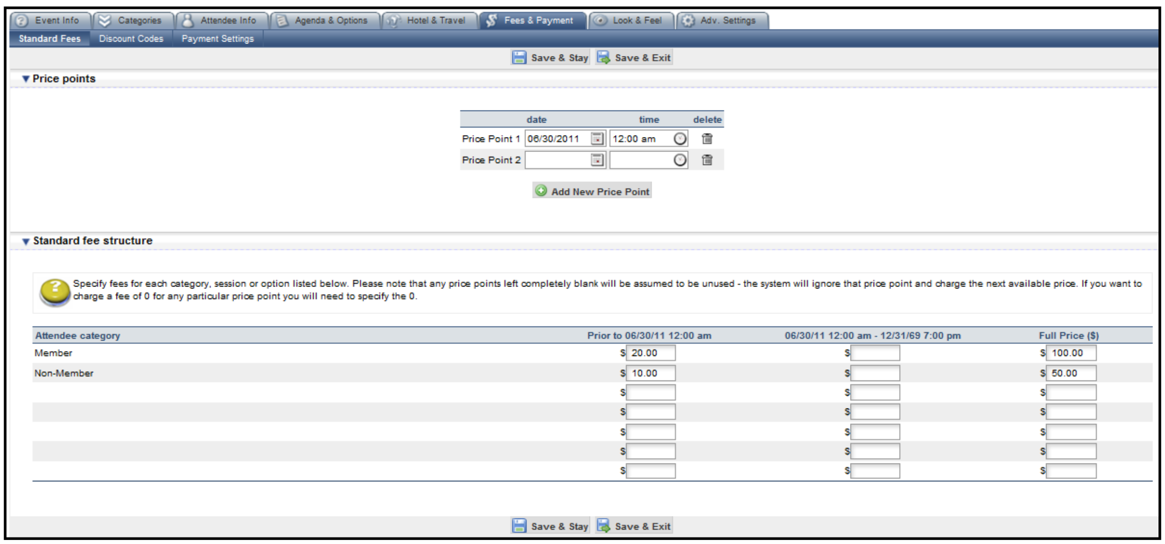


Linking the Fees to Categories

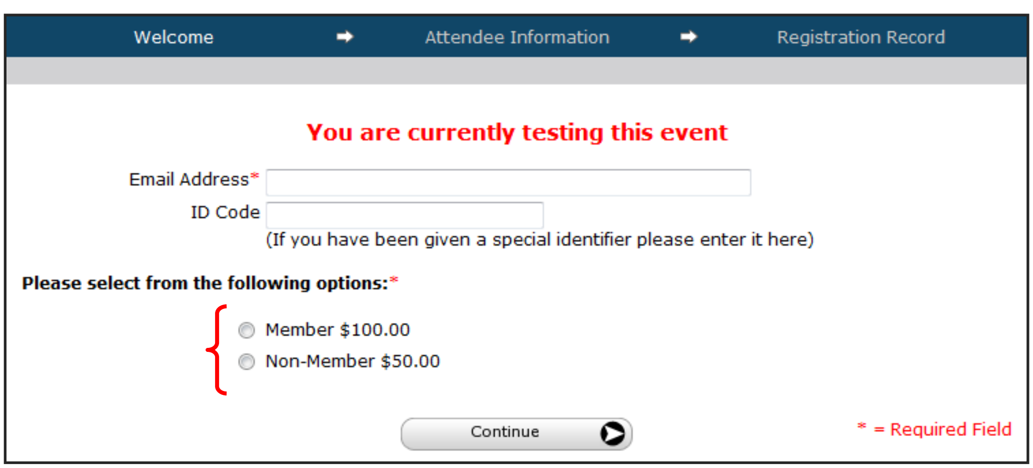
1. Click on the **FEES & PAYMENT** tab.



2. You will be taken to the Standard Fees screen where you can insert the prices for each category. Once you are done click on **SAVE & EXIT** at the bottom of the page.

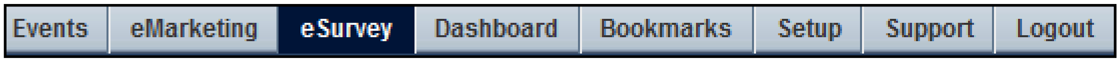


3. You are done creating the Payment Gateway and Fees. The below screen will show you how the fees will look like for the registrants.

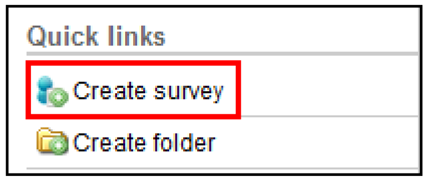


Creating a Survey

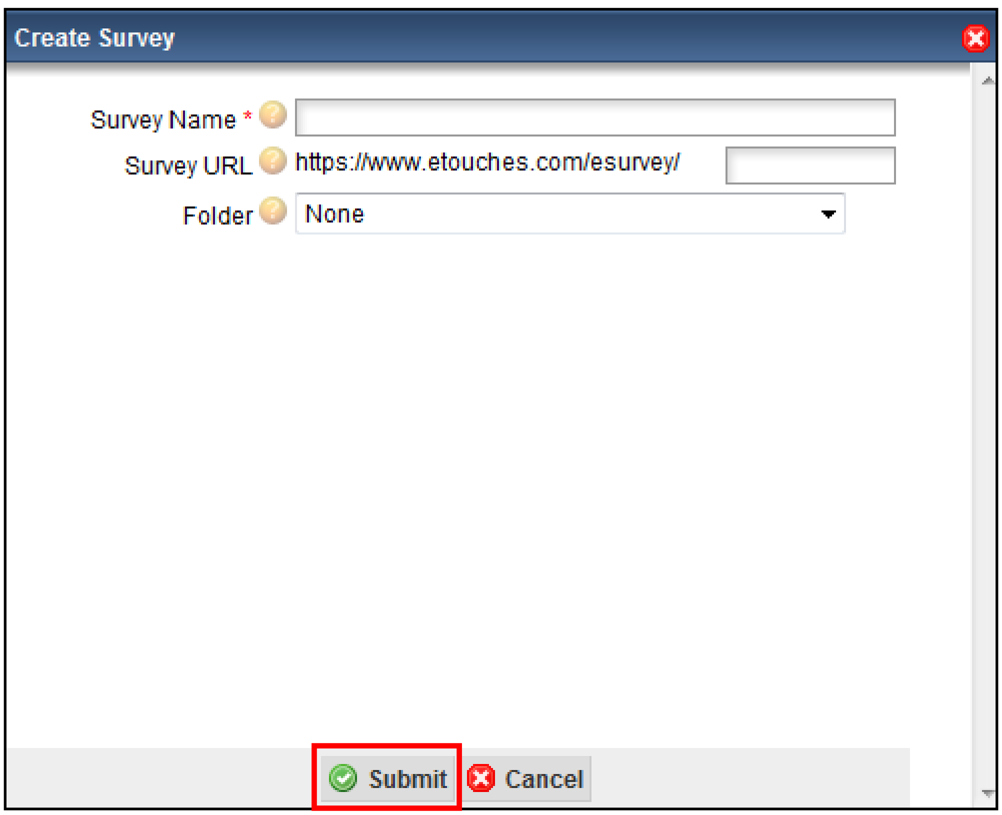
1. Click on **eSURVEY**.



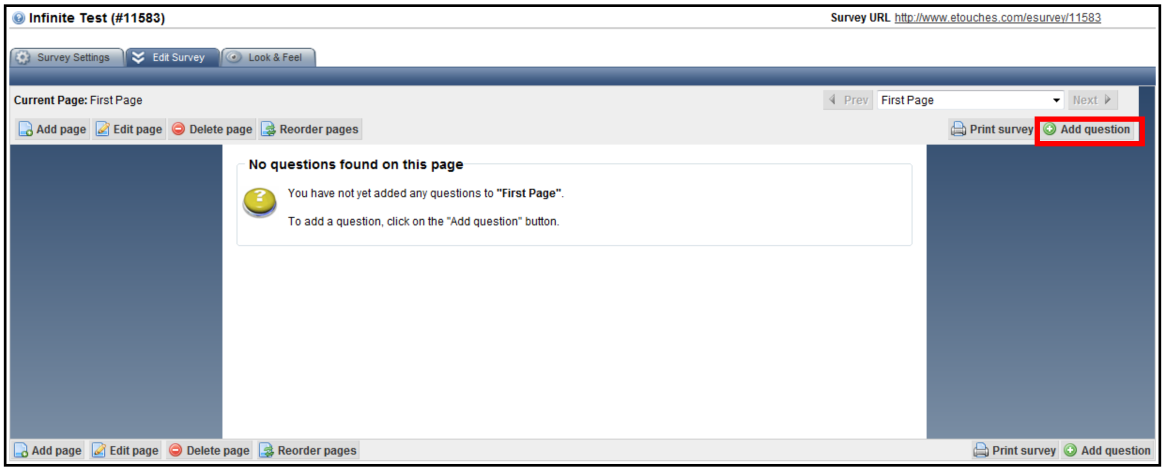
2. Click on the **CREATE SURVEY** button located on the left of the page.



3. Enter then name of your survey in the "Survey Name" field. Type an alternative URL by which people can reach your survey in the "Survey URL". Select the folder where you would like to place your survey. Click **SUBMIT** to create the survey..

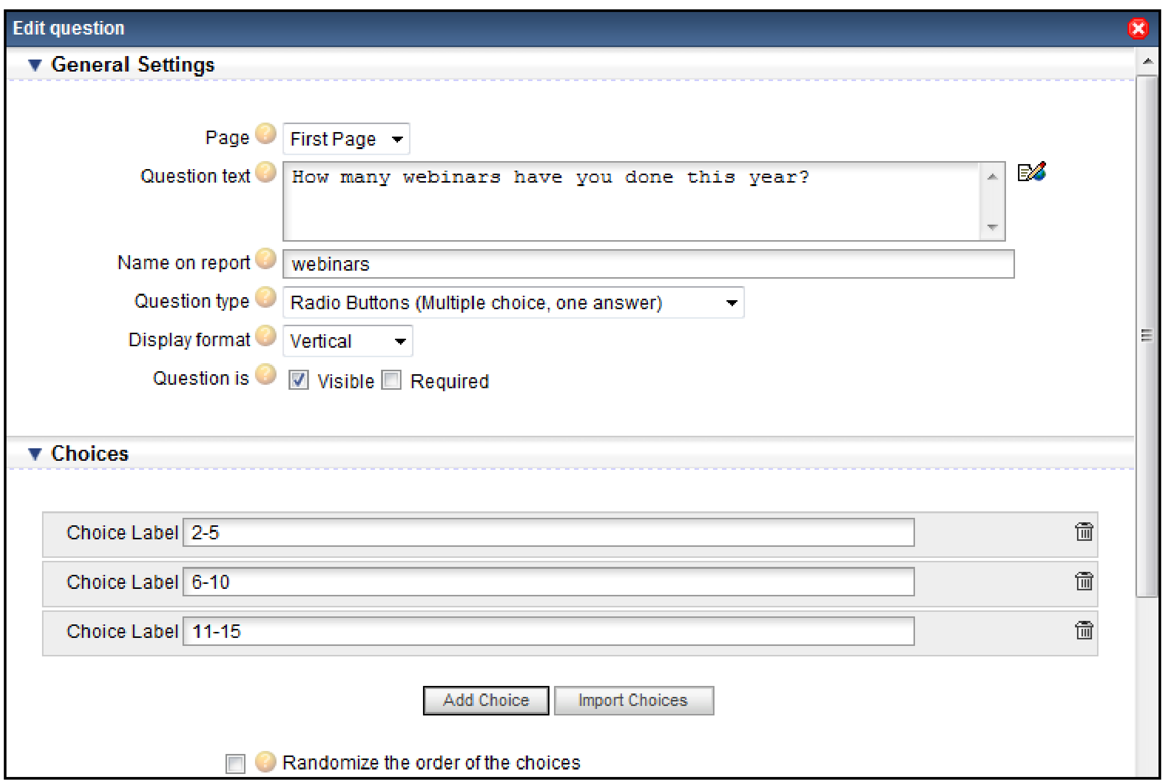


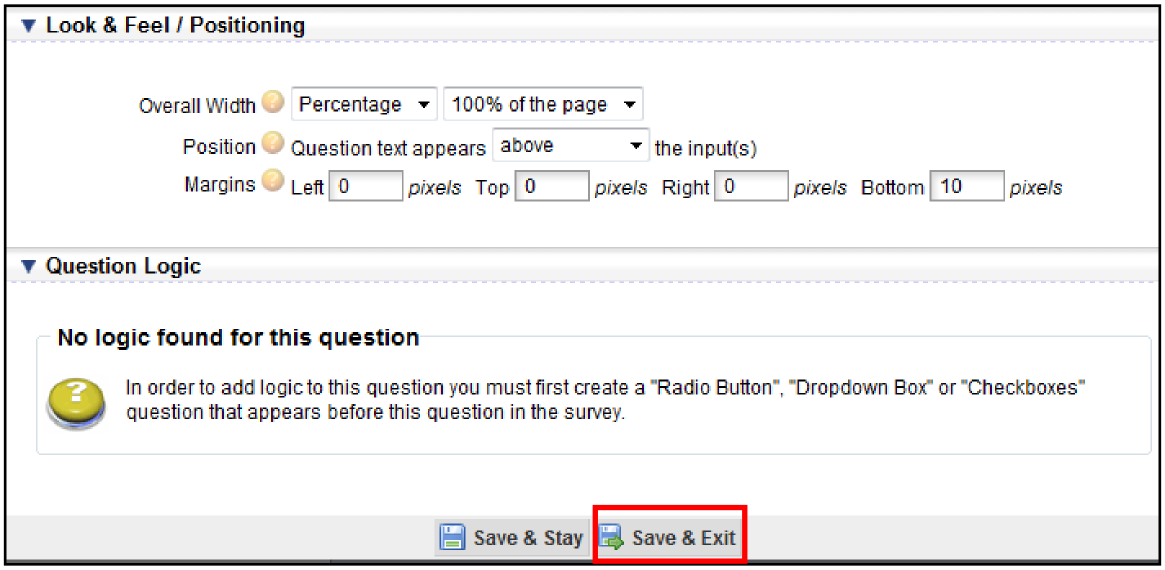
4. To add a question, click on the **ADD QUESTION** button.



