activeevents CONFERENCE™

Conference 6.1
Registration Management Quick Reference

This quick start guide outlines the basic workflow for key Registration management tasks in the ActiveEvents Conference system.

To complete these tasks, log in to the Conference Administrator as a user with the specified security role. When following these instructions, start a task from the menu bar at the top of the interface. When steps refer to "the left navigation bar," choose an option in the list of links on the left of the page.

For detailed instructions, see the Conference documents and online help at http://www.wingateweb.com/support.

This document includes these sections:

1: Registering an Attendee

NOTE
To complete Registration tasks, you must have a System Administrator, User Administrator, or Call Center Administrator security role on your user account.

After registration setup is complete, attendees can register using the public Registration site. As necessary, you can complete registration on behalf of a user.

1. Create the user record.

Users > **Add New User**

2. Add details to the user record.

In the user record, choose these options on the left navigation bar:

User Data > **Contact Information**
User Data > **Profile**
User Data > **Attendee Info**
User Data > **Person Files** (badge photo)

3. If you are using registration codes to apply attendee types, prices, discounts, etc., assign the appropriate code to the user.

In the user record, choose Registration > **Registration Codes** on the left navigation bar.

4. If are using vouchers and this attendee has a voucher code, apply the voucher code.

In the user record, choose Registration > **Vouchers** on the left navigation bar.

5. Purchase a registration package and enter payment information.

In the user record, choose Registration > **Registration** on the left navigation bar.

6. If appropriate, reserve the attendee's hotel room and enter payment information.

In the user record, choose Hotels > **Hotel Booking** on the left navigation bar.

7. If appropriate, schedule the attendee for sessions.

In the user record, choose SCPS > **Personal Schedule** on the left navigation bar.

2: Managing Attendee Records

NOTE
To complete Management tasks, you must have a System Administrator or User Administrator security role on your user account.

You can complete these management tasks, as appropriate.

1. Create or import user records

Users > **Add New User**
OR
Users > **Import Users**

(If you are using the Nomination tool, users may also be added as nominees through that site.)

2. Search for existing user records.

Users > **Simple Search**
OR
Users > **Advanced Search**

3. Edit the attendee's user name and password, or reset the password.

In the user record, choose User Data > **Edit Login** on the left navigation bar.

4. Edit the person's details on the user record.

In the user record, choose these options on the left navigation bar:

User Data > **Contact Information**
User Data > **Profile**
User Data > **Attendee Info**
User Data > **Person Files** (badge photo)

5. Edit the same field on multiple user records (bulk edit).

- Create a user worklist

  Users > **Advanced Search**, and add records to the worklist

- Access a saved worklist.

  Users > **Worklist**

- Set up the fields to edit.

  In a worklist, choose the **Bulk Edit** option

6. Send an email message.

- To an individual user

  In the user record, choose Advanced > **Emails** on the left navigation bar.

- To a group of users

  In a worklist, choose the **Send Email** option

7. Update the user's purchase item or payment information.

Registration > **Registration**
OR
Registration > **Order History**

8. View or edit the attendee's session schedule:

Sessions > **Personal Schedule**

9. Transfer the user's registration and hotel order from one person to another.

In the user record, choose Registration > **Order Transfers** on the left navigation bar.

3: Running Registration Reports

1. View reports about registration, orders, refunds due, check in, gift redemption, revenue, etc.

   Reports > User > **Registration Reports**

2. View reports about hotel rooms, sub-block reservations, and reservation changes.

   Reports > User > **Hotel Reports**

   NOTE
   To view Hotel reports, you must be the primary owner of the hotel. After you run the Room List (Hotel Bookings) report for the first time, go to the Change Report and set the time so any changes after that time will be tracked.

3. View reports about registration codes and emails.

   Reports > User > **Participant Reports**

4. View reports about ActiveEvents Connect activity, blog activity, photos, inappropriate words in group and person postings, etc.

   Reports > **ActiveEvents Connect**

5. Create custom reports, as desired.

   Reports > **Create Custom Report**, and choose **User** as the report type.