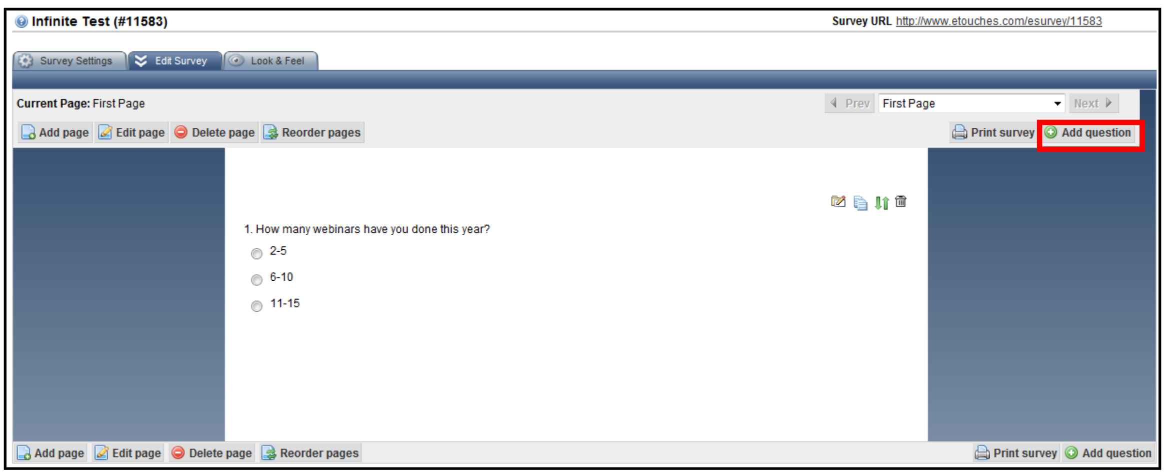
5. Fill out the general settings of your question.
    - **Page:** select the Page of the survey that this question should appear on from the drop down menu.
    - **Question Text:** enter the text that should appear with the question.
    - **Name on Report:** enter a short name for this question that will be used for reporting.
    - **Question Type:** Select the type of question you want this to be. Once you select the type, the window open up more options depending on what you choose. (The example below shows you the options when you select radio buttons – add the Choices, Look & Feel/Positioning).

Once you are done, click on **SAVE & EXIT**.

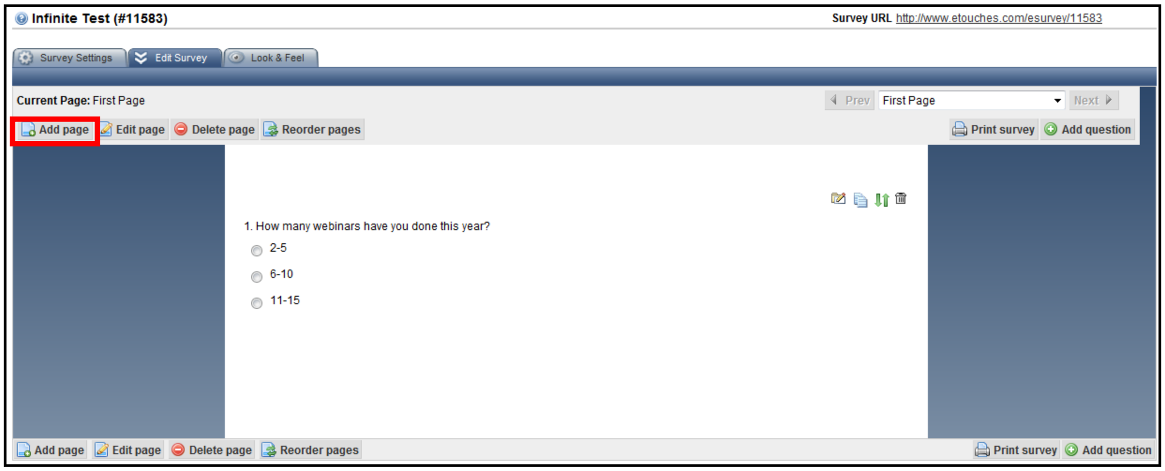




6. You will now see that your survey question has been saved. Continue the **ADD QUESTION** process if you want to add more questions in your survey.

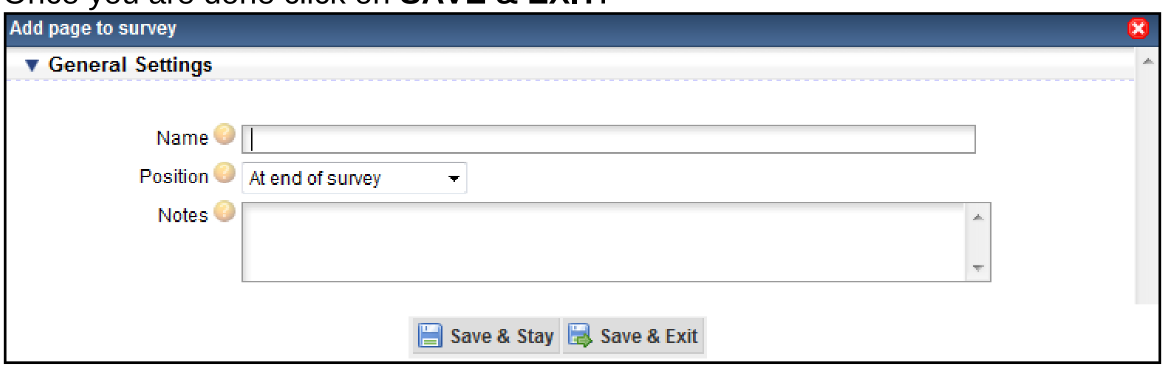


7. There is an option to add a page to the survey. You can use this feature for adding an introduction of the survey at the beginning or for thanking the survey taker at the end. Click on **ADD PAGE**.

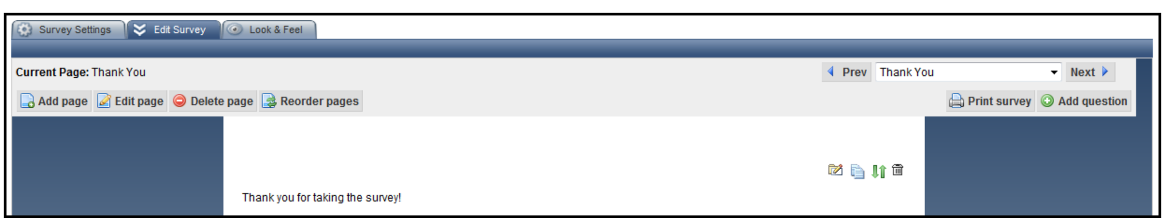


8. Fill out the information necessary:
   - **Name:** this is the name of the page that you are adding.
   - **Position:** select where the survey should appear – at beginning of survey or at end of survey.
   - **Notes:** these notes are for internal purposes to help you identify your page.

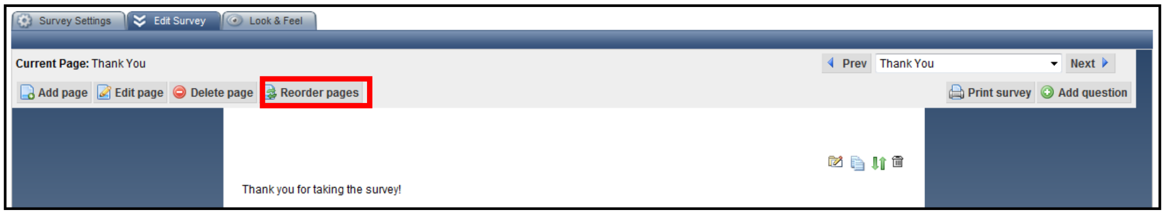
Once you are done click on **SAVE & EXIT**.

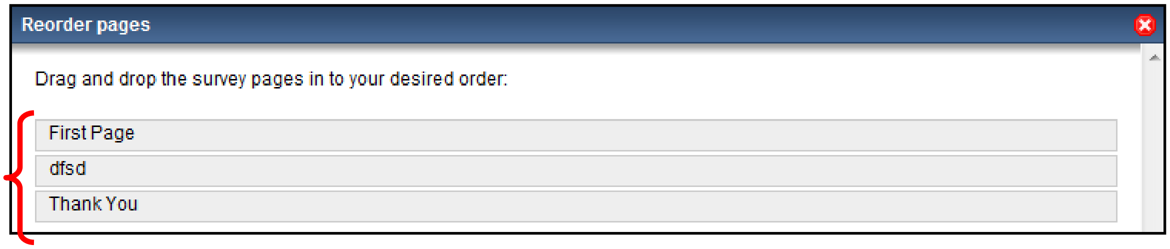


9. Now you can add other questions or enter a brief sentence to this new page by using the **ADD QUESTION** button**.**

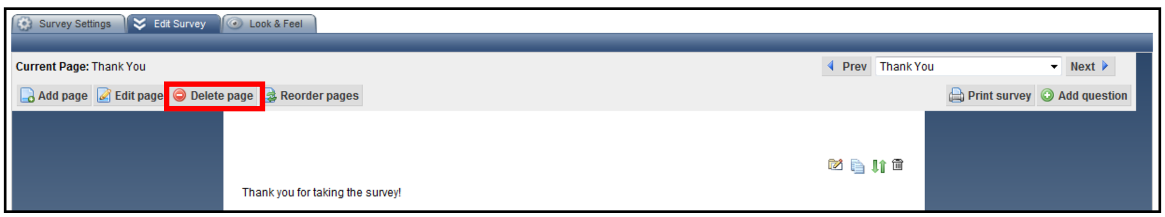


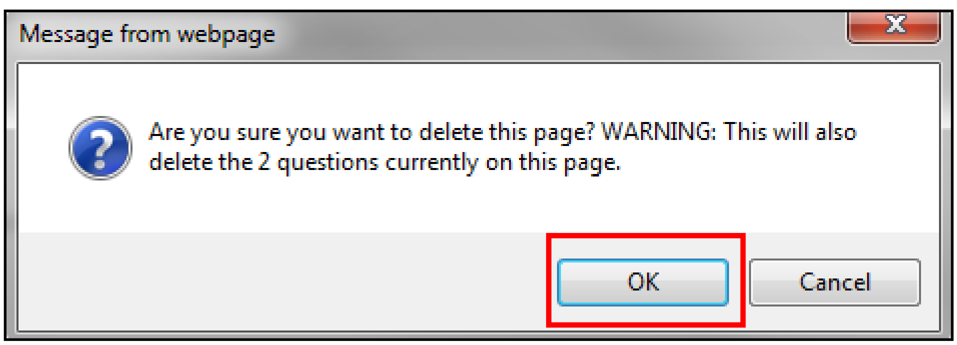
10. You also have the option to reorganize the survey pages in the exact order that you would like your registrants to view it. Click on the **REORDER PAGES** button and drag and drop the survey pages in the desired order. Once you are done reordering the pages, then you can select **SAVE & EXIT**.





11. To delete a page, you can use the **DELETE PAGE** button. A confirmation window will appear where you can select **OK** to continue with the deletion.

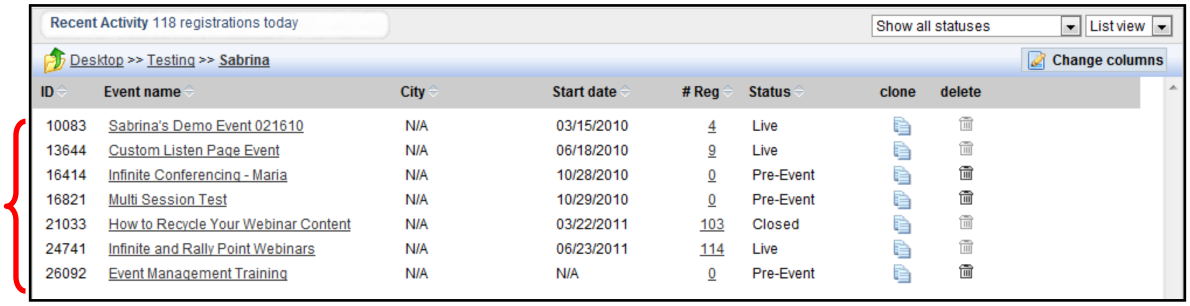




Testing your Event

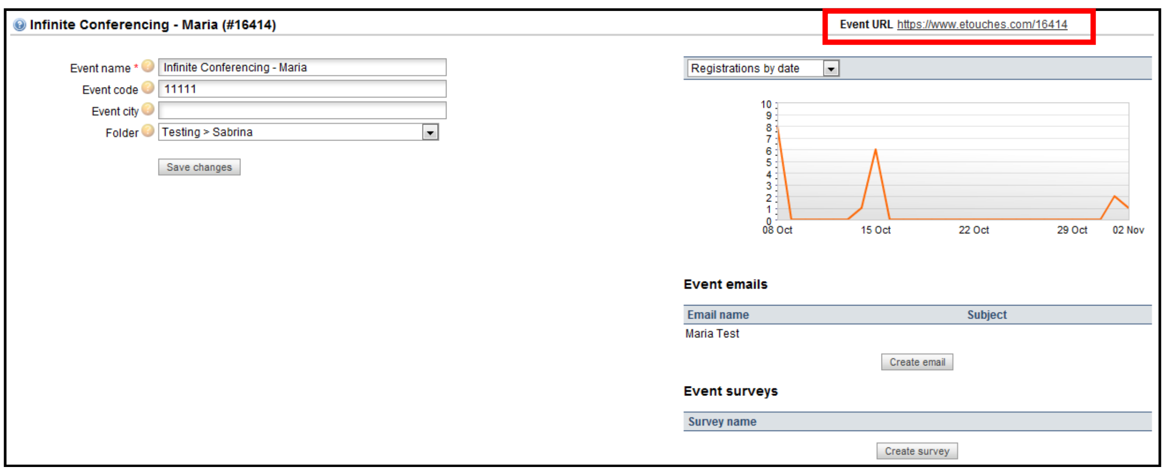
You should test your event registration before launching it live.

1. Click on your event.

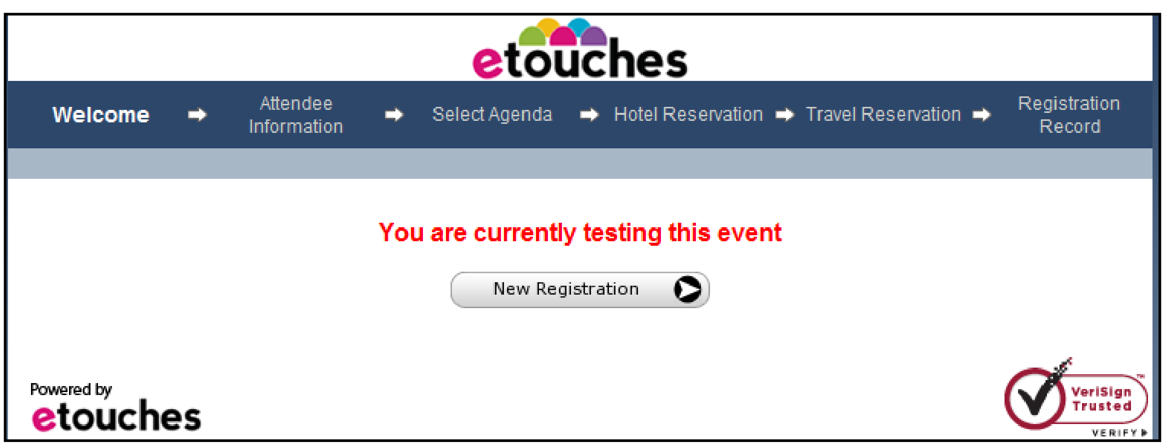


ID	Event name	City	Start date	# Reg	Status	clone	delete
10083	Sabrina's Demo Event 021610	N/A	03/15/2010	4	Live		
13644	Custom Listen Page Event	N/A	06/18/2010	9	Live		
16414	Infinite Conferencing - Maria	N/A	10/28/2010	0	Pre-Event		
16821	Multi Session Test	N/A	10/29/2010	0	Pre-Event		
21033	How to Recycle Your Webinar Content	N/A	03/22/2011	103	Closed		
24741	Infinite and Rally Point Webinars	N/A	06/23/2011	114	Live		
26092	Event Management Training	N/A	N/A	0	Pre-Event		

2. The Event URL will always be at the top right part of the screen. Copy that event URL and paste into another browser or just click on it.

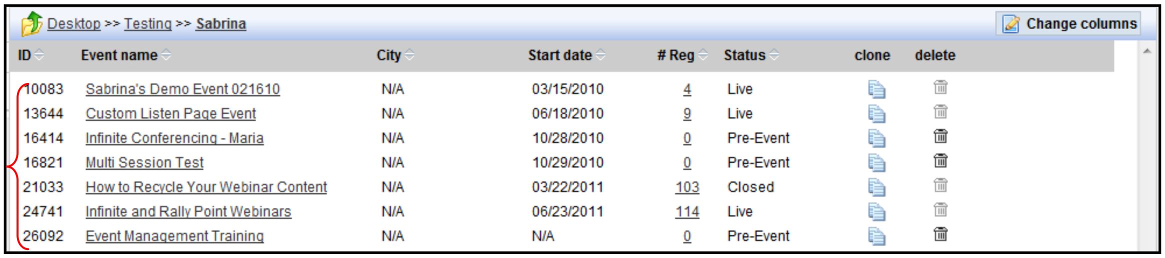


3. This is what your event will look like to registrants and you can test the whole registration process.

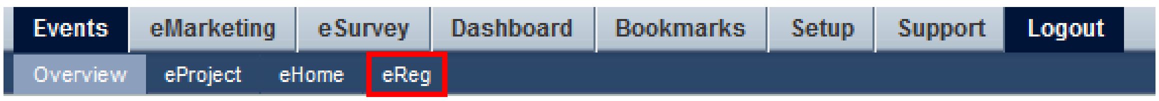


Setting Up Facebook Integration

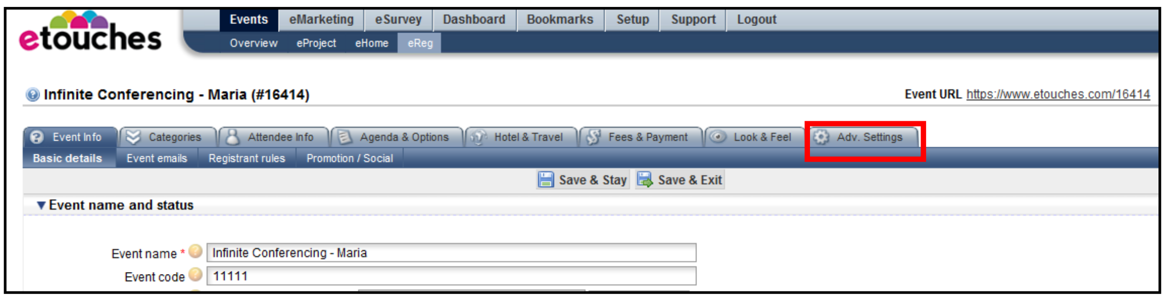
1. Click on your event.



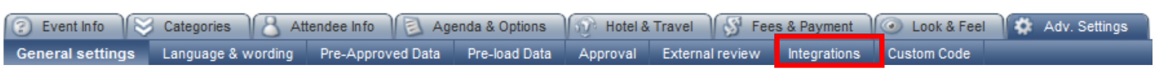
2. Click on the **eREG TAB**.



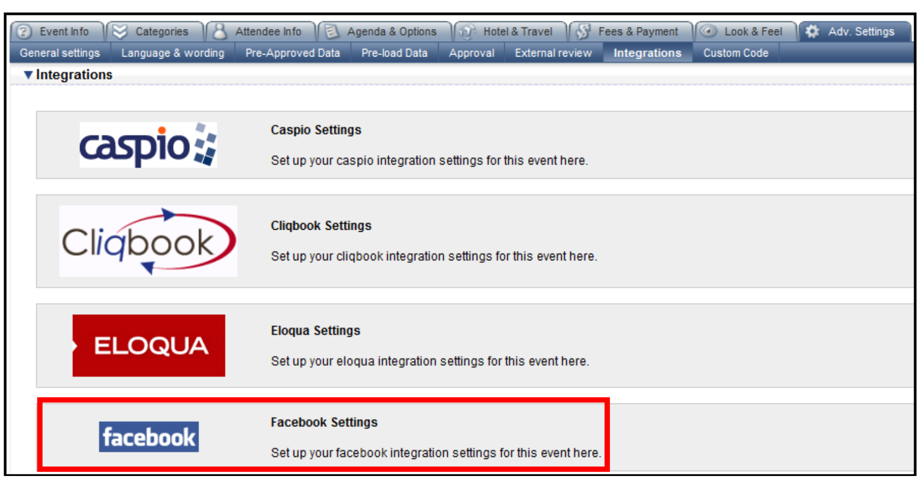
3. Click on the **ADVANCED SETTINGS TAB**.



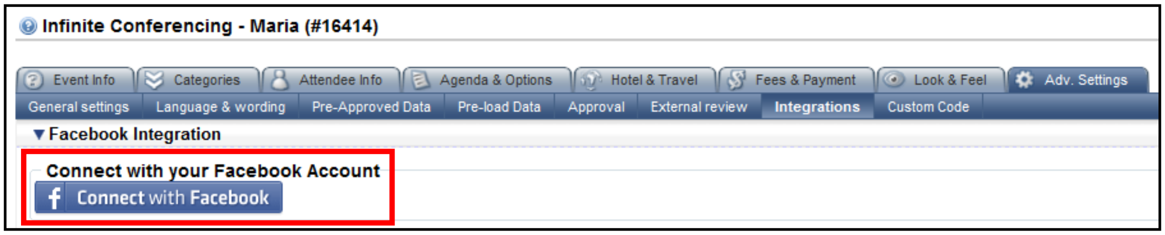
4. Click on the **INTEGRATIONS TAB**.



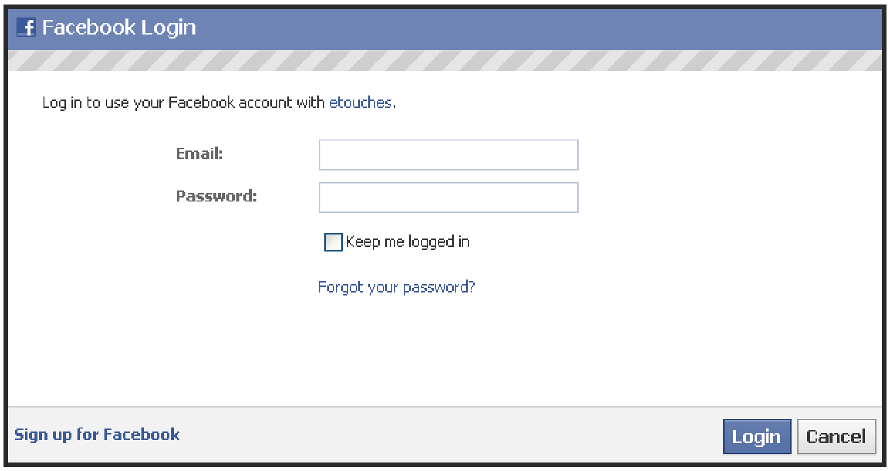
5. Scroll down until you find the **FACEBOOK** button and click on it.



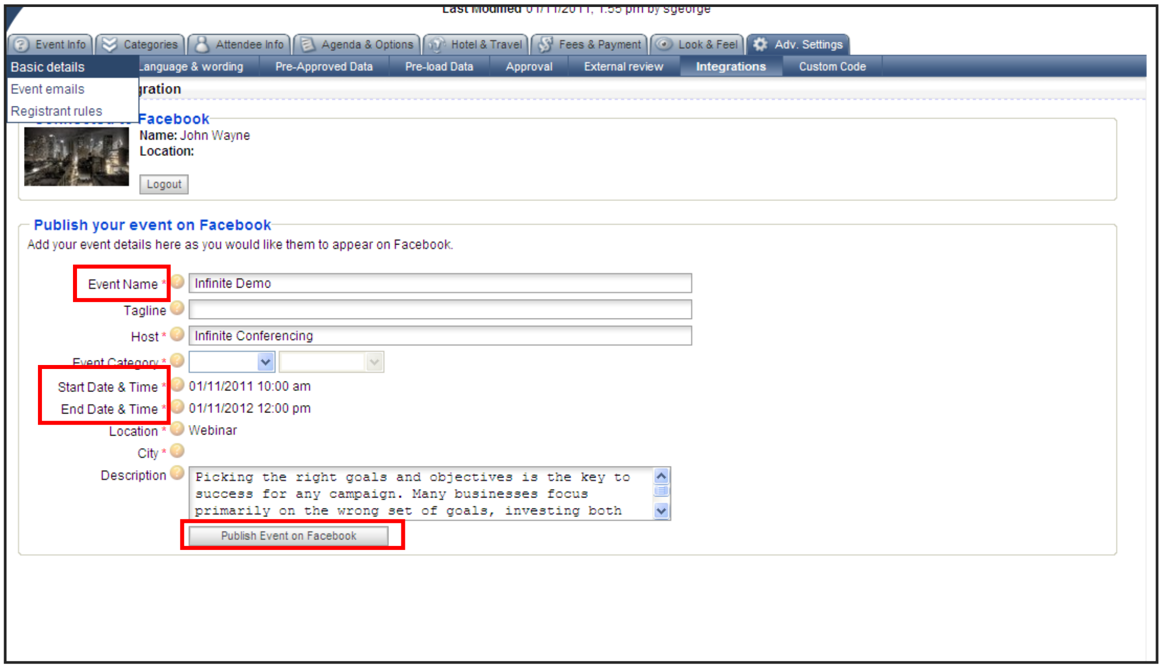
6. Click on the **CONNECT WITH FACEBOOK** button.



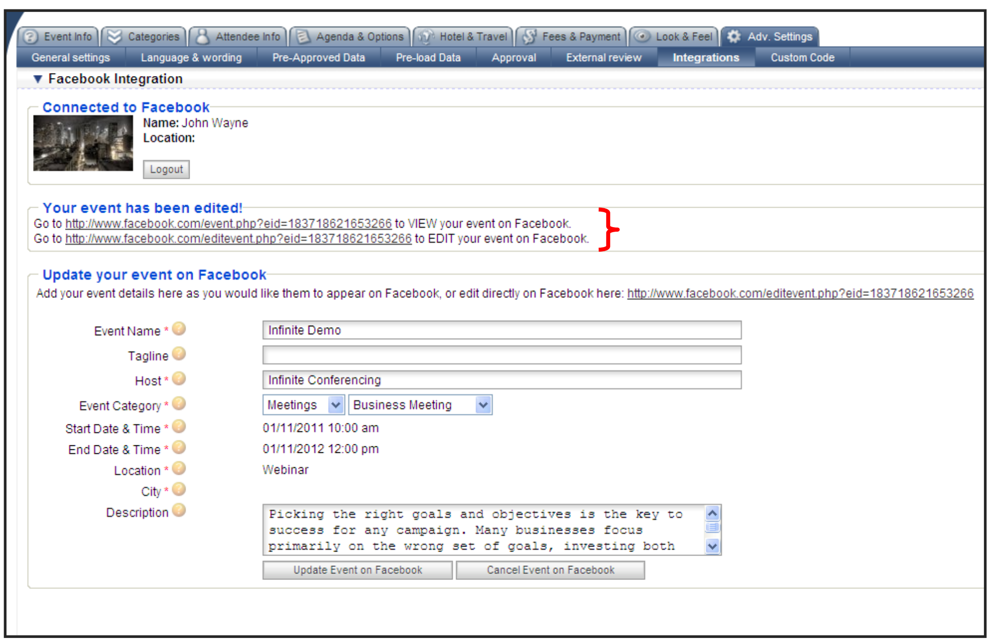
7. A small window will open asking you to provide your login credentials for Facebook. Enter this information and click **LOGIN**.



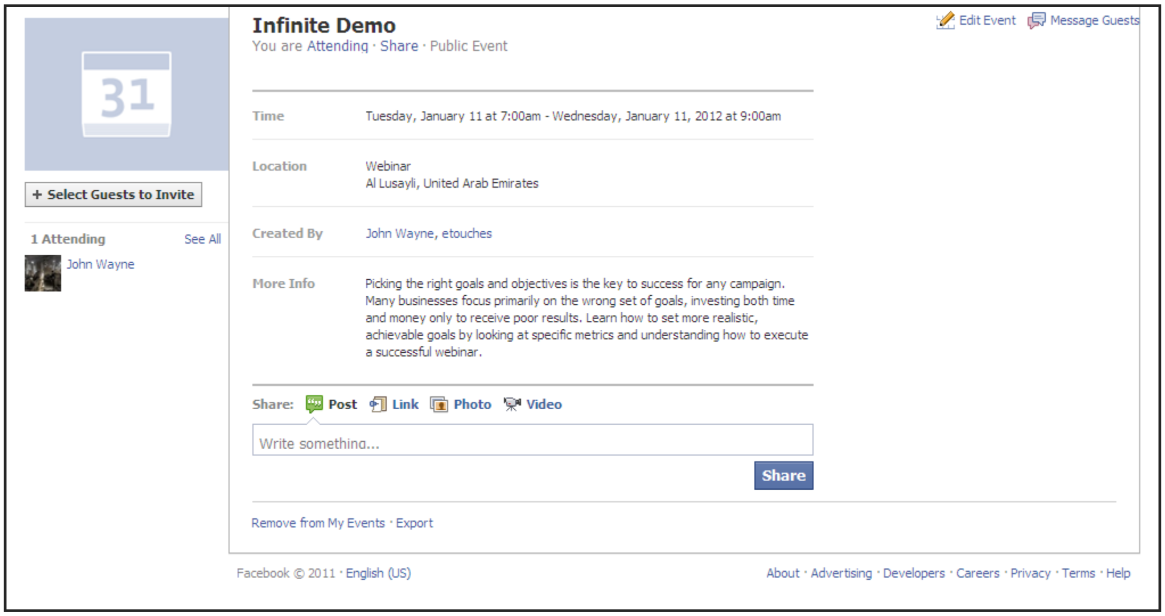
8. A window will appear where you need to be sure you input an event location, start and end date, as well as a start and end time in order for it to integrate properly. Once you have entered the general details for your event, you can publish the event on Facebook. To do this click the button labeled **PUBLISH EVENT ON FACEBOOK**.



9. A link will appear on the top to view your event or edit your event on Facebook.



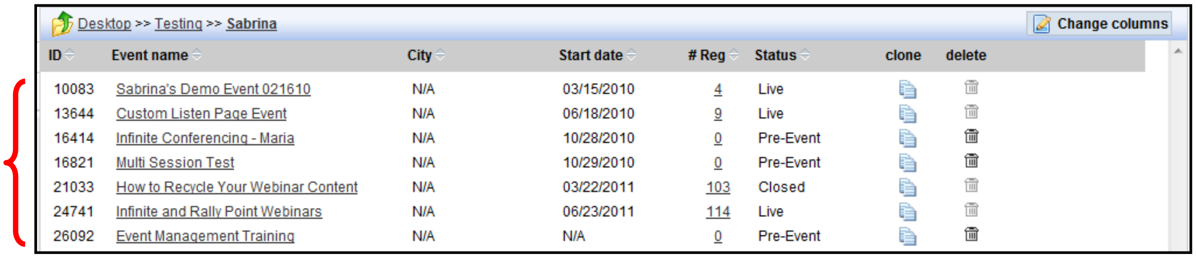
10. You will then be able to access the event via your Facebook website. From Facebook you can invite friends, colleagues, etc to attend.


Infinite Demo
You are Attending · Share · Public Event
Edit Event
Message Guests
+ Select Guests to Invite
1 Attending
See All
John Wayne
Time
Tuesday, January 11 at 7:00am - Wednesday, January 11, 2012 at 9:00am
Location
Webinar
Al Lusayli, United Arab Emirates
Created By
John Wayne, etouches
More Info
Picking the right goals and objectives is the key to success for any campaign. Many businesses focus primarily on the wrong set of goals, investing both time and money only to receive poor results. Learn how to set more realistic, achievable goals by looking at specific metrics and understanding how to execute a successful webinar.
Share: Post Link Photo Video
Write something...
Share
Remove from My Events · Export
Facebook © 2011 · English (US)
About · Advertising · Developers · Careers · Privacy · Terms · Help

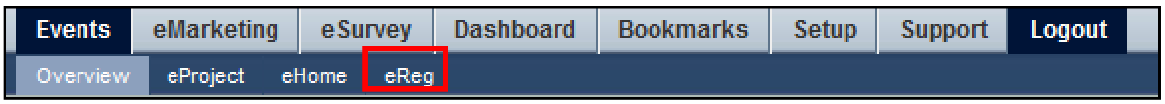
Setting up Salesforce Integration

NOTE: You need to have enterprise license or above for Salesforce to integrate with etouches.

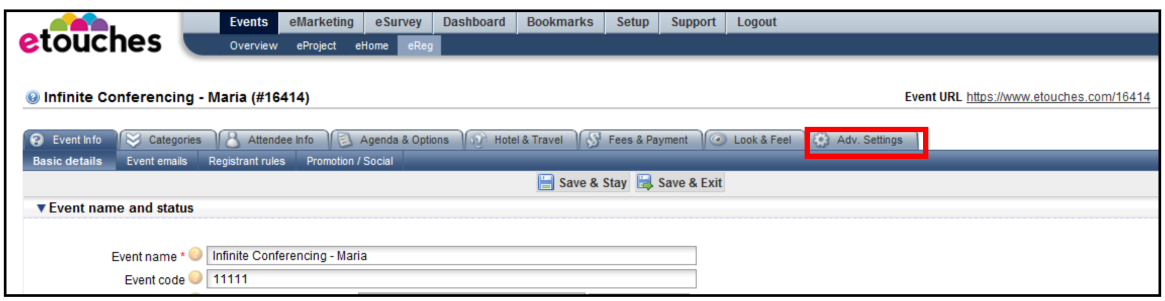
1. Click on your event.



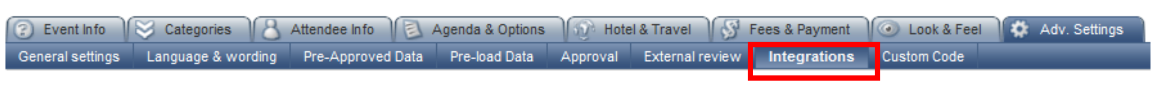
2. Click on the **eREG TAB**.



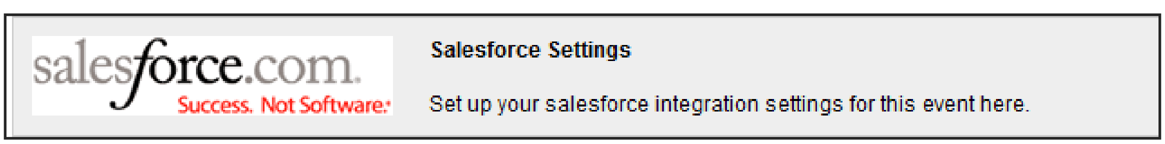
3. Click on the **ADVANCED SETTINGS** tab.



4. Click on the **INTEGRATIONS** tab.



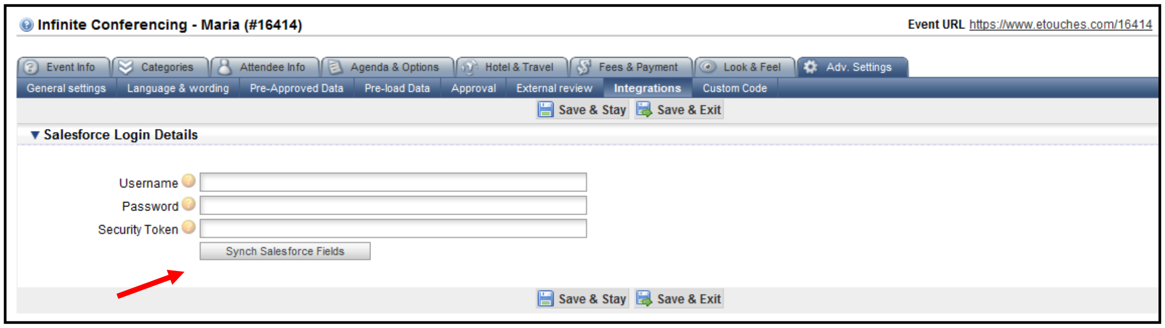
5. Scroll down until you find the **SALESFORCE** button and click it.



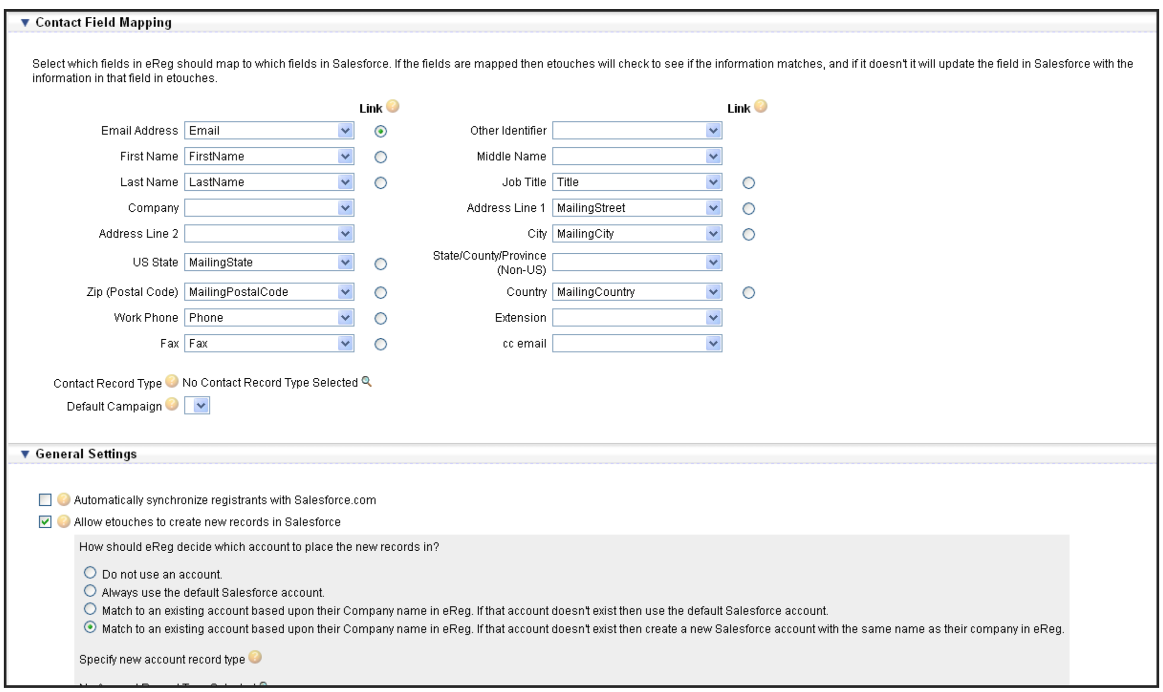
6. You will then need to enter your Salesforce account details:
   - Username
   - Password

- Security Token – If you do not know your Security Token you can log onto the Salesforce account, enter your username and password, go to the Setup page, select Security Controls on the left hand side menu, then you will select Network Access and within that menu you will see that there is an option to have your Security Token reset, and it will be emailed to you.

Once you have entered and saved your Salesforce account details, click on **SYNCH SALESFORCE FIELDS** button.



7. If the account details entered are correct your registration site will be synched with Salesforce. You will then be presented with a window where you will have the option to select fields that eReg will map to Salesforce. If the fields are mapped then etouches will check to see if the information matches, and if it doesn't, it will update the field in Salesforce with the information in that field in etouches.

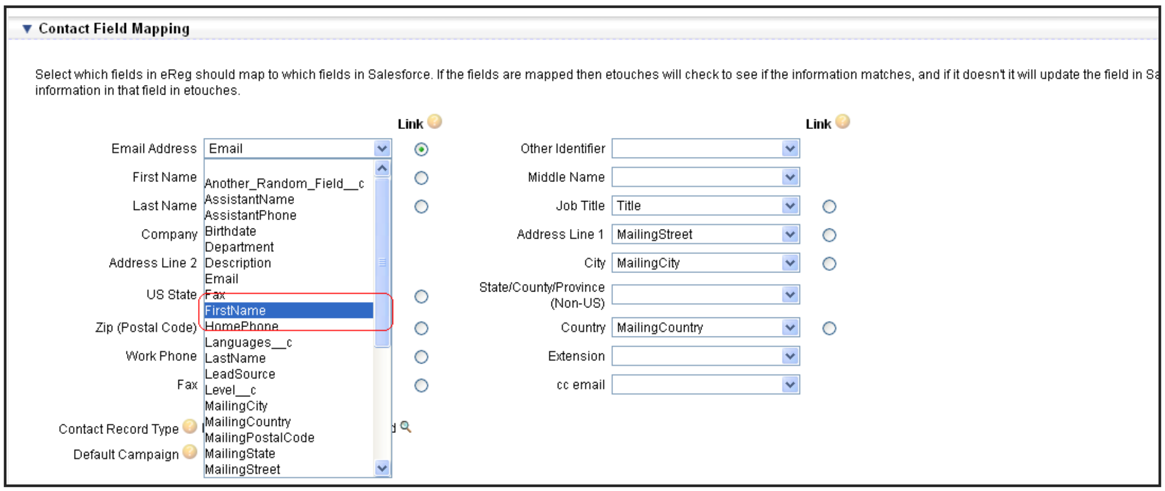


Description of Fields:

Contact Field Mapping

These are the eReg fields that were built and used within the Attendee Information Tab, for example, First Name, Last Name, Company, Email Address, etc.

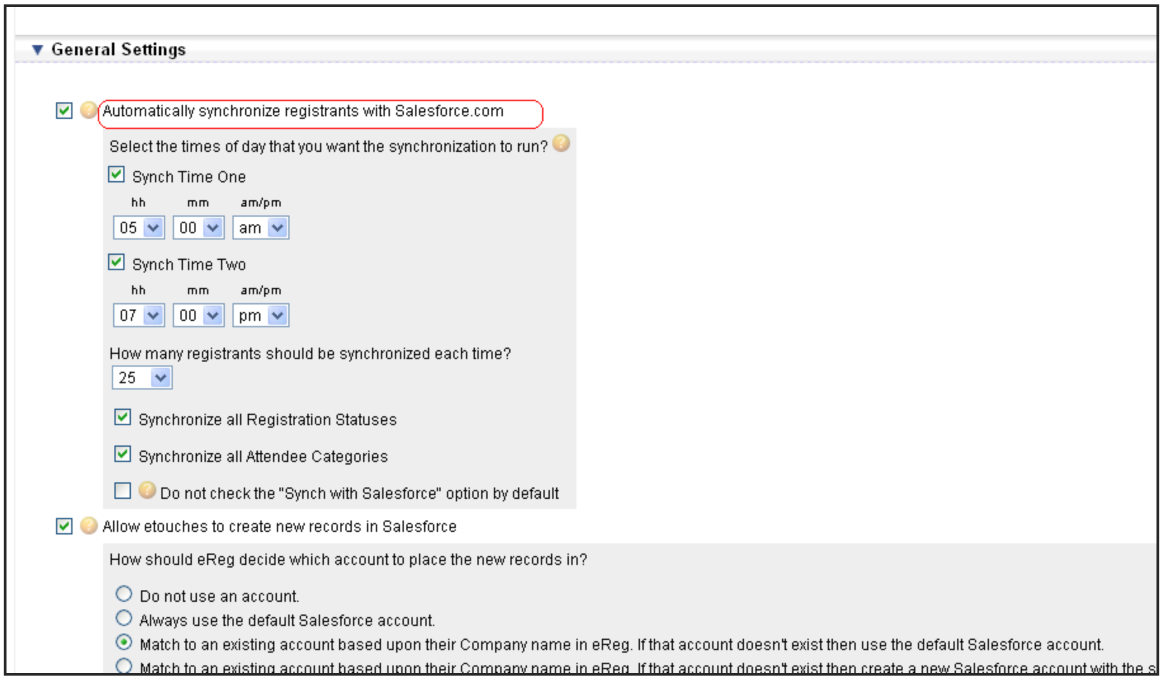
The dropdown boxes that are on the right hand side of each eReg Field hold the fields that are located within your Salesforce Contact Record Types, so you should be able to map the First Name field from eReg to the First Name field in Salesforce, as long as that field exists within Salesforce.



General Settings

This section allows you to determine etouches should integrate with your Salesforce account. You have three options that you can select:

Option 1: Automatically synchronize registrants with Salesforce.com



This option will allow your Event to automatically synch with Salesforce.

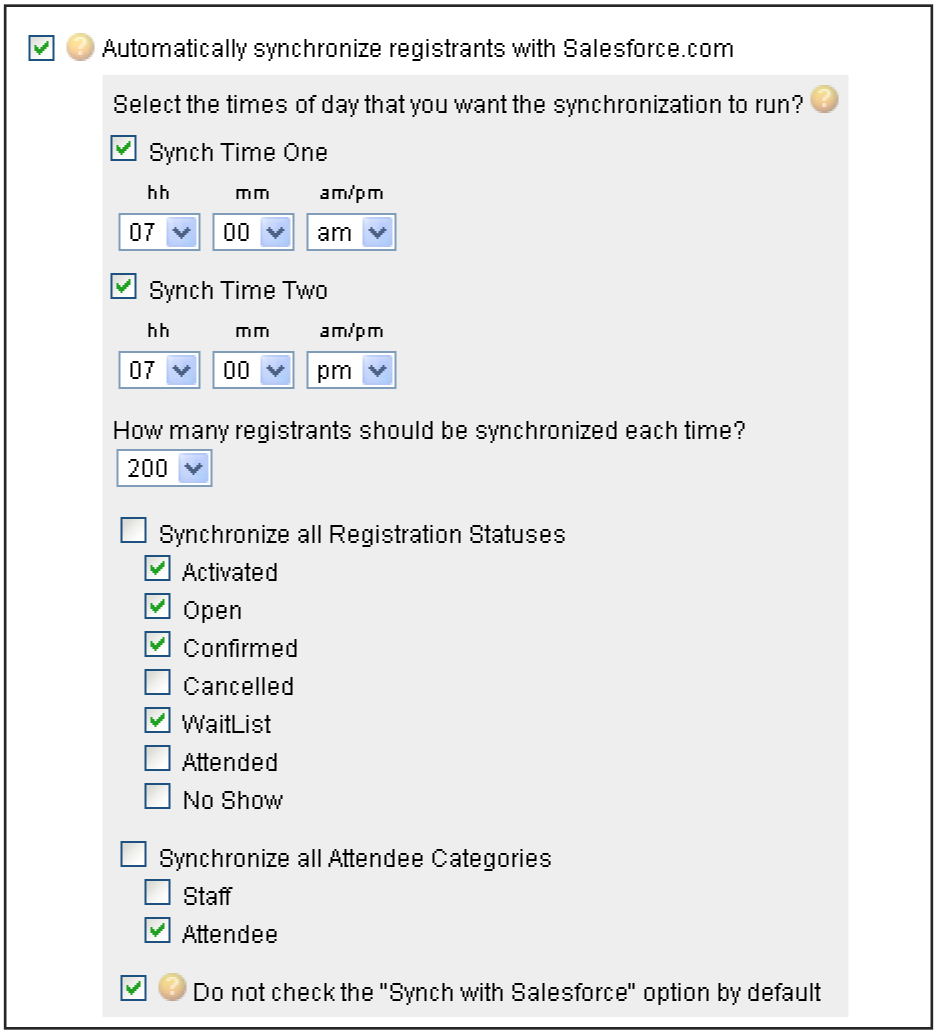
- You can select when the synchronization should run, once or twice a day.

- You can decide on how many registrants should be synchronized each time. If you selected 200 from this drop down list. The system will automatically synch up to 200 registrations at the time you specified. (Be aware that once the first 200 are synched, on the next scheduled synch the system will start with #201).

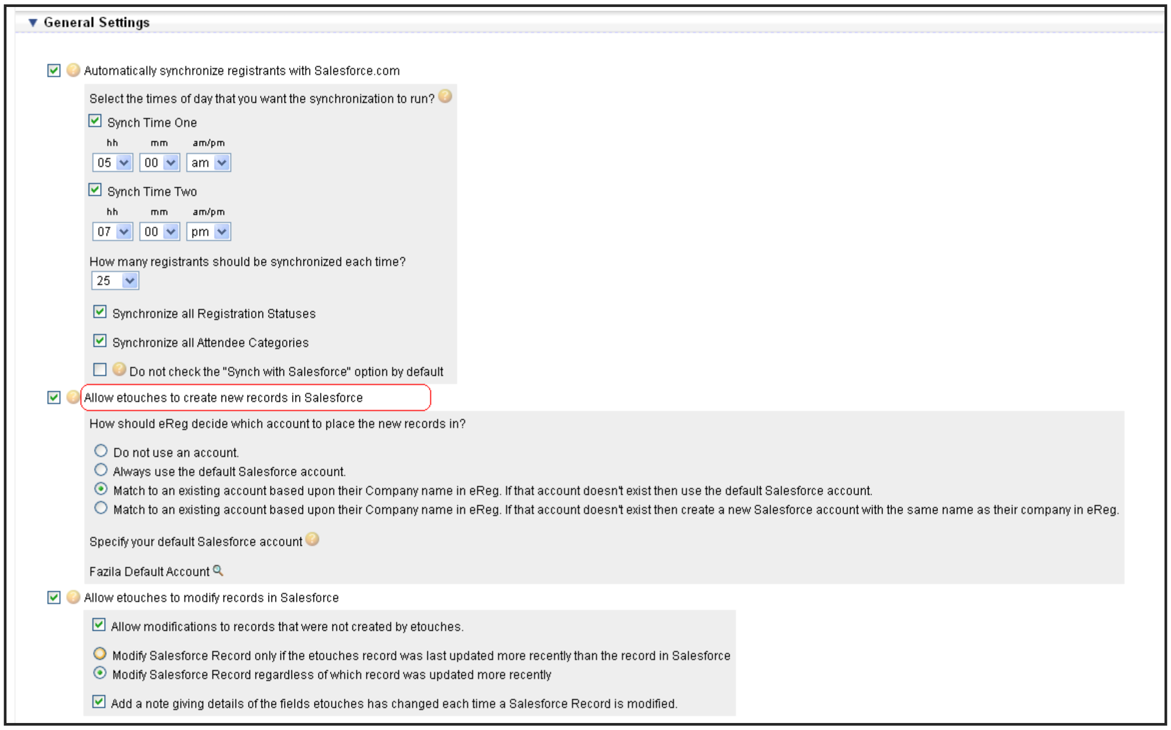
- You can determine if all registration statuses should be synchronized or you can select specific status.

- You can also specify which categories should be synchronized.

- Do not check the "Synch with Salesforce" option by default: If the Synch with Salesforce checkbox is unchecked by default then someone will need to turn it on for each registrant as they register in order for them to be automatically synched.



Option 2: Allow etouches to create new records in Salesforce.



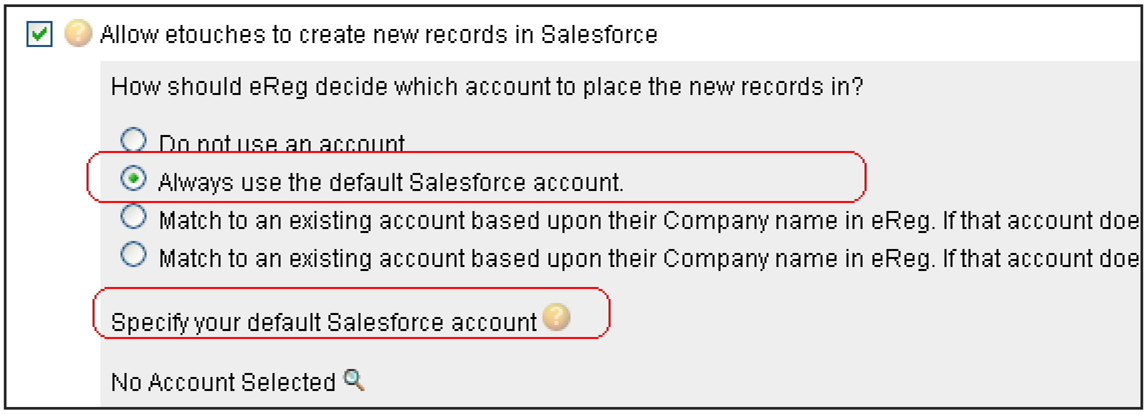
The option allows you to specify how the system should behave if a new registration takes place in etouches and an account is not recognized in Salesforce for this record.

So there are four options you can choose from of how eReg should decide which account to place the new records in:

a. Do not use an account.
When you sync the records in etouches, the records will not be assigned to an account.

b. Always use the default Salesforce account.
You will create a "default" account in Salesforce that might be called etouches, or the name of your etouches event, and all new records that come in and register will fall into that default account. You will then want to create a new Salesforce account for that record to fall into. This might make it easier because you will know all NEW records fall in the same place.

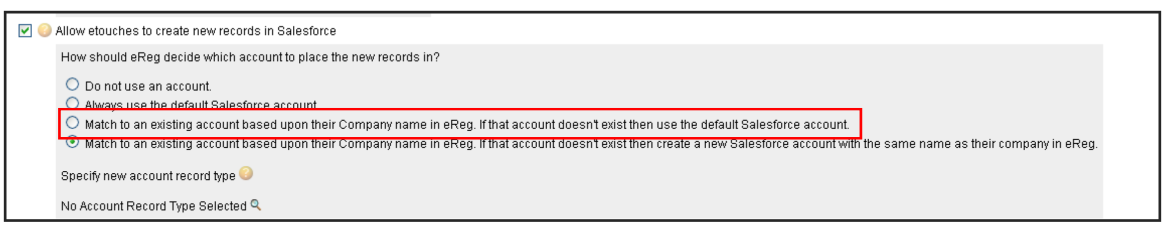
You will need to specify the default account you would like it to fall in.



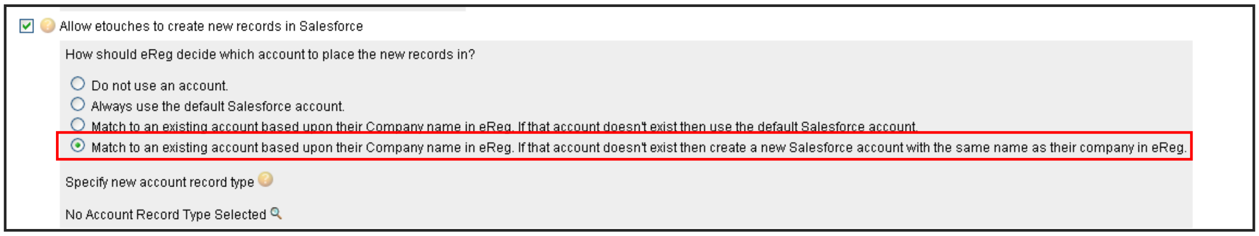
c. **Match to an existing account based upon their Company name in eReg. If that account doesn't exist then use the default Salesforce account.**
The synchronization will attempt to find the Salesforce account that matches the registration, and if it finds a match by the company name, it will place that new record in that account.

If that company's account cannot be found in Salesforce, the new record will automatically fall into the Salesforce default account that was created for this registration.

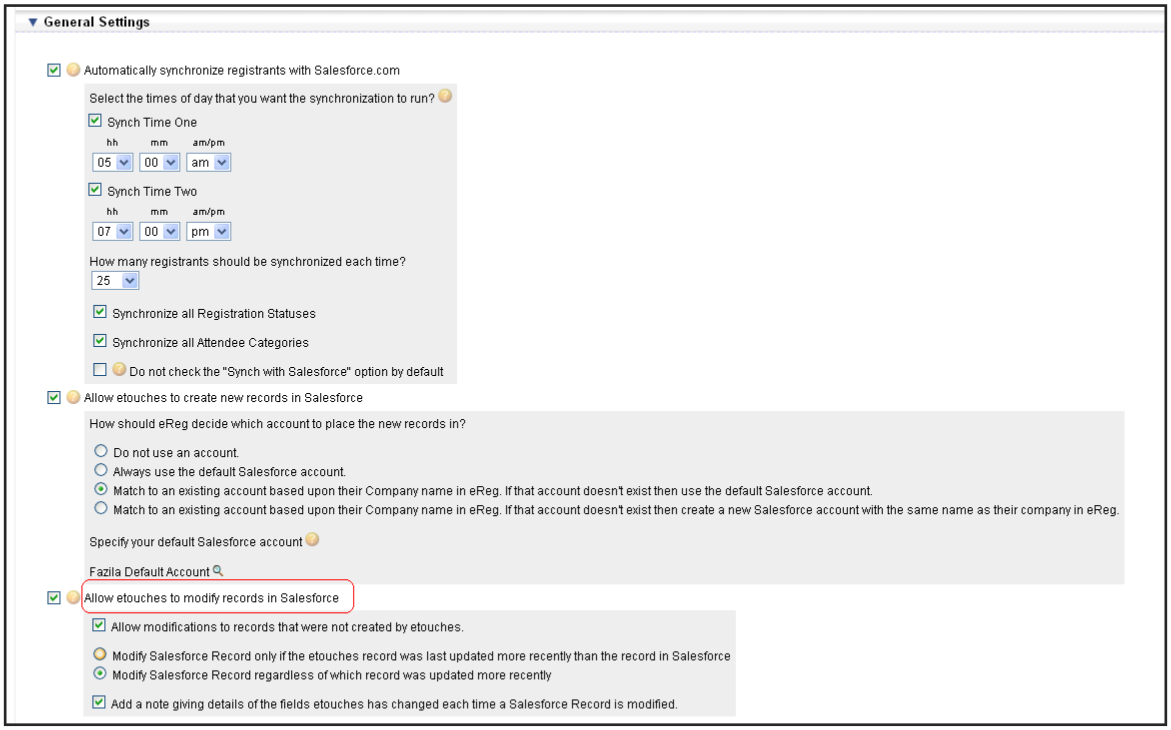
NOTE: Don't forget to specify the default account name, otherwise it will not be assigned to an account.



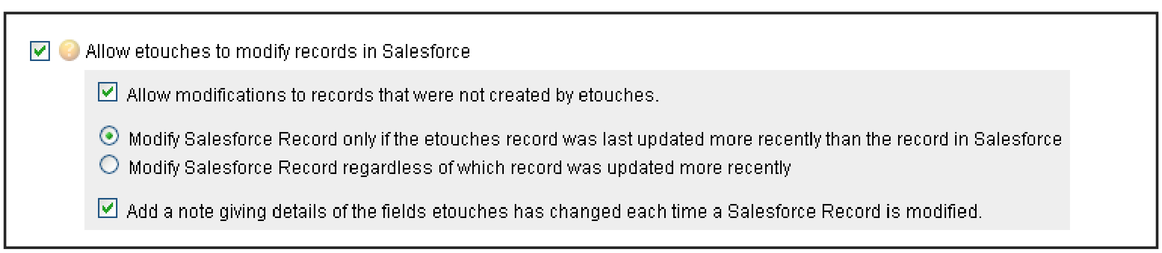
d. **Match to an existing account based upon their Company name in eReg. If that account doesn't exist then create a new Salesforce account with the same name as their company (eReg Company name).**
The synchronization will search for an account with the same company name that is in the eReg registration record. If it cannot find a matching account it will create a new account in Salesforce with that company name.



Option 3: Allow eTouches to modify records in Salesforce



This area focuses on already existing Salesforce accounts that you have and whether or not the synchronization from eReg to Salesforce will allow modifications to those standing accounts.



- Allow modifications to records that were not created by etouches.

- Modify Salesforce Record only if the etouches record was last updated more recently than the record in Salesforce.

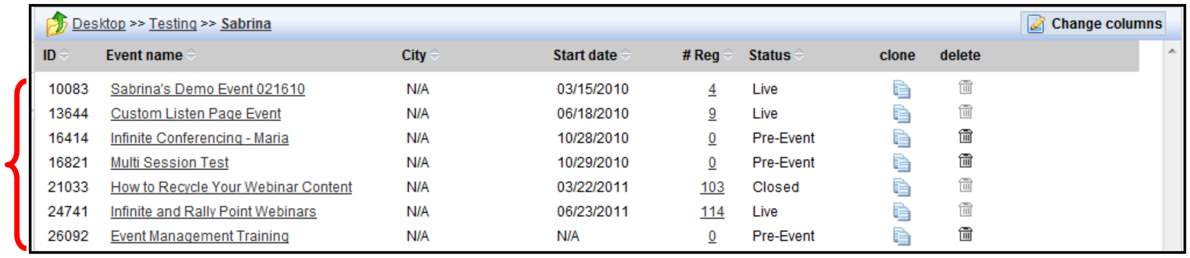
- Modify Salesforce Record regardless of which record was updated more recently.

- Add a note giving details of the field's etouches has changed each time a Salesforce Record is modified.
  This option will tell you what was updated within each account record in Salesforce. So if the phone number or address was updated, there will be a note within the record describing what was updated during the synchronization.

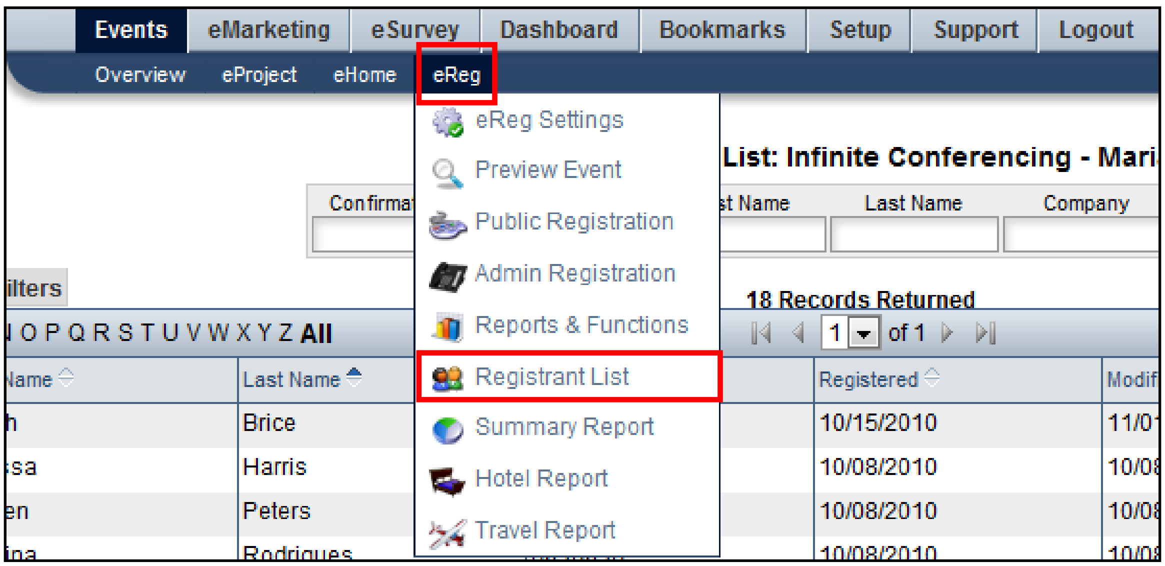
For example, attendee's personal details were updated in etouches, therefore there are notes in Salesforce informing you of what was updated:

Check Registrations

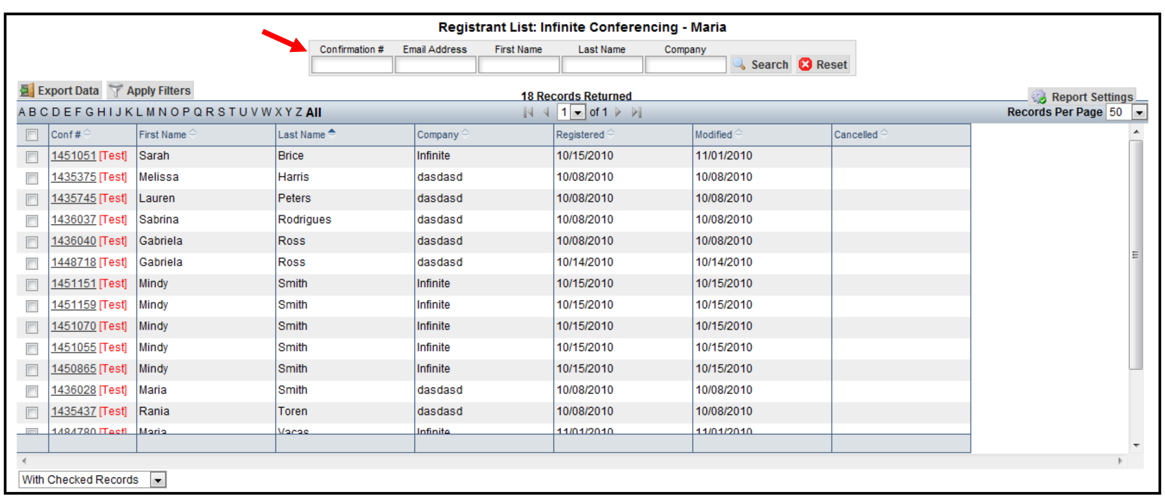
1. Click on your event.



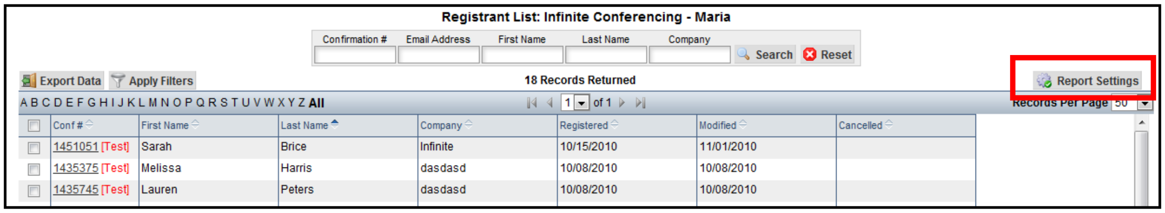
2. Click on the **eREG – REGISTRANT LIST**.



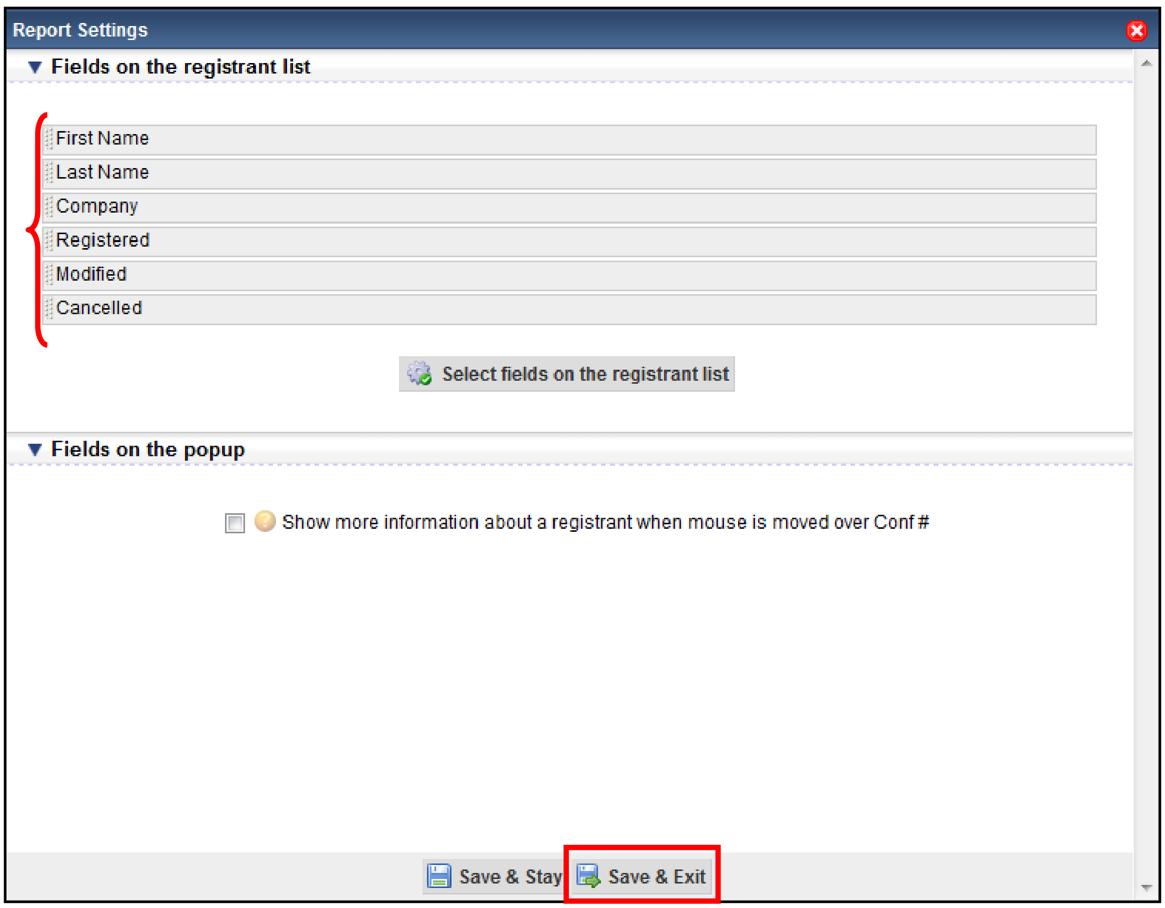
3. You can see the complete list of all the registrants to your event. There are search fields to help you search for a specific person.



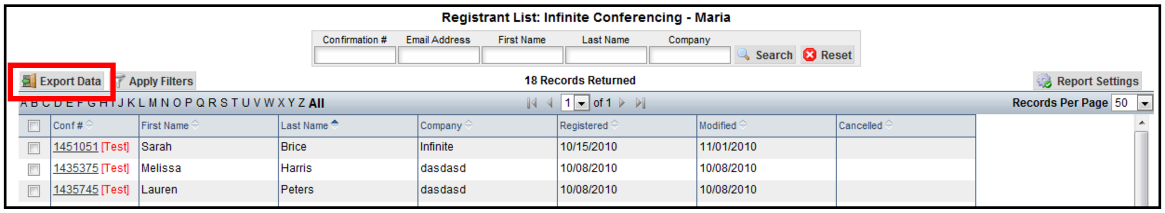
4. You can change the report settings by clicking on the **REPORT SETTINGS** button.

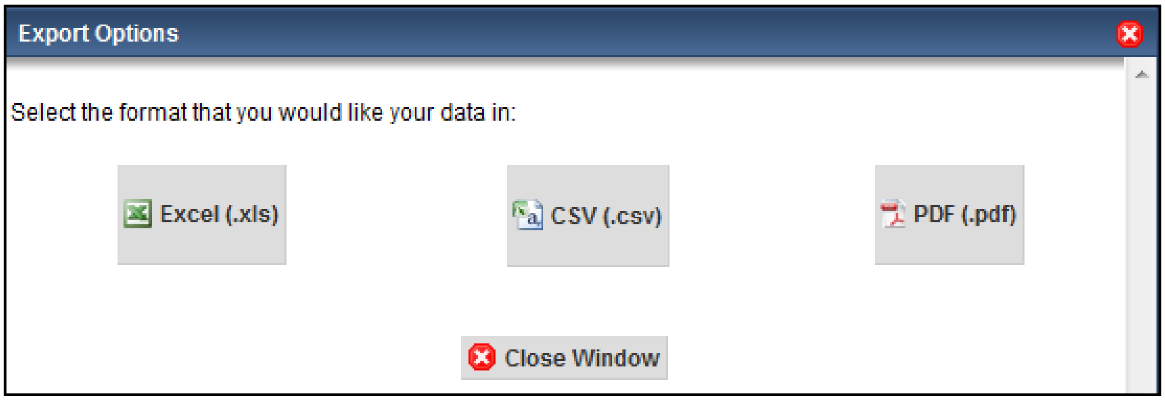


5. The “Report Settings” window will appear allowing you to organize the fields in the order that you would like to view your report by simply dragging them. Once you are done, click on **SAVE & EXIT**.

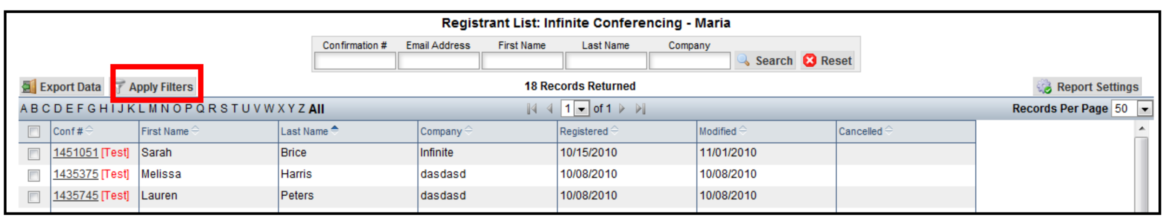


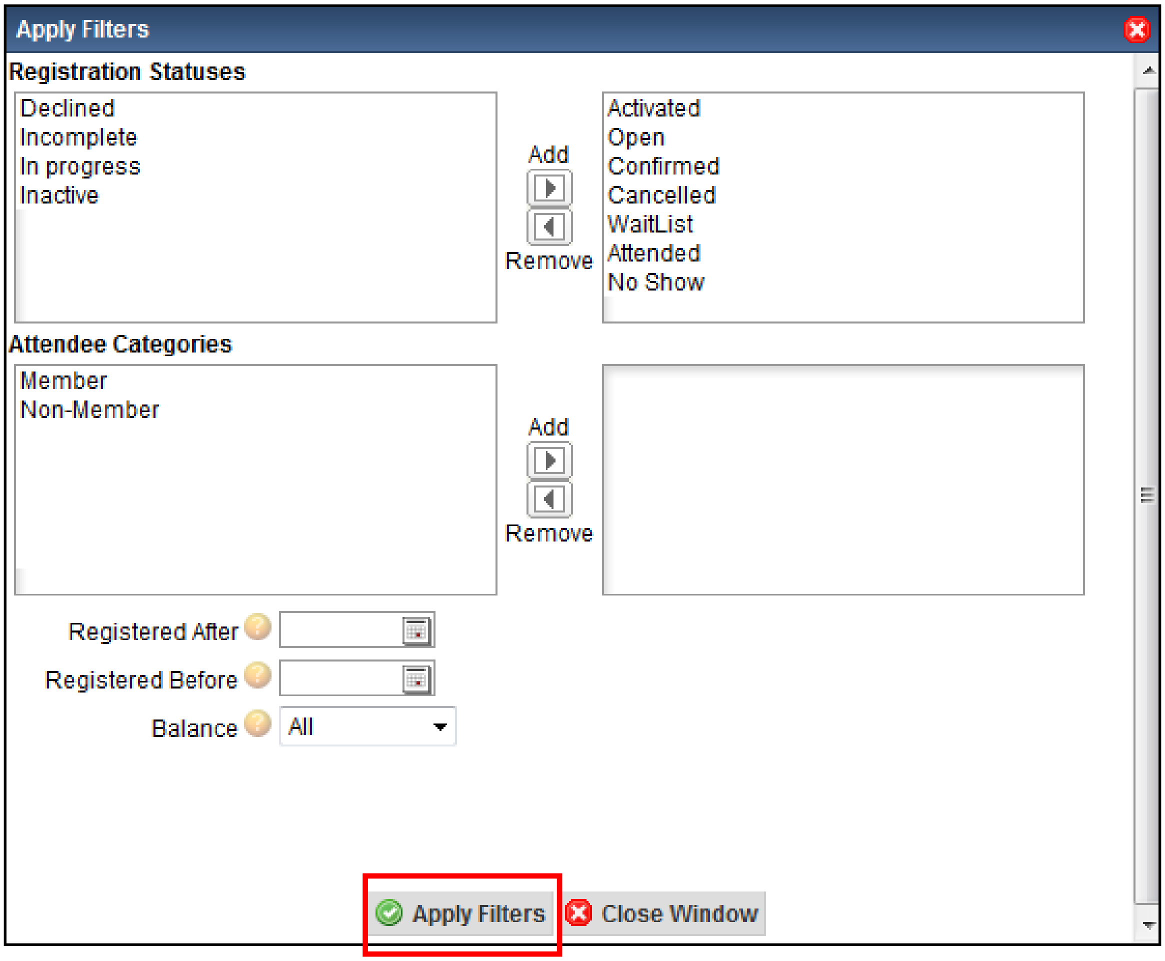
6. You have the option of exporting the data into an excel, CSV, or PDF file. Click on the **EXPORT DATA** button and select which format you would like your data in.





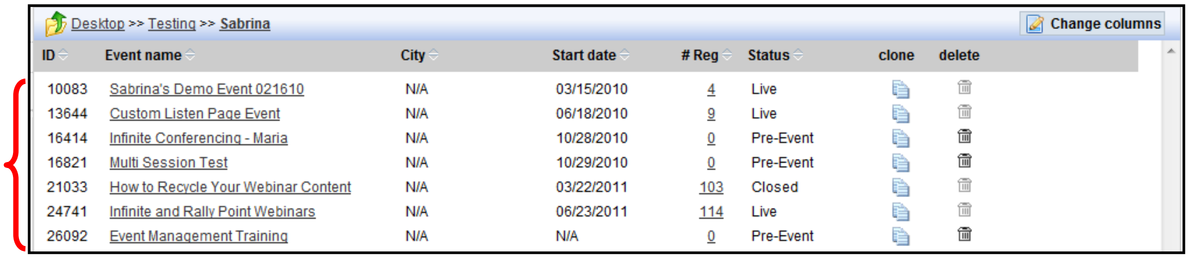
7. There is also the option to filter the report by clicking on the **APPLY FILTER** button. An "Apply Filters" window will open up where you can select which registration statuses you want to filter and also you can select time ranges to see if people registered before or after a given date. Click on **APPLY FILTERS** to save your change when you are done.



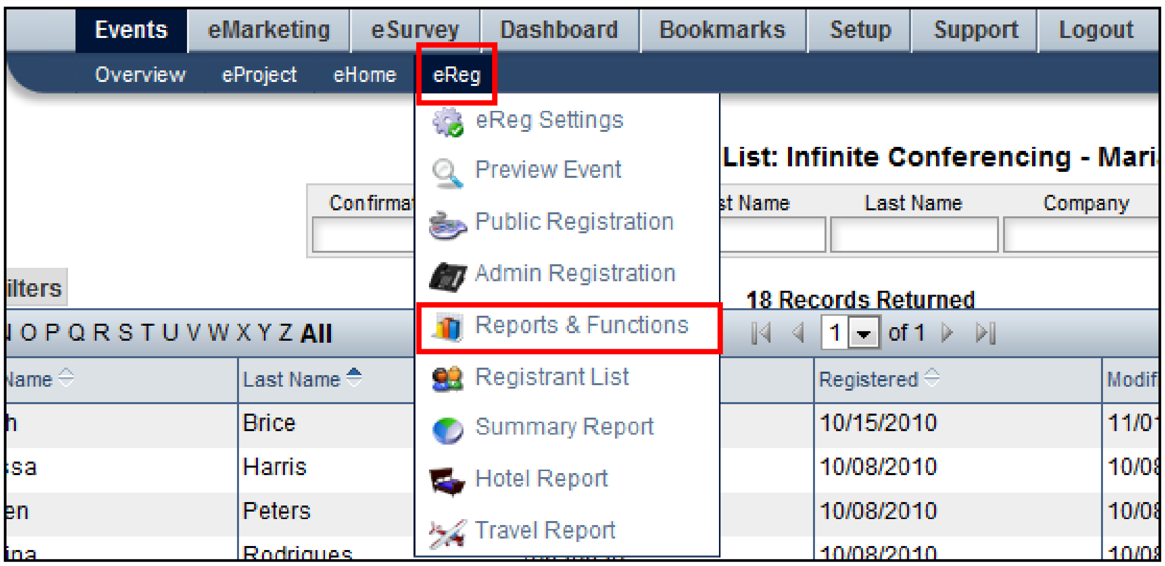

Apply Filters
Registration Statuses
Declined
Incomplete
In progress
Inactive
Add
Remove
Activated
Open
Confirmed
Cancelled
WaitList
Attended
No Show
Attendee Categories
Member
Non-Member
Add
Remove
Registered After
Registered Before
Balance
All
Apply Filters
Close Window

Create your Reports

1. Click on your event.

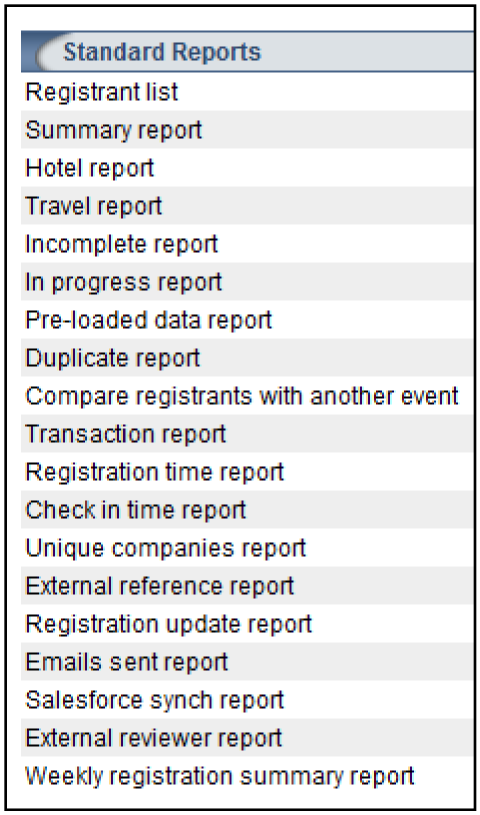


2. Click on the **eREG – REPORTS & FUNCTIONS**.

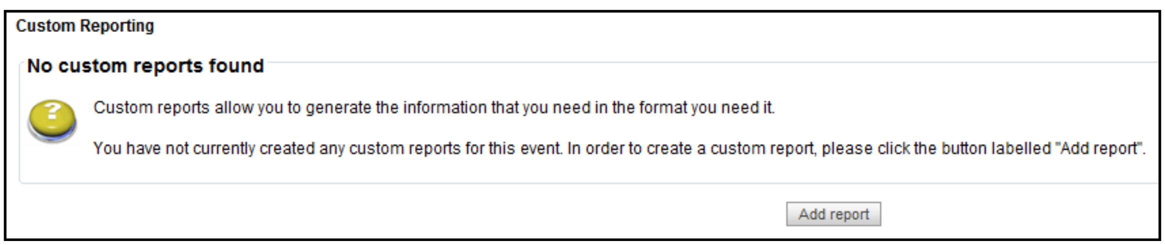


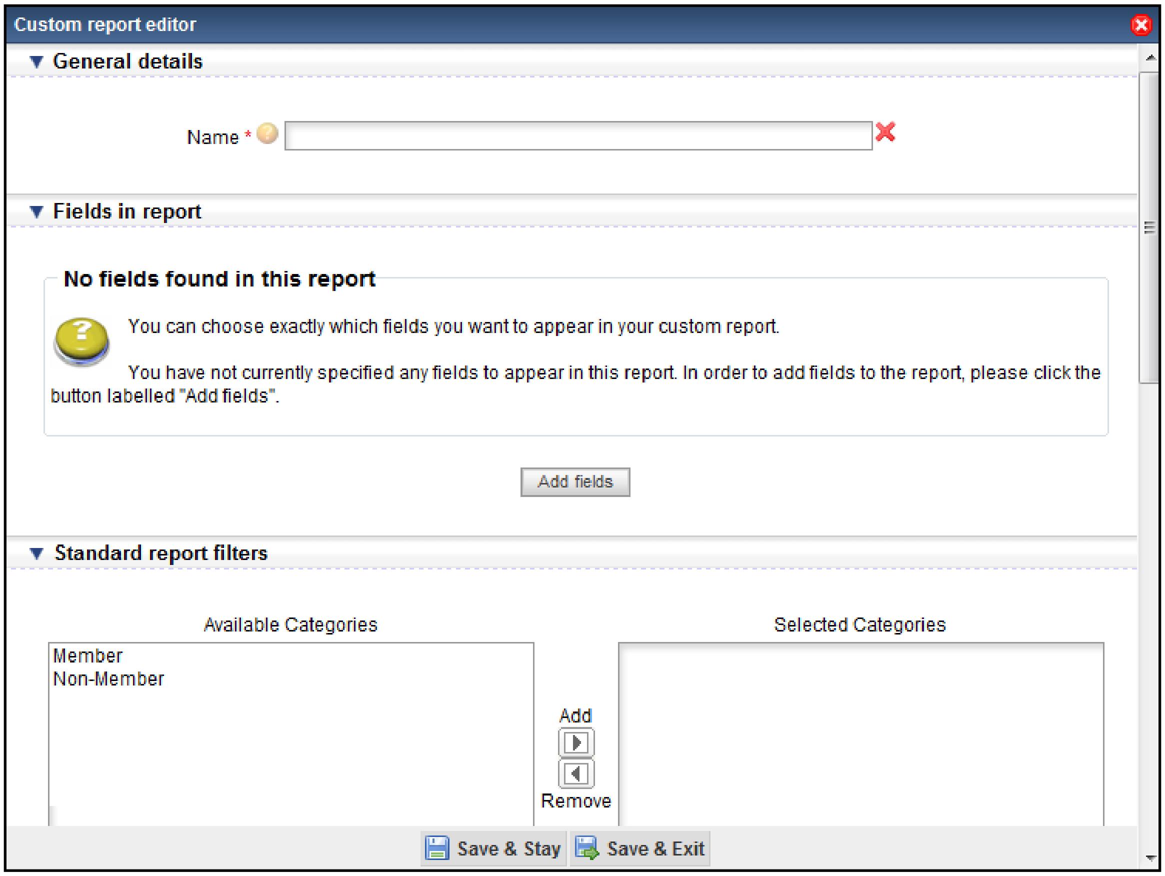
3. There are different kinds of reports that you can choose from: Standard Reports, and Custom Reports.

Standard Reports: the system already has a collection of reports that have been created for your ease. Click on the one that you would like to see in order to view it.



Custom Reports: this section allows you to generate your own reports with the information that you need and in the format that you would like. Click on the **ADD REPORT** function and enter all the necessary information in the "Custom Report Editor" window.




Custom report editor
General details
Name *
Fields in report
No fields found in this report
You can choose exactly which fields you want to appear in your custom report.
You have not currently specified any fields to appear in this report. In order to add fields to the report, please click the button labelled "Add fields".
Add fields
Standard report filters
Available Categories
Selected Categories
Member
Non-Member
Add
Remove
Save & Stay
Save & Exit